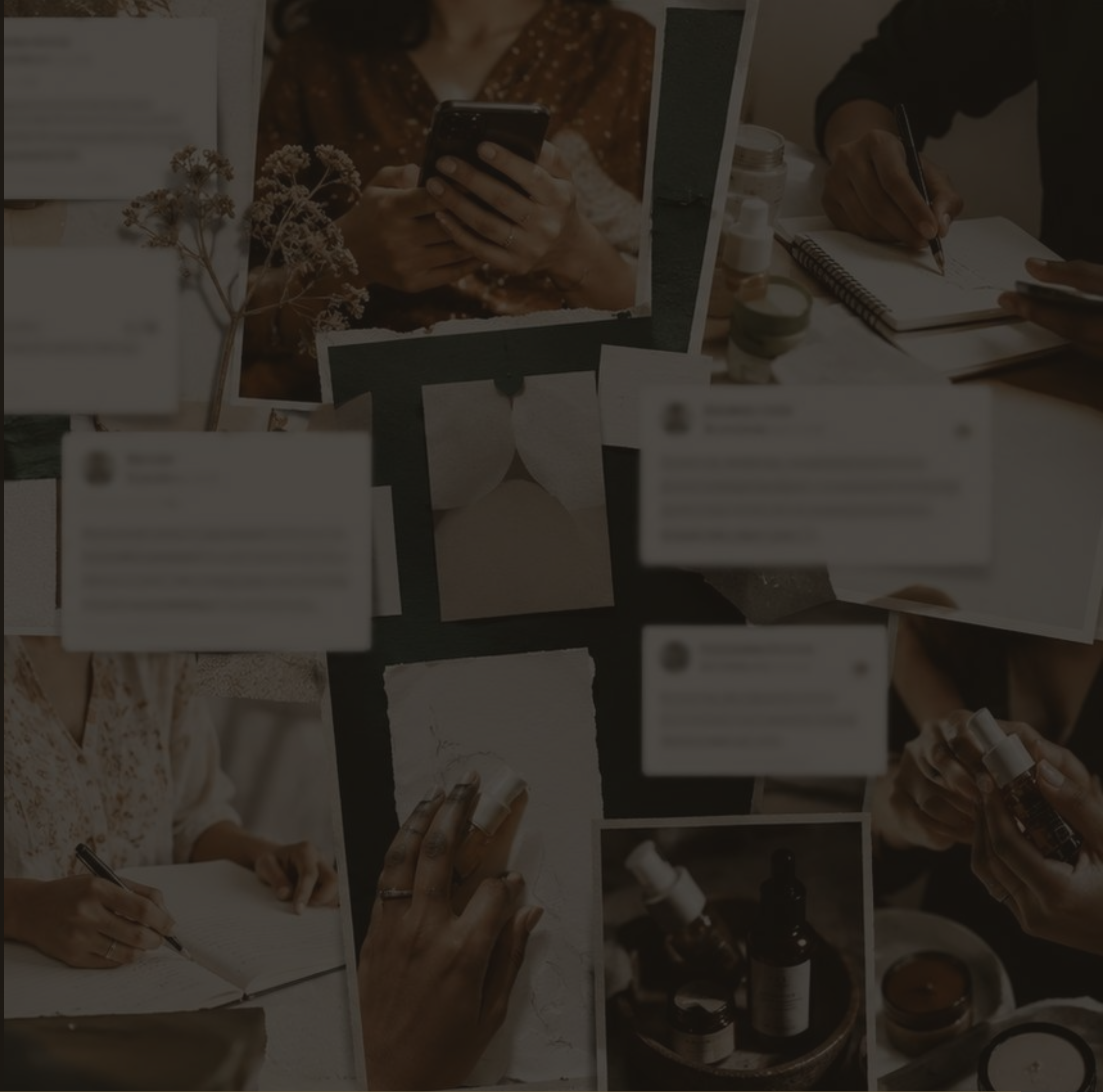
IRA INSIGHTS · PJ AURA

How Indian consumers decide which skincare brands to trust

A 12-IDI qualitative study on D2C beauty discovery, verification, first purchase and repeat behaviour.

The feed wins attention. The bathroom decides loyalty.



CORE THESIS

Trust is not built once. It is tested four times.

01 **Attention is borrowed**

Instagram, creators and ads create the first candidate list.

