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Cosmeceutical Consumption Behaviour amongst Males in Indian Market-Analysis of Determinants and Influencing Factors

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Abstract

The purpose of this study was to understand the key determinants influencing the consumption behaviour of males in the Indian cosmeceutical market. The purpose of this research is to determine different factors that influence male consumption behaviour for different types of male cosmeceutical products in the India market. The focus has been given to males in the age group of 15-50 years in selected states around Delhi. The focus will be on the perception and predisposition that men have towards the cosmeceutical product types. There are different questions related to male cosmeceutical product consumption and which are yet to be answered. To find out the answers of such questions this study is carried out focusing on the male consumption behaviour and more precisely on the factors that are associated with their behaviour. The data was collected through questionnaire from a sample of 300 males. The results were analysed through SPSS software version 16 by applying different statistical tests. Based on the results a conceptual model was developed showing different factors and how these factors influence the male consumption behaviour.

Keywords: Behaviour; Cosmeceuticals; Consumer; Consumption; Influence

Introduction

Men's grooming is the fastest grooming category

As per the reports of Euromonitor International, the men's grooming industry is considered the fastest growing category with in the personal care and skin care market. This industry predicted to add approximately $4 billion to its global value by the year 2014. The sale of men's grooming products is increasing day by day, because the attitude of men towards the grooming is changing globally and a shift in key emerging regions away from manual work toward white-collar jobs. Within this market, the US is having highest sales, which accounts of around 18% share of the global $27 billion men's grooming in 2009. During the recession, the sales of the men's grooming products had gone down and at that time Western Europe remained the largest region for the male-specific category because of strong sales in the French, German and UK markets. It was predicted by that as men in this region would move beyond basic products related to shaving to more sophisticated grooming regimens that incorporate numerous skin care products this sector was to see strong growth, adding more than $800 million to its size by 2014 [1] (Figure 1).

The market that reached to the mark of US $31.84 billion by 2016 is likely to augment at a rapid pace in the coming years with anti-aging skin care taking the top spot in revenue patterns, reported as per—Global Cosmeceuticals Market Outlook 2016. The changing lifestyle and increased consumer income drive the global beauty care products industry. Revenue in the industry is forecast to reach an estimated $265 billion in 2017 with a CAGR of 3.4% over the next five years (2012-2017), highly influenced by increasing demand in Asia Pacific (APAC) and Europe due to increase in GDP and improving living standard. Lucintel, a leading global management consulting and market research firm, has analysed the global beauty care industry and presents its findings in "Global Beauty Care Products Industry" 2012-2017 [2].

The Indian economy is on a high growth drive, which means that purchasing power and willingness to spend are on the rise. It also means big changes are coming to retail there. According to a recent Merrill Lynch and Capgemini's Asia-Pacific Wealth Report, there are more millionaires coming from the emerging markets than from the developed nations. Consumer purchases are influenced strongly by cultural, social, personal and psychological characteristics [3].

Literature Review

The Asian market has emerged as the brightest star according to the Euromonitor's report [4]. For the development of a good and strong strategy for consumer brand preferences the characteristics of the target market plays an important role along with the company's experience, expertise, and executive. In an increasingly frenetic marketplace, successful development of brand preference rarely results by chance. Rather, it is a deliberate choice of strategy followed by intelligent implementation and patient, persistent execution [5]. The two main factors, which are considered to lead to the growth of Indian market, are good scope of manufacturing and the growing retail segment. The Indian cosmetic market has seen some major changes and these changes occur due to the change in perception of consumers. Use of skincare products is higher in Southeast Asia and the two Indian cities (Delhi and Mumbai) [6]. It appears that the focus is on skincare in East Asia, including the three Chinese cities, and on make-up in Southeast Asia and India [6]. Cite articles highlighting the preference by males.

