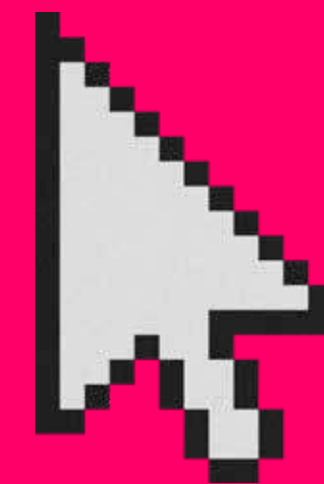
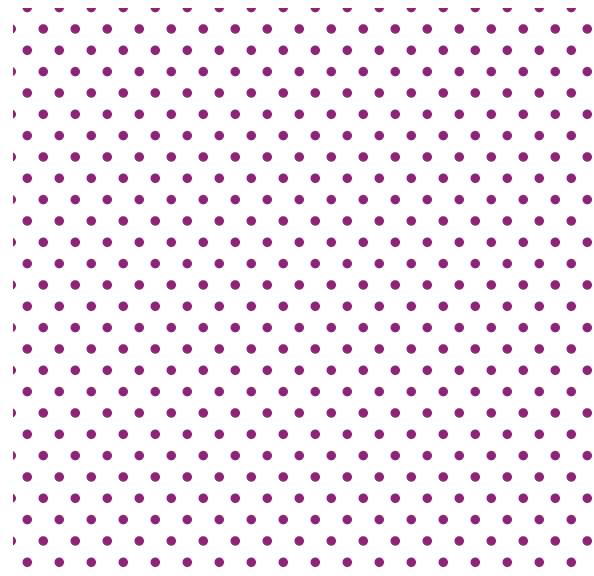


Spring

# *beautiful* stranger

Understanding the mindset of the Middle India beauty consumer





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# Introduction

Globally, the beauty category has always been more nuanced than the Fenty shade range. Influenced by factors ranging from history and geography to the weather, beauty trends tend to be fluid in their evolution and gradient in their adoption.

In the past decade alone, India has seen massive scale and diversity in the beauty category. With increasing access to smartphones and the internet, global trends now reach the Indian consumer in a steady stream as opposed to the trickle of yesteryear. There's been a marked spike in both awareness and adoption, and we're seeing that play out in different ways. There's been a noticeable boom in the quantum of social media influencers & content in the category. Offline, we see more and larger cosmetics counters at department stores. And one can't ignore the massive spurt of homegrown D2C brands in the beauty and personal care spaces.





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**Like skin tone palettes, however, no audience is homogeneous in its behaviour. Anyone who's ever tried taking a Starbucks order for a group of friends will tell you that preferences can vary greatly even within a 2-digit audience subset.**

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It's safe to presume that the entirety of the Indian beauty consumer base would display a far wider range of behaviours and patterns.

Working with several beauty brands over the past 4 years piqued our curiosity about the category and consumer, and to put it simply, we had questions.

How do consumers across the country discover the category?

Who's influencing their purchase decisions?

Does the cosmopolitan consumer interact with the category in a manner very different from their non-metro counterpart?

This led us to look closer at the emerging consumer segment from smaller cities in India, and how they interacted with the beauty category.

Fascinated by some of the beauty data & content emerging from smaller towns across India, we wanted to delve into the lives of some of these consumers to understand their relationship with the category. And boy, did we learn a lot – and unlearn even more.

The following report captures some of our learnings, observations and anecdotes from these **'beautiful strangers'**.

**So many questions,**  
*So little time.*



# Meet *MiMi*

We set forth on this exploration to see how consumers from certain regions across India discovered and consumed beauty. We focused our attention on an audience that could offer us perspectives that we weren't otherwise privy to. From beauty vlogs to deep conversations and ethnographic market visits, we sifted through them all to better understand our consumers' beauty attitudes and behaviours.

We spent time considering which segment we wanted to study. We made sure to pick cities that represented growing beauty consumption, both online and offline, across different geographies within the country. Moreover, we identified ones that aren't satellites to metros, so as to not simply reflect big-city behaviours. In true Goldilocks fashion, they had to be "just right." To that end, we identified 6 markets that fit the bill :

**Coimbatore**

**Guwahati**

**Varanasi**

**Ludhiana**

**Mysore**

**Raipur**





We also wanted to understand the behaviour of consumers who were still early in their journey, to avoid biases of long-standing traditions or habits.

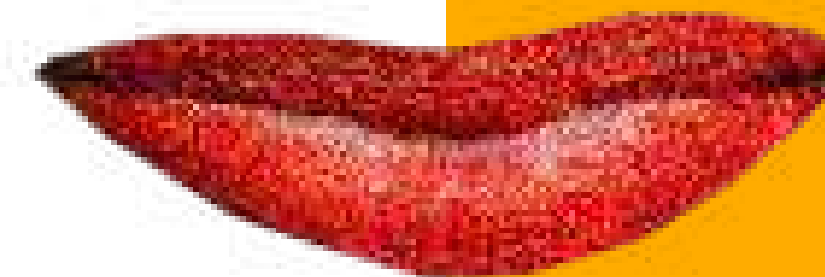
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**The 18-25 yr female cohort was the ideal one to speak to – digital natives with access to information and content, who are still finding their space in the world of beauty. Or as we shall address them for the purpose of this report, the Middle India Makeup Initiate (MiMi)**

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# What makes up MiMi's *mind*?

As we spent time speaking to the MiMi cohort and understanding their relationship with beauty, certain patterns emerged. Here are some of the common trends we noticed that influence MiMi's journey into beauty.





1.

