

DERMAWIN

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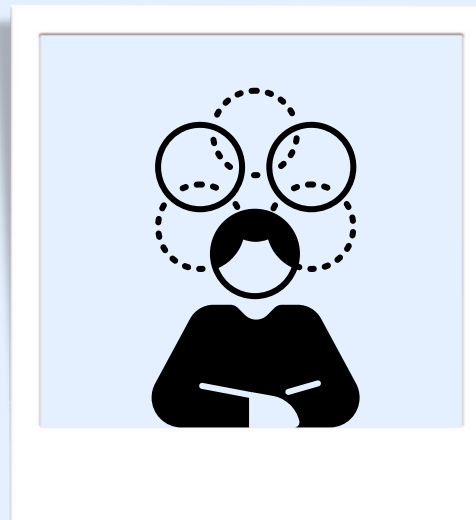
GRAD_{2.0}

Galderma Rising Achievers in Dermatology



Biluma's challenge is to bridge low consumer awareness & fragmented pigmentation solutions by building trust. The goal is to design a cost-efficient digital strategy that drives awareness, engagement and adoption.

SURVEY & FOCUSED INTERVIEWS



Demographics

- Survey of 100+ individuals
- 60% females & 40% males
- Age 18-45 yrs
- Tier 1 & Tier 2 cities
- Professionals & homemakers

USER PERSONAS

1. Derm-Deferrer (Trust doctors) View: Pigmentation = serious skin issue. Awareness: High (via dermatologist). Behavior: Only use prescribed creams (Biluma, Melalite, Piersoft). No OTC.	2. Results Hunter (Ingredient-Savvy) View: Dark spots, melasma = beauty/glow concern. Awareness: High (search terms like niacinamide, kojic acid). Behavior: Rotate serums (Plum), follow YT/Instagram.
3. Natural-Leaning Pragmatist (Safer) View: "Kala daag" marks. Awareness: Medium (don't know hyperpigmentation). Behavior: Use aloe vera, turmeric, sandalwood, creams (Vicco).	4. Post-Acne Youth View: Pigmentation = acne marks/scars. Awareness: Medium-Low (know as acne marks). Behavior: Affordable serums/creams (<₹500), follow peers, dermatologist.

SOCIAL LISTENING

- **Discovery:** Instagram, YouTube and Nykaa
- **Purchase:** Digital-first via Amazon, Nykaa, Flipkart.
- **Reinforcement:** Strengthened through dermatologist prescriptions and peer recommendations.

Consumer Vocabulary:

- Dark spots
- Tanning
- Acne marks / scars
- Skin dullness
- Kale daag (vernacular)



INSIGHTS



Trigger:

Acne marks, tanning and dark spots are the biggest emotional triggers, tied to confidence and appearance. Consumers act when these concerns start affecting their self-image.

Discovery:

Social media and peers dominate the discovery phase. However, there is too much noise and low clarity—consumers are unsure what genuinely works for pigmentation.

Validation:

Dermatologists and trusted voices become the credibility bottleneck. Unless endorsed by a derm or backed by strong ingredient science, products struggle to gain trust.

Purchase:

Decisions are made online or offline but often at a dermatologist's push. Pure OTC traction is weak because consumers hesitate to experiment without professional validation.

Post-purchase:

Consumers expect quick visible results. If outcomes aren't noticeable within 4–6 weeks, they drop off, leading to low stickiness and poor repurchase rates.

DERMATOLOGIST OPINIONS

1. Triggers & Misconceptions

Pigmentation often mistaken for tanning/fairness.

2. Treatment Timelines

Visible change needs 6–12 weeks; drop-off by week 4.

3. Product Positioning

Biluma = safe, long-term use.

4. OTC Challenges

Risk of misuse & fairness confusion.

5. Consumer Stickiness

Brand-hopping due to slow results.

6. White Space

BW clinical & natural OTC.

CUSTOMER JOURNEY

AWARENESS

- Dark spots, melasma, or underarm marks often mistaken as tanning/dullness.
- First attempts = home remedies, fairness creams, DIY packs.

SEARCH

- Consumers Google "dark spot cream," follow YT/IG hacks, scan Nykaa reviews.
- Explore DIY + OTC serums (Niacinamide, Vitamin C, Kojic, Arbutin) alongside derm treatments.

REPUTATION

- Consumers validate choices through reviews, peer feedback, before/after results, dermatologist advice.
- Derms = highest trust source; endorsements strongly influence.

CONVERSION

- Purchases split: chemists (if prescribed) vs Amazon/Nykaa/Flipkart (if OTC).
- Price sensitivity + discounts drive the final decision.

PURCHASE FUNNEL



- 175M with pigmentation concerns
- 80M actively seeking solutions
- 40M aware of OTC/Derm products
- 12M derm consultations / 25M OTC consideration pool
- 8–10M actual OTC buyers
→ 1–1.5M Biluma users & ~0.5M repeat users

FUNNEL-BASED CONSUMERIZATION STRATEGY FOR BILUMA

Awareness (TOFU – Top of Funnel)



Strategy

Biluma will drive awareness with **relatable language** like ‘dark spots, tanning, acne marks’ through reels, carousels and YT explainers. Credibility comes from **dermatologist and influencer tie-ups**, while **paid media** boosts reach. **SEO + SEM** dominance via a ‘Pigmentation Knowledge Hub’ and **Google Search Ads** will capture high-intent demand.

