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INNOVATIONS, MARKET TRENDS AND MALE CONSUMERS' BEHAVIOR IN THE COSMETIC INDUSTRY

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Abstract

The cosmetics industry has greatly evolved over the past few years, and men are consuming more and more cosmetics products. The aim of this paper is to provide brands and retailers to understand how men consume cosmetics, and their sensitivity to late trends, depending on demographics and cultural factors. The four selected trends this paper focuses on are “clean beauty”, “body friendly” products, unisex cosmetics and cosmetics routines. In order research these topics, a quantitative study was conducted among 68 respondents in August 2020 through an online survey, presenting the four trends listed above and measuring demographics and cultural variables. The results lead to the conclusions that men who consume the most cosmetics are more likely to be young, in a relationship, in superior socio-professional categories, with a low level of the “uncertainty avoidance” cultural dimension (UAI). They mostly buy functional cosmetics, haircare and deodorants in drugstores and supermarkets. Young men in superior socio-professional categories and in a relationship, who score low on the “masculinity” cultural dimension (MAS) and high on UAI are the most likely to buy clean beauty cosmetics. Young men in superior socio-professional categories and in a relationship, who score low on MAS and UAI are the most likely to buy body friendly cosmetics. Younger men are more likely to buy unisex products. Finally, men in superior socio-professional categories are more likely to buy cosmetics routines. Overall, respondents are willing to pay more for cosmetics products which are “clean” and “beauty friendly”.

Keywords: Men cosmetics, consumers behavior, clean beauty, unisex, Business Studies, Market Research

Resumo

A indústria de cosméticos evoluiu muito nos últimos anos e os homens estão consumindo cada vez mais produtos cosméticos. O objetivo deste artigo é fornecer a marcas e varejistas a compreensão de como os homens consomem cosméticos e sua sensibilidade às últimas tendências, dependendo da demografia e de fatores culturais. As quatro tendências selecionadas nas quais este artigo se concentra são "clean beauty", produtos "body friendly", cosméticos unissex e rotinas de cosméticos. Para pesquisar esses tópicos, foi realizado um estudo quantitativo com 68 respondentes em agosto de 2020 por meio de uma pesquisa online, apresentando as quatro tendências listadas acima e medindo variáveis demográficas e culturais. Os resultados levam à conclusão de que os homens que mais consomem cosméticos têm maior probabilidade de serem jovens, em um relacionamento, em categorias socioprofissionais superiores, com baixo nível da dimensão cultural "evitação da incerteza" (UAI). Eles compram principalmente cosméticos funcionais, cuidados com os cabelos e desodorantes em drogarias e supermercados. Homens jovens em categorias sócio-profissionais superiores e em relacionamento, com pontuação baixa na dimensão cultural de "masculinidade" (MAS) e alta na UAI são os mais propensos a comprar cosméticos "clean". Homens jovens em categorias sócio-profissionais superiores e em um relacionamento, com pontuação baixa em MAS e UAI, são os mais propensos a comprar cosméticos adequados ao corpo. Homens mais jovens são mais propensos a comprar produtos unissex. Finalmente, os homens em categorias sócio-profissionais superiores são mais propensos a comprar rotinas de cosméticos. No geral, os entrevistados estão dispostos a pagar mais por produtos cosméticos "clean" e "body friendly".

Palavras-chave: Cosméticos masculinos, comportamento do consumidor, clean beauty, unisex, Business Studies, Market Research.

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Purpose of the research

The purpose of this research is to understand male consumers' behavior regarding clean beauty, body friendly, unisex cosmetics and cosmetics routines, depending on their age, socio-professional categories, wage, marital status, and cultural dimensions such as masculinity and uncertainty avoidance.

1. Introduction

The cosmetics industry is fascinating. Fast moving and innovative, it is a reflection of the state of the society throughout the years that has been around forever. War paint for warriors, white powder for royalty… all genders, ethnies and social classes have been using cosmetics for centuries. Over the past decades, it was all about women and helping them to reach modern beauty standards : to look younger, to be blond, to have bigger eyes and fuller lips, to please men. But lately, a switch has been observed in the industry. Cosmetics are becoming a mean to express who you are, to be confident, and makeup is turning into a form of artistry. It is becoming unisex, inviting men to liberate from masculine constructs. It is also taking into account modern concerns, such as climate change and users' health. Brands and retailers are concerned with the products they sell, becoming more transparent on the production and the formulations. They start educating their customers about the products they are putting on their skin, and implement CSR strategies. These changes are easily observables when looking at the market: Fenty Beauty and Fenty skincare being the best examples. We see men and women, of all ages and skin colors, putting on cream, wearing lipstick, with recyclable packaging and naturally issued ingredients. Overall, the industry is thriving for positive impact, becoming more and more inclusive and responsible.

Jean-Marc Giroux, president of the COSMED - a French association gathering SMEs from the cosmetics industry - interviewed in April 2020, explains that the cosmetics market is also very powerful, resisting even the slowdown observed in most industries during the financial and economic crisis of 2009-2020. Over the recent year, the sales growth has been constantly increasing, with growth rates above 4% globally in 2016 and 2017, and sales exceeding 300 billions of euros in 2017 for the first time ever.

This resilience in the face of the global economic situation is explained by the fact that physical appearance is becoming increasingly important in developing markets, because the populations concerned get access to a rising disposable income and start spending their resources in products that do not represent a primary need. This trend translates into an inevitable increase in the consumption of personal care products. According to the Xerfi Global report (2018), the emerging markets will indeed keep the demand for cosmetics growing over the next few years, especially the Asian - that represents over a third of the global demand - and Latin American markets, as a result of rising living standards, strong demography, urbanisation, and the spread of Western beauty standards. Another reason for the growth of cosmetics in times of economic and financial difficulty is akin to the lipstick effect theory (Ling, 2012). It states that in times of economic downturn, people still desire to consume unnecessary items, but since they cannot afford expensive items such as jewelry or cars, they choose to turn to cheaper but still psychologically comforting goods.

However, the reasons previously described are not the only ones for the growth of the market. Not only is it experiencing a development thanks to the increase in the size of its market, but also because of a more in-depth evolution of society. The 2018 Xerfi Global report identifies a few of these new growth drivers. The most significant one is the rise of digital channels, and the new retail and communication opportunities they create for brands. But that is not it, lately a few niche segments are emerging as a result of raised awareness about topics such as the environmental concern, diversity and inclusivity. As a consequence, men's beauty, clean beauty and ethnic colour cosmetics are expected to grow even more in the next years. The sustainable beauty market for instance is set to increase by up to 8% to 10% per year in value over the next five years.

If women's cosmetics consumption has been thoroughly researched already, there is still a lot to discover and understand about male consumers behavior. Therefore, this research paper aims to help cosmetic brands and retailers understand how sensitive their consumers, or potential consumers are to innovations and new identified trends emerging, depending on demographic but also cultural aspects, and whether these are worth focusing on in order to attract more male buyers in their shops. Therefore, the research question of this study is : How sensitive are men to emerging trends in cosmetics depending on demographics and cultural factors? In order to provide insights about this topic, a thorough state of the existing literature about the elements of the research question will be presented. The information found will allow to formulate a conceptual model with matching research hypotheses. Then the way the research was conducted will be presented, before moving on to the results analysis. Finally, after considering the process' limitations, some possible implications and recommendations resulting from the empirical research will be explored.

1. Literature Review

2.1. Cosmetics and men's relationship to cosmetics

In this section we are interested in the independent variable of this study, which is the way of consuming cosmetic products. Firstly, it is necessary to define what cosmetics are, how they are sold and by which actors. We will then give a definition of customer's behavior, and understand the relationship between men and cosmetics. Finally, in order to get a better understanding of the discussed topic of this paper, research about the relationship between men and cosmetics will be presented, and the way it evolved over the past few years.

2.1.1. Cosmetics

2.1.1.1. Definition

According to the ANSM (2020), the French national agency for the safety of medicines and health products, a cosmetic product is "*a substance or mixture intended to be brought into contact with the various superficial parts of the human body (epidermis, hair and capillary systems, nails, lips and external genital organs) or with teeth and oral mucosa, in order, exclusively or mainly, to clean them, to perfume them, to modify their appearance, to protect them, to maintain them in good condition or to correct body odors*." If the industry is framed by legislation, in terms of authorized products for example, manufacturers are responsible for the formulations they put on the market. They must ensure that the products offered for sale comply with legislative, regulatory and health criteria for users. A more business oriented definition, provided by the 2018 Xerfi Global report about the global perfume and cosmetics industry, states that "the global cosmetics and perfume market is a multi-faceted sector encompassing a wide range of products aimed at beautifying the face and body, such as make-up, skincare, personal care products and fragrances. It is a dynamic, supply driven market, spurred particularly by constant innovation.".

2.1.1.2. Categories

There exist five main categories of cosmetics products (Hwang, 2004):

- Skin and suncare products;
- Hair care products;
- Deodorants;
- Colours products - more commonly known as makeup;

- Fragrances.

2.1.1.3. Segmentation

The cosmetics market is generally divided into two distinct segments. On one hand, the mass products, that are the most widely spread and cheapest goods, represent 80% of global sales. On the other hand are prestige products, also referred to as luxury since they are more exclusive as well as expensive, generating 20% of sales (Xerfi Global, 2018).

It is however a reductionist vision, since the reality is more subtle. Indeed, the "prestige" part includes a sub-category which explains the significant price differences that can be found within the segment. The Xerfi Global report identifies three main pricing tiers, which coupled with the right distribution channel and targeted customers, allow brands to better manage their image. Besides the mass and prestige products are the “masstige”, or premium products. If the quality of these products is comparable to luxury, they are mainly aimed at mass market customers. They are more widely distributed, with mid-range prices. This offer echoes the phenomenon of the “lipstick effect”. As Jean-Noël Kapferer (2008) explains, the launch of a cosmetic range by a luxury brand offers easy access - in terms of pricing and accessibility - to a highly desirable product and an elevation of social status. Masstige is therefore an even cheaper alternative to high quality products with significant brand value. If we take the example of day creams, a mass market product would be basic Nivea cream, which is sold at around 15 euros per liter. Dior Capture Totale cream, which is a prestige product, is sold for 2,500 euros per liter, 167 times more expensive than Nivea. A brand like Clinique, considered premium, sells their day cream at about 650 euros per liter.

Besides quality and price, cosmetics products are also segmented along three axes: gender, age (baby, youth and senior) and type of product (care or decorative) (Hyundai Research, 2004). This strong and diverse segmentation represents an opportunity for cosmetics brands to differentiate from one another by operating in a wide range of sub-markets.

2.1.1.4. Distribution channels

An internalized brick and mortar distribution would mostly not be profitable, except in the case of flagship stores in strategic locations. Indeed cosmetics brands' ranges are very limited and the cost of retail outlets are too high. Therefore they turn to externalized retailers. Depending on the selected segmentations, brands can distribute through numerous channels. (Xerfi Global, 2018). The higher the brand value, the more exclusive the distribution. Mass market products can mostly be found in drugstores and supermarkets. Premium and luxury products are distributed in department stores, travel retail, beauty institutes and boutique shops. Brands specializing in top of the line care products will prefer pharmacies. In the late years brands and distributors started launching their eshops, and e-commerce is being used as a distribution model by everyone no matter the segmentation. According to Jean-Marc Giroux, president of the COSMED (2020), brands used to be solely in one distribution circuit. Today it tends to explode, they have to be in several circuits. Brands are more interested in reaching as many customers as they can within their target, rather than focusing on a distribution strategy.

2.1.1.5. Leading players and their strategies

According to the Xerfi Global 2018 report, the cosmetics and perfumes market is dominated by mainly American, French and Japanese groups, presented in the table below. Together, they represent the majority of brands on the market, with also luxury brands that have license agreements to distribute their ranges. However in terms of sales, the main groups represent only 27% of the market. Indeed, small independent brands as well as niche brands remain very present, therefore the market concentration remains low.