# The *societal* make-up

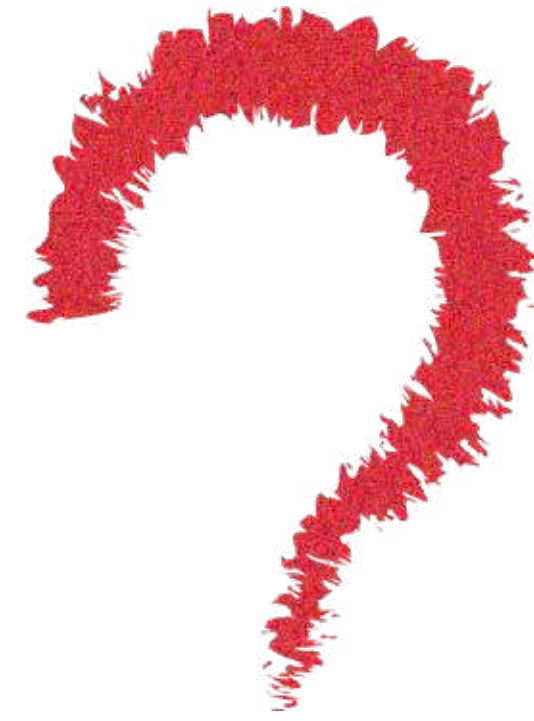
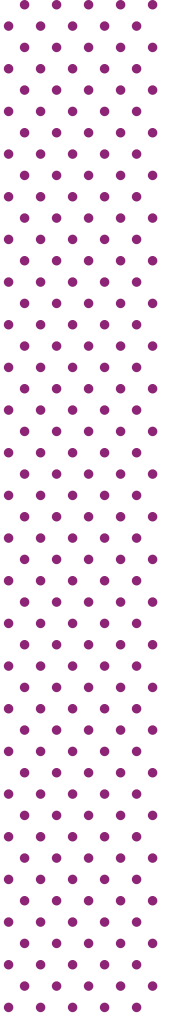
Societal norms and guidelines play a considerable role in the adoption of beauty products in these markets. Smaller cities, spared from the bustle of city life, have a far more closely woven social fabric – one in which each individual yarn is both noticed and important. Neighbourhoods are a collective, with a strong sense of community and social identity.

In social constructs such as these, we've found that the sense of belonging is integral for each individual.

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**In our conversations with MiMis, we heard how they appreciated the sense of community, and were always mindful to stay within the norms of social expectations.**

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For instance, the overarching narrative that **“Make-up is only for grown-ups”** discourages young women from truly incorporating it into their lives before the age of 18. While they might experiment in the privacy of their home, and even consume a great deal of beauty content, the MiMi is conscious of the impact her choices have upon the overall social standing and acceptance of herself and her family.

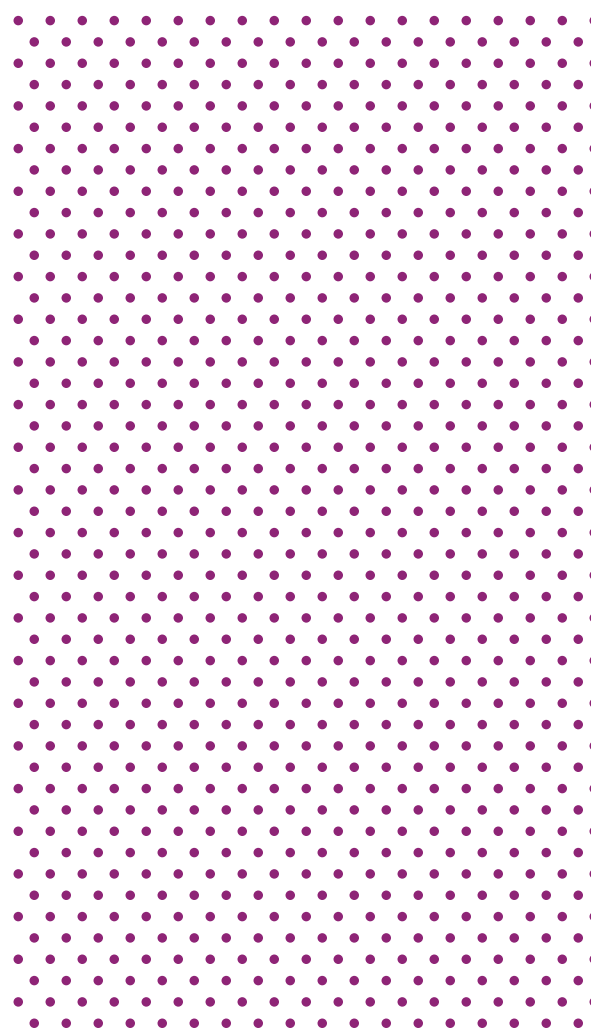
Makeup is not exactly viewed as taboo within this society. But the MiMi, just entering adulthood and embracing her own identity vis-a-vis the category, must navigate her debut mindfully. It isn't uncommon to be chided by one's elders about the frivolity of makeup. At the same time, it's an unwritten rule that young women cannot ignore the glamour of makeup either.

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**“My dad always commented that I shouldn't be spending too much time on these frivolous things so while I enjoy it but I also don't want to go overboard and spend too much time and money on it.”  
- 21-yr old MiMi from Ludhiana**

