INSTITUTO
UNIVERSITÁRIO
DE LISBOA

Cosmetic Industry: Changes in the Consumer Behavior and COVID-19 Impact

Joana Paisana Morais

Master in,
Marketing

Supervisor:
Susana Henriques Marques
Associate Professor, Marketing, Operations and General Management Department
ISCTE Business School

October 2022

Cosmetic Industry: Changes in the Consumer Behavior and COVID-19 Impact

Joana Paisana Morais

Master in,
Marketing

Supervisor:
Susana Henriques Marques
Associate Professor, Marketing, Operations and General Management Department
ISCTE Business School

October 2022

Abstract

With the emergence of the COVID-19 pandemic, the growing concern about all environmental problems and successively an increasingly significant evolution of the digital world, it became evident that consumer behaviour also observed a change. Since the cosmetics industry, too, was one of the most affected by all these changes, it was for this reason the main market of study for this thesis. In this way, variables such as sustainability, e-commerce, pandemic, cruelty-free, globalization and some others were analysed.

The investigation objective of this research went through the analysis of the answers of 105 consumers and the careful reading and reflection of the answers given by four professionals from the cosmetic area to the interviews that were carried out.

The results obtained allowed us to conclude that Covid-19 and E-commerce had an impact on the way the consumer started to act. In other words, there were many more people who started to buy products online, especially when it is a re-purchase and, on the other hand, the pandemic caused changes in the cosmetic categories, such as Make-up being left in the background and the skin care category to become much more important. Despite, Sustainability and Cruelty-Free did not have any kind of impact on the consumer behaviour, although there is a greater awareness from the consumer for more environmentally friendly products, we realize that at the actual time of purchase, the cheapest product is still chosen over the most sustainable one.

Key-words: cosmetics; sustainability; e-commerce; Covid-19 pandemic; consumer behaviour; digitalization

JEL Classification System: Marketing (M31); Social Responsibility (M14)

Resumo

Com o aparecimento da pandemia COVID-19, a crescente preocupação com todos os problemas ambientais e sucessivamente uma evolução cada vez mais significativa do mundo digital tornou-se evidente que também o comportamento do consumidor observou uma mudança. Sendo a indústria cosmética, também ela, uma das mais afetadas por todas estas alterações foi o principal mercado de estudo para esta tese. Desta forma, foram analisadas váriaveis como a sustentabilidade, e-commerce, pandemia, cruelty-free e globalização.

O objetivo de investigação desta pesquisa passou pela análise das respostas de 105 consumidores e pela atenta leitura e refleção das respostas dadas por parte de quatro profissionais da área cosmética às entrevistas que foram realizadas.

Os resultados obtidos permitiram concluir que a Covid-19 e o e-commerce tiveram impacto no que diz respeito à forma como o consumidor passou atuar. Ou seja, houve muito mais pessoas que passaram a comprar produtos online principalmente quando é uma re-compra e por outro lado a pandemia fez com que categorias como a maquilhagem fossem deixadas para segundo plano e que a categoria de skin care se torna-se cada vez mais importante. Já a sustentabilidade e a Cruelty-Free não tiveram qualquer tipo de impacto no comportamento do consumidor. Apesar de haver uma maior conciencialização por parte do consumidor por produtos mais amigos do ambiente, percebemos que na hora real da compra, ainda é escolhido o produto mais barato em detrimento do mais sustentável.

Palavras-chave: cosmética; sustantabilidade; e-commerce; Covid-19 pandemic*;* comportamento do consumidor; digitalização

JEL Sistema de Classificação: Marketing (M31); Social Responsibility (M14)

Acknowledgments

This dissertation is the result of a long year of effort and work. In the begging I just did a lot of investigation to try to get as much information and consistent as possible, later I was able to put my analytical skills more on practise with the information I have obtained. The topic that I have chosen as emerged when I started working in the last year in a pharmaceutical company, more precisely in the dermocosmetic field, I felt passionate about the cosmetic area and thought that the thesis would be a great chance to get to understand more about this market that now i love so much and that it’s much more complex then what I though in the begininig.

So, first, I would like to thank my supervisor, Susana Henriques Marques, for all the support, advice, and analyse and for having agreed to be part of this journey with me from the very beginning.

Secondly, to all my family, boyfriend and friends who always motivated me even when I felt I was at my lowest, they have always pushed me to do better and never give up.

Finally, to all the people who made this thesis possible, as in this case, to the 4 professionals interviewed who gave their testimony without any fear and always available for any doubts.

Lastly, to all the people who answered my questionnaire and made the analysis of the data even richer and more consistent.

Thank you all.

INDEX

Introduction

1.1 Research Question, Context, and Limitations of the Problem of the Study

The starting point of any thesis, as everyone knows, is the question of research, from which it is decided what it is intended to look for. In this case, this thesis will have, not one but two starting questions, which are automatically correlated. They are:

a. Which are the factors that influenced a change in the way of consumption in the cosmetic industry?
b. How has the Covid-19 pandemic had an impact on those changes?

The context in which these questions arise is partly related to a pre and post-pandemic situation. About two years ago, the world changed and with it, the needs, and forms of consumption of each one of us. The cosmetics industry was also not immune, and this phenomenon is going to be studied. This is a market that has undergone major changes in recent years and that is not always exploited, but is present in the lives of almost everyone, either on our face, body, hair, etc... Therefore, it is relevant to understand what has happened and how brands that are part of this industry may have to adapt and respond in the best way possible to consumers in the future. The cosmetic market is very large, with different subcategories inside it, which is a limitation when studied, but, on the other hand, a challenge that in the short future can become an asset. In addition, as the desired addressed topic is also related to the pandemic, there is still not much relevant literature on it, which may also be an obstacle.

1.2 Thesis Objectives

To develop any thesis, it is necessary to have something that moves us to do it, some goal that is intended to be achieved. Somehow at the end of it all, the idea is to have more answers than the ones we originally started with.

Firstly, in this thesis there are to main steps: **to identify and to define** the answers to our starting questions, by realizing what are the reasons that led to a change in the way people see and consume in the cosmetic industry, and to understand how the pandemic is (or not) one of the reasons for it and how it impacted (or not) the sector.

Secondly, it's time to **interpret and determine.** Along the process, there will certainly be a lot of information and misinformation as well, and it is necessary to understand what is relevant and what is just “additional” information. Not everything determines the way consumption happen, that is why this phase is mandatory to have the best results.

Thirdly, to **analyze**, it is necessary to carry out a more thorough investigation into what were the reasons chosen and the factors that led to a change, to perceive their veracity and consistency in the different sources of information.

Finally, to **compare and to propose**, by perceiving what has been defined in other thesis as the truth, and to propose future solutions to these same answers, to be able to offer the tools to those who will have the opportunity to cross their eyes in this paper and feel completely clear with what they are reading.

Literature review

This literature review will be divided into two main parts: **consumer behavior** and **cosmetics.** In this first topic, we will pass through what is consumer behavior and the factors that influence it, after understanding consumer decision-making and type of purchase, and last try to relate all of this with the COVID-19 pandemic.

On the second topic, we will do an overview of what is the current situation of the cosmetic industry in the world and more deeply in Portugal. Finally, try to connect these two parts by understanding the factors that influenced a change in consumer behavior in the cosmetic market.

Consumer Behavior

We can define consumer behavior as "All product market-related activities, thoughts, and effects occurring before, during and after the purchase of the product as performed by buyers and consumers of products and services and by those affecting the market" (Diamantopoulos, F. N.,2020). The consumer behavior it’s also connected to how people feel mentally, emotionally, and what are their action following these purchases. It’s clear to say that what we believe, what we like, how we feel will for sure have an impact in our behavior, as well as the environment where the purchase is taking place.

Consumer behavior” is summary of external manifestations, actions, and reactions of an individual. Based on an understanding of consumer behavior, companies can then create their marketing offer and implement them” (Veselovská et al., 2021).

Consumer behaviour like any human behaviour is largely individual and mostly hidden. It is influenced by a number of factors that are not directly measurable, so they affect behaviour only in the mind of the consumer (Veselovská et al., 2021).

1. Consumer Decision Making

Consumers exhibit different patterns in their decision-making based on their characteristics (Bhatnagar & Ghose, 2004). Purchase processes are influenced by consumers' decision-making style and knowledge of the product (Karimi et al., 2015). These individual characteristics define the motivation and capabilities of consumers (Heitmann et al., 2007) and can therefore explain differences in decision behavior (Karimi et al., 2018).

If we think about the decision-making process, it’s also important to talk about the definition of consumer satisfaction. Satisfaction is defined as a function of consumer expectations and the extent to which these expectations are met (LaBarbera & Mazursky, 1983). It is a consequence of the experiences during all steps of the purchase process (McKinney et al., 2002). It’s important that at the end of the process, the consumer can achieve a good level of satisfaction and feel happy and that his expectations were achieved.

The times changed and one of the main platforms that consumer use to do their purchase and buy something is online. Nowadays, and even more with the COVID-19 pandemic, people prefer the comfort of having a product just one click away.

However, “the availability of large amounts of online information makes the consumer purchase decision-making process a laborious and frustrating task” (Karimi et al cit. Hölscher & Strube).

Consumer online purchase decision-making is a dynamic process that comprises different stages. The traditional model of the purchase decision-making process, according to Karimi (2018), includes five stages: problem recognition, information search, evaluation of alternatives, purchase decision, and post-purchase behavior (Fig. 1).

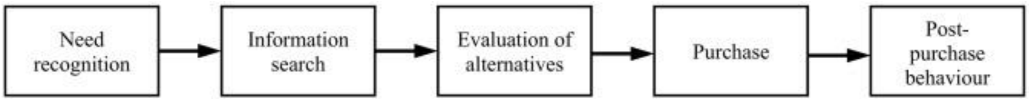


Figure A - Stages of the online purchase decision-making process.

Understanding how online consumers construct the purchase decision-making process is crucial to marketers “the consumer can choose to exit the path to purchase at any given time” (Srinivasan et al., 2016).

On the other hand, consumers' knowledge of products is an individual characteristic that has been shown to influence the purchase process.

According to the consumer decision-making literature, a purchase decision is the behavioral pattern of a consumer who determines and follows a decision process comprising various stages in order to reach a choice (Karimi et al., 2015).

2. Type of Purchase

Every consumer is different and the way we plan our purchase is not the same. We often have in mind to buy something, and we think a lot about it, consider the pros and cons, and if it makes sense to move forward with action. It is something outlined – a rational purchase.

However, this is not always the case, for the most part, we are quite impulsive and do not think about what we are going to buy, making impulsive purchases.

An impulsive purchase is a purchase made without planning or sufficient reflection after being exposed to certain stimuli (Beatty & Ferrell 1998). A report shows that 68 percent of online purchases are made on impulse (Hu et., 2019).

An impulsive purchase is a type of purchase that is made with no pre-existing intention. It tends to be spontaneous and made without significant reflection when triggered by some external stimuli. At first glance, impulse buying seems to be a negative concept that may be associated with defects in one's characteristics such as low self-control, weak self-discipline, and immaturity. However, some researchers have stated that an impulsive purchase is a common shopping practice that may lead to hedonic and pleasant consequences (Hu et., 2019).

However, impulsive purchase still involves cognitive deliberation and logical decision-making, since affective feelings alone cannot lead to the making of a purchase decision (Hu et., 2019).

On the other side, rational thinking tends to be cognitive-based, logical, hierarchical, sequential, conscious, effortful, and process-oriented.

Consumers with utilitarian motives are more likely to engage in rational thinking than those with hedonic motives and vice versa (Li et al., 2014).

When making rational purchases, consumers are likely to engage in logical analysis and reasoning. They may use a cognitive country image as a summary attribute to form general perceptions of products from that country (Li et al., 2014).

3. New Trends in the Consumer Behavior

In marketing, to be able to respond in the best way possible and be always one step ahead of the competition is relevant to know what the main **trends** in the consumer field are. This information can help to construct strategies and attract new customers easily.

But, of course, this is continuous work that needs to be done frequently, because the factors that influence consumer behavior are constantly changing, whether the circumstances, recent events, fashions, social and cultural change, etc...

The definition of a **trend** elaborated by Nikodemska-Wołowik (2019) refers to a process of change that begins with trendsetters and moves into the mainstream, eventually, this change may fall out of favor. Trends occur and change more quickly now (no more than a couple of years) compared to the past when it was common for several decades to pass before any major changes were noticed. The prevalence of trends means that marketing trends belong to a sphere of knowledge that needs to be constantly updated (Nikodemska-Wołowik cit. Petrů et al., 2018). A trend is set simultaneously by two forces: (a) identifying customers' needs and trying to satisfy them and (b) shaping the needs and demands of potential buyers (Nikodemska-Wołowik et al., 2019).

After the 2008 financial crisis we have identified five new trends: (1) a demand for simplicity, (2) discretionary thrift, (3) mercurial consumption, (4) green consumerism, and (5) ethical consumerism. Consequently, consumers were affected not only economically but also psychologically (Vázquez-Martínez et al., 2021).

One of the main trends we are witnessing it's the **digital aspect**. We have experienced a process of gradual adaptation with the use of the Internet and e-commerce. Progress has been quite fast. At first, we started buying things like air tickets or booking hotel stays and gradually we leaped to buy more personal or everyday objects (Irene, 2019). The arrival of new information technologies (ICTs), led to a change in consumer behavior. We are now faced with new consumers, who are much better informed and who, thanks to the Internet and social networks, can find a multitude of opinions on the products they want to buy (Irene, 2019).

As mentioned in (Irene, 2019), we can highlight 5 main trends that have emerged in the last years, and in some way change the way we consume, they are:

1. **Video marketing -** the presence of videos in marketing campaigns increased and added value for the user, facilitating user interactivity and improving engagement

between brand and customer. In this area, new developments have emerged such as 360° videos and virtual reality.

2. **The incorporation of IGTV** into Instagram - incorporating this new video format in the application exclusively for mobile users allowed longer videos to be viewed and has relaunched it as one of the most powerful marketing channels on the Internet.
3. **Chatbots** - these are computer systems with artificial intelligence that enable simulating conversations with the customer so that they can raise queries and solve complaints. They allow savings in personnel costs, more efficient and fast interaction with the customer, and even convenience for some users. This is a system that has seen an increase in websites and will be further refined.
4. **Voice Search -** being able to interact by voice with different devices is a trend that companies are increasingly considering. In addition, new devices have been added such as Google Home and Amazon's Alexa, which extend the use of voice to a great variety of possibilities.
5. **Influencer marketing -** Influencers are known people with a great number of followers on their social networks, impacting 60% more than traditional ads (Del Castillo, 2019). Therefore, many brands use them to promote their products and services through social networks.

According to Nogueira (2021) there are still some other trends that can be identified and that made a change in consumer behavior:

- Digitization at breakneck speed – different audiences now have quick access to information and relationships between customers and brands are intensified, increasing the focus on relationships and experience.
- Want to be part of a community and to value the opinion of others – a social being highly impacted by influencers. It tries to read reviews of a product or service made by other consumers before making the purchase itself.
- Values personal communication – need to feel that the brands know and understand you individually and that they adapt the offer to your needs and specificities.
- Sustainable and conscientious consumption – an important thing nowadays that cannot be ignored by brands. The consumer is involved in the debates for conscious and sustainable consumption and the digital boom that we are witnessing makes this facet of the consumer even easier.

With these new trends in consumer behavior, a new target has also emerged – the **male target**. For many years the cosmetics industry has been seen as being only directed at women and never used by men, but things have changed in recent times.

As mentioned in *Sapo*, brands have shown themselves increasingly attentive and interested, launching lines of treatment and make-up for men. Chanel, for example, announced in August 2018 the creation of a men's make-up line consisting of a base, a lip balm, and an eyebrow pencil (Porto, 2021).

The same has happened to other brands such as Yves Saint Laurent, Tom Ford, Menaji, and Myego who, in 2019, created male-specific products such as eyeliner, shiners, and self-tanning creams, following the commercial strategy that has been globalizing "progressively".

According to Grand View Research, in 2019 the male cosmetics market reached a worldwide value of about 39 billion EUR. In Portugal, the percentage of men who use face care has risen to 84%. A study conducted by L'Oréal Portugal in 2019 also found that 75% of Portuguese men already used beauty products and that 89% even had an active role in choosing and purchasing the products they use. However, 64% still use unisex ranges (Porto, 2021).

4. Online Consumer Behavior

In the past, all purchases made by the consumer were limited to the physical level. Going to a supermarket, to a restaurant, to a clothing store was the "old normal". Today, things are no longer the same, and digital has become an important part of our life. Now we can do our shopping of the month online, order tonight's dinner or buy any clothes through an app. The pandemic has further intensified this.

If before there was a multitude of stimuli around us, in the online world, it's all different. Factors that influence online consumer behavior are: individual characteristics of the consumer (behavioral characteristics and endogenous factors), influences exerted by the environment (structural influences the uncertainty, the concurrence, the market concentration, as well as national and international regulations and characteristics the juridical structure, restrictions concerning commerce), product or service characteristics (quality, type, degree of knowledge of the product), online environment characteristics (attributes of online shoppers quality, viability, security, the ease of the usage, as well as factors concerning the characteristics of web pages the ease of Internet surfing, the speed of the network) and online organization characteristics (online shops attributes) (Cetină cit. Cheung M.K. et al.,2005).

With the availability of access to computers connected internet, as well as mobile phones and tablet computers, everywhere, like at home, office, or facilities such as public libraries, restaurants, and cybercafés, this trend of shopping has become a common mode of transaction. Apart from daily life ranging from the purchase of flight tickets, booking hotel rooms, movie tickets, fashionable apparel, and beauty products and is now also embracing online grocery (Amin & Mohd ,2013). Among the items bought by e-consumers, travel-related products are on top of the list with 82,2%, followed by books (69%) and general consumer goods (59 %) (Ariffin et al., 2018).

Despite the momentous growth of online shopping and electronic commerce (e-commerce), this astonishing development has led to some new problems and challenges that the foremost internet users' concerns comprising the **security of payment, data protection, the validity and enforceability of e-contract, insufficient information disclosure, product quality and enforcement of rights** (Ariffin et al., 2018).

There are more risks and less trust in an online setting compared to physical stores because it is likely difficult to assess the product and the security and privacy issues in the purchasing process (Laroche et al., 2005). In fact, online shoppers might feel a certain degree of risk with security tools and time delivery because their expectations of losses on product information quality over the website, transactions over the internet, and delivery are higher (Ariffin et al., 2018). That is the reason why, when purchasing online, the consumer has some level of risk that will automatically influence his online purchase intentions. We can identify 6 types of risks (Ariffin et al., 2018):

1. **Financial risk** is defined as the probability of an internet shopper suffering monetary loss from a purchase when the product does not perform well or if the product is not worth the price paid (Han & Kim, 2017).

2. **Product risk** involves a potential loss if the product did not meet consumer expectations in terms of product standard and quality. Product risk denotes the possibility of product failure to meet the performance of what it was originally intended for (Zheng et al., 2012).

3. **Security risk** is defined as a potential loss due to online fraud or hacking, which exposes the security of an internet transaction or online user (Soltanpanah et al., 2012). Azizi and Javidani (2010) stated that security is linked to the disclosure of financial information such as credit card numbers, account numbers, and safe PINs.

4. **Time risk** comprises the troublesome experience through online transactions that are often caused by the struggle of navigating and/or submitting the orders and delays in getting the products. It refers to the time that consumers take to make a purchase, the waiting time for the products to be delivered to their home and the time that consumers had spent browsing product information (Han & Kim, 2017).

5. **Social risk** is a key element of perceived risk as it interprets society's influences on a consumer's decision. Social risk refers to the perceived judgment on the product purchased that creates dissatisfaction among family, friends, or communities (Dowling & Staelin, 1994).

   When it comes to **social factors** the ones that have a bigger impact on consumer behavior, are without a doubt: reference groups, family, and social roles and status. Social risk refers to the perceived judgment on the product purchased that creates dissatisfaction among family, friends, or communities. Besides, social risk may involve the feeling of fear, especially from family and friends who disapprove their online purchases (Han & Kim, 2017).

6. **Psychological risk** is acknowledged as the possible loss of self-respect due to the frustration of not attaining a purchasing goal (Stone & Grønhaug, 1993). The psychological risk may also be defined as a consumer's dissatisfaction in choosing a poor product or service despite having a huge array of varieties (Ueltschy et al., 2004).

