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Finding the best strategy for Vichy to attract younger consumers in Portugal

An analysis of consumers and categories in dermo-cosmetics

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Abstract

To reconquer market leadership, Vichy considers it crucial to develop their relationship with the younger generation (< 35 years old). Therefore, this project aims to find the best strategy for the brand to attract them. From a multi-perspective approach, it was possible to analyze the current marketing strategy of the brand and younger consumers' behaviors when shopping for cosmetics. The insights collected showed low brand awareness towards the brand, and that pharmacists do not recommend Vichy when consumers ask for advice. Hence, recommendations to improve the relationship with pharmacies and increase awareness from young consumers were given.

Keywords: Vichy; Brand Management; Market Segmentation; Communication Strategy

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1. Introduction

In contemporary society, it has become the widely accepted norm to use beauty and cosmetic products to gratify one's self image and enhance their personal appearance. The cosmetic market plays a huge role in overall global consumption and in recent years has witnessed several significant transformations. These transformations have arisen from the diversity of consumer's aspirations, preferences, and lifestyles, in addition to the constant innovations from cosmetic organizations. In Portugal, the penetration of cosmetic products has been increasing through the years, where since 2011, dermo-cosmetic products – cosmetics distributed in the pharmacy channel, were the ones that contributed the most to this evolution. Until 2017, Vichy was the leader of this category in the Portuguese market, but it has seen a decrease in its market share ever since.

According to the information provided by the L'Oréal Corporation Presentation (2019) - including a quantitative study to a sample of 352 pharmacies - out of ten sales of dermo-cosmetic products, five are driven by the advice from the dermo-adviser/ pharmacy team, meaning that the success of these players is extremely influenced by the pharmacy personnel. Furthermore, in this market, the first client is the pharmacy, not the final consumer. For this reason, dermo-cosmetic brands should develop a strong relationship with the pharmacy, to incentivize the team to make an effort in the selling process of Vichy products.

During the conversation with the Brand Manager of Vichy, it was pointed out that although the main objective of Vichy is to be a brand for everyone – youth, adults, women and men – Vichy has been facing problems in attracting consumers younger than 35 years old, as people tend to associate it to a brand for elderly women, mainly related to Vichy's position in anti-age products. Therefore, the main objectives of this study are 1) to understand in which of the seven categories of the cosmetic market Vichy should focus on, in the interest of attracting and retaining younger consumers; 2) find the right target for this category; 3) give strategic recommendations to implement this strategy. For this purpose, a multi-perspective research was conducted with firstly, in-depth semi-structured interview with Vichy's brand manager; secondly, in-depth interviews with current and potential consumers of the brand; thirdly, in-depth interviews with pharmacy personnel and lastly, a quantitative survey. All data collected was combined with the information provided by the Vichy management team.

2. Contextual Background

To achieve the main goals of this work project, it is vitally important to first understand the context in which Vichy operates. With this in mind, an in-depth analysis of the Portuguese cosmetic market was undertaken to identify the main trends and distribution channels. Subsequently, the dermo-cosmetic market was also studied, with an analysis of the Vichy brand within this to understand their presence as a brand in the Portuguese market.

2.1. The Cosmetic Market in Portugal

Women, and increasingly men, are constantly changing the way they define beauty and its role in their lives (Forbes 2019), subjecting the cosmetic market to continuously launching products innovations. The cosmetic products are grouped according to seven categories, defined as skincare (face and body), suncare, haircare, deodorants, make-up & color cosmetics, and fragrances. This is a very competitive industry due to the great convenience offered by the mass-market products (distributed in hypermarkets and supermarkets), and the reliability of the premium products (distributed in pharmacies, perfumeries, and professionals).

The revenue of the cosmetics segment in Portugal amounts to €142.9 million in 2019, and it is expected to grow annually by 2.0% (2019-2023) (Statista 2019). Studies show that Portuguese consumers are becoming more sophisticated, giving more importance to their appearance and image, and becoming more willing to spend extra sums on products that match their specific needs (Euromonitor 2019a). The penetration of cosmetic products has been increasing through the years, making Portugal at par with Europe in most categories – hair care and deodorants are the ones with bigger penetration (97% and 92% respectively), and skincare had the most significant recent evolution (Appendix 1).