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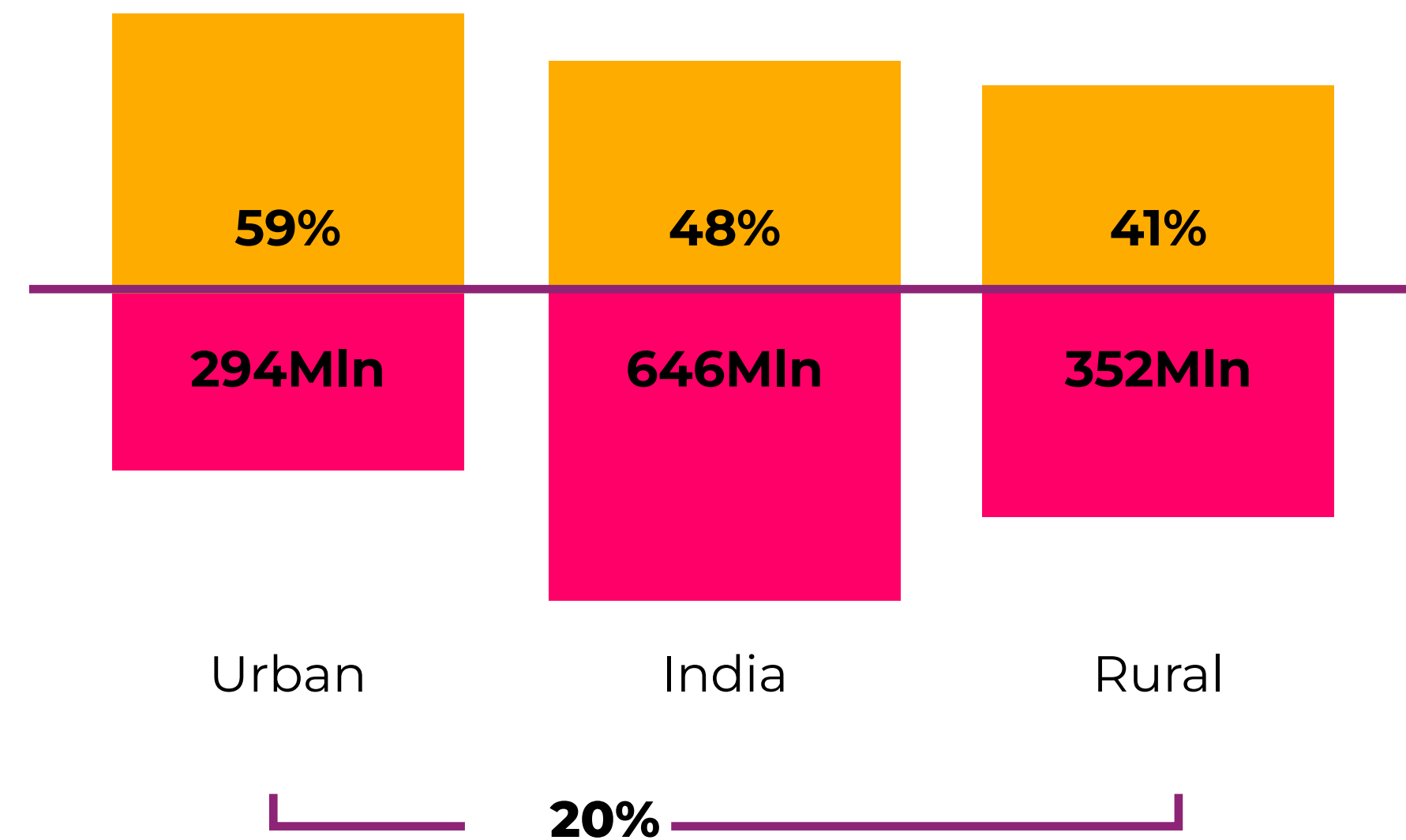
She must, therefore, walk the fine line between being properly groomed and “overdoing” it. While avoiding makeup altogether skews towards not being presentable, investing excessively (be it money or time) in makeup is interpreted as vanity and a lack of interest in more serious matters.



2.

# Social Media: *The reel vs real* world conundrum

In 2022, India now has over 646 million active internet users across the country, with a staggering growth rate of 45% amongst non-urban regions in the past 2 years alone. This uptick has also seen a size-able contribution from female users, with numbers indicating a 61% growth rate in the past 2 years. The volume of male users saw relatively slower growth at 24%.



Base : Among those who are aged 12 years+



It's no surprise that social media and digital content consumption has seen a corresponding spike. Video content consumption still tops social media usage behaviour, and our target audience was no exception.

We tend to assume then, that the myriad of makeup influencers and their millions of YouTube tutorials would be the answer to every beauty debutante's prayers. After all, what better way to learn about a category that's evolving on an almost daily basis, right?

Interestingly, however, that wasn't the case.

YouTube Shorts are a popular format, offering bite-sized content across a plethora of topics. Within the beauty category itself, the format houses short videos covering product reviews, lookbooks, application how-tos, and more. A veritable smorgasbord of makeup media to feed on (pun unintended) as you scroll.

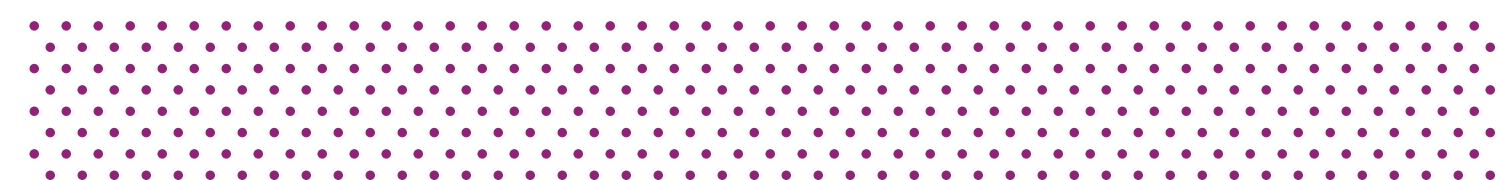
But this endless buffet is met with a cautious appetite.

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**The MiMi enjoys scrolling through various feeds to browse beauty content, but they view it more as a source of awareness than inspiration.**

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Think of it as the content equivalent of “a great place to visit, but I wouldn't want to live there”.