   The most representative **psychological factors** that influence online consumer behavior are trust, personality, and website aesthetics. Personality is a big influence in the online environment, consumers may have different personalities as compared to their day-to-day lives; and they may even use alter egos to communicate in the virtual world (Cetină et al., 2012).

5. Effects of the COVID-19 Pandemic on Consumer Behavior

Our personality, ambition, and motivation are automatically linked to our form of consumption. One inevitably influences the other. With the onset of the pandemic, everything has changed, everyone lived complicated moments that made each one of us different, so it is important to realize what consequences it has brought to consumer behavior.

Consumers sentiments influence their choice of purchases and shopping channels, and these have evolved along with the changes brought by COVID-19 and the related interventions of public authorities. The crisis has created two types of consumers (Hesham et al., 2021):

1. consumers who remain pessimistic and continue to stockpile essential items, possibly preferring online shopping.
2. consumers who are relatively optimistic and continue to purchase nonessential goods and services through various channels.

The pandemic has brought different states of mind that had an impact on how consumption happens nowadays. During this pandemic, people have reported experiencing negative emotional states such as **depression** (Chao et al., 2020; Mazza et al., 2020), **boredom** (Chao et al., 2020), **anxiety** (Maza et al., 2020), anger (Trnka & Lorencova, 2020), and **fear** because of the uncertainty about when the pandemic will end (Addo et al., 2020).

The Fear that has been experienced due to COVID-19, can be linked to other reactions associated with food consumption phenomena (Gómez-Corona et al, 2021).

Indeed, people display significantly changing behaviors because of the adverse emotions elicited by COVID-19, especially concerning consumption. For example, panic buying is exemplified by consumers who stock inordinate quantities of daily essentials such as toilet paper and canned food because of the fear triggered by the uncertainty about when the pandemic will end (Islam et al., 2021; Naeem, 2021; Omar et al., 2021; Prentice et al., 2020). Others may demonstrate the behavior designated as revenge spending and aggressively buy discrete items to relieve suppressed and negative emotions, including luxury goods. A similar phenomenon occurred in South Korea and the United States (Park et al., 2022). Those who could not spend money on travel, dining out, or shopping at the same scales as before the COVID-19 outbreak took to aggressive spending with a vengeance when the opportunities emerged (Park et al., 2022).

However, the impact of COVID-19 on consumer behavior, it’s not just related to our emotions and states of mind, other relevant factors make this a new reality for each of us.

People’s reactions to the COVID-19 pandemic vary according to age and gender. People have different levels of concern about the effects of the pandemic, and this guides their behavior (Hesham et al., 2021). From an economic point of view, older people feel less affected than younger. From a physiological point of view, the health consequences have forced them to change their purchasing habits (Hesham et al., 2021). Women also tend to be more concerned about the health effects of the pandemic than men. During the COVID-19 pandemic, personal factors such as age and gender are key factors in explaining behaviors and moderate the relationship between the intent to buy and purchasing decisions (Hesham et al., 2021).

In pandemic times, **risk attitude** and **risk perception** are the most important factors driving consumer behavior (Hesham et al., 2021). For example, during the pandemic, consumers sought to reduce risk by limiting their visits to shops and restricting their purchases to essential items, redirecting much of their expenditure to online commerce instead (Hesham et al., 2021).

As a consequence of the extraordinary containment measures, consumers are, of course, shopping differently (Pantano et al., 2020). For instance, elderly consumers are switching to online purchases, that they never considered before, discovering the safety and benefits of home-deliveries, store pick-up, and cashless payment (Pantano et al., 2020). In addition to the acceleration of online retailing, other distribution options in which no physical human interaction is needed may gain popularity (Amazon, 2020; Kirk & Rifkin, 2020). Anti-epidemic measures and the call to leave the house only in the most urgent cases have brought a large number of orders for delivery that resulted in the growth of this business in the order of tens of percent (Eger et al., 2021).

COVID-19 has also brought priorities in the items of consumption. If people used to give more value to luxury things, in this phase everyone started to appreciate even more the simple things of life, and of course, what was bought was no exception.
Furthermore, when a crisis occurs, consumers did not want to spend money on high-quality or high-value products even when they could afford such items (Vázquez-Martínez & Morales-Mediano & Leal-Rodríguez, 2021).

Customer behavior was influenced by the COVID-19 pandemic itself as well as by government restrictions. Consumers from all generational cohorts reported digitally purchasing goods and services at a higher rate during the COVID-19 crisis, though Baby Boomers were important drivers of e-commerce growth (Jílková & Králová, 2021). Overall, there was a considerable shift to digital spending because 43% of all respondents had shopped online since the COVID-19 crisis began in comparison with 12% before the crisis. Purchasing frequency increased as well. Weekly shopping via the Internet was reported by 25% of respondents compared to 9.8% of respondents before the COVID-19 crisis across all generational cohorts (Jílková & Králová, 2021). According to Sheth (2020), hoarding was the first immediate effect of the COVID-19 pandemic on consumption and consumer behavior. During the pandemic, consumers stockpiled essential products such as “toilet paper, bread, water, meat, disinfecting and cleaning products”.

Given the likelihood of further waves of COVID-19 and future pandemics, there have been calls to identify and explain the types of products that are being hoarded by consumers (Kirk & Rifkin, 2020). During the SARS pandemic, for example, there was notably a “dramatic rise” in orders for cleaning products, such as bleach from Hong Kong's leading online retailer (Forster & Tang, 2005).

First, increases were evident in the consumption of food and non-alcoholic beverages, online educational services, and online content. In Europe, more specifically in the Czech Republic, between March 2020 and April 2020 there was a decrease in spending on non-food categories such as online booking of leisure activities, transport tickets, body care, and fashion clothing, footwear, and accessories. Spending on these categories decreased by over 40% from April 1, 2020, to May 1, 2020, compared to November 1, 2019, to December 1, 2019. Second, e-commerce was affected by a change in the primary used to access online shops and the payment method used. The personal computer became the most preferred device (52%) for searching and purchasing online during the second wave of this research compared to the pre-crisis greater use of smartphones and tablets (Jílková & Králová, 2021).

In a recent study, McKinsey & Co. reported that 75% of US consumers had tested new brands or channels during the crisis, with many adopting “digital and contactless services including curbside pickup, delivery, and buying online for in-store pickup” (Arora et al., 2020). Most consumers planned to continue using omnichannel or fully digital retailers once the crisis subsided. Market research firm Neilsen recently reported that Chinese “pandemic-led shifts to further online adoption and an increased focus on neighborhood and small-format stores have become an ongoing normal” (Sheth, 2020).

More consumers, mainly from the small Baby Boomer and Silent Generation samples, were attracted to online shopping during the COVID-19 crisis by necessity due to closed stores and infection risk. Most of these consumers reported that they planned to continue online purchasing. The new reality is that customer and shop interactions have increasingly moved online (Jílková & Králová, 2021).

6. Consumer Behavior After Pandemic – Portuguese Market

According to (Santos, 2020) some behaviors will stay after the pandemic. The fact is that in the Portuguese market e-commerce never had a big highlight in most industries.

During the pandemic, many companies were obligated to experiment with new channels of selling and, in some cases, it went quite well, but in others, they lost most of their main clients. In the immediate future, people will look to avoid, minimize, and get away from all the things that cause them aversion and adopt, and stimulate everything that causes them satisfaction. Some recommendations that most companies can adopt when they don't know what is happening are:

- **Permanent assessment**, try to evaluate the experiences that clients most appreciate and the ones that they don't, to replicate the good and improve the bad.
- **Flexibility and quick response –** looking is not enough, we need to respond fast to the market and try to develop dynamic types oriented to the client (Santos, 2020). As stated in Kantar, more than a year and a half after the pandemic arrived in Portugal, there is no doubt that there have been changes in consumer behavior globally and the Portuguese were no exception. Andreia Carvalho, Client Director & Expert Solutions at Kantar Portugal, highlighted that at this stage, it will be possible to separate consumers into five clusters according to four major dimensions: concern for Covid-19, the current economic situation of the household, the future economic situation of the household and the level of optimism.

According to Lima (2021), we can identify these 5 groups:

- First, the **vulnerable**, a mix of workers and unemployed, between 50 and 64 years old, urban, middle class, and with small children.
- Second, the **fearful**, characterized by being people that don't work at home, of the lower middle class, being between 50 and 64 years old, residing in the North, and having children already grown.
- Third, the **stable.** That are the ones mostly retired, over 65 years old and residents in Porto, having households of one or two people of the lower class. It is the group with the lowest *ticket*, but the most frequent purchase for the home. It is also characterized by being the group that buys more brands from manufacturers.
- Fourth, the **confident** ones. That are people that don't work at home and are between 35 and 49 years old, being mostly from the South, the lower middle class, and children. They are also the ones that buy the most distribution brands.

- Finally, the **realists** are up to 34 years old and are mostly from Lisbon, upper and upper middle class. They are on teleworking and have small children. They are those who make more stocking of FMCG products with more valuable and less regular baskets. As they work from home, they are the ones who most use food delivery services.

Cosmetics

Nowadays, talking about cosmetics is something almost banal and we don't think that much about how it started. But, for thousands of years, men and women have used cosmetics, maybe not with the term we know today. In fact, the use of cosmetics, fragrances, and personal care products can be traced back to ancient times as early as the Egyptian, Greek, and Roman eras (Kumar, 2005).

Around 3500 B.C there were already signs of eye painting in the Egyptian tombs. In ancient Greece oils were used for baths and other products to beautify and, in ancient Rome, charcoal was used to outline the eyes, and abrasive products to whiten teeth. For all this, we can say that humans for time immemorial have used cosmetics (Kumar, 2005). We can also trace the use of cosmetics back thousands of years ago when people painted their bodies for religious ceremonies, war, and mating rituals (Kumar et al.,2006). If we had to explain what a cosmetic is, we say that it is a substance or a treatment that is applied to the body, face, and hair, that will change someone's appearance, making the person more confident and attractive. Beauty services are widely used for stress relief or to enhance confidence. Many individuals rely on regular beauty treatments to boost self-esteem, body confidence and to reduce stress (Pikoos et al., 2020). In a general way, cosmetics are a complex world, unlike other sectors such as the medical or food industry, it is deprived of genuine independent research into the ingredients and their effectiveness (Mautino, 2018). In sum, "cosmetics can be viewed as therapeutic interventions to help a person feel" and look better, being used "as a vehicle to promote health care and general psychological and social, wellbeing" (Morganti et al., 2021).

1. Evolution of the Cosmetic Industry

If we try to go back to understand the cosmetic market evolution, we find that the cosmetic industry was the most successful industry during the Great Depression from the early 1930s till the end of World War II (Ramli, 2015). In the last 20 years, Global Beauty Market has grown by 4.5% a year on average (CAGR), with annual growth rates ranging from around 3% to 5.5%. Also known as Cosmetics and Toiletries or Personal Care Products, this market has proven both its ability to achieve stable and continuous growth as well as its capacity for resilience in unfavorable economic conditions (Łopaciuk & Łoboda, 2013).

According to the Cosmetics Europe Personal Care Association, there are 7 categories of cosmetics and personal care products. They are oral care, skin care, sun care, hair care, decorative cosmetics, body care, and perfumes (figure 2).

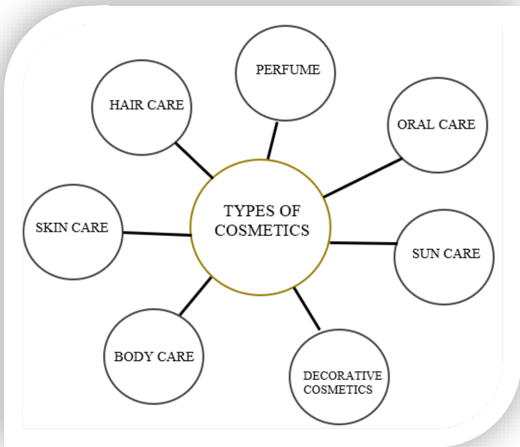


Figure 2 – Personal Care Association, types of cosmetic

However, despite these seven types of cosmetics, the global beauty market is usually divided into five main business segments: skincare, haircare, color (make-up), fragrances, and toiletries. Finally, another factor contributing to the growing demand in the cosmetic market is the rapidly expanding middle class. The number of middle-class households has never been growing as fast as it is today (Łopaciuk & Łoboda, 2013).

2. Trends in the Cosmetic Field

Like any other sector, certain trends tend to pass, and others just stay. Nowadays, it is important to understand what these trends are and what changes they have also undergone.

As technologies develop, the cosmetics industry is also trying to take advantage of new opportunities and interact with consumers on a more "practical" level. This happens, for example, through interactive social media like Facebook, blogs, and websites with beauty advice or apps for smartphones. People are caring more a more about the environment and, for this reason, the products they look for must correspond to this new issue. Another new trend is sustainability - when introducing new products, cosmetics manufacturers increasingly start emphasizing that they were produced in a way that was not harmful to the environment whilst their effectiveness remained comparable to their previous versions.

E-commerce outlets continue to expand their range of products, websites explaining the specifics of the different products, and price comparison engines mushroom. All those new players will put even bigger pressure on traditional drugstore shopping (Łopaciuk & Łoboda, 2013).

We are also assisting in the naturalization of this industry. Many companies are renovating the range of products to more natural ones. In fact, it is now clear the significant level of interest in natural products by the cosmetic industry, mainly due to growing consumer concerns about environmental sustainability and health (Vecino et al., 2017).

3. Innovation & Globalization

Innovation must be present everywhere, and it is what leads to a change in the customer's consumption habits. We all like to see different products emerge and follow the "trends" mentioned above. We define innovation as the operationalization of creative potential with a commercial and/or social motive by implementing new adaptive solutions that create value (Singh & Aggarwal, 2021). The cosmetic industry will continue to invest money into R&D, as innovation is the key to success (Kumar et al., 2006).

Innovation relies on marketing knowledge and branding, derived from product, advertising, sustainability, and distribution and all of this continues in parallel with world globalization.

Global brands in the cosmetic industry rely on innovation to support sustainability programs in production and operation, packaging, distribution, promotion, and advertising. They are reducing the environmental impact of their cosmetic products by using greener formulations, reducing packaging, and cutting greenhouse gas emissions, waste, energy, and water consumption (Ramli, 2015).

Globalization has also changed everything. We are now always connected, and we can see and know everything in record time, whether we are on the other side of the world, and this does not only apply to people but also industries. Everything that comes out on the internet, good or bad, ends up staying forever.

The stereotype of the cosmetic industry associated only with women has changed, owing to the existence of several men's production lines in the market, as we mentioned before. The cosmetic industry sales are also shifting from North America and Europe to emerging markets such as South America and Asia (Ramli, 2015).

4. Green Cosmetic & Naturalization

Sustainability is the new dimension on which the cosmetic industry is focusing. Every year more than 10 million pieces of plastic end up in the oceans, damaging flora and fauna, polluting lands and the environment, and risking the health of all humans (Acharya et al., 2021).

As we know, the resources of our world are running out and more and more it is necessary to change our habits. There has been an awareness of the environmental problems that not only the cosmetic industry but also many others bring to our planet. For all this, the new term "*Green Cosmetic*" has emerged.

Going back a little, what does green cosmetics mean exactly? In marketing the word “green” has become synonymous with “organic” or “healthy” and normally these “green products” are those that use environmentally friendly formulations, production practices, or packaging methods. The products that are just helping the environment but also us because there are less prejudicial to our health.

Cosmetics are gaining popularity in recent years due to the awareness of mankind towards harmful chemicals and their long-lasting effects on health. According to the market analysis project, the expected rate of cosmetic industry growth is 10% per year till 2024 (Acharya et al., 2021).

But the fact is that we have well-known brands that are really making this switch in the way they communicate their products. Avon, for example, focuses on recycling and minimizing material use as it strives to reduce waste along the production cycle and Estée Lauder chemists select the ingredients of products according to sustainability criteria by Green Chemistry (Ramli, 2015).

The green trend could be responsible for consumers looking for “natural” ingredients in cosmetic and personal care products. Green products have a variety of advantages, for example: Less water, material, and energy usage during production, non or slightly pollutants to natural environments, and their packaging can be recycled (Amberg & Fogarassy, 2019).

The truth is that consumers are not just looking for cosmetics characterized for their effectiveness and safeness, but also their naturally derived ingredients and production through sustainable technologies (Morganti et al., 2021).

When we are thinking of buying a product, we also look at its price and the fact is that green cosmetics are often more expensive, which may result in fewer consumers being able to buy them. But, on the other side, we also must understand that the ingredients of natural cosmetics need to be selected based on their safety and efficiency, regardless of whether them being natural or synthetic makeup materials (Amberg & Fogarassy, 2019). In short, we can say that green cosmetics market is growing visibly despite the big price they charge.

5. Cruelty-Free

For a long time, testing products and their ingredients on animals such as monkeys, rabbits, dogs or mouses, was a common practice. According to Galileu magazine, in ancient Greece doctors already dissected live animals for studies of anatomy and physiology.

However, over the years, the cosmetic industry began to re-evaluate the adoption of testing products on animals. More precisely in the 1970s, groups of activists who defended the end of this cruelty began to emerge. Animal rights activists vandalized many laboratories in the United States until the late 20th century (Roten, 2008).

In fact, there is an increasing concern among people, not only for environmental rights but also for animal rights. When we hear the term "Cruelty-Free", i.e. refers to products that are developed without any kind of animal testing.

REACH (Registration, Evaluation, Authorization, and Restriction of Chemicals) and the Regulation on cosmetic products advocate for a change in the way toxicity testing is conducted, proposing a shift from in vivo testing, towards non-animal approaches based on in vitro and computational methods (Pistollato et al., 2021).

According to the Cosmetics Regulations, in the EU, the marketing of cosmetics products and their ingredients that have been tested on animals for most of their human health effects, including acute toxicity, is prohibited (Vinardell, 2015).

Along this line, EU regulations call for the use of alternative non-animal methods, and over the last decade, an increasing number of alternative approaches have been developed and formally adopted (Pistollato et al., 2021). As stated in Cosmetics Design Europe, China's legislation still requires animal testing for all imported cosmetics, but it is slowly moving towards a cruelty-free future.

So far, over 40 countries worldwide have banned or restricted animal testing on cosmetic ingredients. In the EU this type of practice has been banned. Alternative methods to replace animal testing have been mandatory in Europe to evaluate cosmetics ingredients since March 2013, according to a Commission Decision (Vinardell, 2015).

There is still a long way in the process but it's already positive that a change is being made, also because this doesn't affect only the animals, but also affects us that are using this cosmetic. According to Vinardell (2015), attention needs to be paid to long-term safety aspects, since cosmetics products may be used extensively over a large part of the human lifespan and sensitive groups of the population such as children, old people, pregnant women, etc., may be affected.

6. Covid-19 Impact

The year 2020 was atypical, a virus from China reached the whole world and changed not only what was our daily life but the mentality and needs of each one of us. 99% of our time was spent at home and all shopping centers, stores, restaurants, theatres, coffees, and airports were closed. All industries were affected by this unpredictable event and it's important to make a quick view of what happened.

The skincare and cosmetics industry has responded in a very positive manner, with more and more brands switching the process of manufacturing for producing hand sanitizers or some other cleaning agents. According to McKinsey (2020), there has been a fall of 20-30% in the demand for cosmetic products in the world at that time (Kalyani, 2021).

Another category that witnessed some changes was cosmetic dermatology. In fact, when it comes to understanding COVID-19's impact on a cosmetic dermatology practice, two aspects are worth distinguishing: practical and psychological. During lockdowns, patients are prevented from availing of nonessential facilities due to movement constraints.

In addition, a slowing economy and reduced discretionary spending discourage customers to undergo expensive cosmetic treatments imposing a practical restriction (Galadari et al., 2020).

Some of the results of this pandemic on the industry are the decline of some cosmetics categories, such as color cosmetics, fragrances, and hair removal, with growth in skincare promoting well-being and self-care able to slow down the skin-aging phenomenon (Morganti et al., 2021).

After the beginning of the unlock process, the situation changed but people still give priority to personal safety and personal hygiene, and beauty and cosmetic products (Kalyani, 2021).

According to (Kalyani, 2021) there were:

- Decrease in demand for Beauty and cosmetic products (31%)
- Decrease in the number of customers buying beauty/cosmetic products (37%)
- Decrease in customers' total basket size for beauty and cosmetic products (36%)
- Decrease in profits from the beauty and cosmetic segment (32%)
- Decrease in Customers enquiring about new cosmetic products (39%)

We already mention sustainability before because it is one of the most important, not just before the pandemic but also during the pandemic.

