

A Conceptual Development of Consumer behavior towards Herbal skincare products-A Review of Literature

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Abstract

Indian cosmetic industry could be defined as industry with hair care, skin care, beauty products etc. women do and die for the cosmetic products that could define their personality and their age couldn't be revealed. The intention of the paper is develop a conceptual model which will be empirically proved with the help of the data collected. In order to arrive to the conceptual model many different buying model were studied then it was decided that for marketer the main important criteria is repurchase so the variable associated purchase intention was then hypothesised with repeated purchase. This is primarily based on the literature review on consumer behaviour and purchase intention towards the product.

Keywords: Purchase intention, Repurchase, Herbal cosmetics

Introduction

Global cosmetics market is expected to garner \$429.8 billion by 2022, registering a CAGR of 4.3% during the forecast period 2016-2022. Cosmetics Market (makeup or beauty products) are mixture of chemical generally used to enhance the appearance or odor of the human body. Cosmetics Sun care, skin care, hair care, deodorants, makeup and color cosmetics, and fragrances are some of the cosmetics products that are predominantly available and used by individuals. Retail stores including supermarkets, exclusive brand outlets, and specialty stores amongst others are the major distribution channels, with online channels gaining popularity among consumers.

There is a considerable rise in disposable incomes over the past decade. The growth in global economies, changing lifestyles, rising demands of skin and sun care products due to varying climatic conditions encourages the growth of the market for cosmetics. A shift of preference towards natural and organic beauty products, particularly in U.S. and European countries, fosters the growth of the cosmetics market. Rising demand for natural, herbal and organic beauty products creates potential

opportunities for manufacturers to innovate and develop new products in accordance to consumer preferences.

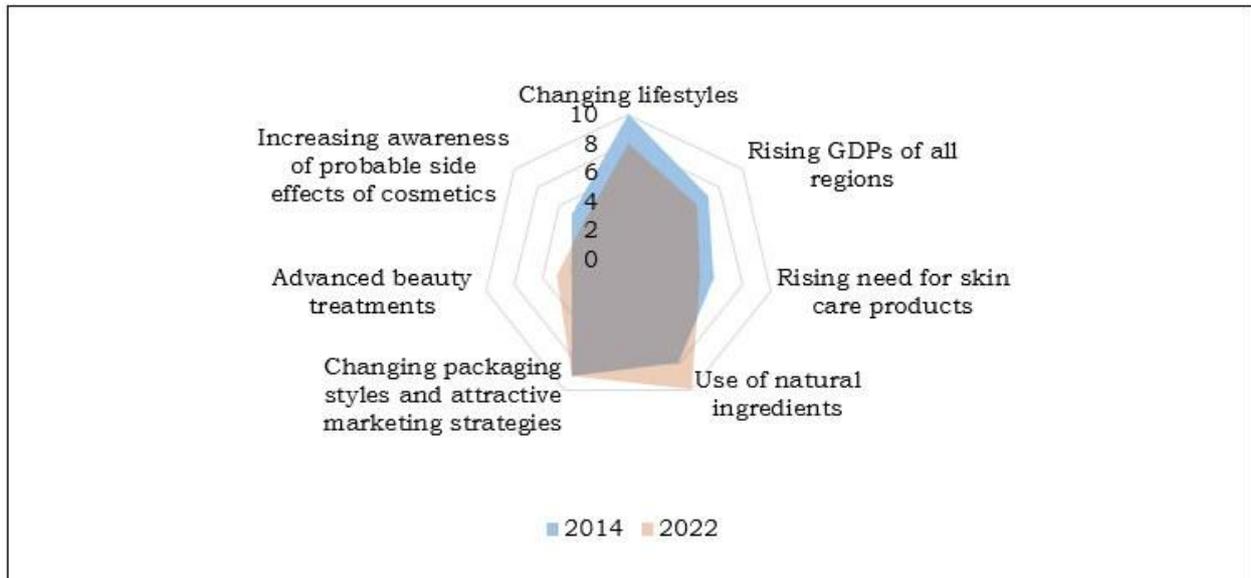


Fig top factor impacting global cosmetic market –allied market research

Changing lifestyle

Improvement in the current lifestyles of the individuals is majorly affecting the cosmetics market. Consumers have now become more conscious regarding the usage of cosmetics in their daily life in an effort to step up their style quotient and overall personality. Cosmetics play an important role in enhancing one’s inherent beauty and physical features. Men are also increasingly using cosmetics in their daily routine including various types of fragrances and deodorants. This growing demand of cosmetic products has in turn led to the growth of cosmetics market across the world.