A common sentiment we heard from several MiMIs was,

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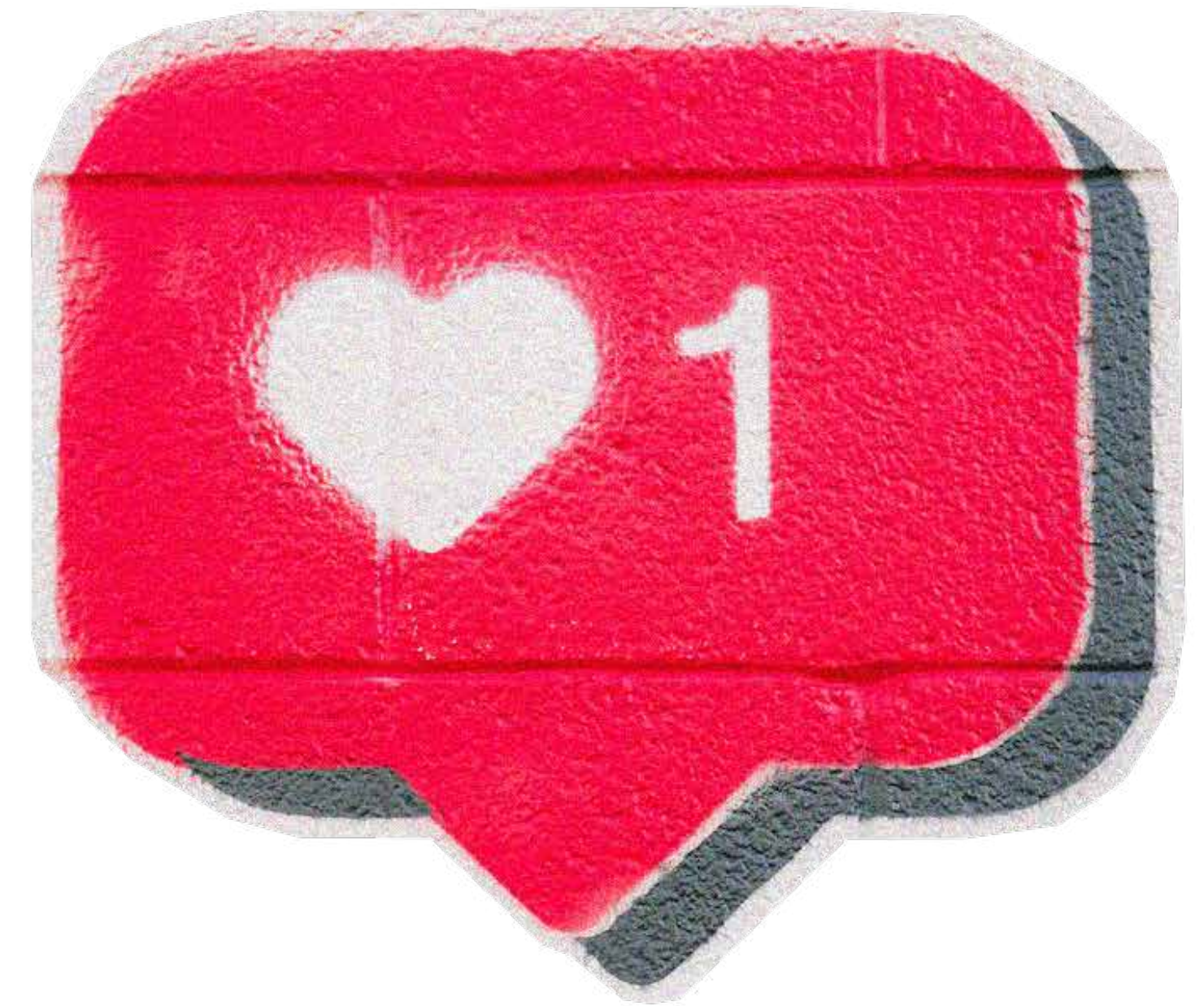
**“I love watching transformation videos on IG, but I would never do that kind of makeup. It’s too much, nobody here creates those kinds of looks.”**

---

There’s a dearth of beauty content that’s relevant to her societal realities, hence contributing little value in terms of inspiration.

What does this translate to? A MiMi is not averse to watching beauty bloggers talk about the latest trends. She is unlikely, however, to immediately rush to buy that trending product she saw her favourite Instagrammer or Bollywood celebrity use. She would rather spend a little time assessing if it’s right for her, before making any sort of purchase decision.

Social media is not entirely ignored, though. Instagram serves more as a means of keeping up-to-date with the latest trends & products, without necessarily adopting them all. YouTube, on the other hand, is her go-to for instructional content – from how to properly blend that new foundation, to how to turn the last dregs of her favourite lipstick into a tinted balm, and everything in between.





Making sense of the information available on the internet can be a little like trying to find the perfect red lipstick – confusing, overwhelming, and often intimidating. With over 2.5 billion (yes, that’s ‘billion’ with a ‘b’!) pieces of content on make-up tutorials alone, it’s easy to forget what you were looking for.

The frustration at the situation was akin to the sentiment of 'water, water everywhere and not a drop to drink'. One MiMi lamented,

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**“There’s everything online but really it’s nothing because who is going to filter through all that information and tell me what is right for me.”**

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So where does she turn in order to figure out if something is right for her?



# 3.

## Beauty begins at *home*

A MiMi's first tryst with beauty is most often at her mother's dressing table. The sense of excitement and adventure of – sneakily – trying on a lip gloss or kajal creates the foundation of her relationship with the category. The influence of these early experiences is perhaps why most MiMIs are inspired by their mothers, aunts and older siblings. These early memories also shape their brand perceptions - a Lakme is attainable and trustworthy, while a L'Oreal is aspirational and for special occasions.

It isn't out of the ordinary for young girls in these markets to lean on their mothers for reliable advice when foraying into the world of colour cosmetics and skincare. On the contrary, the MiMi considers it a matter of pride that her mother was a mentor along her journey.