With the growing pandemic all over the world, sustainability has now become the utmost priority for many businesses. The chemical composition used in cosmetics is tremendously increasing, with the outbreak of booming technologies, rapidly increasing the number of beauty blogs, and influencer's charming beauty profiles, promoting consumers to move towards greener alternatives when it comes to cosmetics, and personal care regime (Acharya, Bali, & Bhatia, 2021).

Besides these facts, the recent development of the COVID-19 epidemic, and the need to reduce gatherings have altered daily life, and thus the demand for online shopping has surged. This has also allowed many industries to accelerate their development towards online shopping, especially the retail industry which directly faces consumers (Lo & Tseng, 2021).

We have seen changes in the lifestyle of people due to the pandemic. The coronavirus disease (COVID-19) pandemic has resulted in significant negative psychological impacts on our life. Not doing adequate cosmetic care of skin, hair, and nails might be one of the underexplored but preventable reasons for the same (Marahatta et al., 2021).

Skin health was also affected directly by COVID-19-related skin manifestations and indirectly by personal protective equipment-induced dermatitis. There are many reasons for negative mental health impacts during the COVID-19 pandemic. Among all, the inability to maintain cosmetic care of self might be another important but unexplored reason (Marahatta et al., 2021).

7. E-Commerce Increase in the General Market

E-commerce has been growing over the years in response to the occurrence of buying online that has appeared and is here to stay. To understand, e-commerce is when we sell or buy a product or service over the internet. During the pandemic online channel has become the major one, people couldn’t leave their houses so there were not so many other options, besides that one.

Purchasing online has accelerated, particularly during the global crisis of COVID-19, and it results in a massive shift in purchasing behavior across the entire market. E-commerce, therefore, helps customers control everything and enables them to purchase products or services online from anywhere (Nguyen et al., 2021).

In recent years, selling cosmeceuticals through online platforms, which are cheaper than the open-shelf self-service model, has become increasingly popular. This model is welcomed by young people who are accustomed to online consumption (Lo & Tseng, 2021).

Not all industries are the best for an online purchase, it is often necessary to physically go out and see the products, but in the case of the cosmetic industry it turns out to be quite easy to purchase online, which makes it an industry even more appealing.

This justifies why among the most popular items of e-commerce, the cosmetics and personal care market are considered one of the strongest sales conductors (Nguyen et al, 2021). However, there is a dark side that affects most online stores: the purchase intention. Often in a store we see the product, try it and buy it, all the involvement of the store helps us to do a final purchase. Online it is easy to lose focus and move to another site, leading to a lot of traffic but little conversion in reality. In the context of e-commerce, purchase intention is concluded to highly impact online shopping behavior and finally leads to action in real life (Nguyen et al, 2021). Another reason for E-commerce not having is "Boom" is credibility. Customers' hesitation to purchase arises from several problems with online shopping. Trust in online payment methods is still low because only a small proportion believes that online shopping is safe (Nguyen et al, 2021). Trust is claimed to be a crucial factor for a company's success in e-commerce (Lu et al., 2010). Trust is defined as the extent to personal assurance that online stores will fulfill their commitments, act as anticipated, and pay attention to their buyers (Dachyar & Banjarnahor, 2017). According (Nguyen et al., 2021) 53% of Internet users worldwide used mobile devices for online shopping in 2017.

The popularity and rapid growth of e-commerce signal a huge market opportunity for e-retailers. After its progression into a global network of connectivity, the Internet has grown from a technical technology system into a helpful marketing tool for both domestic and international markets. But even if this new "online store" is growing day by day there are still people that prefer the offline "mode". If right after the pandemic everyone was afraid to go into the stores and do their purchase, putting e-commerce on top makes the roles change. The world is slowly coming back to normal and so are the people. Going out to the mall is now a great program that brings a win-win situation for both online and offline channels these days.

In this context, it is important to understand how e-commerce has grown in the last 2 years, by taking a closer look into the **European market**. Unsurprisingly, the percentage of European households that have purchased grocery products online in the last 12 months still differs by country, with basket sizes and expenses varying between markets. In the United Kingdom and France, e-commerce penetration was approximately 48% at the end of 2020, while Spain and Germany recorded penetration rates slightly above 20%. The potential to raise these levels of penetration to reflect the rest of Western Europe leaves immense opportunities for e-commerce growth (Nielsen, 2021). We can understand better these numbers by looking at figure 4.

Disparidades no peso do e-commerce nos BGC em cada mercado

E-commerce nos BGC na Europa Ocidental

	U.K.	France	Italy	Spain	Germany
Penetração	48%	48%	41%	22%	21%
Gasto por visita	€74.00	€61.90	€42.40	€46.00	€37.20

Fonte: NielsenIQ Consumer Panel, FMCG. Europe E-Commerce (excluding Pet Specialists), GB/FR/ES: MAT KW36 2020, DE/IT: MAT KW 53 2020

Figure 3 – Europe E-commerce 2020

According to Jens Ohlig, Managing Director of Nielsen for Western Europe, e-commerce represented more than EUR 30 billion in the five major European countries alone in 2020. "The growth of online channels for retailers who get the formula right is more than offsetting the lower growth rates in stores," says Ohlig. "As we have seen in other regions of the world, although online sales are on the rise, there is still room for growth - particularly in food. Issues that we used to see as barriers, like the ability for each buyer to select their own fresh food, have eased since Covid-19 pushed us into a more restricted life. The aspects that used to be barriers to entry are no longer so strong, and this has been clear in our e-commerce measurement" (Nielsen, 2021).

On the other hand, if we analyze only the **Portuguese market**, we can conclude that in 2021, the proportion of e-commerce users continued to increase: more 5.2% than in 2020. The rate of e-commerce use increased mainly in the case of women, more than 8.8%, with a significantly higher proportion (43.2%) in 2021 than men (37.4%). The type of products or services ordered is the same as for 2020, with the predominance of users who ordered clothes, shoes, or accessories (69.0% in 2021 and 60.4% in 2020), deliveries from restaurants (46.0% in 2021 and 38.2% in 2020) and films, series or sports programs (34.9% in 2021 and 34.3% in 2020). In 2021, the proportion of households connected to the internet at home through broadband increased by 2.4% compared to the previous year, reaching 84.1%. Internet users in 2021 do it mainly to communicate and access information: 91.4% exchanged instant messages (via WhatsApp, Messenger, etc.), 87.6% sent or received emails, 86.7% searched for information about products or services and 81.3% read the news. The proportion of people teleworking decreased by about 11% compared to 2020, from 31.1% to 20.1%. The reference to the COVID-19 pandemic as a justification for working from home has also decreased, from 29.6% in 2020 to 17.5% in 2021 (Instituto Nacional de Estatística, 2021).

8. Cosmetic Market and the Impact of the COVID-19 – Nacional & International

Despite an unprecedented crisis of supply in 2020, the global cosmetics market is a dynamic market that saw a significant recovery in the second half, driven by strong consumer demand. The long-term potential is driven, most notably, by the rise of the middle- and upper-income classes, as well as by the growing number of senior citizens and growing urban population on the lookout for products that meet their diverse aspirations (L'Oréal annual report, 2020).

Over the last 10 years, we have witnessed increasing growth in the sector, among which the last 2 years were an exception, considering the economic and social situation that the world has been living. The table below shows the % of growth every year for the last 10 years (L'Oréal annual report, 2020):

At the world level, before the pandemic struck, beauty and personal care were growing at 6.8% – more than twice the growth of total FMCG (2.9%). Skin moisturizers (10.7% growth) and hair care (8.5%) were the main drivers. These categories had a combined 39% of sector spending and were responsible for over 50% of total growth (Cawthray, B.,2020).

Years	Growth of the worldwide cosmetics market over 10 years (in %)
2011	4.6%
2012	4.6%
2013	3.8%
2014	3.6%
2015	3.9%
2016	4%
2017	4.9%
2018	5.5%
2019	5.5%
2020	-8%

Figure 4 – Value Sales evolution Cosmetic market

According to figure 4 (Kantar), the category hit hardest by COVID-19 has undoubtedly been cosmetics. As restaurants, bars, and nightclubs around the world closed, category usage reduced dramatically. By September, make-up sales had fallen by 14.2% (Cawthray, 2020).

In 2020, the global cosmetic market decreased by an estimated eight percent in comparison to the previous year, considering skincare, hair care, make-up, toiletries, and oral cosmetics as the main product categories of this market. Skincare was the leading category, accounting for about 42 percent of the global market. Hair care products made up a further 22%, while make-up accounted for 16% in 2020 (Statista, 2021)

The success category throughout the COVID-19 pandemic was hand and body wash. The refocus on hygiene, with the use of anti-bacterial gel encouraged by many governments has been incredibly beneficial to the category (Cawthray, 2020).

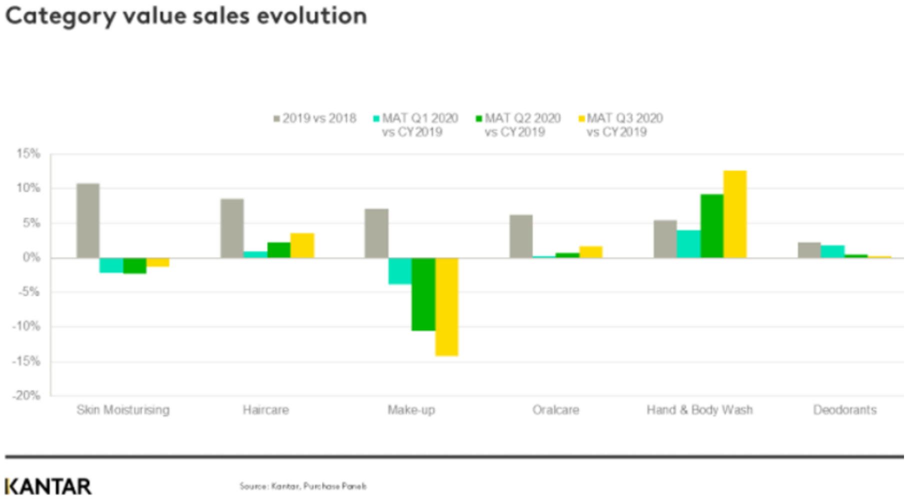


Figure 5 – Value Sales evolution Cosmetic market

When we talk about the sectors of the cosmetic market affected by this pandemic, we automatically relate them to the companies where they operate.
We have witnessed that key companies including Beiersdorf AG, Chanel S.A., Coty Inc., Estee Lauder Companies Inc., Henkel AG & Company, KGaA, Johnson & Johnson, Kao Corp, L Brands, Inc., and L'Oréal SA and many more suffered from the COVID-19 pandemic impact. Cosmetic companies such as Procter & Gamble Co/the have experienced some major setbacks in the market of China. One of the major effects was on the company's global supply chain which was affected by halted factory work in China. Moreover, countries such as India have lockdown the whole nation, and major e-commerce companies including Amazon.com, and Walmart, owned by Flipkart, have halted the supply of non-essential products (including cosmetics) which is also expected to affect the cosmetic industry shortly (Research and Markets, 2020).

Still, in a World dimension, we can identify the Worldwide players in sales – billions of USD (WWD, Beauty's Top 100, May 2020, based on 2019 sales):
1st - **L'Oréal** with 33,43 billion
2nd – **Unilever** with 22,49 billion
3rd– **Estée Lauder** with 15.90 billion
4th – **Procter & Gamble** with 13.90 billion
5th – **Shiseido** with 10.09 billion

In fact, in 2020 the only cosmetics market that recorded growth was the **Dermocosmetics market,** as we can see in the graphic below (L'Oréal annual report, 2020).

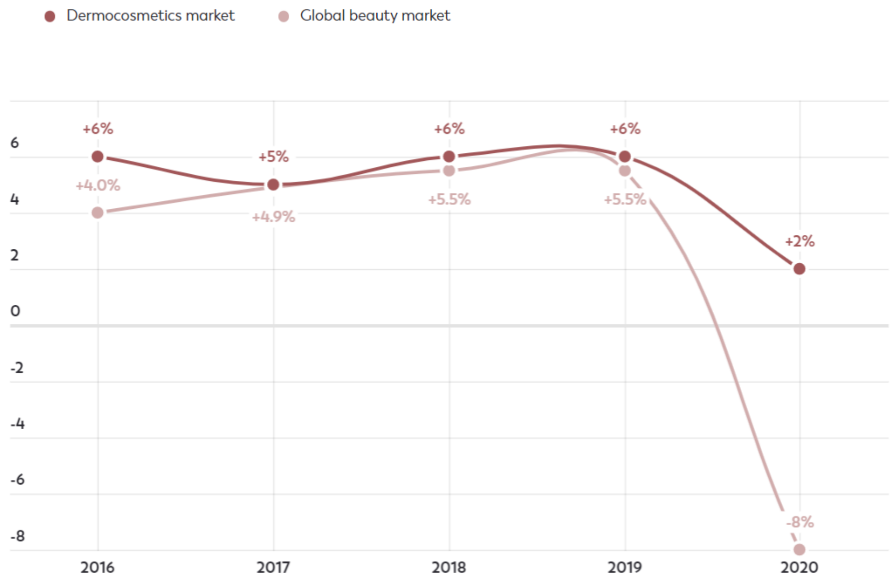


Figure 6 – Cosmetics market that registered an increase

Europe is the global flagship producer of cosmetic products. In 2018, the European cosmetics market was valued at €78.6 billion, making Europe the largest market for cosmetic products in the world. Trade is a critical component of the industry, with trade in cosmetic products and ingredients (within the EU30) exceeding €35 billion. Around €21.5 billion worth of cosmetic products were exported from Europe in 2018 (Cosmetics Europe, 2019).
It is estimated that the cosmetics industry brings at least €29 billion in added value to the European economy every year, of which approximately €11 billion is contributed directly by the manufacture of cosmetic products (the remaining €18 billion is generated indirectly through the supply chain). More than 5,800 SMEs are involved in the manufacturing of cosmetics in Europe. In addition, there are over 100 companies manufacturing cosmetic ingredients in Europe, 23,000 enterprises involved in the wholesale of cosmetics, and 46,400 specialist stores retailing cosmetics (Cosmetics Europe, 2019).

Among the European countries, Germany has the largest market for cosmetic products, valued at €13.8 billion in 2018, followed by France (€11.4 billion), the UK (€10.9 billion), Italy (€10.1 billion) and Spain (€7 billion). In terms of products, skin care and toiletries occupy the largest share of the European market, with retail sales for both product groups worth approximately €20 billion in 2018.

In concrete to the **Portuguese market**, we can see that in 2018, (figure 7) Colgate and Nivea were the leading brands for health and beauty in Portugal, each
with approximately eight million consumer reach points. While Dodot and Evax ranked in third place, with four million consumer reach points.

According to *Statista*, in the Portuguese market, the revenue in the Cosmetics segment amounts to €126.5m in 2021. The market is expected to grow annually by 6.10% (CAGR 2021-2026). In global comparison, most revenue is generated in the United States (€12,121m in 2021). To conclude, in 2021, 53% of sales in the Cosmetics segment were expected to attribute to Luxury goods (Statista, 2021).

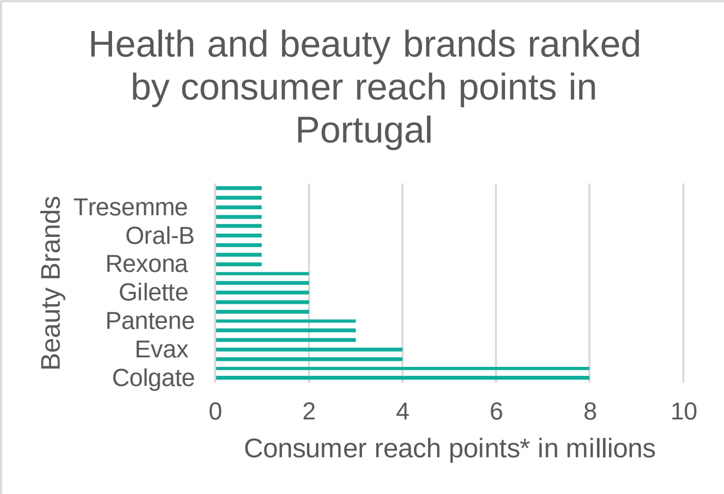


Figure 7 – Health and beauty brands ranked by consumer reach points in Portugal

Looking at the cosmetics market and more specifically at the dermo-cosmetics field, we can highlight the top 5 in **Portugal**: Klorane (18.5%), Ducray (15.2%), Bioderma (11.2%), René Furterer (8.4%) and La Roche Posay (7.9%). If we look at our neighbors, we can see that in Spain, Apivita ranks second with (9.4%) and ISDIN ranks fifth with (5.4%).

Throughout the **European market,** the countries that generate the most profit from bio and natural cosmetics brands are unlike France as the Top 1, followed by Germany and Austria. In this case, Portugal occupies 9th place (Pierre Fabre Data).

Looking still at the Portuguese market, we can say that Health & beauty sales reached €4.0 billion in 2019, and the sector is estimated to grow at a CAGR of 2.9% during 2018-2023, to reach €4.4 billion. The increasing importance of well-being & appearance among the younger generation, along with healthy lifestyles, are expected to drive big growth in this sector (Market Research.com).

Future of Cosmetic

Through this literature review, we were able to understand that the paradigm is no longer the same, several aspects led to the present situation in the cosmetic field, but it is also important to know what work still needs to be done in the future.

"Beauty is in the eye of the beholder" is a common phrase that can be interpreted in several ways. The cosmetic industry markets its products based on peoples' perceptions of beauty. Innovation is the key to success in the cosmetic industry. Over the years, the role of technology has allowed manufacturers to create a wide scheme of colors for lipstick, nail color, blush, etc. Technology has allowed companies to bottle thousands of different smells that make up the perfume business. To achieve a higher total margin to benefit all of them including consumers (Kumar et al., 2006).

The business has still many challenges to satisfy at intervals in the immediate future, like property sourcing of raw ingredients, energy consumption, waste management, and carbon footprint of the entire production chain – from manufacture to packaging, and distribution – biodegradability, and lack of human and environmental toxicity and company social responsibility in terms of inclusion, fairness, and equal opportunities (Acharya et al., 2021). Multiple cosmetic corporations are already implementing property practices into their supply chain, packaging, and ingredients. These selections will all have an everlasting impact on the mission to end deforestation, and animal extinctions, and also increased consumer desire for transparency regarding product ingredients (Acharya et al., 2021).

As the cosmetics industry is very large, and to ensure that the most accurate answers are taken out of the questionnaire, it was necessary to focus on three types of cosmetics: hair care, body care, and make-up (decorative cosmetics). Within each of these categories, the objective is to answer the following hypotheses:

- H1a: Sustainability has affected customer behavior when buying cosmetics.
- H2a: Covid-19 has affected customer behavior when buying cosmetics.
- H3a: E-commerce has affected customer behavior when buying cosmetics.
- H4a: Cruelty-free has affected customer behavior when buying cosmetics.

The results will tell not only if these variables have affected the consumer's behavior in the use of cosmetics, but also if the results of these same variables are different in the three categories in focus. The sample used to respond to the survey will be non-random sampling and more specifically using the convenience sample. The data analysis will be conducted with a qualitative type of analysis since there will only be analyzed the answers given by the respondents in the completed questionnaire.

Methodology

With the objective of understanding if these 4 variables: ***sustainability, cruelty-free, covid-19 pandemic, and e-commerce*** had and have an impact on consumer behavior change in the cosmetic sector, it was initiated the methodology phase. The methodology comes from the humanities and social sciences and can follow a qualitative or quantitative approach (Elliott, 2005). It is focused on the detailed stories or life experiences of a single event or a series of events for a small number of individuals (Creswell, 2007). The methodology is also the way to conduct research, it is the path of the investigation that is taking place. For this specific case, it was taken 2 paths: a quantitative and qualitative analysis.

Collect data

A variety of data may be collected including observation, participant diaries and letters, documentation, interviews, artifacts, and photographs help to provide a detailed contextualized story (Pettyet al., 2012). The data collected was primary, and it was decided to conduct a **Qualitative analysis** through an ***interview,*** made to four people that work in the cosmetic field. The script of the interview has been structured into 10 questions, each one of them tried to always approach the 4 variables of the study.