Execution

‘**Not Just Dark Spots**’ campaign highlights how pigmentation affects daily confidence, supported by short-form videos on **Instagram** and **YouTube**. Dermatologist-led myth-busting reels position **Biluma** as the science-backed solution. **Influencers** across **Tier 1 & 2** share authentic journeys to build trust. A branded “**Spot-Free September**” drive fuels engagement, while **SEO/SEM** with retargeting captures high-intent consumers and drives conversions.

Key Performance Indicators

- Key awareness KPIs will include **reach and impressions** across Instagram, YouTube, and Meta Ads, along with video views and completion rates on reels and YouTube Shorts. Success will also be measured through **hashtag adoption** (#BilumaSkinReset, #SpotFreeConfidence) and **brand recall** lift tracked via digital brand lift surveys.

Engagement (MOFU – Mid of Funnel)



Engagement will be driven through interactive **tools like quizzes, AR filters & guided digital journeys**, complemented by dermatologist & influencer-led webinars that provide expert credibility. Additionally, **micro-influencer reviews and progress diaries** will showcase authentic results, fostering trust & relatability among consumers.

Biluma will engage users with interactive quizzes that recommend the right product and an **AR ‘Fade the Spot’ Instagram filter** to make results tangible. Influencers will share 6–8 week progress diaries with authentic before-after journeys across reels and vlogs. **Skin health webinars co-hosted by dermatologists and influencers** will educate audiences, break stigma and set realistic timelines for results.

- Engagement KPIs will track **click-through rates** on influencer and dermatologist reels, quizzes, and AR filters, along with **overall engagement rates** such as likes, comments, shares, and saves. Additional measures include **time spent on content** like dermatologist Q&A webinars and carousel guides, as well as participation through AR filter usage, quiz completions, and WhatsApp signups.

Conversion (BOFU – Bottom of Funnel)



Boosting conversions will be through optimized **e-commerce content**, easy access to trial packs and samples, and strong **CTAs** in retargeting ads, further reinforced by **influencer** and **dermatologist-linked** purchase cues that build trust and urgency to buy.

It will drive conversions through smart sampling with affordable mini packs on e-com platforms to reduce trial barriers. **Influencer-led discount** codes will push purchases with **measurable ROI**, while dermatologists provide personalized **CTAs in reels**, encouraging immediate adoption. **Retargeting ads** will re-engage high-intent audiences who watched content or visited the site but didn’t purchase, nudging them to convert.

- **Performance KPIs** will focus on the number of trial pack purchases tracked via **e-commerce & QR codes** at dermatology clinics & pharmacies, with conversion rates from engagement to purchase. Additional metrics include **influencer & dermatologist** code redemptions, as well as **cost per acquisition (CPA)** to measure efficiency.

Retention (Post-Purchase Loop)



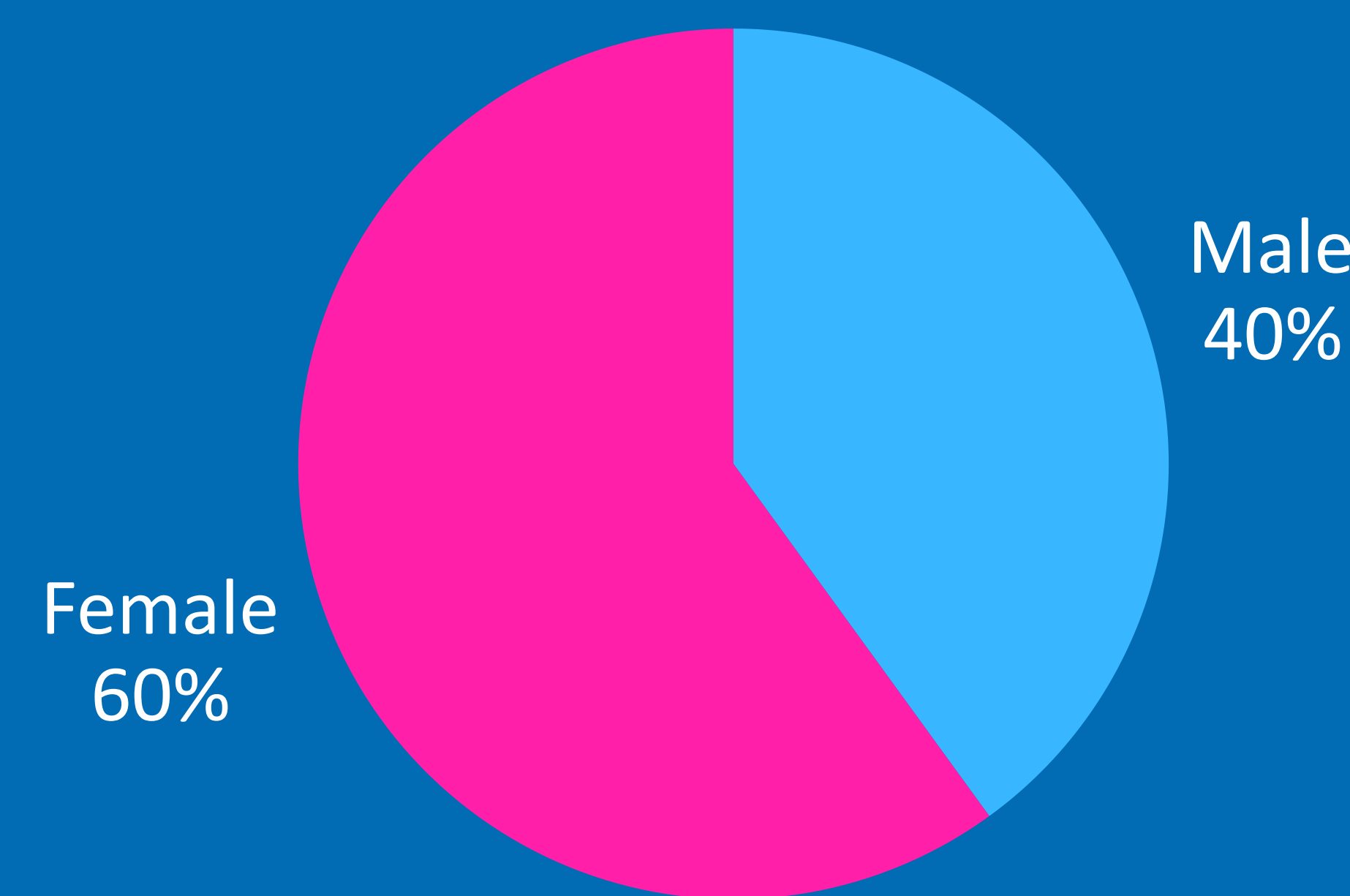
There will be strengthened experience with a **progress-tracking bot/app** that keeps users engaged, complemented by a loyalty and referral program to drive repeat purchases, and a **UGC-driven community** that fosters trust, advocacy, and long-term **brand connection**.

