# UNDERSTANDING THE INDIAN CONSUMER'S ATTITUDES WITH RESPECT TO CLEAN BEAUTY

by

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## Dedication

My thesis is dedicated to God and my grandparents whose blessings from the heaven above has been my strength and source of inspiration throughout this program.

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Firstly, I am grateful to God for blessing me throughout with all the complications I experienced and helped me to finish my degree.

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It is with a feeling of immense accomplishment that I dedicate this thesis to my father and to my husband – both of whom have an ultimate dream to see me complete a doctorate degree.

ABSTRACT

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“Clean beauty” – a fairly new word which encompasses a range of safe, natural and trustworthy ingredients and products. However, in India, the lack of a specific definition by regulatory organizations, allows consumers to create a definition of their own, and this is something brands as well do. The consumers of India continue to steer towards the natural and herbal narrative and hence clean beauty is considered synonymous to “organic”, “sustainable” or “healthy”. Many past literatures and studies on this topic have showed an absence of knowledge of the terms associated with clean beauty and therefore revealed the lack of cognizance of it. With the rising desire for transparency, consumers look for authentic information from sources they can trust. With the rising levels of e-commerce through the online channels of beauty and personal care products, it gives consumers a wider platform to research information and a wider reach to sources to know about the constituent ingredients. Generally, a known perception, which is also quoted in the paper, is that these green goods attract a greater purchase rate, acting as a deterrent to adopting clean beauty products.

The aim of the research is to apprehend the Indian consumer’s awareness levels of clean beauty products, purchasing behavior of consumers vis-à-vis clean beauty products, the sensitivity of pricing strategies of green products, channels of information for clean beauty products and the consumers’ psychographic clusters and their purchasing behavior. The analyzed data has been received from Mintel Ltd, and further interpretations have been made. The data was collected using a structured questionnaire across India on a sample of 3000 participants. Result of analysis shows awareness levels are low, safety is a priority and the consumer are price sensitive as well. But consumers are highly influenced by word of mouth and trusted sources of information.

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CHAPTER I:

INTRODUCTION

## 1.1 Introduction

India is categorized as fourth internationally for yielding the maximum revenue in 2021, from the category of beauty and personal care products (Statista, 2021). "Clean" brands in India form approximately 5-10 percent of the entire skincare and beauty business category (Sahrash and Rao, 2022). The new word - 'clean' products has gained prominence. As quoted by Olioso (2019) - "Clean is a beautiful, powerful and popular word". It indicates the factors of trust and safety, both of which the consumers and the industry is aspiring for today. The clean beauty movement has spread widely, not restricted to only beauty and personal care and the industry has grown additionally due to the mounting demand for reliable clean natural products. This is fueled by the rise of indie / homegrown beauty brands that base their identity and brand story on the concept of clean beauty.

However, on the flip-side, there is no regulated definition of the term. And hence, there are varied interpretations of the clean beauty concept, each different by consumers, brands and retailers. While the exact specifics may be different, most consumers and even brands seem to concur that the key aspects of clean beauty include: ethics, transparency, sustainability and safety (Gleason-Allured and Grabenhofer, 2019).

The primary motive of clean beauty brands is to postulate to consumers who are willing to move away from toxic chemicals, an alternative and sustainable product. By performing this, the clean beauty program has remained fruitful in stimulating the customary ways of use and bring about new standard. In India, levels of awareness are surging and there is a growing need to procure eco-friendly products, which has headed to an intensification in the buyer's need plus has changed their outlook in an optimistic way towards brands working in an eco-friendly way.

Due to the rising requirements from consumers for authentic information sources they are looking at brands to be transparent with their information. Consumers are researching information about scientific formulations, percentage concentration of ingredients and claims made on product packaging. Another important issue is the magnitude to which buyers will be willing to shell out money for clean beauty products. Although, the number of published papers and literatures linked to the understanding of natural and clean beauty has boosted, there is still further scope and need for more research about particular consumer behavior and attitudes regarding purchase of natural and green cosmetics.

Clean beauty is a powerful word which encompasses a plethora of safe, natural and trust invoking ingredients and products. This is something the consumers of today's day and age aspire to have in their products and also look for when purchasing any product – specifically food or beauty products. However, the lack of a specific definition by regulatory organizations, especially in a country like India, allow consumers and in turn brands to create a definition of their own. Typically, and more logically, a green or clean beauty product would mean a product that contains ingredients which are safe and nearest to nature – thus they are not synthetic, which means they are in their least processed state and definitely not harmful.

Consumers today are becoming more aware of their environment and understand how their buying decision vis-à-vis eco-friendly products controls their environment. Clean beauty product brands have a responsibility to provide consumers with sustainable and alternative options. By doing all of this, beauty brands have been challenging the way synthetic cosmetics are being consumed traditionally.

Consumers today do not have a clear understanding of what “clean beauty” movement stands for, in spite of the raging talk and noise about it worldwide. Something interesting is that Indian consumers veer towards clean beauty products considering them synonymous to “organic”, “healthy” and “sustainable”. Many past studies on this topic have revealed that there is a shortage of understanding of clean beauty and the descriptions and technical terms associated with it.

Brands which are looking at avenues to launch their clean beauty products will not only need to build awareness at the consumer’s level, but will also need to answer a common question - which is the degree to which clean beauty shoppers will pay a premium for such products. Generally, the perception is, eco-friendly products attract a higher price, acting as a deterrent to adopting clean beauty products. Published literatures show a mixed response to relation between price and purchase behavior with respect to green beauty brands.

This thesis has a goal to understand the Indian population’s awareness of their environment and how their actions and purchase behavior is impacted by their awareness levels, extent to which consumers will pay a premium for green products, sources of information and how consumers’ demographic and psychographic qualities will affect the purchasing behavior of clean beauty products.

### 1.2 Research Problem

Researchers have concluded that clean beauty products are on the rise globally, however, understanding of differentiating factors when compared to non-clean beauty products is yet to be established. It is essential therefore to identify the clusters of consumers who could be potential target audience based on their attitudes towards clean beauty products and the different qualities for which consumers would be agreeable to pay additional for when purchasing a clean beauty product.

### 1.3 Purpose of Research

The awareness level for consumers is still nascent, partially due to lack of regulations governing these products and moreover varied sources of information that consumers are exposed to. With increased online purchases of cosmetic products, it gives consumers a wider platform to research information to know about the constituent ingredients. It also allows beauty influencers to create their own definitions of clean and natural beauty.

In order to assess if companies must continue to focus on clean beauty products and invest their time and money into marketing these product SKUs, it is vital to study the awareness levels and consumer purchase attitudes for these products. Moreover, conclusions from this study is a starting point for brands to create their appropriate marketing mix for various demographics and consumer clusters based on their awareness and purchasing patterns.

### 1.4 Significance of the Study

In continuation to the above discussion, my work aims to help and contribute to the industry by helping brands to more accurately understand how to market clean beauty products to consumers in India.

### 1.5 Research Purpose and Questions

Summing up the above research objectives, the following research questions are being addressed:

1. How aware are consumers about clean beauty?
2. What factors are consumers considering when purchasing a clean beauty product?
3. Can clean beauty products demand a premium from consumers?
4. What are the sources that consumers are getting their information from?

The eventual use of this research paper is targeted to help brands develop a validated marketing plan for clean beauty products. The goal of the study is to deliver a comprehensive evaluation of industry practices and published literatures in relation to clean beauty products, study the consumer data received and thereby formulate a marketing strategy.

More specifically, the sub-objectives of the study are enumerated as:

1. Developing a better know-how on what consumers currently know about clean beauty practices in India
2. Understanding what factors consumers consider when purchasing clean beauty products
3. Reviewing what sources of information consumers use to understand more about the beauty product space.
4. Providing recommendations and advice to brands and marketeers who active in the beauty sector.

The outcome of this report will be treasured to the industry practitioners as well as associated supply chain companies in developing improved policies for formulating and marketing clean beauty products.

New players and potential investors in the industry can benefit from the findings and implications of this research. If the industry as a whole can come together to make regulatory practices and definitions easier for consumers to understand, it would help create a more formalized category to operate. Thus, the outcome of the research might help the industry as a whole as well.

# CHAPTER II:

# REVIEW OF LITERATURE

## 2.1 Introduction

Within the FMCG sector, the consumption of clean beauty products is on the rise, due to affluent consumers seeking out beauty items which have ingredients that are cleaner or purer than others. India ranks fourth in 2021 in terms of beauty and personal care revenue across the world (Statista, 2021). NielsenIQ (2021) defines a truly clean beauty product as “one that is free from all the following: parabens, sulfates, phthalates, artificial colors and fragrances, plus 600 other ingredients.” These so called truly clean products have a reported market size of over $400 million in sales numbers and have shown an even higher growth percentage (+8.1%) than the entire category (+2.0%).

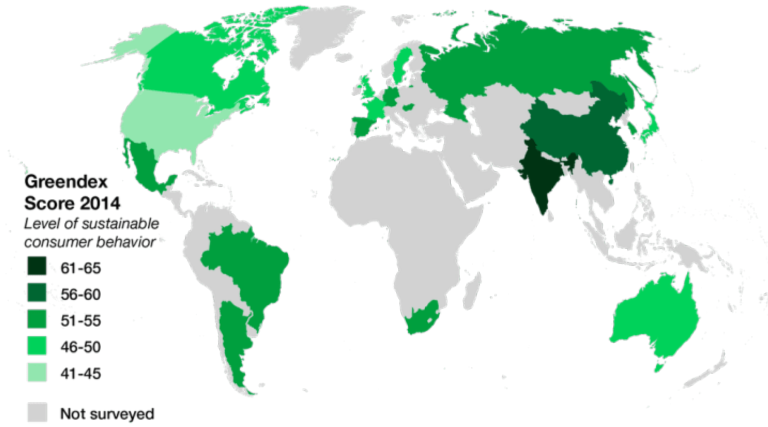
Consumers started considering cosmetic products which are harmless for their hair and skin owing to Covid-19 bringing health and safety of oneself to the foreground. The realization crept in where consumers started to consciously look for products which are sustainably sourced, ethically packaged and environmentally safe. This shift in consumer mindset actually ignited the clean beauty movement in India. But the stipulation is that these products have had to prove themselves to be safer than synthetic beauty products.

In the past it has been mentioned time and again that environmental consciousness, health concerns and focus on appearance has led to consumers leaning towards clean beauty products (Newsom et al., 2005). But it does not stop there. As pointed out by various authors in their studies, (Kangun et al., 1991; Martin and Simintiras, 1995) developed countries have seen a rise in consumption of clean beauty products (Todd, 2004). Green and clean beauty product consumers are growing in developing countries as well (Martin and Simintiras, 1995; Schlegelmilch et al., 1996; Nimse et al., 2007).

Buyer preferences in durable goods, non-durable goods and services industries are transforming into green products from grey products. Consumers are making informed decisions to choose companies which have a green image. Saxena and Khandelwal (2012) piloted a report in order to try and cognize the behavior of these three types of industries and their inclinations towards green attitude. The discoveries from his report revealed that businesses in India are leaning towards green practices and understand that changing to green methods which aid them in attaining a competitive benefit to achieve sustainable growth.

The National Geographic Society along with Globescan (2010) conducted a survey to publish the "Consumer Greendex." India, Brazil and China were at the top when it came to consumer's green attitudes while consumers from developed industrialized countries were ranking low. Consumers from India, Russia and United States showed the highest increment in environmentally sustainable behaviors (Howe et al., 2010). Almost 15 years later, in 2024, proudly, the results of Greendex score revealed that Indians were ranking higher in environmental consciousness than China, Brazil, Russia, Germany, Canada, Australia and America (Greendex, 2024).

*Image 2.1: Greendex scores 2024*




Today's conscious consumer is looking for products that match their ideologies and values since they are becoming more environmentally conscious. The new world of so-called clean products has gained importance. Quoting Olioso (2019) – "Clean is a beautiful, powerful and popular word." It encompasses factors like safety and trust which are important to many consumers today and what the industry aspires to achieve.

The emergence for clean products was with incorporating simple "safer" ingredients. According to Olioso (2019) in his article, Ren skincare back at the beginning of 21st century established the clean beauty narrative with their clean skin care products. They designed it with minimalist approach on design. They published a list of ingredients to steer clear from like parabens, mineral oils and sulphates and carried this further into educating the consumer on different types of harsh chemicals and toxins.

Since then, the free-from list has grown to blanket other ingredients as well like silicones and phthalates, as the health and environmental concerns continue to rise. The overall aim for brands has always been to make it simpler for consumers to understand and encourage them to read the ingredient list by making it simpler to decode ingredients.

With the clean beauty movement growing and spreading its wings to every industry, India has seen a rise in niche homegrown indie brands as well who develop their offerings around the clean beauty narrative. However, due to the nonexistence of an official characterization of the term, brands, consumers and retailers are free to interpret it as per their understanding leading to a fairly unregulated market. As clean beauty gains popularity, despite its vagueness, something that universally can be concluded is that the strong pillars include: transparency, safety, sustainability and ethics (Gleason-Allured and Grabenhofer, 2019).

Since the bubble of clean products and safe products is developing worldwide, the demand is not restricted to only the food sector. It is expanding to other industries as well (Debora et al., 2022) encouraging people to reconsider their shopping habits. Today, being "green" and adapting the offerings to be eco-friendlier has grown from being a basic necessity to now becoming an opportunity for companies and consumers to grow (Vincent, 2012). This movement is gaining momentum due to the ongoing and ever-growing threat of climatic changes and global warming (Fonseca-Santos B, 2015).

According to Sahrash and Rao (2022), of the total skincare category in India, clean brands make up to about 5-10 percent of the sales. There is a term "skinimalism" (Sahrash and Rao, 2022) – which blurs the line between minimalistic beauty and skincare. It basically translates into being comfortable with one's skin and embracing it with all its weaknesses and flaws paving the way for a more holistic approach to beauty

According to Drake (2019), the fact that natural and clean beauty products may not really deliver what they promise in terms of efficacy is probably one of the biggest concerns for consumers. It is therefore a challenge for brands to match up with their conventional counterparts. With lack of regulations, the challenge is how can a consumer assess the product based on ingredients, manufacturing process or even the fact that it is truly "clean." The solution can be drawn from the food industry, where clean eating is actually a process where recipes choose healthy whole foods, since they are in their least processed form and are the closest to nature.

A few noticeable developments for the Indian cosmetic industry as forecasted by Sahrash and Rao (2022) are –

1. **Sustainability**: Keeping in mind the wellness of the mind and the body, consumers have shifted their attention and are focusing on holistic well-being leading to increased talk about sustainable products and services.
2. **Clean beauty**: The buck does not just stop at gathering information. Consumers are now endeavoring to feature moral codes in their shopping and purchase as well. Buyers are searching for products which are safe for skin and hair and also safe for the environment.

Long ago in 1970 was when the first ever article was published about shopper's performance towards being eco-friendly. Since then, the literatures, publications and overall wakefulness of the consumer’s attitudes towards many eco-friendly products has amplified. (Seyed Saleki and Maryam, 2012).

Looking at previous studies on clean beauty cosmetics, Park and Lee (2021) conducted a study on how the purchase intention of clean cosmetics is influenced for adult women. Products produced in an environmentally friendly way were referred to as clean cosmetics. They investigated and researched domestic and overseas clean beauty cosmetic trends to examine the consumer communication process with the identity of clean beauty cosmetic brands and digital media.

Having a sustainable lifestyle for the consumer entails incorporating products in their daily lives which are made in a viable way. Since beauty products play a huge part in the of consumers’ lives and routines, this is a big market. With growing consumer demand of safe and sustainably manufactured products, companies have no way out but to adjust to these new requirements.

The important point is that products do not need to be just safe but also effective and live up to their claims as well. The aim of sustainable beauty brands is to provide consumers with choices of ethical products since they are trying to move away from toxic products. This is enabling a change in the way traditional cosmetic products are being purchased and consumed.

According to Debora et al. (2022), the offering of sustainable practices contains:

1. Manufacturing products by using renewable sources,
2. Incorporating ingredients and raw materials using ethical sources only
3. Making sure the labor is working in ethical conditions,
4. Transparency about product information
5. Making sure business activities reduce the impact while giving back to the environment

Tran et al. (2022) aimed to understand awareness of possible harmful constituents in beauty products that claim to be clean. The research was conducted by looking up websites of Target and Walgreens and what consumers search for which were labelled "clean," "natural," "organic," or "hypoallergenic" from March to June 2020. Across both Walgreens and Target websites, 1470 exclusive results were found which were then analyzed. Of this total, surprisingly, 93.8% products had at least one likely allergen. This is a revelation that the clean beauty formulations are not based on science but more on the buyer view of boosted "safety and health".

Similarly, in India, Kumar and Ali (2011) conducted a study with an objective of analyzing the awareness levels of organic food and factors that induce purchase. The research was panned across 200 respondents in two major cities in India. Of the total 58.8% of total respondents claimed to be aware of organic food. The study concluded that for organic foods to grow, it is essential to build cognizance and understanding of people towards organic foods. Similarly, Essoussi and Zahaf (2008) believe that the customer's lack of knowledge and information pertaining to organic foods, will be a hindrance to their understanding of organic food and thus being able to differentiate between organic and natural products.

### 2.2 Theory of Planned Behavior

Past studies have one thing in common that a green consumer's buying behavior is influenced past beliefs and interactions, social norms, awareness about environment and pro-environmental beliefs and principles. Even now, many studies use particular attitude prototypes to justify how social and behavioral communications influence purchase of green products. One such well-known model is the Theory of Planned Behaviour (TPB) – (Kim and Chung, 2011) the oldest and most extensively used theory for exploring connections between societal norms, individual beliefs and its influence on green product business (Kalafatis et al., 1999; Ahn et al., 2012).

The personal evaluations and how favorable or unfavorable they are to be able to accomplish a certain conduct is what defines the attitude. According to Ajzen (1985), if a person has an optimistic outlook towards anything, then it is possible they show a certain behavior. The Theory of Reasoned Action (TRA) postulated by Fishbein and Ajzen (1975) which was published earliest proposes the theory that a person's behavior is determined by goals and also outlook and personal norms. Afterward, in 1980 (Ajzen and Fishbein, 1980) the Theory of Planned Behavior (TPB) was an extension to the TRA in 1975 to quantify social control as a degree of attitude and norms.

To be able to validate intentions and behavior and their correlations with purchase, in the field of green product purchase, several scholars (Zhao et al., 2014; Hsu et al., 2017) have used these models for their research validations, not just internationally but also in India (Yadav and Pathak, 2016; Prakash and Pathak, 2017).

On adapting the Fishbein and Ajzen's (1975) TRA, Hansen et. al (2012) concluded that it may be reasonable to display the intervening interface between values and the shopper's behavior to buy free-of products.

According to Kalafatis et al., (1999), to understand how societal and individual norms, opinions and apparent behavior impact intentions, one can apply the Theory of Planned Behavior (TPB). Another study used the TPB model to match consumers from America and China (Chan and Lau, 2002) and how they vary in their environmental consciousness. The findings suggest that group conformance, personal norm, and observed behavioural control is what influences ecologically sociable behavior of the Chinese. Whereas, principles like "saving resources" and "high prices" are what was important to American consumers.

Kim and Chung (2011) used the model of planned behavior to inspect how consumer's buying aim of organic personal care brands is affected by past experiences and the consumer values.

Ahn et al. (2012) applied the behavioral model to examine the pro-environmental behaviors of Korean consumers. Factors such as self-esteem, and apparent concern towards the environmental problems are essential in understanding pro-green behavior. Additionally, the effect of injunctive and expressive norms on personal environmental norms (Park and Sohn, 2012) is what decided pro-environmental behavior.

The purpose of this current paper is to ponder the affiliation between the consumers' individual values, their state of mind and their behavior related with purchasing free-of products.

There is inadequate exploration on what consumers buy, how aware are they, what is the price points they look for in India. Since India is an emerging economy, it is important to understand the things that encourage them to buy eco-friendly products. Subsequently, peer groups and networks who have purchased eco-friendly products further pushes consumers to buy more, since today's consumer believes in discussing their purchases with others.

Although the Indian market has shown rising sales of organic and natural care products, the major literature available is about how to market the product, instead of consumer behavior. It is difficult to be able to formulate a marketing strategy without any in- depth knowledge of shopper behavior for this market. This study relates how attitudes affects a consumer's behavior which in turn impacts their purchase intention for them.

**2.3 Awareness of Clean Beauty**

Clean beauty is one monumental development within the global wellness industry which has seen tremendous exponential growth in the last few years. According to a research performed in India, close to 9 out of 10 consumers showed an affirmative attitude vis-à-vis the usage of energy saving products, and 8 out of 10 are concerned about green packaging (Jaiswal and Kant, 2018).

According to Singh (2013), India is budding with green eco-friendly products. The studies in Indian context, so far, have more literatures on green behavior in lodging category (Manaktola and Jauhari, 2007), or how consumers are purchasing green and organic food (Knight and Paradkar, 2008; Chakrabarti, 2010; Anand, 2011). Such studies have shown that Indian shoppers desire companies which manufacture environmentally friendly goods (Knight and Paradkar, 2008; Nath et al., 2012). Consumers are also becoming picky in what they buy by choosing products which are not only sustainable and eco-friendly, but are also competitively priced (Manaktola and Jauhari, 2007; Singh et al., 2012). So much talk and past literature points toward an increase in the eco-friendly cognizance of Indians (Singh, 2009; Singh et al., 2012). At the same time, it is important as a business decision maker to know the factors which influence their decision-making process. So, through this study the author is trying to explore the magnitude of cognizance in the Indian context, and to gauge their association with eco-product buying.

Companies adopt eco-friendly manufacturing practices and processes to design green products and thereby comply with regulations to meet the consumer's growing demands (Papadopoulos et al., 2010). In doing all of this, an ideal green product must be designed in way that it is environmentally friendly, using less or no harmful ingredients, complying with all safety norms, but also not compromising on its overall efficacy and performance.

Today, "Green" marketing is no longer a trend; it is in fact a basic way to do business (Maheshwari, 2014) and businesses that are in this market should realize the value of going down the green road and concurrently incorporating their go-green message into their marketing plan to communicate their eco-friendly endeavors to their consumers. The study conducted by Maheshwari (2014) revealed that consumer awareness of environmentally friendly products is low. 6 out of 10 consumers found it difficult to identify eco-friendly products when shopping and therefore brand recall was low – they were unable to name a specific brand of eco-friendly products. In order to differentiate from the clutter, brands are practicing green initiatives (Saxena and Khandelwal, 2012).

