

**THE INFLUENCE OF INGREDIENTS TOWARDS MALAYSIAN CONSUMER'S  
PREFERENCES ON FACIAL CARE MOISTURISER :  
CASE STUDY ON MALACCA CONSUMER**

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**2007**

"I declare that this thesis entitled *The Influence of Ingredients towards Malaysian Consumer's Preferences on Facial Care Moisturiser: A Case of Malacca Consumer* is a result of my own works except as cited in the references"

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Date : September 2006

## **DEDICATION**

**For Andek Md.Hazwan and Andek Noor Haziqah.**

**“A POSITIVE ATTITUDE, HEALTHY BODY, COUPLED WITH SUNNY DISPOSITION,  
GAVE ONE SUFFICIENT BEAUTY”**

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## **ABSTRACT**

Facial moisturiser is one of the important components of the facial care segment in Cosmetics and Toiletries industry. Malaysian facial care industry is growing rapidly and offers opportunity for local entrepreneur to gain profit. The rapid innovation pertaining to ingredients used in the formulation of facial moisturiser is one of many challenges confronting the local entrepreneur. "Does ingredients influence the Malaysian consumer's purchasing decision on a facial moisturiser" is the main question in this study. This research was conducted in stages. The samples include students and working women in Malacca. The findings indicated that the local brands facial moisturiser are evolving and local manufacturers are taking effort to formulate product using technologically innovative ingredients and natural extract. However, foreign brands have huge investment on product research and development, in comparison to competitors from local brands. Consumers buy facial moisturiser based on its ingredients regardless of differences in demographic background. Conclusively, consumers in Malacca prefer foreign brand facial moisturiser over the local brands and ingredients is important determinant influencing their purchasing decisions.

## ABSTRAK

*Pelembap muka merupakan komponen penting didalam keseluruhan segmen penjagaan kulit muka. Industri produk penjagaan kulit semakin berkembang dan membuka peluang kepada pengusaha tempatan untuk meraih keuntungan. Salah satu daripada cabaran yang dihadapi pengusaha tempatan ialah berkaitan perkembangan teknologi yang pesat terhadap bahan-bahan yang digunakan bagi menghasilkan pelembap muka. Persoalan yang menghasilkan kajian ini adalah, adakah pengguna memilih sesuatu pelembap muka berdasarkan bahan-bahan yang terkandung didalamnya? Kajian telah dijalankan secara berperingkat. Sampel penyelidikan terdiri daripada pelajar institut pengajian tinggi dan wanita yang bekerja di Melaka.. Hasil kajian mendapati pelembap muka berjenama tempatan sedang berusaha untuk mengatasi pelembap muka berjenama antarabangsa dengan penggunaan bahan-bahan berinovasi dan juga bahan semulajadi tempatan. Namun, pelembap muka jenama antarabangsa menguasai penggunaan bahan-bahan berteknologi tinggi dan menekankan kepada penyelidikan dan pembangunan produk mereka. Secara keseluruhan, pengguna di Melaka memilih untuk menggunakan jenama antarabangsa dan bahan-bahan yang terkandung didalamnya merupakan elemen penting yang dilihat oleh pengguna sebelum membuat sesuatu pemilihan terhadap pelembap muka yang mereka gunakan.*

# **1 INTRODUCTION**

## **1.1 BACKGROUND**

Globally, facial moisturiser was the most important segment in the skin care market, having the largest share throughout the 1993 to 1997 period. In 1997, USD 13.1 billion was spent on facial moisturiser and this constituted 46 percent of the total skin care market, followed by body care with USD 6.4 billion (22 percent) and cleanser with USD 3.9 billion (14 percent). The hand care products and toner each contributed five percent of the total sales and depilatories and face mask each contributed four percent to the sales in 1997 (ECRM-online, 2003).