Rising GDPs of all the regions

During recession 2007-2009, there was an overall global rise in GDP and economies across various regions. Presently, increasing GDPs of various countries is positively affecting the global cosmetics market. Continuous rise in GDP has improved the economies of various

countries and has raised the spending capabilities of individuals. Rising disposable income levels of the individuals across various regions is driving them to buy personal luxury goods, which, in turn, is positively influencing the global market growth.

Use of natural ingredients

Rising trend of the use of natural ingredients in cosmetic products is observed among various manufacturers. This trend caters to the ever increasing demand for natural or organic cosmetic products among customers. Use of herbal cosmetic products minimizes the chances of any possible side effects of the product. This ultimately increases the usage of cosmetics among individuals.

Top winning strategies

Presently, manufacturers are focusing on developing new products and innovating on the use of different ingredients in cosmetic products. In order to sustain and maintain their market position, manufacturers are adopting various strategies. Different strategies adopted by leading companies operating in the cosmetics industry are tracked from recent developments of the past two-three years. Product launch, acquisition, expansion and agreement are the prominent strategies adopted by the market players.

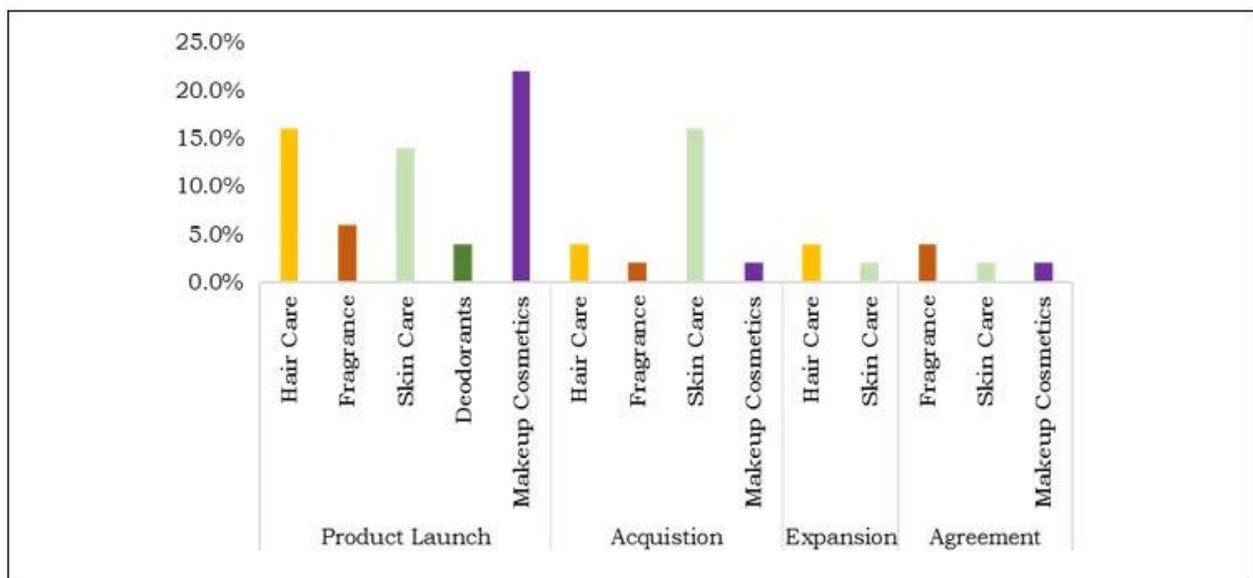


Fig – top winning strategies in world cosmetic market (Source: allied market research and AMR analysis)