There are limited studies in the Indian context, which have tested the production initiatives and green marketing plans of brand manufacturers (Nair and Menon, 2008;

Shrikanth and Raju, 2012). The consumer's awareness of green products recontinues to remain low, although there is a constant effort from governmental agencies to protect the environment. Even though studies have shown rise in consumer awareness, what remains questionable is the conversion of awareness to actual product purchase. Ishaswini and Datta (2011) opinion that in order to predict the intent of eco-friendly purchase of the consumer, it is important to judge their awareness and concern for the ecosystem.

Things that negatively influence buying behavior is unavailability of information, performance statistics and data, formulation details and efficacy studies. In order to understand buying behavior, Thakur and Gupta (2012) identified two sets of factors - internal and external which impact green purchase. For example – internal factors were motives, income, concern for environment, whereas external factors would be promotional incentives and composition. A deal-breaker which creates a behavior – attitude gap is the absence of data about green products thus hindering the buying decision and affecting sales (Ohtomo and Hirose 2007).

Before deliberating further into behaviors of Indian consumers vis-à-vis green purchase, it is important to examine how the typical Indian buys general products. There are studies (Mathur et al., 2008; Johnson and Tellis, 2008) that deliberate that culture, ethnicity and lifestyle are influencers for buying behavior (Durvasula and Lysonski, 2008; Khare, 2011; Gupta, 2013). Eckhardt and Mahi (2004) hypothesize the history of India has showed us that there is overlaps with British ideologies in terms of the traditions, values, cultures and more so the community and constitutional system.

On the other hand, Johnson and Tellis (2008) suggest that local cultural values are in fact more important to Indian consumers. In India, the social values need to match up to the consumer's buying decisions (Khare, 2011). It is not one party's responsibility to ensure growth of green products and ultimately, it is the collaborative works of the companies, buyers, and regulatory bodies (Rawat and Pande, 2024). For these stakeholders to achieve a successful green marketing strategy, the following guidelines will need to be followed:

1. Ascertain a clear objective and correspond it within the organizational vision. Start inside out by making sure all employees are aligned with the concept before implementing it for the market.
2. Use all the 4Ps and make sure they all align with the establishment's idea to achieve conservational responsibility.
3. Accentuate honesty as a basic element in making and retaining customer loyalty.

Clean eco-friendly products create a word map that include terms such as natural, safe, ethical and transparent. Debora et al., (2022) suggested due to the lack of a recognized description of what clean beauty actually is, it is upon the brands and consumers to really interpret what it stands for and what the products should be like. Typically, clean products must satisfy the following conditions:

1. Must have an ingredient list which contains safe ingredients and must not contain any hypothetically harmful ingredients

2. Labeling must be transparent such that the consumers can easily read and check the product information.

An interesting finding by Drake (2019) was that a clean and green ingredient can in instances be completely opposite, even though they may denote being natural. A green ingredient is defined by how much information regarding manufacturing, sourcing and disposal is shared by the manufacturer – even if a chemically inclined step is used. A clean ingredient is a step ahead and consists of materials used in their least processed state or those that are closest to nature and follow the prescribed green manufacturing principles. So, this would mean that a “synthetic” substance can also be green if the green manufacturing principles are followed. But it would not necessarily be clean.

As explained by Mora and Ross (2021), clean beauty products are made keeping the consumer’s health in mind and the surroundings. Such products would ideally contain ingredients which are ethically sourced. Thus, a clean beauty product manufacturing is multi-fold – body, mental wellbeing, health and environment.

Clean beauty has 4 pillars as defined by Chiralertpong (2021):

1. Removal of unnecessary ingredients
2. Focus on safety of the user and the environment
3. Keep ethics and sustainability of source in mind when designing the product.
4. Keep labels transparent

Many studies (Chryssohoidis and Krystallis, 2005; D’Souza et al., 2006) highlight one point which is that the biggest driver to adopt green beauty products in the consumer’s knowledge of green certification (Leire and Thidell, 2005; Chen et al., 2006).

There is an immediate need to setup some standards and guidelines for the industry to follow and help companies/brands to retain consumers through education and making them understand more about clean beauty. Hence there is scope for clean beauty brands to focus on free-from claims and showcase the authencity of ingredients by being transparent with their claims to grow the clean-beauty segment. But the vagueness of the term and lack of definitions is a key issue for clean beauty movement. The Indian consumer’s preference of products being natural is leading them to define clean beauty as being “organic”, “sustainable” or “healthy”.

Khan and Khan (2013) found in his study, conducted in a state Madhya Pradesh in India, that factors which induce purchase are: environmental knowledge, health and hygiene concern, product awareness and demographics like age, gender, income, occupation and ethnicity. To add to this is another factor- product availability (Kaufmann, 2012).

A 200 - participant study by Debora et al. (2022) in Italy revealed that most participants were not able to understand the ingredient list of cosmetics. But, this is not surprising considering that cosmetics contain synthetic chemicals and therefore their names are confusing for the reader. This is where brands being transparent and handholding the consumer comes into being as this will help consumers to make safer product adoptions.

Cervillon and Carey (2011) in their research highlighted that consumers do not have an in-depth understanding of green cosmetics.  The basic awareness is that so-called green cosmetics happen to use more plant and natural oils as ingredients and reduce the chemicals. The general perception is that “natural” products use ingredients which are sourced from nature, and on the other hand “clean” products may not necessarily be natural but typically are free of harmful ingredients. Similarly, green products avoid being animal tested and also are vegetarian – which means no use of animal extracts.

Clean beauty products overlap with organic and clean eating in terms of containing natural raw materials and not containing any toxic substances. When a user is purchasing any food item generally, they do try to read the label, understand the source of the raw materials, the impact on farmers and environment, since they believe a wrong ingredient could harm them as they are ingestible. Similarly, beauty companies can draw a parallel from the food industry and educate consumers about the ingredients and its impact on the environment. This will help products to differentiate and be easily recognizable as eco-friendlier when compared to the competition. According to Laroche et al. (2001) an ideal green consumer is likely to boycott companies which do not follow environmental rules and eventually refuse to purchase products made by them.

An eco-friendly cognizant consumer (Debora et al., 2022) tries to protect the environment by making informed choices. A cognizant consumer evaluates at every stage what the impact of his/her actions and purchases will have on the environment by thoroughly studying about products. Thus, they choose cosmetic products which least pollute the environment and also are safe for their health. This behavior by environmentally conscious consumers is considered responsible socially and environmentally. Debora et al. (2022) furthered classified such consumers into four groups:

1. **"Behavioral greens"**- consumers who are in all forms "green" and even purchase products which are environmentally safe even if they are priced at a premium.
2. **"Think greens" -** consumers who have ideas and understanding of clean behavior however, their actions do not necessarily translate into being environmentally friendly.
3. **"Potential greens" -** consumers who care a little less about the environmental issues and their behaviors and purchase patterns are not constant.
4. **"True browns" -** consumers who pay no heed to environmental concerns and in some cases even have negative reactions to all the noise made around this issue.

The conversion of intention into willingness to purchase is how one can judge the intent of purchase for a green product (Joshi and Rahman, 2015). Consumers vary in their understanding of clean beauty products, and their knowledge can vary based on demographic factors as well (D'Souza et al., 2007). Published literatures show that females exhibit pro-environmental behavior slightly additional than males as they are slightly more concerned about environmental concerns (Tikka et al., 2000; Zelezny et al., 2000).

Kumar and Ghodeswar (2014) conducted a survey on 403 working Indians from Mumbai. The study revealed that there is a willingness to support ecological causes, because of there being an understanding of environmental responsibilities, and keenness towards looking up for information related to green products. It is clear that Indians are environmentally conscious, but their purchase behavior is still not clearly understood yet.

There is an increase in consumer's pro-environmental behavior as there is a parallel surge in the awareness of eco-friendly products and services. Consumers who are knowledgeable about the ecosystem's issues and are concerned about them, purchase only eco-friendly products (Laroche et al, 2001). This awareness also brings along with it a surge in the number of buyers who are willing to pay a premium for eco-friendly products. This means the market for eco-friendly products is ever strengthening (Laroche et al., 2001). Therefore, it is safe to propose that pro-green consumers are the ones who are aware of the environment, products, concerns and how their behavior can impact the environment (Ishaswini and Datta, 2011). Their concern about the environment tends to be a stimulus to their green buying behavior thereby inducing purchase of eco-friendly products.

Although, the number of publications related to natural and organic cosmetics is amplified, (Johri and Sahasakmontri, 1998), there is still scope for more research especially about consumers' purchase decisions and the decision-making process, triggers and attitudes towards green products. The growing interest in natural, organic and safe products raises important opportunities for marketers, vendors and investors.

Some factors which act as drivers to purchase (Joshi and Rahman, 2015) are product attributes, environmental knowledge whereas premium pricing and reduced accessibility are major reasons why consumers shy away from purchasing green products.

Traditionally, cosmetics were made using chemicals and even microplastics – which is now banned – and these tended to be harmful for the environment and the user (Andrady, 2011, Seinfeld & Pandis, 2016). However, today's consumer is more conscious of what they are choosing, how their choices impact their behavior and the environment. Accordingly, they are becoming more vigilant and choosier in their consumption pattern and purchase behavior.

The consumer's acceptance of eco-friendly products is evolving as the lifestyles are different across consumers (Jungermann & Jungermann, 2010). The past studies have highlighted what influences buying behavior – primarily things like purchase intents, purchase judgements, willingness to pay and eventual purchase behavior. Though most of the studies and papers are based in Europe and American contexts, there is a growing need to expand these concepts for other countries as well - especially India. Although it is only fair to understand that in spite of the basic differences that may exist between cultures, more or less the factors and purchase drivers are similar between cultures.

To gain insight into consumer buying behavior, it is vital for brands and marketeers to comprehend why and how individuals purchase green cosmetics, their frequency of purchase and barriers to purchase. It's important to keep in mind that simple awareness of the environment is not enough to result in eventual purchase and there are a lot many other reasons why consumers buy what they buy.

Owing to the limited information available for eco-friendly buying behavior in India, a research gap was noticed. This current thesis is an effort to fill this by understanding the Indian consumer's product knowledge, definitions, concerns, attitudes and any other factors that may influence buying behavior.

Therefore, the present thesis is trying to assess consumer behavior and attitudes to regular products and green products with special focus on their awareness and purchase intentions.

**2.4 Factors considered when purchasing a clean beauty product**

People are concerned about what they apply on their skin (Aqueveque, 2006). According to Rubin and Brod (2019), many of the constituents that have been criticized seem to be picked up randomly as an attempt by companies to "greenwash" their products so that they are seemingly more attractive. Based on their personal perception of safety, consumers look for "clean" and "natural" beauty products. However, no customary, methodical basis, or regulatory supervision exists in how ingredients are used in "clean" products (Tran et al., 2022).

The past studies have discussed the idea of eco-friendly products (Strizhakova, and Coulter) gaining popularity and attentiveness (T. Ramayah, J. W. C. Lee, and O. Mohamad, 2010). Branding a product helps consumers to trace the product back to the manufacturers and also helps them to assess product quality (Koehn, 2001). Therefore, it is safe to say that concern for the environment and awareness of brand names are both equally important factors when deciding which product to purchase.

Traditionally, scholars have supposed Indians to be environmentally conscious (Jain and Kaur, 2004; Goswami, 2008). Yet, there are studies pending to assess the reason and motive behind the Indian consumer's behavior and the minuscule consumption rates of eco-friendly products, despite them being highly environmentally conscious (Sheth et al., 2011).

A person's behavior-attitude relation is defined by Ajzen (1991) as the "degree to which a person has a favorable or unfavorable estimation of the behavior in question." We have explored this in the theoretical framework section above. Also, the intention of a person to carry out a particular behavior, and if the behavior is good or bad, positive or negative, is what entails attitude (Leonard et al., 2004).

An individual's attitude is the key significant interpreter of behavior (Kotchen and Reiling, 2000). Across many countries, there has been a positive relation established between attitude and social intention vis-à-vis eco-friendly products (Mostafa, 2007).

Birgelen et al. (2008) witnessed in the beverages category consumers who have a positive outlook about the ecosystem and are concerned about the issues, are the ones who would willingly pick up eco-friendly packaged beverages. Attitude is basically psychological factor and is dependent on the consumer's judgements of the environment – a positive behavior and attitude can be more constructive (Chen and Tung, 2014).

However, Hines et al. (1987) theorized the relationship between attitude and behavior as moderate and individuals who were highly concerned about the environment, were more likely to carry out green activities like recycling and reusing.

Another significant theory about the extent of connection between Indian consumer's perceived attitudes and green product purchase is evident from this paper. This is because the individual's intention to purchase (Chen and Peng, 2012) is influenced by perceived behavioral control (Cheng et al., 2006; Baker et al., 2007; Chen and Tung, 2014).

Several studies have been undertaken globally to understand purchasing patterns of eco-friendly products. Pudaruth et al. (2015) for example used the factor analysis for his study sample in Mauritius and identified that there are eight factors and their combinations that influence buying behavior of eco-friendly beauty brands: "women lifestyles, self-image health and economic considerations", "ethical consumerism among females", "pharmacological essence of green cosmetics and beauty care products", "visual appeal and physical cues in cosmetic stores", "price-conscious decisions and effective promotion", "belief on ethical claims in green messages", "brand image and usage experience" and "sales representatives and social influences". Shrivastava et al. (2023) highlighted in his study conducted in Ajmer city, Rajasthan (India) that present-day consumers are growing more informed and are demonstrating improved attitudes particularly in their cosmetic buying choices, stressing the preference for natural and organic products. Health awareness and environmental concern significantly impact consumer enthusiasm towards green cosmetics, with the level of fulfillment being a following factor. Information certification and online availability contribute the least towards inducing purchase.

Khare (2015) suggested that things that positively affect green purchase behavior are self-principles about green purchase, motivation from networks, and past experience with a brand. Kim and Choi (2005) identified "collectivism, environmental apprehension and perceived consumer effectiveness (PCE)" as factors that affect purchase behavior. Biswas and Roy (2015) based on past studies determined there were five magnitudes consumer choice namely - functional, communal/social, environmental/ecological, conditional and knowledge. Likewise, many studies have particularly fixated on the relationship between environmental attitudes and their correlated behaviors and how they are directly proportional to each other.

Yadav and Pathak (2016) in his study recommended that attitude, societal pressure, perceived behavior, concern and knowledge about the environment are predictors for purchase intention especially for young consumers. Interestingly, of all the factors, consumer's decision to buy is most affected by the individual's concern for the environment. This goes to show that the youth of India are also concerned about environmental issues and consider them when making purchase decisions. Let us also understand that to make any purchase decisions, the consumer's basic emotional, physical and psychological needs have to be met. This holds true for when it comes to making purchase decisions for clean beauty products as well. So, marketing specialists can communicate how the purchase of a green cosmetic is actually helping them cater to the consumers' concern of environmental protection and their purchase action justifies their obligations toward the environment. With rising awareness, Indian consumers are making efforts to learn about green products.

Sangeeta et. al. (2024) intriguingly pointed out that purchase intentions and decisions were actually not influenced by environmental concerns and also there is no difference between gender demographics with respect to factors responsible for inducing purchase. But what is common across studies is that the intent to buy eco-friendly cosmetics actually influences purchase behaviour in a considerable way. This therefore closes the cavity between intention and behaviour.

Talking about demographic factors affecting purchase, Kumar (2021) examines consumers from Bangalore (city in India), how age, income, and education contour consumer attitudes towards clean beauty products. Similarly, Patnam and Azeem (2024) surveyed Bangalore and acknowledged that product safety and efficacy along with attributes of environmental sustainability are key factors influencing purchase.

Brand knowledge, reputation and recall and the efficiency of the product is most important to influence the purchasing behavior (Debora et. al, 2022). Khan and Khan's (2013) study conducted on 250 buyers from Madhya Pradesh (a state in India) highlighted that almost 7 out of 10 women agreed that the safety of the product when applied to the skin is the most important factor when purchasing skin care products

Considering demographic differences in purchasing behavior, a few studies have focused entirely their studies on the green behaviour of females only (Laroche et al., 2002). The link between values and behavior is usually the attitude (Homer and Kahle, 1988; Shim and Eastlick, 1998) which can also be a pyramid model comprising of value, attitude and behaviour at the vertices (Jayawardhena, 2004) and how they are inter-connected.

Gawas's (2022) study focused on how consumers distinguish the relationship between green buying behaviour of diverse Ayurvedic cosmetics and consider both quantitative and qualitative factors were considered when purchasing. Sharma et. al. (2024) found that 4 in 10 consumers from Sikkim (India) preferred herbal cosmetics, while 3 out of 10 voted for synthetic products and 2 in 10 had no preference. For synthetic product cheerleaders, the factors influencing them included effectiveness, availability, and affordability. Sharma et al. (2024) successfully highlighted that of the 4Ps, place played an important role. Hence limited choice and product availability is what prevents buyers from purchasing herbal products.

Drawing a parallel from the food category, Singh (2024) highlighted that the consumer's prime concerns with procuring organic items were restricted availability, astronomical prices, lack of faith in the integrity of certifications and advertising campaigns for organic food, even though they were interested in the health benefits of using such products.

Bhatia and Jain (2013) concluded that there was high level of awareness about green marketing initiatives based on a survey conducted on 106 respondents. These studies, papers and researches give wholesome ideas to marketers to design products, campaigns and pricing strategies to cater to the growing needs of consumers in India.

As suggested by Nav et al. (2024), for Indian companies, prioritizing well-being and functional benefits of clean products is the driving force behind consumer purchase intentions for this market. Safety is the most vital followed by quality when it comes to purchase deliberation for herbal products (Kalra et. al., 2024). Therefore, companies must focus these two aspects of herbal products. Filieri et al. (2018), revealed that the majority of participants held a favorable perspective towards green cosmetics and purchased them due to the perceived safety of these products and their ability to mitigate environmental harm.

One point of prominence is that, not much observed research has been conducted that links behavior, attitudes and motivation to purchase clean beauty products on the consumer base for the entire country of India.

The above literatures conclude that there is not a clear definition and perception about clean beauty and hence consumers vary in their choice of factors when choosing a clean beauty product.

### 2.5 Clean beauty and price

Consumers have understood the need to safeguard the environment (Kalafatis et al., 1999). The drive of going green has become important is all businesses globally (Brown, 1996). With the rising awareness and need to purchase sustainable products, there is an observed level of support that consumers have towards companies working in favor of the improvement of the ecosystem. The tremendous price sensitivity of consumers for green buying doesn't show considerable environmental accountability (Malhotra and Maheshwari, 2011). A common exploratory issue is the degree to which eco-friendly consumers will agree to a price premium for such products.

Price sensitivity was discovered to be negatively influencing the buying intent of eco-friendly products. Product's price is therefore a foremost reason why consumers shy away from purchasing eco-products (Grail research, 2010). Higher the price sensitivity, lower is the purchase intention. This indicates the significance of pricing policies in the organic cosmetics marketplace. Joshi and Rahman (2015) in their empirical exploration concluded that consumers may think about purchasing green products but it may not convert into actual purchases, reiterating the point of intent versus behavior.

Green price (Bhalerao and Deshmukh, 2015) has always been a point of competition for green product companies. Typically, it is defined as the selling price of eco-friendly products. Several factors like target segment, production costs and order quantity of items decides the final cost of the product. It is interesting to understand that recyclable and renewed ingredients go into the production of green products which, more often than not, leads to higher prices compared to their usual alternatives. If the gap in pricing between green and non-green products is higher, there is greater difficulty for consumers to accept green products.

According to Maheshwari and Malhotra (2011), "consumers are not committed to improve their environment on the cost of their pocket and lay the responsibility to the companies to produce eco-friendly products and on government as well. Consumers are puzzled about the real benefits of green products and thinking that the company might cheat them in the name of green products."

While most people recognize the benefits of green products and hence have a favorable attitude, there are some individuals who have a negative attitude towards them due to the fact that they can be more expensive. A study that was conducted by Rybowska (2014) found that consumers consider environmentally friendly cosmetics to be a luxury item due to the fact that they are difficult to obtain and pricey.

Quite a few reports have been published the pricing strategies which could work for green products (Chekima, et al., 2015). In the United States of America, consumers are discouraged from obtaining green products because they are alleged to be too pricey.

Published literatures show a mixed response to relation between price and purchase behavior with respect to green beauty brands. Gawas (2022) found that price and green buying are inversely proportional. The author is his study, conducted in Panjim City of Goa, India, identified the key influences on green buying behaviour of 231 Ayurvedic cosmetic product buyers. The findings revealed that consumers professed price and green buying to be negatively proportional. This insight is helpful to deliver an edge up to companies by creating their products at a lesser cost than their rivals. Many green products are also priced higher due to higher production costs and reduced economies of scale.

A typical challenge for brands marketing their green products in India is the price sensitivity of consumers. Many buyers think that premium pricing actually labels a product as luxury and hence are reluctant to pay higher (Manaktola & Jauhari, 2007).

Price sensitivity is higher regardless of what product consumers buy (Biswas and Roy, 2015). Social value is the main reason that impacts green buying behaviour. Consumption levels vary across consumers based on their preferences for green and non-green products. Boztepe (2012) noted that his study had results inverse of all past studies which is that people are now agreeable to pay additional for eco-friendly products. Additionally, Litvine and Wustenhagen (2011) cited that the new trend of thinking and buying green is motivating consumers to pay a higher price for green products.

Similarly, research by Ishaswini and Datta (2011) proposes from their study on 200 respondents that consumers' concern for the environment and their awareness level of eco-friendly goods greatly influences their green buying behaviour. Highly involved shoppers prefer to purchase eco- friendly goods but many are not willing to spend more on green products.

Since eco-friendly cosmetics are often pricier, less people have enough money to purchase them. Yet, the category is seeing an upsurge in need for environmental and natural products. (McIntosh et al., 2018). Green products are assumed to be costly (Essoussi and Zahaf, 2008; Vega-Zamora et al., 2014) and believed to be not as effective (Luchs et al., 2010; Lin and Chang, 2012).

While environmental apprehension is definitely a driver to influence green product purchase, yet it is not as powerful so as to demand a justifiable premium. This means consumers have a growing interest in green products, they wish to purchase it, but definitely will not pay a premium.

