International Journal of Humanities and Social Science Invention
ISSN (Online): 2319 – 7722, ISSN (Print): 2319 – 7714
www.ijhssi.org ||Volume 5 Issue 11||November. 2016 || PP.43-50

Personal Care Products: Brand Consciousness

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ABSTRACT: *This paper presents an understanding of Personal Care Industry in India. The formal definition of personal care products is presented along with the categorization of personal care products. The paper highlights the consumer's brand preferences of the Five Personal Care Products (shaving creams, shaving blades, face cream, hair dye and deodorants). The present study is a sample study based on empirical data. The study is carried out by applying a focus group and survey method. Data for the study was collected from male visitors of different super markets, malls and specialty stores from twin cities of Hyderabad & Secunderabad. The primary data was collected from 1062 male respondents: Out of these 1062 responses, only 916 were considered for the purpose of analysis as these were complete and usable in all respects. An Empirical Study of Brand Consciousness prevalent among males is presented in this paper. Males who are generally considered as not being very particular about the brand they use in case of personal care products have proved to be otherwise.*

Keywords: *Brand Consciousness, categorization of personal care products, personal care products, male brand preferences*

I. Introduction

There is a rising aspiration among Indian men to look better groomed, which has led to the Indian men's grooming market's rapid growth of more than 42 percent in the last 5 years. An Assocham study showed that this growth is faster than the growth rate of the total personal care and beauty industry in India. Additionally, as more Indian men are looking to remain competitive in the workforce, they are seeking products to help them maintain a youthful look.

Personal Care products help people to look and feel good. Personal care products fall within the broad category of Fast Moving Consumer Goods and products that fall within the category of FMGCs are individually of small value, but together, they form a significant portion of the consumers' expenditure. Hence marketers are always interested to know how their brand is performing and how many people are actually aware of the existence of their brand or range of brands in the product category. Brand recall also plays a significant role in improving the sales of the company. It also important to find out what is the purchase motive behind the purchases. If the customers are unwilling to bear the risk of trying a brand since they are not aware of it, that translates into a huge loss for the company, therefore brand consciousness is all the more important in a products effective market life. "Interestingly, men who fall in the age group of 18 to 25, spend more money on grooming and personal care products than women in India. The aspirations and requirements of today's young Indian men are rapidly evolving. With a surge in disposable income, men are becoming more discerning and indulgent. In an evolving trend in India, men are beginning to look at innovative grooming and personal care products created specifically for them," highlighted the Assocham study.

India remains one of the fastest growing beauty markets globally, despite market slowdown growing at 13 percent per annum and valued at $6.3 billion. As the middle-class consumer base and its disposable income grows, the market is moving nearly four times faster than the $52 billion value of mature beauty markets and twice as fast as the $270 billion global market, according to a recent report by market research firm (Kline & Co.2009). With its high growth rate, the market offers extensive opportunities to domestic and international players. The color cosmetics market currently accounts for $60 million of the total market, while skin care accounts for approximately $180 million. The hair care market is pegged at $200 million, and the herbal cosmetics segment dwarfs the others at a value of $630 million. The global personal care industry is at $470 billion, with India accounting for $10 billion in sales.

The global personal care ingredient market is worth $23 billion, with India accounting for $520 million in sales. India accounts for 17% of the global population. Men have been increasingly involved in shopping activities while maintaining their masculine identity (Loo-Lee, Ibrahim, & Chong, 2005).

Even with double-digit growth rates, the market penetration of cosmetics and toiletries products in India is very low. Current per capita expenditure on cosmetics is about $1, compared to $36.65 in other Asian countries. This low market penetration for cosmetics and personal care products in India offers an opportunity for more significant growth down the road in this country of over 1.2 billion people.

The market size of India's beauty, cosmetic and grooming market will reach $ 20 billion by 2025 from the current $ 6.5 billion on the back of rise in disposable income of middle class and growing aspirations of people to live good life and look good, according to Assocham.