Segment overview

The global cosmetics market is segmented based on category of cosmetics, mode of sale, gender and geography. The category segment includes skin & sun care products, hair care products, deodorants, makeup & color cosmetics and fragrances. Among these products, skin & sun care, and hair care products are majorly used by individuals and hold considerable amount of percentage share in global cosmetic products category market. The mode of sale comprises retail and online sale, where retail mode of sale is further classified into general departmental store, supermarkets, drug stores and brand outlets. Customers for buying cosmetic products majorly prefer the retail mode of sale. However, online medium for the purchase of cosmetic product is observed as a rising trend among customers. Geographically, the global cosmetics market is bifurcated into North America, Europe, Asia-Pacific and LAMEA.

Global Cosmetics Market by Category

Various categories of cosmetics and their current market trends are elaborated in this section. Categories of cosmetics discussed in this report include skin and sun care products, hair care products, deodorants, makeup and color cosmetics and fragrances.

Skin care category is one of the most technically advanced, complex and diverse categories of cosmetics. Products manufactured by the companies have to undergo many dermatological tests before they are introduced for final use in the market. Presently, product manufacturers are using new technologies such as nanogold and nanosome technology or nano particles for manufacturing skin care products.

Indian cosmetic scenario

A glimpse of light is thrown about cosmetic market leaders in India. The cosmetics and toiletries market in India is well developed and dominated by multinational companies and a few large Indian companies. A few major players, high entry barriers, fairly high rate of new

product launches and high advertisement spending characterize this segment. Major players in this market are HUL, Procter & Gamble (P&G), Colgate Palmolive (CP), Reckitt Benckiser, Godrej Consumer Products, Nirma and Himalaya ayurvedic concepts. HUL is the market leader in majority of the toiletries and personal care segment such as soaps/personal wash, oral care, fabric wash and talcum powder.

The personal care market in India was estimated to be about Rs. 141 billion in 2006-07 (Rs 128 billion in 2005-06) recording a value growth of about 10%. This includes two important daily hygiene product categories - personal wash (soap) and dental care (toothpaste and powders), which cannot really be classified as cosmetic products. Excluding these products, the size of the Indian cosmetics market is Rs. 64 billion (Rs. 57.5 billion in 2005). The major segments, by volume, are skin care and shampoos, followed by men's grooming products (which includes also shaving accessories).

Major Segments in Personal Care Market	% volume share
Shampoos	11.7%
Skin Care	14.9%
Hair Dyes & Colours	05.0%
Colour Cosmetics	02.5%
Oral Care	15.9%
Men's Grooming	09.0%
Personal Wash	38.9%
Deodorants & Perfumes	02.2%

A WHO (World Health Organization) study estimates that about 80 percent of world population depends on natural products for their health care instead of modern medicines primarily because of side effects and high cost of modern medicine (Sharma, Shanker, Tyagi,

Singh, & Rao, 2008). The worldwide herbal market products are around \$6.2 billion and estimated to reach \$5 trillion by the year 2050 (WHO & Kumar & Janagam, 2011).

There are more than 7800 herbal manufacturers and processors in India (T.P., Hisham, M, Madhu, & V., 2009).The increasing volume and spread of marketing and advertising is creating a challenge for the companies to either create awareness about the new products or to retain the consumer's interest in their products. It has become very difficult to grow, excel and stabilize in business performance.

Indian herbal exports valued at about INR (Indian National Rupee) 874 crores (1crore=10 million) in 2001-02 constitute about 73 percent in the form of crude drugs and extracts and 27 percent as finished products (Government of India Planning Commission, 2006). The Indian herbal market is registering a tremendous growth and is likely to reach INR 14,500 crore by 2012 and exports to INR 9,000 crore with a CAGR of 20 and 25 percent respectively, according to Associated Chambers of Commerce and Industry of India (Assocham) (Sharma A. B., 2008). Government of India established AYUSH re-naming ISM&H (Department of Indian System of Medicine and Homeopathy) in November 2003 to popularised herbal cure. The Department has elevated to a self-regulating Ministry w.e.f. 09th November, 2014 observing people curiosity.