This will drive **long-term engagement** through a **WhatsApp Skin Tracker** that highlights weekly progress via AI. A community hub, **#BilumaSkinStories**, will showcase real user journeys for **social proof**. Loyalty rewards such as free derm consults after 3 months will encourage adherence, while timely nudges at Weeks 3 and 6 will keep users motivated and sharing progress.

- **Retention KPIs** will track repeat purchase rates, along with percentage of consumers enrolled in the **WhatsApp skin tracker**. **User-generated content** submissions, such as before-and-after photos and **testimonials**, will serve as indicators of engagement & advocacy, while the churn rate will help **measure drop-offs** after the first purchase.

ANNEXURE 1.1

Demographics



Market Growth

Market Segment	2023 / 2024 Value	Forecast (2030–2035)	CAGR
India Hyperpigmentation Treatment	~US \$27.1 million	~US \$49.6 million by 2030	~9%
Broader Skincare Market (India)	US \$8.4–8.78 billion	US \$17.1–17.7 billion by ~2033	~7.8–8.4%

Primary Research Insights (based on initial survey responses)

- **Purchase Triggers:** Top concerns: Acne marks and tanning dominate as main drivers of pigmentation care purchases.
Implication: Campaigns must position Biluma strongly around acne post-marks and sun-tan repair, not just melasma (which is seen as more clinical).
- **Awareness & Products Tried:** Respondents are already exposed to dermatologist-recommended brands like CeraVe, Cetaphil, and Piersoft.
Implication: Biluma must fight for share-of-voice in the dermatologist channel, while also ensuring visibility in OTC/self-care discovery (Instagram, YouTube, friends).
- **Trust Sources:** Dermatologists remain the most trusted authority, but friends and influencers are rising secondary channels.
Implication: Biluma should balance dermatologist-endorsed credibility with peer-driven relatability (dual strategy).
- **Budget Sensitivity:** Willingness to spend ranges ₹1000–₹2500 per month on pigmentation care.
Implication: Biluma’s price point is competitive, but bundling (serum + cream) or subscription models can maximize consumer lifetime value (CLV).
- **OTC vs Derm-Prescribed:** Strong preference for dermatologist-prescribed products, signaling low confidence in OTC pigmentation solutions.
Implication: Biluma must leverage medical backing while gradually building direct consumer trust via content and testimonials.
- **Content Consumption:** Reels, Lives, and Word-of-Mouth dominate as discovery and engagement formats.
Implication: Campaigns should lean into Instagram Reels + Live Q&As with dermatologists, amplified by community-driven storytelling.
- **Language Preference:** Current responses indicate English as the preferred mode, but to scale, regional language content (Hindi, Tamil, Telugu) will be critical.
Implication: Biluma must build vernacular-first micro-campaigns for Tier-2/3 penetration.