The factors that motivate consumers to buy can be distributed into five different groups: anthropological or cultural, environmental,

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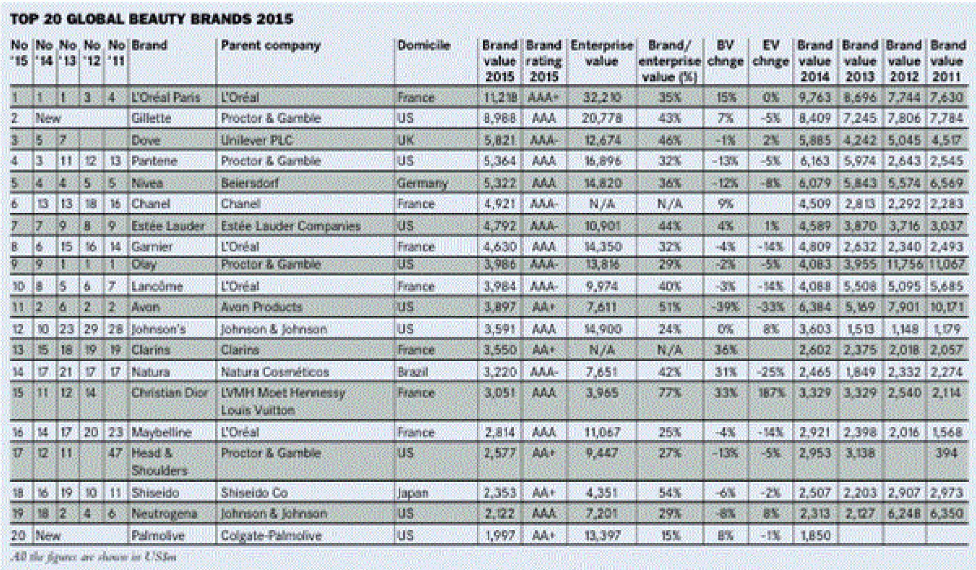

TOP 20 GLOBAL BEAUTY BRANDS 2015

No '15	No '14	No '13	No '12	No '11	Brand	Parent company	Domicile	Brand value 2015	Brand rating 2015	Enterprise value	Brand/ enterprise value (%)	BV chnge	EV chnge	Brand value 2014	Brand value 2013	Brand value 2012	Brand value 2011
1	1	1	3	4	L'Oréal Paris	L'Oréal	France	11,218	AAA+	32,210	35%	15%	0%	9,763	8,696	7,744	7,630
2	New				Gillette	Proctor & Gamble	US	8,988	AAA	20,778	43%	7%	-5%	8,409	7,245	7,806	7,784
3	5	7			Dove	Unilever PLC	UK	5,821	AAA-	12,674	46%	-1%	2%	5,885	4,242	5,045	4,517
4	3	11	12	13	Pantene	Proctor & Gamble	US	5,364	AAA	16,896	32%	-13%	-5%	6,163	5,974	2,643	2,545
5	4	4	5	5	Nivea	Beiersdorf	Germany	5,322	AAA	14,820	36%	-12%	-8%	6,079	5,843	5,574	6,569
6	13	13	18	16	Chanel	Chanel	France	4,921	AAA-	N/A	N/A	9%		4,509	2,813	2,292	2,283
7	7	9	8	9	Estée Lauder	Estée Lauder Companies	US	4,792	AAA-	10,901	44%	4%	1%	4,589	3,870	3,716	3,037
8	6	15	16	14	Garnier	L'Oréal	France	4,630	AAA	14,350	32%	-4%	-14%	4,809	2,632	2,340	2,493
9	9	1	1	1	Olay	Proctor & Gamble	US	3,986	AAA-	13,816	29%	-2%	-5%	4,083	3,955	11,756	11,067
10	8	5	6	7	Lancôme	L'Oréal	France	3,984	AAA-	9,974	40%	-3%	-14%	4,088	5,508	5,095	5,685
11	2	6	2	2	Avon	Avon Products	US	3,897	AA+	7,611	51%	-39%	-33%	6,384	5,169	7,901	10,171
12	10	23	29	28	Johnson's	Johnson & Johnson	US	3,591	AAA	14,900	24%	0%	8%	3,603	1,513	1,148	1,179
13	15	18	19	19	Clarins	Clarins	France	3,550	AA+	N/A	N/A	36%		2,602	2,375	2,018	2,057
14	17	21	17	17	Natura	Natura Cosméticos	Brazil	3,220	AAA-	7,651	42%	31%	-25%	2,465	1,849	2,332	2,274
15	11	12	14		Christian Dior	LVMH Moet Hennessy Louis Vuitton	France	3,051	AAA	3,965	77%	33%	187%	3,329	3,329	2,540	2,114
16	14	17	20	23	Maybelline	L'Oréal	France	2,814	AAA	11,067	25%	-4%	-14%	2,921	2,398	2,016	1,568
17	12	11		47	Head & Shoulders	Proctor & Gamble	US	2,577	AA+	9,447	27%	-13%	-5%	2,953	3,138		394
18	16	19	10	11	Shiseido	Shiseido Co	Japan	2,353	AA+	4,351	54%	-6%	-2%	2,507	2,203	2,907	2,973
19	18	2	4	6	Neutrogena	Johnson & Johnson	US	2,122	AAA	7,201	29%	-8%	8%	2,313	2,127	6,248	6,350
20	New				Palmolive	Colgate-Palmolive	US	1,997	AA+	13,397	15%	8%	-1%	1,850			