23% sales of cosmetics and toiletries are contributed by the skin care segment. Facial care product is an important component of this skin care segment. It was reported to be the largest sub sector within cosmetics and toiletries market in Malaysia (Cosmetics and Toiletries, 2004). The overall Malaysian cosmetics and toiletries market recorded sales approximately RM 3 billion or USD 811 million in 2004 (Chua, 2005).

Singapore, a neighbouring country to Malaysia with strong economy demonstrated the following features: The skin care product was the largest sub sector in the cosmetics and toiletries industry, and is worth USD 102 million in 2003. The overall cosmetics and toiletries market was worth almost USD 379 million. The market was dominated by multinational brands. It was reported that, there was only a modest increase in the market sales of cosmetics product in 2003 than previous years, due to no proportionate increase in the consumer base in the country (International Market Report Singapore, 2004).

Similarly, in Vietnam the cosmetics and toiletries market was dominated by multinational. The market growth however, is more aggressive due to the economic growth of Vietnam which has significantly improved the disposable incomes of consumers. Furthermore, around half of the population is under 25 years old, where these young consumers tend to spend more for value added products (Cosmetics & Toiletries in Vietnam, 2006).

Markets for cosmetics and toiletries products in Thailand and the Philippines, however was dominated and driven by locally manufactured products. Imported cosmetic product accounted for only 24% of the total market in Thailand and 30% in the Philippines for the year 2004. The locally manufactured cosmetics in Thailand and the Philippines were however divided into two that are of the local brand and the foreign brand. Brand-name products produced in Thailand, under license from internationally well-known brands, account for 70% of these local productions; while local brands accounted for 10% of the total market (International Market Research Reports Thailand, 2004; International Market Research Reports Philippines, 2003).

The Indonesian cosmetics industry is dominated by cosmetic product that are manufactured domestically and marketed as local brands. The total import of cosmetics product had increased 20% in 2002 from the year 2001; that was USD 18.3 million from USD 14.1 million. The lack of research capability of the local cosmetic industry to develop high quality product were reported to be the reason of the increased import in Indonesia (International Market Research Report Indonesia, 2003).

The largest markets for cosmetic product in Asia are in Japan. The Japan cosmetic and toiletries market is the second largest market in the world, trailing behind the United States. In 2001, sales were worth USD 13.3 billion. This sale however was reported to decrease slightly from the

previous years as female population decreases. The cosmetics products were marketed mainly of local cosmetics manufacturers and only 8.2% from the total cosmetic products available in Japan were imported. The skin care products are the largest sub sector of cosmetics industry which contributes 66%, followed by the colour cosmetics product with 31%, followed by others with 2% and perfumes with only 1% of the total market (International Market Research Reports Japan, 2004).

Overall, the large consumption of facial care products was influenced by consumers' perception on beauty. Other factors that also enhanced sales especially in Asia pacific region are the presence of whitening product and product that protects the skin from UV rays. Hence, the desire to maintain the beauty of the skin is being satisfied by the presence of technologically innovative facial care products (ECRM-online, 2003).

For thousand of years, woman have used different cosmetics introduced through different cultures and from different civilizations. Cosmetics are mainly applied on the face since it is the most exposed part of the body. The beauty revealed through younger and more beautiful skin enhances the image and self confident in many ways (Oumeish, 2001).

The continued growth of facial care market is affected by several factors. Some of the factors are related to demographic changes. Examples that could influence the market include increase number of youth in the population and the greater number of middle-aged population who are concern with their look. Sign of aging especially the appearance of wrinkle on the face of middle-aged woman may cause them to spend more time grooming to minimise the visible effect of aging. In addition, consumer has more disposable income for facial care products as the economy grows. Moreover, the needs for facial care product also increases with the growing number of working women. These

women have greater needs for facial care products due to social pressure and fashion need than women who stay at home. There is also a saying that a good moisturiser is the most important item in woman's wardrobe since you can replace your clothes, but not your skin (Price *et al.*, 2003).