The groups presented set up different strategies in order to differentiate themselves. L'Oréal, Unilever and ELCO focus on new technologies, while Shiseido, Coty and Beiersdorf focus on marketing and growth through investments in digital networks. Finally, LVMH, Kao, Avon and Puig specialize in the luxury and prestige segments.

Overview of leading perfume and cosmetics companies analysed

unit: 2017 perfume and cosmetics related revenues in billion euros

Name	Country	Revenues	Main perfume and cosmetics brands
L'Oréal		26.02	L'Oréal, Garnier, Lancôme, Cacharel, YSL, Vichi , etc.
Unilever - Personal Care		20.70	Dove, TRESemmé, etc.
Estée Lauder Companies		10.47	Estée Lauder, Clinique, La Mer, MAC, etc.
Shiseido		7.93	Shiseido, Clé de Peau Beauté, bareMinerals, NARS, etc.
Coty		6.77	Covergirl, Rimmel, Bourjois, SallyHansen, Adidas, etc.
Beiersdorf - Consumer		5.80	Nivea, Eucerin, La Prairie, etc.
LVMH - Perfumes and Cosmetics		5.56	Givenchy, Guerlain, Make Up For Ever, Christian Dior, etc.
Kao - Beauty Care		4.62	Bioré, Curél, Goldwell, Kanebo, KMS, Sofina, etc.
Avon - Beauty		3.67	ANEW, Skin-So-Soft, Advance Techniques, etc.
Puig*		1.79	Carolina Herrera, Paco Rabanne, Jean Paul Gaultier, etc.

Source: Xerfi Global with company reports; *2016 revenue

2.1.2. Customers' behavior in the cosmetics industry

Studies in customers' behavior aim to identify who are the customers in a targeted industry or distribution platforms, and understand the where, what, when and how of the action of purchasing (Applebaum, 1951). Customers behavior in the cosmetics industry is influenced by various factors, beyond segmentation (Weber *et al.*, 2002) that all influence each other. These dimensions arise from societal phenomena, such as the digitization of consumption, generational differences, new trends and ecological awareness, as well as gender (Ringim, 2019).

2.1.2.1. Behaviors depending on the purchase platform

Cosmetics are products long considered impossible to sell online, according to Kim Mazzili - co-founder of Horace, a skincare brand for men almost exclusively sold online, interviewed in April 2020 - since they need to be touched, tried and smelled. However, digital channels have now become essential, for the marketing as well as the distribution of these products. As mentioned previously, the digitalization of the cosmetics purchase is a growth driver. Indeed, while the days of the physical stores are far from over, the evolution of e-commerce is too fast to be ignored. Almost half of the "millennials," for example, prefer to shop on a smartphone, tablet or computer rather than in a store, according to Launchmetrics (2018). It is for this reason that the e-commerce trends benefit from being incorporated into an omnichannel sales strategy. According to Kim Mazzili (2020), gender is the main explanatory factor in differences in purchasing behavior online. Online shopping in this category is very low in proportion. In the US 25% buy online, 50% of the population only buys offline in the men's beauty sector. In the case of a younger target, they are more used to buying online and therefore more used to making a switch between platforms, but in the case of 45+ years old, online shopping is rare no matter gender. Liu *et al.* (2013) measured that women spend more, stay on the website longer, come back more frequently than men. They are more interested in key words that appeal to naturalness, while men look for reliable and recognized brands.

2.1.2.2. Behaviors depending on generation

The relationship with beauty has changed a lot in a very short time in Western countries, in particular. Generation Y women have a very customer-centric approach to beauty, for instance (Casper & Briones, 2014). They want tailor-made products adapted to their lifestyle, rather than imposed by brand marketing. Their main focuses are stress and anti-aging matters, and their concept of beauty is defined by the image others have of them. They are also the first to integrate the concept of holistic beauty: to be beautiful on the outside but also on the inside, thanks to healthy products, a balanced diet and an active life. Millennials, or Generation Z, focus on different matters, according to Valentine & Powers (2013). Since they are very little faithful to brands, they rely heavily on neutral and external reviews. Marketing should be direct and honest to please them. But most importantly, and where they differ the most with the previous generation, they use beauty as a mean of self expression, rather than to look attractive to others.

2.1.2.3. Behaviors depending on environmental awareness

Environmental and health awareness, through massive environmental awareness campaigns, and green marketing strategies adopted by some brands, have triggered a shift in everyday consumer behavior, leading to a shift in demand (Amberg & Fogarassi, 2019). Consumers also think about future generations, and they consider protecting the state of the environment more and more during their decisions (Amberg, 2018). They are looking for products that fit a clean lifestyle, not just for the sake of the environment but for their own good as well. Brands are taking initiatives that respect the environment at different levels to support the new demand: production, packaging, transport, as well as ingredients (Nguyen *et al.*, 2019).

2.1.2.4. Behaviors depending on the gender

While most cosmetic consumers are women, recently men have shown increasing interest in the sector (de Cerqueira, de Oliveira, Honório, & de Macedo Bergamo, 2013). Contrary to popular misconception, men and women consume cosmetic products in the same way, in terms of frequency and use (Carter, 1998). Men are starting to pay a lot of attention to premium products, sometimes even more than women (The Nielsen Company, 2016). Men who consume cosmetics have "urban" profiles, that is to say young, educated and employed, who are engaged with his shopping experience (Dholakia, 1999; Piper & Capella, 1993). This type of shopper is both brand conscious and exhibits associations with fashion. However 50% of male cosmetics products bought are by women, buying for their husbands mostly (Mazzili, 2020).

2.1.3. Men and cosmetics

If the existing literature proves that there is an undeniable growing interest in men's beauty, it is important to understand its origin. The following part is dedicated to understanding the relationship between male consumers and cosmetics, and how this relationship is intimately linked with the evolution of masculinity over the years.

2.1.3.1. The modern man has evolved in the face of his masculinity

In order to understand the relationship between men and cosmetics, one must first study how the concepts of masculinity, gender, and the relationship to physical appearance have evolved over the years.

Tuncay (2006), defines masculinity as the socially accepted way of being a man. He says this vision varies depending on several factors, including historical background, geographic location, social status, ethnicity, culture, age, marital status, sexuality and individual differences. In the case of the idea of American masculinity, widely held in Western culture, it is on the one hand to be respectable, in terms of personal success and civic values, while incorporating rebellion, power and autonomy (Holt & Thompson, 2004). In 1994, the term “metrosexual” was used for the first time by Mark Simpson and added a new dimension to the concept of masculinity. A metrosexual man is a man who does not deny his femininity (Souiden and Diagne, 2009), generally in the twenty-first century, living in a large city and concerned about his appearance. This aspect of masculinity is all the more true for the younger generations who are more and more concerned about their physical appearance, inducing a societal change that some call “feminization of masculinity” (Iida, 2004).

Much like the definition of masculinity, the role of gender has evolved. Putrevu (2004) explains that the division of labor between the sexes creates expectations in terms of gender role, which leads to differences in social behavior and personality. According to this theory, men and women act according to the role assimilated to them, which is why for a long time the role of man has been to work to feed his family, while the woman takes care of the children run the house. McNeill and Douglas (2011) stress that the traditional view of men as “producers” and women as “consumers” is now outdated. They explain this by the fact that women contribute much more to family income and therefore that men must participate in activities traditionally qualified as feminine. Gender boundaries are blurred and tend to involve men more in a consideration that used to be feminine: physical appearance.

The media are the main vectors of beauty standards and are increasingly pushing men to focus on their physical appearance (Mc Neill & Douglas, 2011). Most often, the media and advertising will promote men who show signs of youth, dynamism and therefore who must conceal their physical aging (Dano *et al.*, 2003; Souiden & Diagne, 2009).

Beyond the influences of society, physical appearance can be seen as a source of success. It is a social construct and can allow one to enter into a relationship with others (Dano, Roux and Nyeck, 2003). The appearance that a person will have can be a clue to their belonging to a particular group or their desire to belong to it, just as the possession of a luxury item (Bastien & Kapferer, 2008). On the other hand, although appearance is an external aspect of a person, it can also have an impact on the person's internal confidence (Sankaranarayanan & Mekoth, 2014). Studies by Tuncay (2006), and Souiden and Diagne (2009), show that men believe their physical appearance positively impacts their professional success, and that the more one is concerned by his success, the more he is going to care about his appearance. What is more, Dano *et al.* (2003) found that men seek to be good looking in order to please, attract and be loved by potential female partners.

These societal influences and changes lead men, especially the younger generations (Mc Neill & Douglas, 2011), and from all areas, rural and urban (Thota *et al.*, 2014), to be concerned about their appearance. But beyond societal pressure, men take real pleasure in taking care of themselves, and are more and more ready to devote time and money to cosmetic products (Dano *et al.*, 2003) in order to conform to beauty models (Sankaranarayanan & Mekoth, 2014).

2.1.3.2. But has it evolved in his relation to cosmetics?

Cosmetics for men are no longer limited to grooming products, reserved for male customers (Souiden and Diagne, 2009). Indeed, thanks to the new consumers described above who pay attention to their appearance, the market has seen the arrival of a large number of products designed for men such as anti-aging creams, deodorants, body care, etc. (Mc Neill & Douglas, 2011; Bhalerao & Deshmukh, 2014).

If the market is undeniably growing, Kim Mazzilli (2020) recalls that despite the trend of men starting to take care of themselves, they only represent 10% of global sales of cosmetics. Perfume and shaving are still the biggest products in the male market, although shaving products are losing market share with the acceptance of beards in professional context. The average basket of men remains lower than that of women, and only 20% of men use skincare, against 80% who use deodorant in France for example.

On one hand, the first factor explaining the shy growth of male cosmetics market is the fact that the products still have a feminine or homosexual connotation (Dano *et al.*, 2003; Tuncay & Otnes, 2008; Mc Neill & Douglas, 2011; Tuncay & Neier, 2011; Sankaranarayanan & Mekoth, 2014; Barry and Philipps, 2016). Studies found that most heterosexual men want to hide that they buy products such as face creams (Tuncay & Neier, 2011), and that using cosmetics questions their masculinity (Dano *et al.*, 2003).

On the other hand, there are two types of men regarding the relationship to cosmetics (Dano *et al.* 2003). The first category sees it as purely functional and not to enhance appearance (Mc Neill & Douglas, 2011), therefore will expect the product to be effective and will care very little about sensoriality (Mazzilli, 2020). They use cosmetics products as part of a routine, without integrating the notion of pleasure to it, and are not willing to spend a lot on it. The second category is much less represented, these men are much more interested in the pleasure of using these products than in their effectiveness and functional attributes (Nyeck, 2002). We find this type of men especially in studies conducted on homosexual populations.

Women play an essential role in the consumption of cosmetics, not men. They are often those who initiate men (Mc Neill & Douglas, 2011) but also because men more frequently use products already present in their homes, i.e. those of their spouse, their mother or their sister and which are not necessarily made for them (Thota *et al.*, 2014, Bhalerao & Deshmukh, 2014).

According to Tuncay and Otnes (2008), seeking a woman's opinion will allow men to legitimize their purchase. Likewise, Thota *et al.* (2014) indicate in their study that when a man has to choose a moisturizer, he will leave the choice of the brand to his partner because he considers that she is more legitimate than him to choose. Finally, in the majority of cases it is the women who buy the products for them (Mazzilli, 2020).

The purchase of men's beauty products is encouraged by the increase in the number of targeted advertisements (Souiden and Diagne, 2009). Tuncay and Neier (2011) that these ads motivate men to buy in order to have the same attractive appearance they describe. The use by brands of celebrities such as sportsmen, actors and more recently influencers, helps in the acceptance of the use of cosmetic products since they trivialize metrosexuality, and make the preoccupation with the physical appearance a norm accepted by today's society (Cheng *et al.*, 2010).