Interviews are used extensively in qualitative research as a method of data collection. Interviews may be structured, semi-structured, or unstructured (Robson, 2011). A structured interview will be like a questionnaire-type approach yielding a superficial level of response (Petty et al., 2012). We developed a semi-structured interview, with questions about these 5 variables and their importance in consumer behavior in the cosmetic field, considering that "The conduct of semi-structured interviews involves a few pre-determined areas of interest with possible prompts to help guide the conversation" (Pettyet al., 2012). Compared to quantitative research, data analysis in qualitative research can be a very time-consuming and laborious process.

A Quantitative approach was also taken into action through a ***survey,*** in this case with no restriction of people. The questionnaire was administered to 105 people without any type of pattern. It was created in Google Forms and was divided into 5 parts. The first part focused on the respondents' personal characteristics such as age, gender, level of education, and employment status. The second part is related to the type of consumer and the respondent's behavior when consuming cosmetics. The third part has to do with the features of cosmetics and the level of importance of each one of them to the respondent. Last, the fifth part is related to the effect of the covid-19 pandemic on the consumption of cosmetics in the respondents' lives.

In the quantitative research section of textbooks, authors correctly differentiate probability (i.e**.,** **random**) sampling designs from non-probability (**non-random**) sampling designs. Typically, four probability sampling designs are presented: simple random sampling, stratified random sampling, cluster random sampling, and systematic random sampling (Onwuegbuzie & Leech,2005).

While in the **interview,** the sample was of four people that work in the specific field of research making it a **non-random sampling**, it was an **intentional sampling** because it was known exactly what people were going to be interviewed. On the other hand, in the **survey,** the sample was larger, with more than 100 people, a **non-random sampling.** For **convenience,** the sample was taken from a group of people easy to contact or reach.

Data Analysis

Qualitative Methodology

Firstly, on a more qualitative approach, 4 people linked to the cosmetic sector were interviewed. The questions asked discussed the topics of analysis: e-commerce, cruelty-free, and sustainability. There were several conclusions that we could reach from the results, some more consistent than others.

In the first place, we can conclude that there is a growing male segment in the cosmetics industry, but it is still a niche.

In fact, all the answers have in common the idea that the male segment is growing, either because the demand and interest of this target are also increasing, because there is a greater awareness of the market, or even because it is an audience that is seen as loyal and, when buying, automatically becomes loyal and hardly changes.

In the case of the product manager of Àvene, Cátia Santos, she says that perhaps it is not the segment that is growing, but the segments that already exist that are amplified to answer this audience as well, that is, a form of communication is amplified both for men and for women.

Secondly, we can say that Skin Care is the main cosmetic category that consumers are looking for in the market.

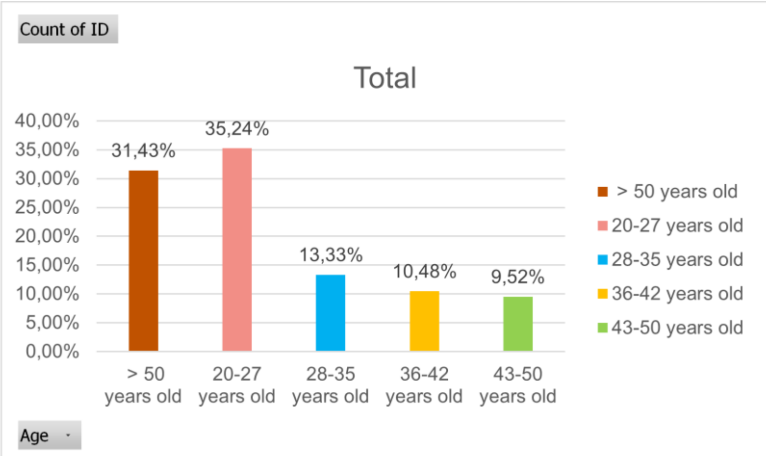
According to Adelaide Portela, Head of Marketing MC SONAE, this segment is the largest and where more brands have emerged, and therefore where consumers are most concentrated.
Also, within the skin care segment, we noticed that the anti-aging category is without a doubt the one with the greatest expression in terms of value, while in terms of units, acne is the most prominent category.
Thirdly, we realized that despite the growth of e-commerce offline purchases still have a higher weight.
Catarina Morgado, Product Manager of Ducray, says that the online store has grown exponentially, but that the physical store has not lost prominence, as there will always be 2 different channels to reach the consumer, each with its own space.
In fact, traditional channels still have great weight in terms of recommendation, as is the case with perfumeries, and pharmacies. Even more in the first purchase. When we have a re-purchase, the physicist will certainly lose a little, because the consumer already knows the product and just looks for the best price, whether online or in person.
Fourth, the demand for sustainable products has seen an increase. However, at the time of purchase, consumers still prefer more economical products to sustainable ones.
Consumers are looking for sustainable cosmetics, but they often do not know what they mean. On the other hand, they may also not buy it because they do not have the economic power to do so.
Tânia Fraga, product manager of René Furterer, says that sustainability continues to be a niche, despite being a “trend” that is here to stay. Also having into consideration, the economical panorama that we are living it is just easier to buy a cheaper product, that it is not sustainable, that will have the same results.
Fifth, cruelty-free is not a topic that takes a lot of attention from consumers nowadays, people feel secure when it comes to this question.
In Europe, there is a law that protects animals from being used for any type of cosmetic product test, so there is this guarantee and safety.
Six, COVID-19 was one of the main factors that had an impact on the cosmetic sector.
It has changed our local and global dermo-cosmetics sector, especially in online shopping. In the past, there was a small percentage of online consumption that, with the lockdown, generated a demand for online purchases.
The pandemic helped to reinforce trends that would already exist. They were only anticipated, as is the case of multi-channel, accessibility to information, internet, digital...
Lastly, the future of cosmetics will pass through disruptive products and artificial intelligence.

There will be more applications linked to augmented reality. 10 years from now, everything we have today will be even more computerized and the results will be even faster. Much of what already exists there, as is the case of Asia, will be reproduced here.
Neuroscience linked to cosmetics will be one of the big changes, and the idea will be that cosmetics should not change us, but respect who we are and improve us in some way.

Quantitative Methodology

Descriptive statistics

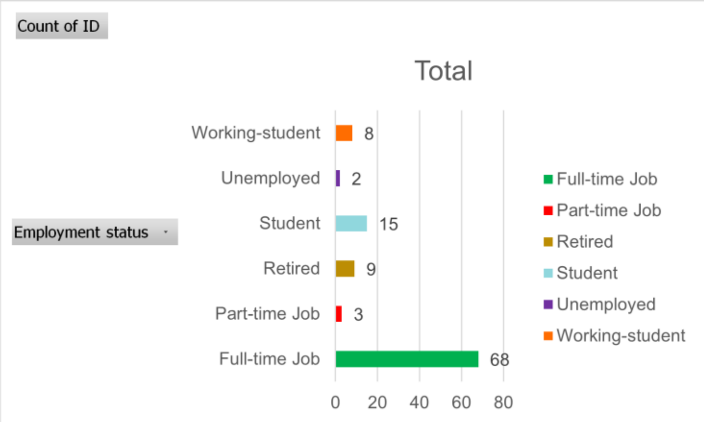
From the 105 responses collected, 76,1% were women and 23,8% were men, more precisely we had 80 women answering and 25 men.
Regarding **age,** the average of the respondents had 39 years old, representing 35,2% (37 people) of the respondents. The **majority** of people who answered the survey **had between 20-27 years old**, followed by 31,4% (33 people) who had more than 50 years old, 13,3% (14 people) between 28-35 years old, 10,5% (11 people) had between 36-42 years old and, lastly, 9,5% (10 people) had from 43-50 years old.



Graphic 1 – Age of the respondents (in age groups)

Having into consideration the **educational level** of the respondents, 44,2% (47 people) of the population are enrolled in **bachelor's programs**, 36,5% (38 people) are doing master's programs, 16,3% (17 people) are still in high school and only 2,9% (3 people) have a Ph.D. (more descriptive information is on figure B on the attachment).
When it comes to **employment status**, 65,4% are working as **full-time employees**,13,5% are still studying, 8,7% are retired, 2,9% are working in a part-time job and 1,9% are unemployed.

All the tables regarding these questions can be seen in the Appendix, to better understand the results. In the Bar Chart on the side (Graphic 2), we can see how people have answered in the survey to each of the categories. We can conclude regarding these criteria that **most of the respondents have full-time jobs right now.**



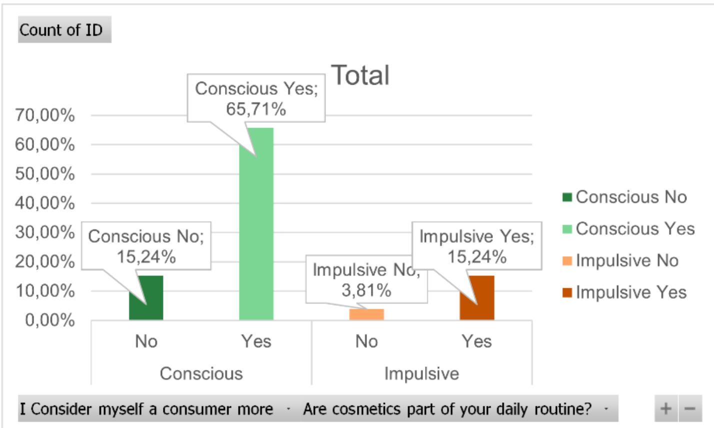
Graphic 2 – Employment Status of the Respondents

Analyze Data

CONSUMER BEHAVIOUR

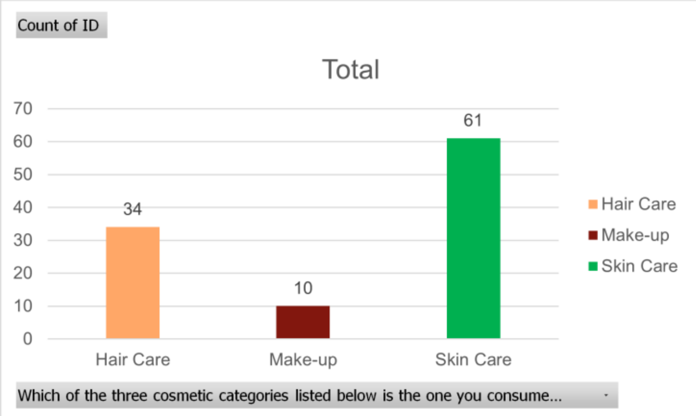
The second part of the survey focused on consumer behavior. From the 105 respondents, when asked if they consider themselves a more impulsive or conscious consumer: 81% (85 persons) answered they were **conscious** when buying something, while for the impulsive answer only 19% (20 persons) felt they were not conscious.

Another variable questioned in the survey was whether the cosmetics were part of daily routine, with the same results as the question before 81% said yes and 19% said no (both charters can be seen in the attachment).



Graphic 3 – Correlation of Conscious & Impulsive x Cosmetics part of daily routine

As these two questions gave the same values, we cross-sell them to see if there was any different information. This leads to the conclusion that a **big percentage of people who answered that was conscious, also use cosmetics in their daily routine, more precisely 65,71%**.



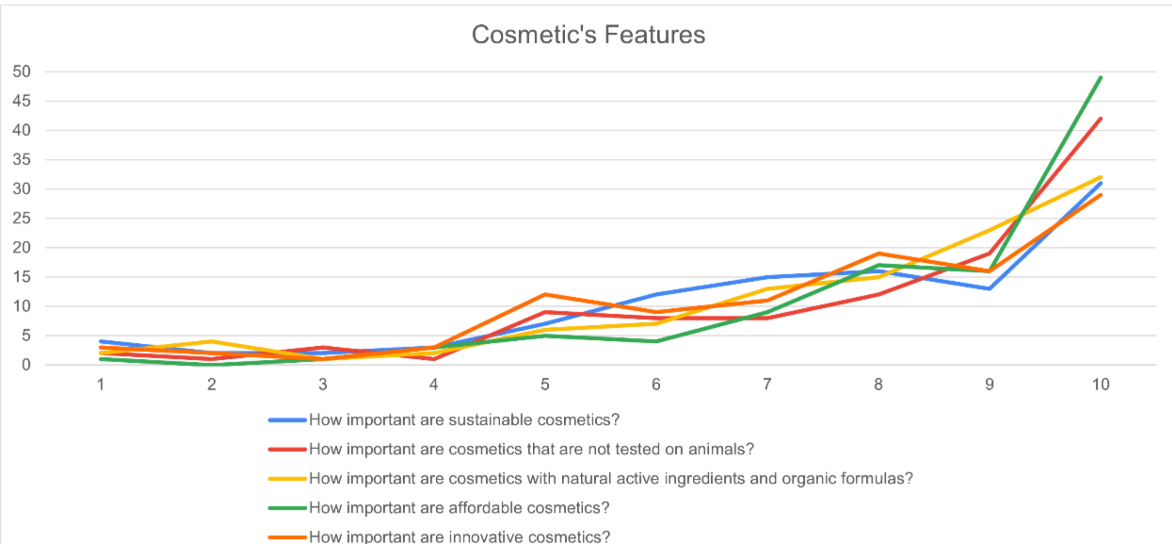
Graphic 4 – Categories of cosmetics more consumed

To the question *"How often do you buy cosmetics?"* a big part of the respondents answered every **2 months**, more precisely **39,4%** of the sample. **This information tells us that most people don't buy cosmetics that often…** 26% said rarely, and 25% do it once per month. Regarding the **three cosmetics categories** of the study, to the question *"Which of the three cosmetic categories listed below is the one you consume more?"* **57% answered skin care**, followed by 32,7% who prefer hair care and only 9,6% have chosen the make-up category (Graphic 4).

COSMETIC FEATURES

The third part of the survey analyses, from 1 to 10, the importance of each feature when buying a cosmetic, taking into consideration 5 different variables:

- *"How important are sustainable cosmetic products to you?"*
- *"How important are cosmetic products to you that are not tested on animals?"*
- *"How important are cosmetic products with natural active ingredients and organic formulas to you?"*
- *"How important are affordable cosmetic products to you?"*
- *"How important are innovative cosmetic products?"*

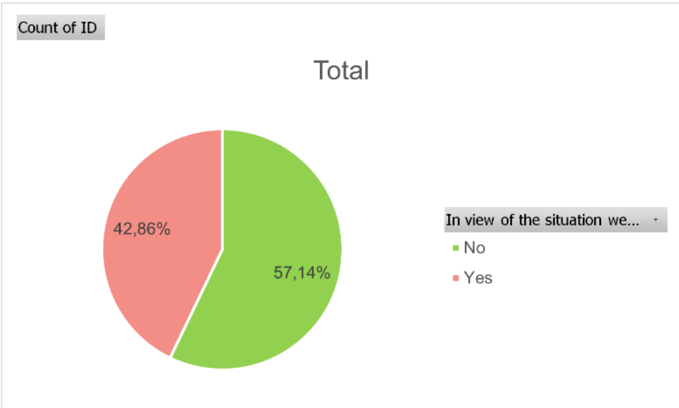


Graphic 5 – Correlation of all the cosmetic features

The results show that there was **not a big variance, with** similar answers between all. The scale of 10 didn't have any answers, but when correlating all these 5 variables, it was possible to understand that more people were putting the maximum value of scale in two specific characteristics. As we can see in the table below the green line correspond to the *"How important are affordable cosmetic products to you?"*, it is also the one with a higher altitude because it had more people answering 10 as the level of importance, more exactly, 49 people (46,7% of the sample). In the second place, the variable that had more people answering 10 as the value is *"How important are cosmetic products to you that are not tested on animals*?", with 42 people (40%). To better understand this question, in the table below, we associated all five (Graphic 5). In the attachment is, also, possible to find information regarding the five variables individually in the figures (F, G, H, I and J on the attachment).

COVID-19 PANDEMIC

In this fourth part, the aim was to point out if COVID-19 had an impact or not in the consumption of cosmetics. People were questioned whether *"In view of the situation we have experienced over the last two years, has COVID-19 had an impact on your consumption of cosmetic products?"* Most of the people **have answered "No"**, more precisely 57,14% (60 people) and 42,86% (45 people) have said there was a real impact on their consumption of cosmetics after COVID-19 (Graphic 6). As we analyze these results, we can confirm that COVID had an impact on a lot of aspects of our life, but when it comes to the cosmetic field, people continued to buy it. In fact, it is impossible to ignore that the number of people who answered "yes" is still considerable. This makes it hard to say with 100% confidence that if the sample was bigger the result would be the same.

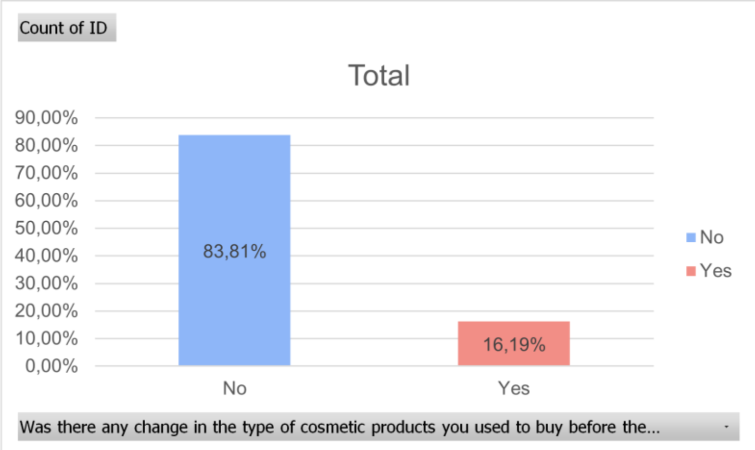


Graphic 6 – Impact of COVID-19 in the consumption of cosmetics

Still, due to the pandemic, people were asked *"Have you reduced your use of cosmetics due to the pandemic?"*. This answer was consistent with what they told in the question before, **61,9% of the respondents felt that nothing changed,** they have not reduced how they buy cosmetics… in fact 38,1% of the population have said the opposite. This tells us that people are more secure here to say that they didn't really feel any decrease compared when they were asked if there was a real impact. In the attachment is possible to see in the graphic 19 more details.

To conclude this fourth part when questioning people *"Was there any change in the type of cosmetic products you used to buy before the pandemic and now?"* for some surprise the majority of the people answered "No", they didn't buy any different type of cosmetics before and now… (Graphic 7) shows exactly the results obtained. 83,81% (88 people) have said "No" and only 16,19% (17 people) have said "Yes".

To the people who have answered "yes" was time to understand what type of products they had stopped buying and the ones they started using more. The most current answers for the cosmetic consumers were that they **stopped buying Make-Up** which in fact makes sense, because of chirurgic mask during COVID-19 this category had a big decrease in this last 2 years. But the category that people felt they start **buying more** was **skin care**, like: facial masks, serums, creams with colour and without. Some respondents have also mentioned not only the categories of products but the characteristics that they start looking more when buy a cosmetic and it was **affordability and the effectiveness.**

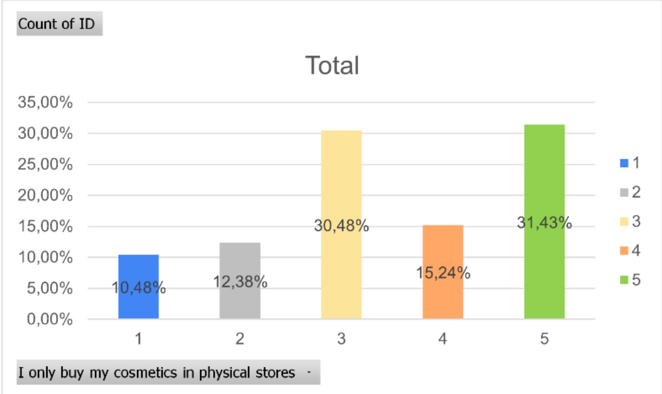


Graphic 7 – Change in the type of cosmetics bought before the pandemic and now

COVID-19 IMPACT

Arriving to the last part of the survey was important to get if the channels of consumption have changed due to the situation, that the world was living. Having in consideration a scale from 1 to 5, with 1 being "I completely disagree" and 5 being "I absolutely agree", people were asked to rank *"I only buy my cosmetic products online"*, most of the people "completely disagree", which tell us this affirmation is not true for the population, people don't buy only online, is possible to see this charter in the attachment (Graphic 28).