An empirical study conducted in the USA as mentioned by Drumwright (1994) depicted that 75% consumers purchasing decision was re-influenced by the reputation of the organizations‟ on environmental concerns and even 80% are willing to pay more for products that are environmentally friendly.  In Debora et. al.'s (2022) research, price was assigned a medium-high level of importance. Of the total responses, 47% agreed and 23% strongly agreed to whether they would be willing to pay a higher price for green personal care products.

It is observed that with a greater awareness of ethical and sustainable issues among consumers, moving forward, they do not mind spending more on products that are chemical free and environment friendly. Millennial consumers specifically, have started preferring environment friendly, socially responsible products and have come to be known as quick spenders tending the hedonistic consumption (López-Fernández, 2020).

Chhetri et al. (2021), conducted their survey among 250 millennials from different cultures, academic backgrounds, and income levels. Their paper established that millennial shoppers precisely, have started favoring eco-friendly, socially conscientious products and are tagged as quick spenders. The model used in the study was in harmony with the Theory of Planned Behaviour and concluded that millennials in India are willing to spend more for green and natural beauty products, with focus on individual and social norms, ecological concerns, attitudes of the individual, and buying intention. Additionally, the findings related to the demographic profile suggest that both male and female millennial respondents have a positive outlook towards green cosmetics. However, men are 12% more likely than women to pay a premium for green cosmetics in India.

Another study by Uddin and Khan (2016), revealed that young Indian consumers show a promising future and demonstrate positive signs of pro-environmental behaviour and they have the potential to transform their pro-environmental behaviour into final purchase.

Moreover, significant correlation exists between the income level and the willingness to pay (Thakur and Gupta, 2012). There is a theory that consumers that are willing to purchase green products have an income level that is satisfactory. Joshi and Gate (2024) has quantified the spend on green cosmetics in the study conducted in Chatrapati Sambhajinagar city on a sample size of 100. Most respondents spend 1000–3000 INR each month, on green cosmetics. According to Drăgan & Petrescu, (2013), consumers who had the highest intention to make a purchase were found to be college-educated women between the ages of 20 and 40 who had an average monthly income of 500 euros. This amounts to approximately $600 USD. Women who have completed their college education not only possess the ability to comprehend the advantages of organic cosmetics, but they also possess the financial means to purchase them.

The bottom line is that there is a perception that eco-friendly products attract a higher price, acting as a deterrent to adopting clean beauty products. As cited by Kapoor et. al. (2019), despite concern and awareness for the environment, Indian consumers are still hesitant to pay and consider the green cosmetics to be highly priced and of supreme quality, to be suitable for higher class. Consumers are willing to pay higher price to purchase a products/ services that purport environmentally friendly. Alston and Roberts (1999) found, in their research on environmental strategy and new product development, that there was a willingness to pay slightly more for environmental improvement in cleaning products than to sacrifice product performance.

Environmental concern is still not a strong motive for majority of well-educated respondents to purchase eco-friendly products (Ishaswini and Datta, 2011), since pro-environmental concerns among consumers in economically developed nations seem to be greater than the emerging countries such as India. Also, the green purchase behavior is not always a factor of the consumers' willingness to pay higher. For example, consumers who recycle waste may not want to buy products made from recycled material. Pickett-Baker & Ozaki (2008) suggest that an individual who is concerned about environment does not necessarily purchase eco-friendly products. The pro-environmental concern among consumers is likely to lead to green buying behaviour.

What could work is increased consumer demand to help reduce costs in production of eco-friendly products. Consciousness among consumers that their purchase can make a transformation to the ecosystem should be fostered to accelerate the consumption of environmentally friendly products.

Drawing a parallel from the lodging industry, the consumers are becoming aware of the benefits of engaging in environmentally friendly practices in the lodging industry (Manaktola, 2007). The positive attitude towards the eco-friendly conduct has a strong association with positive behaviour on green practices. However, this does not convert into the inclination to spend for the same. The hotel industry finding was that despite brand's positive eco-behaviour, majority of consumers were not agreeable to pay for such practices adopted by the hotel. Similarly, in the green consumption, especially related to food, there are constraints related to high prices as well as the limited choice of these products. For instance, Tsakiridou et al. (2008) conducted a study on a sample of 660 respondents to explore the attitudes and behaviour of Greek consumers towards organic food products. The study highlights the huge gap between the intention to purchase and the actual purchase of green products, due to the trade-offs between benefits and higher prices.

By proposing green products at inexpensive prices, buyers could be incentivized to change from conventional brands to eco-friendly alternatives (Bezawada and Pauwels, 2013). Therefore, Moser (2015) suggests that marketing activities should focus on creating a credible product image that emphasizes on the value of the product and its concrete benefits. It is important to note that brands offering green products should refrain from overpricing the product on the basis of it being 'green'.

Eventually, environmentally conscious consumers are likely to purchase green cosmetics but there has to be an effective trade-off between price and quality. Lack of familiarity with the manufacturer reduces the probability of consumer buying a product and it also reduces the chances of the consumer paying a premium. The organizations must understand and target their products at the customer segments which are able and willing to pay a premium for green goods (Gleim et. al, 2013).

Recent research by Moorthy and Srinivasan (1995) suggests that a unique way in which establishments can overcome the price/ quality obstacle is to propose a money-back warranty. Moorthy and Srinivasan (1995) found that such guarantees are an efficient way to indicate product quality and also allow vendors to drop prices and amplify volume.

From the Indian context, and something that this research paper will focus on, is how a lack of environmental knowledge coupled with the high prices and inconvenience of sustainable products are the main barriers to Indians becoming more eco-conscious.

Ultimately green marketing requires that consumers take the lead by 'Think Green, Think clean, Think Ecofriendly' (Maheshwari, 2014) i.e. they want a safer ecosystem and are prepared to "pay" for it, either through changing their lifestyle, adjusting to changed government regulations or even paying for higher priced products. Until consumers lead the movement, it will be challenging for companies alone to lead the green marketing transformation.

The main objectives of the current study are to determine the consumers' awareness of environmentally friendly cosmetics and to make recommendations based on the findings about their buying behaviour in Indian context.

**2.6 Sources of information and regulations**

Observed evidence shows that consumers' difficulty in locating environmentally directed products is partly due to a lack of information (Brown and Wahlers, 1998). Research regarding purchase intentions and behaviors is fairly nascent in India, owing to the lack of regulations. The lack of interference from authorities to set up a clear definitional criterion for what constitutes "clean" products has resulted in an increase in confusion and sometimes ambiguous information being passed on to the consumers.

According to Debora et al., (2022) most of the terms associated with green products are not regulated by law. Weiner and Doescher (1991) defines green consumerism as "pro-social" buyer conduct. Henion and Kinnear (1976) outlined green shoppers as those who are ecologically mindful while Antil (1984) linked it to a certain sort of cognizant behavior with principal emphasis on safety of the ecosystem. Polonsky (1994) wrote “green marketing as the marketing that consists of all activities designed to generate and facilitate any exchanges intended to satisfy human needs or wants, such that the satisfaction of these needs and wants occurs, with minimal detrimental impact on the natural environment.”

It is unassuming that individuals can execute pro-environmental actions without challenge when eco-friendly practices are regulated. Thus, either the industry forms their own standards, or provides some standards and recommendations to be followed by all parties when dealing with green products. While companies are required by law to declare the constituents present in their products, they use some jargons, which are not legalized or regulated.

Lack of policies in the business results in mistrust among the shoppers buying eco-friendly cosmetics. Thus, it is essential for manufacturers to postulate well-defined material about the clean cosmetic products and its subsequent advantages to well-being and the nature (Matić and Puh, 2016).

According to an editorial in the Washington Post issued by writer Elboghdady (2020), this entire trend is more complex since along with the Food and Drug Administration not having a clear definition for the term “clean” or other cosmetics terms, additionally, it is also not mandated to investigate or preapprove cosmetics along with their constituents, except for color extracts.

Unlike the food and drink category, the cosmetic industry deficits regulations with regard to the use of these terminologies. So, when a brand says the product is natural – it does not mean anything more than the fact that the constituents are non-synthetic and it has no artificial ingredients present. It is assumed that natural products should not be overly processed and should have their source from natural resources. Again reiterating, the term clean beauty provides not much about a product's real all-dimensional product sustainability, since it is not defined by any legal body.

There is usually a difference observed between belief and action – which means - what consumers opinion they do, and what they essentially do. According to Roberts and Bacon (1997), it is vital to quantify tangible versus self-reported buyer behavior. Researchers have learnt that there is higher correlation between attitude and behaviour in instances where real behaviors were evaluated when quantifying environmental outlooks and behavior (Hines et al., l987). Often, buyers commit something and in action, do another (Schlossberg, 1990). Here is where effective promotion comes into action. Marketing plays a fundamental part in growing consumer cognizance and linking the space between intent and purchase.

Compelled by a requisite for clearness, consumers look for accurate evidence from dependable sources. They are desiring to investigate and find out about the technical design and strength of actives in the products. With boosted online buys of personal and beauty care products, it gives shoppers a broader platform to explore information to understand about the ingredients. The absence of regulations and definitions of terminologies, sanctions the industry and online beauty influencers to create their own definition of clean beauty, which is often centered on buyer knowledge and opinions of "clean" instead of science (Nathan and Wanner, 2019). According to Nyugen-Viet and Nyugen (2024), businesses must participate in clear communication to intensify consumer faith. As we have been saying, building faith is significant. In order to influence the buyer's attitude and induce purchase, it is important that brands communicate effectively the benefits of green products. In order to keep up with the category, there is a need to provide green accreditation which will definitely impact attitude and intention regarding green products.

A requirement to be well-versed extends to safe formulations that demonstrate quick and evident outcomes (Sachar, 2020). “Conscious consumerism” has emerged which is nothing but consumers making careful choices on choosing beauty and personal care. This has resulted in growth in the requirement for clean beauty products which include safe and non-toxic components.

Hsu et al., (2017) in their report discovered that a consumer’s subjective norm, approach toward eco-friendly skincare products has a meaningful and affirmative influence on buying intent. They endorse on their data analysis that for brands looking to grow consumers’ buying intent toward eco-friendly skincare products, marketing communication via multiple channels like television, magazines, leaflets or the internet are some appropriate ways to transmit information and to induce their positive attitude. Based on the conclusions from Yadav and Pathak’s (2016) study, the marketers are advised to accentuate on stipulating proof on how can products be used. Environmental apprehension and familiarity have the greatest influence on the young consumer’s eco-friendly product purchase intention.

The diverse sources which are accessible to gather data on eco-friendly beauty products have amplified over the last few years. While originally the lone source of information was newspaper, television, out of home billboards, - all ATL (Above the line) campaigns, now brands have an option to explore many more BTL (Below the line) options as well – like referrals, influencers and expert opinions. A study by Maheshwari (2014) showed that even though buyers would be extra prone to choosing eco-friendly brands, they were incapable to recollect which are the green products/brands. This speaks volumes about the lack of marketing work put in by the green brand marketers in achieving consumer cognizance. The author established an ecological value-action gap - between buyers' theories and their corresponding behaviors about being ecological. The author recommends that those brands are more likely to sell higher volumes which are given greater publicity.

According to Bhatia and Jain (2013), the common sources of communication were newspaper and television to learn about green products. A study performed by Kalra et. al. (2024), conducted on population of postgraduate students enrolled in various colleges of Ludhiana city found that internet, relative or friends and TV were the more common sources of information of herbal products for the respondents as compared to doctor and retailers. This means word of mouth plays an essential role in adoption of eco-friendly products.

Seal et. al. (2024) clarifies how for the Indian subcontinent, the Green Marketing Mix is what determines how to target consumers, especially when targeting generation Y and Z. Furthermore, the study targeted 230 consumer's responses to comprehend the significance of consumers' ability and knowledge and how it affects their motive of buying. The author recommended that the ecological product which are thought to be Green and additionally also possess the correlated publicity campaigns and events have optimistically impacted purchase decision.

Patel, (2020) studies how buying behavior is impacted by rise in social media and peer endorsements, thus stressing upon the impact of digital platforms on beauty trends. With the market dynamic changing, there are evolved ways in which social media influencers contour consumer opinions and buying decisions. For vendors of clean beauty, this is a thought-provoking study to test the role of faith, genuineness, and ambitious lifestyle imagery in motivating buyer engagement with clean beauty brands on digital platforms like Instagram and YouTube. Thus, such companies that enthusiastically announce the source of their ingredients, details on production process, are also bolstering their bond with the consumers.

Social stimulus is a crucial cause in determining consumer purchase behaviour (Oyewole, 2001). So, brand manufacturers must inform the consumer about the harmful aspects of cosmetic products. Overall, progressive buying intention and word of mouth (Boztepe, 2012), is important for the advancement of clean cosmetics.

The obtainability of information and its accessibility especially about clean cosmetic products in the market considerably influences the consumers' pro-environmental conduct. According to Peattie, K (2010), learning about green buying is just about learning the variances in green and non-green products and their relative impact on consumer behavior, which may include price hikes, information and faith; as well as all the repercussions it can have. A study by Laroche et. al. (2001) on respondents residing in North-America discovered that it is imperative for marketers to publicize the accessibility of buying clean cosmetic products to alter the consumer insight in an affirmative way.

Owing to the point that clean beauty is a novel concept, makers must find dependable spokes-people, such as opinion front-runners or valued community figures, to deliberate the benefits of clean cosmetic products, for oneself and also the ecosystem. This policy will safeguard that accurate communication reaches consumers who are unacquainted with green cosmetic products, and in turn, positively ease their buying intent toward clean cosmetic products. Moreover, such networks can also upsurge consumer conviction by proposing applicable accreditation of clean cosmetic products one such is ecocert labels.

The trend toward influencer and social media marketing is growing and consumers are likely to make purchases of goods and services based on the recommendations of individuals whom they have faith in. Influencers and personalities play a vital role in instituting faith among their followers. The paper published by Sangeeta et. al. (2024) highlights the sophisticated association between social media influencers and consumer behaviour, particularly regarding the purchase decisions of Indian organic and non-organic cosmetic products. The study highlights for marketers that younger age groups, especially females aged 18-25 and 26- 35, are more active on digital media platforms such as Instagram, indicating the importance of influencer marketing targeting these demographics.

Biswas and Roy (2015) determines that the greatest encouragement behind sustainable consumption behaviour (SCB) originates from peer judgement and social appreciation. The study advices marketers involved in beauty category – with or without green accreditation – to adopt methods like under-promise and over-delivery, create ways to follow-up to reduce post- purchase conflict and any other way to prevent spread of negative word-of-mouth.

Gupta (2018) further investigates the emotional and representative significances of clean cosmetics, enlightening their role in buyer engagement and brand loyalty in the industry. Ways to connect meaningfully with consumers can include storytelling, imagery, and creating a brand personality. Park and Sohn (2012) advocates that promotional material and communication strategies for eco-friendly products are dependent on self-monitoring qualities. Hence, a marketing communication strategy focusing on a consumer’s personal eco-values and norms will be more effective to promote green products.

Ideally marketers must first understand the consumer attitudes and then come up with a perfect communication mix which helps maintain the eco-system and at the same time also deliver value.

## 2.7 Systematic Literature Review

Like highlighted in the literature, the last few years has noticed a substantial change in consumer preferences with a growing fondness for clean products. The number of studies has also grown. Of the 169 literatures reviewed for this research paper, there has been a rise in investigations on green and clean beauty in the last decade. This document digs into the study of this growing development, discovering the motivating reasons behind it and its probable influence on the ecosystem and companies.

*Table 2.1:*
*Literatures reviewed:*

| Publication Date | Number of Publications |
|---|---:|
| 1975-1984 | 4 |
| 1985-1994 | 9 |
| 1995-2004 | 25 |
| 2005-2014 | 78 |
| 2015-2024 | 53 |

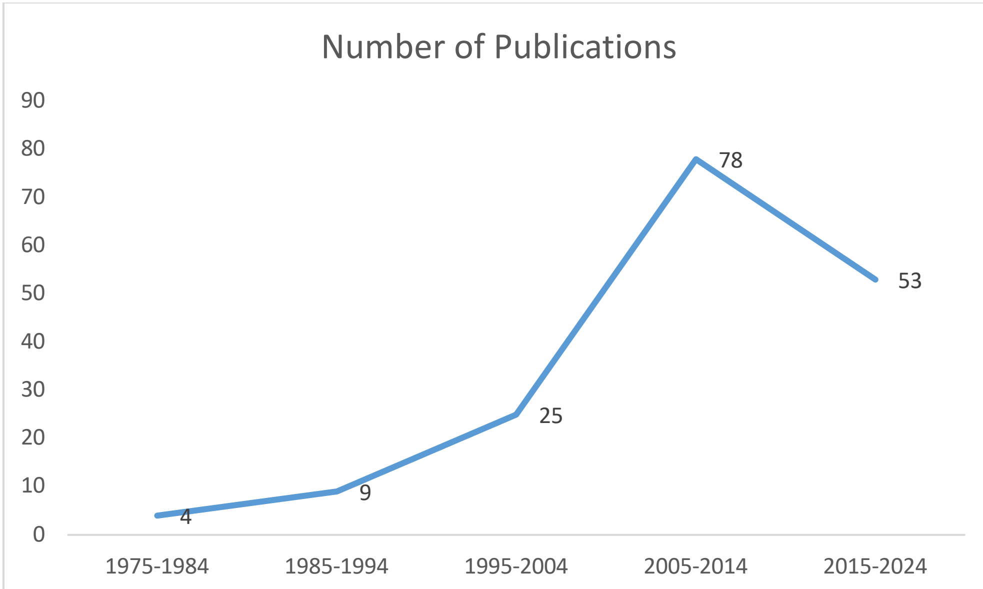


*Figure 2.1: Literatures reviewed*

The growing trend of clean beauty products cannot be missed. As awareness of the environment continues to grow and know-hows are advancing, there will be further studies and reports emerging. This changing trend denotes a substantial opportunity to study and market clean beauty products. The snowballing use of clean products mirrors an optimistic transformation in consumer behavior and a developing obligation to environmental accountability. However, some research gaps have been highlighted in the next section, which have formed the basis of the current study.

**2.8 Research Gap**

Even though there are many important parts of this category which remain undiscovered and will require some more digging, the quoted literatures have given some valuable insights on clean beauty promotion in India. This study aims to tackle these research spaces.

There have been studies dedicated on the buyers' behavior in India towards eco-friendly products. But in our awareness, none have deliberated the consumer's outlooks towards buying eco-friendly products using a sample size across the entire geography of the country. It is however understandable that the investigation on ecological issues and green buying is at a growing phase in the country when compared to other emerging countries (Khare, 2015). This is due to the fact that the market of clean beauty in India is unregulated, and there is an opportunity for descriptions and self-monitoring as discussed above.

Even though, many past studies have identified the gaps and issues in marketing green products in India, (Singh & Pandey, 2012), yet, there is lack of studies and papers which have considered a cohesive enquiry of them all (Maheshwari, 2014).

Much of the past published papers in India has been about broad outlooks or broad business policies (Paul et al., 2016). This research aims to understand green marketing attitudes across diverse demographics and topographies in India. This report targets to bridge this gap by inspecting the relationship between innumerable outlooks and consumer groups and their collective policies on clean beauty acceptance.

Much of the existing research treats each aspect of green marketing – information, awareness, factors and pricing as standalone papers. For example, studies are either based on awareness or marketing communication or price as a barrier. However, there is an absence of studies inspecting how the clean beauty category amalgamates with larger strategies in the Indian context. This paper aims to discover all these aspects as a whole, while still recommending potential consumer clusters.

**2.9 Summary**

In the last few years, the clean beauty and natural products have grown tremendously. This has impacted the environment, leading to concerns like waste generation, increased pollution, and also contamination of land. Through the literature review we can determine that the augmented consideration toward ecological sustainability and the growing consumers' consciousness has led to the birth of what we know today as clean beauty. Charmorro et al. (2009) advocated that every brand will eventually be producing products focused on eco-consumerism in forthcoming years.

The days of synthetic products and price dominating the buying behavior in India are far behind and with the advancement of the category, the industry has expanded massively in terms of product development. The usage of the cosmetic products today has become an essential part of the consumer's being. Clean beauty is therefore a drive that is all about clearness, faith and wellbeing for both consumers as well as the environment.

For the category to succeed, there have to be certain guidelines set out to overpower barriers of materials and cost. Rawat and Pande (2024) established that eventually, every step in the right way towards environmental products will impact any and every ecological challenge. This inconsistency between attitude and intent to purchase is due to the nonexistence of ethical products, incredulity of ethical claims and absence of information and faith (Tsakiridou et al., 2008; Cervellon et al., 2010). Hence what is vital for the growth of this category is government regulations.

While many papers and findings have been referenced in the above sections, the data from Indian context remains yet blur. This study therefore aims to examine clean cosmetics in India, the trends, consumer perceptions and possible grey areas. The application of this study is that it will aid brands to comprehend consumer's drives for purchasing green products, and hence help them improve strategies which are more consumer focused.

This research project will highlight the consumer perception to clean beauty and also determine their willingness to pay for clean beauty products. This will provide an insight for B2C companies on how to understand the consumer point of view better with respect to barriers to adoption.

India is growing rapidly and has one of the strongest infrastructures and younger populations along with being in the top for carbon emissions. This is the perfect moment for India, to cash in on these opportunities (Kumar & Ghodeswar, 2015) in implementing green marketing strategies the outcomes of this paper will have a straight impact on the overall beauty sector, especially the sustainable beauty brands – which are still growing.

## CHAPTER III:

## METHODOLOGY

### 3.1 Overview of the Research Problem

Owing to the growing nature of the industry and the increased focus on research in this field, it is important to assess if companies must continue to focus on clean beauty products and invest their time and money into marketing these product SKUs. Thus, it becomes necessary to oversee the understanding and attitudes of buyers for these products. Precise reports on consumer's green buying behavior are scarce for the beauty and personal care industry of India.

Moreover, conclusions from this report will aid companies to create their own appropriate promotion mix aimed at various demographics and their awareness and purchasing patterns.

This research aims at confirming the following hypothesis/assumptions:

1. The awareness of clean beauty in India is low.
2. Consumers in India look for safety when it comes to clean beauty products
3. Consumers are not willing to pay a premium for clean beauty products
4. Consumers look for reliable sources of information for clean beauty products

### 3.2 Research Purpose and Questions

This research paper attempts to assist in the process of more accurately understanding how to market clean beauty products to consumers in India.

To be precise, following are the research questions we are trying to focus:

1. What is the typical awareness of clean beauty in India?
2. What factors are consumers considering when purchasing a clean beauty product?