The emergence of aesthetically cognizant men is a societal change that is prevalent in major urban areas and increasingly proliferating to suburban and rural areas as well. Not surprisingly then, concepts such as “feminization of masculinity” (Iida, 2004) and “metrosexual” generation (Clarkson, 2005) have been discussed and have invited the attention of researchers.

II. PERSONAL CARE PRODUCT: DEFINITION

Food, Drug, and Cosmetic Act defines cosmetics by their intended use, as ‘articles intended to be rubbed, poured, sprinkled, or sprayed on, introduced into, or otherwise applied to the human body for cleansing, beautifying, promoting attractiveness, or altering the appearance.’ Among the products included in this definition are skin moisturizers, perfumes, lipsticks, fingernail polishes, eye, and facial makeup preparations, shampoos, permanent waves, hair colors, toothpastes, and deodorants, as well as any material intended for use as a component of a cosmetic product. It is well established that consumers use products and brands to activate different aspects of the self. Men may, for example, apply hair gels to keep their hair crisp in order to appear experienced and conservative at work but wear hair color by night in order to signal youth, energy and fun. Research suggests that such variations in appearance are effective in influencing perceptions, most notably perceived physical attractiveness and inferred personality characteristics.

III. PERSONAL CARE PRODUCT: CLASSIFICATION

The growth in personal care products had been encouraging over the years in developed countries. Table 1.1 furnishes details of 10 commonly used personal care products in developed countries. There are 28 Personal Care categories across 41 countries with 10 larger product areas. These Personal care categories are: The Baby Care, Body Moisturizing & Cleansing, Cosmetics & Fragrances, Dental Care, Face Cleansing & Moisturizing, Hair Care, Hair Removal, Health Care, Personal Paper, Sun Care (Source: 2015 ACNielsen a VNU business).

Table - 1.1 Growth in Personal Care Products in Developed Countries

Category of Personal Care Products	Growth (in Percentage)
Baby Care	0.7
Body Cleansing & Moisturizing	2.5
Cosmetics & Fragrances	1.2
Dental Care	2.6
Face Cleansing & Moisturizing	5.4
Hair Care	2.3
Hair Removal	2.4
Health Care	2.4
Personal Paper	-0.8
Sun Care	-0.4

Source: *2015 ACNielsen a VNU business*

From an analysis of the above table it is clear that the Face Cleansing and Moisturizing is at the 5.4 percent growth rate annually in the developed countries, while Dental Care is occupying the second position (2.6 percent) and the third position is occupied by Body Cleansing & Moisturizing (2.5 percent). Further, it may also be observed that there is negative growth in Personal care (-0.8 percent) and Sun Care with (-0.4 percent.) While Table 1.1 presented the details of growth in personal care products in developed countries, the analysis of table 1.2 reveals the growth in personal care products in developing countries. The table furnishes the growth details of 10 most commonly used personal care products in developing countries.

Table – 1.2 Growth Percent of Personal Care Products in Developing Countries

Category of Personal Care Products	Growth Percentage
Baby Care	12.9
Body Cleansing & Moisturising	6.7
Cosmetics & Fragrances	5.2
Dental Care	5.7
Face Cleansing & Moisturizing	3.4
Hair Care	6.6
Hair Removal	3.6
Health Care	13.5
Personal Paper	5.2
Sun Care	4.7

Source: *2015 ACNielsen Report*

From an analysis of the table 1.2 it is evident that the rate of growth in Health Care products is 13.5 percent annually in the developing countries, while Baby Care is second position (12.9 percent) and the third position is occupied by Body Cleansing & Moisturizing (6.7 percent.) The fourth position is occupied by Hair Care (6.6 percent).