2.1.1 Trends of the Cosmetic Market Worldwide and in Portugal

Following secondary research, consumers are increasingly demanding for naturally sourced and eco-friendly cosmetics while giving extreme importance to online information sharing.

In Table 1 below it is presented the three main trends of the cosmetic market worldwide, and then how they are shaping the Portuguese market.

Table 1: Cosmetic Market Main Trends Worldwide and in Portugal

Natural and Organic Products
Currently, trends for cosmetics are turning towards natural solutions, which is related to a healthy lifestyle, as well as linking the consumption of cosmetics to healthy eating habits (Amberg and Fogarassy 2019). Furthermore, people are demanding transparency. Before choosing the product, consumers search for the ingredients' composition and want to know how it is made and whether it is ethical or not (Mccord 2018). According to Euromonitor, Portuguese consumers are giving more importance to the ingredients used in product formulations and getting more conscious of their benefits and harmful effects. Therefore, Portuguese beauty and personal care players have been developing a gentler formula, free from parabens or using natural ingredients (plant extracts and vegetal oils) (Euromonitor 2019a).
Sustainable Products
Environmental concerns are responsible for a rise in sales in the ethical cosmetics of 10.8% since consumers are opting for non-synthetic products to avoid environmentally damaging chemicals (Markets Report 2018). According to Aurelia Ziomek, Health and Body Care Buyer at the Planet Organic "More than any other generation before them, Millennials are concerned with their impact on the environment. This more conscious way of living goes hand in hand with making informed decisions about products millennials buy." In 2017, Portuguese environmental attitudes and concerns increased by 8.5% compared to 2016. However, few are willing to pay more for sustainable products or environmental taxes (Sic Notícias 2018).
Digital Transformation
In January 2019, 79% of internet active users worldwide, were also social network users, an increase of 288 million (9%) versus January 2018 (Kemp 2019). This digital movement has been affecting both, how cosmetic brands interact with potential consumers and how consumers behave towards a new brand/ product. When advertising through these platforms, brands deliver greater customer engagement and experience, increasing brand loyalty. Besides, to create more impactful campaigns, brands have been doing partnerships with influencers, since they create and channel trends, giving consumers far greater access to new products. Empowered by access to more information, consumers have come to expect more, asking for personalized products, interactive experiences and experts' advice. Further, they are increasingly giving importance to online opinion sharing, and reviews ("The Deloitte Consumer Review" 2014). According to McKinsey & Company, digital is becoming an important trend in the health-care area. Customers are becoming more engaged, "they feel empowered by the vast amount of health information available online and on apps", being much less dependent on their doctors for recommendations. Therefore, pharmacies have the conditions to assume a more significant role in customers' decision making (Champagne and Hung 2015). As reported by Euromonitor, Portuguese "millennials and generation z are social media's children". Nowadays, influencers are dictating and creating Portuguese trends. Consumers follow their advice and routines on beauty and personal care, particularly affecting the performance of the skincare category (Euromonitor 2019a).

2.1.2 Main Distribution Channels of Cosmetics in Portugal

Cosmetics are sold across a variety of channels. In the Portuguese market, the most representative ones are the mass-market, followed by pharmacies and para-pharmacies, and perfumeries (Appendix 2). However, from 2011 to 2018, national cosmetic sales have been facing a decrease in mass-market channels (-3,7%), while pharmacies and para-pharmacies and perfumeries have been gaining space (+3,6% and +1,1% respectively). According to L'Oréal Corporation Presentation (2019), the channels' value weight differs per category. In 2018, mass-market was the main channel for the consumption of hair care and deodorants, while pharmacies/ para-pharmacies were the destination channel for the skincare (face and body) and the suncare categories, and perfumeries for the consumption of fragrances and make-up products (Appendix 3). Furthermore, it was obtained the main drivers affecting the purchase decision of skincare in each channel: mass-market - lower prices and promotions; pharma channels - professional advice and higher quality products; perfumeries - professional advice and available products that consumers like (Appendix 4).