3. Are buyers comfortable with a price premium for a clean beauty product?
4. What are the channels of information regarding clean beauty products?

### 3.3 Research Design

The main purpose of the study is to ascertain the outlook of consumers to clean beauty products in India. With this as the aim, apart from the literature review completed to try and understand the past research done and to set the starting point for designing strategies, a primary research was carried out to obtain quantitative data by Mintel Group Ltd. - a global market intelligence agency.

Mintel has provided the author a contract with a non-exclusive, lasting, binding, all-inclusive, royalty-free right and consent to use the data, tables, graphs and charts from their report titled India Consumer Report - Clean Beauty - 2022. The quantitative data was collected by IPSOS Observer, shared with Mintel Ltd and then the statistics team has statistically analyzed the data. The findings were used to write the report titled - India Consumer Report - Clean Beauty – 2022 and are available on the Mintel portal. The excel file with the data was provided to derive findings and conclusions as part of the thesis.

The research method is as follows:

- a **quantitative virtual survey**- data and questionnaire formulated by Mintel Ltd and distributed to all participating respondents.
- The questionnaire contains questions starting with basic demographics, purchasing performance, media use, and leisure time events. (For the current study, simply questions discussing clean beauty were taken into consideration).

The questionnaire on clean beauty was then split into 4 major questions:

1. The first part of the survey was focused on specific questions on consumer’s knowledge and feelings about clean beauty.
2. The subsequent part entails influencers and factors considered when purchasing a product.
3. Third segment consists of factors on a 5 Point Likert Scale to quantify the consumer’s outlook towards clean cosmetics. These factors are also reflected in past researches (SS, 2018; Khan and Khan, 2013; Sharma et al., 2014).
4. Fourth part consists of what are the sources of information consumers reach out to when learning about clean cosmetics.

Questions were kept brief and well-defined to obtain precise answers, and participants were frequently asked to specify their level of agreement or disagreement on numerous statements vis-à-vis the distinctive topics.

**3.5 Population and Sample**

Mintel conducts face-to-face interviews with respondents illustrative of:

1. four extensive sections of India, including metros and cities in all tiers- 1, 2 and 3;
2. ages of respondents ranging from 18 to 65 years and
3. socio-economic classes A, B and C.

Mintel's research partner in India is Ipsos Observer, which is part of Ipsos India. However, from 2020 to 2022, the research was conducted using an online methodology due to the COVID-19 contagion. Hence this thesis is grounded on data collected from virtual survey conducted by IPSOS Observer for Mintel.

The total sample surveyed is 3000. Mintel with its data collection partner IPSOS Observer used quota sampling method to choose participants. Mintel operates interlocking rations on region by socio-economic group, age by gender and city tier by region. One drawback is that the sample is skewed towards the higher socioeconomic classes (A and B), because of the research done online.

### 3.6 Participant Selection

Instead of trying to echo the exact population of India, there were sample sizes chosen to offer analogous figures between age groups, regions and tiers.

The sample data can said to be a reflection of the urban Indians rather than typical of India as a whole. Although it does give a representation of the country's outlooks the research has been planned to stipulate analogous, hearty results for a wide scope of demographic divisions.

India has multiple cities which are actually diverse in terms of scope, economic progress, art, music, and literature, history and lifestyle. **Precise sample quotas** for a sample size of 3,000 respondents are as listed below.

*Table 3.1*
*Specific quotas for sample distribution*

| Region | City | Tier | N (3,000) |
|---|---|---|---|
| South | Chennai | Metro | 300 |
| | Coimbatore | Tier 1 | 150 |
| | Tirupur | Tier 2 | 150 |
| | Amravati | Tier 3 | 150 |
| East | Kolkata | Metro | 300 |

| | | | |
|---|---|---|---|
| | Patna | Tier 1 | 150 |
| | Bhubaneswar | Tier 2 | 150 |
| | Aurangabad (Bihar) | Tier 3 | 150 |
| North | Delhi | Metro | 300 |
| | Lucknow | Tier 1 | 150 |
| | Jalandhar | Tier 2 | 150 |
| | Ambala | Tier 3 | 150 |
| West | Mumbai | Metro | 300 |
| | Ahmedabad | Tier 1 | 150 |
| | Anand | Tier 2 | 150 |
| | Lonavla | Tier 3 | 150 |

In all regions, the sample consists of 75 men and 75 women for each of the below age groups:

- 18-24 years
- 25-34 years
- 35-44 years
- 45-54 years
- 55-65+ years

*Table 3.2:*
*Specific sample distribution based on socio-economic classification*

| Region | N (3000) | A (%) | B (%) | C (%) |
|---|---|---|---|---|
| South | 750 | 40 | 28 | 32 |
| East | 750 | 27 | 33 | 40 |

| | | | | |
|---|---|---|---|---|
| North | 750 | 45 | 29 | 26 |
| West | 750 | 34 | 34 | 32 |

**3.6 Instrumentation**

The study is established on primary data, gathered and organized by Mintel Ltd., using a questionnaire survey from over a sample collection of 3000 men and women from India. The respondents for the survey were chosen through "quota sampling" method. Data was gathered using a survey form. Secondary data was gathered in the form of articles and reports published in books, periodicals, publications, research papers, and tabloids were also incorporated.

The data and numbers incorporated in this report has been used in the past for research report titled Clean Beauty – Indian Consumer – 2022, published by Mintel analysts. However, I have also made sure to review the excel file, data points and statistical analyzed data and incorporate my findings independently in this thesis.

The data was collected using a questionnaire. According to Sarmad et. al. (2007), if the questions related to the computing tools, are the characteristic of qualities and specific skills that intend to quantify them, the investigation has dependability for content. The questionnaire has five sections like mentioned above. The opening part concentrated on the demographic types of the participants. The second part was focused on their awareness levels of clean beauty and factors they consider when purchasing a beauty product. The third part was designed to capture their sources of information.

The fourth question was designed keeping in mind to try and achieve consumer clusters. Hence an attitude question was used which involved likeability and acceptability, and hence the Likert Scale was used. A Likert's five-point scale format (from 'strongly agree = 1' to 'strongly disagree = 5') was used in this study for attitude questions. The five-point Likert scale format is considered apt to reduce the hindrance level of the respondents, and intensify the attribute of the responses (Lam, 1997).

When responding to such questions, respondents stated their level of disagreement or agreement on the Likert scale for particular statements. Thus, the scale range apprehended the amount of their feelings.

The last question was to understand the future of the study, by asking participants what they would be willing to pay more for.

Hence the questionnaire has tried to capture the current understanding of the participant, the consumer groups to focus on and what are consumers looking for allowing brands to enhance their offerings in the future.

### 3.7 Data Collection Procedures

IPSOS Observer for Mintel carrries out the CAPI (Computer assisted personal interview) using internet-enabled Android tablets. IPSOS usually recruits respondents in their panel using address-based sampling (ABS) methodology to ascertain complete coverage of all households in the country.

In an effort to attain the prerequisite quotas for age, socio-economic group, and gender, the interviews are usually carried out door-to-door in the seven local languages which are spoken in India namely - Hindi, Marathi Gujarati, Oriya, Bengali, Telugu and Tamil). Respondents are moreover offered the choice to fill the questionnaire in English if they wish to do so.

Mintel applies the following four layers of quality checks:

1. Accompanying the interviewer on 2% to 5% of the total sample
2. Phone checks on 20% of the total sample
3. Interview audio file assessment on 20% of the total sample

4. Automated GPS location of the interviewing place in all cases

### 3.8 Data Analysis

The primary analysis done after quality checks is the significance testing. Statistical confidence levels of +/- 2% or 3% is used for the data, conditional on total sample size and percentage of respondents. For example, in a sample size of 1000 respondents, if 20% say that they agree something, it is with 95% certainty that the percent for the population is somewhere between 17% and 23%. For a sample size of 3,000 respondents, similarly, it is with 95% certainty that the figure lies between 18% and 22%.

Consumer research is kept in an online databank overseen by Mintel's statisticians. Added exploration of data is also carried out, like in this report too some are included. Statistically, Mintel for a population sample of 3000 suggests to apply a confidence level at 95% with a margin of error of 5.66%. Hence figures with a 95% confidence level were considered significantly different. Such figures and percentages are highlighted in the thesis and recommendations are based on them.

#### 3.8.1 TURF Analysis

Further analysis was carried out and provided by Mintel. One was TURF Analysis on the question asked about features that consumers are willing to a premium for. TURF (Total Unduplicated Reach & Frequency) study classifies the mix of descriptions, elements, or communications that will appeal to the greatest number of exclusive respondents. It is classically carried out when the quantity of qualities or elements must be or should be controlled, but the aim is yet to influence the largest possible population. By recognizing the Total Unduplicated Reach, it is probable to amplify the number of individuals who find one or more of their favored qualities or characteristics in the product line. The resultant yield from TURF is a summation, with each extra characteristic snowballing the total reach. The graph is read from left to right, with each arrow signifying the incremental change in overall reach when adding a new characteristic. The final bar in the graph symbolizes the full reach of the total population when all indicated characteristics are offered.

### 3.8.2 Cluster Analysis

The other analysis carried out by Mintel statisticians was the cluster analysis. This technique allocates a set of distinct people into groups – also called clusters on the basis of one or more answers, so that those individuals within the same cluster are in some sense similar to each other than to those that were grouped into a different cluster. This is called psychographic segmentation which uses the K-means cluster approach that is based on attitudinal (psychographic) statements measure on a 5-point Likert scale. Psychographic segmentation divides the sample based on the respondent's personalities, values, attitudes, interests and/or lifestyles because this is more relevant than just dividing consumers based on demographical information. Respondents were shown the attitudinal statements from question 4 of the section and they rated their responses on an agreement scale – from 1 (strongly disagree) to 5 (strongly agree).

Next, the results were grouped into common "themes" using factor analysis. A factor solution shows factor loadings, meaning correlations between statements that form a given factor or theme. The higher the number in the component matrix, the better a statement is able to discriminate between themes. Cluster analysis, which allocates respondents into groups, is then conducted based on the factors (themes) found in the factor analysis. The cluster groups found (from cluster analysis) will show significant differences in attitudes. Ideally, each group should be quite different from other groups when crossed with the factors. During the analysis stage, the report writers of Mintel allotted names for the clusters.

### 3.9 Research Design Limitations

The current study was grounded on a study conducted through survey forms. Since clean beauty has various perceptions and definitions, with no clear regulation, one key difficulty was the absence of knowledge about the research topic. Consequently, the subject had to be clarified to the bulk of the population.

Alternatively, the survey was distributed only digitally. Thus, not all groups of the population got a chance to contribute to the findings. Respondents were required to fill out their demographic data and purchase attributes, intentions and attitudes through a web-based questionnaire, which could have affected the data collected and subsequently the inferences drawn from it. However, with this type of quota sampling and structured questionnaire, there were some interesting and important data points relating to consumers' attitudes, which were essential determinants on clean beauty purchase behaviour.

Although the report proposes an assorted population with people from diverse scholastic and demographic backgrounds, a few essentials that underwrite the differences at an innate level may have not been deliberated. Just like many researchers such as Kumar et al., (2017); Jaiswal and Kant (2018), lack of supervision in online surveys was a drawback for ours too. There is thus a possibility to study and report these factors additionally by future research scholars. The current study is only quantitative and moving forward, there is scope to include qualitative factors association studies, feelings, mystery shopping as well. Thus, as pointed out by Kozup et al. (2003) while a survey is usually a common way to collect data, there are drawbacks with respect to the setting, mood and response behavior of participants. Therefore, the quantifiable numbers in actual purchase scenarios may be different.

### 3.10 Conclusion

Notwithstanding these confines, this report is expected to be a starting point for all future research in this field. The ultimate purpose of this thesis was also to bring together past knowledge and understand consumer feedback across the topographies of India. This is particularly important, since the number of products and brands in this category are growing and this is the perfect time for the industry to come together and introduce regulations and guidelines based on consumer awareness and needs.

If through this research, more brands are informed about the arguments and gaps which are discussed, there is more scope for clear messaging and more strict regulations for the cosmetic industry.

CHAPTER IV:

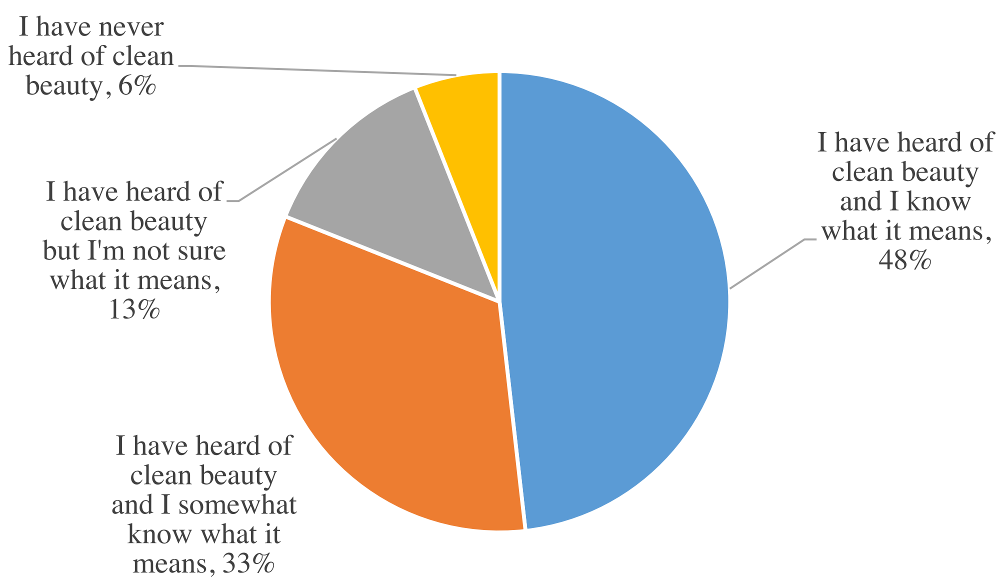
RESULTS

Despite a growing need for more sustainable behaviours, the participants continue to be minimally engaged with clean beauty as a holistic concept. Consumers perceive clean beauty to be challenging, pricey and often confusing. Brands need to work to better educate consumers on various clean beauty concepts in hopes of bridging their knowledge gaps and making purchasing a more attainable goal.

**4.1 Research Question One: Awareness of clean beauty in India**

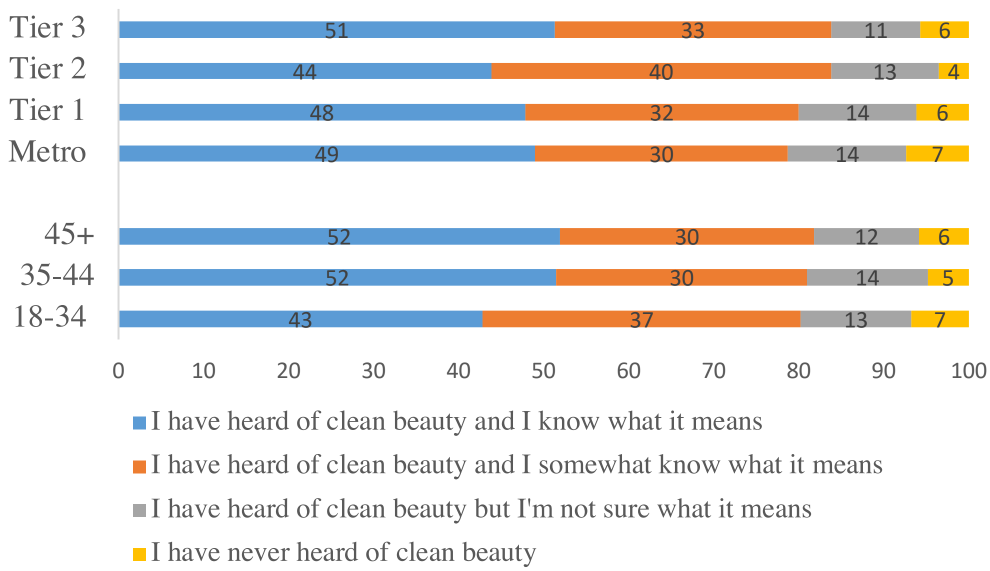
Natural, organic and safe to use are perceived to be the most impactful clean beauty practices. In contrast, consumers are less likely to understand more abstract concepts such as the impact of limiting resources and packaging, or the consequences of carbon emissions in the manufacturing process.

*Figure 4.1: Percentage of Consumers Aware of Clean Beauty*



On a very basic level, the consumer awareness in India is superficial. Close to half (48%) of the population actually knows and understands what clean beauty mean. The other half have vague knowledge or have not even heard about clean beauty as a concept.

*Figure 4.2: Percentage of Consumers Aware of Clean Beauty by Age Group and City Tier*

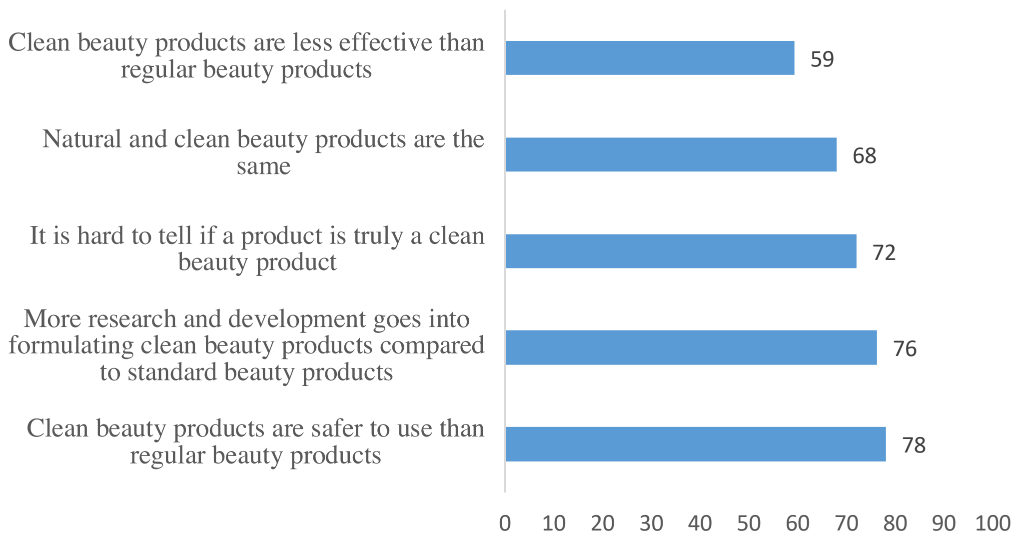



Knowledge of clean beauty and the basic understanding of it varies greatly across the length and breadth of India. While 43% of 18-34-year aged consumers, 52% of 35-44-year aged consumers and 52% of 45+year old claim to have heard of clean beauty and also agree to know what it means, 37% of the younger population, especially the 18-34-year-old somewhat know what clean beauty means.

This percentage is significantly higher as compared to other age groups. Similarly, 40% of Tier 2 city residing consumers have vague knowledge about clean beauty. In a population where less than half are confident about the meaning of clean beauty, it is difficult for a concept to survive.

This is particularly important because while the understanding of clean beauty is important, it is also imperative that brands make sure consumers have the correct information regarding clean beauty. False claims and information will only lead to mistrust among consumers which could in turn harm brand value.

*Figure 4.3: Percentage of Consumers who Agree to Certain Statements about Clean Beauty Products*




Clean beauty is a novel theory to India and is forecast to develop more in the approaching years. However, unsolved issues remain. The first issue is that buyers do not have a well-defined understanding of what clean beauty is – more than half of consumers do not know how to communicate whether a product is truly a clean cosmetic or not.

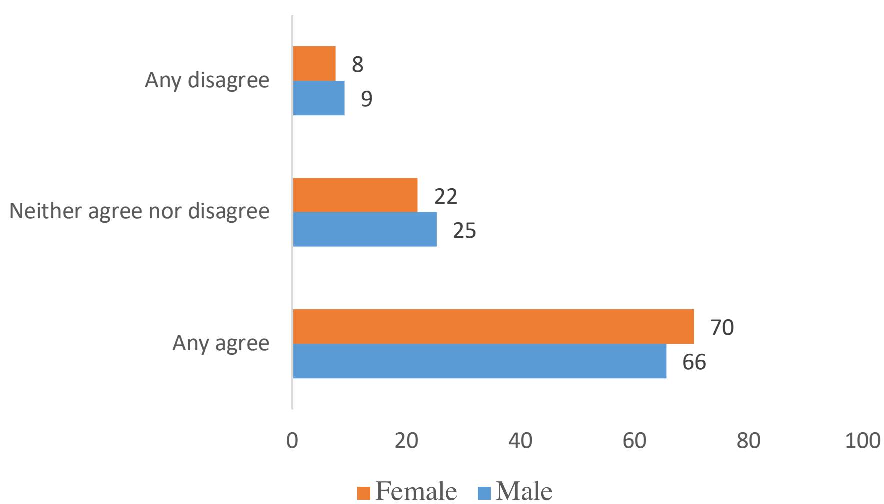
Close to 7 of 10 Indian consumers agree that natural and clean beauty products are synonymous and 72% of Indian consumers find it tough to say if a product is actually a clean beauty product.  59% of respondents have no faith in clean beauty products and assume that they are less effective than regular beauty products. This is probably because they believe that a clean, safer product might not contain ingredients which are effective enough to perform.

That consumers consider natural and clean beauty products synonymous, shows how deeply ingrained the natural narrative is for them.

India's population is clearly divided into the knowns and unknowns. Having said that a set of consumers do not believe in the narrative of clean beauty, there is a set of 76% consumers who believe that a lot of research goes into formulating a clean beauty product. Similarly, 78% consumers also believe that clean beauty products are harmless to consume than non-clean conventional beauty products.