IV. BRAND PREFERENCE OF SELECT PERSONAL CARE PRODUCTS.

The Personal Care Products selected in the study and the most preference brand among men with respect to Shaving Creams, Shaving Blades, Face creams, Hair Dye and Deodorants is presented in Tables 2.1 to 2.5

Shaving Cream: An attempt is made to know the different brands of shaving creams used by the respondents and the result is presented in Table 2.1

Table - 2.1 Shaving Cream- Brands Used

Brand	**Frequency**	**Percent**
Gillette Fusion	110	12.0
Nivea	9	1.0
Dettol	9	1.0
Palmolive	63	6.9
Old spice	27	2.9
Godrej	9	1.0
Gillette foam	183	20.0
Yardley	9	1.0
Denim	9	1.0
Olay men	9	1.0
Axe	18	2.0
Olympique	64	7.0
Edge	9	1.0
Park Avenue	45	4.9
Barber Choice	87	9.5
No Particular Brand	256	27.9
Total	916	100.0

Source: primary data

Shaving Creams are categorized on the following basis

Premium: Brands priced higher than 120% of the Category Average Price.

Popular: Brands priced higher than 80 % Category Average Price but less than 120 % of the Category Average Price.

Economy: Brands priced at less than 80 % of the category Average Price

There are three categories of Shaving Creams: Premium, Popular and Economy category. In the premium category are included Gillette Fussion, Gillette Foam, Yardley, Olay men, Axe and Park Avenue. In the popular category brands included are Nivea Men's Cream, Dettol shaving Cream, Palmolive Shaving Cream, Old Spice shaving cream and Denim Shaving Cream. Brands like Godrej Shaving Cream, Olympique and Edge are included in the Economy category.

An attempt is made to understand the Shaving Cream preference of respondents under the three categories of Shaving Creams. The results related to this aspect are presented in Table 2.1(a)

Table - 2.1(a) Category of Shaving Creams

Categories of Shaving Cream	Frequency	Percentage	Most preferred brand	Percentage
Premium Category	374	40.9	Gillette Foam	20.0
Popular Category	117	12.8	Palmolive	6.9
Economy Category	82	8.9	Olympique	7.0
Barber Choice	87	9.5	-	-
No Particular Brand	256	27.9		
Total	916	100.0	-	-

Source: primary data

An analysis of the table 2.1(a) shows that 40.9 per cent (374) of the respondents use the premium shaving cream category. It is found that 20.0 per cent of the respondents preferred Gillette Foam of shaving cream in the premium category. 12.8 per cent of the respondents use the popular shaving cream category and Palmolive (6.9 per cent) is the most preferred brand. 8.9 per cent of the respondents use economy category of shaving cream with Olympique shaving cream being preferred by 7 per cent of the respondents. Further it is also found that 27.9 per cent (256) of the respondents are not particular about the brand they use while 9.5 per cent (87) respondents rely on the barber to select the shaving cream which signifies that 9.5 per cent men go to the saloon for their shaving needs.

Shaving Blades: An attempt is made to know the different brands of shaving blades used by the respondents and the results are presented in Table 2.2

Table - 2.2 Shaving Blades- Brands Used

Brands	**Frequency**	**Percent**
Gillette Victor	138	15.1
Gillette Presto	192	21.0
Gillette Fussion	73	8.0
Gillette Mach Turbo 3	18	2.0
7oclock	72	7.9
Topaz	36	3.9
Laser	45	4.9
Barber Choice	86	9.4
No Particular Brand	256	27.9
Total	916	100.0

Source: primary data

Shaving Blades are categorized on the following basis
Premium: Brands priced higher than 120% of the Category Average Price.
Popular: Brands priced higher than 80 % Category Average Price but less than 120 % of the Category Average Price. Economy: Brands priced at less than 80 % of the category Average Price There are three categories of shaving blades: Premium, Popular and Economy category. Premium category includes Gillette Victor, Gillette Fussion and Gillette Mac Turbo while Gillette Presto and 7oclock shaving blades are in the popular category. In the economy category Topaz, Gallant and Laser are included.
An attempt is made to understand the Shaving Blades preference of respondents under the three categories of shaving blades. The results related to this aspect are presented in Table 2.2(b)