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**“I was introduced to beauty by my mother, I used to always watch her and try to learn from her. She bought me my first products and taught me how to get ready. It felt really good that she introduced me, when someone else says it to me I won't accept it.”**

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Recognising a brand as one that their mothers/sisters/aunts trust also plays a part in the MiMi's shopping list. Rather than reinventing the wheel, they are likely to gravitate towards brands that they recognise/ are familiar with and presume would suit their skin type and tone as well.

The maternal influence doesn't stop just at MiMi's choice of brands. From a very young age, a MiMi is made aware of how her grooming and styling behaviours impact the way society perceives her. She looks to her mother who has navigated these realities herself, to offer a reliable map and balance of advice & observation whilst treading this tricky territory.

Her mother's beauty advice and practices are just one part of the map. She also learns by observing the many women around her – from the little pot of kajal that has its own spot on her mother's dresser, to the light pink lipstick that has practically become the neighbour aunty's defining characteristic. The women around her all have a signature "look," and each of them contributes to how the MiMi internalises the norms of make-up.

4.

# The *unexpected* beauty influencer

The search for guidance doesn't stop at home. The MiMi looks to a wider group of trusted women (and some men, too!) from their social circles for information & inspiration. This includes those within their household (sisters, aunts, cousins, and the like), as well as those they consider "experts" in the beauty department.

This behaviour led to the emergence of a rather unexpected local beauty influencer. Someone who is regarded in the local community as an authority on the subject of beauty and grooming, while also being relatable and understanding the contexts of societal propriety.



# The *local parlour aunty*

The neighbourhood parlour aunty is the ultimate beauty influencer in these towns.

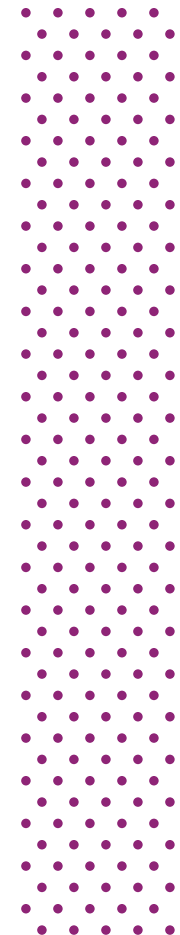
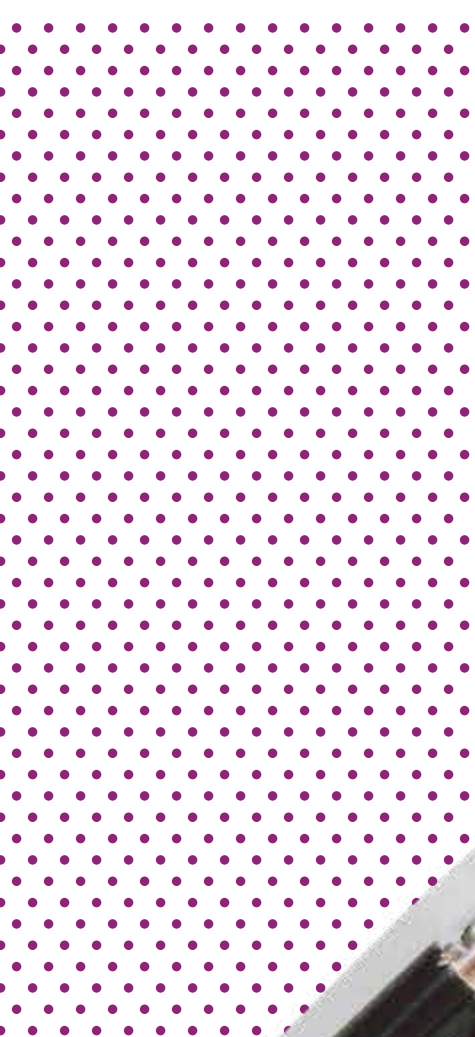
She straddles two very important contexts – she understands beauty better than most, and is also familiar with local societal expectations. She is hence trusted to offer relevant & personalised recommendations. Whether it's how to shape her eyebrows, or what brand of products can be relied on to not irritate her skin, the MiMi's faith in her parlour aunty is like a certain Bollywood star's commitment – unshakeable.

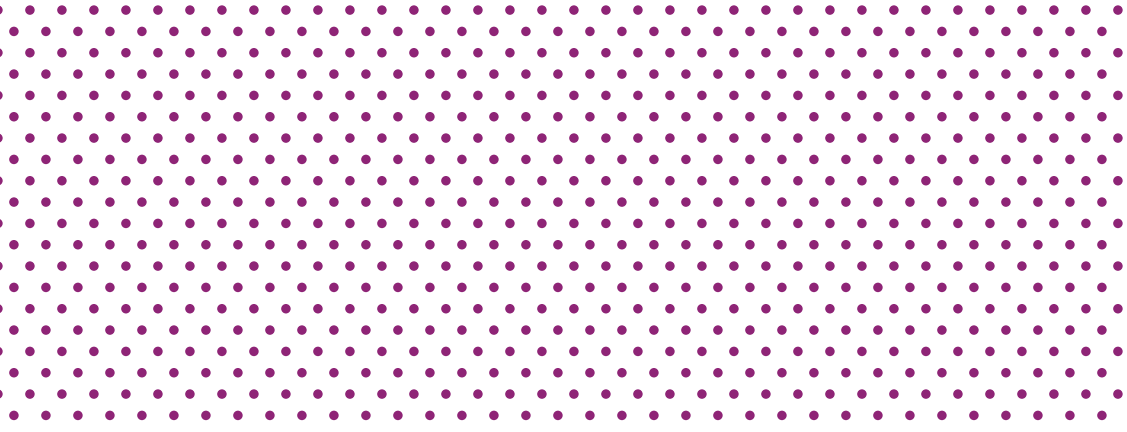
We realised that the sense of affection is mutual. Speaking to a beauty parlour owner in Varanasi, it was evident that she takes her role as a guide to these young girls very seriously. "Many girls come to me telling me their concerns, and ask for help and guidance," she told us.