ANNEXURE 1.2

Reviews - What customers actually say

- **Biluma (1mg)** — 4.1/5 from 726 ratings; users praise pigmentation control; multiple comments on small tube/overpriced, and mixed comparisons vs Cosglo. 1mg
- **Biluma Advance Lotion (PharmEasy)** — user notes “works after ~4 weeks” but mentions a pump failure; other reviews call it “effective.” PharmEasy
- **Demelan (1mg)** — 4.0/5 from 1,079 ratings; “patience is the key,” “use with sunscreen,” with both strong positives and some “not worth it” outliers. 1mg
- **Kojivit Ultra (1mg)** — 4.2/5 from 608 ratings; themes include slow results (1–2 months) and oily feel for some users; others call it effective/value. 1mg
- **Minimalist TXA 3% (Nykaa)** — 4.3/5 from ~9,500+ ratings; many state visible fade in ~3–4 weeks (some in ~22 days), others after multi-month use; gentle/lightweight repeatedly noted. Nykaa
- **The Derma Co 2% Kojic (Nykaa)** — 4.3/5 from ~30k ratings; results in 4–6 weeks reported; “takes time” but lightweight/watery texture valued. Nykaa
- **L’Oréal Glycolic Bright (Nykaa)** — ~25k ratings; instant glow/2-week brightening alongside “a bit sticky/heavy” mentions. Nykaa
- **Re’equil Skin Radiance (Nykaa)** — 4.2/5; visible change in ~10 days to 3 months depending on use; non-greasy/“oily-skin friendly.” Nykaa
- **Garnier Vitamin-C (Nykaa)** — numerous reviews cite results in ~1 week; gel formats praised as non-greasy/absorbs fast. Nykaa+2Nykaa+2
- **Olay Vit-C/Niacinamide (Nykaa)** — users advise 2–4 weeks for glow/even tone; positioned premium (price comments & heavy promo/discounting visible). Nykaa+2Nykaa+2Nykaa Man

Average time-to-results (days) from explicit mentions:

- **Garnier** ≈ 5–6 (fast “week-one” claims) Nykaa
- **Olay** ≈ ~13–28 (2–4 weeks) Nykaa
- **L’Oréal Glycolic** ≈ ~14–16 (2 weeks common) Nykaa
- **The Derma Co** ≈ ~45 (4–6 weeks) Nykaa
- **Re’equil** ≈ ~10–90 (wide spread; 10-day early glow, multi-month spot fade) Nykaa
- **Minimalist TXA** ≈ ~22–90 (3–4 weeks typical; deeper scars in months) Nykaa
- **Kojivit Ultra** ≈ ~45–60 (slow for some; oily feel for a few) 1mg
- **Biluma Advance** ~28 (user-stated 4 weeks) + Biluma Cream (no consistent timeline in snippets). PharmEasy1mg