Another affirmation that was intended to know if it was true or not was *"I only buy my cosmetic products in physical stores"* in this case there was the opposite type of answer. Most of the people said they normally only buy in physical stores (31,43%), but despite that we had on a scale the number 3 with an approximated value (30,48%) so there are also people that said they do it but not always (Graphic 8).

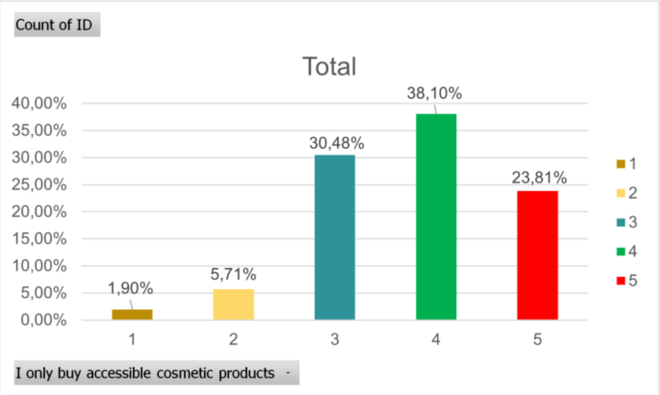


Graphic 8 – Only buying cosmetics in physical stores on a scale, from 1 being "completely disagree" and 5 "completely agree".

Regarding the phrase *"I only buy eco-friendly cosmetics "*on a scale from 1 to 5 most of the people have replied "3" (43,81%), which allows us to understand that both extremes, lower and higher, have not so much expression to people. The "4" had 21,90%, which is the number in the second place makes clear that there are more people who only try to buy eco-friendly cosmetics than the ones who don't (figure L in the attachment). For the affirmation *"I only buy cosmetics that are not tested on animals",* the same type of response was obtained. People are very concerned about it and make sure to buy cosmetics with this characteristic. As mentioned, in Europe, this is not a concern, but somehow people care about it. Therefore, the highest values are found between 3 and 5.

Comparing these two last affirmations, *"I only buy natural and organic cosmetic products" and "I only buy innovative and different cosmetic products"*, the biggest expression is found around 41% and 42%... leading to the understanding that people don't only buy organic and innovative cosmetics. There are still a mix of consumption and people end up not buying cosmetics with these characteristics.

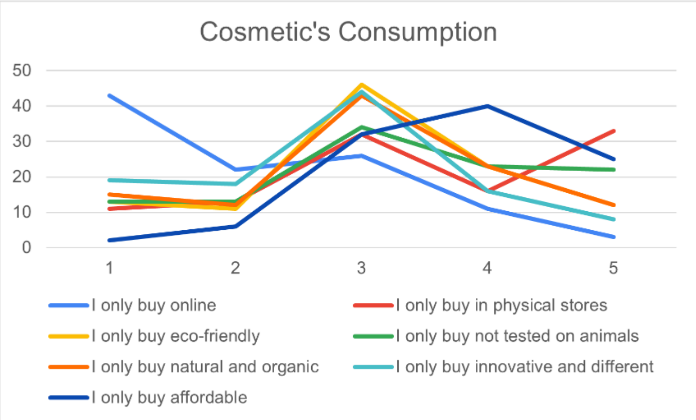
Lastly, the question *"I only buy affordable cosmetic products*" (Graphic 9) resulted in responses clearly more confident. Points 3 to 5 had a big expression leading to no doubt that people do always buy cosmetics that have a good price. Nowadays, this is even easier because of the larger offer given by the market.



Graphic 9 – Only buying cosmetics that are affordable on a scale from 1 being "completely disagree" and 5 "completely agree"

In the last paragraphs, we analyzed each of these characteristics individually, and how consumers behave in each one of them. Now, to make things clearer, in the chart below was done an association between them all and to see the main variances (Graphic 10).

Each color shows a different answer from the respondents. It is easy to understand that there is a **big concentration of all the lines in the number "3".** Remember that this question was made on a scale from 1 to 5 being 1 "I completely disagree" and 5 being "I absolutely agree".



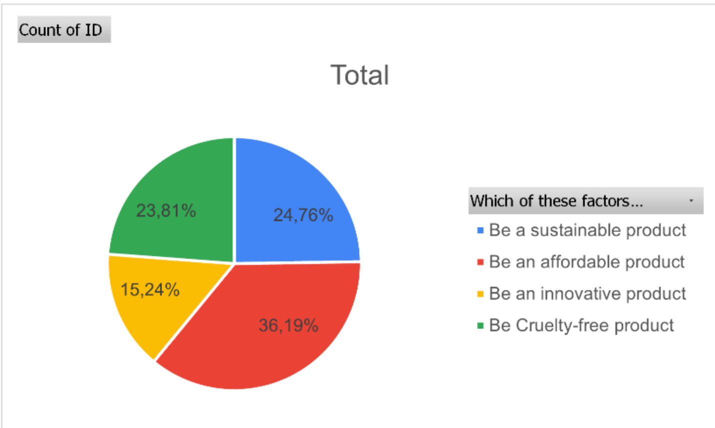
Graphic 10 – Correlation of all the variables on a scale from 1 being "completely disagree" and 5 "completely agree"

It is possible to observe that *"I only buy online"* has a discrepancy when compared to the other lines on level 1, which tell us that is the affirmation that people disagree more.

The final question of the survey aimed to understand *"Which of these factors would be decisive in the purchase of a cosmetic product?"* having in consideration 4 different characteristics: sustainability, cruelty-free, innovation, and affordable cosmetic (Graphic 11).

We can also observe a small change in the response to this question, regarding that these same characteristics were inquired individually on a scale from 1 to 5. While the scale question shows a big emphasis in first place for **affordable** and **cruelty-free** secondly. In this case, more people make sure to insist the most decisive factor is without a doubt the price (**affordable),** but the second factor is **sustainability** and not cruelty-free, so there is a change.

As the chart pie expresses, on the left side the numbers are clear. 36,19% of the responses are in the affordable product, and 24,76% are in the sustainable one.



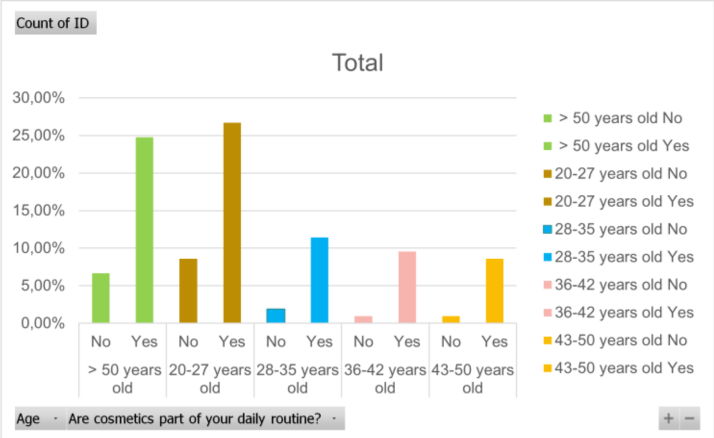
Graphic 11 – Decisive factor in the purchase of a cosmetic product.

Analyze Correlations

After having seen all the results of the survey, it was decided to conduct some correlations between variables also to have different and more useful information and to understand if we could glean any valuable data.

AGE & DAILY ROUTINE

On the first hand, it was decided to join the variable *"Age"* with the question *"Are cosmetics part of your daily routine?* To make it easier we divided the ages into five age categories, while the daily routine had responses of "yes" or "no". From the table that is available on the right side, it is possible to affirm that the two age groups *">50 years old"* and *"20-27 years old"* are the ones who tell they use more cosmetics on their daily routine (Graphic 12).

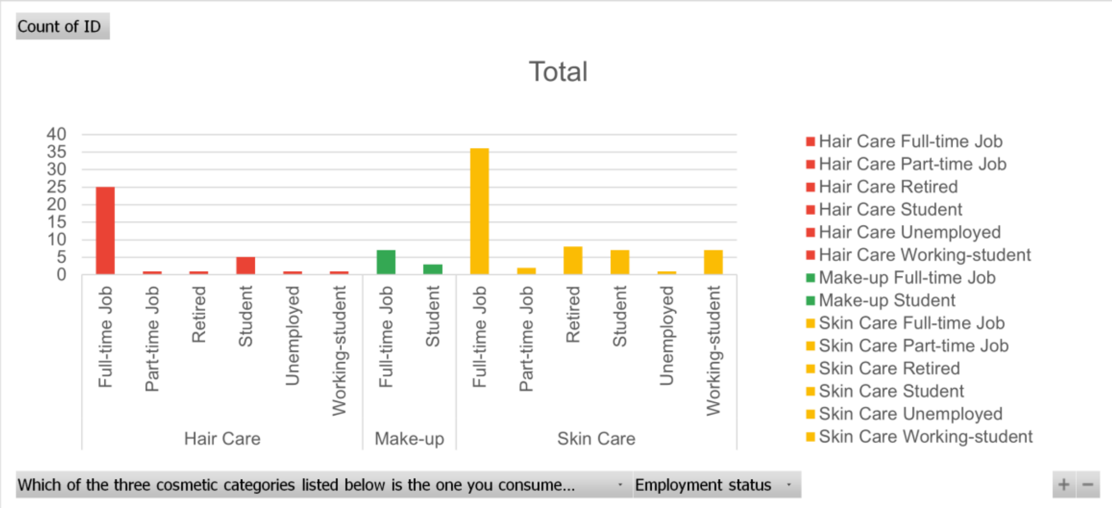


Graphic 12 – Correlation between "Age" and "If Cosmetics are part of the daily routine" of the respondents

EMPLOYMENT STATUS & CATEGORIES OF COSMETICS

The cross-selling of these two variables happens because there is an interest to understand if it exists a pattern of people who buy certain categories of cosmetics. Looking at the table, it is possible to witness that people who currently choose to consume **skin care products are usually the ones who have a full-time job** and the same happens in the hair care category people who work full-time jobs are the ones who have a higher value (Graphic 13).

This happens also because of the power of consumption to buy each one of the categories. Observing the make-up category, we witness a different effect, only "full-time job" and "students" appear, and the other employment status category doesn't buy so much these cosmetic products.



Graphic 13 – Correlation of "Employment Status" and "Cosmetic Categories More Consumed"

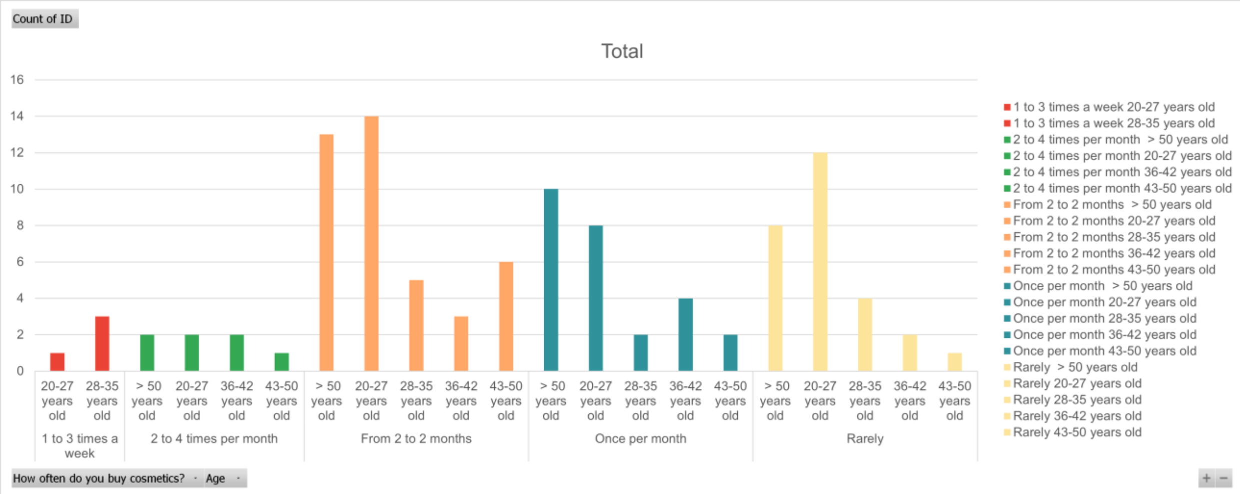
AGE & HOW OFTEN PEOPLE BUY COSMETICS

In this graphic, the association of the variable *"age*" and the variable "How often do you buy cosmetics?" makes it easier to understand if people who are younger buy cosmetics more regularly than others.

Considering the graphic below, it is possible to highlight two main age groups: *">50 years old"* and *"20-27 years old"*. The high values both age groups have is present in the frequency *"From 2 to 2 months" and "Rarely"*. Also, people who have *">50 years old"* buy cosmetics *"From 2 to 2 months"* but also "Once per month". This led us to understand that older people tend to buy cosmetics more frequently than those who are younger (Graphic 14).

Another thing that is also good to point out would be that frequency "1 to 3 times a week" regarding "how often do you buy cosmetics" have the young age group has the main respondent.

In conclusion, we can state that those **who are older buy cosmetics more frequently, than those who are younger, with a shorter interval of time.**



Graphic 14 – Correlation of "Age" X "How Often do you buy Cosmetics

Valid & Rejected Hypotheses

Hypotheses	*Rejected or Valided*	*Justification*
H1a: Sustainability has affected customer behaviour when buying cosmetics.	Rejected	Both in the survey and interviews we can understand that people care about this subject but **not enough** to make the conversion happen for products who are more sustainable.
H2a: Covid-19 has affected customer behaviour when buying cosmetics.	Validated	Pandemic **had an impact** because people even if they didn't feel they reduced the use of cosmetics, they started to buy different categories of cosmetics like skin care that was far behind in the past.
H3a: E-commerce has affected customer behaviour when buying cosmetics.	Validated	This new way of purchasing **was sure a motive** that affected customer behaviour, people start buying more products online and even more when it's a re-purchase.
H4a: Cruelty-free has affected customer behaviour when buying cosmetics	Rejected	Cruelty-free **didn't have** power to make any effect, this because people really trust the products and the laws we have nowadays established in Europe.

H1a: Sustainability has affected customer behavior when buying cosmetics

In the **questionnaire** carried out, on a scale from 1 to 10, the level of importance for sustainable cosmetic products did not have that much expression, when compared to other variables under study. On a scale from 1 “completely disagree” and 5 “completely agree” regarding the statement *“I only buy eco-friendly cosmetic products”*, most answers focused on 3, which does not position sustainability as a characteristic with great consistency.

On the 4 **interviews**, when asked *“Considera que nos dias de hoje há uma procura por parte dos consumidores por produtos sustentáveis, amigos do ambiente?”* the information obtained is that - *“Em todos os estudos do consumidor, o acontece é que o consumidor responde que prefere produtos amigos do ambiente e prefere produtos mais sustentáveis, no entanto na hora “H” quando tem de escolher um produto com uma pegada ecológico inferior ou um produto com mais eficácia ou recomendado por outra pessoa, o consumidor prefere sempre o outro produto que é mais barato ao sustentável.”* – Adelaide Portela.

H2a: Covid-19 has affected customer behavior when buying cosmetics.

In the survey when asked “Was there any change in the type of cosmetic products you used to buy before the pandemic and now?” most people said “no”. However, there was also a small percentage that told us that they had changed the type of cosmetics they bought. In fact, people stopped buying a lot of makeup and focused only on skin care products that were more effective and accessible.

In the interview, we also questioned *“Diria que a covid-19 mudou o tipo de cosméticos que a maioria consume e a regularidade com que o fazem, ou não concorda na sua totalidade com esta afirmação?”* the answers were quite similar to the information we have obtained from the survey – *“…não acho que tenha havido um crescimento, o que houve sim, foi uma alteração do tipo de categoria, os fenómenos relacionados com maquilhagem, vernizes, etc…*” – Tânia Fraga.

H3a: E-commerce has affected customer behavior when buying cosmetics.

This variable was also much discussed throughout the thesis. In the **survey**, based on a scale of 1 to 5, with 1 being "completely disagree" and 5 "completely agree", the sample was asked *“if they only buy cosmetic products online”* and the majority does not agree. When said *“if they only buy products in physical stores”*, the values were already more inclined towards 3 and 5. In this way, the physical continues to win, although we see an increase in the online.

In the **interviews**, when asked if *"Sente que hoje em dia há uma evidência clara dos consumidores, pelo consumo de cosméticos online, ou ainda existe um largo regime hibrido?"* the answers were consistent – "online é muito mais apelativo, mas ainda há um grande peso híbrido. Ainda há um grande peso da recomendação, sobretudo nos canais profissionais como é o caso das perfumarias, farmácias…"- Adelaide Portela

H4a: Cruelty-free has affected customer behavior when buying cosmetics

When asked in the **questionnaire** if people felt it was important *"products that were not tested on animals"* on a scale from 1 to 10, with being 10 the highest value of importance. This variable had a big number of respondents in the maximum value. In fact, it was the second characteristic people considered more important in a cosmetic, only after affordability.

Also, regarding the question *"What is the decisive factor in the purchase of a cosmetic product?"* the cruelty-free did not have such a large expression, reaching third place, after affordability and sustainability, which show a small interest from the responders.

In the **interviews,** it was asked if ***"**Considera que nos dias hoje há uma procura por parte dos consumidores por cosméticos que não sejam testados em animais?"* this was some of the content that was taken – "não há um grande preocupação do consumidor por esta temática… é um nicho que se preocupa com este tipo de assunto." – Tânia Fraga

Conclusions

Like any other thesis, we end up with more answers than the initials. The objective has always been to understand the changes in consumer behavior in the cosmetic sector, by analyzing each of the possible factors and understanding if there was really any change. We also seek to know if COVID-19 had any impact on this same field of consumption.
Four permissions were defined, and we can now conclude whether they had any impact or not in consumer behavior.

1.1 - Main Conclusions

Sustainability

From all the interviews and survey done, it's clear that what people say and what people do are different. Sustainability is a subject that has become a "trend" in consumers' minds. People like to be a part of what is cool and even better if they are helping the planet, despite when it comes to buy the real product, they still don't put the sustainability aspect in the first place, in fact people end up always choosing what is cheaper and have the same effectiveness.
For all this, we can conclude that: **H1o: Sustainability has not affected customer behavior when buying cosmetics**. **Also, each one of the three categories (hair care, skin care, and make-up) did not see any variation that leads to conclude there was any change in consumer behavior.**

COVID-19

Having in consideration the two instruments used to extract information: survey and interviews, COVID-19 was a unique context for the world but regarding what was expected the frequency of consumption of cosmetics did not decrease that much, in fact, what was seen is a significant change in the type of cosmetics people usually bought and what they do buy now. Make-up has disappeared from the consumers wallets and skin care has become "the" cosmetic category of the moment. **H2a: Covid-19 has affected customer behavior when buying cosmetics. Regarding the three categories of the study, we see that hair care and make-up were left behind and the skin care is winning more space in the market.**

E-Commerce

When analyzing the e-commerce aspect, the answers in the interviews as well as the ones of the respondents in the survey were consistent and clear. The online consumption is nowadays a big piece of the percentage of sales in the cosmetic industry, people like to buy online and even more when they are familiar with the product, but still traditional channels continue to be on the front line. So, we can clearly see physical stores winning in weight of sales, but the e-commerce was a game changer, and the numbers also express that.

In this way, **H3a: E-commerce has affected behavior when buying cosmetics. In the three categories, we can say there is not one specific that is more bought online, they all perform that way, except in re-buy situations.**

Cruelty-Free

For this last aspect – Cruelty-free, the information obtained tells that consumers don't really care about this subject in their daily life of consumption. People consider this important, but they don't try to search for Cruelty-free information about a product and this can be a result of the law that is implemented in Europe that forbidden any use of cosmetics that was tested in animals. Considering all this information acquired it's safe to say that**: H4o: Cruelty-free has not affected customer behavior when buying cosmetics. Related to the categories of cosmetics under analysis, there is not one that must be highlighted since they have all the same variance regarding the cruelty-free aspect.**

1.2 Theoretical and managerial implications

Since all the realization of the thesis was done in a post-covid period, where fear and some distrust prevailed, it became impossible to do the qualitative analysis in person, which in my opinion, would have been a totally different and more enriching experience.

Also, in the theoretical analysis itself, this new reality that is "Covid-19 Pandemic" was considered, in my view, important to be a big part of the investigation. Having this perspective of the pandemic panorama in the thesis and the implications it had for the subject that was being studied, made all the process and results look even more near of what is the reality of the cosmetic industry these days.