Despite the progressive trivialization of the purchase of cosmetics, men seek efficiency and discretion when shopping. They are not in a process of discovery, they document themselves and try little, and remain faithful to a product if it satisfies them (Mazzilli, 2020). Price sensitivity is also lower, men are less inclined to pay a high price even though they have higher incomes. Thota *et al.* (2014) explain that unlike women, men make less impulse buying and focus on characteristics such as ease of access to the product - online or in the supermarket - as well as the fact that the products are theirs. intended (Cheng *et al.*, 2010). They will prefer to choose a product with "masculine" packaging elements, such as the use of indications like "for men", or with colors like blue and black (Mc Neill & Douglas, 2011), for fear if not to be associated with a feminine universe (Tuncay & Otnes, 2008).

2.2. Demographics and culture

Now that the topic of the study is defined as well as the way men consume cosmetics products nowadays, we want to understand the extent to which variables such as demographics and cultural background impact the consumers behavior. This part of the study will allow for a more precise understanding of purchasing habits depending on precise profiles.

2.2.1. Demographics

In previous parts of this study, it has been said that some men fit the "metrosexual" profile more than others, and that they are the ones who consume the most cosmetics (Iida, 2004). To verify what was found in this research, we want to measure certain demographic dimensions such as age, belonging to a socio-professional category, marital status and place of life of the men questioned, which have an impact on the way men consume cosmetics (Souiden & Diagne, 2009; Mazzilli, 2020). Younger men, who work, who live in urban areas, and who are in a relationship or married to a woman, are expected to consume more cosmetics than others.

2.2.2. Culture

This part will focus on two cultural dimensions suggested by Geert Hofstede theory (1984). This theory rates countries on a 0 to 100 scale on six cultural dimensions in order to predict how its population is going to respond to given situations.

2.2.2.1. Uncertainty avoidance

The first cultural dimension selected for this study is the notion of uncertainty avoidance (UAI). It is defined by "the degree to which the members of a society feel uncomfortable with uncertainty and ambiguity" (Hofstede, 1984). It implies that the higher the score on uncertainty avoidance, the more the population from a given country will be rigid and conservative towards an unknown and unpredictable future. This cultural dimension was selected because the study of this paper is going to focus on innovation in the cosmetics industry as a moderator, and most of the existing research linking national culture and innovation rates is based on this specific construct, which have been demonstrated to be valid (Hoppe, 1990). It is linked with innovation since the latter implies change, thus increasing the perception of uncertainty (Shane, 1993). Shane also argues "the positive relationship between innovation and uncertainty acceptance suggests the importance of tolerating risk and change when engaging in innovative activity". What is more, Hofstede (1998) founds that because the use of cosmetics go against nature and can potentially harm the skin, is significantly negatively correlated with this dimension. Therefore we would expect men with lower uncertainty avoidance to be more open towards innovation in the cosmetics industry, and the use of cosmetics in general.

2.2.2.2. Masculinity

Masculinity (MAS), as opposed to femininity, resonates with the American view of masculinity by Holt & Thompson (2004) described earlier in this paper. It is described by Hofstede (1984) as "a preference in society for achievement, heroism, assertiveness, and material rewards for success. Society at large is more competitive. Its opposite, Femininity, stands for a preference for cooperation, modesty, caring for the weak and quality of life. Society at large is more consensus-oriented.". The higher the score on this dimension, the more masculine a given society is. In a study released in 1998, Hofstede found that masculinity is significantly negatively correlated with the use of cosmetics. Therefore, we would expect men who score high on masculinity to be less willing to use cosmetics.

2.2.2.3. Questioning Hofstede's theory

While Hofstede's values have been proven relevant over the years, the way it was measured in 1984 is no longer considered accurate. In 2014, he replicated with Minkov the same measurements but using nationally representative population samples instead of only IBM employees, and it turned out they found very close results to the first ones, with strong validity and reliability. However he wrote a paper in 2001 to explain that the data he found cannot be generalizable on the individual level within a country. As this research is not a comparative country study, but a focus on how men react individually to cosmetics and innovation in the domain, these cultural dimensions will be kept but measured individually, without using the data collected by Hofstede and Minkov.

2.3. Trends & Innovations in the cosmetic market

This part will present the four main trends and innovations visible in the sector today, and validated by professionals interviewed in April 2020, in order to measure with a quantitative study if they change the way men consume. All these four trends were confirmed by the interviewed professionals to arouse a growing interest over the past few years (Gasmi, 2020; Giroux, 2020; Mazzilli, 2020; Hutteau, 2020). But first of all we need to understand the link between current consumption and the race for innovation.

2.3.1. Cosmetics brands offer and consumers behavior

According to Sandra Gasmi, founder of Demain Beauty who has worked for 15 years as product manager for Sephora Collection (interviewed in April 2020) cosmetics brands used to not take into account consumer's demand regarding their offer. Today customers no longer adapt, they are educated, expect transparency and if brands do not follow their expectations while others do, they will replace them. There has been a big change between 2015 and today, a transformation of the consumer. It has gone from passive, very respectful of the brands in which he had total confidence, to a consumer who has recovered his free will and who has started to sort out what he was told and what he thought was good for him. Brands are now under pressure to adapt to consumers' demand. However, a brand must remain aspirational. For the first time the customer has been a source of demand, but the role of a brand is to always be at the forefront of what is being done, to educate, to find innovative ingredients and formulations. Besides, Jean-Noël Kapferer (2008) explains that regarding the relationship between brands and consumers, cosmetics are comparable to luxury items in the way that trends are coming from a limited group of consumers, which are mostly popular makeup artists, influencers and celebrities in this case.

2.3.2. Identified topics

2.3.2.1. Clean beauty

According to Justine Hutteau (interviewed in July 2020), founder of Respire Naturel, a brand that claims to belong to the clean beauty segment, clean beauty can be defined as cosmetics with transparent production processes that are respectful to the environment and sustainable, cruelty-free and organic.

In the early eighties, the cosmetics industry was recognized by NGOs as the most advanced industry in terms of consideration of environmental and societal constraints, according to Jean-Marc Giroux (2020). It is still one of the most advanced nowadays, thanks to water recycling in factories, waste treatment, the use of durable raw materials, recyclable packaging, among others (Nguyen *et al.*, 2019). These concerns have been taken into account for a while now, allowing the industry to come close to a circular economy. The new European law for circular economy will further amplify the movement. Today there are still some problems to be solved such as the nature of the plastic used, because it is still not easy to have compatibility between container and content. There is a lot of work left on packaging innovation so that the materials are biodegradable or recyclable, but these are concerns that are considered and integrated in cosmetics R&D departments for the near future.

Jean-Marc Giroux predicts that in 2030, the whole industry will be green oriented. Indeed, according to Sandra Gasmi (2020), fifteen years ago clean beauty was only a niche market, therefore committing into making responsible products required important investments. Nowadays, the conventional beauty market is stagnating, even regressing, from 0% to -1% growth, and the only market progressing is that of natural cosmetics. In 2019, natural beauty grew by 17% and organic beauty by 6% (Gasmi, 2020). These are the only markets that have been growing and have continued to grow for several years now, and all studies confirm that this will continue in the years to come. Jean-Paul Agon, CEO of L'Oreal, which is by far the biggest cosmetics group globally (Xerfi Global, 2018), claimed that the group has a CSR policy that aims for the company to be totally green by 2028. Even if large companies have taken an interest in these approaches long after the small ones, which have more agile production chains, the process is now fully engaged. It is indeed the small companies which created the organic labels, COSMOS which is valid at a European level, but also Ecocert and 1% For the Planet. Big companies that saw the potential bought out a lot of these small companies (Amberg & Fogarassy, 2019). Switching to an industrial cycle that is totally respectful of the environment is a very long process which will be irreversible. There is now a new ISO 16128 standard to be able to claim to be a natural product, but soon organic and natural will no longer be a segment in a few years, but an obligation, still according to Jean-Marc Giroux (2020).

2.3.2.2. "Body Friendly" beauty

Besides environmental concerns, cosmetics consumers also demand for products that are respectful to their body. In 2017, Yuka disrupted the cosmetics market. This smartphone application allows for anyone, in a simple scan, to know whether the ingredients contained in a product are harmful to its health. According to Sandra Gasmi (2020), Yuka has grown so powerful that it has awakened large groups to the need for body-friendly products. There are now "Yuka-compatible briefs" from the laboratories. Brands are forced, not by conviction but by consumers' demand, to formulate products that will not have a negative impact on their health. A 100% mark on a product is however not necessarily optimal regarding the effectiveness of the product, but brands rather follow through the inconsistencies to make sure customers will buy without questioning quality. Yuka also shed a light on the poor quality of products sold in pharmacies, which put groups such as Pierre Fabre in great economic difficulty. Customers are losing trust, which gives great business opportunities to smaller cosmetics brands to develop (Giroux, 2020). However, some big brands such as Clarins are still counting on their reputation and keep including ingredients that are endocrine disruptors, and potentially carcinogenic even in new ranges and sub brands that launched in 2019 (Gasmi, 2020).

Furthermore, besides considering Yuka and other notation platforms in their formulation, cosmetics brands try and innovate when it comes to creating products or involving new ingredients. Sandra Gasmi argues that more and more brands tend to include ingredients that not only will make the skin look better, but will also have a positive impact on the whole body. She calls it in and out beauty, other brands call it "holistic", meaning that they consider the body as a whole. Makeup brands, such as luxury brands like Parfums Christian Dior, develop products such as foundation integrating skincare. Sandra Gasmi believes makeup should not only correct, but also have a treating action, and that brands are right to communicate on it. Brands also start to care to have formulations that are bioavailable, meaning that they will be accepted by the body and therefore be effective (Business of Fashion, 2020). This includes integrating probiotics, prebiotics and postbiotics, which are bacterias naturally available in the human body. Sandra Gasmi explains that if those ingredients have been used by big brands such as Lancôme and Estee Lauder since the eighties, they have been reluctant to communicate on it because they are concerned the use of the word "bacteria" will repel clients. What is more, There is still a great need for education as well as formulation enhancements in this segment, but we are progressively reaching a point at which cosmetics have, if not positive, a neutral impact on the body.

2.3.2.3. Men and unisex ranges

As mentioned previously, even though the men cosmetics market does not explode as expected, there are undeniably more and more brands launching ranges for men only, or even focusing only on men beauty. The latter is the case of Horace, co-founded by Kim Mazzilli (interviewed in April 2020). He explains that traditional brands, such as l'Oréal, struggle to succeed in male cosmetics because they try too much to replicate women's ranges. Giroux (2020) argues that if many brands have at least one product for men, mostly for grooming, only a few are actual specialists or have full ranges. He also confirms that male cosmetics users are mostly men corresponding to the metrosexual characteristics, young, living in big urban areas and with executive positions.

Cosmetics for men are divided in two categories (Giroux, 2020): functional products, or dermo-cosmetics, that meet concrete needs such as shower gel, deodorant or anti-acne creams, and hedonistic cosmetics which would be for instance hydrating cream to fight the effects of pollution on the skin. Hedonistic cosmetics are almost exclusively used among metrosexual men as of today, because these products are assimilated with feminine concerns. Brands, through advertisement, use masculine codes to reassure men in their consumption of cosmetics (Mazzilli, 2020): Nivea uses professional athletes images, Axe argues their products will attract women, WarPaint (makeup brand for men) uses a "combat" lexicon to address their customers.

However, a few luxury brands have been launching makeup ranges exclusively for men over the past few years, such as Chanel, Givenchy, Tom Ford and Marc Jacobs, using neutral codes in their communication. The models displayed in the ads match the metrosexual aspects, while the packaging are black or navy blue and branded "for men", with keyword such as "strenghtening" or "fortifying". According to Kim Mazzilli (2020), these products are initially aimed at the Asian market, and since the market is developing globally, it is essential that such brands differentiate and innovate. Having brands with such a big influence stating that makeup for men is acceptable contributes to changing mentalities (Giroux, 2020).