02 **Trust is verified**

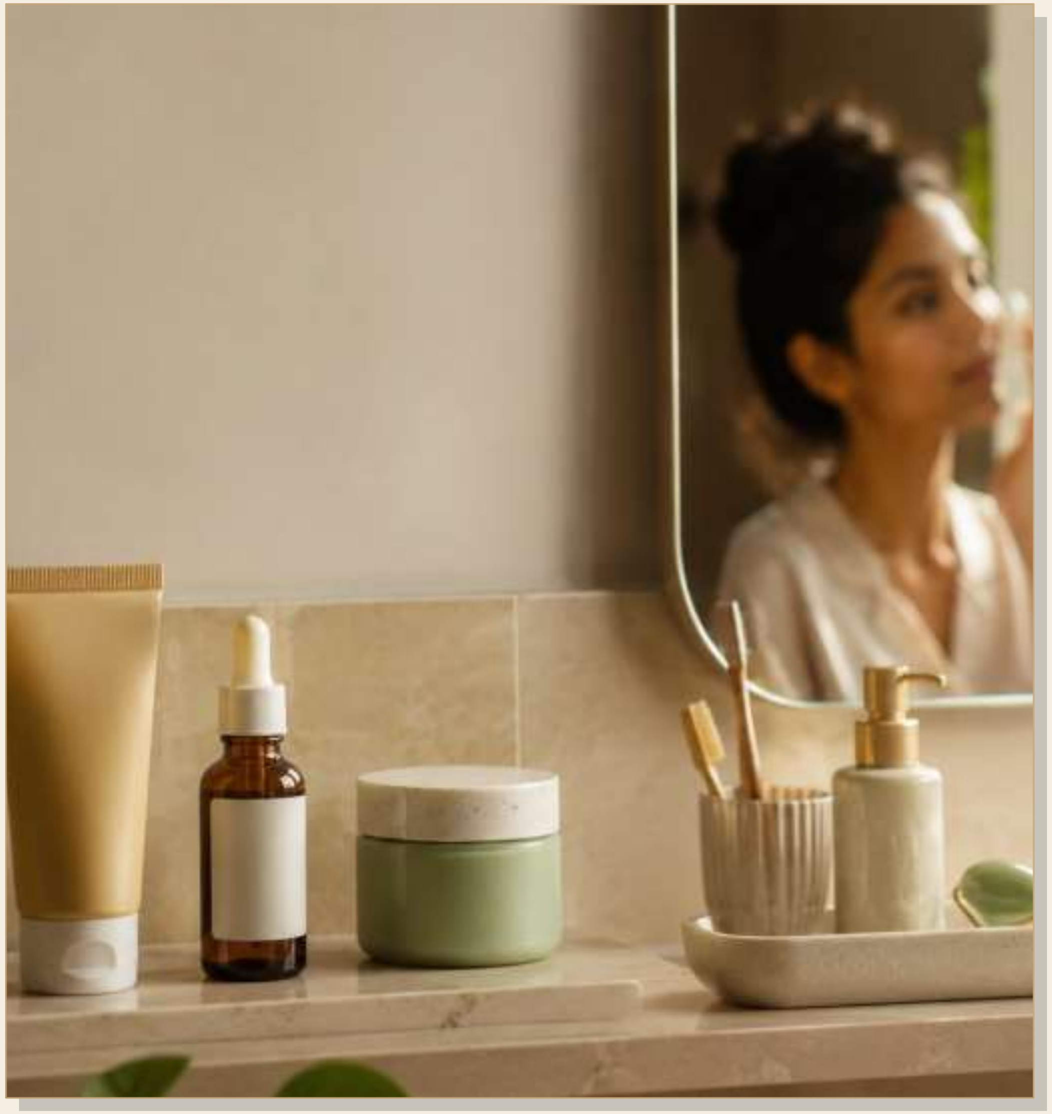
Consumers move to reviews, YouTube, friends, AI and ingredients.

03 **Trial is de-risked**

Different fears need different risk reducers.

04 **Loyalty is experienced**

Repeat depends on skin response, texture and routine fit.



From what consumers claim to what they actually check.

12
depth interviews

30–40 min
1-on-1 Zoom

D2C BPC
recent online buyers

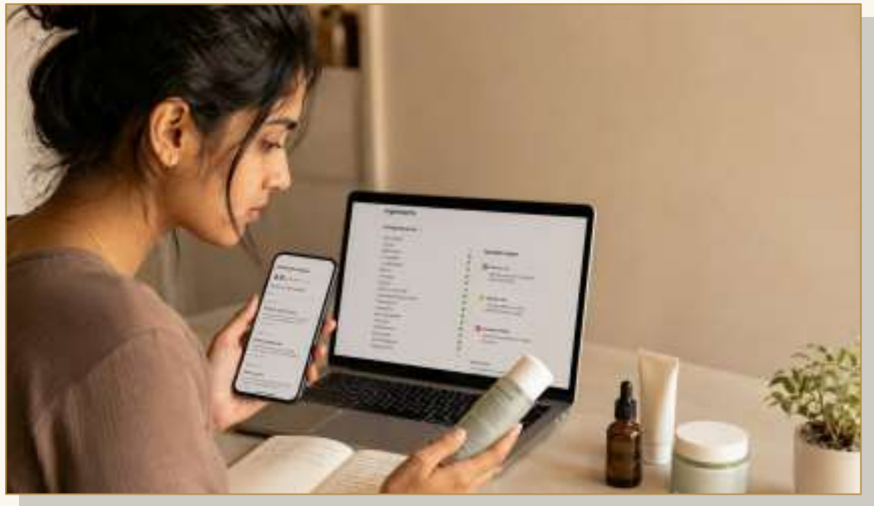
Stimulus
evidence vs aspiration

The guide deliberately avoided asking about “trust” directly. Respondents reconstructed real buying episodes; the analysis decoded where belief formed or broke.

IRA

THE JOURNEY

The D2C skincare path is not a funnel. It is a trial of evidence.



01	02	03	04
Discovery	Evaluation	First purchase	Repeat
"This looks interesting"	"Can I believe this?"	"Is the risk small enough?"	"Did it earn a place?"
Feed, creator, ad, friend	Reviews, ingredients, AI, Reddit	Sale, sample, similar-skin proof	Skin response, texture, routine fit

The strongest brands reduce work at every stage — not just at checkout.