Presently the demand for traditional Indian herbal products has increased tremendously in India and abroad (Government of India Planning Commission, 2011). Fast Moving Healthcare Goods (FMHG) in India worldwide known as Nutraceutical, defined as, ingredients with human health benefits beyond basic nutrition) industry is expected to grow by 20 percent to USD 6.1 billion by 2019-2020 due to rising awareness about health and fitness and changing lifestyle. However, dietary supplements, herbal and nutritional supplements will form the greatest opportunity areas for Nutraceutical processing, motivated by growing demand from an evolving consumer base (Corporate Catalyst (India)Pvt Ltd, 2015)

Indian herbal market trend as mentioned in brief report on Nutraceutical product in India (Sharma, Shanker, Tyagi, Singh, & Rao, 2008)

Year	US \$ in billion
1996	1

2010	2
2012	3
2015	5
2019	6.1 projected

The purchasing power and disposable incomes of the Indian consumer have considerably increased and it has created a niche for leading organizations in this segment in the last decade, resulting in phenomenal growth in this sector.

Consumer buying behavior is the sum total of a consumer's attitudes, preferences, intentions, and decisions regarding the consumer's behavior in the marketplace when purchasing a product or service. The study of consumer behavior draws upon social science disciplines of anthropology, psychology, sociology, and economics.

The consumer market consists of all the individuals and households who buy or acquire goods and service for personal consumption. The simplest model of consumer buyer behaviour is the stimulus- response model. According to this model, marketing stimuli (the 4 Ps) and other major forces (economic, technological, political, and cultural) enter the consumers "black box" and produce certain responses.

The dynamics of consumer behaviour and the consumer market, consumer buying behaviour refers to the buying behaviour of final consumer individuals and households who buy goods and services for personal consumption. All these are found in the consumer market.

LITERATURE REVIEW

BRAND IDENTITY

Women usually stick to one product for years and doesn't take risks with the cosmetic products as the products has direct contact with their skin for which women are highly concerned about. So for women, brand identity is like the product they like they never leaves it (Nam, Ekinici, & Whyatt, 2011).

Brand identity could be defined as the logo, mark, symbol of the product that remains in the minds of the customers for a longer period of time and differentiates it from the other products (He, Li, & Harris, 2012).

Like in case of beauty/ cosmetic products Maybelline, Lakme, Mac and Biotique there is particular identity mark like Biotiques' products always have green cap that shows that they are herbal range similarly Lakme's products have a logo with only 'L' in between etc. (Stokburger-Sauer, Ratneshwar, & Sen, 2012).

Anything in a product that sets in the minds of the users is said to be the brand identity. Women while purchasing products will see the colour, logo, design, mark on their favourite product and then purchase it and that's the main brand identity for a company (Albert & Merunka, 2013) .

BRAND SATISFACTION

Brand satisfaction could be defined as the satisfaction derived from the purchase of the product that the customer is either willing to use or used earlier and satisfied the needs of the customer. Every consumer purchases a product when they drive the level of satisfaction from each product and fulfils the wants of the customer (Torres & Tribó, 2011).

Women while purchasing the cosmetic products use the sample or shorter packaging of the product so that they could replace their existing product if the recent product could fulfil their demands (Selnes, 1993). It is quite difficult for a producer to fulfil the needs and demands of each and every customer but when it comes to women cosmetics there is such a huge industry that their loyal customers would shift from them to their competitors (Bloemer & Kasper, 1995).

For a company dealing with cosmetic products it is very important for the producer to attract the women customers regularly because women are their target customers so there is the need of brand identity of every company in the minds of the customers (Johnson, 2015).

BRAND COMMITMENT

Brand commitment is the comprehensive tool that suggests the interest of the customer towards the product. It measures the negative as well as the positive impact of the product on the consumers (Tuškej, Golob, & Podnar, 2013). Here, customers/ consumers are the women

using cosmetic products so there is a lying threat on each producer to continuously fulfil the needs of the target audience of different types of women (Albert & Merunka, 2013).

Women using the cosmetic products and getting satisfied with it will remain using the product until and unless their interest is taken away by other competitive product (Burmam & Zeplin, 2007).