Besides the trend of cosmetics for men, unisex brands are also on the rise. This is linked with the importance that clean beauty took, since one of its postulates is that everyone has the same skin concerns and needs (Gasmi, 2020). It is also linked with the gradual disappearance of boundaries between masculinity and femininity, since there is less need for a targeted communication (Souiden and Diagne, 2009). According to Kim Mazzilli (2020), unisex can be legitimate on most products, especially on functional cosmetics. However, the concerns of men and women are different, for example in terms of texture and sensoriality : a moisturizer for a man must penetrate the skin very quickly while for women if it penetrates too quickly it is interpreted as if it is not hydrating enough. The big issue with unisex is that most brands actually target women, who are the core users, but are not off-putting to men. However, due to the shift in masculinity, men are more and more interested in unisex cosmetics (Mazzilli, 2020).

2.3.2.4. Shopping experiences

With the increase in the use of digital purchasing platforms, brands and distributors must consolidate their offline position by offering differentiated experiences. According to Sandra Gasmi (2020), the only advantage of going to a brick and mortar store today is to have tailor-made expertise, with trained advisors that explains the appropriate products depending on the needs or type of skin. Sephora, a LVMH company which is the main beauty retailer globally (Xerfi Global, 2018), specializes in advising and educating at the point of sale. It is important, according to Kim Mazzilli (2020), to let customers smell, swatch and try the products before buying. Sephora implemented regular makeup master classes with professional, among other in-shop events, to make their best customers come to the physical store and discover new products.

In the new retail concepts, that allocate only small corners to brands, there is not enough space to allow for much discovery and experience (Mazzilli, 2020), but brands often offer on-site products customization that create an unique experience. For instance Lancôme in flagship Galerie Lafayette stores proposes a technology that allows to make tailored foundation, and By Terry beauty advisors make customized pressed powders from their forty four powder shades in their “Palette Factories” in flagship Sephora Stores (Business of Fashion, 2019). It is more interesting for the retailer because the brand offers them exclusivity which is a real added value for the customer (Mazzilli, 2020).

But today brands and retailers must integrate ecommerce to their strategy. For the diversification of communication and sales media to work, it is essential to create a multichannel system that is coherent and interdependent (Giroux, 2020). This challenge pushes the distributors and the brands to innovate and offer unique customers experiences (Lanchmetrics, 2020). For makeup, the challenge is to be able to show online how the product can be used and the kind of final result customers can expect. This can be done through tutorial videos, as well as augmented reality which was developed by l’Oréal to allow customers to try products and looks just using a smartphone (Gasmi, 2020; Business of Fashion, 2020). One difficult product to buy online is foundation, but brands such as Make Up For Ever and Fenty

Beauty set up on their website and even on the Sephora website, a tool allowing a diagnosis of skin and colour in order to find the perfect foundation among the different ranges and available shades (Mazzilli, 2020). For skincare brands today, in addition to being holistic, it is essential to present not a miracle product but a real simple and effective routine with, for example, a cleanser, a serum and a moisturizer (Gasmi, 2020). It is easier to animate also on social media because more content is created, and with a single product you cannot show convincing results. Skincare brands also use digital platforms to educate their customers, focusing on the ingredients used and their benefits, explaining the gestures to adopt and presenting routines (Mazzilli, 2020; Gasmi, 2020). Since routine comes with fast visible results as well as a clearly explained process, and easier access and purchase to adequate products, these are more and more successful among men (Giroux, 2020). Mazzilli (2020) finally argues that for other brands who do not invest in innovative processes, online platforms still allow for them to have an improved customer service, therefore creating through CRM and social media a strong bond with their customers.

2.4. Hypothesis

The literature presented previously about cosmetics, the relationship men have to it, demographics, cultural dimensions and trends, allows to formulate hypotheses regarding the way men would react to innovation in cosmetics, as well as the way they consume it already.

Hypothesis 1a: Younger men are more likely to buy cosmetics.
Hypothesis 1b: Men living in urban areas are more likely to buy cosmetics.
Hypothesis 1c: Men in superior socio-professional categories are more likely to buy cosmetics.
Hypothesis 1d: Men who earn more money are more likely to buy cosmetics.
Hypothesis 1e: Men who are single are less likely to buy cosmetics.
Hypothesis 1f: Men who are in a relationship or married are less likely to buy their cosmetics themselves.
Hypothesis 1g: Men who score high on "uncertainty avoidance" (UAI) are less likely to buy cosmetics.
Hypothesis 1h: Men who score high on "masculinity" (MAS) are less likely to buy cosmetics.
Hypothesis 2a: Younger men are more likely to buy clean beauty cosmetics.
Hypothesis 2b: Men living in urban areas are more likely to buy clean beauty cosmetics.

Hypothesis 2c: Men in superior socio-professional categories are more likely to buy clean beauty cosmetics.

Hypothesis 2d: Men who earn more money are more likely to buy clean beauty cosmetics.

Hypothesis 2e: Men who are single are less likely to buy clean beauty cosmetics.

Hypothesis 2f: Men who score high on "uncertainty avoidance" (UAI) are less likely to buy clean beauty cosmetics.

Hypothesis 2g: Men who score high on "masculinity" (MAS) are less likely to buy clean beauty cosmetics.

Hypothesis 3a: Younger men are more likely to buy body friendly cosmetics.

Hypothesis 3b: Men living in urban areas are more likely to buy body friendly cosmetics.

Hypothesis 3c: Men in superior socio-professional categories are more likely to buy body friendly cosmetics.

Hypothesis 3d: Men who earn more money are more likely to buy body friendly cosmetics.

Hypothesis 3e: Men who are single are less likely to buy body friendly cosmetics.

Hypothesis 3f: Men who score high on "uncertainty avoidance" (UAI) are less likely to buy body friendly cosmetics.

Hypothesis 3g: Men who score high on "masculinity" (MAS) are less likely to buy body friendly cosmetics.

Hypothesis 4a: Younger men are more likely to buy unisex cosmetics.

Hypothesis 4b: Men living in urban areas are more likely to buy unisex cosmetics.

Hypothesis 4c: Men in superior socio-professional categories are more likely to buy unisex cosmetics.

Hypothesis 4d: Men who earn more money are more likely to buy unisex cosmetics.

Hypothesis 4e: Men who are single are less likely to buy unisex cosmetics.

Hypothesis 4f: Men who score high on "uncertainty avoidance" (UAI) are less likely to buy unisex cosmetics.

Hypothesis 5g: Men who score high on "masculinity" (MAS) are less likely to buy unisex cosmetics.

Hypothesis 5a: Younger men are more likely to buy cosmetics routines.

Hypothesis 5b: Men living in urban areas are more likely to buy cosmetics routines.

Hypothesis 5c: Men in superior socio-professional categories are more likely to buy cosmetics routines.

Hypothesis 5d: Men who earn more money are more likely to buy cosmetics routines.

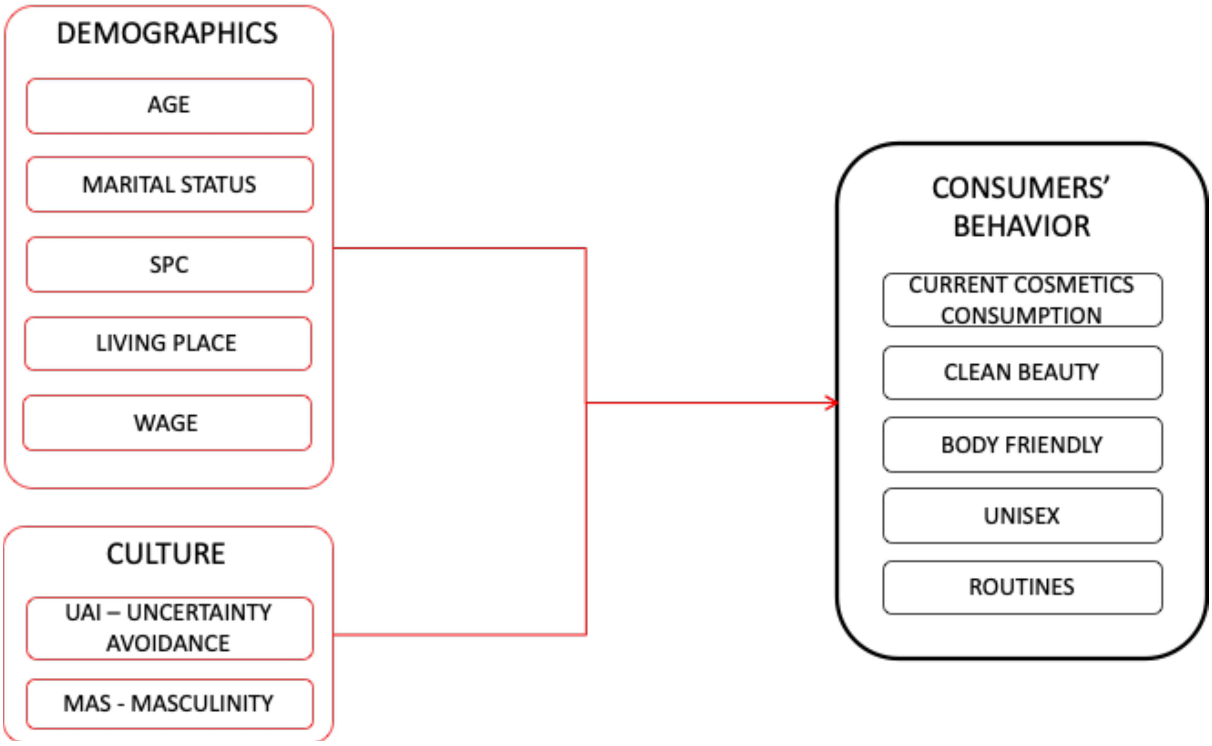
Hypothesis 5e: Men who are single are less likely to buy cosmetics routines.

Hypothesis 5f: Men who score high on "uncertainty avoidance" (UAI) are less likely to buy cosmetics routines.

Hypothesis 5g: Men who score high on "masculinity" (MAS) are less likely to buy cosmetics routines.

2.5. Conceptual Model

Based on the hypothesis derived from existing literature, the conceptual model of this research is as follows. It is composed of two main independent variables, demographics and culture, that are divided in sub variables which are expected to have individually an impact on the dependent variable according to existing literature. The selected dependent variable that will be measured in the quantitative research is the purchase of cosmetics products. It is subdivided into current consumption, and the four presented trends.



3. Methodology

In this section, the methodological approach of the research will be presented in details to confirm the validity of the study.

3.1. Participants and design

The research for this paper was conducted using the data collected through an online survey, called “Google Form”. Sixty eight people participated in the study. The only condition to participate is to be a man. The snowball sampling method was used, by posting the link to the survey on social media, namely LinkedIn, Whatsapp and Facebook. The independent variables considered are demographics and culture - including the dimensions of masculinity and uncertainty avoidance, the dependent variable is the cosmetics products purchase, and the moderators are the concepts of “clean beauty”, “body friendly” cosmetics, unisex cosmetics and “routine” cosmetics.

3.2. Cosmetics consumption behavior

Each participant was asked to describe its cosmetics consumption behavior by selecting the categories of cosmetics he currently buys, among functional skincare, hedonistic skincare, haircare, deodorant, makeup fragrances, or none of these. A definition of functional and hedonistic skincare was provided. Then they were asked where they buy their products, among the following options: supermarket, drugstore, department store, brand’s shop, specialized retailers, beauty institutes, travel retail, online, or none of these. Participants then had to indicate what matters the most to them when buying cosmetics products, among packaging, ingredients and formulation, advice provided by professionals, smell, texture, price, eco-friendliness, “for men” mention, width of the choice of products, other consumers’ reviews, and other. They were finally asked whether they buy their cosmetics themselves, answering on a scale from 1 (never) to 5 (always). There is no question about their average basket because according to Mazzilli (2020), men tend to underestimate their cosmetics spending, therefore it would have been a bias.