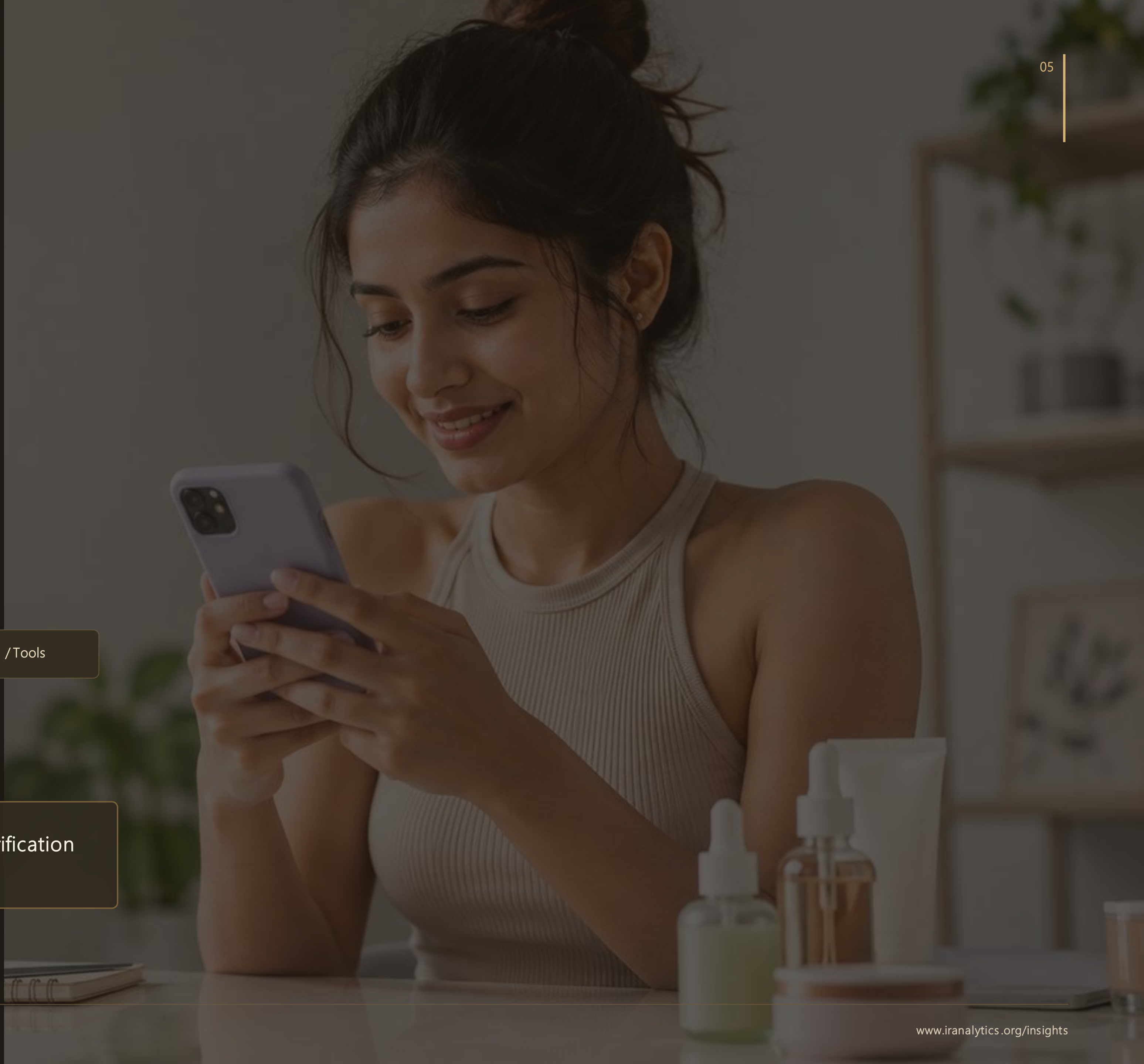
FINDING 1 · DISCOVERY

Discovery creates a candidate, not a customer.

Instagram, creators and ads repeatedly appeared as awareness triggers. But nearly every serious purchase story moved outside the first source before money was spent.

Feed | Friend | YouTube | Reviews | AI / Tools

Brand implication: do not over-invest in awareness if the next verification layer is weak.



FINDING 2 · INFLUENCER CREDIBILITY

Consumers do not reject sponsorship. They reject performance.