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**"A lot of them don't even do the basics, so I usually help them with a basic routine and suggest some products as per their requirements."**

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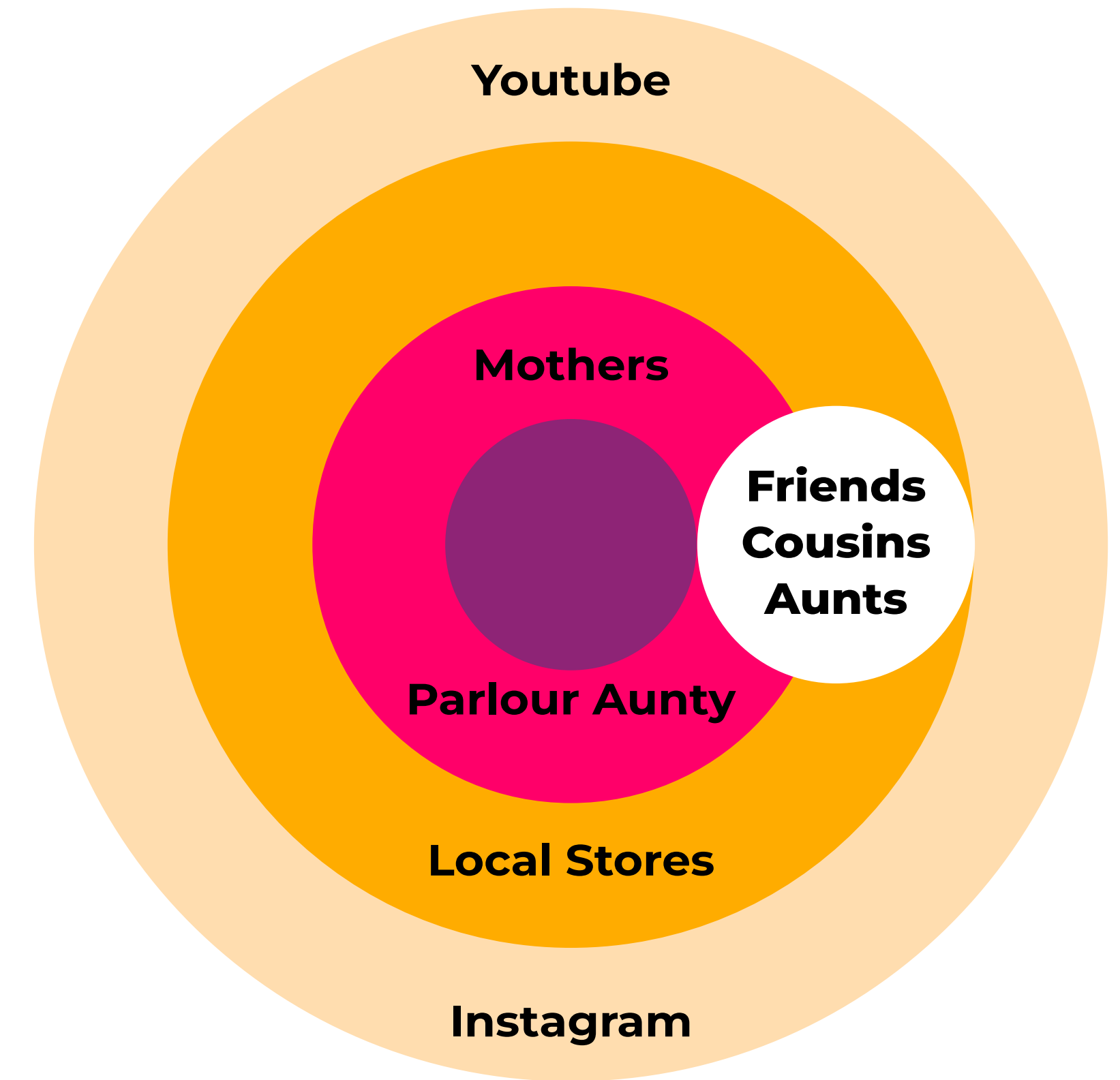


The parlour aunty is often the MiMi's first interaction with grooming and styling outside of their homes. From haircuts as children to their first experiences with threading & waxing, the parlour aunty is often a constant as these girls enter adulthood and experience their first trysts with glamour. Beauty parlours being extremely hyperlocal, their clientele is largely long-term repeat customers. This allows the beautician to develop a rapport with customers.

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**The MiMi finds comfort in the familiarity of their regular parlour aunty and trusts that she knows what's good for their look, keeping in mind the social context in and out of the home.**

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*A visual representation of the sphere of influence in a MiMi's life. Her mother and the local parlour aunty hold pride of place at the centre, with other women in her life in close proximity. Social media hovers in the periphery, with limited influence on her everyday behaviour.*



# How MiMi *views* beauty

Having seen the various factors & faculties influencing MiMi's perspective of the category, we wanted to better understand how each of them trickled into her beauty journey. From the shades she prefers to the looks she wants to recreate, we peered closer at the choices she makes.





1.

# Occasions are *binary*

The media and advertising would have one believe that makeup is highly nuanced. "There's a look for every occasion" is a narrative commonly perpetuated by brands and the media (especially Instagram). It would be easy to presume that a young woman exploring beauty would hence have multiple variants of fundamentals.

We found, however, that was not the case.