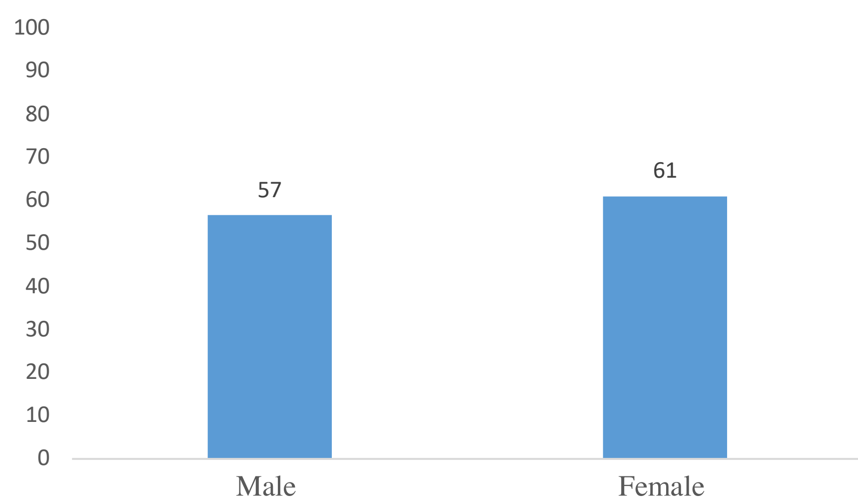
Moreover, shoppers tend to treat their familiar beauty brands as clean brands, due to a lack of industry guidance and knowledge of clean beauty brands. This proposes the inevitability of creating industry unanimity to direct companies/brands, and getting shoppers involved through education.

*Figure 4.4: Percentage of Consumers who Agree to the statement "natural and clean beauty products are the same" by Gender*



Although some literatures suggest gender differences are minimal when it comes to green beauty decisions, our data reveals that females are more probable to overlap clean beauty with natural. 70% of females agree that natural and clean beauty are synonymous compared to 66% of men, which by statistical analysis is significantly higher. Men on the other hand are on the fence, with 25% men who neither agree nor disagree to this statement compared to 22% of women.

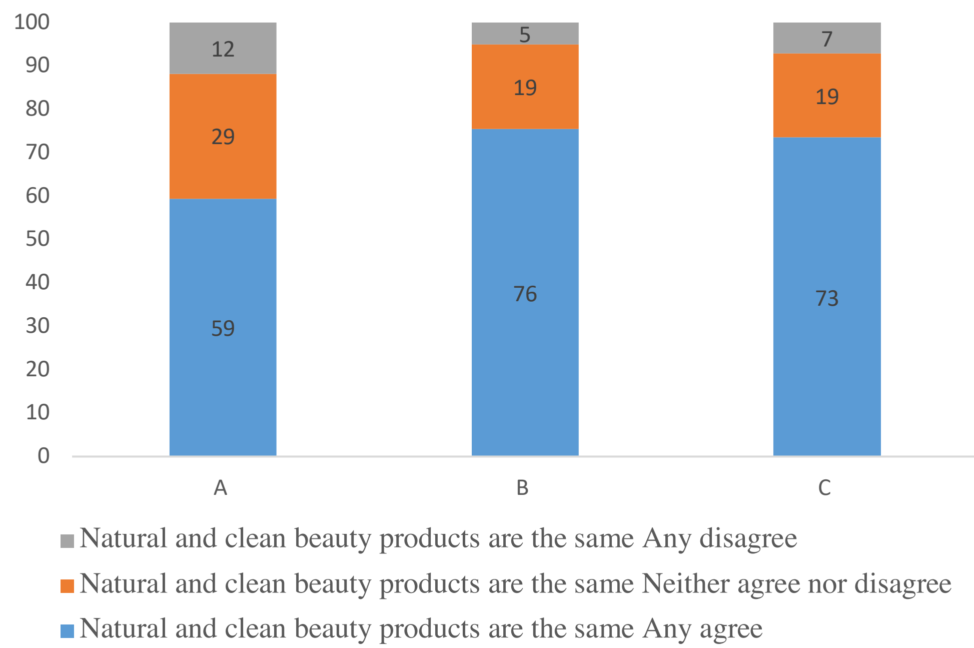
*Figure 4.5: Agreement to "clean beauty products are just a fad", by gender*




Clean beauty is considered a fad by women. As clean beauty has not yet associated itself strongly with a clear proposition, Indian consumers currently consider of clean beauty as only a trend or a fad label being used by brand manufacturers. Education can help define clean beauty for the Indian consumer and give it a deeper meaning, as seen in global markets.

On one hand women are over indexing on overlapping natural and clean, and on the other 61% women consider clean beauty products as just a fad compared to 57% men. We have already established that women are regular users of beauty products and women use more beauty products than men and this finding will help brands to modify their narrative around clean beauty.

*Figure 4.6: Percentage of Consumers who Agree to the statement "natural and clean beauty products are the same" by Socio-Economic Group*




With clean beauty lacking a clear definition and evolving in each market according to that market's trends, it is no surprise that clean beauty has tied itself closely with the natural conversation, which is why the narrative to natural is higher for consumers on the whole.

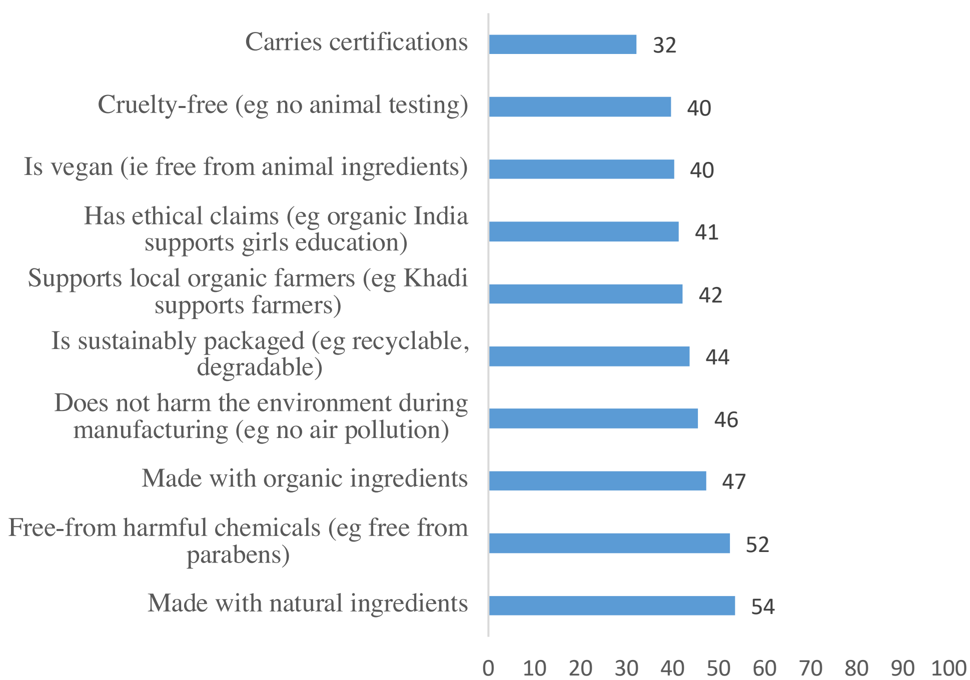
The figure above indicates that 73% of consumers in lower socio-economic groups actually agree to the narrative that natural and clean beauty are analogous compared to 59% in socio-economic group A. This also indicates how access to more brands, education and income tends to drive the clean beauty narrative.

However, since natural is the dominant claim in India's cosmetic business and given the lack of regulations in the country, simply being natural will not be sufficient to lead the clean beauty movement forward. In order to attract more consumers, brands will need to start with education first.

### 4.2 Research Question Two: Factors consumers consider when purchasing a beauty product

Although innovations in clean beauty has ensured that products have at the least one eco-claim associated with it, a blurry definition of 'eco', shoppers might not necessarily regard all eco/ethical products as genuinely more sustainable. When respondents were asked the question, they were given a list of which they had to choose the top 5 and rank them. These responses where then collated and analyzed as follows:

*Figure 4.7: Percentage of Consumers who Rank the 5 Most Important Factors They Consider When Choosing a Beauty and Personal Care Product*



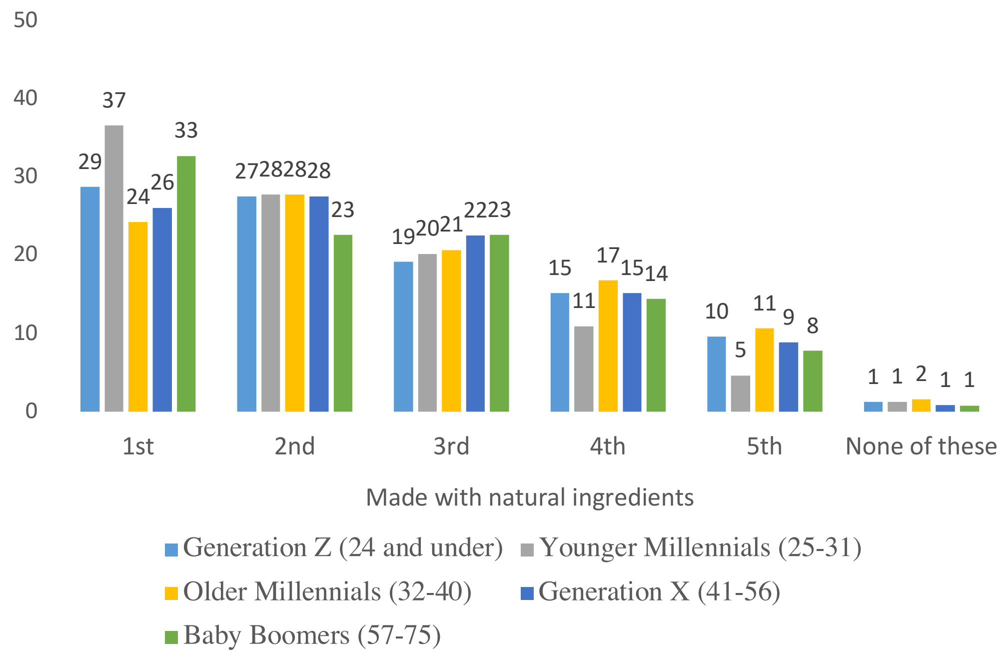

As established earlier, natural is considered synonymous with clean beauty. 54% of Indian consumers look for natural ingredients when purchasing any beauty product.

Being made with natural ingredients is the most important factor consumers look for in beauty products, which is why clean beauty has strongly attached itself to the natural narrative. Being free of harmful chemicals is the second-most important factor (52%) that consumers look for in a beauty and personal care product, again signaling consumer attention to self-preservation. Organic ingredients and natural ingredients go synonymously, with 47% consumers looking for organic ingredients in their beauty product.

Consumers are worried about the ecosystem, like discussed in the past literatures as well. 46% consumers look for products which do not harm the environment, 44% look for products that are sustainably packaged and 42% look for brands that support local farmers and 40% look for merchandise that has not been tried on animals.

With the knowledge growing about beauty brands, ingredients and certifications, 41% consumers look for sustainable claims and 32% look for certifications in their beauty products.

*Figure 4.8: Percentage of Consumers who Choose "Made with Natural Ingredients" as a Factor while Choosing a Beauty Product, by Generation*

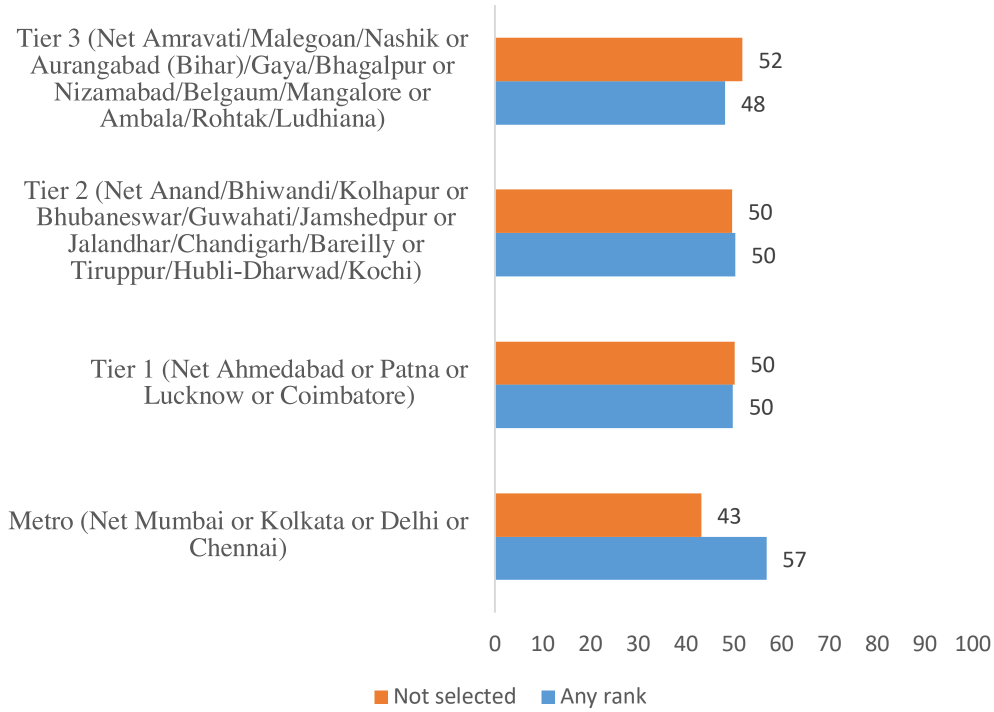



Consumers were asked to choose the top 5 criteria when deciding which beauty/personal care product to buy. The graph above shows responses for "made from natural ingredient" only and the breakup by age on which rank they chose for this criterion.

All age groups more or less consider "made from natural ingredients" as one of the top 5 things they contemplate about when selecting a beauty/personal care product. But younger millennials aged 25-31 years (37%) are most likely to consider "made from natural ingredients" as their topmost criteria when choosing a beauty product, followed by 33% of baby boomers (aged 57-75 years). For brands looking at targeting younger millennials, it would be advisable to use the "natural" narrative to make them aware of clean beauty products.

This is particularly important since India is driven by a larger millennial population. Usually the brands in any category target their offerings and communication to this sub-section of the population.

*Figure 4.9: Percentage of Consumers who Choose "free from harmful chemicals" as a Factor while Choosing a Beauty Product, by City Tier*



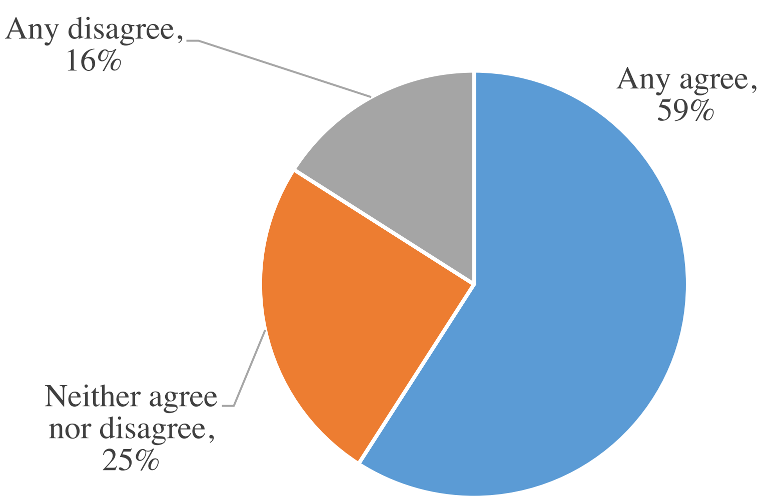

The practice of using natural ingredients is deeply ingrained with Indian consumers; therefore, clean beauty brands cannot disassociate themselves from it. Focusing on ingredients will be key to growing the movement in the country. With the natural narrative deeply ingrained in India, it is no surprise that clean beauty has strongly latched onto it. However, natural is also omnipresent in beauty products and will not be enough to differentiate clean beauty.

Apart from natural ingredients, proving the authenticity of ingredients and focusing on free-from claims can help kick off the movement in metro cities. Metro cities are anyways struggling with pollution issues and hence it is not surprising that 57% metro dwellers are actually considering free from harmful chemicals as one of the top 5 criteria when choosing a beauty product.

### 4.3 Research Question Three: Willingness to pay extra for a clean beauty product?

While proactive sustainability solutions are what consumers agree is needed, more than half of the consumers concur that it is not of any merit to pay more for a clean beauty product. Even if many consumers show interest and have good intentions, eventually, financial wellbeing and current economic factors are likely to take prioritization at some stage in life.

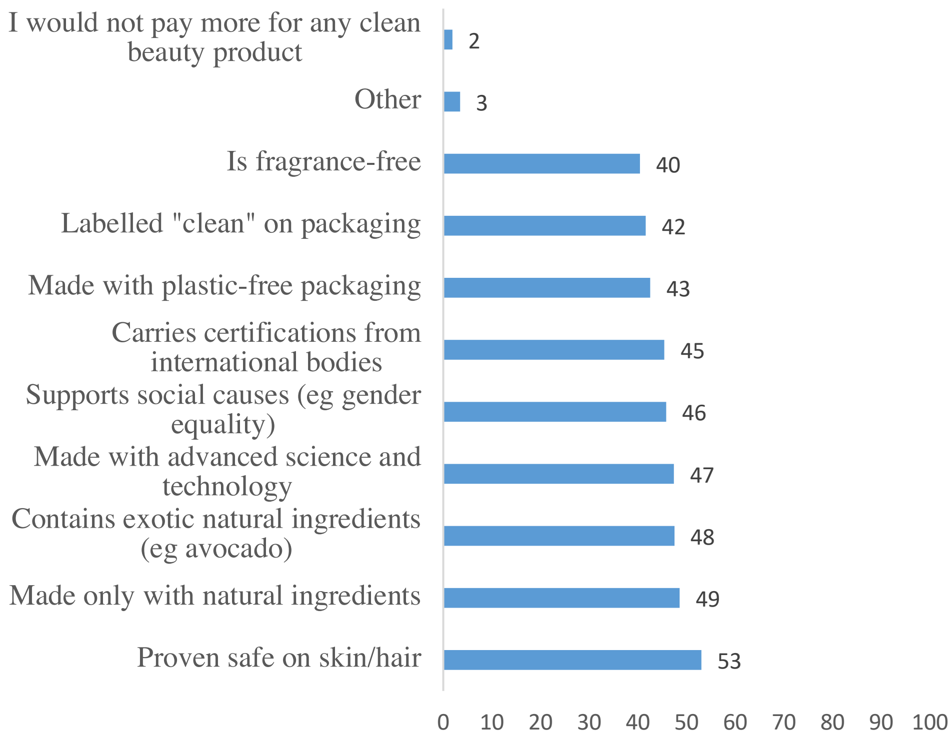
*Figure 4.10: Percentage of Consumers who agree to "It is not worth paying more for clean beauty products"*




Generally, the perception is, eco-friendly products attract a higher price, acting as a deterrent to adopting clean beauty products. Our findings also highlight the same. 59% of consumers agree that it is **not worth** to pay extra for a clean beauty product. 25% are on the fence and only 16% disagree.

The launch of clean beauty products positioned it to be premium and something exotic that could not be a mass generic product. However, if this is a hinderance to the growth of clean beauty products although there is a demand for such products, then there is scope for brands to also focus their formulation and development to offer clean products to the masses at affordable price points.

*Figure 4.11: Percentage of Consumers who are Willing to Pay More for Specific Features in a Clean Beauty Product*



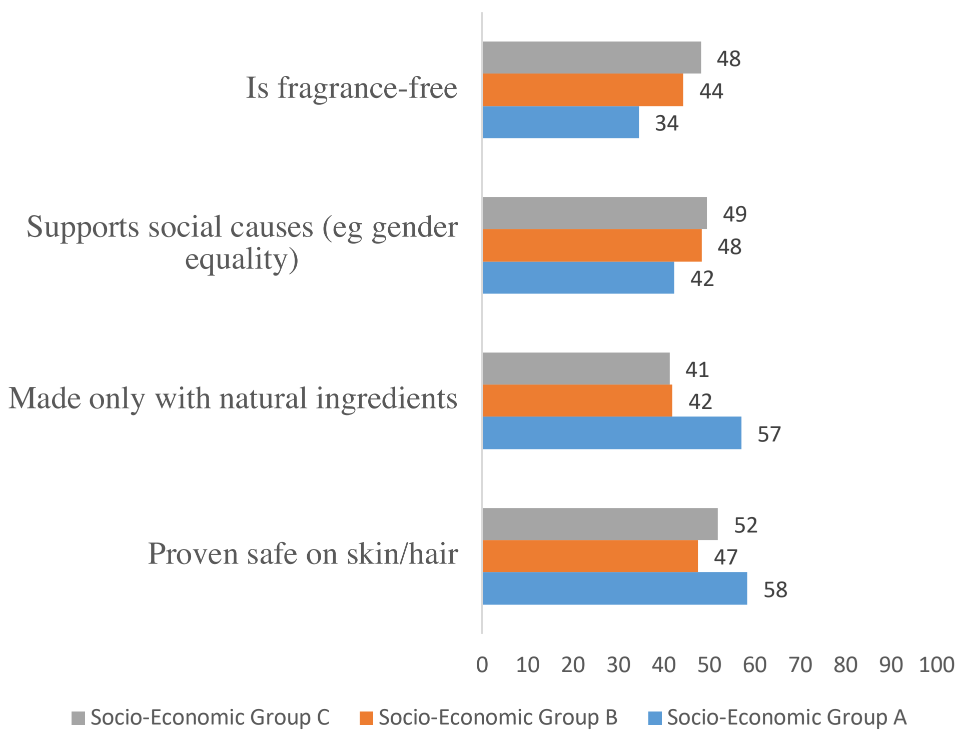

Safety is fundamental for consumers, which is why 53% of consumers would be agreeable to spend more for a clean beauty product if it is established harmless on skin/hair. Hence, brands can back safety up with accreditations, symbols, scientific trials and cutting-edge science and technology to ascertain clean beauty as a safer choice. Focus on safety to propel clean beauty in India and cross the barrier of unwillingness to pay.

Also, the natural narrative will always be dear to Indians with consumers looking for natural ingredients and claims as a proof of non-toxicity. 49% of Indian consumers are agreeable to pay more if a clean beauty product is made only with natural ingredients.

And 48% would pay more if the product contains exotic natural ingredients. 47% consumers would consider science and technology as a reason to pay extra for a clean beauty product.

It will not be easy for brands to tread the "clean beauty" way, because while clean beauty encompasses a lot more than just natural, it is also the only thing so dear and trusted by Indians.

*Figure 4.12: Percentage of Consumers who would Pay More for Select Features in a Clean Beauty Product by Socio-Economic Group*




Safe on skin and natural ingredients is something which would relate more with high socio-economic groups. 58% of consumers from socio-economic group A would pay more if the product is proven safe for skin/hair compared to 47% consumers from socio-economic group B. Similarly, 57% consumers from higher socio-economic groups would pay more for products made with natural ingredients, compared to 41% from group C. This is probably because natural ingredients are native to India and consumers see no reason why they should be labelled exotic or premium.