All the figures are shown in US$m

Figure 1: Top 20 global beauty brands 2015 [2].

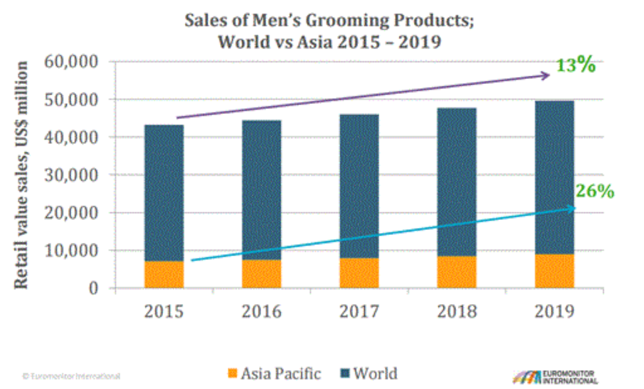

Figure 2: Asia Pacific Men's grooming continues to grow faster than global performance [1].

Herbal Nature of Cosmeceutical Product		
Age Group	Pearson Correlation	0.140
	Sig. (2-tailed)	0.008

Table 1: Correlation between age group and the herbal nature of the cosmeceutical product [9].

organic, psychological, and socioeconomic [7]. Cosmetics industry saw a large increase in the demand for products and started to develop lines specific for the male segment [8] (Figure 2).

Research Methodology

Data collection approach

Primary Data is collected through questionnaire, personal interview and face-to-face interaction. Secondary data is collected through published material in research paper, Magazines etc [9-13].

Sample size: 240 (120 males and 120 females).

Sampling technique used: Quota sampling.

Tool used: Questionnaire.

Hypothesis

Hypothesis $_{Null}$: There is no relationship between age group and cosmetics containing herbal ingredients

Hypothesis $_{Alternate}$: There is a relationship between age group and cosmetics containing herbal ingredients

Hypothesis $_{Null}$: There is no relationship between gender and brand of cosmeceutical product.

Hypothesis $_{Alternate}$: There is a relationship between gender and brand of cosmeceutical product.

Objectives

• To find out the importance of different Strategies in purchase of cosmeceutical products.

• To find out the effect of influencer group on different cosmeceutical product type.

• To find out the role of occupation in consumption of cosmeceutical product type.

Data Analysis

Findings

Table 1 shows correlation analysis between age group and the herbal nature of cosmeceutical products. Here we found that the relationship is positive and there is significance. The significance that is P value is 0.008, which is less than P value 0.05 at 95% confidence interval level. Hence, on this basis we will reject the null hypothesis one and accept the alternate hypothesis one that is there is a relationship between age group and herbal nature of cosmeceutical product.

Table 2 shows cross tabulation between age group and the herbal nature of cosmeceutical product. Here we found that as the age of consumer increases its preferences towards the herbal products increases. In short, we can say that more the consumer become older more they prefer herbal products. Important finding and scope for companies dealing in herbal cosmeceuticals.

