Beauty & Personal Care

5

When it comes to beauty and personal care products, Indonesians are increasingly looking up popular active ingredients and skin issues. Factors like official approvals, ingredients, and brands help shoppers make purchase decisions.

As Indonesians spend more time indoors or mask up, many are seeing new skin issues arise. Consumers are looking for science-based solutions that will help in resolving their issues.

1

People are trying to understand their skin problems...

masalah kulit

Search interest in masalah kulit (skin problems) grew by 48%.

+48%

We see a 19% growth in search interest in sel kulit mati (dead skin cells).

+19%

Search interest in maskne (acne caused by wearing a mask) surged by 700%.

maskne
FFP2

+700%

2

....and find solutions for them.

Searches related to skin-brightening saw a 25% growth.

+25%

Search interest in anti-aging grew by 29%.

+29%

Consumers looked for acne cures, with search interest in serum jerawat (acne serum) rising by 84%.

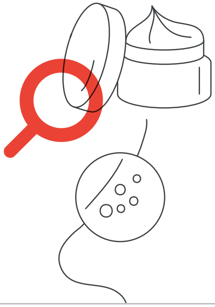
+84%

20% growth for serum wajah (face serum).

+20%

Search interest in skincare menghilangkan flek hitam (skincare products to remove black spots) grew by 91%.

+91%



+42%

We see a 42% growth in search interest in double cleansing.

There was a 33% growth in search interest in exfoliating toner.

+33%

Even when shopping for cosmetics,

Indonesians are looking for products that are skin-friendly.

Growth in search interests in:

lip serum **+205%**

serum foundation **+42%**

Hair care is a growing concern for Indonesians.

Growth in search interests in:

shampo ketombe **+36%**
dandruff shampoo

shampoo rambut rontok **+19%**
hairfall shampoo

Searches for keratin grew by 27%, with a 72% growth in search interest in shampo keratin (keratin shampoo).

shampo keratin

+72%

Search interest in serum rambut (hair serum) grew by 34%.

+34%

Hair tonics were popular among Indonesians.

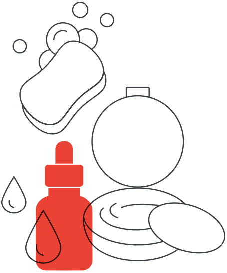
Growth in search interests in:

tonic rambut rontok **+48%**
hairfall tonic

tonic rambut **+36%**
hair tonic

People are interested in supplements that have skin and hair-care benefits.

Growth in search interests in:



collagen drink **+86%**

serbuk kolagen **+83%**
collagen powder

sabun kolagen **+61%**
collagen soap

serum collagen **+34%**
collagen serum

glutathione

Indonesia saw a 24% growth in search interest in glutathione, a natural antioxidant known for skin and hair regeneration.

+24%

Search interest in vitamin kulit (skin vitamin) grew by 24%.

+24%

vitamin kulit

Indonesians are finding joy in small pleasures by creating their own spa experience at home.

sabun organik

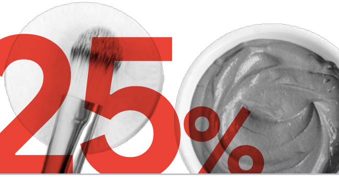
Search interest in sabun organik (organic soap) grew by 44%.

+44%

Searches related to hair masks rose by 22%.

Search interest in clay mask grew by 25%.

+22%



+25%

Searches for body scrubs increased by 28%.

Growth in search interests in:

shower scrub	+83%
lulur kopi coffee scrub	+83%
lulur zaitun olive scrub	+50%

+28%

Indonesians heading outdoors are also keen to keep their skin healthy and comfortable.

Keywords related to sun protection saw a 33% increase in searches.

+33%

parfum wanita

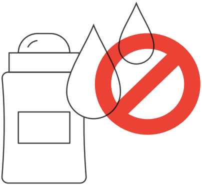
Search interest in parfum wanita (women's perfume) grew by 43%.

+43%

Growth in search interests in:

deodorant roll on **+41%**

deodorant antiperspirant **+20%**



Search interest in face mist grew by 103%.

+103%

face mist

We see rising awareness that beauty and personal care is for everyone, including men. Men's grooming products are growing in popularity.

Growth in search interests in:

facial wash men	+62%
serum pria serum for men	+57%
parfum pria perfume for men	+20%
moisturizer men	+19%

When it comes to hair care, men

had specific preferences. Search interest in pomade water based grew by 82%.

