Mindlink

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CATEGORY STUDY · BEAUTY AND MAKEUP · INDIA

# Makeup buyers decide late, and they decide on proof

1,582 makeup buyers profiled across 262 cities and 32 states, in Hindi and in English, on where they buy, how they find what is new, what makes them switch and what earns their loyalty. Almost nobody in this category buys on sight, which means almost every purchase is still winnable.

| 1,582 | 262 | 5 | 105,000+ |
|---|---|---|---|
| profiled buyers | cities across 32 states | behaviours mapped | on the MindLink panel |

**The launch moment sells almost nothing in this category. Formulation and expert advice drive 66.5% of all switching, while celebrity collaboration moves 4.9%.** Only 9.2% buy a trending product on sight. The gap between seeing and buying is where this market is won.

### WHAT WE ASKED

Five questions on purchase channel, discovery, switch triggers, loyalty and trend response, fielded to the MindLink panel in Hindi and in English and pooled into one national sample.

### HOW TO READ THIS

Base is 1,582 buyers answering all five questions. The sample is 53.5% male, 41.2% aged 35 or over and 64.7% non-metro. Every figure is a share of the whole sample.

### WHAT EVERY RESPONDENT CARRIES

A full profile against the same eight mindsets used across 30+ MindLink categories, so any slice of this sample is already readable.

FINDING 01

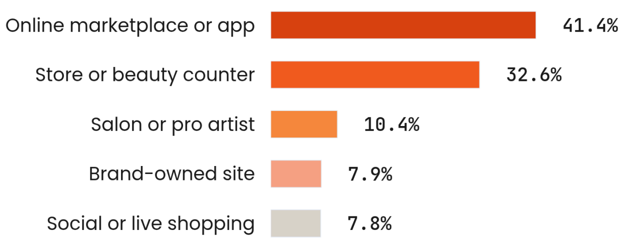
## Marketplaces and shop shelves carry three purchases in four

74.0%

of purchases run through marketplaces and physical stores. The app leads at 41.4%, the shelf follows at 32.6%.

- **A small route carries outsized authority.** Salons take 10.4%.
- **Owned channels serve, they do not sell.** Brand sites and live shopping reach 7.9% and 7.8%.

Where buyers purchase makeup




### WHAT TO DO WITH THIS

Split the budget the way the market splits: reviews and listings for the marketplace, testers and staff for the shelf.

FINDING 02

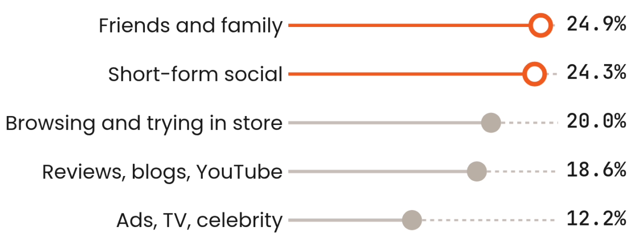
## No discovery route reaches a quarter of this market

24.9%

name friends and family as their route to new makeup, the largest single answer. Nothing reaches a quarter of the market alone.

- **Short-form social sits level with word of mouth,** at 24.3%. Together they carry 49.2%.
- **The shelf and the review follow,** at 20.0% and 18.6%. Advertising trails at 12.2%.

How buyers first find new makeup




### WHAT TO DO WITH THIS

Plan for five routes. A launch that lands on creators alone reaches a quarter of the market.

FINDING 03

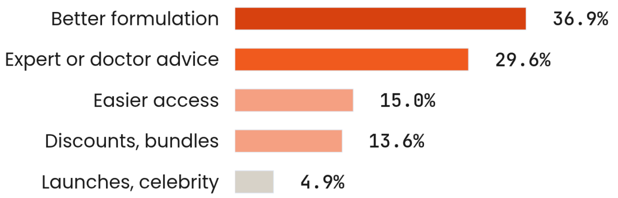
## Formulation and expert advice drive two thirds of switching

# 66.5%

switch brands or trade up for better formulation or expert advice. No other trigger comes close.

- **Celebrity and launch collaborations are the weakest trigger tested.** They move 4.9%.
- **Price and availability set a floor, not a decision.** Discounts reach 13.6% and easier access 15.0%.

Strongest reason to switch brands or trade up





**WHAT TO DO WITH THIS**

Put the money behind demonstrable performance and third-party expertise. Ambassadors carry reach, the claim has to carry proof.

FINDING 04

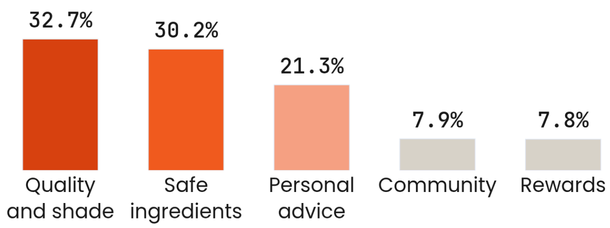
## Quality and ingredients hold loyalty, rewards barely register

# 62.9%

stay loyal for consistent quality and shade matching at 32.7%, or safe ingredients at 30.2%. Between them they hold the category.

- **Personal recommendations are the one programme worth building beyond the product.** They take 21.3%.
- **Perks buy very little here.** Rewards and community reach 7.8% and 7.9%.

What would make a buyer loyal to a brand




**WHAT TO DO WITH THIS**

Spend on formulation, shade range and ingredient transparency before another rewards tier.

FINDING 05

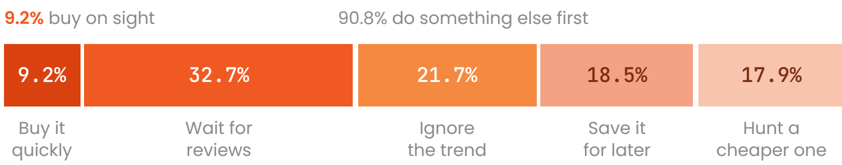
## Nine in ten do not buy the product they see trending

# 90.8%

do something other than buy when a product trends online. Only 9.2% buy it there and then.

- **Waiting is the default.** 32.7% hold out for reviews and wear tests.
- **Two hunt a cheaper version for every one who buys,** at 17.9%.

What buyers do when a makeup product trends online




**WHAT TO DO WITH THIS**

Budget for the review window rather than the spike. Wear tests, stock and a price answer have to be in place before the peak.

**THE THREE MOVES**

Three moves follow from the data, and none needs a larger budget: **put evidence where the buying happens**, on the listing and at the shelf; **plan across five discovery routes**; and **fund the review window rather than the launch spike**.

## The same media buy reaches one mindset and misses the other

**11.1**pp

separate Ambitious and Reformer buyers on advertising as a discovery route, at 20.7% against 9.6%. One is reachable by a media buy, the other is not.

**21.7**%

ignore viral trends outright, yet every one of them holds a firm view on what would earn their loyalty. No sales file contains this group.

**262** cities

across 32 states in eight weeks, in two languages, with no new panel build and no field team. Widening this read needs more of the same.

Base: 1,582 buyers profiled from 2,508 reached. Fielded 29 January to 24 March 2026 in Hindi and in English across 262 cities in 32 Indian states. Margin of error is about 2.5 percentage points at 95% confidence. Mindset figures are quoted only where the base reaches 150 respondents.