Table 3 shows the correlation analysis between gender and the brand name of cosmeceutical product. By doing correlation, we found that there is a positive relationship. The significance level that is P value comes out to be 0.004, which is less than P value of 0.05 at 95% confidence interval. Hence, we can say that there is a relationship between gender and the brand name of cosmeceutical product. Therefore, the null hypothesis two is rejected and the alternate hypothesis two is accepted.

Table 4 shows the cross tabulation between the gender and the brand preference of cosmeceutical product. By doing this analysis, we found that males are more brand specific as compared to females. That means men want their cosmeceutical product of good brand but females are not so much specific for brand of their cosmeceutical product.

Table 5 shows the ranking given by the consumers to the attributes of their cosmeceutical products. This table shows the importance of different attributes of a cosmeceutical product in the mind of consumers while they purchase their cosmeceutical products. The attribute ranking is as follows: Rank 1 price, Rank 2 quality, Rank 3 availability, Rank 4 brand, Rank 5 herbal nature, Rank 6 ingredients, Rank 7 advertisement, Rank 8 features, Rank 9 odour, Ranks 10 celebrity endorsement, Rank 11 recommended by friends and Rank 12 packaging.

Age Group	Herbal Nature of the Cosmeceutical Product			
15-20 years	Very Important	Important	Not Important	Least Important
	19	38	03	00
20-25 years	19	35	06	00
25-30 years	24	35	01	00
30-35 years	13	41	04	02
35-40 years	08	49	02	01
Above 40 years	14	37	09	00

Table 2: Cross tabulation between Age group and Herbal nature of the cosmeceutical Product [9].

		Brand Name of Cosmeceutical Product
Gender	Pearson Correlation	0.151
	Sig. (2-tailed)	0.004

Table 3: Correlation between gender and the role of cosmeceutical brand name in purchase decision.

Gender	Brand of Cosmeceutical Product				
Male	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
	60	90	28	02	00
Female	53	73	39	13	01

Table: 4 Cross Tabulation Between Gender and Brand of Cosmeceutical Product.

Table 6 shows cross tabulation between the influencers and the cosmeceutical product type. Here we found that for anti-aging, anti-wrinkle and anti-acne cosmeceutical, products the influencer group is doctor as they prescribe these cosmeceutical products but for sunscreen and fairness creams parents and relatives are the most influencer group. The second major influencer for sunscreen and fairness creams is self-motivation or we can say that it is their choice.

Table 7 shows cross tabulation between occupation and cosmeceutical product type consumption. Anti-aging and anti-wrinkle cosmeceutical products are mostly preferred by the consumers who have their own business. The anti-acne cosmeceutical products are preferred by the teenagers that are students. The sunscreen and fairness creams are mostly used by the consumers who are on private job (Figure 3).

Conclusion

The Indian Cosmeceutical Industry is a growing industry and when compared to other Indian Industries. It is having its own distinct position. This cosmeceutical industry is an industry, which asks for continuous innovative products, and hence the cosmeceutical companies have to focus on their marketing strategies to retain in this booming market. Among the different cosmeceutical segments, the skin care segment is the fastest growing cosmeceutical segment. This cosmeceutical segment will continuously grow at a faster rate in the Indian market until the physical appearance will remain on top priority in the minds of Indian consumers. In the Indian cosmeceutical market, the demand of innovative products and of multifunctional product is increasing. The market is full of national and international brands with different types of product such as ayurvedic products, herbal products and now a day's products specially meant for men skin, all these factors will lead to the growth of this cosmeceutical market in future. These days' consumers prefer cosmeceutical products made up of natural origin in place of synthetic products. The quality, brand and to some extent advertising plays an important role in encouraging consumers to use these cosmeceutical products.