This model of brand commitment prevents the women from leaving the brand by fulfilling their wants, maximizing their potential, optimizes the market costs and does SWOT analysis of the brand perception in comparison with the other one (Albert, Merunka, & Valette-Florence, 2013).

Purchase Intention

Many studies have been conducted to prove the influence of brand loyalty on purchase intention (Janzaee & Rouhani, 2013; Mourad & Valette-Florence, 2017; Pandey & Srivastava, 2016; Salehzadeh & Pool, 2017). (Ehsan Malik et al., 2013) proved in their research that Brand Awareness and brand loyalty are the strong predictors of purchase intention. A study conducted in Pakistan clearly indicated that awareness strongly influence the purchase intention (Majid, Sabir, & Ashraf, 2015).

Consumer behavior towards Herbal skincare products

Rekha and Gokila, (2015) found that consumers are well aware with various herbal cosmetics and now no longer considered as luxury items. The perception of side effect and the chemical is the reason to switch over to herbal based cosmetics among all age group, gender and educational qualification (Rekha and Gokila, 2015). The research conducted by Sawant, (2013) mentioned that consumers of the rural area preferred ayurvedic products. They relate it to native treatment and both male and female have similar consumer perception of ayurvedic products. The absence of side effect is the most important factor that influence women in the purchase of skin care products (Khan & Khan, 2013). As per Arya et.al, (2012) consumer shows a positive attitude towards ayurvedic drugs and products and use without doctor's prescription. People treat Ayurveda not as a treatment but as a lifestyle (Arya, Kumar, & Kumar, 2012). Joshi (2008) observed that the perception of people in traditional medicine is optimistic and emphasised the need to revive the system along the line of prevalent traditions and promote the usage of herbal medicines (Joshi K., 2008).

According to Huda and Sultan, (2013) physical procurement of herbal products by younger generation (17-23 years of age) are influenced and impacted by marketing mix elements (Accessibility, Availability, Awareness, and Affordability) and quality of the products. Khan and Khan, (2013) found that the company is having high selling activity also rated well in the overall marketing mix. This proves that marketing has an influence on the sale of herbal products. The quality of the product and promotional strategies plays significant role in the sale of the herbal drugs. This study also reported that awareness level among the Women Skincare Consumers is contributed by education, exposure to media and advertisements displaying the use of unique ingredients used in their products to create a unique selling point (Khan & Khan, 2013). Thaisorn et.al, (2012) in their study explained that marketing mix (4Ps: product, price, place and promotion) and inflation were factors discovered using in-depth interview and content analysis that impelled Thai consumers' perception about facial herbal cosmetic products. The study of Kewlani and Singh, (2012) found the brand, advertisement, awareness; small size package and availability were important factors in changing people perception towards ayurvedic products and therapy.

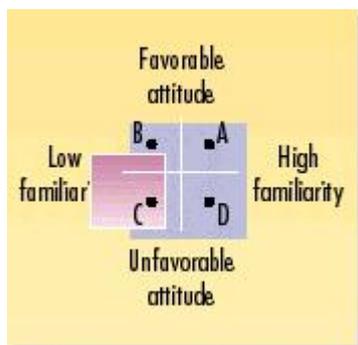
Sinha and Singh reported (2015) cut-throat competition in the cosmetic market in India between nation land international brand, and between herbal and chemical product. The increase tendency and attraction of younger generation especially female are towards the natural product. It is forcing established cosmetic companies to follow and adjust accordingly. According to Kotler and Armstrong (2009) at the evaluation stage, the consumer ranks brands and forms purchase intentions. Two factors can influence purchase intention and decision, the consumer attitude and the consumer's expected income, price and expected products benefits. According to Uncles et.al (2003), consumer loyalty is the repeat of a product, for those consumers must find a level of satisfaction to purchase the products in future. According to Philip Kotler, (2004) current brand image of the company and its products is done by familiarity and favourability study. The familiarity is to measure the target audience's knowledge about the brand and its products. The favourability checks the feeling towards the brand and its products of the familiar respondents. This defines brand and its products from the view point of the customers (Figure 5 present Familiarity-Favourability grid). The four cases and the respective view of the expert are as following (Kotler P. , 2004)

A-Most positive image: Must work at maintaining its good reputation and high awareness.