2.1.3 The Skin Care Market in Portugal

According to Oxford Dictionary, skin care is defined by "the use of cosmetics to care for the skin". The skincare category comprises face care, to moisture, cleanse and protect facial skin, and body care. The skin care market accelerated sharply in 2018. According to Euromonitor (2019b), "Portuguese consumers used to see skin care products as not essential and quite expensive compared to their benefits." Nowadays, new routines are boosting skin care products' sales. In 2018, skin care reached a value of €353 million in the Portuguese market (Euromonitor 2019b), where 69,6% of the category was distributed through mass-market channels, whereas the premium segment accounted for 30,4% of the market's value (Appendix 5). Portuguese consumers, particularly women, are becoming increasingly aware of the importance of taking good care of their skin, making this category the most significant inside the cosmetic market (Appendix 6). According to a market-research made by Euromonitor

(2019), the skin care market is witnessing further polarization. On the one hand, consumers are opting for more sophisticated, higher quality products, gradually overtaking remedial skincare/ pharma brands. This rising interest in dermo-cosmetics is also related to the recovery of the Portuguese economy in 2014/2015 since a higher range of consumers can now afford them. On the other hand, skin care is facing a democratization trend. Private label and mass-market players have launched new product ranges or rebranded already existing ones, with more transparency in its product labels and natural/organic ingredients' composition, improving the perception of consumers towards their products' image. Consequently, the category is expected to grow amongst more modest consumers, since these players offer much more affordable prices (Euromonitor 2019a).

External factors, such as pollution, stress and sun exposure, have raised the commonness of sensitive and dry facial skin, further pushing additional treatments to the fore. Several products such as detox masks are growing at a very fast pace, becoming a weekly routine, especially for the younger generation. Furthermore, as make-up is another growing segment in the Portuguese market, women are using more products to maintain their face clean at the end of the day (Euromonitor 2019b). Anti-aging and anti-cellulite creams are also taking a lead role inside this segment, mainly demanded among an aging population.

2.2 The Dermo-cosmetic Market in Portugal

The dermo-cosmetic market is where the beauty and the health industries meet. Dermo-cosmetics are the cosmetics that are distributed in traditional healthcare channels, like pharmacies and para-pharmacies. To be part of this market, a product must address specific skin concerns, such as acne & oily skin, eczema, dry skin, and sensitive skin. Therefore, it has to contain active ingredients in high concentrations "formulated under the guidance of trained skin care professionals", undergoing rigorous clinical testing to ensure effectiveness on sensitive skin (Irani 2019).

As it was mentioned before, over the last several years, dermo-cosmetics has been the segment that mainly contributed to the evolution of the Portuguese cosmetic market. The portfolio of the Portuguese market is presented in Appendix 7, where it is possible to note that the combination of both skincare and suncare categories, contribute to more than 65% of the market composition, with body (24%), anti-age (19%) and sun care (17%) being the products with higher penetration in the market. The growing awareness of how external factors can damage skin is motivating consumers to search for products that support the long-term health of it, increasingly opting for the ones that go beyond traditional skincare and into prevention as well (Euromonitor 2018). Although this "wellness" positioning has been increasing among the young, this target is still a small percentage of the sales in the pharmacy channel. Women with 15-24 years old, only represent 1,1% of the market and the ones with 25-34 years old contribute to 14,9% of the sales. Pharmacy consumers are more developed in the target 35-44 years old, representing 30% of the market composition (Appendix 8).

Over the last four years, Vichy and Avène have been competing fiercely for the first place in the Portuguese dermo-cosmetic market. Both brands have been experiencing a negative evolution as a consequence of other brands' growth, which culminated with Avène taking the leading position in 2018.

2.3 The Brand Vichy in Portugal

By combining secondary research and the insights provided by the Brand Manager of Vichy, it was possible to build an in-depth analysis on the behavior of the brand in the Portuguese market as well as building its identity and positioning. These approaches were crucial to better understand how the company wants the brand to be perceived and will be taken into consideration when further analyzing the perception of the consumers on building future recommendations.

