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Investigating the Haircare Product Manufacturing Industry in Trinidad and Tobago

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Abstract: *This paper examines the Haircare Industry in Trinidad and Tobago with particular focus on two stakeholders - consumers and manufacturers. A study was conducted to evaluate consumer attitudes toward hair care products manufactured and explored the challenges faced by local haircare manufacturers in Trinidad and Tobago. An online questionnaire including a measurement scale for ethnocentrism (CETSCALE) was used to ascertain the consumer perspective on locally manufactured haircare products. From a sample of 282 people, it was found that although most consumers are aware of locally made hair care products, only 44% patronise these products. Quality, ingredients and price were found to be the top three factors which influence consumers when purchasing locally made haircare products. A CETSCALE score of 3.2 demonstrated that consumers are non-ethnocentric as it pertains to purchasing locally made hair care products i.e. they purchase more foreign products than locally made ones. Using a compiled database of haircare product manufacturers, 25 companies participated in a study utilising a PESTLE analysis and questionnaire to investigate the challenges faced by haircare product manufacturers. It was found that the major challenges are the lack of legislature in place to deal with the manufacturing of haircare products and the inability to increase market share. Recommendations were made to address these concerns including collaborative efforts among all manufacturers to increase awareness and the formation of a Haircare Manufacturers' Association.*

Keywords: *Haircare Products, Consumer Attitudes, Manufacturing, Product Development*

1. Introduction

In the last decade, there has been an emergence of Small and Medium-sized Enterprises (SME's) that manufacture natural hair care products in Trinidad and Tobago (T&T). Despite the economic importance of SME's, manufacturers of hair care products have faced many challenges when it comes to the expansion of their business. Businesses spend thousands of dollars in advertising and promotion across all platforms and yet they have not reaped the necessary benefits.

To put this into context, these agencies report an annual net profit of approximately $60,000. Some persons have experienced a decrease in consumer activity despite increases in marketing expenditure, while for other SME's sales have remained constant. Studies have shown that consumer attitudes toward products manufactured in developing countries are not very favourable, as foreign products are deemed to be of better quality and of a better value (Wang and Heitmeyer, 2005). Understanding consumer attitudes is essential for any business in crafting strategies to reach consumers and gain market share. There is a need for practitioners to understand the driving force which affects consumer's assessment of hair care products made in T&T. This study focused on a growing industry within the SME sector, and acts as a vital resource for identifying and overcoming issues with the purchasing and manufacturing of hair care products locally.

2. Background

According to Morder Intelligence (2018) and Persistence Market Research (two market research firms based in the United States), there are many factors which drive the growth of the global hair care market. Some of these include an increase in hair and scalp problems, innovative advertising campaigns and technology innovations in product manufacturing. According to a study done by Euro Monitor International (2015), hair care is the leading segment in the beauty market, with a growth rate of 23% since 2013 and has been experiencing a steady increase. Due to the increase of hair related problems among consumers, new hair care product innovations to deal with these problems are in high demand. As a result, there is an increased demand for natural and organic hair care products in these regions (Caley, 2018; Grandview Research, 2016).

In T&T, there has been an emergence of SME's that manufacture natural hair care products. Manufacturing enterprises account for a substantial share of SME's in developing countries as opposed to their service-oriented counterparts (Mead and Leidholm, 1998). There is, however, a paucity of research on the hair product manufacturing industry in Trinidad.

A consumer's decision-making style is a key component to understanding consumer behaviour and the process which goes into deciding or purchasing a particular item. According to Sharp and Sharp (1997), consumer behaviour is the way in which persons make their decisions on purchasing personal products with the use of their available resources such as time, money and effort. Consumer behaviour is influenced by many factors such as opinions, income, family, culture, values and experiences to name a few. Sproles and Kendall (1986) state, "a consumer decision making-style, is a mental orientation characterising a consumer's approach to making choices". There are two prominent factors that consumers use to analyse a product. They are intrinsic factors such as design, taste or performance of a product and extrinsic factors such as price, warranties, brand name and packaging (Elliot and Camron, 1994; Watson and Wright, 2000). As intrinsic factors are hard to determine prior to a purchase, consumers make decisions based on extrinsic factors when they have little to no knowledge on the product (Cattin, Jolibert, and Lohnes, 1982).