ANNEXURE 1.3

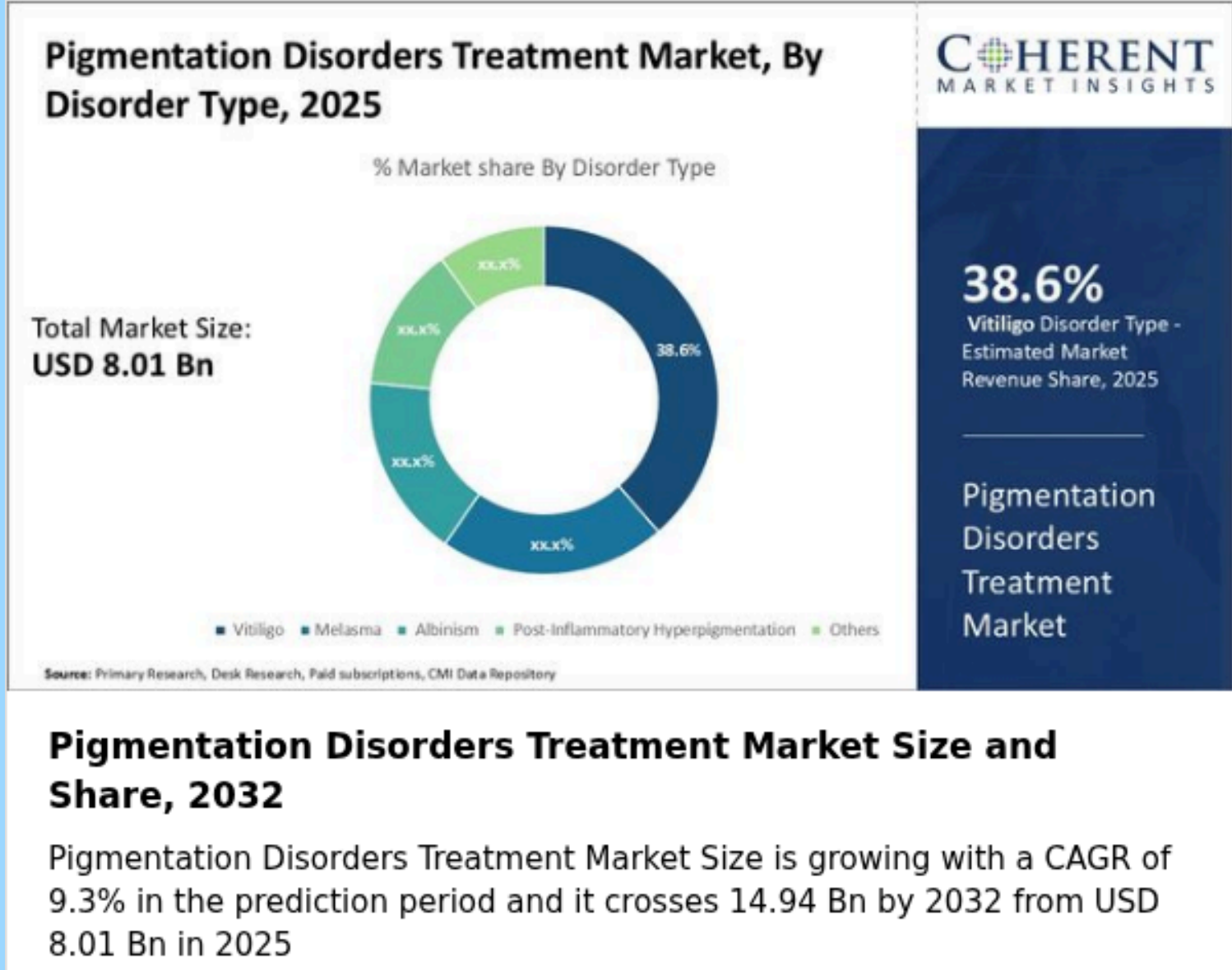
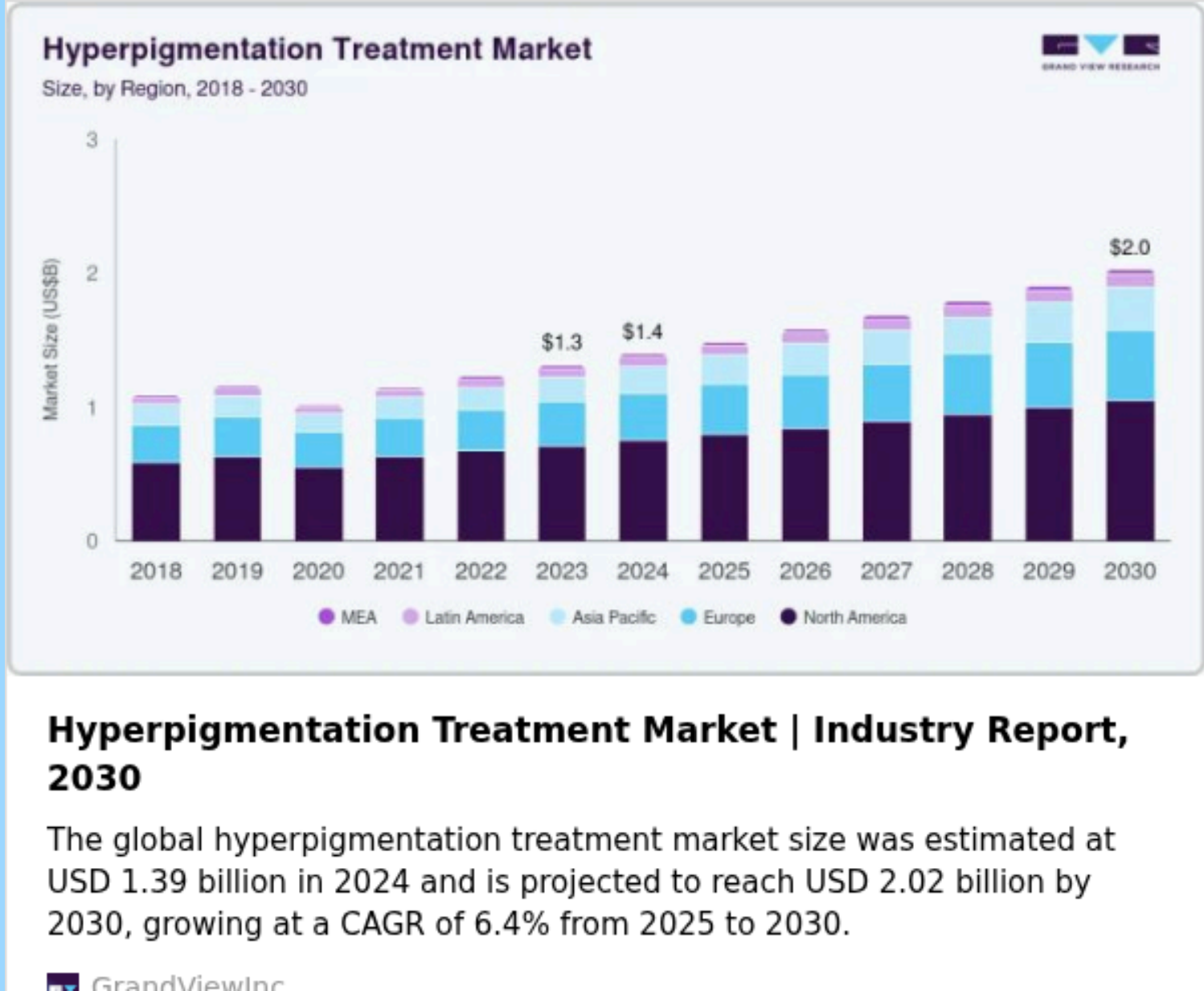
Must-Win Insight	Why It’s Critical Now	Year 1 Moves for Biluma
1. Category Confusion (Tan vs. Pigmentation)	If consumers don’t even know they <i>have pigmentation</i> , they’ll never enter Biluma’s funnel. Today, many treat it as dirt/tan → wasted trials.	Launch “ Spot the Spot ” awareness campaign (quiz, reels, influencer explainers). Position Biluma as <i>the pigmentation expert</i> , not just another “brightening” cream.
2. Unrealistic Quick-Fix Expectations	Early dropout = churn + negative word-of-mouth. Pigmentation results take time, but consumers don’t wait.	Redesign promise: “ Glow in 2 weeks, spots fade in 8+ weeks. ” Use WhatsApp nudges & UGC diaries to show staged progress.
3. Trust Gap (Derm vs. OTC)	Derm recommendation is Biluma’s moat. If ignored, it risks looking like “just another cream” in crowded OTC space.	Dual-anchor comms: “#1 Derm Recommended” + “Safe for Daily Consumer Use.” Blend authority with accessibility.
4. Price/Trial Risk Barrier	At ₹600+, many hesitate to buy without proof. This blocks first-time trials in Tier 2/3.	Introduce ₹99–149 trial minis/sachets online + offline. Bundle with SPF to drive compliance and repeat buys.