Finally, in data analysis the statistical part could have been something more present when rejecting or validating all the hypotheses.

1.3 Limitations and future research

Regarding the limitations of the thesis, during the literary review it became more difficult to find reports with sufficiently consistent credible information on the topic of COVID-19 in the cosmetic industry.

The reason for this to happened is due to the temporal space that preceded this thesis, it turns out to be a panorama and a reality quite recently, so there wasn’t still enough time for a more careful and complete analysis on the subject. One of the other obstacles experienced was during the qualitative approach, through interviews specially, as much as I wanted to reach people so that they give their testimony, it is not always easy, often because people do not have the "time" and “availability” to participate as part of the process and to give their side of the story.

Last, one of the limitations was also the type of sample obtained in the survey carried out, most of the answers were from people young and with ages really close to each other. In the future I should look for a different type of sample, a universe that can be more diversified and even larger so that my results are, also, more credible, and stronger.

Bibliography

- Acharya, S., Bali, S., & Bhatia, B. S. (2021, February). Exploring Consumer Behaviour towards Sustainability of Green Cosmetics. In 2021 International Conference on Advances in Electrical, Computing, Communication and Sustainable Technologies (ICAECT) (pp. 1-6). IEEE.
- Amberg, N., & Fogarassy, C. (2019). Green consumer behaviour in the cosmetics market. Resources, 8(3), 137.
- Amin, N., & Mohd Nor, R. (2013). Online shopping in Malaysia: Legal Protection for E-consumers. European Journal of Business and Management, 5(24), 79-86.
- Ariffin, S. K., Mohan, T., & Goh, Y. N. (2018). Influence of consumers' perceived risk on consumers' online purchase intention. Journal of Research in Interactive Marketing.
- Beatty, S. E., & Ferrell, M. E. (1998). Impulse buying: Modeling its precursors. Journal of retailing, 74(2), 169-191.
- Cawthray, B. (2020, December 10). Beauty & personal care: when will the healthy glow return? Kantar. https://www.kantar.com/inspiration/consumer/beauty-and-personal-care-when-will-the-healthy-glow-return
- Cetină, I., Munthiu, M. C., & Rădulescu, V. (2012). Psychological and social factors that influence online consumer behavior. Procedia-Social and Behavioral Sciences, 62, 184-188.
- Crettaz von Roten, F. (2008). Mapping perceptions of animal experimentation: trend and explanatory factors. Social Science Quarterly, 89(2), 537-549.
- Cosmetics Europe. (2019, June). Socio-Economic Contribution of the European Cosmetics Industry. https://www.cosmeticseurope.eu/files/4715/6023/8405/Socio-Economic_Contribution_of_the_European_Cosmetics_Industry_Report_2019.pdf
- Cosmetics Products. (n.d.). Cosmetics Europe. https://cosmeticseurope.eu/cosmetic-products/
- Diamantopoulos, F. N. (2020). The impact of digital advertising on the marketing of consumers' products for Kotsovolos company.
- Eger, L., Komárková, L., Egerová, D., & Mičík, M. (2021). The effect of COVID-19 on consumer shopping behaviour: Generational cohort perspective. Journal of Retailing and Consumer Services, 61, 102542

- Elliott, J. (2005). Using narrative in social research: Qualitative and quantitative approaches. Sage.
- Fabro, N. (2019, December 19). Testes com animais no Brasil podem acabar em breve? Galileu. https://revistagalileu.globo.com/Ciencia/noticia/2019/12/testes-com-animais-no-brasil-podem-acabar-em-breve.html
- Galadari, H., Gupta, A., Kroumpouzos, G., Kassir, M., Rudnicka, L., Lotti, T., Berg R.V & Goldust, M. (2020). COVID 19 and its impact on cosmetic dermatology. Dermatologic Therapy.
- Gómez-Corona, C., Rakotosamimanana, V. R., Sáenz-Navajas, M. P., Rodrigues, H., Franco-Luesma, E., Saldaña, E., & Valentin, D. (2021). To fear the unknown: Covid-19 confinement, fear, and food choice. Food Quality and Preference, 92, 104251.
- Guthrie, C., Fosso-Wamba, S., & Arnaud, J. B. (2021). Online consumer resilience during a pandemic: An exploratory study of e-commerce behavior before, during and after a COVID-19 lockdown. Journal of Retailing and Consumer Services, 61, 102570.
- Hesham, F., Riadh, H., & Sihem, N. K. (2021). What have we learned about the effects of the COVID-19 pandemic on consumer behavior?. Sustainability, 13(8), 4304.
- Instituto Nacional de Estatística (INE). (2021, November 22). *There are more e commerce users, mostly women - 2021* [Dataset] https://www.ine.pt/xportal/xmain?xpid=INE&xpgid=ine_destaques&DESTAQUESdest_boui=473557834&DESTAQUESmodo=2
- Irene, S. M. (2019). Consumer behaviour and new consumer trends vis-à-vis the ICTs. *Esic Market Economics and Business Journal*, *50*(3), 599-620.
- Jílková, P., & Králová, P. (2021). Digital Consumer Behaviour and eCommerce Trends during the COVID-19 Crisis. International Advances in Economic Research, 27(1), 83-85.
- Kalyani, M. S. R. (2021). Impact of Covid-19 on Personal Care Products in India: a Study with Special Reference to Beauty and Cosmetic Products and Personal Hygiene Products. JournalNX, 7(02), 39-44.
- Karimi, S., Holland, C. P., & Papamichail, K. N. (2018). The impact of consumer archetypes on online purchase decision-making processes and outcomes: A behavioural process perspective. Journal of Business Research, 91, 71-82.

- Karimi, S., Papamichail, K. N., & Holland, C. P. (2015). The effect of prior knowledge and decision-making style on the online purchase decision-making process: A typology of consumer shopping behaviour. Decision Support Systems, 77, 137-147.
- Kumar, S. (2005). Exploratory analysis of global cosmetic industry: major players, technology, and market trends. Technovation, 25(11), 1263-1272.
- Kumar, S., Massie, C., & Dumonceaux, M. D. (2006). Comparative innovative business strategies of major players in cosmetic industry. Industrial Management & Data Systems.
- LaBarbera, P. A., & Mazursky, D. (1983). A longitudinal assessment of consumer satisfaction/dissatisfaction: the dynamic aspect of the cognitive process. Journal of marketing research, 20(4), 393-404.
- Li, D., Wang, C. L., Jiang, Y., Barnes, B. R., & Zhang, H. (2014). The asymmetric influence of cognitive and affective country image on rational and experiential purchases. European Journal of Marketing.
- Lima, M. J. (2021, September 30). Kantar define 5 novos clusters de consumidores. Marketeer. https://marketeer.sapo.pt/kantar-define-5-novos-clusters-de-consumidores/
- Lo, C. L., & Tseng, H. T. (2021). The Role of Self-Congruence, Marketing Models, and Product Conspicuousness in college Students ‘online cosmetics shopping. Journal of Electronic Commerce Research, 22(1), 76-94.
- Łopaciuk, A., & Łoboda, M. (2013, June). Global beauty industry trends in the 21st century. In Management, knowledge and learning international conference (pp. 19-21).
- McKinney, V., Yoon, K., & Zahedi, F. M. (2002). The measurement of web-customer satisfaction: An expectation and disconfirmation approach. Information systems research, 13(3), 296-315.
- Min Chung Han & Youjeong Kim (2017) Why Consumers Hesitate to Shop Online: Perceived Risk and Product Involvement on Taobao.com, Journal of Promotion Management, 23:1, 24-44, DOI: 10.1080/10496491.2016.1251530
- Marahatta, S., Singh, A., & Pyakurel, P. (2021). Self-cosmetic care during the COVID-19 pandemic and its psychological impacts: Facts behind the closed doors. Journal of Cosmetic Dermatology
- Mautino, B. (2018). Il trucco c’è e si vede (1st ed.). Gruppo editoriale Mauri Spagnol.

- Morganti, P., Morganti, G., Gagliardini, A., & Lohani, A. (2021). From cosmetics to innovative cosmeceuticals—non-woven tissues as new biodegradable carriers. Cosmetics, 8(3), 65.
- Nguyen, L., Le, H. C., & Nguyen, T. T. (2021). Critical Factors Influencing Consumer Online Purchase Intention for Cosmetics and Personal Care Products in Vietnam. The Journal of Asian Finance, Economics and Business, 8(9), 131-141.
- Nikodemska-Wołowik, A. M., Bednarz, J., & Foreman, J. R. (2019). Trends In Young Consumers'behaviour–Implications For Family Enterprises. *Economics & Sociology*, *12*(3), 11-24.
- Nielson. (2021, June 25). É altura de entrar na próxima fase de crescimento do e-commerce na Europa [Dataset]. https://nielseniq.com/global/pt/insights/analysis/2021/e-altura-de-entrar-na-proxima-fase-de-crescimento-do-e-commerce-na-europa/
- Nogueira, S. (2021, August 4). Novas tendências no comportamento do consumidor. Marketeer.https://marketeer.sapo.pt/novas-tendencias-no-comportamento-do-consumidor/
- Ornell, F. E. L. I. P. E., Schuch, J. B., Sordi, A. O., & Kessler, F. H. P. (2020). Pandemia de medo e Covid-19: impacto na saúde mental e possíveis estratégias. Debates em Psiquiatria, 10(2), 12-16.
- Park, I., Lee, J., Lee, D., Lee, C., & Chung, W. Y. (2022). Changes in consumption patterns during the COVID-19 pandemic: Analyzing the revenge spending motivations of different emotional groups. Journal of Retailing and Consumer Services, 65, 102874.
- Paynter, J., & Lim, J. (2001). Drivers and impediments to e-commerce in Malaysia. Malaysian Journal of Library & Information Science, 6(2), 1-19.
- Petty, N. J., Thomson, O. P., & Stew, G. (2012). Ready for a paradigm shift? Part 2: Introducing qualitative research methodologies and methods. *Manual therapy*, *17*(5), 378-384
- Pikoos, T. D., Buzwell, S., Sharp, G., & Rossell, S. L. (2020). The COVID-19 pandemic: Psychological and behavioral responses to the shutdown of the beauty industry. International Journal of Eating Disorders, 53(12), 1993-2002.
- Pistollato, F., Madia, F., Corvi, R., Munn, S., Grignard, E., Paini, A., Worth.A., …& Zuang, V. (2021). Current EU regulatory requirements for the assessment of chemicals

and cosmetic products: challenges and opportunities for introducing new approach methodologies. Archives of Toxicology, 1-31.

- Porto, S. (2021). Os homens são o novo alvo das empresas cosméticas. SOL. https://sol.sapo.pt/artigo/742237/os-homens-sao-o-novo-alvo-das-empresas-cosmeticas
- Ramli, N. S. (2015). Immigrant entrepreneurs on the world's successful global brands in the cosmetic industry. Procedia-Social and Behavioral Sciences, 195, 113-122.
- Research and Markets. (2020, April 15). Impact of COVID-19 on the Global Cosmetic Industry[Dataset].https://www.globenewswire.com/newsrelease/2020/04/15/2016351/0/en/Impact-of-COVID-19-on-the-Global-Cosmetic-Industry.html
- Santos, R. (2020, October 8). Que comportamentos dos consumidores irão perdurar para além da pandemia? Marketeer. https://marketeer.sapo.pt/que-comportamentos-dos-consumidores-irao-perdurar-para-alem-da-pandemia/
- Sequeira, A. (2021, December 22). 8 marcas de cosmética portuguesas que precisa de conhecer.Miranda.https://miranda.sapo.pt/outras-coisas/artigos/8-marcas-de-cosmetica-portuguesas-que-precisa-de-conhecer
- Sheth, J. (2020). Impact of Covid-19 on consumer behavior: Will the old habits return or die?. *Journal of business research*, *117*, 280-283.
- Singh, S., & Aggarwal, Y. (2021). In search of a consensus definition of innovation: a qualitative synthesis of 208 definitions using grounded theory approach. Innovation: The European Journal of Social Science Research, 1-19.
- Statista.(2021).CosmeticsPortugal[Dataset].https://www.statista.com/outlook/cmo/beauty-personal-care/cosmetics/portugal?currency=EUR
- Vázquez-Martínez, U. J., Morales-Mediano, J., & Leal-Rodríguez, A. L. (2021). The impact of the COVID-19 crisis on consumer purchasing motivation and behavior. European Research on Management and Business Economics, 27(3), 100166.
- Vecino, X., Cruz, J. M., Moldes, A. B., & Rodrigues, L. R. (2017). Biosurfactants in cosmetic formulations: trends and challenges. Critical reviews in biotechnology, 37(7), 911-923.
- Veselovská, L., Závadský, J., & Bartková, L. (2021). Consumer behaviour changes during times of the covid-19 pandemic: an empirical study on Slovak consumers.

- Vinardell, M. P. (2015). The use of non-animal alternatives in the safety evaluations of cosmetics ingredients by the Scientific Committee on Consumer Safety (SCCS). Regulatory Toxicology and Pharmacology, 71(2), 198-204.
- Winders, D. J. (2006). Combining reflexive law and false advertising law to standardize cruelty-free labeling of cosmetics. NYUL Rev., 81, 454.

Annexes

SCRIPT INTERVIEWS

1. Como definiria o setor cosmético nos dias de hoje (de um modo geral, o que os consumidores procuram, os desafios do mercado, etc.)?
2. Há um claro interesse da indústria cosmética pelo público feminino ou sente que isso está a mudar? Sente que o segmento para os homens está a crescer?
3. Na sua opinião que tipo de produtos cosméticos os consumidores mais procuram (tendo em conta as 7 categorias cosméticas: body care, hair care, makeup, perfume, oral care, skin care, sun care)?
4. Se pudesse referir 3 grandes fatores que levaram a uma mudança no setor cosmético, quais seriam? E porquê?
5. Sente que hoje em dia há uma evidência clara dos consumidores pelo consumo de cosméticos online, ou ainda existe um largo regime híbrido?
6. Considera que nos dias de hoje há uma procura por parte dos consumidores por produtos sustentáveis, amigos do ambiente (feito de materiais reciclados, circuito de produção curta, redução do desperdício de água na sua produção)?
7. Considera que nos dias hoje há uma procura por parte dos consumidores por cosméticos que não sejam testados em animais (tendo em conta um panorama mais global e não nacional)?
8. Considera que nos dias hoje há uma procura por parte dos consumidores por cosméticos que tenham ingredientes ativos naturais e com fórmulas bio?
9. Diria que a COVID-19 mudou o tipo de cosméticos que a maioria consome e a regularidade com que o fazem, ou não concorda na sua totalidade com esta afirmação?
10. Por último, onde vê a indústria cosmética daqui a 10 anos? Na sua opinião, quais serão as maiores tendências, o que o consumidor vai procurar e o que o mercado vai oferecer?

Interviews

Catarina Morgado – Brand Manager Ducray – Pierre Fabre

1. Como definiria o setor cosmético nos dias de hoje (de um modo geral, o que os consumidores procuram, os desafios do mercado, etc.)?

O setor cosmético é atualmente um mercado altamente competitivo, em que o consumidor se tornou mais exigente nos últimos anos pelo fácil acesso à informação. Novas marcas surgiram, novos ativos e também muita informação não verosímil. As farmácias passaram a ter um papel com mais destaque no setor cosmético, exatamente por surgir a necessidade de um aconselhamento correto e adaptado a cada consumidor.

2. Há um claro interesse da indústria cosmética pelo público feminino ou sente que isso está a mudar? Sente que o segmento para os homens está a crescer?

Há um claro interesse pelo público feminino por uma razão cultural e de género. No entanto, o segmento masculino está claramente a crescer porque o interesse/procura também está a aumentar.

3. Na sua opinião, que tipo de produtos cosméticos os consumidores mais procuram (tendo em conta as 7 categorias cosméticas: body care, hair care, makeup, perfume, oral care, skin care, sun care)?

O segmento de *skin care* é o mais significativo, nomeadamente o segmento de rosto que apresenta uma dinâmica muito interessante. Por outro lado, os capilares também têm um crescimento dos suplementos alimentares utilizados para melhorar a saúde do cabelo.

4. Se pudesse referir 3 grandes fatores que levaram a uma mudança no setor cosmético, quais seriam? E porquê?

Questões ambientais, igualdade de género, consumidores mais informados e exigentes.

5. Sente que hoje em dia há uma evidência clara dos consumidores, pelo consumo de cosméticos online, ou ainda existe um largo regime híbrido?

O *online* está claramente em crescimento exponencial, mas a loja física não perdeu protagonismo, nem vai perder se se souber adaptar a uma nova realidade. São 2 canais distintos de venda e de chegar ao consumidor e cada um tem o seu espaço.

6. Considera que nos dias de hoje há uma procura por parte dos consumidores por produtos sustentáveis, amigos do ambiente (feito de materiais reciclados, circuito de produção curta, redução do desperdício de água na sua produção)?

Penso que sim, no entanto acho que a maior parte das pessoas não sabe bem o que isso significa ou, por outro lado, além de não saber, não tem poder económico para adquirir esse tipo de produtos.

7. Considera que nos dias hoje há uma procura por parte dos consumidores por cosméticos que não sejam testados em animais (tendo em conta um panorama mais global e não nacional)?

Claro que sim. Acho que é claramente um fator-chave e ainda bem que o é.

8. Considera que nos dias hoje há uma procura por parte dos consumidores por cosméticos que tenham ingredientes ativos naturais e com fórmulas bio?

Diria que sim. No entanto, ainda há muita desinformação sobre o tema, o que leva a que muitas marcas se acabem por aproveitar dessa mesma "ausência de informação".

9. Diria que a COVID-19 mudou o tipo de cosméticos que a maioria consume e a regularidade com que o fazem, ou não concorda na sua totalidade com esta afirmação?

Isso depende muito, porque na cosmética não existe só um segmento, existem segmentos de luxo, *eco-friendly*, os de farmácia, a cosmética mais acessível no *mass market* e ainda segmentos que surgem apenas no *online*. Com esta diversidade de canais e de consumidores é difícil estabelecer um padrão.

No entanto, podemos dizer que logo a seguir à pandemia, sim, isso aconteceu. Contudo, parece que com o passar do tempo as pessoas tendem a esquecer-se e a voltar ao mesmo tipo de consumo que era feito no pré-covid.

10. Por último, onde vê a indústria cosmética daqui a 10 anos? Na sua opinião, quais serão as maiores tendências, o que o consumidor vai procurar e o que o mercado vai oferecer?

Sem dúvida que será uma indústria que apostará em *Packagings* diferenciadores e fórmulas inovadoras, são estes as duas tendências que considero mais relevantes e vão passar a fazer parte do mercado daqui a uns anos.

Adelaide Portela – Head of Marketing New Businesses Health & Wellness – MC SONAE

1. Como definiria o setor cosmético nos dias de hoje (de um modo geral, o que os consumidores procuram, os desafios do mercado, etc.)?

As marcas tradicionais clássicas estão a atravessar uma espécie de crise, é um setor cada vez mais democrático e em que o consumidor é cada vez menos fiel às marcas clássicas. Antigamente liderado apenas pela L'Oréal, e o que temos vindo a ver é que surgem cada vez mais marcas de produtores desconhecidos, boas promessas de valor que surgem de marcas "Indie" que acabam por conquistar o mercado, muito também com comunicações focadas nos media e na geração Z, que acabam por alterar o panorama e conquistar uma grande franja de consumidores às marcas. Este crescimento das marcas "Indie" de produtores independentes revela a queda das marcas tidas como clássicas. Isto porque as marcas mais Indie surgem com preços mais apelativos, como é o exemplo: The ordinary e Druk Elephant.

2. Há um claro interesse da indústria cosmética pelo público feminino ou sente que isso está a mudar? Sente o segmento para os homens está a crescer?

Sim, há um crescimento do público masculino, há uma sensibilização muito maior. Contudo, ainda é um mercado pequeno e de nicho. No entanto, surgem cada vez mais opções e as marcas estão a posicionar-se para terem produtos para homem, não apenas da barba, que foi como começou, mas também maquilhagem, como é o caso da Channel que lançou uma linha de maquilhagem masculina.

3. Na sua opinião que tipo de produtos cosméticos os consumidores mais procuram (tendo em conta as 7 categorias cosméticas: body care, hair care, makeup, perfume, oral care, skin care, sun care)?

Skin care, pois é a categoria de maior dimensão e onde surgiram mais marcas.