Attitude is the consumer's feeling toward a specific object or product. Consumer attitudes toward a product can be defined as "an enduring organisation of motivational, emotional, perceptual and cognitive process with respect to some aspect of the individual's world" (Krech and Crutchfield, 1948). An individual's attitude is an outcome of certain learning processes which is impacted by friends, family, marketing strategy and personal experience (Wang and Heitmeyer, 2005).

There has been a threshold of research that supports the argument that the country-of-origin effect (COE) or 'made in' concept has a major role to play in consumer buying choices and their attitude toward products (Eliot and Cameron, 1994; Adina, Gabriela, and Stonescu, 2015). This is said to be a stronger extrinsic factor used by consumers as opposed to 'brand name, price or quality' when it comes to their evaluation of a product (Elliot and Camron, 1994; Watson and Wright, 2000).

Consumer ethnocentrism (CE) is "the belief that a product deriving from one's ethnic or cultural group is superior to similar products from other cultural or ethnic groups" (IGI Global, 2018). Ethnocentric consumers believe purchasing products from foreign countries is wrong because it hurts the economy, causes unemployment and is unpatriotic to the country of origin (Shimp and Sharma, 1987). It represents the belief of consumers about the appropriateness and morality of purchasing foreign products as opposed to domestic products. However, Herche (1992) disagrees with this concept, stating that consumer ethnocentrism "is a part of human nature and a trait-like property of an individual's personality." Furthermore, it cannot be said that consumers purchasing domestic products are displaying solely ethnocentric behaviour as there may be other underlying reasons as to why persons may purchase domestic over foreign. Studies have shown that consumers in developed countries favour products manufactured in their country and are ethnocentric as opposed to persons in developing countries who are the reverse and favour foreign products to domestic (Wang and Heitmeyer, 2005; Herche, 1992).

According to Batra et al. (2000), consumers in developing countries often seem to emulate western consumption practices and lifestyles, which lead to the purchasing of brands they are exposed to through movies, advertisements and television as well as their travel abroad. Therefore, because the control of 'popular culture' resides in the western countries, with the United States in particular, the media projected to the developing world makes "brands that symbolise affluent western lifestyles seem highly desirable" (Batra et al., 2000).

Consumer decision making styles are connected to consumer behaviour, which is linked to the attitude of consumers toward specific products. As it pertains to Trinidad as a developing country, the Country of Origin Effect or the 'made in' concept plays a role in consumer buying decisions as the literature suggests. Persons from developing countries favour foreign based products as opposed to their domestic counter parts.

The CETSCALE was used "to measure consumer's ethnocentric tendencies related to purchasing foreign versus American-made products" (Shimp and Sharma, 1987). The original instrument consisted of one hundred and seventeen questions and after many refinements and reliability tests, "seventeen items satisfied the reliability criterion" (Shimp and Sharma, 1987). Since its creation, there have been many adaptations of the tool with changes to the number of items, addition of more items and the inclusion of the nationality of the product under study. The CETSCALE was found to predict consumer beliefs, attitudes, purchase intentions and consumer choice (Teo, Mohamad, and Ramayah, 2011). As stated by Shimp and Sharma, (1987) "The concept of consumer ethnocentrism can improve the understanding of how consumers and corporate buyers compare domestic with foreign products." As such, the CETSCALE is a validated instrument that can be used to measure consumer ethnocentrism in Trinidad as it relates to the purchase of locally made haircare products.

3. Methodology

3.1 Study of Consumers of Hair Care Products

A questionnaire consisting of two sections was distributed via SurveyMonkey to consumers of haircare products. Women between the ages of 18-45 years old were used as the criteria for inclusion in the survey sample. Section one consisted of 16 questions and Section two consisted of the CETSCALE. The Cronbach's Alpha score of the instrument was 0.76

which indicated the scale was at a normal degree of reliability. To be considered for this survey consumers needed to be females between the ages of 18-45 years old and purchased haircare products. The population was estimated to be 276,461 persons. According to Saunders, Lewis, and Thornhill, (2007) for a population of over 100,000, a sample of 383 is appropriate. However, due to limitations of the research a sample size of 282 was used in the study. It should be noted that this sample size intends to be indicative of the attitudes of consumers towards locally made hair care products.