Vichy is a dermo-cosmetic brand founded in 1931, after the discovery of the thermal water from the hot springs of the town Vichy, in France. This water is composed of 15 different minerals that offer therapeutic benefits for the skin. In 1955, Vichy was acquired by the L'Oréal group, and it is now part of its active cosmetics division. Currently, what Vichy focuses on, is significantly different from the main market composition, with anti-age products being the main focus. Looking at Appendix 9, it is possible to note that Vichy has potential to grow in the sun care and daily care categories, since they still represent a small portion on the Vichy's market share composition, while for the market the former already represents 17% and the latter 7%. In 2018 Vichy mainly attracted the target above 55 years old, corresponding to 61,3% of their penetration, while consumers below 35 years old, only represented 20,2% (Appendix 10).

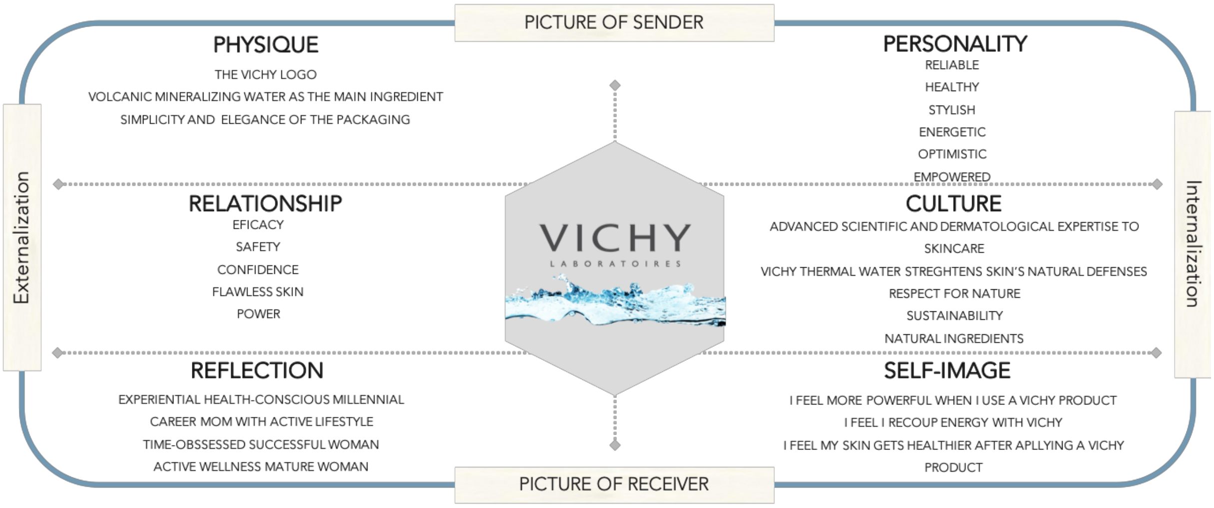
2.3.1 Brand Inventory of Vichy in Portugal

According to Kevin Keller, Brand Inventory can supply "useful analysis, and initial insights into how brand equity may be better managed."(Keller 2013). The brand is composed of a wide range of products, distributed in six different categories (Appendix 11), and Vichy's slogan is "Vichy makes your skin stronger", with the packaging acting as a strong communication element, classically represented by an image of purity, projecting the image of a high-quality product, with a visual logo "V". The products are heavily advertised, focusing on Vichy's main beliefs: 100% efficacy (skin knowledge and expertise), 100% tolerance (composed by thermal spa water) and 100% pleasure (sensorial textures).

2.3.2 Brand Identity of Vichy in Portugal

According to Jean-Noel Kapferer (2012), brand identity is what the brand managers would like the brand to be. It is the aggregation of different elements, that combined help organizations build strong brands with unique characteristics. This approach is crucial for companies to succeed, since "before projecting an image to the public, we must know exactly what we want to project."(Kapferer 2012) Figure 1 bellow exhibits the Brand Identity Prism applied to the brand Vichy, further insights on theory can be found in Appendix 12.

Figure 1: Vichy's Brand Identity



Source: Author, 2019, Information provided by the Brand Manager of Vichy, Model based on Kapferer, 2008

As can be seen, Vichy's presence in the market is centered on providing effective and safe products, for active women, while protecting the environment and promoting sustainability.