Table - 2.2(b) Category of Shaving Blades

Categories of Shaving Blades	Frequency	Percentage	Most preferred brand	Percentage
Premium Category	229	25.1	Gillette Victor	15.1
Popular Category	264	28.9	Gillette Presto	21.0
Economy Category	81	8.8	Laser	4.9
Barber Choice	86	9.4	-	-
No Particular Brand	256	27.9		
Total	916	100.0	-	-

Source: primary data

An analysis of the table 2.2(b) shows that 25.1 per cent (229) of the respondents use the premium shaving blades category. It is found that 15.1 per cent of the respondents preferred Gillette Victor among shaving blades in the premium category. 28.9 per cent of the respondents use the popular shaving blades category and Gillette Presto (21.0 per cent) is the most preferred brand. 8.8 per cent of the respondents use economy category of shaving blades with Laser blades being preferred by 4.9 per cent of the respondents. Further it is also found that 27.9 per cent (256) of the respondents are not particular about the brand they use while 9.4 per cent (86) respondents rely on the barber to select the shaving blade which signifies that 9.4 per cent men go to the saloon for their shaving needs.

Face Cream: An attempt is made to know the different brands of face creams used by the respondents and the result is presented in Table 2.3

Table - 2.3 Face Creams- Brands Used

Brand	**Frequency**	**Percent**
Fair Lovely	30	3.3
Boroline	50	5.5
Fair Lovely Men’s Active	73	8.0
Nivea sun	19	2.1
Fair Handsome	54	5.9
Vaseline men	113	12.3
Fair ever	9	1.0
Ponds	45	4.9
Garnier Light	74	8.1
Fem	1	.1
Himalaya	1	.1
Boroplus	102	11.1
Not using	198	21.6
No Particular Brand	147	16.0
Total	916	100.0

Source: primary data

Face creams are categorized on the following basis
Premium: Brands priced higher than 120% of the Category Average Price.
Popular: Brands priced higher than 80 % Category Average Price but less than 120 % of the Category Average Price.
Economy: Brands priced at less than 80 % of the category Average Price
There are three categories of face cream: the premium category includes Nivea Sun, Garnier light and Himalaya. Popular Category includes Fair and Lovely, Fair and Lovely Men's Active, Fair & Handsome, Ponds and Fem. In the economy category Boroline, Vaseline men, Fairever and Boroplus are included.
An attempt is made to understand the face creams preference of respondents under the three categories of face creams. The results related to this aspect are presented in Table 2.3(a)

Table – 2.3(a) Category of Face Cream

	Frequency	Percentage	Most preferred brand	Percentage
Premium category	97	10.3	Garnier Light	8.1
Popular category	203	22.2	Fair & Lovely Mens Active	8.0
Economy category	274	29.9	Vaseline Men	12.3
Not Using	198	21.6		
No Particular Brand	147	16.0		
Total	914	100		

Source: *Primary Data*

An analysis of the table 2.3(a) indicates that 22.2 per cent (203) of the respondents use Popular Category brands of face creams; Fair & Lovely Men's Active (8per cent) is found to be the most preferred brand. 10.3 per cent (97) of the respondents use Premium category face creams like Garnier light, Nivea Sun and Himalaya face creams, out of which Garnier Light is preferred by 8.1 per cent. 12.3 per cent of the respondents prefer to use lower end category of fairness creams with Vaseline Men (12.8 per cent) being the most preferred brand. Further, it is found that 21.6 per cent of the respondents don't use fairness cream at all while, 16 per cent (147) respondents are not particular about their choice of face cream. They do not insist on any one particular brand and are not brand conscious.
Hair Dye: An attempt is made to know the different brands of hair dye used by the respondents and the analysis of the results are presented in Table 2.4