3.2 Study of Manufacturers of Hair Care Products

At the time of this research, there was no database available of operating haircare product manufacturers. Therefore, companies that were responsible for events which showcase local items in Trinidad were contacted to acquire a list of vendors. However, only one company was able to provide a list of ten (10) names. As a result, companies were contacted through snowball sampling. At the end of this process, a database of thirty-four (34) businesses was accumulated. To be considered for the study companies needed to be still in operation and registered with the Ministry of Legal Affairs. After the first round of screening, twenty-five (25) companies were left from the original thirty-four (34). A mix of telephone enquiries and email conversations were used to acquire company interest in participating in the study. At the end of this phase, a total of 15 companies agreed to participate resulting in a response rate of 60%. A PESTLE (Political, Economic, Social, Technological, Legal and Environmental) analysis was used to structure interview questions and to gauge participants' views across a range of factors that affect their businesses.

4. Results

4.1 Consumer Results

The questionnaires gathered data on the following areas of consumer behaviour toward hair care products made in T&T: 1) purchasing of hair care products made in T&T, 2) consumer awareness of hair care products made in T&T, 3) the factors that influence consumer decisions when purchasing locally made hair care products, and 4) the level of ethnocentric tendencies by consumers in T&T.

4.1.1 Consumer awareness of local haircare products

Out of the two hundred and eighty-two responses, it was found that sixty-four percent (64%) of the surveyed population are aware of hair care products made in Trinidad, while thirty-six percent (36%) has no knowledge of these products. It was noted that even though sixty four percent (64%) of the participants are aware of hair care products made in Trinidad, only forty-four percent (44%) purchase these products from both online and in store. Furthermore, it was noted that many persons who purchase these hair care products are made aware via social media ads and local hair events which are held every quarter. The other fifty-six percent (56%) do not patronise these products. It should be noted that the three main reasons for persons not purchasing locally made hair care products:

- *Foreign products are better*: The notion that internationally branded products are seen as superior to locally made products. This coincides with studies done by Wang and Heitmeyer (2005) and Herche (1992) which state persons in developing countries favour foreign products to domestic products.
- *Advertising*: Persons have said that hair care products made in Trinidad are not properly advertised to the public. Many did not know these products existed.
- *High Prices*: The price point of imported products is lower than that of locally made products.

4.1.2 Factors influencing consumer purchase of local haircare products

Out of the many factors which influence consumers purchasing habits, it was found that the top three (3) that play a role in the decision-making process for consumers when buying locally made hair care products are Quality, Ingredients and Price which got eighty two percent (82%), sixty-six percent (66%) and forty-one percent (41%) ratings respectively.

The quality of a product was defined by participants as the way in which the product works in one's hair and if the claims made on the product are true. Ingredients, which came second in the ranking, is linked to the upsurge of persons becoming more conscious of the things they put into their bodies as well as what is used externally. There has been a need by consumers for products that are safe and organic. Similarly, the research shows the majority (95%) of local manufacturers use organic ingredients in their products. Thus, this would equate to the high rating given to the factor by consumers. Although pricing came third, it still has a high percentage attached to it. T&T is going through an economic downturn which results in frugality and careful spending. Participants have stated that although local products are a bit pricier than the imported products, they do not mind spending on them as they are getting value for their money.

4.1.3 Consumer ethnocentrism in Trinidad

An adapted version of the CETSCALE (Consumer Ethnocentric Tendencies Scale) created by Shimp and Sharma (1987) was used to enquire whether Trinidad is an ethnocentric or non-ethnocentric society. This instrument originally consisted of seventeen questions, however, the adapted version consisted of ten questions which were modified to suit the Trinidad consumer landscape. The Cetscale measures consumer ethnocentric tendencies through a 7 point Likert scale, the higher the score means consumers patronise products made in their country over foreign products and the lower the score; means consumers are non-ethnocentric and favour foreign based products as opposed to domestic.

Figure 1 shows the respondents' ethnocentrism toward buying local hair care products based on all CETSCALE statements. The level of ethnocentrism in Trinidad is very low as the average score across participants was 3.1 (a larger score indicates greater levels of ethnocentrism). Therefore, it can be stated that Trinidadian consumers are generally non-ethnocentric as pertaining to the purchasing of local hair care products. Though respondent's ethnocentrism level is very low, it can be inferred from the results that once the proper marketing and advertising efforts are employed by local hair care manufacturers the population may be willing to support their products.