3.3. Demographics and culture

To measure uncertainty avoidance and masculinity in the survey, I used the cultural value scale (CVSCALE) validated by Yoo *et al.* (2011). The questions Hofstede used in his original survey to evaluate the cultural dimensions because if it has an adequate reliability at the national level, this scale was found to have an unacceptably low reliability on the individual level. The question consisted in a self-evaluation from the respondent of his opinion regarding the way he manages work situations, and his opinion on male assertiveness and social representation of women, using a scale from 1 (completely disagree) to 5 (totally agree). There were two sets of questions, 5 measuring uncertainty avoidance, for instance “It is important to have instructions spelled out in detail so that I always know what I’m expected to do.”, and four questions to measure the masculinity index such as “Solving difficult problems usually requires an active, forcible approach, which is typical of men.”. Before asking the questions, a short text explained the purpose of this part. The reliability of the scale used to measure uncertainty avoidance was good (alpha = .80), as well as the reliability of the scale used for masculinity (alpha = .77).

In order to determine the respondents’ demographics, they were asked about their gender, age, place of living, marital status, socio professional category, salary, and nationality.

3.4. Cosmetics trends

The four selected trends (clean beauty, body friendly cosmetics, unisex cosmetics and routines) were presented one by one to the respondents, with a short text to explain what it consists in, then two or three examples of products or brands were provided. Respondents were then asked if they would buy this type of cosmetics, which categories of cosmetics, where they would buy it and finally, if they would be willing to spend more than they actually do on this type of cosmetics.

3.5. Procedure

The study began with a brief introduction to explain the purpose of the questions, and also to specify only men’s responses will be used. Then the participants were then asked about their demographics, cultural evaluation, and then all four identified trends. Finally, they were invited to write comments about the survey and the topic of the study.

4. Results

4.1. Sample

This research was realized using the responses of 68 respondents. They are exclusively men, since it was a prerequisite to answer the survey. The minimum age recorded was 21 years old, and the maximum 70 years old (M = 30.84, SD = 14.73). Executive and senior professionals represent 33.8% of the respondents, intermediate occupations 26.8% and students 25.4%. Half of the respondents are single, the others are either in a relationship or married. 95.6% live in urban areas, among which 45.6% live in a capital city.

There is no need to check for outliers since most of the variables are dummies, therefore all observations should be included. What is more, the other variables are scales from 1 to 5, for which all variation will be interesting to measure.

In order to be able to perform linear regression analysis, three assumptions need to be checked: independence of the observations, linear relationship, and normality. In this research, the independence of the observations are assumed, because the study was designed to avoid matching in responses. Therefore there is no relationship between the observed score between respondents. This implies the expected correlation between the residuals of a regression analysis are zero. A means comparison coupled with a linearity test showed that there is a linear relationship between the dependent and independent variables ($p > .05$), therefore linearity is assumed. The normality assumption is checked using the skewness and kurtosis of each variable. All variables have a skewness comprised in a [-2;2] interval, and kurtosis between [-7;7], except for the variable "Urban". If we exclude the latter, a normal distribution can be assumed for this sample.

4.2. Current cosmetics consumption

Regarding the current cosmetics consumption of the respondents of the survey, the two histograms below show what categories of cosmetics they buy, and where. This shows that the most consumed cosmetics categories are deodorant and fragrances, and the cosmetics are mostly bought in supermarkets and drugstores.

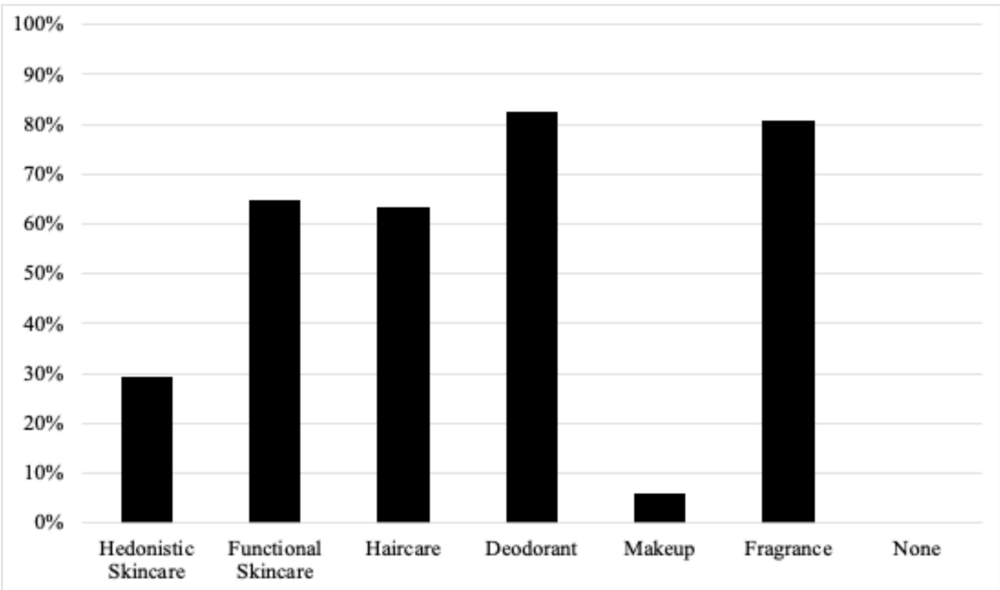


Figure 1: Cosmetics categories currently consumed

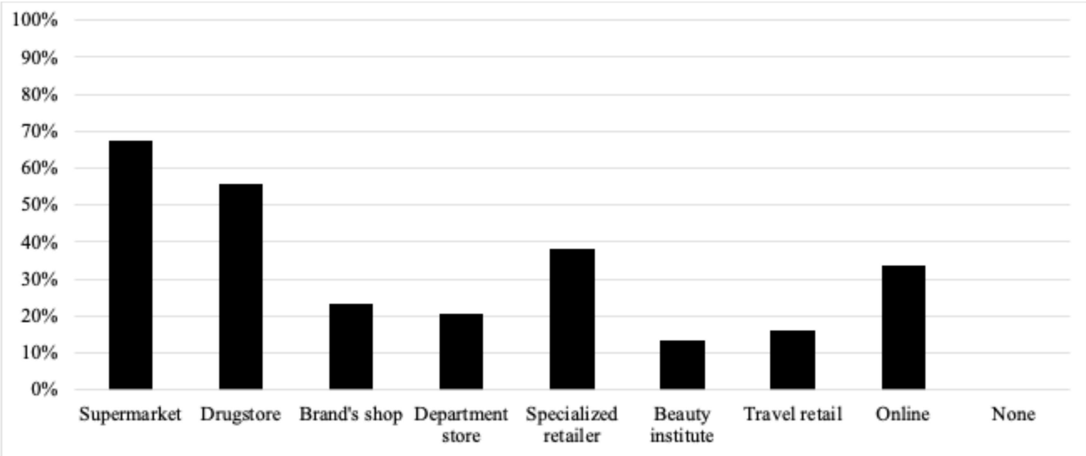


Figure 2: Places visited to buy cosmetics

The histogram below shows the most important attributes when buying a cosmetics product according to the respondents. It shows men care the most about the smell, the price and the formulation of the product before buying it.

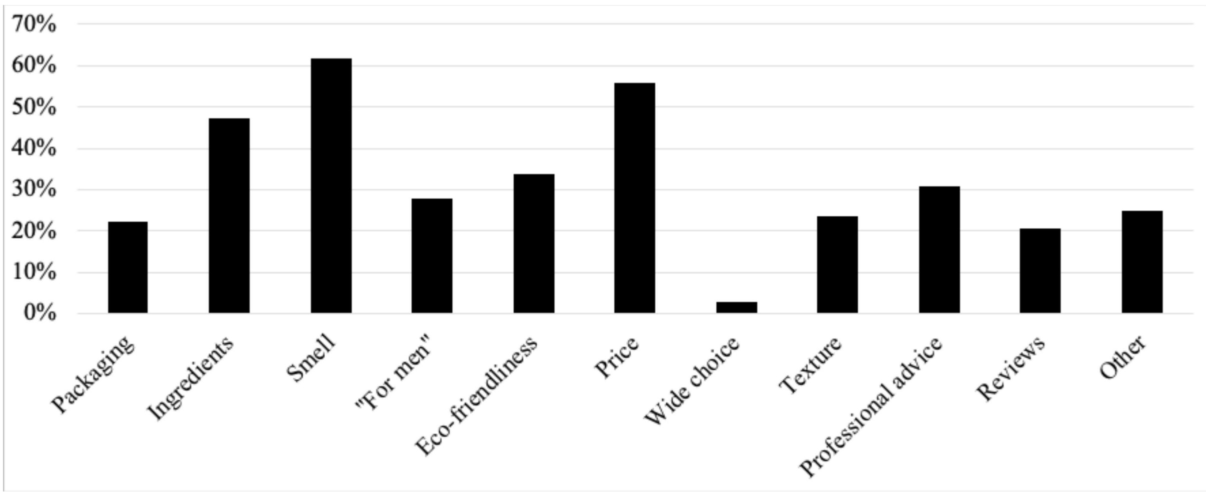


Figure 3: Most important attributes when buying a cosmetics product

4.2.1. Demographics

In order to understand the impact of demographics on the cosmetics purchase, a series of independent samples t-tests were conducted using the data extracted from the crosstab (appendix 1). There is a non-significant difference between the age of the respondents who buy or do not buy products in a given category ($t(5) = 2.481$, $p = .056$), showing that people who buy products are 3,63 years younger ($M = 29.07$, $SD = 3.09$) than the one who do not ($M =$

32.7, SD = 3.58). There is however a significant difference of 455 € ($t(5) = -5.009$, $p = .004$) between the wages of respondents who buy (M = 2478.17, SD = 271.31) and those who do not buy products in a given category (M = 2023.17, SD = 222.50), confirming that men who earn more money consume more cosmetics. Indeed, even though not significant ($t(5) = -1.280$, $p = .257$), the ratio of men from superior socio-professional categories buying products from a given category (M = .5964, SD = .318) is superior to the one of other socio-professional categories (M = .4420, SD = .2954). The marital status has shown no impact on whether a man buys more cosmetics ($t(5) = .000$, $p = 1.000$). Finally, there are not enough respondents coming from non urban areas to consider this demographic variable. These findings confirm the hypothesis 1a, 1c, 1d according to which men who earn more money, are younger and in superior socio professional categories are more likely to buy more cosmetics.

To test the influence of the marital status on the extent to which a man buys its cosmetics products himself, an independent samples t-test was conducted. Levene's test for equality of variances indicated that the variance between the two groups (single vs. not single) was equal ($F = 3.894$, $p = .053$). Levene's test being non significant, a t-test that presupposes equality of variances was used. This test showed that there was a non significant difference between the two experimental conditions ($t(66) = .830$, $p = .409$). Specifically, participants who are single tend to buy their cosmetics products themselves (M = 4.32, SD = .727) more than the ones in a relationship (M = 4.12, SD = 1.250). These results allow to confirm hypothesis 1f, according to which the individuals who are in a relationship are less likely to buy their cosmetics themselves.

4.2.2. Culture

Now that the impact of demographics variables on consumers behavior was measured, the same should be done with the cultural variables, which are the level of uncertainty avoidance (UAI) and the masculinity index (MAS). Since each of these cultural indexes were measured using several questions, we want to check whether the several variables can be summed up to create a single variable. Questions for UAI correlated significantly ($p < .01$) as well as the ones for MAS ($p < .05$). In order to check whether they could be summed up, a reliability check was made to measure Cronbach's Alpha. Reliability analysis on the five questions measuring UAI showed that all questions together had a $\alpha = .815$. Reliability analysis on the four questions measuring MAS showed that all questions together had a $\alpha = .705$. Since both Cronbach's alpha are above the .6 threshold, the questions were recoded into two variables.