B-Less familiar to most people, but those who know it like it: Must gain the attention of more people. More investment is required in awareness building.

C-Viewed negatively by those who knew it: Must find way out why people dislike it and must take steps to improve its quality while keeping low profile.

D-It is seen to be a poor company or brand, and everyone knows it: Should lower its profile, improve its quality and then seek public attention.



Ruchi and Chaubey (2010) state that the mature expansion of satellite television and consciousness of the western beauty and fashion world, communications and promotions resulted a growing number of women in the work force, in particular, to become more conscious about their skin and beauty care products.

Malhotra (2003) states several reasons for a growth in skin care industry in the context of a small area in India, Chandigarh. This study finds that increased health and fitness, and fashion and beauty consciousness tied with increasing income, scientific developments, products and media hype contributed the fashion industry in making outstanding earnings. This has, in turn, added to the growth of beauty and skin care industry in Chandigarh, India. Thus, the 'life style marketing' has come out as one of the important strategies both for domestic and international marketers to induce consumers to accept their offers.

In their study on women's buying behaviour of personal care products, Sundari and Sakthivel (2011) revealed that the factors influencing purchase decision of personal care products are "primary benefit" and "secondary benefit". The primary benefit includes price, quality, and quantity. However, the "secondary benefit" includes ingredients of the product, the purpose

of the product, innovative features, manufacturer's reputation, and certification of the product.

Beauty and skin care products are no longer only for the women nowadays; men also are increasingly using the skin care products. Traditionally women use cosmetics for health care, but recent studies show that men are also using cosmetics at an increasing rate, which is increasing the future of cosmetic industries (Hall, Gough & Seymour-Smith 2013; Huda, Taufique & Sultan 2011). With rising demand from men and women, the market is getting more expanded and numerous competitors are emerging in this industry, and herbal care products are one of such players in this industry.

Sayma et al.'s (2008) study find that a number of plants are used to develop a herbal skin care product, and they may range from hard items such as seeds, fruits, barks, conch shell, woods, leafs, roots, flowers, rhizome, pollen to soft items such as coconut oil, milk, honey, salt, and water. The significance of herbal ingredients as healing agents and their role in beauty care is now widely recognized, and as a result, interests in the exploitation of medicinal and aromatic plants as pharmaceuticals, herbal remedies, flavorings, perfumes, cosmetics and other natural products has been increasing for the last few years (Rao & Arora 2004).