01 **Consistency over time**

same product appears across routine videos

02 **Balanced criticism**

creator praises and rejects products openly

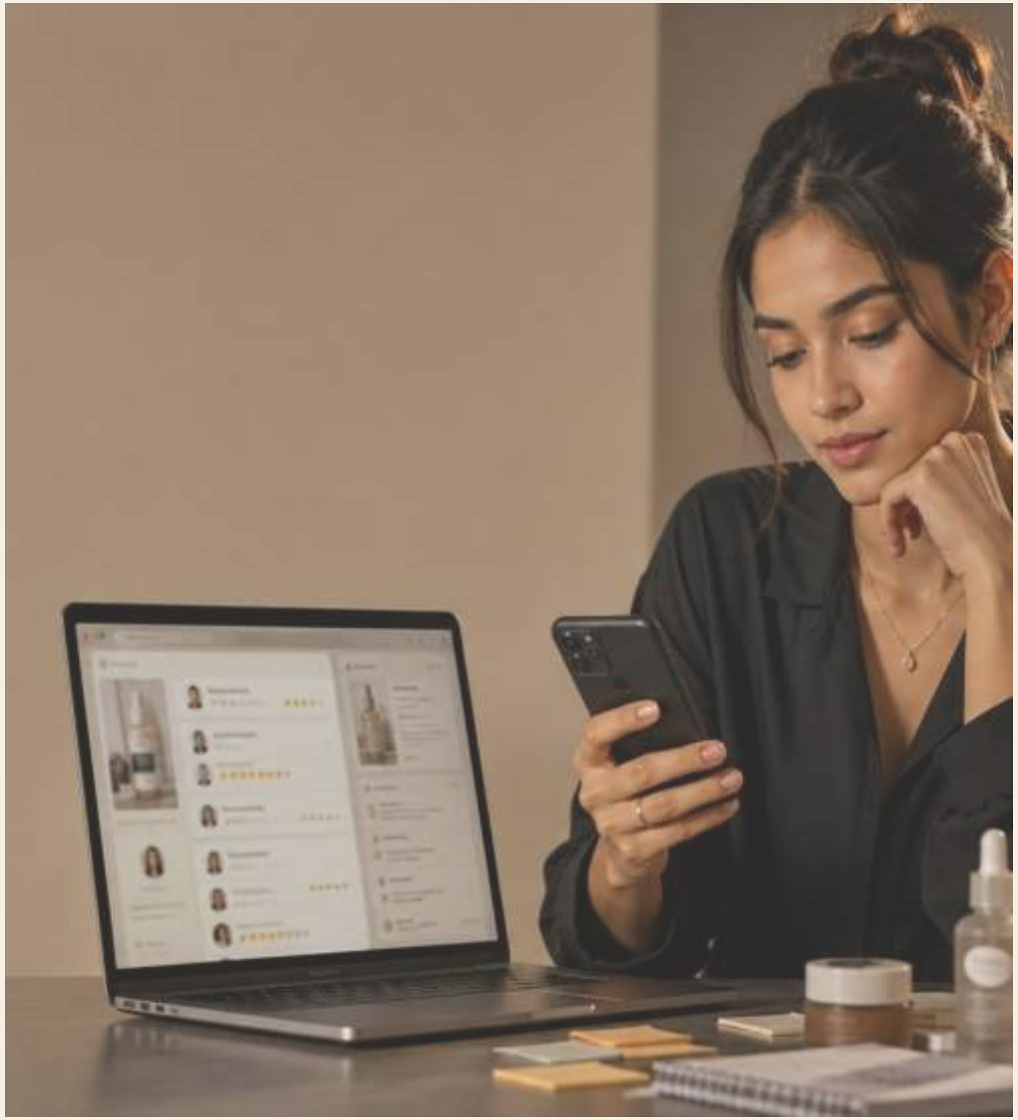
03 **Proof of use**

finished packs, worn packaging, follow-up results

04 **Community check**

comments from real profiles and similar skin types

The credibility unit is no longer “influencer”. It is pattern of use.



IRA

FINDING 3 · VERIFICATION STACK

After discovery, consumers build their own evidence system.

Brand page
claims, price, ingredient list

Marketplace
Nykaa / Amazon ratings and reviews

Creator archive
routine videos, follow-ups, criticism

Peer/family
similar skin, known experience

Tools
ChatGPT, Google, INCIDecoder, Reddit

Self-test
patch test, sample, first application

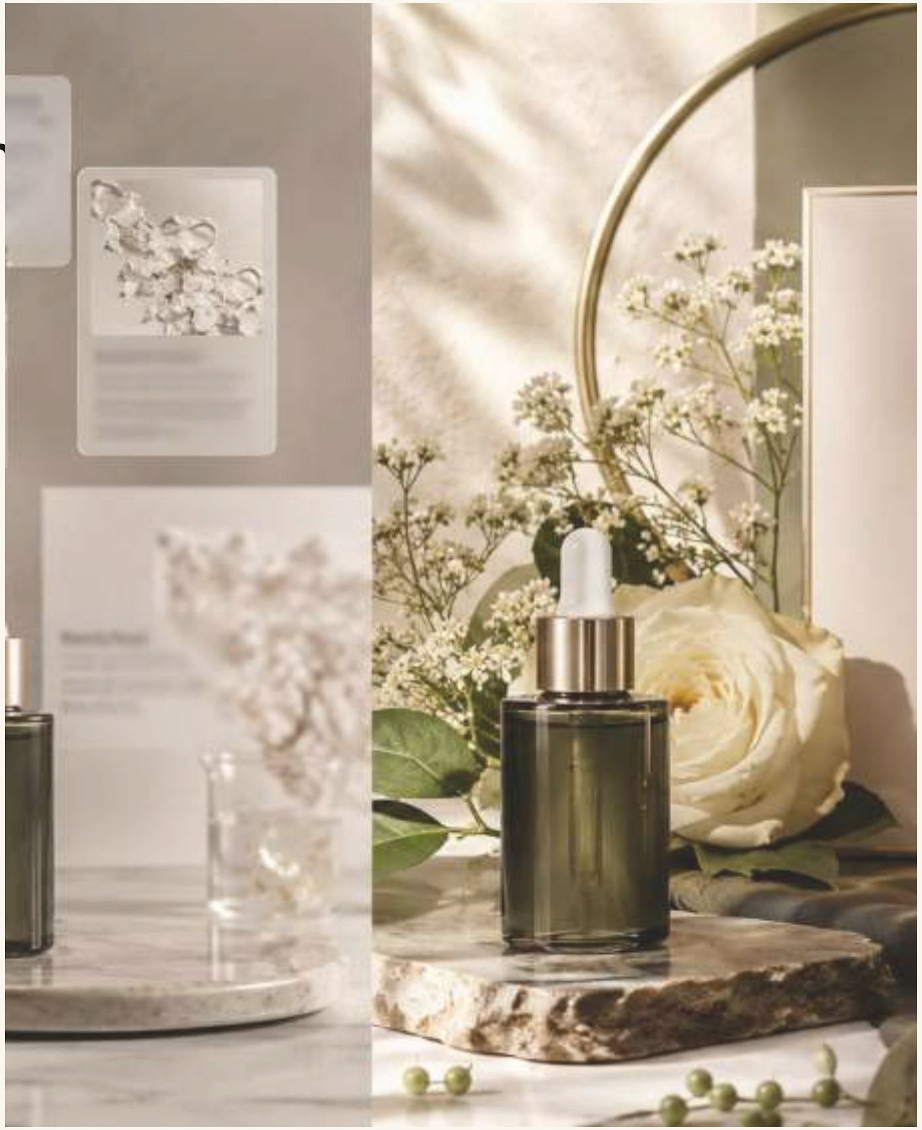
This is why weak product pages leak sales: they push consumers into longer, messier verification loops.