+82%

Three factors influence Indonesians' shopping behavior when looking for beauty and personal care products: official certifications or approvals, active ingredients, and brands.

1

Specifically, we see that consumers are looking for products that are halal-certified as well as approved by Indonesia's BPOM (Badan Pengurus Obat dan Makanan/Drug and Food Supervisory Body).

skincare bpom

Shoppers prefer products that are guaranteed to be safe, with search interest in skincare bpom increasing by 51%.

+51%

Search interest in skincare halal (halal skincare) grew by 18%.

+18%

Search interest in kutek halal (halal nail polish) rose by 37%.

+37%

2

Consumers are researching active ingredients in products and opting for those that work best with their skin types.

There is growing interest in learning more about skincare, with search interest in kandungan skin care (skincare ingredients) growing by 24%.

+24%

Active ingredients were popular among Indonesians.

Growth in search interests in:

ceramide **+133%**
for moisturising

niacinamide **+127%**
for brightening

hyaluronic acid **+103%**
for hydration

retinol **+96%**
for anti-aging

peptide **+44%**
for collagen production

Search interest in cica rose by 35%.

+35%

The viral vegan skincare ingredient bakuchiol saw a 30X growth in search interest.

+30x

Skin exfoliation is on the rise, with search interest growing in:

- aha bha **+58%**
  alpha-hydroxy acids, beta-hydroxy acids
- acid tone **+39%**

3

There is growing interest in new "indie" skincare brands. These affordable brands typically focus on individual active ingredients, allowing people to mix and match to create their own skincare regime.

Searches for indie skincare brands grew by 252%.

+252%

Indonesians are curious about trendy brands, with search interest in KOL skincare brands rising by 333%.

+333%

MARKETING IMPLICATIONS

1

Broaden keywords and provide relevant information to help consumers during the messy middle

With information at our fingertips, people are becoming savvier researchers. Consumers will spend time researching about their skin or hair-care needs, or trendy new products and active ingredients. By expanding your keywords, you can tap into this key moment to be present for shoppers who are searching. To make it easier for shoppers to choose your brand, you can offer helpful information along every touchpoint, whether it is via digital video, your website, or creative assets.

When the pandemic hit, Kiehl's Indonesia had to pivot to deliver the brand's luxury and boutique experiences through digital channels. For its first-ever fully digital campaign with YouTube Ads and Google Search, Kiehl's invested in Brand Lift Study and Google Analytics measurement tools to better understand its target audience. Leveraging these findings allowed Kiehl’s to optimize its ad spend and achieve almost 3X ad recall, +140% search lift (a record high for luxury skincare), and a 1.2X sales growth compared to the previous period.

SINCE Kiehl's 1851

Somethinc is one of Indonesia's leading and fastest growing skincare brands, known for its innovative products, and its passion and deep knowledge about the industry. To create awareness about its brand and new releases, Somethinc generated buzz through YouTube as well as adopted Search campaigns, which improved ROAS by 300% and brand awareness by 45%. As a newcomer to the beauty industry, Somethinc successfully boosted audience recognition by using highly engaging creatives and the right targeting strategies.

MAD ABOUT LEMONS
MAKEUP BLOG

2

Stay on top of evolving beauty trends

Rising searches reveal that consumers are interested in men's skincare and hair care, products for outdoor activities, and sustainable beauty. As you design new products and plan your marketing campaigns, don't forget to keep these trends in mind.

Garnier Indonesia embarked on its Green Beauty movement, an end-to-end business transformation to support Indonesia's environmental needs, such as fighting plastic pollution through waste management efforts. Within one year of the launch, Garnier collected over 123 tonnes of waste across Indonesia to be recycled. The brand is also partnering with e-Recycle to make it easier for consumers to make more sustainable choices.[6]

3 Shift your messaging from functional to experiential

Consumers no longer regard skincare and hair-care products as essentials for basic cleanliness or hygiene. They are also a way to pamper themselves at home. To connect with consumers, brands need to integrate this self-care aspect into product and creative development.

Sources:
All Google Search data points included in this report are from Google Trends, Indonesia, Sep 1, 2020 - Aug 31, 2021 vs. Sep 1, 2019 - Aug 31, 2020, unless indicated otherwise.

6. garnier.co.id, 2021