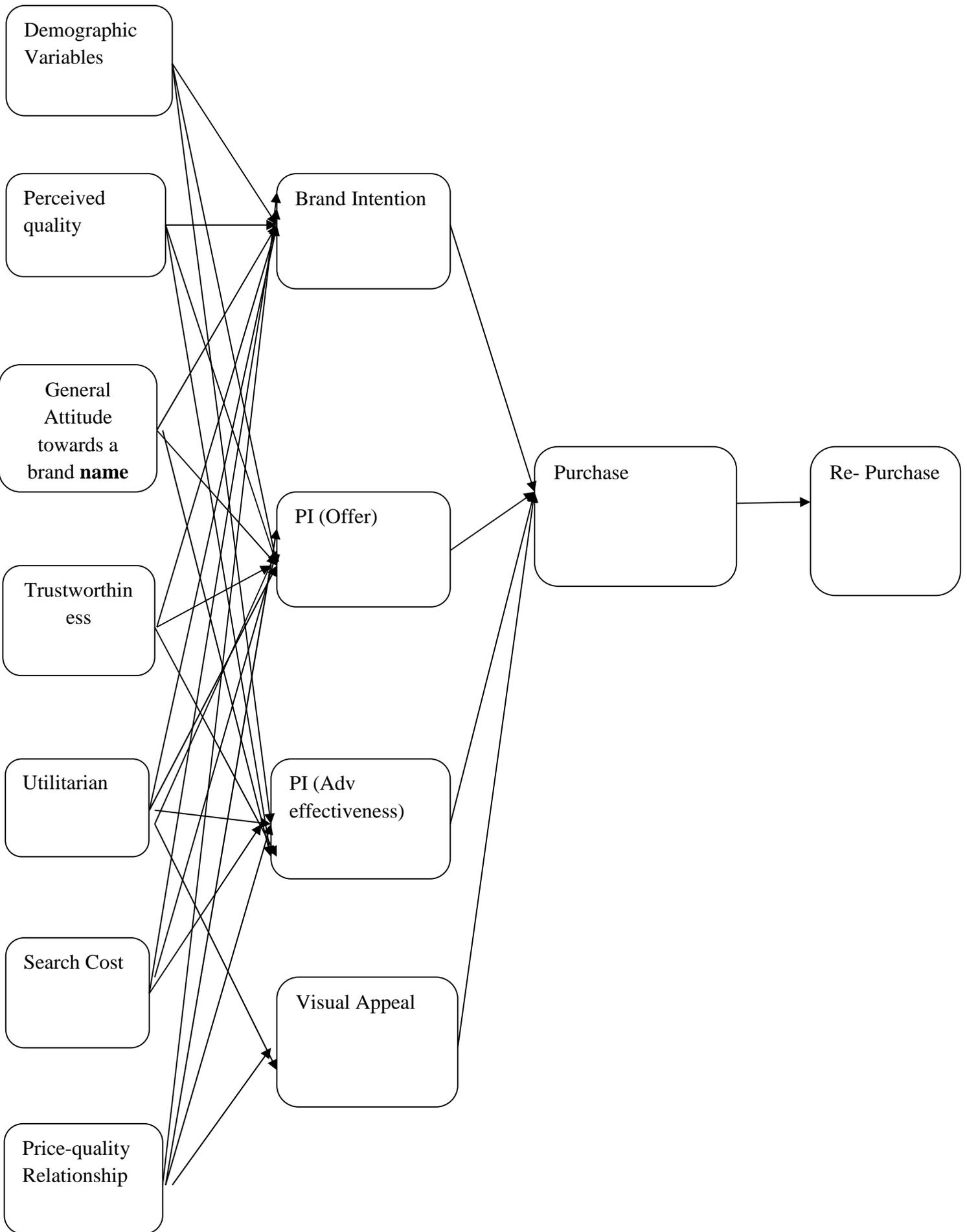
In a study of consumer adoption of herbal therapies, Ritho, Klepser and Doucette (2002) specified four types of influences that affect consumers' adoption of herbal therapies and these are: consumer characteristics, social systems, communication channels, and characteristics of herbals. The influence consumer characteristics on consumer adoption of herbal therapies include demographic attributes.

One of the study conducted on Attitudes and Perceptions of the Emirates Women Towards Facial Skin Care Products and Herbal Cosmetics in Heyam Ali¹, Rasha Saad², Ahmed Ahmed³, Babiker El-Haj⁴ *Department of Pharmaceutics and Pharmacy Practice, Dubai Pharmacy college Dubai, United Arab Emirates(2015)* indicates This study aimed to explore the factors that contribute to form women attitudes & motives towards cosmetics, and to determine the relationships among demographic attributes, age, gender, level of education, marital status and using motives in beauty & skin care products in UAE. Although this study has several contributions , this study has several limitations as well. First the study used a small sample mostly students of different universities located in Fujairah & Dubai, UAE, and confined the scope to limited districts in UAE . Therefore, future study can also need to investigate the differences in findings especially in age groups, generations, sex, urban-rural

and educated and semi/uneducated cosmetics & skin care users, to provide important insights, in this context.

Conceptual Model Developed

On the basis of the review of literature following conceptual model was developed which is as follows. The conceptual model will be empirically tested with the help of the data collected from the respondents. The intention of the paper is develop a conceptual model which will be empirically proved with the help of the data collected. In order to arrive to the conceptual model many different buying model were studied then it was decided that for marketer the main important criteria is repurchase so the variable associated purchase intention was then hypothesised with repeated purchase.



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