FINDING 4 · PROOF LADDER

“Clinically tested” has become the bottom rung of proof.

Claim	clinically tested, clean, derma recommended
Specificity	pH, %, concentration, non-comedogenic, fragrance-free
External validation	YouTube lab tests, creator critique, marketplace reviews
Personal relevance	skin type, age, climate, texture, routine fit
Experience	visible result, no reaction, repeatable performance

Generic claims do not persuade informed buyers; they trigger further checking.



FINDING 5 · PRODUCT-PAGE STIMULUS

Evidence-led pages won when they reduced checking effort.

What was rewarded	ingredient %, pH, skin-type clarity, recent reviews, realistic claims
What created friction	unfamiliar ingredient names, vague “all skin types”, high price without explanation
What changed the answer	personal ingredient compatibility could beat a cheaper evidence-led option

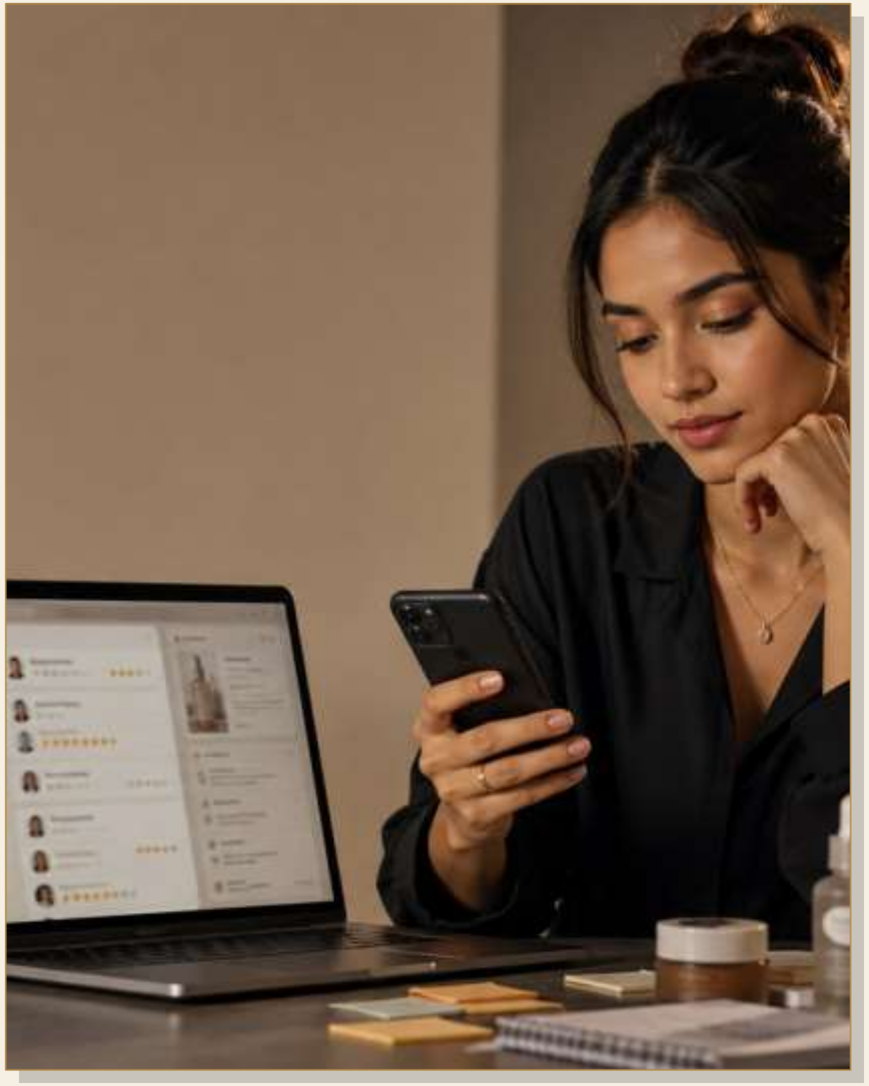
The page does not need to look scientific. It needs to answer the buyer’s next doubt.

FINDING 6 · PERSONAL FIT

The real question is not “is this proven?” It is “will this work for my skin?”

Skin type	oily, dry, combination, sensitive, acne-prone
Climate & routine	Odisha heat, hostel life, makeup, dance/gym
Known triggers	Vitamin C irritation, fragrance, heavy texture, white cast
Life stage	students, early-career buyers, mature skin concerns

Proof only becomes persuasive when it connects to a personal condition.



FINDING 7 · FIRST PURCHASE

There is no single first-purchase risk.

Money risk

Will I waste my budget?

sales, coupons, affordable entry pack

Skin risk

Will it damage my skin?

patch test, sample, similar-skin reviews

Credibility risk

Is the claim real?

external reviews, ingredient checks

Fit risk

Will it fit my routine?

texture, absorption, climate, makeup compatibility

Trial sizes, discounts and reviews work only when they match the risk being felt.

FINDING 8 · RISK REDUCERS

Samples are useful. But they are not always the answer.

Hesitation	Most effective reducer seen in IDIs	Why it works
Price uncertainty	sale / coupon / cost-per-use logic	lowers loss anxiety
Skin reaction fear	patch test / mini / friend with similar skin	creates safer first contact
Shade or texture doubt	similar-tone creator / real application video	makes result imaginable
Premium price doubt	ingredient rationale + expected outcome	justifies why it costs more

The same tactic can fail with one buyer and unlock another because the underlying fear is different.