Social Listening Snapshot (Ingredients Lens): What consumers talk about

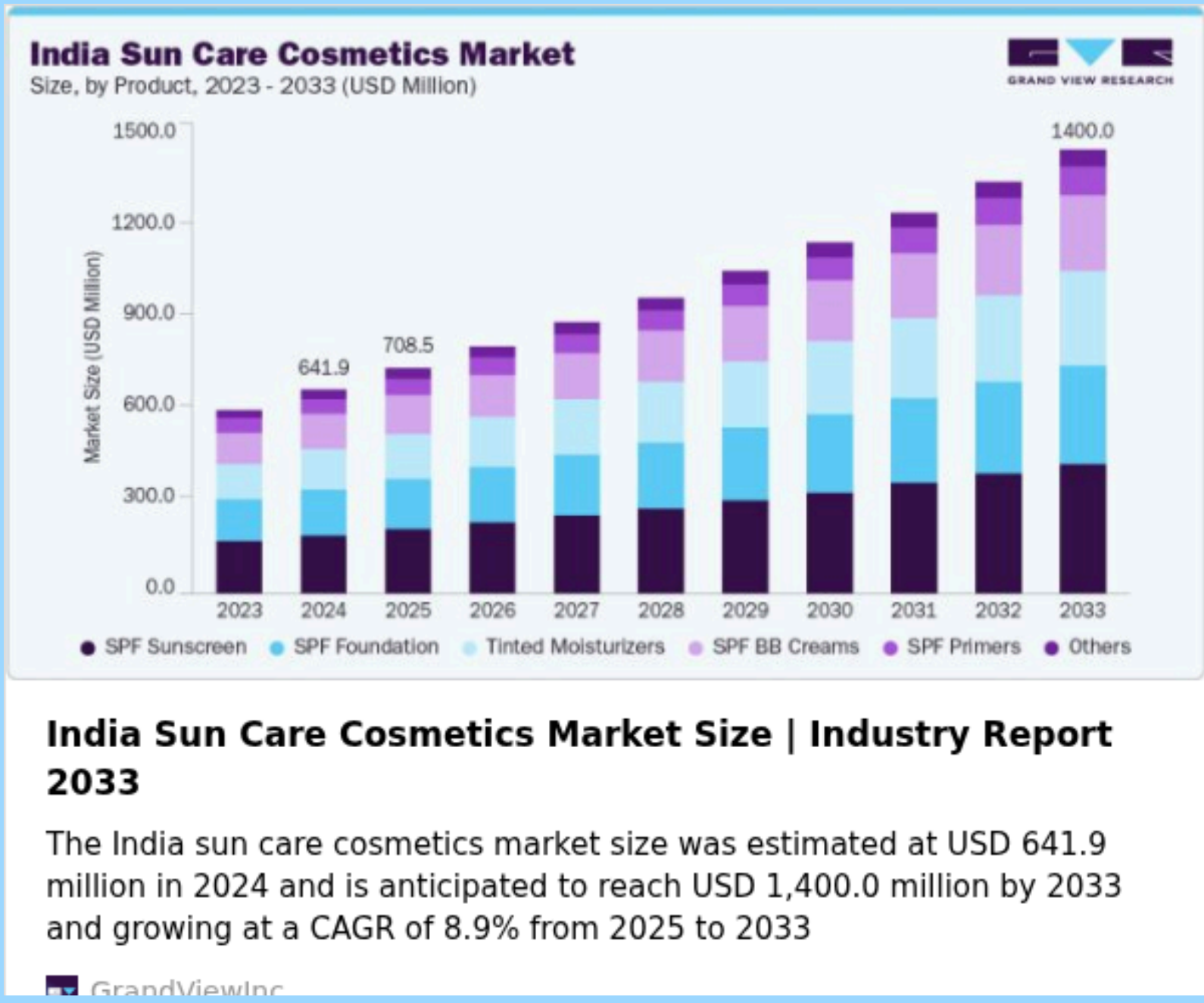
Theme	What consumers hear now	Ingredient link to Biluma
Tranexamic Acid hype	Trending as the “new solution” for melasma/dark spots; strong traction on IG & YouTube.	Biluma doesn’t have TXA → need to educate that Kojic + Arbutin + Vit C combo is equally derm-backed for pigmentation.
Vitamin C for radiance	Consumers expect fast brightening, but many complain of irritation & oxidation.	Biluma can claim stable Vit C derivative + soothing actives (Allantoin, Shea Butter) → “brightness without burn.”
Niacinamide acceptance	Widely trusted for barrier support & tone correction; often seen as safe vs harsher actives.	Biluma already includes Niacinamide → can lean on “derm-trusted, gentle daily repair.”
Kojic Acid	Mixed chatter: seen as effective but concerns about irritation & stability.	Biluma combines Kojic Acid + Glycolic Acid in controlled % with emollients → address irritation fears.
Arbutin / Licorice	Positioned as “natural alternatives” for pigmentation. Consumers see them as safer than hydroquinone.	Core to Biluma → can be hero-ed as “gentle, plant-derived actives” with visible results.
Hydroquinone fear	Doctors/influencers warn against HQ misuse, “don’t DIY steroid creams.”	Biluma is HQ-free → strong differentiator: “results without hydroquinone risks.”
Underarm darkening	Friction, shaving, sweat discussed; people look for gentle lightening.	Biluma’s Licorice + Niacinamide + Shea Butter fit this “sensitive-area safe” narrative.