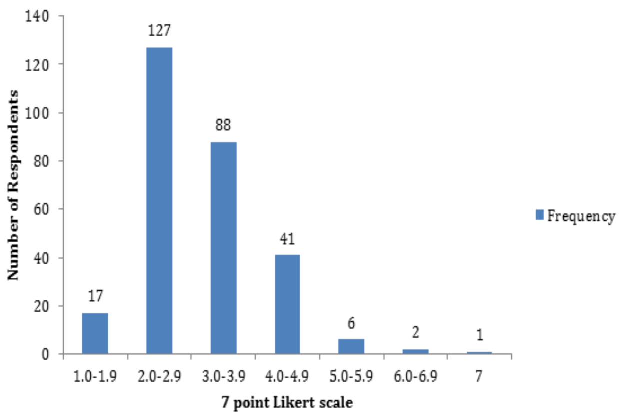

Figure. 1 Consumer ethnocentrism towards buying local haircare products measures via the CETSCALE.

4.2 Results on Manufacturers

The interviews with manufacturers of haircare products took place both over the phone and in person. It took the form of a PESTLE analysis to enquire about the challenges faced by each business as it pertains to the factors. The following are the responses received from participants.

1) Demographic Data - It was seen from the responses gathered, that 87% (13/15) of the owners are female. The businesses employ between 1-6 persons, and make approximately $60,000TTD in net profit per year.

2) Political - Participants expressed concern on the lack of legislature that exists for persons who are in the hair care manufacturing industry. Although there is a small section in the local Food and Drug act that speaks to 'Cosmetics', it only deals with labelling of cosmetic products, which does not include specifics for hair care products. They further explained that the change in government does not have any effect on their businesses. However, some legislature that has been put in place relating to a 7% tax increase on online purchases has been a bit challenging.

3) Economical - The current state of the economy has affected all of the businesses as 80% of them have noticed a drastic slowdown in sales. It was also stated that the 7% increase in online tax has affected them as 73% of participants either outsource raw materials or packaging or in some instances both (see Figure 2). With no tax break for small businesses, they are left to pay high prices in customs and tax duties which will in turn affect the prices of their products. Similarly, 73% of businesses expressed lack of funding by financial institutions as another challenge they face. Majority of these companies are micro enterprises and find it difficult acquiring financial support from institutions such as banks. It was acknowledged that although there are entities that have a number of grants available to SME's, the run around given to persons trying to acquire the information is very discouraging.

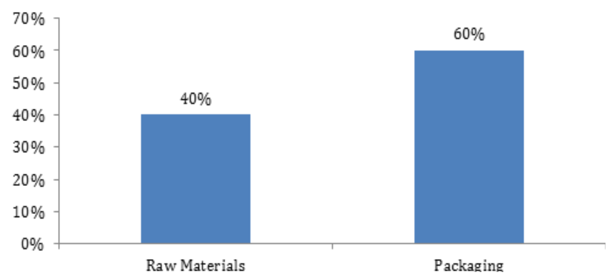

Figure 2. Import of Packaging vs Raw Materials

4) Social - All companies were able to accurately define their target market as women between the ages of 18-45 years of age (this was used as the criteria for the consumer-based survey). The reasoning behind their target market was the need by women among this age group for products that can be compatible with their hair types and scalp conditions. 67% of participants stated that the major challenge faced is the inability to increase market share. It was stated by most companies that thousands of dollars are invested in advertising and marketing campaigns. However, the return on investment is very low.

5) Technology - The necessary equipment needed by all manufacturers for the adequate running of their business is readily available in Trinidad. However, it was explained that a major barrier to expansion is that equipment needed would have to be outsourced at a high cost.

6) Legal and Environmental - It was found that 53% of the surveyed population was familiar with the Food and Drug Act of Trinidad and Tobago and they followed the labelling guidelines for cosmetics as outlined by the Government. However, 80% of manufacturers said they followed the U.S. Food and Drug Act (FDA) as it pertains to the manufacturing and labelling of cosmetic products as well as the ISO standards for quality.

5. Discussion and Recommendations

The findings highlighted areas that can be improved for both manufacturers and consumers. The following recommendations are put forward.

5.1 Local Hair Care Product Awareness

It was seen that although 64% of the sample surveyed were aware of hair care products made in Trinidad, only 44% purchased these items due to the lack of exposure, the price ranges, as well as the belief that international products are better than domestic. It is recommended that hair care product manufacturers collaborate and have an annual 'Product Fair.' This would entail product demonstrations showcasing the use of products on persons' hair, a showcase of new products and an education segment which will educate the public on the ingredients used in products and the benefits to one's hair.