Although the beauty culture was essentially exclusive to women but in recent year, there is an increase in the consumption of facial care product among men. The current growth are related to several factors including their concerns about enhancing attractiveness, reducing the ageing process and maintaining their health combined with pleasure of using grooming products (Strurrock & Pioch, 1998). However, currently the Malaysian market for men's skin care is relatively small to compare to that of women. Clarin Malaysia, one of the leading foreign brands in Malaysia reported that the Clarin's men's skin care product contributed only five percent of the total sales of RM 20 million in 2004. The purchase of Clarin men's products were usually made by wives or girlfriends as gift because men are said to feel uncomfortable to approach beauty counter at departmental store (Raja Adam, 2005).

The skin care products in Malaysia comprised of both the local and foreign brands. Generally the brands in Malaysia can be categorised into four groups. The first group is the local brand that are owned and manufactured by local company; second is the local brand owned by local company but manufactured abroad; third is the foreign brand owned by international company but its product's manufactured locally and finally foreign brands owned by international company and manufactured abroad.



## **1.2 PROBLEM STATEMENT**

There is an upsurge in the presence of local brand facial care products in domestic market nowadays. Up to July 2005, almost 70 000 of different cosmetics products were registered with the Drug Control Authority of the Ministry of Health (Chua, 2005). The facial care industry in Malaysia is very competitive. The local facial care products are confronted with stiff challenges to influence the preference of the consumer.

One of the challenges is the rapid technological development pertaining to the ingredients used in the formulation of facial moisturiser. New and innovative ingredients developed through advanced technology are important to produce excellent quality moisturisers. Science and marketing are working hand-in-hand to create new product trend and to introduce new development (Giacomoni, 2004). Currently, consumption of foreign brands facial moisturiser is higher than that of the local brands. Consumer is one of the immediate external factors for cosmetic firms. Consumers and their preference influence the business activities of firms directly. Hence, a good understanding on consumers and their behaviour is one essential requirement for effective strategic management process (Hashim, 2005). The environmental analysis such as customers' preferences can assist the understanding of opportunities available. The population and income, ways of life, spending patterns, expectation and value need to be anticipated by business firms for them to build strategy on what to do in order to ensure a business's long term survival in the market (Drucker, 2001). Therefore, it is pertinent to conduct a study to identify whether ingredients play a crucial role to influence the consumer's preferences towards purchasing a facial moisturiser. The consumers consist of people with different demographic backgrounds. The ingredients used by both local and foreign brand facial moisturiser need to be identified to determine the relative positions of both the

local and foreign brand facial moisturisers in order to identify the strength of local brands. The marketing aspects of facial moisturiser especially pertaining to advertising approach shall also be studied.

### **1.3 PURPOSE OF STUDY**

The purpose of this study is to examine the influence of ingredients in facial moisturiser on consumer preference towards a particular product by taking into consideration the effect of brand origin and price as well as other marketing elements. The results shall reveal the relative positions of the local and foreign brands facial moisturisers as well as factors that are important in consumer's purchasing decisions. This study could suggest recommendations to the local cosmetic firms on the most appropriate strategies to enhance consumer's acceptance to the local brands facial moisturiser especially in the area of product ingredients and marketing techniques that are able to cater to different needs of consumers of diverse demographic backgrounds.