ANNEXURE 1.4

Global Pigmentation & Skincare Context



Market Size and Growth Data



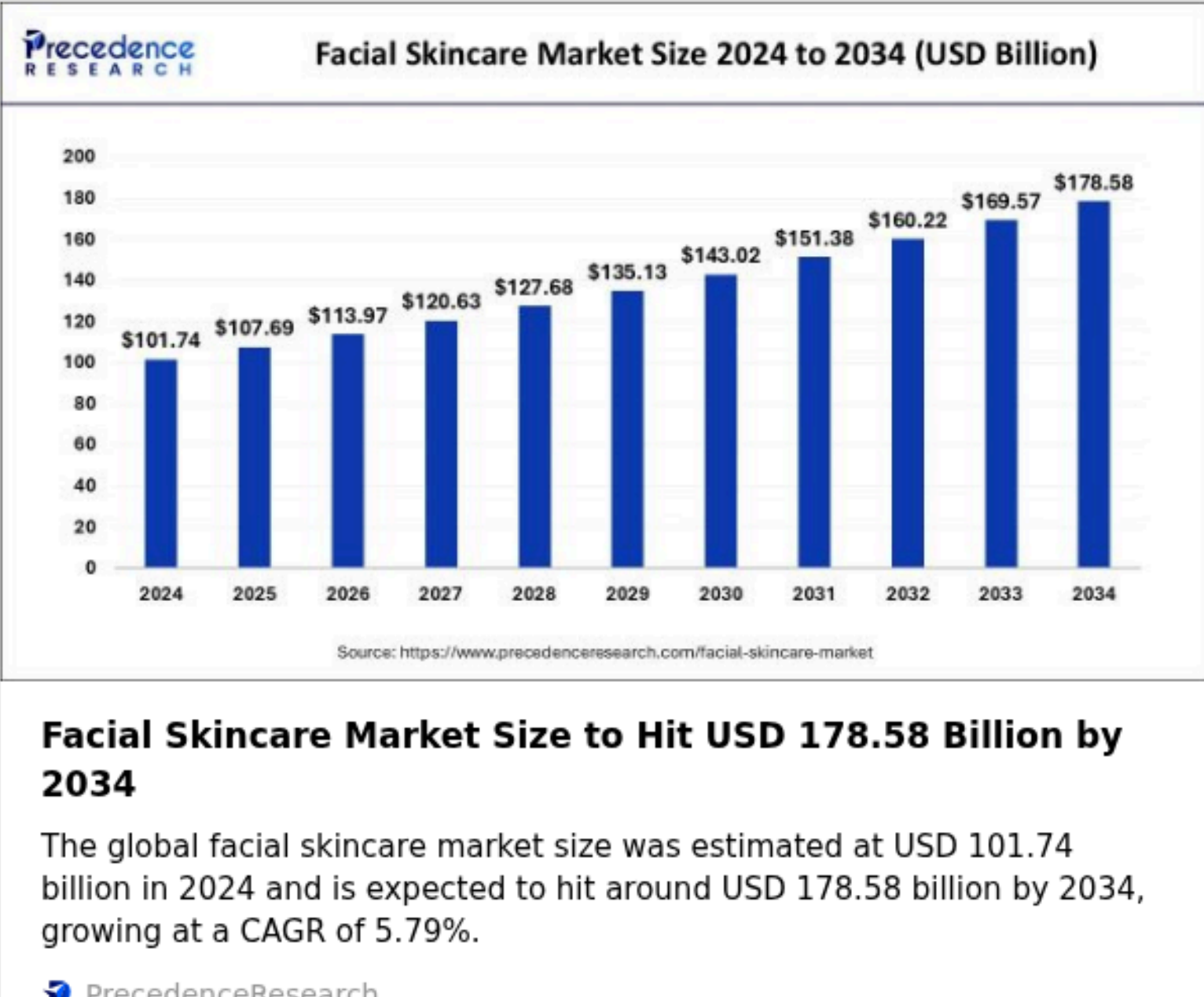
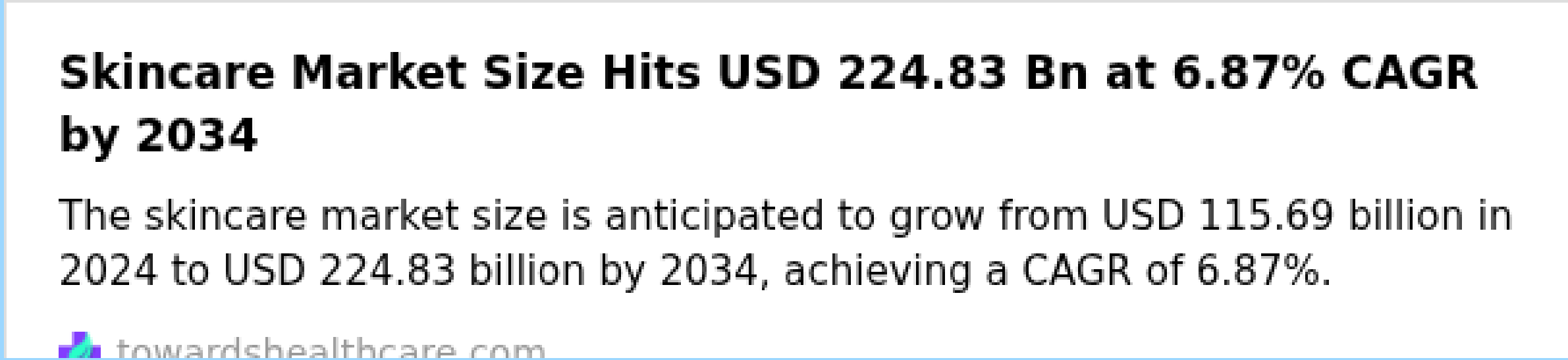
India Hyperpigmentation Disorders Treatment Market Size, Growth Outlook...