2.3.3 Brand Positioning of Vichy in Portugal

For a brand to succeed, it is crucial to capture a competitive positioning in a specific market. The CBBE method developed by Keller (2013), explains that to position a brand, a marketer must identify the target market and the nature of competition, and the points of parity and difference between the brand and its main competitors. In Table 2 below, it is possible to see the current brand positioning of Vichy in Portugal, according to this method.

Table 1: Brand Positioning of Vichy in Portugal

Who the **target** consumers should be? *Positioning a brand is the "act of designing the company's offering and image to occupy a distinct place in the mind of the target market." (Keller 2013)*	**Psychographic Segmentation** Adult women and millennials with active lifestyles, whose main priority is to boost and strengthen their health.
Who the **main competitors** should be? *Positioning requires "identifying and establishing points-of-parity and points-of-difference [with main competitors] to achieve the right brand identity and brand image" (Keller 2013)*	**Dermo-cosmetic brands** *Avène, Bioderma, Filorga and Caudalie*

<table>
<tr><td rowspan="2">Points of Parity (POP)
Points that are not unique for the brand but shared with its main competitors.</td><td>Category POP
Necessary but not enough conditions for brand choice
• Pharmacy distribution
• Tested by dermatologists
• For sensitive skin
• High-quality products</td></tr>
<tr><td>Competitive POP
Designed to “negate” competitors POD
Natural ingredients – Examples:
• We use ingredients of natural origin for the most effective formulas (Vichy)
• We direct the water straight from the source to the production plant (Avène)
• Natural biological mechanisms through our components and our modes of action (Bioderma)</td></tr>
<tr><td rowspan="2">Points of Difference (POD) & Reasons to believe
Unique and positive associations consumers do with a brand and credible reasons for choosing it over the competition.</td><td>Vichy volcanic mineralizing water as the main ingredient
Naturally reach in 15 essential minerals, that strengthen the skin barrier and protect it from external factors, such as UV exposure, pollution, stress, and tobacco.</td></tr>
<tr><td>Sustainable beauty
Responsible sourcing, environmentally friendly formulations, move towards eco-responsible packaging and sustainable production & distribution.</td></tr>
<tr><td colspan="2">Positioning Statement
For adult women and millennials whose main priority is their health (Target), Vichy is a dermo-cosmetic brand (Frame of Reference), distributed in pharmacies, tested by dermatologists, offering high-quality products with natural composition for sensitive skin (POP). Its main ingredient is the volcanic mineralizing water, rich in 15 rare minerals, reinforcing skin’s natural defenses against the harm of external factors while protecting the environment and promoting sustainability. (POD & Reasons to Believe)</td></tr>
</table>

Source: Author, 2019, Information provided by the Brand Manager of Vichy

3. Addressing the Work Project Objectives

To suitably address the Work Project’s objectives - finding the right category to attract younger consumers for the brand Vichy and understand how to retain them - a multi-perspective approach was conducted, combining qualitative and quantitative research.

3.1 Methodology

First, for the quantitative research, Maria Lourenço, Brand Manager of Vichy was interviewed, then consumers and possible consumers of the brand, and lastly, pharmacists. To quantify the insights from all the interviews, a survey was carried out. Store observations were considered because it produces reliable information on the consumers’ actual behavior, but then rejected since it would be difficult to carry out in a pharmacy, as the majority of the consumers have the cosmetics decisions and behavior in the balcony, when interacting with the pharmacist.

In the following Table 3, it is presented in detail each of the research methods.