IRA

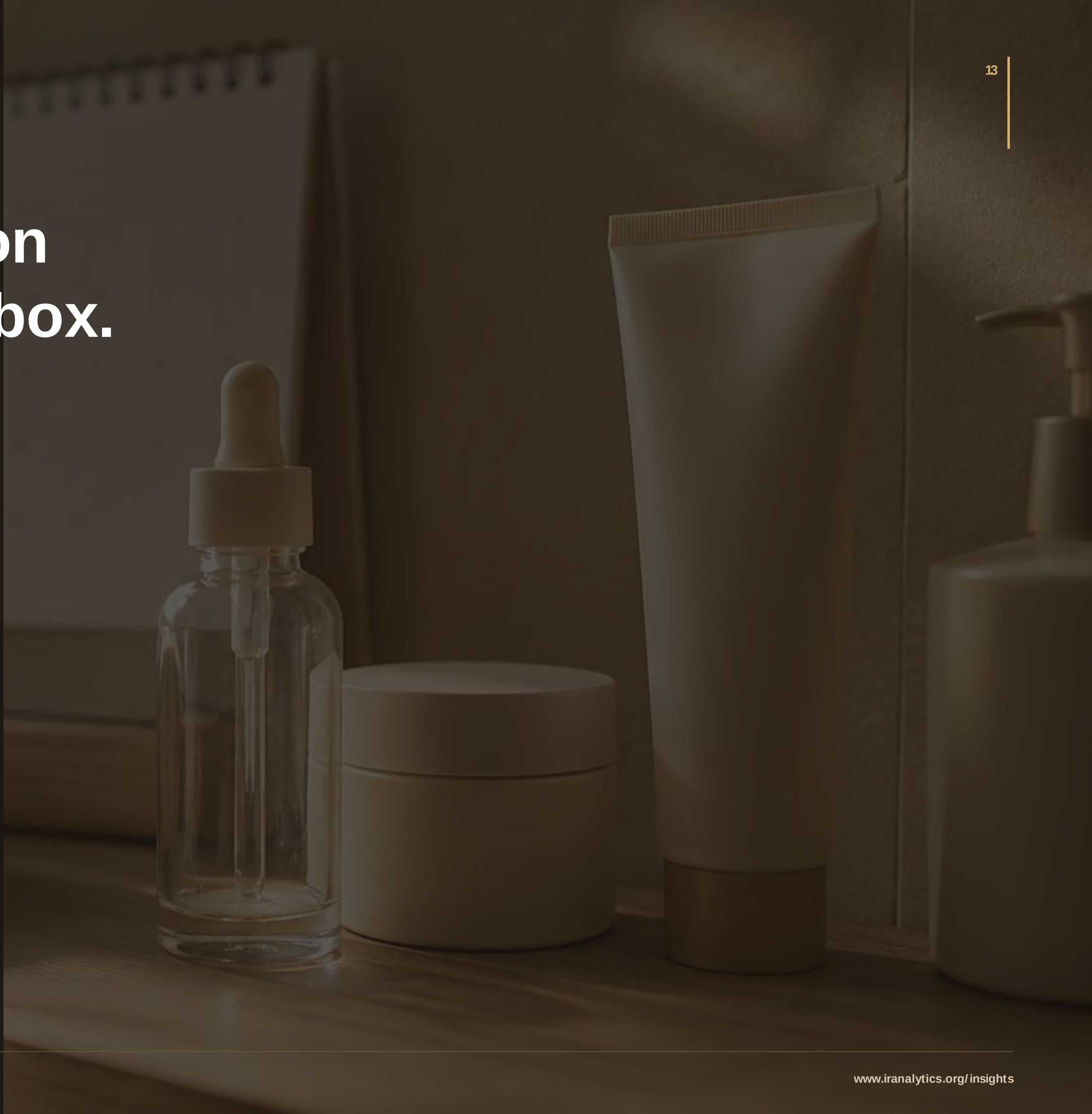
FINDING 9 · REPEAT

The second purchase is won in the bathroom, not the inbox.

Across stories of loyalty, repeat came from visible results, lightweight feel, no side effects, routine convenience and unchanged formulation — not from brand noise.

visible result | texture | no reaction | routine fit

CRM can remind. Only experience can retain.