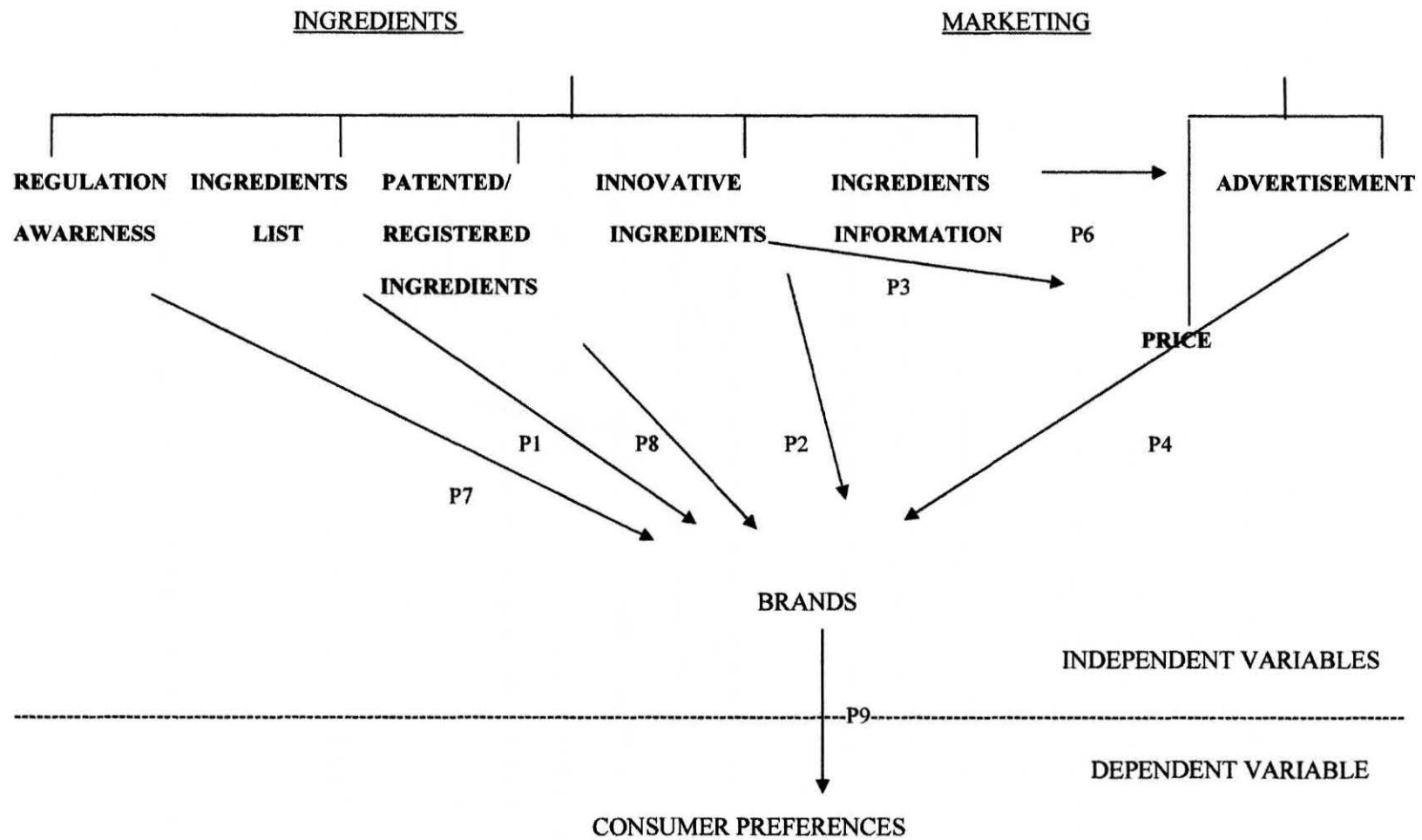
To achieve this purpose, this study was designed in the way that it would achieve several objectives. The first objective of the study is to determine the ingredients used by both local and foreign brands and to identify the strength in the formulae of local brand's facial moisturiser. The second objective is to identify the approaches taken by the local and foreign brands facial moisturisers in promoting the technological content of their product through magazine advertisements. The third objective of the study is to determine the degree of influence that ingredient exerts on consumer's preferences towards facial moisturiser. And the fourth objective is to determine causal factors that demographic differences have on preferences towards several attributes in facial moisturisers. The demographic characteristics considered include age, education level, household income, ethnicity and job status.

#### **1.4 RESEARCH FRAMEWORK**

The variables involve in this study and their proposed relationships are summarised in Figure 1.1. The dependent variable is consumer preferences while the independent variables include awareness on regulation, ingredients list, patented or registered ingredients, innovative ingredients, ingredients information, price and advertisement. The specific propositions are listed in the framework given in Figure 1.1.