The MiMi's approach to beauty is far simpler, combining self-expression with practicality. By observing women within her social circles while keeping social context in mind, most MiMIs have grown to view make-up looks as binary - **one for everyday, and the other for special occasions.**

For everyday wear, the go-to look is minimal, with nude shades and a light hand – think “My face, but better”. Most rely on a simple routine of kajal/eyeliner and a tinted lip gloss to ensure they appear presentable and well-groomed, without looking “made up”. The objective is to look as though they’ve made some amount of effort, and not simply rolled out of bed. It’s a social nicety, a means of showing respect to society and its invisible guardrails. To skip this step would be a slight, construed as disinterest or even disrespect.

It’s a whole different ball game for special occasions. Evening events, particularly those with higher degrees of social interaction (weddings, community functions, etc.) call for a slightly heavier hand with makeup. In these contexts, the effort invested in grooming and styling is considered proportional to their emotional investment in these social relationships. To keep up with expectations of a certain degree of glamour, it becomes vital to break out the heavy-duty products. Now is the time for a more substantial foundation, eye shadow, and maybe a bit of shimmer – within reason, of course.

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**The starkest differentiator between these two scenarios is often her choice of lipstick – a special occasion demands a “bold” lip colour.**

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While the big-city Sephora connoisseur and her Raipur counterpart may be equally excited by the perfect nude lipstick, only one of them would consider it an option for a night out. Conversely, in a MiMi’s social context, while acceptable to wear a brighter/deeper lip colour for a special occasion, the same shade in the daytime would raise eyebrows.

2.

## A skill best learnt *formally*



Between a barrage of digital content and a labyrinth of societal expectations, the category is understandably complex for a MiMi. Even when they do find a look they could potentially adopt, short-form content isn't the ideal way for them to learn how to recreate it. 15-sec videos aren't quite enough to impart instruction, after all.

“Instagram reels are too short,” laments a MiMi from Raipur. Her many attempts at recreating looks from Instagram proved challenging because technique is not something the format truly helps deliver. “It’s fun to watch, but I can’t learn how to apply highlighter without step-by-step instructions.”

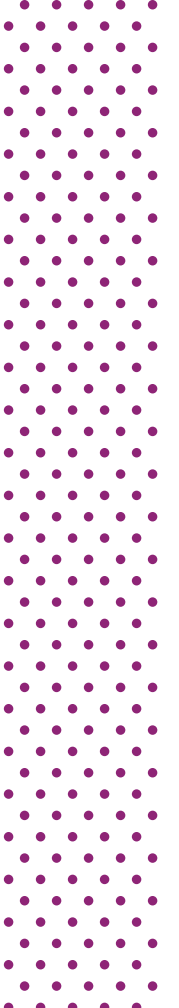
YouTube videos do offer a considerable quantum of how-to content with more detailed approaches to application techniques and methods. But these videos lack the interaction and contextualisation that a beginner truly needs.

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**The MiMi finds it more useful to attend make-up courses and workshops led by experts within their social context, to learn the correct application techniques relevant to them.**

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These interactive programs are abundant in Middle India, with multiple beauty schools & trainers within every neighbourhood.



So what about beauty influencers on social media? Turns out, they play a markedly smaller role in impacting the adoption of new brands, trends and techniques than we had initially thought. Beauty influencers showcase multiple trends from across the globe while focusing on aesthetic impact for digital content. The MiMi, on the other hand, seeks social contextualisation and customisation to help her hone her skills. What good is learning how to apply graphic eyeliner, if she can never use it outside of her home? Most of the young women we spoke with would not even consider adopting a trend that edgy.

Offline beauty courses allow her to understand make-up in a far more intimate way, and get personalised advice & attention to help ensure she wears it well. We also spoke to the trainers at these classes to gather their perspectives, and they echoed similar sentiments.

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**“Young girls might be going through a lot of information online, but they often get confused and don’t understand what to do. Hence we organise makeup workshops which simplify it and give them information that will be useful for them like how to contour, use highlighter, put the correct amount of foundation. It is easy to learn step-by-step here.”**

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A primary USP of these courses is the “realness” of them all. Like the parlour aunty, these trainers bring a combination of expertise and hyperlocal societal context. The MiMi is hence able to receive inputs not just on correct technique, but also on the most suitable choice of products & shades for her needs. In this way, the home-schooling that started with her mother and aunts introducing her to beauty is formalised through these courses and training sessions.

3.

# A journey of *cautious exploration*

The MiMi's overarching approach to beauty is minimal and uncomplicated. But she is still fascinated by the category, and also cautiously excited to try new products and experiment – within her social boundaries, of course.

There is a certain amount of scepticism and caution that tints these experimental buys. The MiMi values value; she isn't about to spend a large amount on a product she isn't completely comfortable with. Whether it's the risk of skin sensitivity or a less-than-pleasant reaction from her social circles, she is wary of the flip sides to experimenting with new brands or products.

Minis, testers & travel-size SKUs are a big hit with this audience when it comes to trying a new skin ingredient or product. They allow the MiMi the flexibility to try out a new product without committing to a particularly large quantity of it or shelling out full price. In this way, she can sample a new shade or formula to see if it suits her needs, thereby intelligently fine-tuning her own signature look.





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**“Before purchasing anything I buy the mini or trial pack if it is available. It is the best way to see if the product is right for me before buying the bigger pack.”**

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The MiMi also tends to stick to brands that she has previously used or seen her trusted circle of women use. She is unlikely to experiment with a new brand, especially in the absence of a go-ahead from someone whose opinion she values. If her routine currently includes a Lakme moisturiser, she will look to the same brand when she wants to add a serum to her skincare. The way she sees it, sticking to multiple products from the same brand means that they're more likely to pair well together and minimize the risk of any adverse reactions.

Beyond what the MiMi shops for, her cautious mindset also trickles down to how she shops. Despite belonging to a generation of digital natives, she views the multiplicity of online beauty platforms with some apprehension.