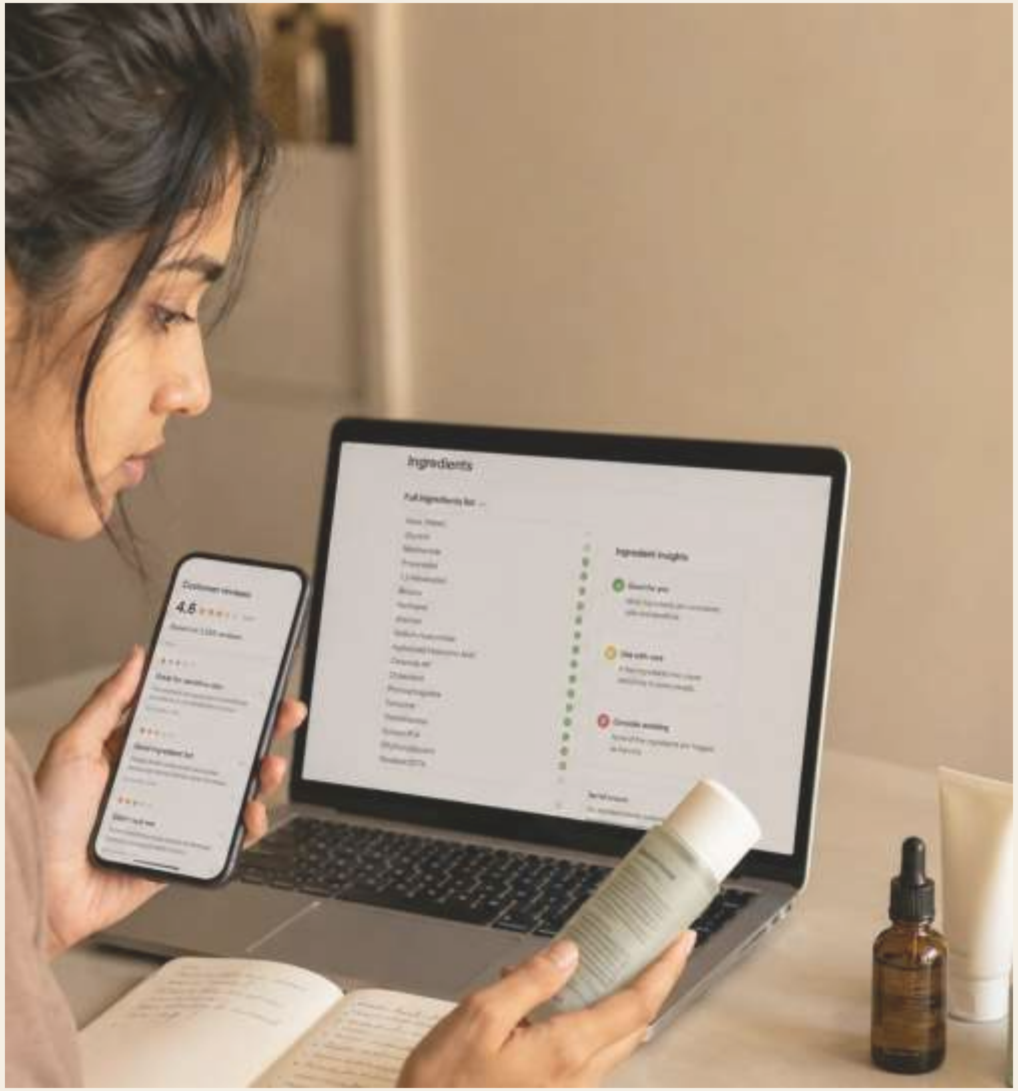


FINDING 10 · CHURN

One bad skin reaction can erase an entire brand.

- ✕ **Breakouts / redness** — the fastest route to permanent avoidance
- ✕ **Sticky / heavy texture** — kills routine fit even when claims are attractive
- ✕ **Fragrance / irritation** — especially damaging for sensitive-skin buyers
- ✕ **Over-promising** — when "tan removal" or "all skin types" fails in use
- ✕ **Quality or formula change** — more dangerous than a moderate price increase

Beauty churn is not always passive. Sometimes it is a protective response.



FINDING 11 · PRICE ELASTICITY

Trusted products can survive price.
They rarely survive betrayal.

Elastic

Can tolerate	20–30% price increase if the product still works
Can rationalize	premium through cost-per-use or visible result
Can switch	non-core products when comparable alternatives exist

Non-negotiable

Cannot tolerate	formula change that damages skin
Cannot forgive	falsified claims or weak safety history
Cannot justify	premium price without personal-fit proof

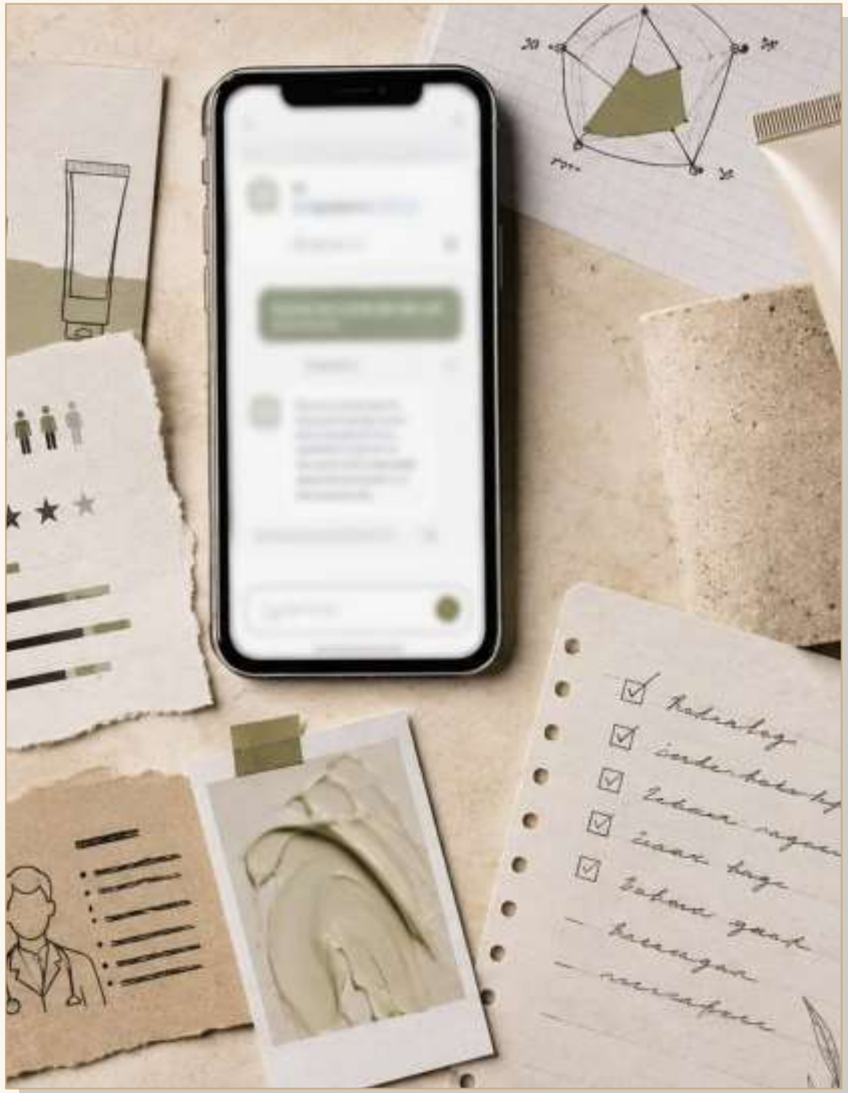
Price is negotiable after proof. Safety and consistency are not.