4. Se pudesse referir 3 grandes fatores que levaram a uma mudança no setor cosmético, quais seriam? E porquê?

O primeiro que me vem à cabeça é a **digitalização,** que nos permitiu ter acesso a tudo e ter o mundo na palma das mãos. A digitalização engloba uma oferta cada vez maior de cada vez mais marcas e o ***e-commerce***, eu não só sou impactada por outras marcas, mas como posso mandar vir produtos de marcas que não há à venda em Portugal. Isto porque permitiu a democratização dos preços e aumentou a concorrência e fez com que possa comprar mais produtos, mais tendências e ter novas necessidades de beleza que não teria há uns anos atrás.

5. Sente que hoje em dia há uma evidência clara dos consumidores, pelo consumo de cosméticos online, ou ainda existe um largo regime híbrido?

Nas novas gerações o *online* é muito mais apelativo, mas ainda há um grande peso híbrido. O setor cosmético é dos que mais cresce *online*, mas se nós virmos o peso das vendas *online* *versus* o peso das vendas nos canais tradicionais, ainda é muito maior o peso nos canais tradicionais. Ainda há um grande peso da recomendação, sobretudo nos canais profissionais como é o caso das perfumarias, farmácias…

6. Considera que nos dias de hoje há uma procura por parte dos consumidores por produtos sustentáveis, amigos do ambiente (feitos de materiais reciclados, circuito de produção curta, redução do desperdício de água na sua produção)?

Em todos os estudos do consumidor, o acontece é que o consumidor responde que prefere produtos amigos do ambiente e prefere produtos mais sustentáveis. No entanto, na hora "H" quando tem de escolher um produto com uma pegada ecológico inferior ou um produto com mais eficácia ou recomendado por outra pessoa, o consumidor prefere sempre o outro produto que seja mais barato o que o sustentável. Por esse motivo, há uma responsabilidade da marca de apostarem neste lado sustentável, pois se no final do dia o preço for o mesmo e a promessa de valor e eficácia igual, então aí vão escolher um produto sustentável. Contudo, o preço ainda é um grande "obstáculo" à sustentabilidade.

7. Considera que nos dias hoje há uma procura por parte dos consumidores por cosméticos que não sejam testados em animais (tendo em conta um panorama mais global e não nacional)?

Na Europa é proibido vender produtos testados em animais, pelo que todas marcas que conhecemos no mercado português não o fazem. Hoje em dia, não é permitido no *packging* dizer "Não foi testado em Animais", isto porque não se pode legalmente testar em animais. Ou no mercado português já é uma garantia os cosméticos não testados em animais.

8. Considera que nos dias hoje há uma procura por parte dos consumidores por cosméticos que tenham ingredientes ativos naturais e com fórmulas bio?

Vai depender da tipologia de consumidor e da idade, ou seja, uma consumidora que procura produtos anti-idade, vai preferir um produto eficaz, ou seja com uma promessa de valor mais eficaz do que com ingredientes naturais ou bio, mas uma consumidora mais jovem vai preferir que o produto tenha ingredientes naturais. Mas claro que isto acontece mais no mercado cosmético, pois no mercado alimentar se o preço for o mesmo as pessoas preferem os produtos "sem corantes, sem conservantes…".

9. Diria que a COVID-19 mudou o tipo de cosméticos que a maioria consume e a regularidade com que o fazem, ou não concorda na sua totalidade com esta afirmação?

Com a pandemia perdeu-se aqui um pouco do "*work life balance*" e com o alerta para a saúde mental fez com que as mulheres tivessem muito mais necessidade de ter um "*me time*", ou seja terem tempo para cuidar delas e de criarem uma rotina não só diária, mas também para o banho. O *body care* passou a ser o novo *skin care*. O facto também de termos estado tanto tempo em reuniões via zoom, fez-nos olhar muito para nós próprios e preocupar-nos mais connosco e com a nossa imagem, o que fez com que houvesse maior frequência de consumo.

10. Por último, onde vê a indústria cosmética daqui a 10 anos? Quais na sua opinião serão as maiores tendências, o que o consumidor vai procurar e o que o mercado vai oferecer?

Cada vez há mais a ideia de cosméticos ligados à neurociência, ou seja, com benefícios no bem-estar, que mexam diretamente com as hormonas, e também dos cosméticos com o microbioma da pele. Portanto, vai haver cada vez mais a ideia de que os cosméticos não devem mudar, mas sim respeitar quem tu és, e devem melhorar-te. Penso que os cosméticos vão deixar de ser tópicos para passarem a ser cada vez mais ingeríveis. Muito associado a novas categorias e aromas específicos para as necessidades de cada pessoa.

Tânia Fraga – Brand Manager René Furterer – Pierre Fabre

1. Como definiria o setor cosmético nos dias de hoje (de um modo geral, o que os consumidores procuram, os desafios do mercado, etc.)?

O setor cosmético, tal como tantos outros, teve neste cenário pós-pandémico algumas alterações significativas e outras que voltaram aquilo que já era anteriormente, mas, na minha opinião, as pessoas passaram a ser mais seletivas. A dúvida, o rendimento, a incerteza estiveram na ordem do dia das escolhas do consumidor e, por isso, são hoje em dia mais seletivos e ao serem mais seletivos, naturalmente, focam-se mais naquilo que é o problema. Imaginando, na categoria capilar, as pessoas foram-sem mais em tudo o que eram produtos contra a queda de cabelo, caspa… Produtos mais de patologia e menos de beleza.

De qualquer forma, também observamos um novo comportamento multicanal, consumidores que após a pandemia começaram a comprar produtos em novos canais de distribuição.

2. Há um claro interesse da indústria cosmética pelo público feminino ou sente que isso está a mudar? Sente o segmento para os homens está a crescer?

O publico masculino procura, mas continua a ser um nicho. Contudo as marcas estão a apostar cada vez mais, pois é um *target* que é fiel, ou seja, é um tipo de consumidor que quando compra automaticamente fideliza e dificilmente troca. Desta forma, começam a aparecer cada vez mais marcas capilares para o homem, em todos os canais: farmácias, supermercados, perfumarias. Não obstante, continua a ser um nicho de mercado.

3. Na sua opinião, que tipo de produtos cosméticos os consumidores mais procuram (tendo em conta as 7 categorias cosméticas: body care, hair care, makeup, perfume, oral care, skin care, sun care)?

Neste caso, só consigo responder com base no canal farmácia e não em relação aos restantes, uma vez que não tenho os dados do grande consumo, mas é sem dúvida o rosto e claro, dentro do rosto, a categoria de anti-idade. Ou seja, se falarmos em valor é o rosto, mas se estamos a falar em unidades o corpo é o mercado com maior expressão.

4. Se pudesse referir 3 grandes fatores que levaram a uma mudança no setor cosmético, quais seriam? E porquê?

Eu acho que a pandemia veio ajudar a reforçar tendências que já iriam existir, apenas foram antecipadas, mas talvez o grande fator seja o multicanal, esta acessibilidade à informação, internet, digital, veio mostrar por exemplo tendência asiáticas a serem incorporadas na europa. Portanto, o digital diria que é a grande razão para esta mudança no que toca à procura.

5. Sente que hoje em dia há uma evidência clara dos consumidores pelo consumo de cosméticos online, ou ainda existe um largo regime híbrido?

Eu acho que continua a ter o peso e carga do físico na compra. Contudo, durante o processo de procura e de disponibilização da informação acontece muito a nível digital, mas a compra ainda se passa muito no físico, principalmente quando é a primeira vez, mas, por exemplo, quando é uma recompra as pessoas procuram o melhor preço, promoção e por isso descuram o físico pois já conhecem o produto e compram *online*.

Mas quando é a primeira vez, e está ligado a questões patológicas, o físico, o aconselhamento continua a ser procurado pela grande maioria dos consumidores.

6. Considera que nos dias de hoje há uma procura por parte dos consumidores por produtos sustentáveis, amigos do ambiente (feitos de materiais reciclados, circuito de produção curta, redução do desperdício de água na sua produção)?

Eu considero que a ideia de sustentabilidade já não é só "*trendy*" vai continuar a existir e veio para ficar, mas acho que continua a ser um nicho, ou seja quem faz todo o processo de uma compra desde o início ao fim sem se desviar da importância da sustentabilidade é ainda um número reduzido. Claro que isto acontece, porque a ideia de sustentabilidade tem um custo associado e ou as pessoas estão disponíveis para gastar esse valor adicional ou não estão, e a verdade é que a maioria ainda não está.

7. Considera que nos dias hoje há uma procura por parte dos consumidores por cosméticos que não sejam testados em animais (tendo em conta um panorama mais global e não nacional)?

O produto, para ser comercializado e vendido ao consumidor na China, tem de ser testado em animais. Contudo é o produto final e não o ingrediente ativo. Ou seja, esse produto que foi testado em animais na China nunca será comercializado na europa, pela lei que temos estabelecida. Desta forma, acho que não há uma grande preocupação do consumidor por esta temática… é um nicho que se preocupa com este tipo de assunto.

8. Considera que nos dias hoje há uma procura por parte dos consumidores por cosméticos que tenham ingredientes ativos naturais e com fórmulas bio?

Acho que, ao nível dos ingredientes ativos, há uma maior procura também ligada à eficácia. Até no próprio setor alimentar se sente muito mais esse lado do biológico e natural. Ao passar para o setor cosmético tornou-se um conceito mais apelativo. O biológico e o natural são mais palpáveis no dia-a-dia.

9. Diria que a covid-19 mudou o tipo de cosméticos que a maioria consome e a regularidade com que o fazem, ou não concorda na sua totalidade com esta afirmação?

Se compararmos a frequência com o período pandémico, sim, aumentou, mas se compararmos com o período antes da pandemia, não acho que tenha havido um crescimento, o que houve foi uma alteração do tipo de categoria, os fenómenos relacionados com maquilhagem, vernizes, etc. O facto de se estar em casa foi reduzindo a sua utilização diária, mas também assistimos a um *boom* de consumo das marcas *low-cost*/ acessíveis a nível de maquilhagem.

10. Por último, onde vê a indústria cosmética daqui a 10 anos? Quais na sua opinião serão as maiores tendências, o que o consumidor vai procurar e o que o mercado vai oferecer?

Cada vez mais aquilo que é feito na Ásia vai ser introduzindo na Europa, em termos de hábitos de consumo de tipologia de cosmético, eles utilizam 7 cosméticos para uma rotina de rosto. Mas, mesmo a nível capilar, há tendência de produtos que são disruptivos, como é o exemplo: bálsamos e máscaras líquidos…

Outro hábito também que já está incorporado, mas que também vai continuar a crescer, serão os suplementos orais para resolver vários tipos de problemas, mas que hoje conhecemos como comprimidos, mas amanhã poderão vir a ser pastilhas, chás diluídos, gomas…este tipo de produtos vão acabar por atingir outras categorias também.

Cátia Santos – Brand Manager Avène – Pierre Fabre

1. Como definiria o setor cosmético nos dias de hoje (de um modo geral, o que os consumidores procuram, os desafios do mercado, etc.)?

Eu diria que, mesmo antes da pandemia, as pessoas já procuravam beleza pela saúde, ou seja, beleza como cuidado e como ser saudável. Com a chegada do COVID, essa necessidade ainda sublinhou mais o bem-estar aliado à saúde. Desta forma, os consumidores procuram cosméticos que tenham na sua fórmula bons ingredientes, que não sejam controversos. O consumidor está mais informado, não só pela informação que é vinculada, ou mesmos pelas aplicações que existem, como é o exemplo de uma *app* que permite fazer a leitura da fórmula INCI. Não é uma aplicação utilizada em Portugal, mas sim essencialmente em França que, através de uma fotografia à INCI, consegue detetar se os ingredientes que contém o produto são ou não controversos (aplicação YUKA). Desta forma, as pessoas têm em conta tudo o que está a acontecer no mundo. Procuram cosmética com uma boa formulação e amiga do ambiente, tudo isto assente em INOVAÇÃO.

2. Há um claro interesse da indústria cosmética pelo público feminino ou sente que isso está a mudar? Sente o segmento para os homens está a crescer?

Eu não sei se é o segmento que está a crescer ou se são os segmentos que já existem que estão a amplificar a resposta para esse público também, ou seja, a forma da comunicação é amplificada para um homem e para mulher.

As pessoas estão cada vez mais a adaptar um produto cosmético não só para a mulher, mas como para o homem. Por exemplo, se for um produto sem perfume sabemos que mais facilmente será unissexo. Mas, como cada vez mais o mercado está a ser feito de séruns e produtos mais concentrados, acabamos por alargar mais para esse público.

Existem marcas em Portugal a apostar cada vez mais neste *target*, como é o exemplo da Lierac, que lançou dentro do canal farmácia um cuidado 3 em 1 para homem, que fez a marca crescer, mas em dados de *sell-out*, não se vê esse *boom* nem inovação no que toca a este mercado. Desta forma, podemos dizer que assistimos realmente a uma amplificação de *target* dentro de produtos que tradicionalmente eram única e exclusivamente para mulheres, mas que agora são comunicados tanto para homens como para mulheres.

3. Na sua opinião, que tipo de produtos cosméticos os consumidores mais procuram (tendo em conta as 7 categorias cosméticas: body care, hair care, makeup, perfume, oral care, skin care, sun care)?

Se olharmos em valor, a resposta será anti-idade, dentro da categoria de rosto, mas se olharmos em termos de unidades o acne e a anti-idade estão taco a taco.

4. Se pudesse referir 3 grandes fatores que levaram a uma mudança no setor cosmético, quais seriam? E porquê?

A COVID será um deles, mudou o nosso setor dermocosmético local e mundial, sobretudo nas compras *online*. Antigamente, havia uma percentagem pequena de consumo *online* que, com o *lockdown*, fez com que gerasse uma procura pela compra *online*.

Em segundo, a procura de cuidados mais seguros, naturais e amigos do ambiente, um pouco aquilo que mencionei na primeira questão. Acho que estes dois são os principais, sim.

5. Sente que hoje em dia há uma evidência clara dos consumidores pelo consumo de cosméticos online, ou ainda existe um largo regime híbrido?

Houve um crescimento exponencial, mas, mesmo assim, não atingiu aquilo que seriam os valores esperados *online*. Ainda assim, continua a ser superior às vendas físicas, não estivéssemos nós a falar de cosméticos. É preciso haver a parte da experimentação. Ou seja, o comprador *online* é na ótica da recompra e não de querer conhecer a marca.

6. Considera que nos dias de hoje há uma procura por parte dos consumidores por produtos sustentáveis, amigos do ambiente (feitos de materiais reciclados, circuito de produção curta, redução do desperdício de água na sua produção)?

De um ponto de vista pessoal, pois não tenho dados que suportem essa questão, nós dizemos que queremos e que gostamos de produtos amigos do ambiente, mas se esse mesmo produto custar o dobro, vamos comprar acabar por comprar um que tem um custo menor e que possivelmente respeite um pouco menos o ambiente. Hoje em dia em farmácia não existem produtos maus. Portanto, quando chega a hora H, e estando neste momento o país numa situação de regressão económica, acaba por se comprar aquele custa menos e não o que é mais amigos do ambiente.

7. Considera que nos dias hoje há uma procura por parte dos consumidores por cosméticos que não sejam testados em animais (isto tendo em conta um panorama mais global e não nacional)?

Sinto que não há muitas questões no que diz respeito a esse assunto, isto porque as pessoas estão conscientes da lei que temos na Europa que proíbe a testagem de qualquer cosmético em animais. Contudo, quando surgem questões sobre a *cruelty-free*, é maioritariamente sobre o produto final e não de algum ingrediente específico. Por vezes, acontece perguntarem se a Pierre

Fabre na China testa em animais e claro que aí não conseguimos dar certezas que não o façam, pois a lei é o oposto e obriga a essa testagem em animais.

8. Considera que nos dias hoje há uma procura por parte dos consumidores por cosméticos que tenham ingredientes ativos naturais e com fórmulas bio?

O que eu sinto é que muitas vezes as pessoas não sabem a diferença entre o natural e o bio… o bio tem de ter o certificado Ecocert, tem de passar por um processo de formulação gigante, enquanto o natural só precisa de uma percentagem de ingredientes naturais.

Mas, tendo em conta um estudo feito com várias farmácias onde pedimos para nos dizerem quantas pessoas já chegavam ao balcão a procurar produtos bio e naturais conseguimos obter uma percentagem entre os 20% e os 40%, ou seja, já é um número elevado. Contudo, pode acontecer o mesmo que é pedir, ver, mas depois na hora de comprar, optam pelo mais barato.

9. Diria que a COVID-19 mudou o tipo de cosméticos que a maioria consome e a regularidade com que o fazem, ou não concorda na sua totalidade com esta afirmação?

Sinto que, em 2019, havia uma regularidade de compra muito mais elevada, acho que estamos a voltar aos níveis pré COVID. Como exemplo, a maquilhagem que está a voltar a ter um aumento gigante. Na época da COVID os consumidores procuravam produtos mais ligados a patologias: queda de cabelo, caspa, acne, o que fosse potenciado por stress. Atualmente, e segundo alguns dados KANTAR em Beleza, nas categorias de cuidado, os consumidores estão a comprar cada vez mais tónicos, esfoliantes, fios dentários e hidratantes, enquanto que a maquilhagem, perfumaria e gel/leite limpeza estão ainda em decréscimo.

10. Por último, onde vê a indústria cosmética daqui a 10 anos? Quais na sua opinião serão as maiores tendências, o que o consumidor vai procurar e o que o mercado vai oferecer?

Tudo o que tem haver com a inteligência artificial. Cada vez mais vamos ver associado à cosmética e à pele, vai haver mais aplicações ligadas à realidade aumentada. Tudo o que temos hoje, daqui a 10 anos vai estar mais informatizado e mais tecnológico do que temos agora. E o facto de termos produtos que vão ser mais rápidos na obtenção de resultados.

SCRIPT SURVEY

https://docs.google.com/forms/d/1V8RAMU08oUilCdE_Y9tnG1J6nFargOncrbxJqRUYexQ/prefill

QUESTÕES GERAIS // GENERAL QUESTIONS

Peço que selecione em cada pergunta a alínea que melhor se adequa a si. // I ask you to select in each question the answer that best suits you.

Idade // Age *

- ○ 20-27 anos // 20-27 years old
- ○ 28-35 anos // 28-35 years old
- ○ 36-42 anos // 36-42 years old
- ○ 43-50 anos // 43-50 years old
- ○ > de 50 anos // > de 50 years old

Género // Gender *

- ○ Masculino // Male
- ○ Feminino // Female
- ○ Prefiro não dizer // Prefer not to say

Grau de Escolaridade // Educational level *

- ○ Secundário // High school
- ○ Licenciatura // Bachelor
- ○ Mestrado // Master
- ○ Douturamento // PhD

Comportamento do Consumidor // Consumer Behaviour

Responda às seguintes questões, selecionando a resposta que o identifica melhor. // Answer the following questions by selecting the answer that best identifies you.

Considero-me um consumidor mais: // I Consider myself a consumer more: *

- ○ Impulsivo // Impulsive
- ○ Consciente // Conscious

Os produtos cosméticos fazem parte da sua rotina diária? // Are cosmetics part of your daily routine? *

- ○ Sim // Yes
- ○ Não // No

Com que frequência compra produtos cosméticos? // How often do you buy cosmetics? *

- ○ 1 -3 vezes por semana // 1 to 3 times a week
- ○ 2-4 vezes por mês // 2 to 4 times a month
- ○ 1 vez por mês // Once for month
- ○ 2 em 2 meses // From 2 to 2 months
- ○ Raramente // Rarely

Qual das 3 categorias cosméticas em baixo referidas, é a que consome em maior * volume? // Which of the three cosmetic categories listed below is the one you consume more?

- Cosmética Facial // Skin Care
- Cosmética Capilar // Hair Care
- Cosmética decorativa (maquilhagem) // Make-up

Características Cosméticas // Cosmetic Features

Numa escala de 1 a 10, sendo que 1 "não é importante" e 10 "muito importante" responda às questões seguintes // On a scale of 1 to 10, with 1 being "not important" and 10 being "very important" answer the following questions.