On the other hand, fragrance-free would resonate more with lower socio-economic groups. This is an interesting finding, because natural and safe claims are so penetrated in the Indian market that they are considered common. For the lower socioeconomic groups, clean beauty is such an exotic concept, that they expect more exotic claims to be willing to shed out more money.

When Mintel conducted a TURF analysis, it was evident that though safety and well-being is a top-of-mind characteristic, but incorporating exotic natural ingredients makes it more desirable.

*Figure 4.13: TURF Analysis – factors in a clean beauty product for which consumers are willing to pay more for*

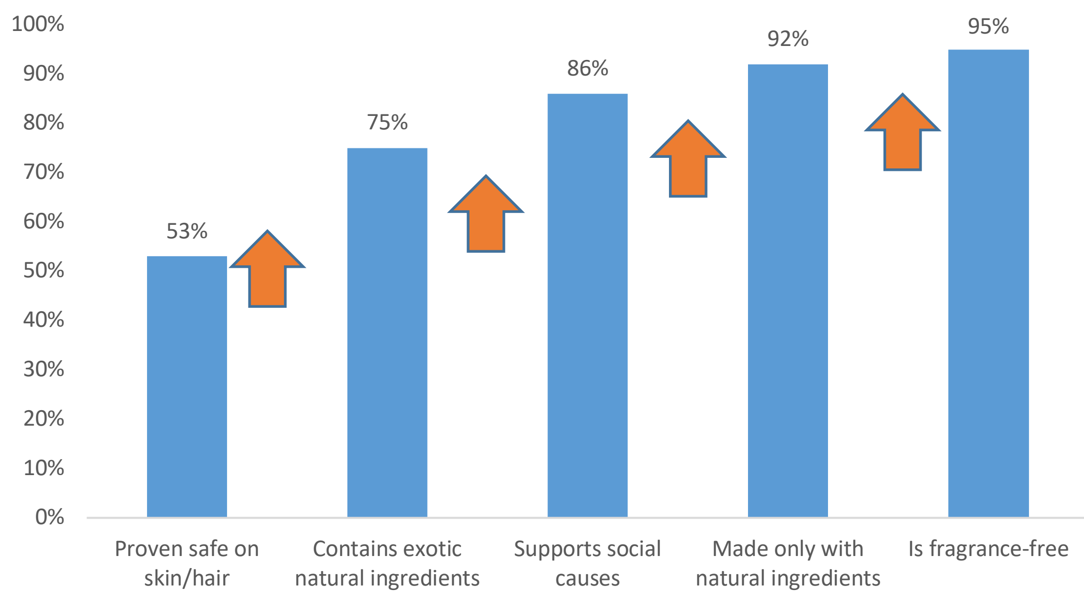



*Table 4.1:*
*TURF Analysis – purchase factors for a clean beauty product*

| PURCHASE FEATURES FOR A CLEAN BEAUTY PRODUCT | TOTAL REACH (%) | INCREMENTAL % |
|---|---|---|
| Proven safe on skin/hair | 53% | |
| Contains exotic natural ingredients | 75% | 22% |
| Supports social causes | 86% | 11% |
| Made only with natural ingredients | 92% | 6% |
| Is fragrance-free | 95% | 3% |
| Carries certifications from international bodies | 97% | 2% |
| Made with plastic-free packaging | 98% | 1% |
| Labelled “clean” on packaging | 98% | 0% |
| Made with advanced science and technology | 98% | 0% |

Safety is fundamental in clean beauty, hence ‘proven safe on skin/hair’ will reach 53% of consumers. However, natural will continue to be a big draw, with exotic natural ingredients giving a total reach of 75%, with an increment of 22%. Further, adding of social causes can give an additional increment of 11%, and ‘made only with natural ingredients’ that of 6%, together raising the reach to 92% of Indian consumers.

**4.4 Research Question Four: Sources of information regarding clean beauty products?**

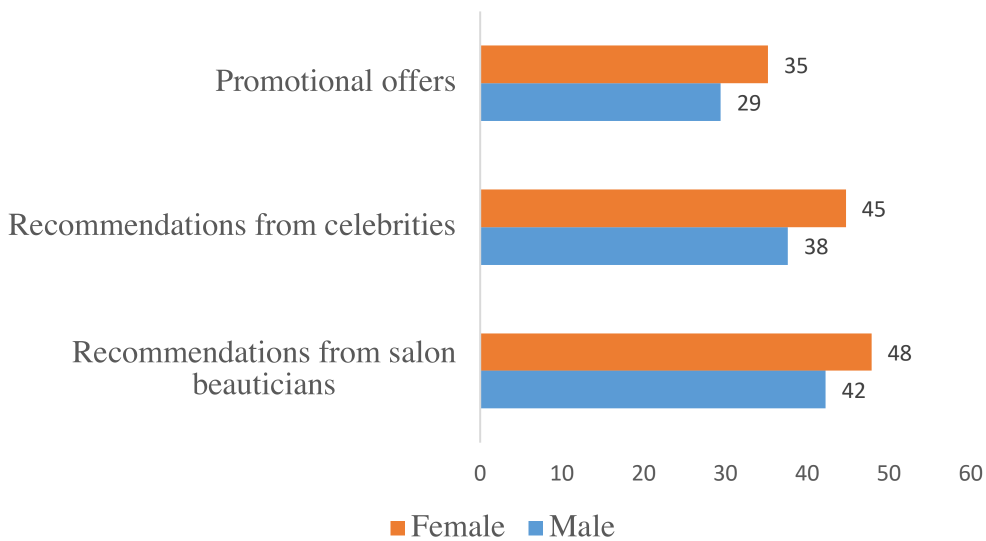
When trying any new brands be it clean beauty or not, India has seen a clear mindset shift. There was a time when Indians would be relying a lot on celebrity endorsements. Now with changing times and penetration of social media, homegrown brands and advertising regulations, word of mouth and expert recommendations is the most reliable source of information.

*Figure 4.14: Percentage of Consumers and their Sources of Information about Clean Beauty Products*


Over 5 out of 10 of Indian consumers would prefer brands recommended by friends/family and 49% would listen to dermatologist/doctor recommendations. Close enough is salon beautician recommendations with 45%. Consumers are becoming more aware of actual information versus paid content now. There is growing interest in influencers and it is interesting to see how 42% consumers would buy a product based on blogger recommendations. India has been driven by celebrity endorsements and TV commercials. But the growing digital age has reflected in the data, as 39% consumers are driven by TV advertisements and 41% by celebrity endorsements, compared to 42% for bloggers.

For new brands or established beauty brands vying to grow their clean beauty portfolio, they can invest more for expert recommendation channels to build a clean beauty narrative in the country.

*Figure 4.15: Percentage of Consumers and their Sources of Information about Clean Beauty Products by Gender*




While overall numbers indicate both genders equally trusting recommendations, women tend to incline more towards salon beauticians (48% vs 42% for men) and celebrities (45% vs 38% for men). Additionally it is not surprising that 35% women vs 29% of women look for promotional offers on purchase. To sum up, for brands to thrive, they should leverage the help of up-to-date networks of information.

In the next sub-chapter, the Indian consumer has been put into segments to understand and deep-dive further into their attitudes.

## 4.5 Consumer clusters

A cluster analysis was performed on consumers' attitudes towards clean beauty. This helped to identify four consumer segments. The names of clusters are modified from the original names which are published by Mintel.

Cluster analysis method looks at consumer groups through a different lens, focusing on their shared attitudes towards clean beauty rather than who they are demographically.

Based on the attitudinal question in the questionnaire, the following component matrix was derived:

*Table 4.5.1: Rotated Component Matrix*

| | Component | | | |
|---|---|---|---|---|
| | 1 | 2 | 3 | |
| Q19r5: Clean beauty products are less effective than regular beauty products | .731 | | | Clean beauty non-believer, ignorant about clean beauty products |
| Q19r6: It is not worth paying more for clean beauty products | .720 | | | |
| Q19r4: Clean beauty products are just a fad | .715 | | | |
| Q19r9: Clean beauty products are not easily available | .586 | | | |
| Q19r10: Natural and clean beauty products are the same | .518 | .354 | | |
| Q19r1: Using clean beauty products relates to living a healthier life | | .735 | | Clean beauty believer |
| Q19r2: Clean beauty products are safer to use than regular beauty products | | .693 | | |
| Q19r3: More research and development goes into formulating clean beauty products compared to standard beauty products | | .687 | | |
| Q19r7: It is hard to tell if a product is truly a clean beauty product | | | .870 | Unsure, confused about clean beauty |
| Q19r8: Brands just use clean beauty labels to appear trendy | .406 | | .520 | |

The statistical algorithm groups similar responses together; which means the likelihood of a respondent choosing similar responses are grouped as factors.

Based on the matrix, the factors are crossed with the sample size of 3000 and groups are allocated. The following table shows the results when groups are crossed with the factors.

*Table 4.5.2: Consumer clusters*

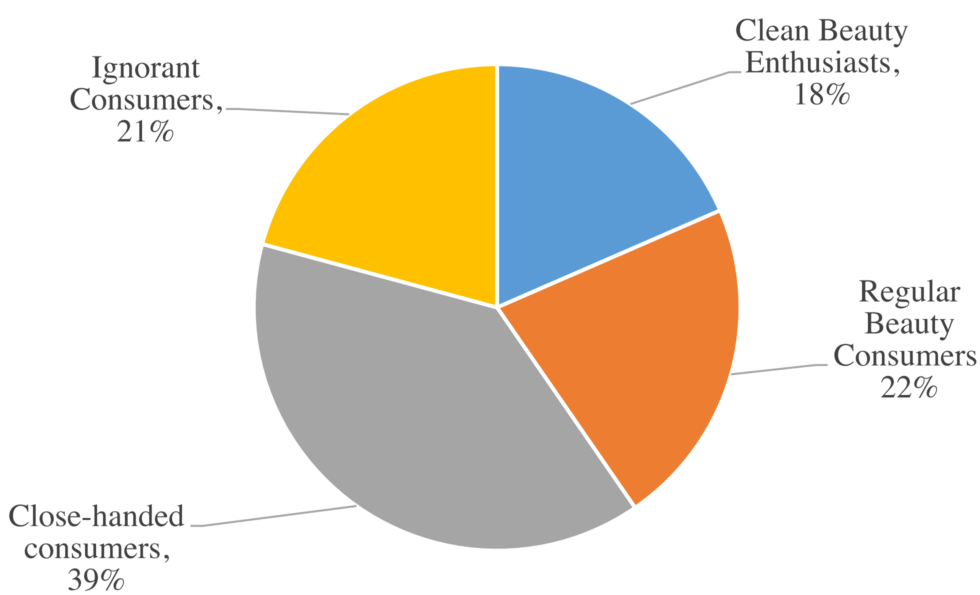
| | **Group 1** | **Group 2** | **Group 3** | **Group 4** |
|---|---|---|---|---|
| Sample size | 554 | 624 | 658 | 1164 |
| | | | | |
| Factor 1 - Clean beauty non-believer, ignorant about clean beauty products | -1.42 | -0.38 | 0.65 | 0.51 |
| Factor 2 - Clean beauty believer | 0.74 | -1.36 | 0.06 | 0.34 |
| Factor 3 - Unsure, confused about clean beauty | -0.21 | 0.06 | -1.04 | 0.65 |
| | Clean Beauty Enthusiasts | Ignorant consumers | Regular Beauty Consumers | Close-handed Consumers |

The higher the value, the higher is the agreement with the factor. The green highlighted are the values which show strong agreement and the ones in red are strong disagreement. Based on these values, group/cluster names are allotted. The four segments identified are as follows:

1. **Clean Beauty Enthusiasts:** Highly agreeing with factor 2 and are strong clean beauty believers. There is very high disagreement with factor 1. They are most aware of clean beauty and firm believer in the concept.
2. **Ignorant Consumers:** Disagreement on almost all factors. On further looking through their attitudinal statements (as mentioned in the section below), they are unaware of clean beauty benefits.

3. **Regular Beauty Consumers:** Strong disagreement with factor 3 and agreement with factor 1. Hence, they are aware of clean beauty. However, they prefer regular products over clean beauty products.
4. **Close-handed consumers:** This cluster is agreeing to all statements; hence they are a group who cannot decide which way to go. Further studying their agreement to certain attitudinal statements, they are tight-fisted consumers who are price sensitive.

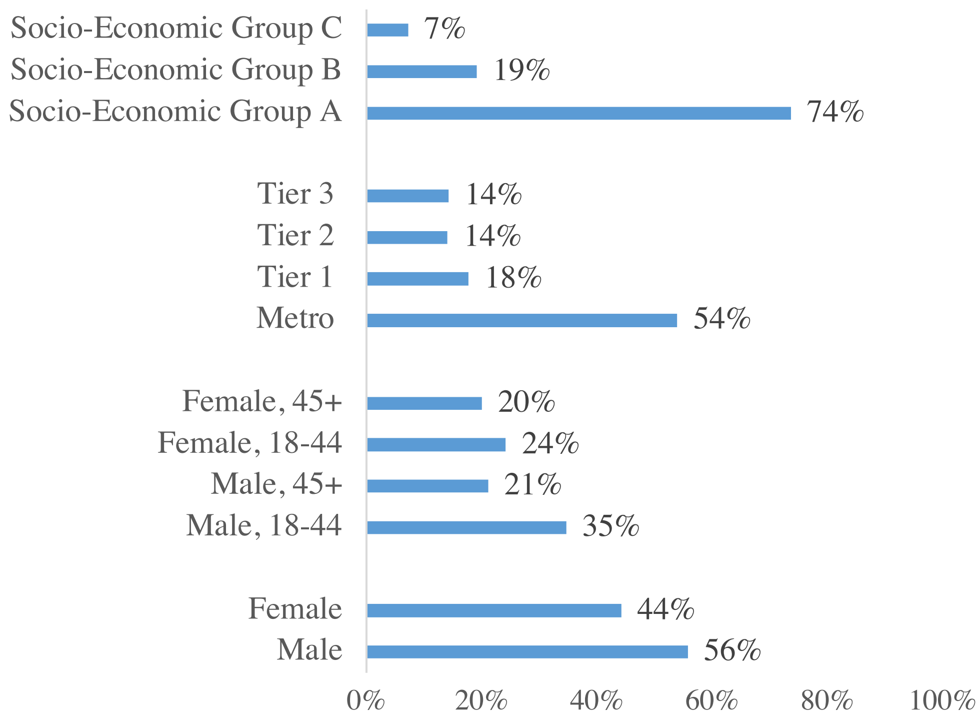
*Figure 4.16: Percentage of Consumers as per the Clean Beauty Consumer Segments*




### 4.5.1 Clean beauty Enthusiasts

This consumer segment presents itself as the ideal target audience for clean beauty brands as they believe clean beauty to be a safer and healthier solution. Primarily, they are working men and women from metro cities and those living in high socioeconomic category. Hence, it would be safe to assume that they are educated and have a high spending power.

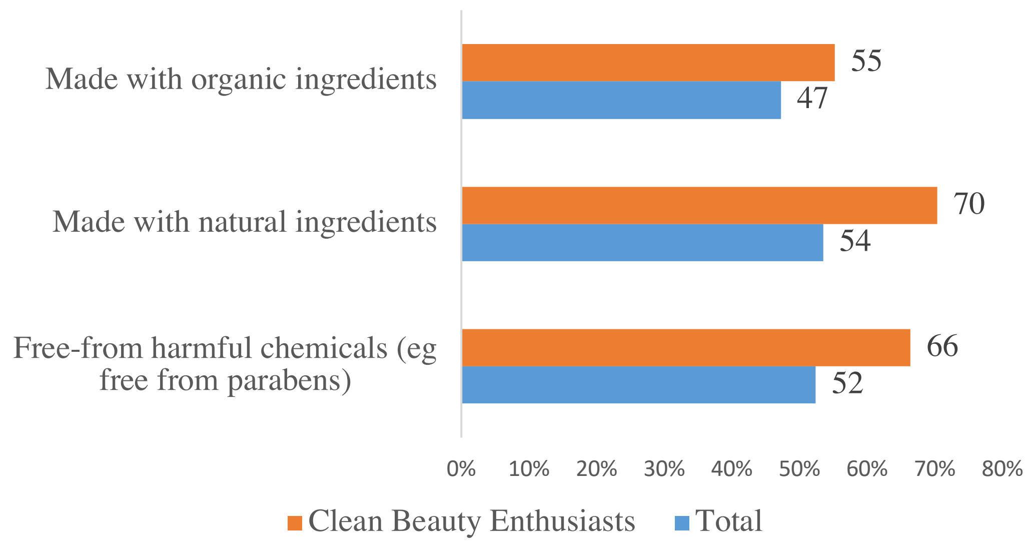
*Figure 4.17: Demographic profile of the clean beauty enthusiasts*




Although they are psycho-graphically similar, demographically it is important that brands understand who are the clean beauty cheerleaders. They are primarily men (56%), aged 18-44 (35%) living in metro cities (54%) and belonging to socio-economic group A (74%). This is not surprising considering the previous findings that clean beauty is a new concept, considered pricey and premium and marketed more in metros as a luxury offering.

Being more educated and living in metro cities, this consumer segment is more evolved and in tune with global beauty trends, such as clean beauty, which is why they know that clean beauty is not a fad but is in fact safer, healthier and made with more research and development, also highlighting their belief in science and technology.

*Figure 4.18: Percentage of Clean Beauty Enthusiasts and the Factors they Consider when Purchasing a Beauty Product compared to Total Population*

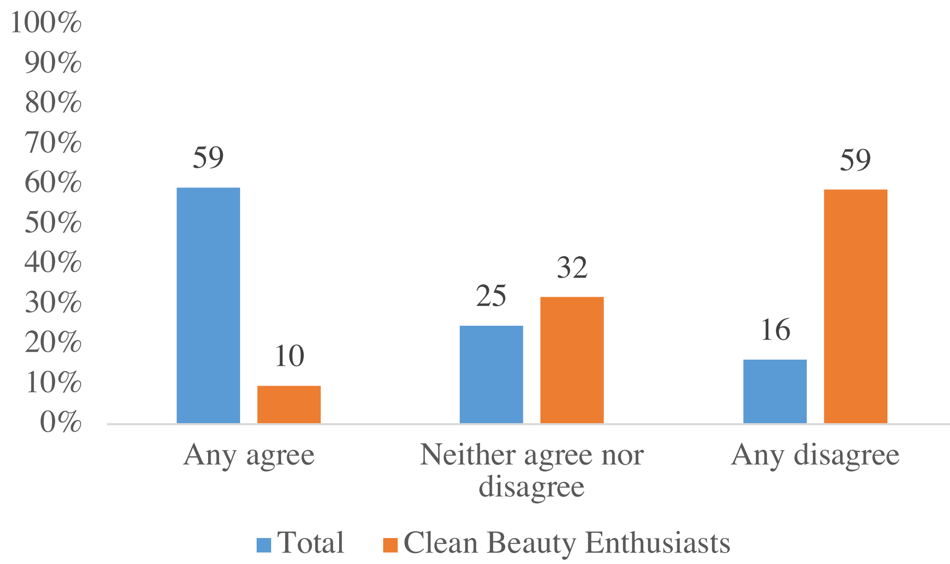



Clean Beauty Enthusiasts are more evolved consumers who are already aware of clean beauty benefits. They over-index on cleaner ingredient claims when asked what they look for when purchase beauty products.

Brands can look at moving these consumers up the clean beauty scale with organic ingredients, as 55% of them say being 'made with organic ingredients' is an important factor when choosing beauty and personal care products, significantly more than the total population.

They also are over-indexed on natural ingredients (70%) and claims pertaining to free-from harmful chemicals (55%) compared to the total population. For this consumer segment, safety is key, which is why they are driven to use environmentally friendly beauty and personal care products to evade elements that may cause contrary health effects. Therefore, we can estimate that their alignment with clean beauty is primarily to protect themselves from harmful chemicals.

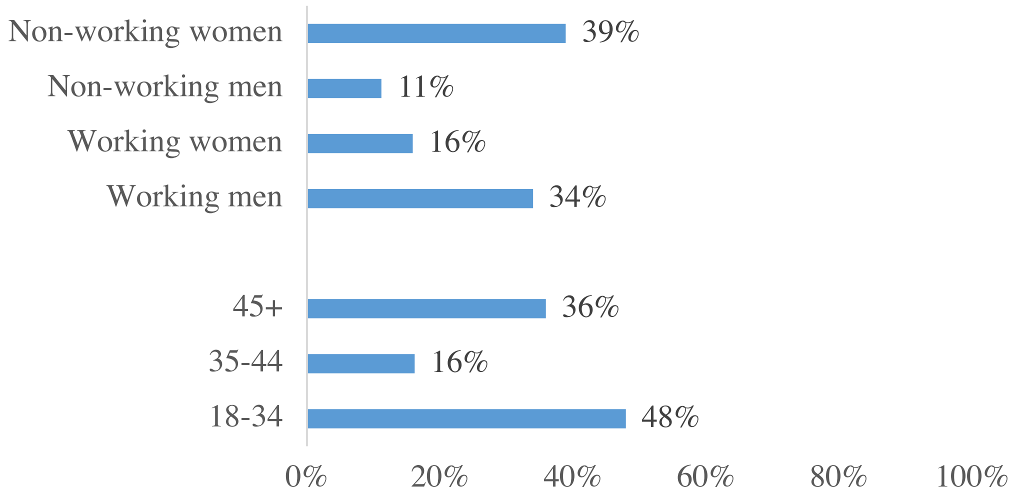
*Figure 4.19: Percentage of Clean Beauty Enthusiasts Who Agree to the Statement "it is not worth paying more for clean beauty products" compared to Total Population*




Clean beauty as a concept has built its perception to be premium. However, a considerable segment of clean beauty enthusiasts is agreeable to pay a premium for a clean beauty product. 59% of this consumer segment disagrees with the statement that it is not worth paying extra for clean beauty products (compared to 16% of the total population), and are thus inclined to pay more for clean beauty if it warrants the cost. 32% of clean beauty enthusiasts are on the fence and 10% disagree with the statement.