The propositions are as given below:

- P1. All brands of facial moisturisers list the ingredients used at the product label.
- P2. Foreign brand's facial moisturiser generally possesses sophisticated or technologically innovative ingredients than that of the local brands.
- P3. The high-priced facial moisturisers possess more sophisticated ingredients than the low-priced products.
- P4. Advertisements of foreign brands facial moisturisers contain more information about the ingredients of the product than that of the local brands.
- P5. Consumers purchase a facial moisturiser based on its ingredients.
- P6. Consumers obtain information on facial moisturiser from the advertisements.
- P7. Consumers are aware to the presence of cosmetics regulation and the presence of unsafe ingredients in facial moisturiser.
- P8. Consumers prefer to purchase facial moisturiser containing registered and patented ingredients.
- P9. Consumers prefer to buy foreign brands facial moisturisers rather than that of the local brands.



**Figure 1.1: Research Framework.**

## **1.5 THESIS OUTLINE**

This thesis consists of five chapters. Chapter one introduces the research questions. Chapter two reviews the related literatures and studies on skin physiology, formulating ingredients and the challenges in facial moisturiser production. This is followed by the importance of brand origin to consumer and their awareness on cosmetic regulations and their sensitivity towards the safety aspects of cosmetics ingredients, as well as the marketing features related to facial care products.

Chapter three provides the research methodology that had been used in this thesis. This chapter presents the approach adopted to assess the research propositions. This chapter also delves on the research hypotheses related to the demographic differences of respondents.

In chapter four, results that have been collected and documented are presented and discussed. The discussion of gathered data begins with the categorisation of facial moisturiser's brands according to their brand origin and price, followed by the documentation and comparison of the ingredients and marketing features in both local and foreign brands facial moisturiser. The findings of the empirical data obtained from the questionnaires were presented and discussed based on related propositions and hypotheses.

Chapter five concludes the thesis. It summarises the findings and highlights them within the context of earlier literatures.

Chapter six includes the research limitations and suggestions for subsequent research.

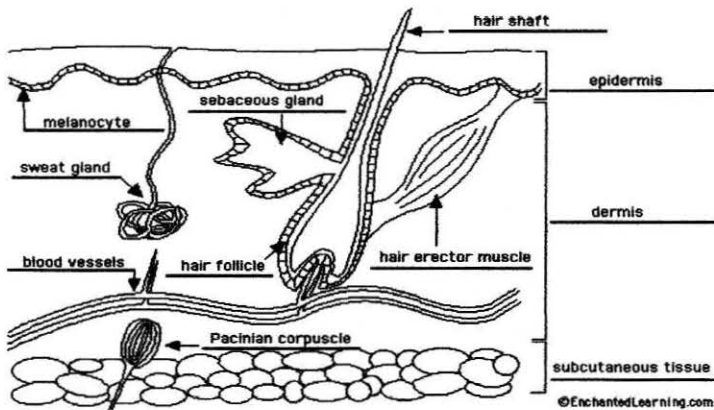
## **2 LITERATURE REVIEW**

### **2.1 Introduction**

This chapter reviews previous literatures that are relevant to the purpose of this study, which is to examine the influence of ingredients in facial moisturiser on consumer preferences towards a particular brand through consideration of the effect of brand origin, price and other marketing aspects. In order to understand the effect of ingredients in a facial moisturiser towards human skin; it is imperative to know the physiology of human skin. Hence, this chapter on literature review begins with the understanding of human skin physiology; followed by the terminology and functions of various ingredients used in facial moisturiser highlighting natural extract and ingredients that cause negative side effect to consumer's health. Since facial moisturiser in the Malaysian market consists of local and foreign brands; reviews relevant to the product brand and their origin are presented. This is followed by overview on existing cosmetics and toiletries regulations for cosmetics in the Malaysian market. The marketing aspects such as product form, packaging, place to purchase, promotion and respective prices shall also be included. The importance of technology on the success of facial care industry and the overall challenges in formulating facial moisturiser are also included in this chapter.