In order to understand the impact of cultural specificities on the cosmetics purchase, a series of independent samples t-tests were conducted using the data extracted from the crosstab (appendix 2). There is a non-significant difference between the level of uncertainty avoidance of the respondents who buy or do not buy products in a given category ($t(5) = -1.151$, $p = .302$), showing that people who buy products are less reluctant to uncertainty ($M = 3.09$, $SD = .3653$) than the one who do not ($M = 3.26$, $SD = .1077$). There is a non-significant difference between the level of masculinity of the respondents who buy or do not buy products in a given category ($t(5) = 2.163$, $p = .083$), showing that people who buy products have a higher masculinity index ($M = 2.135$, $SD = .252$) than the one who do not ($M = 1.9117$, $SD = .168$). These results allow to confirm hypothesis 1g, according to which men who score high on uncertainty avoidance are less likely to buy cosmetics. However, the hypothesis 1h according to which men who score high on masculinity are less likely to buy cosmetics, is rejected.

4.3. Clean Beauty

4.3.1. Likeliness to buy

When asked on a scale from one (not at all) to five (totally) how likely they would be to buy clean beauty cosmetics, the respondents of this study answered on average $M = 3.43$, $SD = 1.331$. In order to analyze whether or not the wage, appartenance to a superior socio-professional category, age, marital status, masculinity level and uncertainty avoidance impact the likeliness to buy clean beauty, a regression analysis was performed. The regression analysis was significant, $R^2 = .206$, $F(6) = 2.636$, $p = .024$. The result presented in the table below show that age and wage have no impact on the likeliness to buy clean beauty, however belonging to a superior socio-professional category and being in a relationship positively impact the dependent variable. The lower the masculinity score and the higher the uncertainty avoidance score, the higher the likeliness to buy clean beauty. The results confirm hypothesis 2c, 2e and 2g.

	Unst. Coefficients		St. Coefficients	t	p	F	R2	ΔR2
	B	SE	β					
						2.636*	.206	.128
(Constant)	3.134	.899		3,488	.001			
Age	.000	.014	-.004	-.028	.978			
CSP+	.531	.410	.190	1.296	.200			
Wage	.000	.000	-.102	-.567	.573			
Single	-.123	.362	-.046	-.339	.736			
UAI	.411*	.190	.277	2.16	.035			
MAS	-.558**	.190	-.364	-2,94	.005			

**: sig. < .05 ; ** : sig. < .01*

Figure 4: Regression results on likeliness to buy clean beauty cosmetics

4.3.2. Willingness to spend more

On a scale from 1 (not at all) to 5 (totally), to say if they would be willing to pay more for clean beauty cosmetics, respondents' answers have a mean M = 3.88, SD = .907. Half of them responded 4 or above.

4.3.3. Categories and buying places

The two histograms below show what categories of clean beauty cosmetics they would buy, and where. This shows that the most attractive clean beauty categories are functional skincare, haircare and deodorant, and would mostly be bought in drugstores and supermarkets.

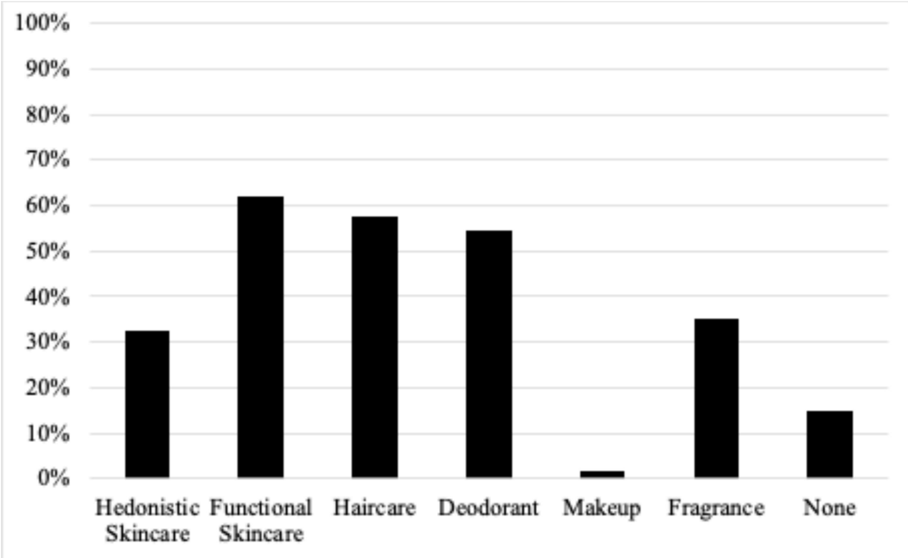


Figure 5: Clean beauty categories that would be consumed.

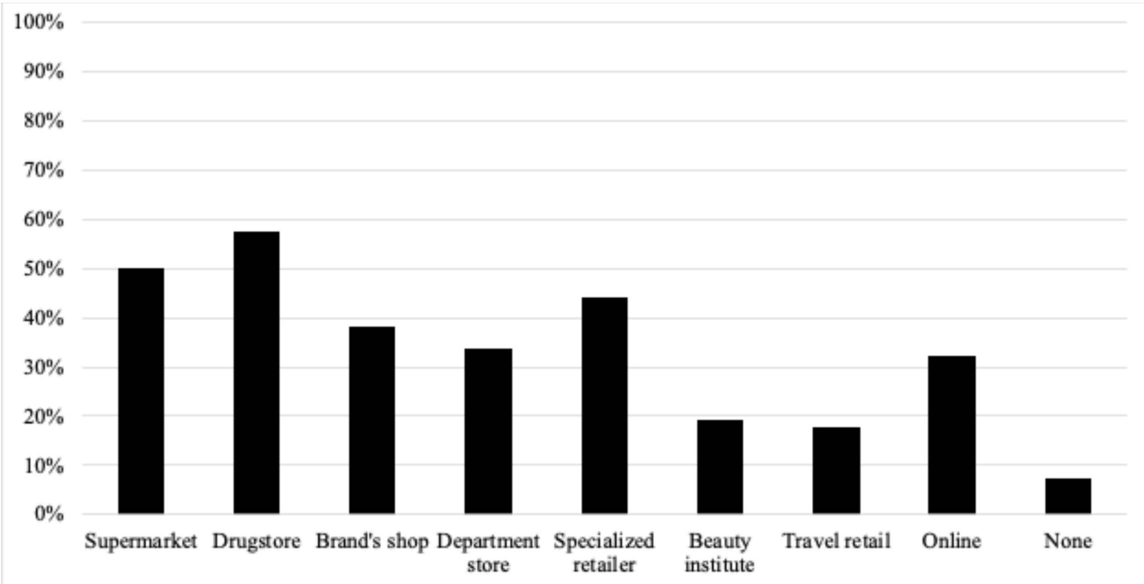


Figure 6: Places where respondents would buy clean beauty products.

4.4. Body Friendly

4.4.1. Likeliness to buy

When asked on a scale from one (not at all) to five (totally) how likely they would be to buy body friendly cosmetics, the respondents of this study answered on average M = 3.57, SD = 1.353. In order to analyze whether or not the wage, appartenance to a superior socio-professional category, age, marital status, masculinity level and uncertainty avoidance impact the likeliness to buy body friendly products, a regression analysis was performed. The regression analysis was significant, $R^2 = .547.$, $F(6) = 4.335$, $p = .001$. The result presented in the table below shows that wage have no impact on the likelihood to buy body friendly cosmetics, however belonging to a superior socio-professional category and being in a relationship positively impact the dependent variable. The lower the age, the masculinity score and the uncertainty avoidance score, the higher the likeliness to buy body friendly. The results confirm hypothesis 3a, 3c, 3e, 3f and 3g.

	Unst. Coefficients		St. Coefficients	t	p	F	R2	ΔR2
	B	SE	β					
						4.335**	.547	.299
(Constant)	4.702**	.858		5.478	.000			
Age	-.044**	.013	-.482	-3.281	.002			
CSP+	.497	.391	.175	1.271	.209			
Wage	.000	.000	.281	1.660	.102			
Single	-.501	.345	-.186	-1.450	.152			
UAI	-.095	.182	-.063	-.522	.604			
MAS	-.069	.181	-.044	-.380	.705			

**: sig. < .05 ; ** : sig. < .01*

Figure 7: Regression results on likeliness to buy body friendly cosmetics

4.4.2. Willingness to spend more

On a scale from 1 (not at all) to 5 (totally), to say if they would be willing to pay more for body friendly cosmetics, respondents' answers have a mean M = 3.940, SD = 1.035. Half of them responded 4 or above.

4.4.3. Categories and buying places

The two histograms below show what categories of body friendly cosmetics they would buy, and where. This shows that the most attractive body friendly categories are functional skincare, haircare and deodorant, and would mostly be bought in drugstores and specialized retailers.

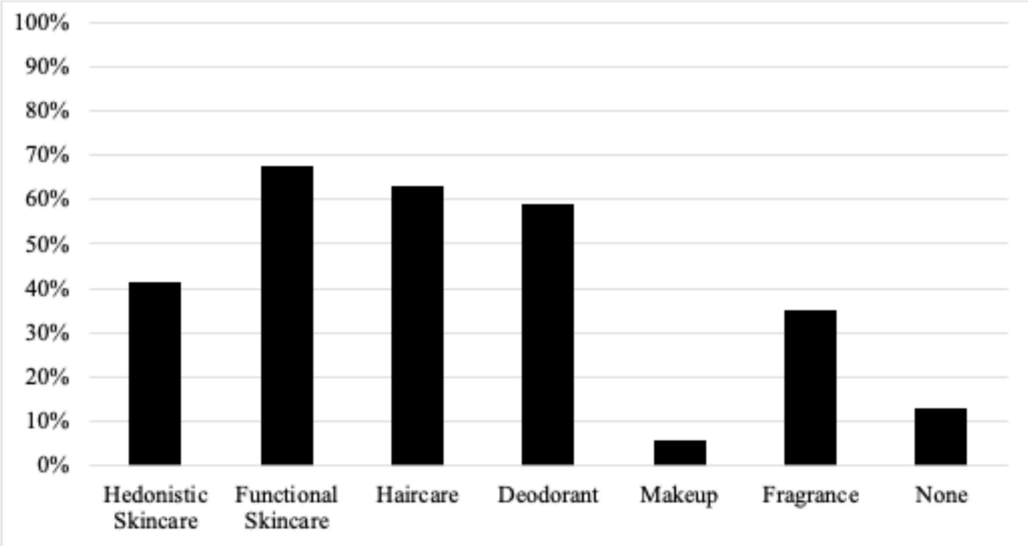


Figure 8: Body friendly cosmetics categories that would be consumed.