Quão importante é para si produtos cosméticos sustentáveis? // How important are sustainable cosmetic products to you? *

1 2 3 4 5 6 7 8 9 10

Não é importante // Not Important ○○○○○○○○○○ Muito Importante // Very Important

Quão importante é para si produtos cosméticos que não sejam testados em animais? // How important is cosmetic products to you that are not tested on animals? *

1 2 3 4 5 6 7 8 9 10

Não é importante // Not Important ○○○○○○○○○○ Muito Importante // Very Important

Quão importante é para si produtos cosméticos com ingredientes ativos naturais e fórmulas bio? // How important is cosmetic products with natural active ingredients and organic formulas to you? *

1 2 3 4 5 6 7 8 9 10

Não é importante // Not Important ○○○○○○○○○○ Muito Importante // Very Important

Quão importante é para si produtos cosméticos com valores mais acessíveis? // How important is affordable cosmetic products to you? *

1 2 3 4 5 6 7 8 9 10

Não é importante // Not Important ○○○○○○○○○○ Muito Importante // Very Important

Quão importante é pars si produtos cosméticos inovadores? // How important is for you innovative cosmetic products? *

1 2 3 4 5 6 7 8 9 10

Não é importante // Not Important ○○○○○○○○○○ Muito Importante // Very Important

COVID-19 // COVID-19 PANDEMIC

Responda às seguintes questões, selecionando a resposta que o identifica melhor. // Answer the following questions by selecting the answer that best identifies you.

Tendo em conta o panorama que vivemos nos últimos 2 anos, a COVID-19 teve impacto no seu consumo de produtos cosméticos? // In view of the situation we have experienced over the last two years, has COVID-19 had an impact on your consumption of cosmetic products? *

- Sim // Yes
- Não // No

Reduziu o seu consumo de produtos cosméticos, devido à pandemia? // Have you reduced your use of cosmetics due to the pandemic? *

- Sim // Yes
- Não // No

Houve uma alteração nos tipo de produtos cosméticos que costumava comprar antes da pandemia e atualmente? // Was there any change in the type of cosmetic products you used to buy before the pandemic and now? *

- Sim // Yes
- Não // No

Se respondeu que sim à questão anterior, que tipo de cosméticos deixou de comprar e quais compra atualmente? // If you answered yes to the previous question, what kind of cosmetics did you stop buying and which ones do you currently buy?

A sua resposta

IMPACTO DA COVID-19 // COVID-19 IMPACT

A pandemia trouxe algumas alterações na forma como consumimos. Responda às questões seguintes numa escala de 1 a 5, sendo que 1 "não concordo" e 5 "concordo absolutamente" // The pandemic brought some changes in the way we consume. Answer the following questions on a scale from 1 to 5, with 1 "I completely disagree" and 5 "I absolutely agree".

Compro os meus produtos cosméticos apenas online // I only buy my cosmetic products online *

	1	2	3	4	5	
Discordo totalmente // I completely disagree	◯	◯	◯	◯	◯	Concordo Absolutamente // I absolutely agree

Compro os meus produtos cosméticos apenas em lojas fisícas // I only buy my cosmetics in physical stores *

	1	2	3	4	5	
Discordo totalmente // I completely disagree	◯	◯	◯	◯	◯	Concordo Absolutamente // I absolutely agree

Compro apenas produtos cosméticos que sejam amigos do ambiente // I only buy eco-friendly cosmetics *

	1	2	3	4	5	
Discordo totalmente // I completely disagree	◯	◯	◯	◯	◯	Concordo Absolutamente // I absolutely agree

Compro apenas produtos cosméticos que não sejam testados em animais // I only buy cosmetics that are not tested on animals *

	1	2	3	4	5	
Discordo totalmente // I completely disagree	○	○	○	○	○	Concordo Absolutamente // I absolutely agree

Compro apenas produtos cosméticos naturais e bio // I only buy natural and organic cosmetic products *

	1	2	3	4	5	
Discordo totalmente // I completely disagree	○	○	○	○	○	Concordo Absolutamente // I absolutely agree

Compro apenas produtos cosméticos inovadores e diferentes // I only buy innovative and different cosmetic products *

	1	2	3	4	5	
Discordo totalmente // I completely disagree	○	○	○	○	○	Concordo Absolutamente // I absolutely agree

Compro apenas produtos cosméticos acessiveis // I only buy accessible cosmetic products *

	1	2	3	4	5	
Discordo totalmente // I completely disagree	○	○	○	○	○	Concordo Absolutamente // I absolutely agree

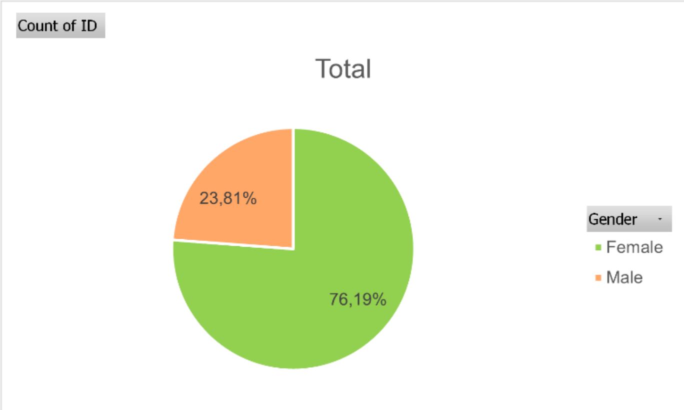
Qual deste fatores seria decisivo na compra de um produto cosmético? // Which of these factors would be decisive in the purchase of a cosmetic product? *

- ○ Ser um produto sustentável (embalagens recicladas, produção contra o desperdicio de água, circuito de produção mais curto...) // Be a sustainable product (recycled packaging, production against water waste, shorter production circuit...)
- ○ Ser um produto cruelty-free (não testa em qualquer tipo de animais) // Be Cruelty-free product (do not test on any kind of animals)
- ○ Ser um produto inovador (diferente do que habitualmente encontramos no mercado) // Be an innovative product (different from that we usually find in the market)
- ○ Ser um produto acessível (com um preço mais barato relativo à concorrência) // Be an affordable product (with a cheaper price relative to competition)

OBRIGADA PELA SUA PARTICIPAÇÃO! // THANK YOU FOR YOUR PARTICIPATION!

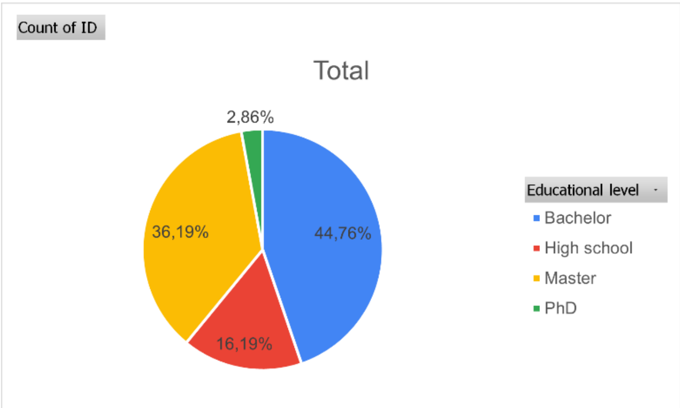
Tables Results

Gender



A – Gender of the respondents.

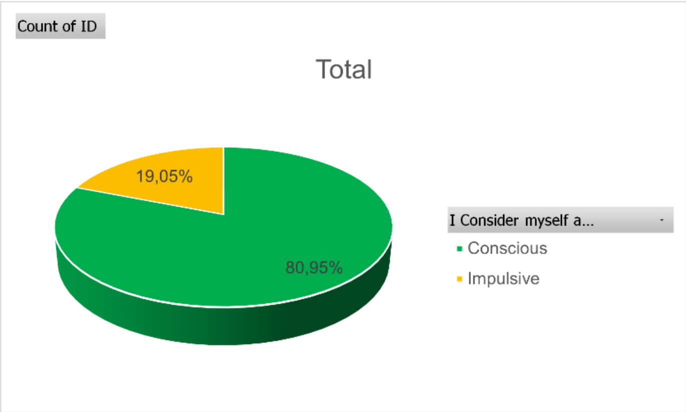
Education Level



B – Education level of the respondents.

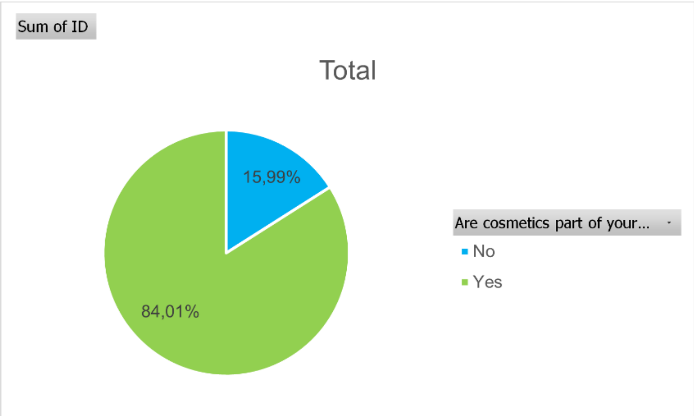
Consumer Behaviour

"I consider myself a more:"



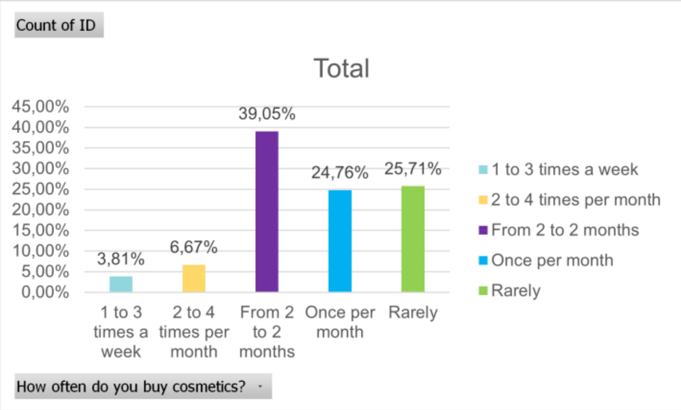
C – Respondents are more impulsive x conscious.

"Are Cosmetics part of your Daily Routine"



D – Respondents use cosmetics on their daily routine.

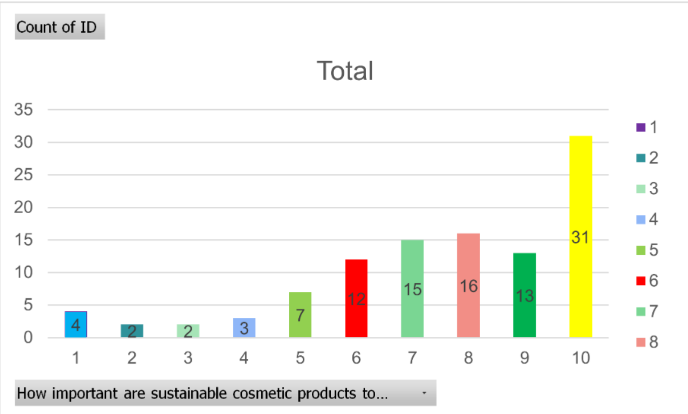
"How often do you buy cosmetics"



E – How often respondents buy cosmetics.

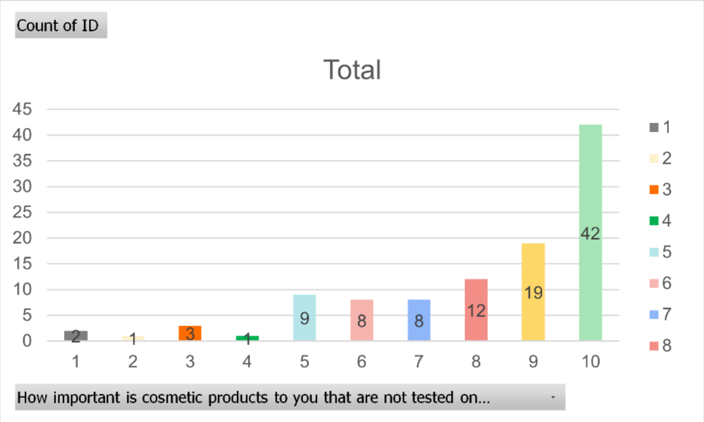
Cosmetic Features

"How important are sustainable cosmetic products to you?"



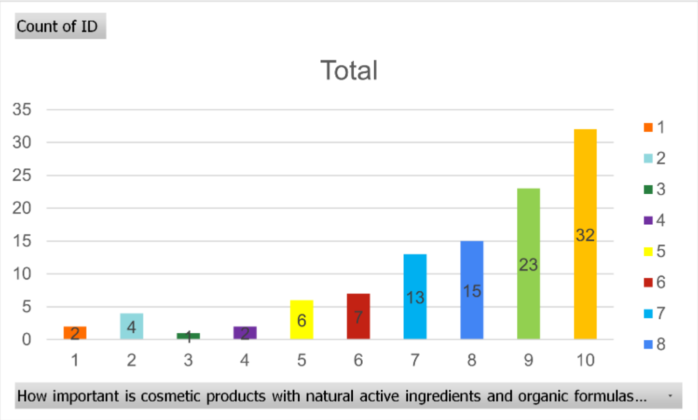
F – Importance of sustainable cosmetics on a scale 1 to 10 being 1 "not important" and 10 "very important".

"How important is cosmetic products to you that are not tested on animals?"



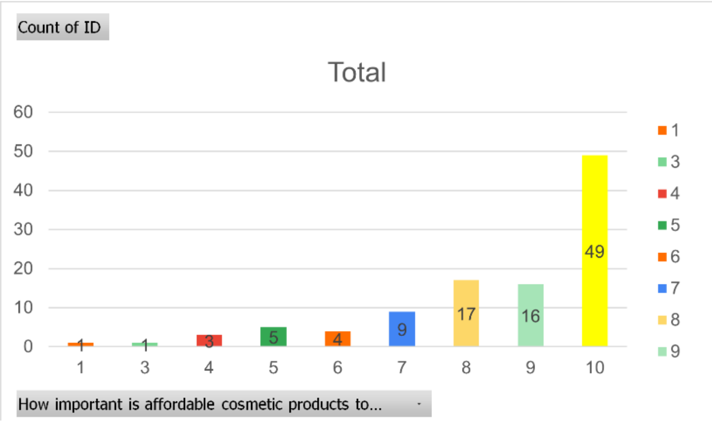
G – Importance of cosmetics not tested on animals on a scale 1 to 10 being 1 "not important" and 10 "very important".

"How important is cosmetic products with natural active ingredients and organic formulas to you?"



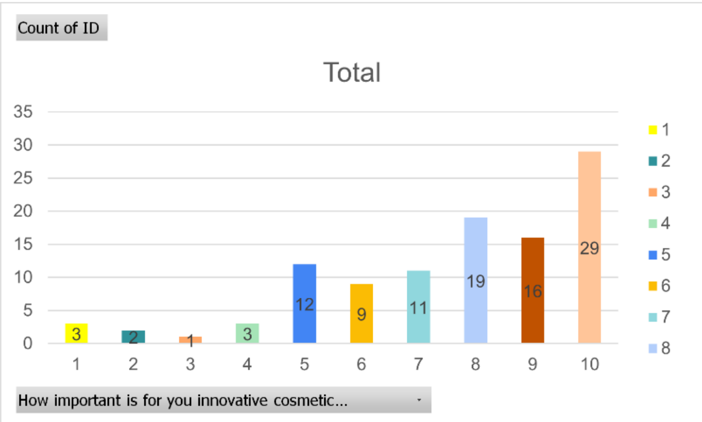
H – Importance of cosmetics with natural active ingredients and organic formulas on a scale 1 to 10, being 1 "not important" and 10 "very important".

How important is affordable cosmetic products to you?



I – Importance of affordable cosmetics on a scale 1 to 10 being 1 "not important" and 10 "very important".

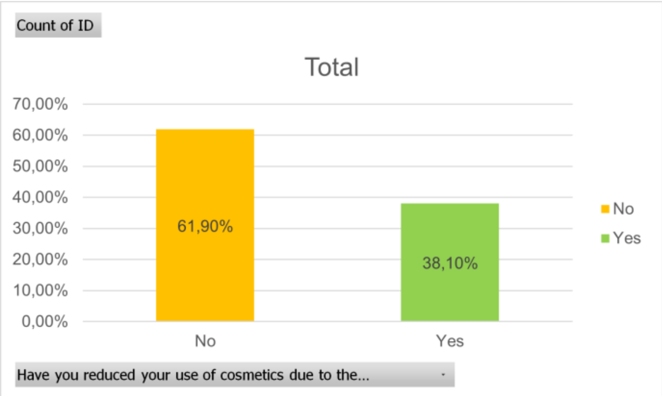
How important is for you innovative cosmetic products?



J – Importance of innovative cosmetics on a scale 1 to 10, being 1 "not important" and 10 "very important".

COVID-19 PANDEMIC

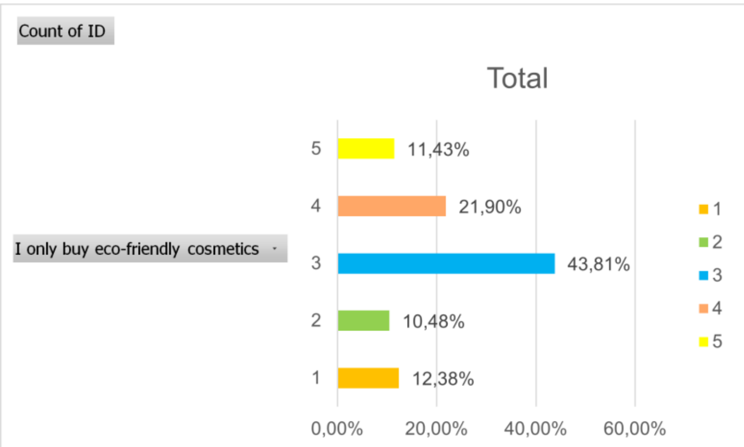
"Have you reduced your use of cosmetics due to the pandemic?"



K – If the used of cosmetics was reduced or not due to the pandemic.

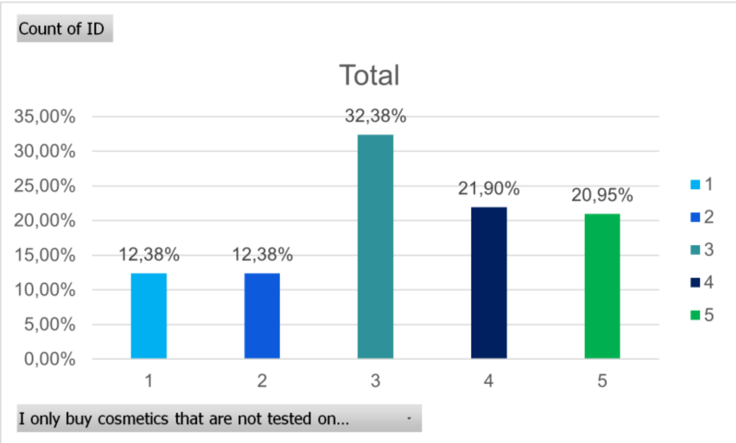
COVID-19 IMPACT

"I only buy eco-friendly cosmetics"



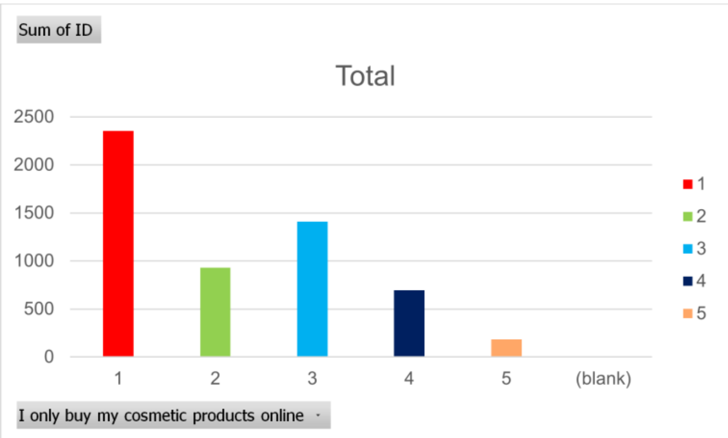
L – Only buying cosmetics that are eco-friendly on a scale, from 1 being "completely disagree" and 5 "completely agree".

"I only buy cosmetics that are not tested in animals"



M – Only buying cosmetics that are not tested on animals on a scale, from 1 being "completely disagree" and 5 "completely agree".

"I only buy my cosmetics online"



N – Only buying my cosmetics online on a scale, from 1 being "completely disagree" and 5 "completely agree".