**4.5.2 Ignorant Consumers**

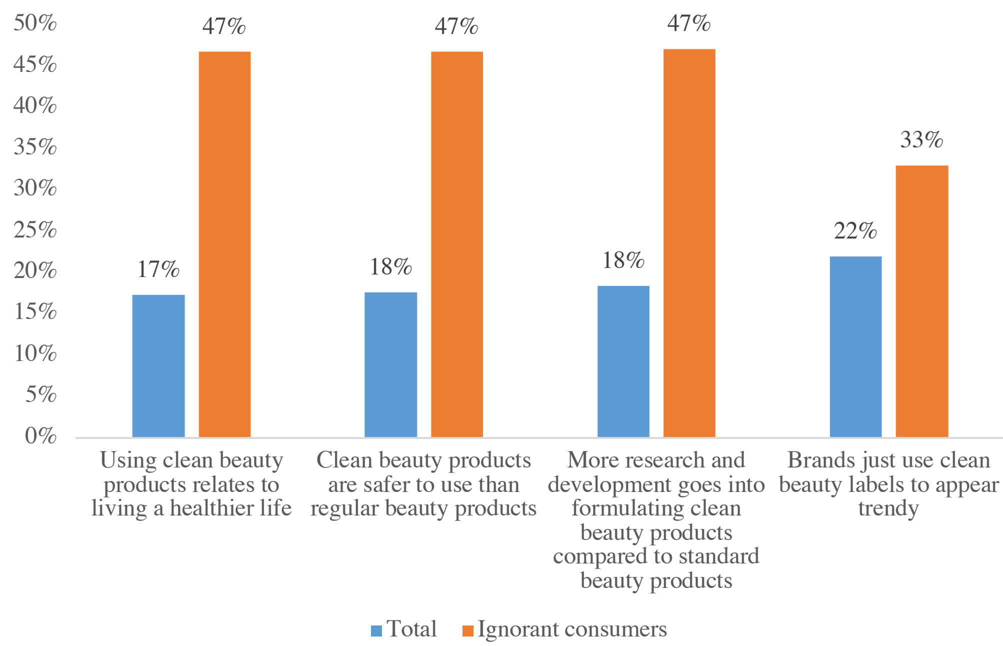
*Figure 4.20: Demographic profile of the Ignorant consumers*




This segment consists of 48% 18-34-year-old consumers and 36% of 45+ year old consumers. They are primarily non-working women and working men. They are primarily non-working women aged 18-34 from Tier 1 cities – therefore, we can assume that they are either young students or young homemakers who have a limited budget to spend on beauty.

As this consumer segment is younger and not working, we can assume that they are not as evolved as Clean Beauty Enthusiasts. Thus, due to their lack of understanding of the term clean beauty, they are still on the fence about it. Being younger women, this cohort is an important consumer segment, and hence, it is imperative that they are given the required know-how that can help them form an opinion around clean beauty.

*Figure 4.21: Percentage of Ignorant Consumers who are Neutral to Select Statements compared to Total Population*




These consumers show neutrality regarding clean beauty. They are on the fence and it is probably because they do not have enough information – they neither agree nor disagree on whether clean beauty products are safer, more effective or include more research and development, significantly more so than the total population.

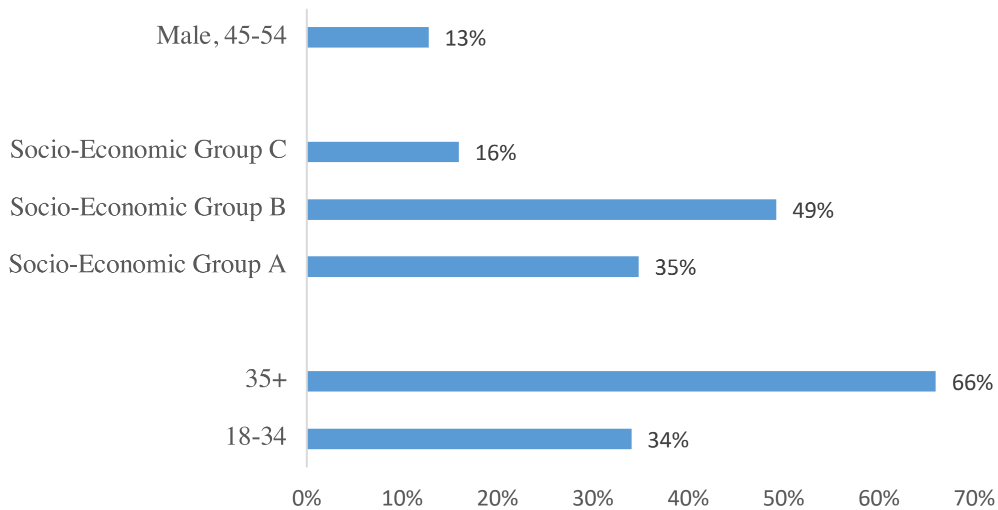
While this segment does not agree about clean beauty's benefits, they also do not think that brands are using it to appear trendy (33% ignorant consumers are neutral compared to 22% of total population)– indicating their rejection is due to a lack of understanding. 47% of ignorant consumers are neutral about more research going into clean beauty products (vs 18% of total).  47% of ignorant consumers are neutral about clean beauty products being safer than regular products (vs 18% of total). 47% of ignorant consumers are neutral about clean beauty products being a healthier way to life (vs 17% of total).

The above findings suggest that this segment perhaps needs more hand-holding and requires more knowledge on beauty, which in-store staff can provide far more than one - way channels of information. In order for brands to reach this segment, they will need to put more effort into training instore staff, so they can in turn provide consumers with the right information on clean beauty products.

### 4.5.3 Regular Beauty Consumers

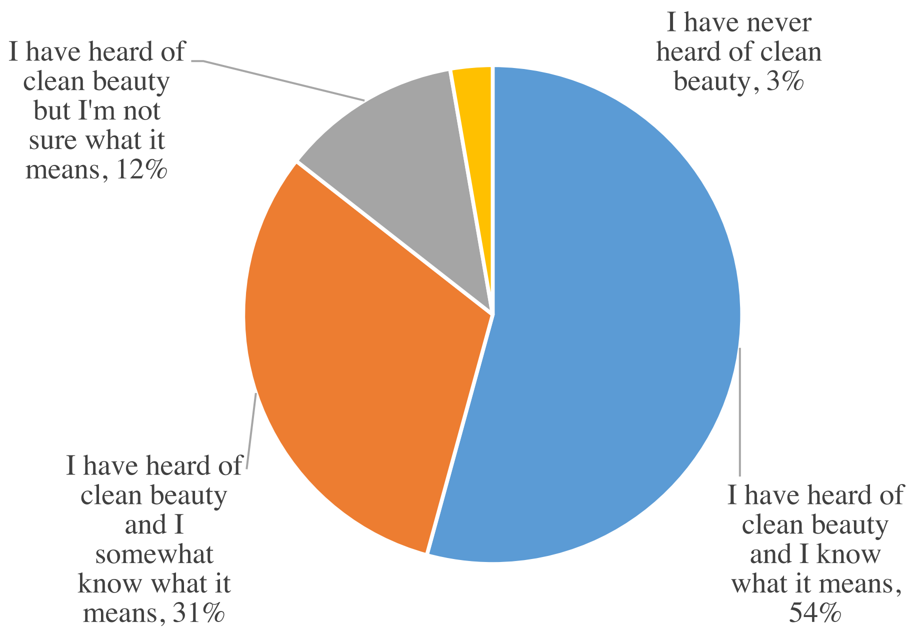
Coming from a middle socioeconomic group, Regular Beauty Consumers probably don't know enough about clean beauty, which is why they think it is a fad and continue to place their trust in regular beauty products, as they believe them to be safer and more effective.

*Figure 4.22: Demographic profile of the Regular Beauty Consumer*




This consumer segment consists of consumers primarily aged 35+ years (66%) or middle socioeconomic group (49%). Majority of men aged 45-54-year-old belong to this cluster.

*Figure 4.23: Percentage of Regular Beauty Consumers who are Aware of Clean Beauty*




This consumer segment knows what clean beauty is.  54% of regular beauty consumers have come across what is clean beauty and know what it means and 31% have heard of clean beauty and somewhat recognize what it means. Yet they have blind faith in regular beauty products.

Hence it is important to note and understand why do they trust regular beauty products and what can brands do to convert them.

These consumers veer towards regular beauty products as they believe they are more effective and safer, and they also think clean beauty is a fad.

*Figure 4.24: Percentage of Regular Beauty Consumers Who Agree to Select Statements compared to Total Population*


69% of regular beauty consumers consider clean beauty products to be a fad, compared to 59% of total population.

75% of them also feel that clean beauty products, because they are positioned as being safer and milder, are not as effective as regular products (compared to 59% of total population).

Clean beauty brands will need to make more efforts in proving their superiority to win over these consumers.

*Figure 4.25: Percentage of Regular Beauty Consumers and their Sources of Information*

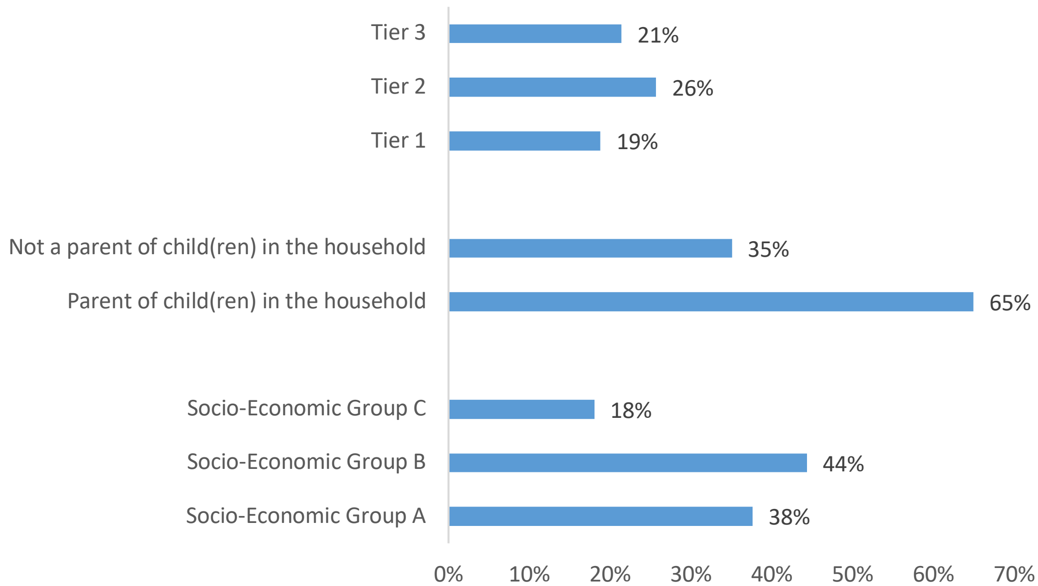

50% of Regular Beauty Consumers get their information on clean beauty from the recommendations of dermatologists and doctors, followed by 49% from friends and family, 48% from salon beauticians and 41% from bloggers.

Clean beauty brands that intend to win over this consumer segment therefore should invest in expert opinions of doctors and dermatologists to add more credibility to their standing.

**4.5.4 Close-handed consumers**

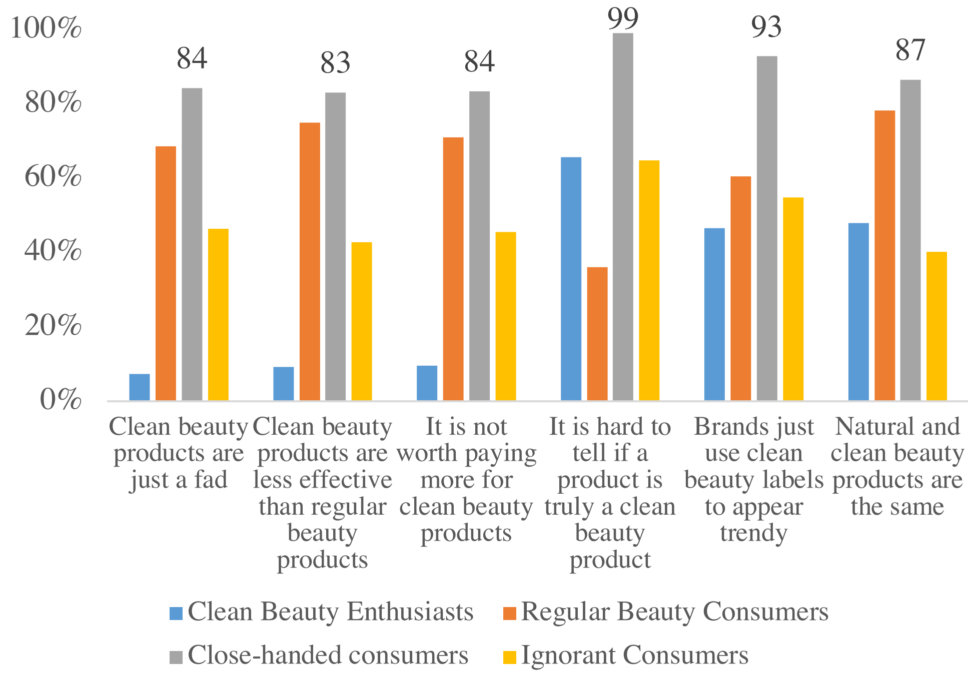
This consumer segment has limited means and education, which is why it is safe to assume that their understanding of clean beauty is extremely minimal. The lack of any understanding of clean beauty also steers them towards not seeing the value of investing in it.

*Figure 4.26: Demographic profile of the Close-Handed consumer*




These consumers primarily belong to lower socioeconomic groups (44% Group B) living in Tier 2 cities (26%). Therefore, we can assume that they have an extremely small beauty budget. They are mostly parents (65%) and their budgets and expenditures are most focused on other necessity items rather than spending on clean beauty products.

*Figure 4.27: Percentage of Consumers who Agree to Select Statements about Clean Beauty by Consumer Clusters*




The Close Handed Consumers have the least knowledge of clean beauty – 87% consider natural and clean beauty as synonymous. They hence do not even consider it worth investing in. 84% of close handed consumers consider clean beauty products are just a fad – this is highest among all clusters. They have trust issues with clean beauty as 83% cogitate clean beauty products to be less effectual than regular beauty products.

They have serious trust issues with clean beauty products, almost all of them (99%) agree that it is difficult to articulate if a product is really a clean beauty product and 93% of them believe that brands just use clean beauty as a claim to appear trendy. Close-handed Consumers come from limited means and are therefore not currently the ideal target audience for clean beauty in the country. 84% of them concur that it is not worth giving additional for clean beauty products. This is particularly valid as clean beauty products are also priced higher than ordinary, mass beauty products.

**4.6 Summary of Findings**

The Indian consumer presents itself as the ideal target audience for clean beauty brands, as they believe clean beauty products are safer, lead to a healthier life and have formulations that continue to improve thanks to efforts in research and development.

However, as clean beauty has not yet associated itself strongly with a clear proposition, Indian consumers currently consider clean beauty as only a fad or a trendy label being used by brands. For those that understand what it means, the inclination is more towards associating natural with clean beauty.

While clean beauty brands cannot completely disassociate themselves from the natural narrative, they can use it to their advantage to win over Regular Beauty Consumers, who are accustomed to using regular beauty products with natural ingredients.

While the close-fisted consumer segment currently might not be the ideal target audience for clean beauty brands, what we have also seen is that usually trends flow from the higher strata to the lower ones of society. So once clean beauty gets established among consumers from a high socioeconomic group and in metro cities, we can assume that it will then permeate down to the lower socioeconomic groups and lower tier cities of the country.

### 4.7 Conclusion

For awareness to improve, consumers can build clean beauty beyond the natural narrative. However, with the natural narrative deeply ingrained in India, it is no surprise that clean beauty has strongly latched onto it. Nevertheless, natural is also omnipresent in beauty products and will not be enough to differentiate clean beauty. Natural claims will particularly appeal to clean-beauty enthusiasts.

A key drawback for the Indian beauty category is the lack of laws and regulations governing it. Brands can provide a deeper understanding around clean beauty. This poses a challenge to clean beauty, as its definition is still vague, and many Indian consumers still consider it to be just a fad. More education is required to help consumers clearly understand the purpose of clean beauty.

Assure consumers, that the quality they receive is worth the money they pay. Demonstrate how sustainable products help them save money in the extended period (e.g. safe to use for many years) and hence prove cost-effectiveness.

Primary target group for clean beauty brands would be the clean beauty enthusiasts – men aged 18-34 years, living in metros from Socio-economic group A who think it is alright to pay more for a clean beauty product. The next cluster to target would be those that are using regular beauty products now, who can be converted with more knowledge and information on clean beauty products.

CHAPTER V:

DISCUSSION

### 5.1 Discussion of Results

People are becoming more invested in their health. The self-aware consumer is increasingly making informed choices with respect to their beauty purchases, often turning to online research to make sure of ingredient safety. As a result, they are looking for products with less toxicity for their personal use.

The category is sliced across the 4Ps.

1. Product: The awareness of the clean beauty category
2. Perception: Consumer's demands from the category
3. Price: Willingness to pay a premium
4. Promotion: Sources of information that consumers look for.

With literatures dating back to 1975 quoted in the thesis, there is highlights of how the category has evolved, how the researches have taken shape, and especially where India stands in this whole category. This thesis amalgamates the data and literatures to provide a wider perspective to the category. The data points are grouped into the 4Ps and into each theme to bring to the reader a full picture of each pillar of clean beauty.

Bringing together knowledge from past published papers and then linking them to consumer findings, gives a fuller picture and opens up discussions on what next is the segment leading into.

### 5.2 Discussion - Research Question One

#### 5.2.1. Discussion Related to Existing Literature

The respondents were on the edge when it came to awareness of clean beauty. Clean brands are linked with expressions such as natural, safe and transparent. In general, due to lack of awareness, consumers have difficulty in identifying ecological products on the aisles of the market. Debora et al., (2022) has suggested that since there is not an authorized description of what clean beauty is, numerous shoppers have diverse understandings of it and what features clean products should contain. Absence of evidence to the consumers about clean products regularly ends up in an attitude-behavior space. Hence, their behavioral concern and actual buying do not match impacting market share for clean brands (Ohtomo and Hirose, 2007).

According to Rawat and Pande (2024) ultimately, it is the cooperative efforts of brands, shoppers, industry and government that the green market will grow in India. Knowledgeable shoppers are surely conscious about the environment and are aware about nature's related issues and their concern about the environment tends to impact their clean product purchase behavior to some degree, thereby controlling the buying of ecological products (Ishaswini and Datta, 2011).

Former research led globally advocates that the environmental sort of consumers is constantly evolving but there is still a difference in the way they shop and live (Jungermann & Jungermann, 2010). Therefore, there is a need to define clean beauty for the Indian consumer. To counteract this belief and establish trust in clean beauty, brands can leverage the clean beauty learning channels that each target relies on.

### 5.2.2 The 'natural' proposition is synonymous with "clean" beauty

Clean beauty is a novel theory to India and is projected to develop further in the near-term. However, unsolved issues remain. The first issue is that shoppers do not have well-defined knowledge of what clean beauty is.

Consumers consider natural ingredients to be the most important factor in a beauty and personal care product, showing how deeply ingrained the natural narrative is for them. With clean beauty lacking a clear definition, it has tied itself closely with the natural conversation, which is why more than half of consumers (68%) say environmental and clean beauty products are similar.

Even the clean beauty enthusiasts, who should be the ideal target group, are over-indexing on natural and organic claims. There is a lot more to clean beauty than just natural. And here is where lies the scope of expansion and growth.

Clean beauty currently has not strongly associated itself with any clear purpose, and therefore, shoppers do not have a clear idea of it – 72% say it is difficult to say if a product is sincerely a clean beauty product. The necessity for a sharper explanation will redefine clean beauty as not just a trendy label.

This lack of engagement is primarily due to consumers' lack of knowledge when it comes to more abstract sustainability concepts as well as the challenges they associate with living a sustainable lifestyle demonstrating the widespread need for more sustainability knowledge.

Furthermore, some Indian consumers look at clean beauty as merely being a fad (59%) or a chic label used by brands (69%), hence indicating awareness levels are low. Ignorant consumer cluster has low knowledge about clean beauty and more so, cannot really differentiate between clean and regular beauty products. Thus, this segment needs some more work from brands on how the claims are actually true.

### 5.3 Discussion - Research Question Two

#### 5.3.1 Discussion Related to Existing Literature

The most important attribute when it comes to buying any cosmetic is safety. This discovery is on track with past literatures. Shoppers pursue "clean" and "natural" products. But there is no customary, logical basis, or authoritarian supervision in the selling or ingredient use (Tran et al., 2022).

Birgelen et al. (2008) suggested that environmentally safe packaging is a driver to purchase, while Khare (2015) observed the impact of former environmental approaches, communal and personal ecological averages, social stimulus and green self-identity.

Strikingly, self-concern and safety had the most meaningful sway on consumer's buying purpose followed by proof of claims.

### 5.3.2 Focus on safety to propel clean beauty in India

Clean beauty products which are confirmed safe to use on hair or skin can reach 53% of Indian consumers, making this a key attribute consumers look for in clean beauty products. Being free of harmful chemicals is the second-most important factor (52%) that consumers look for in a beauty and personal care product, again signalling consumer attention to self-preservation.

Proving the authenticity of ingredients and focusing on free-from claims can help kick off the movement. Additionally, these claims can be made full proof with accreditations, symbols, scientific trials and cutting-edge science and technology to help ascertain clean beauty as a safer preference.

Regular Beauty consumer cluster are aware about clean beauty however, they still need trust building on claims, certifications and doctor recommendations. There is scope to choose a particular cluster of interest and understand them further based on their habits, purchasing patterns and lifestyles.

## 5.4 Discussion - Research Question Three

### 5.4.1 Discussion Related to Existing Literature

From the research it can be concluded that a direct correlation exists between shopper's buying decision and the MRP of a sustainable product. It is important to identify that customers do wish to buy green products as stated in the research but it may not translate into actual purchases.

Although most people have a favorable attitude towards organic cosmetics because they recognize the benefits associated with using them, there are some individuals who have a negative attitude towards them due to the fact that they can be more expensive. Rybowska (2014) found that consumers consider environmentally friendly cosmetics to be a luxury item due to the fact that they are difficult to obtain and pricey. Gawas (2022) found that price is adversely linked to green purchasing behavior.

The high price sensitivity of Indians poses a specific task for green marketeers. Several users shy away from paying more for environmental products, since they considered higher price synonymous with luxury than a need (Manaktola & Jauhari, 2007). Numerous clean products are undeniably valued greater than their orthodox equivalents due to improved production expenditures and reduced economies of scale.

**5.4.2 Prove cost-effectiveness as a measure of tangible benefits**

59% of consumers concur that it is not worth paying a premium for clean beauty products. Hence, consumers are not keen to pay a higher price for clean beauty products.