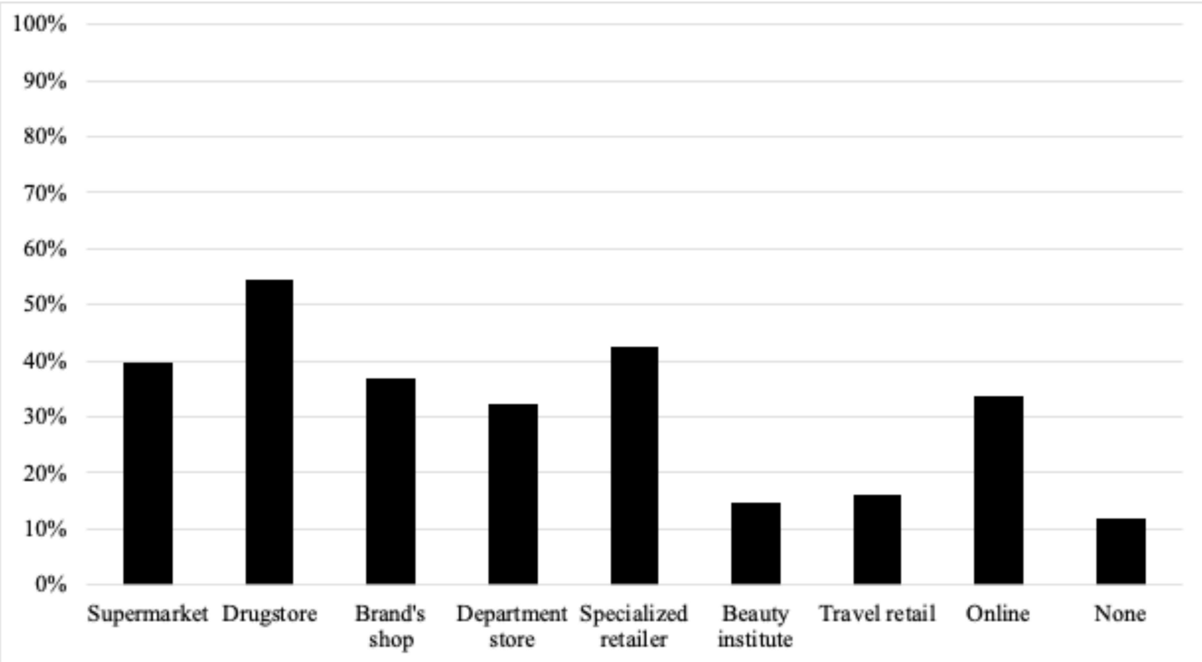


Figure 9: Places where respondents would buy body friendly products.

4.5. Unisex cosmetics

4.5.1. Likeliness to buy

When asked on a scale from one (not at all) to five (totally) how likely they would be to buy clean beauty cosmetics, the respondents of this study answered on average M = 3.41, SD = 1.249. In order to analyze whether or not the wage, appartenance to a superior socio-professional category, age, marital status, masculinity level and uncertainty avoidance impact the likeliness to buy unisex products, a regression analysis was performed. The regression analysis was not significant, $R^2 = .103.$, $F(6) = 1.161$, $p = .339$. The result presented in the table below shows that only age has a significant impact on the dependent variable. Therefore, the higher the age, the less likely one is to buy unisex cosmetics. The results confirm hypothesis 4a.

	Unst. Coefficients		St. Coefficients	t	p	F	R2	ΔR2
	B	SE	β					
						1.161	.103	.014
(Constant)	4.087**	.896		4.559	.000			
Age	-.033*	.014	-.388	-2.336	.023			
CSP+	-.024	.409	-.009	-.059	.953			
Wage	.000	.000	.180	.940	.351			
Single	-.113	.361	-.046	-.314	.754			
UAI	.090	.190	.065	.474	.637			
MAS	-.118	.190	-.082	-.624	.535			

**: sig. < .05 ; ** : sig. < .01*

Figure 10 : Regression results on likeliness to buy unisex cosmetics

4.5.2. Willingness to spend more

On a scale from 1 (not at all) to 5 (totally), to say if they would be willing to pay more for unisex cosmetics, respondents' answers have a mean M = 2.37, SD = 1.424. Half of them responded 2 or above.

4.5.3. Categories and buying places

The two histograms below show what categories of unisex cosmetics they would buy, and where. This shows that the most attractive unisex categories are functional skincare, haircare and deodorant, and would mostly be bought in supermarkets or drugstores.

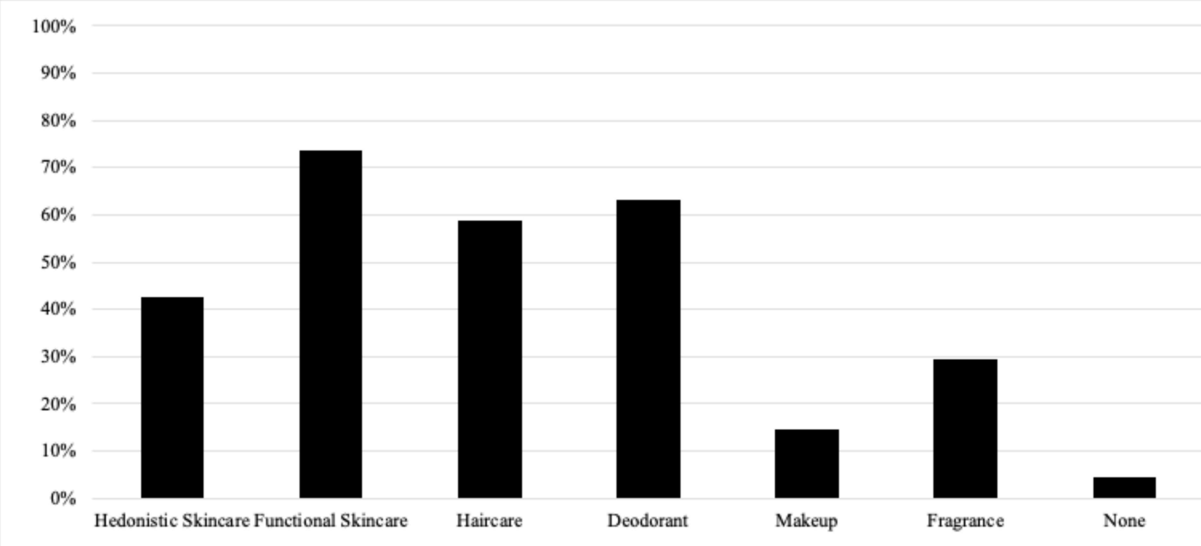


Figure 11: Unisex cosmetics categories that would be consumed.

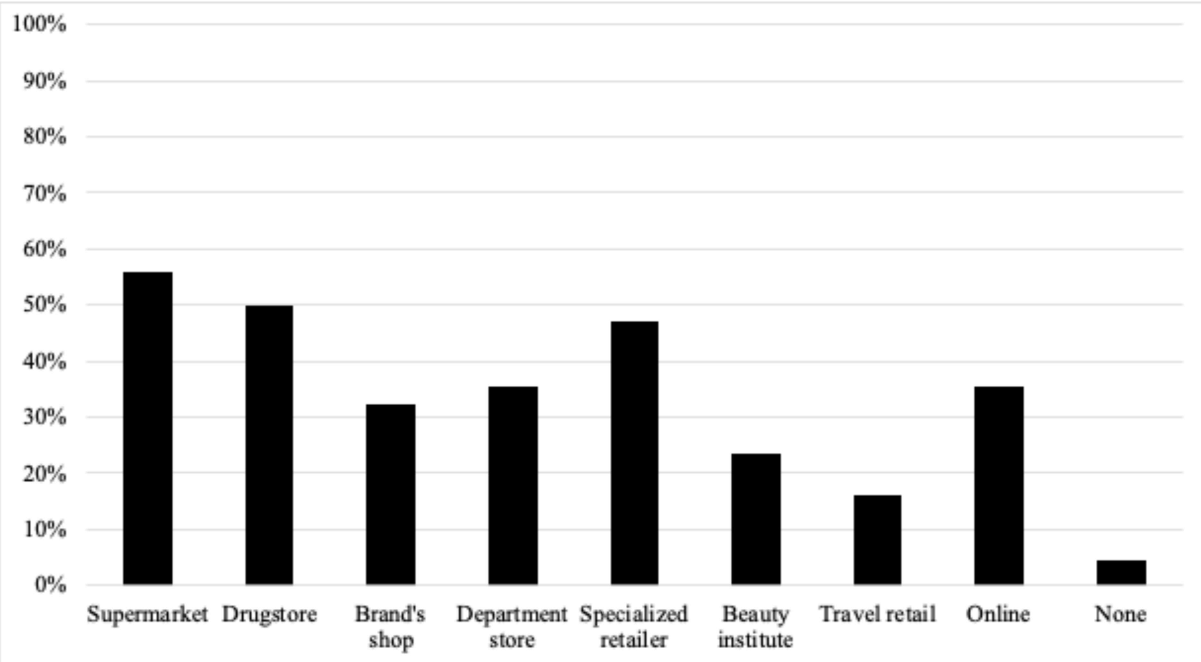


Figure 12: Places where respondents would buy unisex products.

4.6. Cosmetics Routine

4.6.1. Likeliness to buy

When asked on a scale from one (not at all) to five (totally) how likely they would be to buy clean beauty cosmetics, the respondents of this study answered on average M = 2.96, SD = 1.429. In order to analyze whether or not the wage, appartenance to a superior socio-professional category, age, marital status, masculinity level and uncertainty avoidance impact the likeliness to buy cosmetics routines, a regression analysis was performed. The regression analysis was not significant, $R^2 = .081.$, $F(6) = .894$, $p = .505$. Even though no variable shows a significant impact on the dependent variable, the most significant impact is the one of the socio-professional category. Indeed, appartenance to a superior socio-professional category positively impacts the likeliness to buy cosmetics routines. The results do not allow to confirm any hypothesis.

	Unst. Coefficients		St. Coefficients	t	p	F	R2	ΔR2
	B	SE	β					
						.894	.081	.010
(Constant)	.837	1.038		.806	.423			
Age	.013	.016	.137	.816	.418			
Wage	.000	.000	-.067	-.344	.732			
CSP+	.793	.473	.264	1.674	.099			
Single	.328	.418	.115	.784	.436			
UAI	.269	.220	.169	1.221	.227			
MAS	.153	.220	.093	.698	.488			

**: sig. < .05 ; ** : sig. < .01*

Figure 13 : Regression results on likeliness to buy cosmetics routines

4.6.2. Willingness to spend more

On a scale from 1 (not at all) to 5 (totally), to say if they would be willing to pay more for routine cosmetics, respondents' answers have a mean M = 2.69, SD = 1.363. Half of them responded 3 or above.

4.6.3. Categories and buying places

The two histograms below show what categories of routine cosmetics they would buy, and where. This shows that the most attractive routine categories are functional skincare and haircare and would mostly be bought in supermarkets, specialized retailer and drugstores.

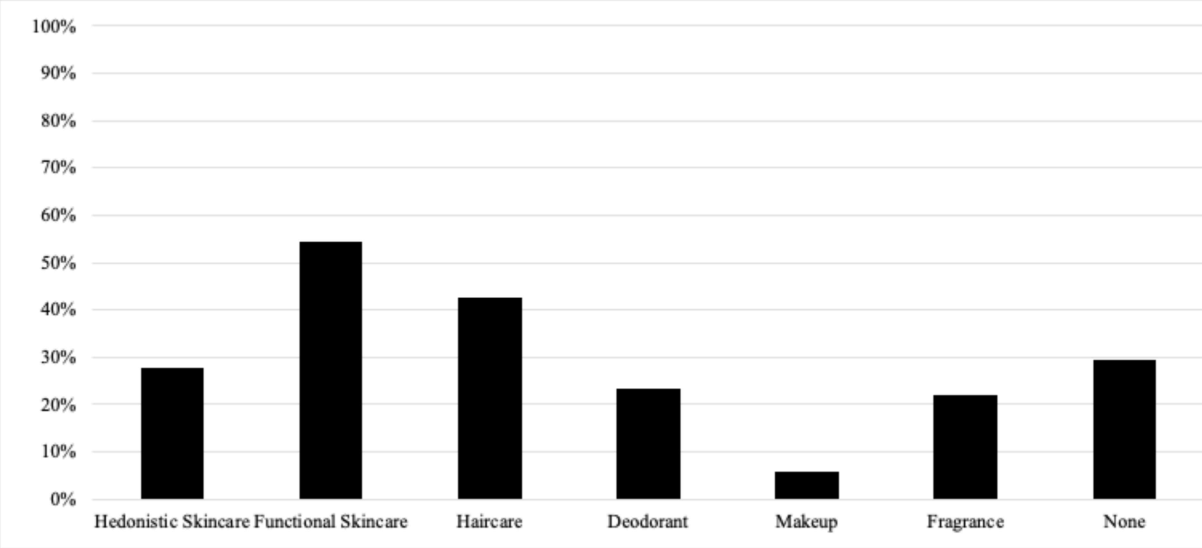


Figure 14: Cosmetics routines categories that would be consumed.