While the e-commerce platforms do offer a wider variety, great discounts and undeniable convenience, they lack the reassurance that an offline purchase experience offers. Tales of inauthentic or contaminated products, horror stories of missing prepaid orders, and the stress of discovering that the shade you ordered doesn't match the picture – only to be rendered unreturnable the moment you tried that swatch – are all looming factors that cause the MiMi to keep the e-commerce experience at arm's length.

The brick-and-mortar experience offers more reassurance. She can ensure that products are authentic and exactly what she's looking for. After all, this is a category where the slightest variation in shade or texture can be a deal-breaker.

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**“For foundations and lipsticks especially, I can check the colour properly – online it shows something else and the product shade turns out to be something else.”**

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The MiMi's beauty shopping is also guided by the strength and importance of interpersonal relationships. She is far more comfortable visiting her preferred beauty retailer, often even forging a friendship with the beauty expert or salesperson there. Building that relationship makes the process feel less transactional. That personal interaction also allows her to try on shades, and check for product authenticity & shelf-life before she makes her purchase decisions. Over time, it translates to more personalised recommendations, and may even score her some free samples or testers. These softer benefits are considerably more valuable to the MiMi than popular e-commerce perks like next-day delivery.

Shopping offline also makes the entire process more intentional, as opposed to the all-too-real risk of impulse purchases on online platforms. For the value-conscious MiMi, visiting a store to touch & feel the product rather than simply going from browse to cart in a few clicks makes the experience more mindful. Her purchases are resultingly more purposeful, and less likely to contribute to seldom-used dressing table clutter.

# Our *key learnings* & *takeaways*

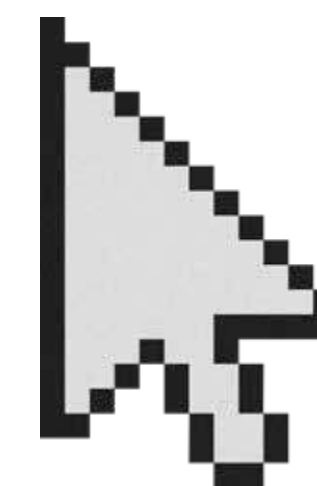
As the Indian D2C ecosystem grows exponentially, metro cities are no longer the only audiences. It's important for founders, investors & marketers alike to hence develop a deeper understanding of how behaviours vary across demographics.





# *Social circles* > Social media

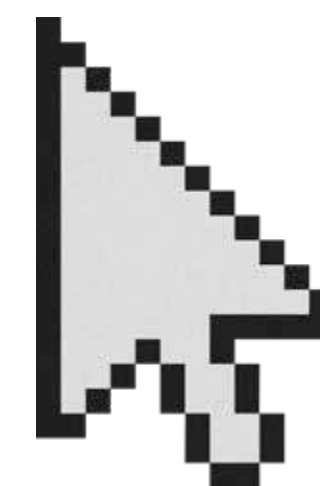
The influencers of small-town India aren't on Instagram with 100k followers – they're closer home. From her mother to the neighbour ladies to the local parlour aunty, the MiMi turns to a closer, trusted circle to better understand and explore the beauty category. Word-Of-Mouth is still the strongest testimonial, and societal context & realities cannot be ignored.





# Occasions are *binary*

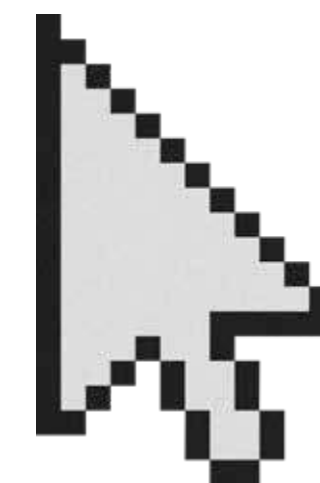
Unlike metro messaging that celebrates various looks for the most nuanced occasions, make-up is treated in a binary fashion in small-town India. Looks are either daytime or evening/special occasion, with the distinctions & details being heavily influenced by societal norms.





# *Offline influence* can build online adoption

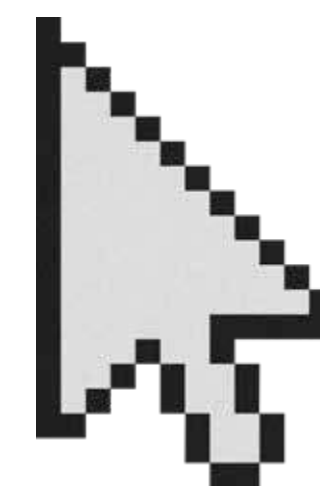
The small-town Indian consumer is cautious and value-conscious. An offline purchase experience offers the flexibility to sample product shades & textures in person, as well as verify the authenticity of products before purchase.





# *Redesign*, not re-purpose

Small-town India does not actively engage or act on re-purposed cosmopolitan content. For the MiMi, it is vital to communicate with context and relatability. Brands & creators need to speak to their realities, as opposed to simply adapting metro messaging.



# Epilogue

It's exciting times ahead for the Indian startup ecosystem. The D2C sector, in particular, is potentially building for over a billion users across categories. For investors and founders alike, the strongest arrow in our quiver is a deep understanding of the consumer and their needs & wants. As TAMs expand and relevance increases, there has never been a period of greater potential for the Indian D2C sector.

The purpose of this research and report is to explore consumer behaviours and triggers amongst non-metropolitan markets, as they are poised to become a significant portion of the adoptive consumer base.

# About *us*

Spring Marketing capital is a skin-in-the-game marketing value-added investment firm that looks to invest in consumer-facing startups. We aim to unlock business value through timely marketing intervention, and help our partner brands become the market-leading and defining brands in their respective categories.

An integral part of our life is dedicated to spending time with consumers to understand their habits, make sense of their attitudes and predict their behaviours.

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Spring