The most likely scenario is that consumers put their budgetary concerns ahead of sustainability, but that some of those decisions ultimately support sustainability anyways. The more that sustainability can align with consumer spending preferences, the more momentum there will be behind the movement.

Tangible benefits should be prioritized over sustainability. Safety is fundamental for consumers, which is why 53% of consumers would agree to pay higher for a clean beauty product if it is established harmless on skin/hair. This would particularly appeal to the close-fisted consumer, who in spite of being aware of clean beauty are not really purchasing them.

This means that there is scope for research on formulations which are safer to use. Brands must prove to consumers that the products they sell are safe, efficient and worth its price, and more importantly safe for the environment.

### 5.5 Discussion - Research Question Four

#### 5.5.1 Discussion Related to Existing Literature

Owing to lack of regulations in the industry leading to distrust among the consumers, respondents have selected reliable and trust worthy sources in the research. They are wanting to research and discover the technical design and strength of active constituents of products.

The different sources which are available to gather information on green beauty products have amplified over the previous few years and brands have developed an option to explore many more BTL (Below the line) options as well – like referrals, influencers and expert opinions.

Patel, (2020) discovers the control that social media and peer endorsements have on buyer behavior especially towards organic cosmetics and Oyewole (2001) mentioned that societal impact is a critical cause in their purchasing behavior, emphasizing the sway of digital channels on beauty developments.

Owing to the fact that clean beauty is a new concept, brands will need to find trustworthy spokespeople, such as doctors and beauticians, to confer the uses of clean safe skincare products, both for the well-being of self and the environment.

#### 5.5.2 Provide credible source of information to learn about clean beauty

A key drawback for the Indian beauty category is the lack of laws and regulations governing it. This poses a challenge to clean beauty, as its definition is still vague, and many Indian consumers still consider it to be just a fad.

More education is required to help consumers clearly understand the purpose of clean beauty. There arises the obligation of setting up business standards to monitor companies/brands and also appeal to buyers through learning, to give them a greater understanding of clean beauty.

53% of Indians would prefer brands recommended by friends/family and 49% would listen to dermatologist/doctor recommendations. Close enough is salon beautician recommendations with 45% and 42% is blogger recommendations. Hence it is safe to say that consumers look for reliable sources of information to learn about clean beauty.

In India, clean beauty has been led by DTC brands, and therefore, as a concept, it has evolved online. There is potential to put more effort into training in- store staff and researching ways to connect with consumers with expert recommendations, so they can in turn provide consumers with the right information on clean beauty.

CHAPTER VI:

SUMMARY, IMPLICATIONS, AND RECOMMENDATIONS

## 6.1 Summary

Based on the findings, it is clear that clean beauty is a new-fangled thought in India, and therefore, a key issue for the category is the lack of consumer understanding. More education and awareness is required, as Indian shoppers consider clean beauty as only a whim or a stylish label used by brands.

Being made with natural ingredients is the most important factor consumers look for in BPC products, which is why clean beauty has strongly attached itself to the natural narrative, leading Indian consumers to believe clean beauty and natural are the same (68%).

Secondly, safety is fundamental for Indian consumers, which is why being free of harmful chemicals is the second- most important factor consumers look for in BPC products, and being proven safe on the skin/hair is a key feature users would be agreeable to pay higher price in clean beauty products.

In terms of paying more for clean beauty products, majority of the cluster of Clean Beauty Enthusiasts disagree with the statement that it is not worth paying a premium for clean beauty products. Additionally, 50% of them attest that they would pay more for clean beauty products that are made with advanced science and technology. Hence, advanced science and technology can be leveraged to provide greater safety for Clean Beauty Enthusiasts.

Education, information and transparency – provided in simple, easy-to-understand ways – will become increasingly important as consumers will want to be authorized to create new cognizant judgements about what they purchase.

## 6.2 Implications

### 6.2.1 Merge 'natural' with sustainable beauty

The pandemic has made consumers refocus on health and they are increasingly looking at natural offerings as a means to protect themselves. Further, consumers are also concerned with living natural, ethical and eco-friendly lifestyles. By using the ever-popular natural proposition and combining sustainable claims, brands can set themselves apart from the growing number of natural beauty brands in India.

Consumers consider natural ingredients to be the most important factor in a beauty and personal care product, showing how deeply ingrained the natural narrative is for them. With clean beauty lacking a clear definition, it has tied itself closely with the natural conversation, which is why more than half of consumers (68%) say natural and clean beauty products are synonyms.

Once buyers are proficient with clean beauty, brands can go beyond the center of natural components and try to trade buyers up to wide-ranging avenues of clean beauty such as organic elements, ingredient history and sustainability creativities.

Consumers' aspiration for natural and harmless products, supplied by conscientious companies, will endure, along with apprehensions about environmental influence and improved lifestyles.

Natural beauty brands that aim to move towards sustainability can embrace the local/ethically sourced movement through ethical production methods like growing their own ingredients, using seasonal products, waterless formulas and supporting local farmers to reduce their carbon footprint, while enhancing their products' efficacy and social/health benefits.

### 6.2.2. Transparency is basic for clean beauty to thrive

Clean beauty products which are verified harmless on skin or hair can reach 53% of Indian consumers, making this a key attribute consumer look for in clean beauty products. Being free of harmful chemicals is the second-most important factor (52%) that consumers look for in a beauty and personal care product, again signaling consumer attention to self-preservation. Defining clean beauty and assigning a well-defined purposefulness such as being harmless to practice can aid in targeting fresh patrons whose curiosity in well-being and safety is anticipated to stay after the pandemic.

Build awareness around certifications and the importance of them so consumers are able to identify them better. Conduct clinical trials not only to help build trust with consumers but also to differentiate products from regular beauty brands. Use cutting-edge science and expertise to deliver more clearness and provide evidence supporting the effectiveness of clean beauty brands.

**6.2.3. Increase the affordability and convenience of sustainable products.**

A lack of clean beauty knowledge coupled with the high prices and absence of faith are the key barriers to Indians adopting clean beauty products. Consumers are increasingly showing support for ethical and sustainable brands, yet their support is not necessarily converting to purchase.

Brands will need to constantly use their pricing and product strategies to assure consumers that the quality they receive is worth the money they pay. The most likely scenario is that consumers put their budgetary concerns ahead of sustainability, but that some of those decisions ultimately support sustainability anyways. The more that sustainability can align with consumer spending preferences, the more momentum there will be behind the movement.

Eventually, the claims like better performance and longer lasting will be always be important to lure consumers to purchase. However, even for consumers veering towards greener alternatives, only being eco-friendly will not be enough to sustain a brand on the shelf. The efficacy claims will always outweigh green claims.

It is a belief generally that consumers will have to choose either functionality or pay a premium price when choosing a product with environmental benefits. In order to succeed in this market, these misconceptions of shoppers will have to be altered to boost green consumption. Additionally, reduced pricing strategies could help consumers to realign their price perceptions. Handing out mini-testers can induce product trial and thereby promote purchase. Creating a positive brand experience will make sure consumers return for repeat purchase.

**6.2.4. Employ a specialist voice to provide credibility to clean beauty claims**

There is a lot of confusion and ambiguity surrounding sustainability. Thus, brands which are able to help consumers make the right choice will have a first mover advantage. Brands need to show sustainable proof and make it traceable and accessible for consumers to know about brands' sustainable practices and their achievements (e.g.: posting visuals/numbers of initiatives' success on social media).

Close handed consumers are mostly parents and their budgets and expenditures are most focused on other necessity items rather than spending on clean beauty products. However, with proven safety and non-toxicity there is scope for them to invest in clean beauty products.

In this era of social media, the sustainable products/campaigns must project a trendy and stylish image. Another trend to follow and latch onto is to use influencers and collaborate with other brands to make a bigger impact.

Brands can use fun, engaging and convenient methods to educate consumers about the environment, such as through games or new technology that provides easy access to knowledge about sustainability (e.g. connected package that link to interactive information display).

50% of Regular Beauty Consumers say they have received information on clean beauty from the recommendations of dermatologists or doctors. Beauty experts like dermatologists, cosmetic chemists and industry professionals may be viewed as more trustworthy and knowledgeable than other types of influencers. Brands can also enlist the support of 'clean experts', such as environmental advocates or animal rights advocates, to prove the clean way of life.

### 6.3 Recommendations for Future Research

The clean beauty industry is constantly evolving and hence a research done today will need to be updated constantly. Future researchers can find scope to elaborate the research to a specific category and compare categories on what consumers look for in skin care versus hair care clean beauty products.

Since Mintel conducts nation-wide survey, this paper focused on India as a whole. There is scope to conduct specialized research in a particular demographic in the future.

Since clean beauty is still nascent in India, a top-line research conducted helps brands to understand the landscape of the category in India and the consumers' needs and understanding of the category.

Moving forward, a focused approach to research will benefit brands to channel their resources.

### 6.4 Conclusion

As stated by Tseng and Hung (2013) spaces are found between customers' anticipations and their observations in green products with respect to all qualities. It is therefore suggested that the clean beauty product providers improve their communication strategies to fulfil customers' hopes to surge the market value of clean safe products.

Despite the enthusiasm to be eco-friendly, the bridge from mental commitment to actionable commitment is a steep one for consumers. It's likely that an increase in sustainable behaviours will continue to be gradual and subtle.

Keeping in mind the strong consumer preference for natural, products made with natural ingredients will remain the most important factor consumers look for in products. This is why clean beauty should continue to strongly attach itself to the natural narrative. Secondly, safety is key for Indian consumers, which is why being free of harmful chemicals is next factor which should be highlighted. This can be coupled with being proven safe on the skin/hair.

Consumers struggle to identify clean beauty. Clean beauty is a fresh theory in India, and hence, a key issue for the category is the lack of consumer understanding. More education and awareness is required, as Indian buyers consider clean beauty as just a vogue or a hip tag being advertised by brands.

India has a ready and willing base of consumers for clean beauty. Keen consumer interest in formulations and labels and access to data through online channels, along with a likeness for the natural narrative, the Indian consumers are primed for clean beauty.

## APPENDIX A

## QUESTIONNAIRE

*This questionnaire was designed and executed by Mintel Ltd. "Clean Beauty" title was a part of a larger questionnaire, hence only select questions pertaining to the thesis are included here.*

[Ask all aged 18+; Base: Internet users aged 18+]

D001. Please choose a language.

1. Bengali
2. English
3. Gujarati
4. Hindi
5. Marathi
6. Oriya
7. Tamil
8. Telugu

[Ask all aged 18+ who select code 2 at D001; Base: Internet users aged 18+ who select English]

D002. In which language are you most comfortable reading?

1. Bengali
2. Gujarati
3. Hindi
4. Marathi
5. Oriya
6. Tamil

7. Telugu
8. None of these

D003. [Consumption / usage and frequency] Which of these have you bought in the last month either online or in-store? [randomize rows 1-10]

1. Sparkling bottled water
2. Tea drinks (e.g. iced tea, kombucha)
3. Vegetable chips (e.g. beetroot chips)
4. Whole wheat cookies (e.g. High protein cookies)
5. Ready to eat sauces (e.g. pesto sauce)
6. Face cleanser/face wash
7. Scented candles
8. Colored contact lenses
9. In-shower body treatment (e.g. Nivea skin conditioner)
10. Air Freshener (e.g. Godrej Aer Musk After Smoke Spray)
11. None of the above

[Ask all aged 18+; Base: internet users aged 18+]

D1. [Gender] Are you…? Please select one response.

1. Male
2. Female

[Ask all aged 18+; Base: internet users aged 18+]

D2a [Age] What is your age?

1. show numeric box – ages 0 -110 allowed.

[Ask all aged 18+; Base: internet users aged 18+]

D3a [Region] What region do you live in? Please select one response.

1. North
2. South
3. East
4. West

[Ask all aged 18+ and filter list for cities based on D3a;

Base: internet users aged 18+]

D4a [Tier 1 City] What city do you live in? Please select one response.

| North (If D3a = 1) | South (If D3a = 2) | East (If D3a = 3) | West (If D3a = 4) |
|---|---|---|---|
| Delhi | Chennai | Kolkata | Mumbai |
| Lucknow | Coimbatore | Patna | Ahmedabad |
| Jalandhar/ Chandigarh/ Bareilly | Tirupur/ Hubli-Dharwad/ Kochi | Bhubaneswar/Guwahati / Jamshedpur | Anand/ Bhiwandi/ Kolhapur |
| Ambala/ Rohtak/ Ludhiana | Nizamabad/Belgaum/ Mangalore | Aurangabad (Bihar)/ Gaya/ Bhagalpur | Amravati/ Malegaon/ Nashik |

[Ask all aged 18+; Base: internet users aged 18+]

D5a. [Monthly Household Income] What is your household's total monthly income? Please include all salaries, pensions, investment income, interest earned, public assistance, and other sources of income in your answer. Please select one response.

1. Below Rs 5,000
2. Rs 5,000 - 9,999

3. Rs 10,000 - 14,999
4. Rs 15,000 - 19,999
5. Rs 20,000 - 24,999
6. Rs 25,000 - 29,999
7. Rs 30,000 - 34,999
8. Rs 35,000 - 39,999
9. Rs 40,000 - 44,999
10. Rs 45,000 – 74,999
11. Rs 75,000 – 99,999
12. 1 Lac+ (Rs 1,00,00+)
13. Prefer not to say

D6a [Standard 11 Items owned]

Which of these items do you have at home? It could be owned by you, your family, or provided by the employer, or it could be available in the house you live in; but it should be for the use of just you or your family. Please select all that apply.

1. Electricity connection
2. Ceiling fan
3. LPG stove
4. Two-wheeler (e.g. Scooter, etc.)
5. Colour TV
6. Refrigerator
7. Washing machine
8. Personal computer/ Laptop
9. Car/Jeep/Van

10. Air conditioner

11. Microwave (do not count as a standard asset)

[Ask all aged 18+; Base: internet users aged 18+]

D6b Number of durables Does your family own any agricultural land (i.e. land that is currently under cultivation or plantation)?

- Yes
- No

[Ask all aged 18+; Base: internet users aged 18+]

D7 [Chief Wage Earner's Education] Please tell us about the person who makes the biggest contribution to the running of the household. To what level has he/she studied? Please select one response.

1. Illiterate
2. Literate but no formal schooling/School up to 4 years
3. School: 5 to 9 years
4. SSC/HSC
5. Some College (including a Diploma) but not Graduate
6. Graduate/Post Graduate: General
7. Graduate/Post Graduate: Professional

[Ask all aged 18+; Base: internet users aged 18+]

D9a. [Working situation] Which best describes your current working situation? Please select one response.

1. Working full-time (at least 30 hours/week)

2. Working part-time (less than 30 hours/week)
3. Self-employed/business owner/temporary worker
4. Student
5. Retired/pensioner
6. Homemaker
7. Unemployed
8. Not working for some other reason

[Ask all aged 18+; Base: internet users aged 18+]

D10a. [Household composition] Who lives with you in your household? Please select all that apply.

1. I live alone [EXCLUSIVE]
2. My child(ren)/step children
3. My parents/parents-in-law
4. Husband/wife/significant other
5. Grandchildren
6. Grandparents
7. Siblings
8. Other relatives/in-laws
9. Others

[Ask all aged 18+; Base: internet users aged 18+]

D10b. [Household composition] Do you have a pet in your household? Please select all that apply.

1. Yes

2. No

[Ask all aged 18+; Base: internet users aged 18+]

D10h [Household employment] Does your household employ someone to do any of the following roles? Please select all that apply. If one person does multiple roles please select all the roles that that person performs.

1. Maid/cleaner (live in)
2. Maid/cleaner (part time) housekeeper
3. Cook
4. Nanny/child-minder
5. Gardener
6. Driver
7. Other domestic help
8. None of the above

[Ask all aged 18+; Base: internet users aged 18+]

D11a. [Marital status] Which of this best describes your current marital status? Please select one response.

1. Married
2. Single
3. Widow/widowed
4. Separated/divorced
5. Living as married

[Ask all coding 2 at D10a; Base: internet users aged 18+ with children in the household]

D12a. [Ages of children in household] How old are the children/step-children living in your household? Please select all that apply.

- Aged 5 and under
- Aged 6-12
- Aged 13-15
- Aged 16-17
- Aged 18+

[Ask all coding 2 at D10a; Base: internet users aged 18+ with children in the household]

D13a. [Childcare responsibility Who is mainly responsible for looking after your children? Please select one response.

- Mainly myself
- Both myself and my husband/wife/partner
- Mainly my husband/wife/partner
- Parents/grandparents
- Siblings
- Extended family (i.e. uncles, aunties, cousins)
- Nanny/childminder
- Other

[Ask all aged 18+; Base: internet users aged 18+]

D14. Including yourself, how many people are there in your household? Please select one response.

- 1 [auto-punch if coding 1 at D10a]
- 2
- 3
- 4
- or more

[Ask all aged 18+; Base: internet users aged 18+]

D15. In your home who is responsible for doing household chores (e.g. cooking, cleaning, washing etc.)? Please select one response.

- I am solely responsible
- I am mostly responsible
- I share chores equally with someone else/others
- I do some, but someone else does most
- I don't do any household chores

[Ask all aged 18+; Base: internet users aged 18+]

D16. In your home, who is responsible for doing the food/drink shopping? Please select one response.

- I am solely responsible
- I am mostly responsible
- I share responsibility equally with someone else/others
- I do some, but someone else does most
- I don't do any food/drink shopping for the household

[Ask all aged 18+; Base: internet users aged 18+]

D17. [Financial situation] How would you generally describe your financial situation at the moment?

- Healthy – I have money left at the end of the month for a few luxuries or to add to my savings
- OK - I get by, but there’s not a lot left by the time the basics are taken care of
- Tight – I’m making ends meet, but only just
- NET: Struggling/In trouble = codes 4-5
- Struggling – I’m in danger of falling behind with bills or loan repayments
- In trouble – I’ve missed loan repayments or household bills

Ask all - show at the end of the demographics section.

QC1a. How many balls do you see in the image below? [single code]

- One
- Two
- Three
- Four
- Five

- Six

Terminate if incorrect answer selected

**<u>Clean Beauty</u>**

**Ask all aged 18+, i.e. Base: Indian adults aged 18+**

**Introduction: We will now ask you about beauty and personal care products. This includes facial skincare products such as face moisturizers, body care products like body lotions, hair care products like shampoos and soap, bath and shower products as well as color cosmetics.**

Ask all, i.e. Base: internet users aged 18+

Q1a. [Factors associated with clean beauty] In your opinion, what are the 5 most important factors you would consider when choosing a beauty and personal care product? Please rank up to 5 where 1 is the most important factor. [Ranking 1- 5, randomize codes 1-10, keep codes 2-3 together]

1. Free-from harmful chemicals (e.g. free from parabens)
2. Made with natural ingredients
3. Made with organic ingredients
4. Cruelty-free (e.g. no animal testing)
5. Carries certifications
6. Is vegan (i.e. free from animal ingredients)
7. Is sustainably packaged (e.g. recyclable, degradable)
8. Does not harm the environment during manufacturing (e.g. no air pollution)

9. Has ethical claims (e.g. organic India supports girl's education)
10. Supports local organic farmers (e.g. Khadi supports farmers)
11. None of these

Ask all aged 18+, i.e. Base: Indian adults aged 18+

Q1b [Awareness of clean beauty] Which statement best describes your awareness of the term "clean beauty"? [DO NOT RANDOMIZE]

1. I have heard of clean beauty and I know what it means
2. I have heard of clean beauty and I somewhat know what it means
3. I have heard of clean beauty but I'm not sure what it means
4. I have never heard of clean beauty

*We define 'Clean beauty products' as those made without ingredients that are shown to or suspected to be harmful to human health or the environment. Hence, they are free-from harmful chemicals and usually made with natural/organic ingredients that are sustainably sourced and cruelty-free.*

Ask all coding 1-3 at Q1b, i.e. Base: internet users aged 18+ who have heard of clean beauty

Q2. [Source of information] From which of the below sources do you get information about clean beauty products? Please select all that apply. [Multicode, randomize codes 1-11, Keep 6- 11 together]

1. Advertisements on TV
2. Reviews on e-commerce
3. Promotional offers
4. Brand websites/social media pages

5. Certifications on products
6. Recommendations from friends/family
7. Recommendations from celebrities
8. Recommendations from dermatologists/doctors
9. Recommendations from salon beauticians
10. Recommendations from In-store staff
11. Recommendations from bloggers
12. None of these [Single code, anchor]

Q3. [Attitudes] To what extent do you agree or disagree with the following statements about clean beauty products? [Single code per row, randomize rows 1-10] [Internal note: Cluster Analysis]

Ask all, i.e. Base: internet users aged 18+

| | [5] Strongly agree | [4] Agree | [3] Neither agree nor disagree | [2] Disagree | [1] Strongly disagree |
|---|---|---|---|---|---|
| THEME 1 - Clean Beauty Follower - Do not show | | | | | |
| 1. Using clean beauty products relates to living a healthier life | | | | | |
| 2. Clean beauty products are safer to use than regular beauty products | | | | | |
| 3. More research and development goes into formulating clean beauty products compared to standard beauty products | | | | | |
| THEME 2 - Clean Beauty Non- believer - Do not show | | | | | |
| 4. Clean beauty products are just a fad | | | | | |
| 5. Clean beauty products are less effective than regular beauty products | | | | | |

| | | | | | |
|---|---|---|---|---|---|
| 6. It is not worth paying more for clean beauty products | | | | | |
| THEME 3 - Ignorant to Clean Beauty - Do not show | | | | | |
| 7. It is hard to tell if a product is truly a clean beauty product | | | | | |
| 8. Brands just use clean beauty labels to appear trendy | | | | | |
| 9. Clean beauty products are not easily available | | | | | |
| 10. Natural and clean beauty products are the same | | | | | |

Q20. [Purchase Features] Which of the following features would you pay more for in a ‘clean’ beauty product? Please select all that apply. [Multicode, randomize rows 1-9]

1. Carries certifications from international bodies
2. Labelled “clean” on packaging
3. Contains exotic natural ingredients (e.g. avocado)
4. Made with advanced science and technology
5. Made only with natural ingredients
6. Proven safe on skin/hair
7. Is fragrance-free
8. Supports social causes (e.g. gender equality)
9. Made with plastic-free packaging
10. Other [Anchor]
11. I would not pay more for any clean beauty product [Single code, anchor]

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