Product samples should also be made available to potential customers at the event, as it would give them a chance to assess the quality of the product and make the decision whether they would be interested in purchasing or not. This will also give manufacturers the opportunity to explain to persons the difference in price point if needed. Another related strategy can entail manufacturers partnering with local beauty YouTube bloggers and Social Media influencers to showcase and review products on their platform.

5.2 Product Quality

It was seen in the findings that quality was the number one factor that played a major role in the decision to purchase locally made hair care products. Quality is a subjective matter as consumers measure quality in different ways. One way of assessing quality by a consumer may be to use the product on one's hair, and once it does not work it would be labelled as a 'bad quality product'. As consumers may not know the different characteristics that deem a product 'a good quality product', manufacturers can follow the ISO for quality standards when preparing their products.

In T&T the Chemistry, Food and Drug Division (CFDD) tests cosmetic products to ensure the purity, safety and quality of them for use by consumers. On their website there is a list of locations a person can go to start enquiring about the services offered and there are also specific guidelines on how to go about getting products tested. Once the report analysis is satisfactory, the division will inform of the next steps. However, if it is unsatisfactory, advice will be provided as needed. The CFDD needs to increase their visibility within the industry to educate business owners/manufacturers on the services that can be offered to them in terms of verifying the quality of their products for use by consumers.

5.3 Revised Cosmetics Legislature

All participants stated there is a lack of legislature that deals with the manufacturing of hair care products. The government should look into revising and extending the 'Cosmetics' section of the Food and Drug act to include the manufacturing of hair care products as it pertains to sale of hair care products, ingredients lists, product testing and packaging. Labelling is currently the only aspect covered under the current act.

5.4 Funding

It was noticed that sourcing of funds by haircare manufacturing businesses is another challenge faced, as they are seen as liabilities to some institutions because of the size of their operations. This is a universal problem when speaking about small and medium enterprises. However, T&T has many measures in place to help curb this problem. Companies can go onto Frederick's Financial and Technical Services (FFTS) website where there is an exhaustive list of institutions which have grants available for persons to access when either starting a business or wanting to finance an existing business. The Ministry of Labour and Small Enterprise Development (MOLSED) also has an entrepreneurship section, where they offer information on programmes geared towards the development of SME's and financing of their businesses.

5.5 Supplier Database

A supplier's database of equipment, raw materials and packaging can be established as a solution to cut down the high percentage of imported products by local hair care manufacturers. In T&T, there are suppliers that deal with wholesale of many of the raw materials used by these companies, which include, Shea butter, mango butter, olive oil, jojoba oil and phenonip (preservative) just to name a few. This database can be uploaded to either the Trinidad and Tobago Manufacturers Association (TTMA) website or the National Entrepreneurship Development Company Limited (NEDCO) website and will be of free access to all manufacturers as well as persons wanting to start a hair care business.

5.6 Formation of an Association

Although, some of these companies belong to different local associations for example 'Things TT' and 'Upmarket TT', due to the findings, it is recommended that an association should be created specifically for hair care manufacturers of T&T. This will also tie in with the above-mentioned recommendations as this governing body will be responsible for the planning of events to showcase products, lobbying for legislature reform, as well as educating manufacturers on the opportunities and programmes that are available to them.

6. Conclusion

In order for the hair care industry in T&T to grow in the next few years, research and development by manufacturers need to be conducted to capitalise on this emerging market. The implications of this is far reaching as the evidence suggests that if there was increased visibility of locally manufactured hair care products, there would be a greater consumption of these goods. It behoves the government to incentivise marketing opportunities for locally made hair care products to boost revenue within the industry and create related industries which can benefit. Consumers are still unaware of these products and are hesitant to purchase due to lack of knowledge.

Opportunities exist for the development of industries which work together with hair care product manufacturers for example, a coconut oil making company. Avenues for employment and entrepreneurial ventures also exist, as there is a need by manufacturers for ‘all-natural’ raw materials and better packaging for these products, which has not been satisfied. Manufacturers should partner with the MOLSED’s ‘Fair share’ programme which helps SME’s develop the fundamentals of their business as well as educates on public procurement opportunities.

Also, by focusing on the key factors that play a significant role in the consumer’s decision of buying locally made hair care products, manufacturers will have the tools to improve their product to a standard where consumers will be willing to purchase. Though this will not be a very easy task as the consumer base in T&T is non-ethnocentric, the more consumers are made aware and are educated on local haircare products, the greater the shift in purchasing behaviour can be expected.

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