### **2.2 Skin physiology**

Initial understanding of the human skin physiology is fundamental in understanding the effect of ingredients in moisturiser towards skin. Skin has three main structural layers, which are epidermis, dermis and subcutaneous tissues as shown in Figure 2.1.



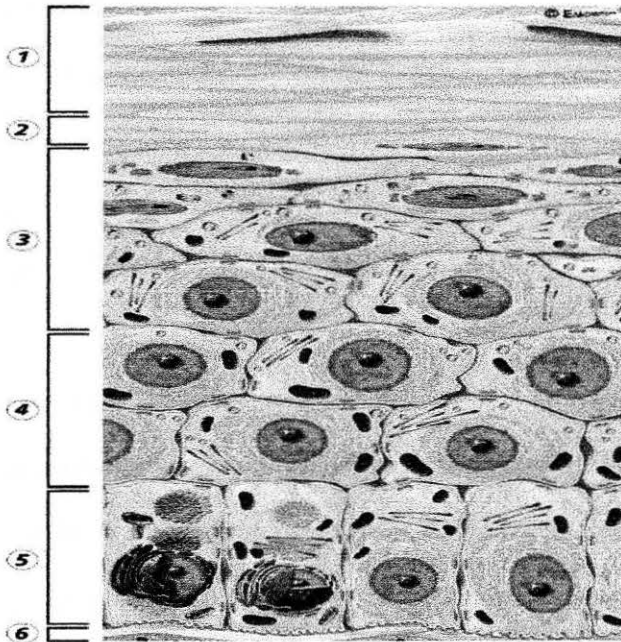
**Figure 2.1: Skin structural layer.**  
**Source: EnchantedLearning.com**

Moisturiser applied on skin only affects the epidermis, and to a limited extent the dermis tissues of the skin. Most moisturising products that claims to be capable of improving the skin appearance and texture acts on the stratum corneum layer of the epidermis because it is the outer layer of the skin. The skin appears rough if the stratum corneum layer becomes scaly.

The epidermis consists of stacked layers of cells in transition as in Figure 2.2. The bottom layers of cells adjacent to the dermis that marked as number 5 in this figure are known as basal cells. These basal cells act as mother cells that undergo cell division producing daughter cells. The differentiation is important to provide continuous regeneration of the skin.

The daughter cells from the basal layer then slowly moved into the outer layers and further undergo various development stages. The next layer adjacent to the basal layer is known as the stratum spinosum or prickle cell layer. The keratinocytes in this layer change morphologically from columnar to polygonal cells. As the cells pass from the stratum spinosum to the stratum granulosum, the keratinocytes continue to differentiate and synthesise keratin and start to flatten.

Stratum granulosum contains enzyme that degrade viable cell component such as nuclei and organelles. The membrane coating granules are also synthesised in this layer (Williams, 2003).



**Figure 2.2: Structure of epidermis 1.Horny layer (stratum corneum), 2.Clear layer (stratum lucidum), 3.Granular layer (stratum granulosum), 4.Prickle cell layer (stratum spinosum), 5.Basal layer and 6. Basal membrane.**

Source: Eucerin.com

Stratum lucidum is a layer in which the cell nucleus disintegrates, and there is an increase in keratinisation of the cells and cell flattening. The stratum corneum or also known as horny layer is the final product of epidermal cell differentiation. Stratum corneum comprises only 10 to 15 cell layers and is around 10 micrometre thick when dry (Williams, 2003). Since the keratinocytes of the stratum corneum are cornified, they are also called corneocytes. Moisturising products often fill in gaps between the cornified cells of the stratum corneum , creating the appearance of smoother skin.

Several mechanisms have been established to be operating in normal condition to maintain the skin moisture. One of the processes is desquamation. Desquamation is a process of shedding the corneocytes from the skin surface to keep skin smooth and healthy using enzymes in well-hydrated