Table - 2.4 Hair Dye- Brands Used

Brands	**Frequency**	**Percent**
Garnier	150	16.4
Vasmol	56	6.1
Indica	82	9.0
Godrej Expert	83	9.1
Loreal	36	3.9
Home made concoction (henna)	46	5.0
Barber choice	145	15.8
Not using	218	23.8
No particular brand	100	10.9
Total	916	100.0

Hair dyes are categorized on the following basis
Premium: Brands priced higher than 120% of the Category Average Price.
Popular: Brands priced higher than 80 % Category Average Price but less than 120 % of the Category Average Price.
Economy: Brands priced at less than 80 % of the category Average Price
There are three categories of hair dyes: premium, popular and economy category. Under the premium hair dye the brands included are: Garnier and Loreal and popular brands included Indica and Godrej Expert while in the economy brand Vasmol was included also under the economy hair dye category were found to be Local/Homemade concoction. The data pertaining to hair dye categories are presented in Table 2.4(a)
Hair Dye: An attempt is made to know the different categories of Hair Dye used by the respondents and the analysis of the results are presented in Table 2.4(a)

Table - 2.4(a): Categories of Hair dye

Categories of Hair Dye	Frequency	Percentage	Most preferred brand	Percentage
Premium Hair Dye Category	186	20.3	Garnier	16.4
Popular Hair Dye Category	165	18.1	Godrej Expert	9.1
Economy Hair Dye Category	102	11.1	Vasmol	6.1
Barber choice	145	15.8		
Not using	218	23.8		
No Particular Brand	100	10.9	-	-
Total	916	100	-	--

Source: *Primary Data*

An analysis of the table 2.4(a) indicates that 20.3 per cent (186) of the respondents use the premium brands of hair dye, with Garnier (16.5 per cent) being most commonly used brand. Among the popular hair dye brands 18.1 per cent (165) respondents Godrej Expert dye (9.1 per cent) is found to be the most preferred. Among the economy brands (11.1 per cent) 102 respondents it is found that Vasmol hair dye with (6.1per cent) is preferred.

Perfumes/Deodorants: An attempt is made to know the different categories of Perfumes and Deodorants used by the respondents. The respondents did not make much of a distinction between a Perfume and Deodorant in that they used these interchangeably. An analysis of the results obtained with regard to the usage of these are presented in Table 2.5

Table - 2.5 Pefrumes/Deodorants- Brand Used

Brands	**Frequency**	**Percent**
Axe	117	12.8
Nivea	27	2.9
Wild stone	119	13.0
Park avenue	148	16.2
Cinthol	74	8.1
Rexona	9	1.0
Zatak	18	2.0
Brute	85	9.3
Poission	9	1.0
Spykar	9	1.0
Adidas	9	1.0
Santoor	54	5.9
Blue Lady	55	6.0
Not Using	82	9.0
No Particular Brand	101	11.0
Total	916	100.0

Source: primary data

Perfumes and Deodorants are categorized on the following basis
Premium: Brands priced higher than 120% of the Category Average Price.
Popular: Brands priced higher than 80 % Category Average Price but less than 120 % of the Category Average Price.
There are three categories of perfumes/deodorants: premium, popular and Economy category. Under the premium category are included WildStone, Brute, Poission, Spykar, Addidas and Blue Lady. Under the popular category Axe, Nivea, Park Avenue, Cinthol and Zatak are included. Rexona and Santoor are included under Economy Category. The data pertaining to these is categories presented in Table 2.5(a)

Table - 2.5(a) Categories of Perfumes/ Deodorants

Categories of Perfumes/ Deodorants	Frequency	Percentage	Most preferred brand	Percentage
Premium Category	286	31.3	Wildstone	13
Popular Category	384	42.0	Park Avenue	16.2
Economy Category	63	6.9	Santoor	5.9
Not using	82	9.0		
No Particular Brand	101	11.0	-	-
Total	916	100	-	--

Source: *Primary Data*

An analysis of the table 2.5(a) indicates that 31.3 per cent (286) of the respondents use the premium brands of deodorants, with Wildstone (13 per cent) being most commonly used brand. Popular brands are being used by 42.0 per cent (384) respondents with Park Avenue being preferred by (16.2 per cent). Among the economy brands being used by (6.9 per cent) 63 respondents Santoor with (5.9per cent) is preferred with 54 respondents preferring it.