RESEARCH

India Hyperpigmentation Disorders Treatment Market projected to grow at 7.141% CAGR, reachin...

MRFRresearch /

Broader Skincare & E-commerce Trends



E-commerce in India

The e-commerce in India was \$147.3 billion in 2024, with 18.7% CAGR through to 2028 which will be further fueled by the technology innovations (5G ...

Wikipedia

Biluma Review Sources

Biluma Advance Night Cream Reviews Online

Read genuine reviews of Biluma Advance Night Cream by verified buyers at Nykaa.com. Shop for 100% authentic products from Nykaa.com.

Nykaa /

Biluma Advance Skin Brightening Face Wash Reviews Online

Read genuine reviews of Biluma Advance Skin Brightening Face Wash by verified buyers at Nykaa.com. Shop for 100% authentic products from Nykaa.com.

ANNEXURE 1.5

Current Competitor Analysis

Competitor	Format	Price (₹)	Customer Reviews (Summary)
Demelan (Glenmark)	Cream (20 g)	~₹400–₹550	Positive for pigmentation fade; some dryness/irritation noted.
Melaglow Rich (Abbott)	Cream (20 g)	~₹475–₹580	Praised for glow; reviews mention results are slow.
Kojivit Plus / Ultra	Gel	₹320–₹720	Affordable, accessible; results vary, some stickiness complaints.
Triluma	Cream (15 g)	~₹705–₹771	Fast visible results; frequent irritation/side effects flagged.
Melalite Forte (HQ 4%)	Cream (30 g)	~₹190–₹200	Cheap, effective; strong concerns over long-term HQ safety.
Clearz Plus / Glyco-6	Cream (15–30 g)	₹190–₹400	Effective for PIH & exfoliation; hydration varies.

Competitor Analysis - When it moves to OTC

Competitor	Format	Price (₹)	Customer Reviews (Summary)
Minimalist Tranexamic Acid Serum	Serum (30 ml)	₹617–₹649	Strong credibility; effective on PIH; some sticky feel complaints.
The Derma Co Kojic Serum	Serum (30 ml)	₹560–₹650	Good dark spot results; some sensitivity reactions.
Re’equil Skin Radiance Cream	Cream (30 g)	₹330–₹350	Gentle, effective; fragrance mentioned by some.
L’Oréal Glycolic Bright / Melasyl	Serum (15–30 ml)	~₹525 (promo)	Clinical feel; effective for spots; dryness on initial use.
Garnier Bright Complete Vitamin-C	Serum/Cream	₹195 / ₹370	Widely loved for affordability; mixed reviews on long-term efficacy.

Content strategy aligned to Biluma ingredients

Consumer trend	Biluma play (ingredient-led)
TXA buzz	Reframe: “Not just one molecule – pigmentation needs a multi-active combo. Biluma blends Kojic, Arbutin, Vit C, Niacinamide – clinically proven synergy.”
Vitamin C doubts	Educate: “Most Vit C oxidizes; Biluma uses a stable derivative, so glow stays consistent.”
Niacinamide love	Amplify: “#Niacinamide inside – supports barrier while correcting tone.”
Kojic concerns	Reassure: “Biluma pairs Kojic with emollients (Shea Butter, Allantoin) → gentle yet effective.”
Hydroquinone backlash	Position: “HQ-free, safe for long-term use.”
Underarm niche	Launch a “#BrightUnderarms Routine” campaign → lean on Licorice + Niacinamide story.