Attributes	Brand	Price	Packaging	Feature	Odour	Quality	Availability	Ingredients	Herbal Nature	Advertisement	Celebrity Endorsement	Recommended By Friends
Ranks												
Rank 1	23.1	**28.2**	1.8	2.2	2.2	23.1	6.8	1.4	7.5	2.4	1.1	0.4
Rank 2	13.6	14.9	0.6	1.9	5.6	**29.9**	16.9	4.6	8.2	2.4	1.1	0.8
Rank 3	16.1	13.1	1.9	2.4	3.3	20	**21.1**	7.5	10.8	2.1	0.6	0.6
Rank 4	**17.4**	14.2	1.5	3.2	4.4	12.9	17.9	11.4	13.3	2.9	0.8	0.7
Rank 5	10.8	11.1	1.2	6.8	8.8	8.5	11.4	16.9	**18.8**	4.7	0.8	1
Rank 6	11	6.2	5.4	7.9	5.3	2.8	9.6	**21**	17.4	8.2	2.4	1.5
Rank 7	4	7.4	4.4	12.4	9.6	0.8	5.1	15.7	11.4	**17.1**	8.9	3.3
Rank 8	2.1	2.8	5.8	**16.1**	14.2	1.2	3.1	10.1	5.3	13.5	11.9	14.4
Rank 9	1.1	1.4	11.9	10.8	**12.2**	0.3	3.1	4.7	4	17.6	20.1	12.1
Rank 10	0.7	0.7	15.1	10.7	10.6	0.4	2.2	2.1	1.9	14.3	**23.3**	17.8
Rank 11	0	0	19	13.9	12.6	0.1	1.7	2.8	0.6	10.1	18.2	**20.7**
Rank 12	0.1	0.1	**31.1**	11.7	11.2	23.1	1.1	1.8	0.8	4.7	10.7	26.7

Table 5: To find out the importance of different strategies in purchase of cosmeceutical products.

Influencer	Cosmeceutical Product Type (In Percentage)		
	Anti-Aging and Anti-Wrinkle Products	Acne Products	Sunscreen and Fairness Cream Products
My Self (Choice)	7.2	1.1	**21.7**
Male Friend/ Husband	1.1	0	10.8
Wife/Girl Friend	2.2	0.3	7.5
Parents/Relatives	5.3	1.7	**23.6**
Doctor	**14.4**	**24.4**	3.9
Parlours/Saloons	3.9	1.9	7.2
Advertisements	10.8	4.4	10.8
Any Other	55	6.1	14.4

Table 6: To determine the influential factor for each cosmeceutical product type.

Occupation	Cosmeceutical Product Type Consumption					
	Anti-Aging and Anti-Wrinkle Products		Acne Products		Sunscreen and Fairness Cream Products	
	Some Times	Daily	Some Times	Daily	Some Times	Daily
Student	0	0	34	23	25	17
Private Job	41	16	26	12	69	51
Government Job	17	3	6	1	21	10
Own Business	34	24	8	5	35	35
Housewife	25	2	5	0	32	13

Table 7: Occupation with consumption of cosmeceutical products.

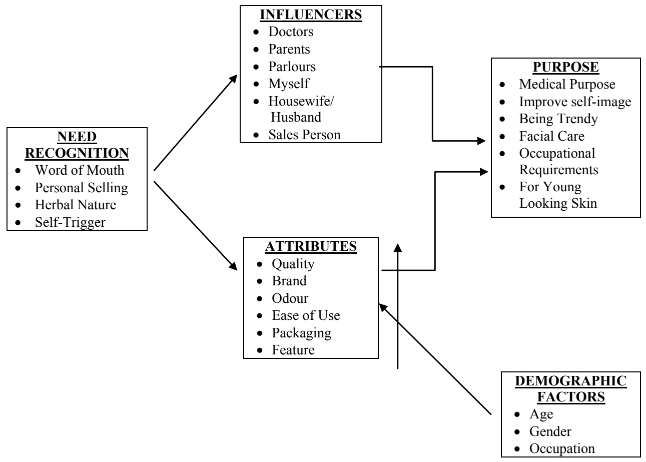

Figure 3: A Conceptual Model developed showing different factors influencing the male consumption behaviour (give the correlation values and customise it for the males).

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