Summary of Analysis of Data Pertaining to Brands Preferred.

40.9 per cent (374) of the respondents use the premium shaving cream category. It is found that 20.0 per cent of the respondents preferred Gillette Foam in the premium category. 12.8 per cent of the respondents use the popular shaving cream category and Palmolive (6.9 per cent) is the most preferred brand. 8.9 per cent of the respondents use economy category of shaving cream with Olympique shaving cream being preferred by 7 per cent of the respondents. Further it is also found that 27.9 per cent (256) of the respondents are not particular about the brand they use while 9.5 per cent (87) respondents rely on the barber to select the shaving cream which signifies that 9.5 per cent men go to the saloon for their shaving needs.

25.1 per cent (229) of the respondents use the premium shaving blades category. It is found that 15.1 per cent of the respondents preferred Gillette Victor among shaving blades in the premium category. 28.9 per cent of the respondents use the popular shaving blades category and Gillette Presto (21.0 per cent) is the most preferred brand. 8.8 per cent of the respondents use economy category of shaving blades with Laser blades being preferred by 4.9 per cent of the respondents. 27.9 per cent (256) of the respondents are not particular about the brand they use while 9.4 per cent (86) respondents sail with their barber in for shaving blade use.

22.2 per cent (203) of the respondents use Popular Category brands of face creams; Fair & Lovely Men's Active (8per cent) is found to be the most preferred brand. 10.3 per cent (97) of the respondents use Premium category face creams like Garnier light, Nivea Sun and Himalaya face creams, out of which Garnier Light is preferred by 8.1 per cent. 12.3 per cent of the respondents prefer to use lower end category of fairness creams with Vaseline Men (12.8 per cent) being the most preferred brand. 21.6 per cent of the respondents don't use fairness cream at all while, 16 per cent (147) respondents do not insist on any one particular brand and are not brand conscious.

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V. CONCLUSION

With recession and slowdown, India did not have much setback in growth and so are the different industry, showing positive growth. One such industry that is found growing is personal care products or cosmetics. This opened up gates for better and premium products and services in beauty markets to be offered to the customers. It is found that in India the penetration level of personal care products is very low and this is giving more opportunity for growth. With the disposable income of middle income group increasing constantly this industry is witnessing good growth.

The personal care products may be categorized under the consumer products instead of industrial products. Further, it is found that with less number of good local brands offering personal care products international brands are giving premium but quality products. From the source Consumer Outlook, 2009, KSA Technopak It is found that the Upper and Middle income group of consumers spend on Personal Care which is second next to home appliances among the 14 category list of products. So, it is clear that Personal Care products' have good market among this income group of consumers.

When the top five money-spending priorities of Sec A and Sec B spends in different regions, It is found that the spending on personal care products was among the first four in the West, North and East zones. From 2015 the '*Urban Seekers Group'* has been spending on "choice-driven" categories (alcohol, apparel, *personal products* & services, household products, automobilies, motor bikes and scooters, communication and recreational goods & services) were large enough in absolute terms 42,500 Indian Rupees ($930) per average urban seeker household.

It is observed that as Indian's are price conscious the marketing of personal care products is difficult. The personal care products industry is in nascent stage but has all the potential for growth with double digits and at a faster mode. Hence, the present study is an attempt to analyze the consumer behavior towards the personal care products.

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