SEGMENTATION RETHINK

Ingredient literacy has escaped the “skintellectual” niche.

The verifier	checks ingredients, reviews, tools and creators before buying
The routine loyalist	sticks to proven products and resists experimentation
The risk survivor	has been damaged before; scans for triggers first
The deal-enabled explorer	will try new products when price risk drops

The practical split is less about knowledge and more about how much risk the buyer is managing.



WHAT BRANDS SHOULD BUILD

Move from persuasion assets to verification assets.

Ingredient explainer	what it is, why it matters, who should avoid it
Skin-type proof	reviews, creators and claims filtered by actual skin need
Claim evidence	pH, concentration, safety status, method, realistic timeline
Risk reducer	sample, discount, patch-test guide, return confidence
Post-use loop	feedback, reminders only when relevant, formulation continuity

If the consumer is going to verify anyway, the brand should design the route — not hide from it.

BRAND PLAYBOOK

Six moves for D2C beauty brands after PJ Aura.

01 Write claims like a skeptic will check them.

02 Use creators as long-term evidence partners, not campaign media.

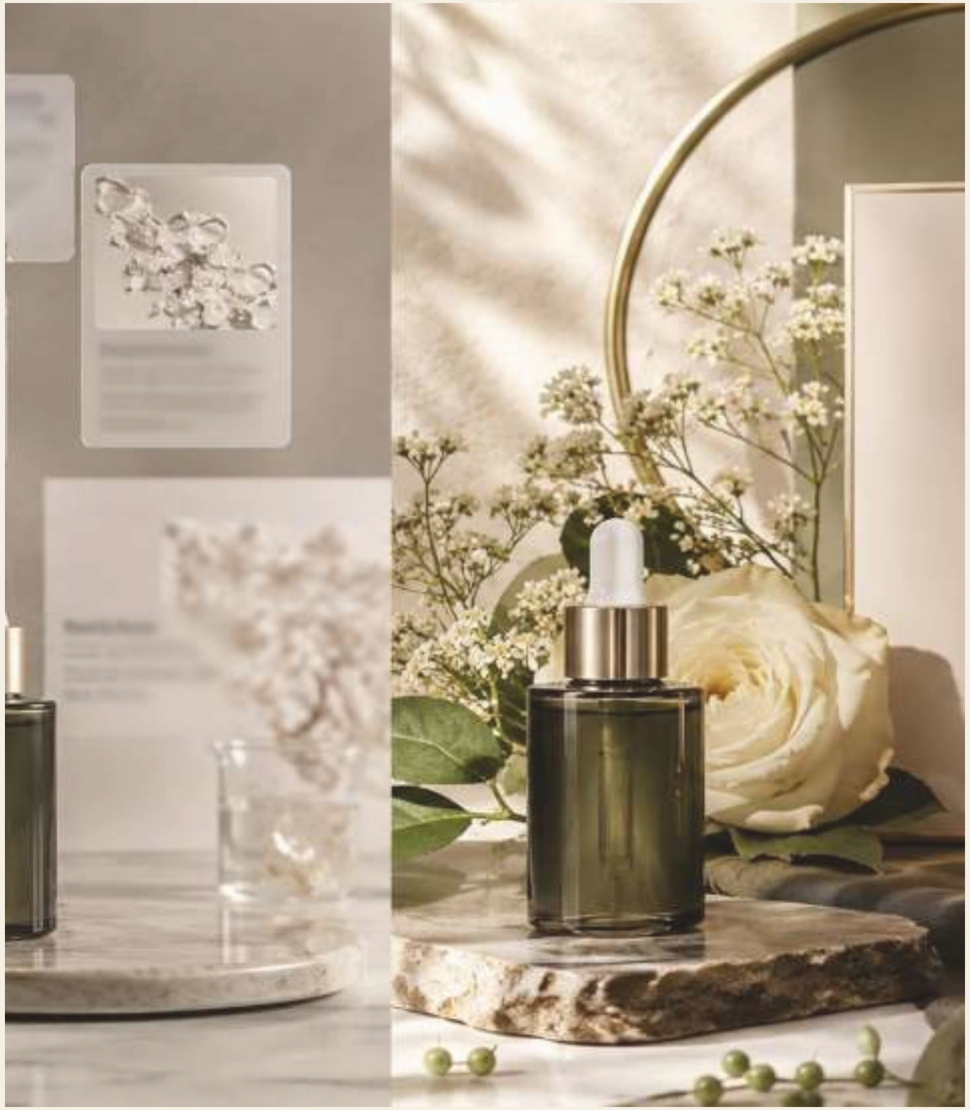
03 Show proof by skin type, climate and texture — not generic benefit.

04 Create different risk reducers for different hesitation points.

05 Treat formulation consistency as a retention asset.

06 Replace noisy CRM with useful replenishment and feedback moments.

The next advantage in D2C beauty will come from reducing consumer doubt, not increasing content volume.



IRA INSIGHTS · SECTOR INTELLIGENCE

PJ Aura turns consumer doubt into a brand-building map.

For D2C beauty brands, the challenge is not just to be discovered. It is to survive verification, reduce first-purchase risk and earn repeat through experience.

Insightful Research & Analytics

www.iranalytics.org/insights · suraj@insightfulresearchanalytics.com