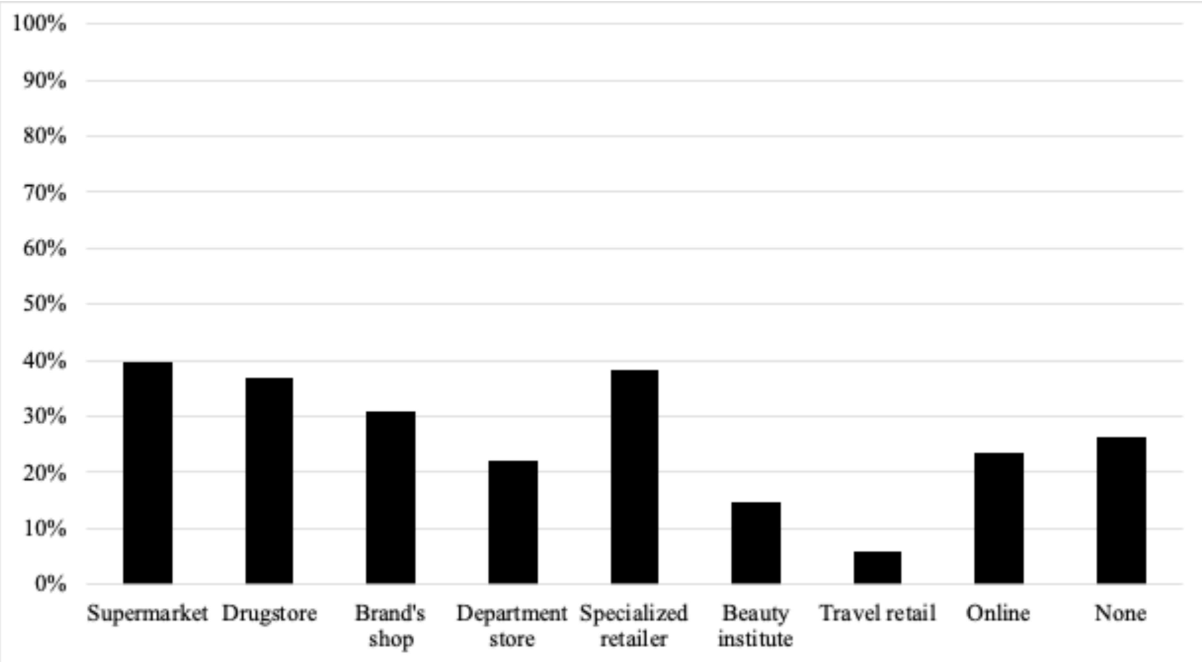


Figure 15: Places where respondents would buy products routines.

5. Conclusion and recommendations

In this last part, the main findings of this study will be presented, with the implication they represent for marketers of cosmetics brands and retailers. In addition, some limitations of the research will be identified as well as recommendations for future research on the topic.

5.1. Main conclusions and recommendations

The first part of the research aimed at understanding how and what men consume when it comes to cosmetics products, to verify what previous researches suggested. According to the literature review and interviews that were conducted, young men living in urban areas, who are either married or in a relationship and part of superior socio-professional categories are expected to be the ones consuming the most cosmetics, representing a small potential market for brands and distributors. According to this study, only wage has a significant impact on cosmetics consumption : the higher the wage, the more likely one is to buy cosmetics products. This implies cosmetics are not considered a basic need, but more as an esteem need such as luxury products. Other non significant indicators confirm that younger men who are in superior socio-professional categories will consume more than the others. Brands already reach the very small market of wealthy young urban men, but if they want to expand the market, they need to bet on a more accessible communication pricing to reach more categories of men.

If previous research indicates that single men consume less cosmetics, this research showed they however are more likely to buy their products themselves. From this latter point, as well as what was mentioned by Kim Mazzilli, can be concluded that men living with a woman are generally more educated in terms of cosmetics use, but they are not buying their own products : they either get them bought by their wife/girlfriend, or use the ones of their wife/girlfriend. This shows that brands and retailers should emphasize the educational aspect when promoting products. Brands for men only, such as Horace, believe it is important to offer a limited range of products so the clients won't get lost and make a quick and easy choice. This finding also implies that there is a need to make male consumers more comfortable to spend time on selecting and buying their products. Indeed, in the population interviewed for this research, supermarkets are by far the preferred place to buy cosmetics products, because it is quick and easy to access. There might be a need for a retailer based on the Sephora model, but for men exclusively, to comfort them on their cosmetics consumption. This could also make male consumers discover new categories of skincare : indeed, across this research, the functional skincare, haircare and deodorant categories were always the dominantly preferred categories. Hedonistic skincare and makeup are left aside. There is a huge age and wage gap between men consuming makeup and those who do not for instance (appendix 1). This is another proof that the category of wealthier and younger men are already successfully reached by brand, so there is now a need to focus on making hedonistic cosmetics more attractive and accessible.

Now that current male cosmetics consumption is understood, it is interesting to see how they would behave in front of new trends on the market. Among the ones presented in this study, body friendly cosmetics were the most attractive products, followed closely by clean beauty and unisex cosmetics. Regarding cosmetics routine, it has been found that only the belonging to a superior socio-professional category seemed to have an impact on the respondents interest. Indeed routine implies using several products, spending more money and time on it. It is more of a prestigious ritual than a functional habit, therefore more of an esteem need than a physiological need. Respondents indicated that it is moderately justified to pay more for a product that is part of a routine. Therefore, brands and retailers who want to address more prestigious clients should offer premium products routines, and the same way if offering routine products, they should be premium to address the right category of consumers. They should be focusing on functional skincare, for instance grooming routines with a shaving foam and an aftershave, as well as haircare, with for instance a shampoo with a conditioner. However, that is the trend in which the most respondents would be the most reluctant to buy any product, indeed 29% of them would not consider routines at all.

Body friendly skincare was measured to be the most attractive cosmetics trend among all four. As expected, it is more likely consumed by young men, in superior socio-professional categories, who are in a relationship and who score low on masculinity and uncertainty avoidance. Respondents are willing to pay more for body friendly products, most likely because it implies using more responsible ingredients and formulations. They should be distributed in drugstores, where respondents expect to find them, because drugstores are perceived as a guarantee of quality. Men would consume the same cosmetics categories as they do already, namely functional skincare, deodorant and haircare. Brands and retailers should focus their offer on body friendly cosmetics in these three categories, addressing their younger clients who are more sensitive to this kind of concern.

Clean beauty consumers are more likely to be part of superior socio-professional categories and in a relationship, however age and wage do not impact the consumption on this trend. Respondents who score high on masculinity are less likely to consume it, however people scoring high on uncertainty avoidance tend to be more interested in clean beauty. This could be explained by the transparency of the production process that is a basis of clean beauty, which reassures consumers on the origins and fabrication. Respondents found justified to pay more for these cosmetics products, and would rather by them in drugstores as well as in supermarkets. They would most likely buy functional skincare, deodorant and haircare.

Finally, the only factor impacting the likeliness to buy unisex cosmetics is the age of the consumer. This is due to the evolution of the concept of masculinity, that is slowly disappearing with time. Brands should therefore target their youngest customers if selling unisex products. Among all four trends introduced to the respondents, this one is the one for which they are the least willing to spend more than on conventional products, therefore the pricing should be similar to products branded"for men". They would mostly buy it in supermarkets and drugstores, and concentrate on functional skincare, deodorant and haircare. However an interesting figure is, among all four categories, unisex comsetics is the one in which respondents would be the more likely to buy makeup (15% of them). Only 4% are reluctant to buy unisex at all.

Overall, comparing the results of the current cosmetics consumption and the cosmetics trends, men would always stick to the same categories of products, and would not change the place they buy it. Therefore a conclusion from this study is that if the market is remaining very small in spite of its constant growth over the past few years, it is not ready to be disrupted either. A recommendation would be, as it starts being done already, for brands and retailers to keep promoting the positive impacts of the products and to keep on educating male consumers. There is a need for a "safe place" to buy cosmetics and discover. According to Di Gesu's report about men's grooming (2018), 50% of the men find it hard to know which ingredients they should look for when buying a product, 71% agree on the fact that the products should be easy to use and 44% state that products features need to be easy to understand.

5.2. Limitations and future research

Despite extensive preparation to conduct this study as accurately as possible, the conducted research comprises several shortcomings, emerging from the sample studied and the measurement methods used, that future research can consider when exploring this topic. First, the data used to realize the study was conducted over a time frame of only five days, in combination with the sample size of 68 respondents, allowing implications of marginal significance. Furthermore, the convenient snowball sampling method implies that most respondents come from a similar background. Indeed in this case there were not enough non-urban respondents to consider this variable, even though it was an essential assumption to understand the profile of men consuming cosmetics. What is more, the superior socio-professional categories were over represented.

Also, almost all respondents are French. It would be interesting to conduct the same study using a wider and more representative sample of population, and from more various nationalities. Indeed, men from different regions do not consume the same way at all, because of cultural differences as well as needs. For instance, in Asia, more than half of the men suffer from enlarged pores and acne due to climate conditions. In Europe and the Middle East, a beard is much more acceptable than anywhere else. For these reasons it would have been interesting either to have representative groups of respondents from all continents, or to focus the research on one region only.

Another shortcoming, due to the lack of education when it comes to cosmetics, is the fact that despite the definition provided, it is highly likely that the respondents did not provide answers reflecting the truth when it comes to their cosmetics consumption. Indeed, only 65% of the respondents claim to buy functional cosmetics, however they include daily products such as shower gel. What is more, almost all of them, even the ones stating they would not be interested in buying some, are probably already using unisex products, such as toothpaste or shampoo for instance. It would have probably been easier to focus the study on one category of cosmetics only and describe the products.

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7. APPENDIX

			Cos_SkincareHedonistic		Cos_SkincareFunctional		Cos_Haircare		Cos_Deodorant		Cos_Makeup		Cos_Fragrance	
			No	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No	Yes
AGE	Mean		31,4	29,6	31,5	30,5	28,8	32,0	39,2	29,1	31,3	23,1	34,0	30,1
CSPplus	No	Count	21	2	8	15	10	13	7	16	22	1	9	14
	Yes	Count	27	18	16	29	15	30	5	40	42	3	4	41
WAGE	Mean		2146	2500	2292	2227	1940	2430	1750	2357	2203	3000	1808	2355
URBAN	No	Count	2	1	1	2	1	2	1	2	3	0	0	3
	Yes	Count	46	19	23	42	24	41	11	54	61	4	13	52
Status_Single	No	Count	26	8	11	23	11	23	6	28	33	1	6	28
	Yes	Count	22	12	13	21	14	20	6	28	31	3	7	27

Appendix 1: Crosstabs between demographics and currently consumed cosmetics categories.

		Cos_Skincare Hedonistic	Cos_Skincare Functional	Cos_Haircare	Cos_Deodora nt	Cos_Makeup	Cos_Fragranc e
UAI	No	3,22	3,31	3,06	3,33	3,29	3,35
	Yes	3,25	3,19	3,33	3,21	2,35	3,20
MAS	No	1,84	2,15	1,72	1,77	1,93	2,06
	Yes	2,29	1,88	2,12	2,01	2,56	1,95

Appendix 2: Crosstabs between cultural variables and currently consumed cosmetics categories.