Table 2: Methodology of Research Methods, Author, 2019

1. Interview with the Brand Manager of Vichy Interview the Brand Manager helps to gather specific insights about the brand from the company's side.	• **Details:** 1 interview with the Brand Manager of Vichy, to first understand how the brand wants to be perceived by consumers, and then compare with consumers' actual perception. • **Objectives:** To understand the company's perspective towards the brand Vichy and the category under analysis, clustering information on brand identity - what the organization wants the brand to stand for (Aaker and Joachimsthaler, n.d.), and Vichy's strategic positioning – according to Kotler and Keller, the "act of designing the company's offering and image to occupy a distinct place in the mind of the target market."
2. In-depth Interviews with Consumers and Potential Consumers of Vichy This qualitative method allows freedom for both the interviewer and the respondent to explore additional ideas. According to Kevin Keller, *"The advantage is that subjects may be less deliberate and more spontaneous in their reporting."*	• **Details:** 30 interviews, all held in Portuguese, ranging from mass-market consumers to premium ones. The candidates were chosen based on five filters: living in Portugal for the last 5 years; purchases/ decides about own cosmetic products; have less than 35 years old; bought or consumed cosmetic products at least once in the last six months; able to recognize the brand Vichy (Appendix 13). This way it was possible to select an adequate sample that is consistent with the research objectives while being as representative as possible. To guide the candidates during the interviews, an interview guide was used as a guideline (Appendix 14). The sample characterization is defined in Appendix 15. • **Objectives:** Collect insights concerning four main topics: Consumption behavior regarding cosmetic products, in order to know consumer's routines, category preferences and concerns related to it; Purchase behavior towards their preferred distribution channel, which was crucial to comprehend what consumers value most during the shopping experience; Relationship with pharmacies, which had the objective of understanding consumer's incentives and obstacles for consumption in this channel; Brands' image and experience, investigating respondents' preferred cosmetic brand, and what they know and feel about this brand compared to Vichy.
3. In-depth Interviews with Pharmacists This technique helps to analyze the behavior and main concerns of consumers since the majority of their decisions are made in the balcony, when interacting with the pharmacist.	• **Details:** 5 interviews with pharmacists working in the region of Lisbon: Algés, São Pedro do Estoril, Parede, Carnaxide, and Linda-a-Velha. The interview guide is detailed in Appendix 16. • **Objectives:** To understand pharmacists' perceptions on the skincare category and the different behaviors of consumers when purchasing this category; To analyze the relationship between pharmacies and the brand Vichy.
4. Survey According to Kevin Keller, quantitative measures *"definitively assess the depth and breadth of brand awareness and the extent and nature of brand relationships."*	• **Details**: 300 total responses, from which 170 were valid and 130 invalids (did not meet the filters' criteria). The filters used were the same ones as in the in-depth interviews with consumers. The online survey and the sample characterization can be found in Appendixes 17 and 18, respectively. • **Objectives:** To quantify each segment identified through the interviews; To look deeper into Vichy's penetration in the young cosmetic consumer's mind.

4. Research Limitations

During the development of this work project, two main limitations arose. First, the non-representativeness of the samples, both in qualitative and quantitative research, might have not covered all cosmetics' consumers' behavioral profiles. Meaning that relevant segments might have not been detected, and quantitative research may have been misleading in proportionating the segments. The majority of the respondents were my acquaintances, being represented within the same range of ages. With a bigger sample, it would be possible to detect different behaviors across different ages (since the purchasing power tend to increase when consumers get older - already working), giving more precise recommendations regarding the segments' demographic description. However, this sample turned out to be beneficial to address the objectives of this research – find a strategy for Vichy to attract and retain younger consumers for the brand. Second, the difficulty in finding current young consumers of Vichy, and pharmacies that would accept being interviewed, might have affected the insights collected regarding the brand. Nevertheless, this is general reality and explains why this research was conducted in the first place.

5. Research Insights

Deriving from the research conducted, different insights into the face care category and on the brand Vichy were collected. Firstly, the insights discovered from the interviewees (possible consumers and pharmacists) will be presented, followed by a division of the market into segments to better analyze the consumers' different needs and behaviors towards the category. Lastly, consumers' perception and image of the brand Vichy will be presented.

5.1 Insights on the Face Care Category

The majority of the respondents shared the opinion that face care is the most relevant category within the cosmetics market. From the thirty potential consumers, only two women chose other categories and all the five interviewed pharmacists mentioned face care as the most searched category in their pharmacies.

Table 4 below presents the main insights related to this category, that were mutual to the majority of the respondents (consumers and pharmacists), analyzes consumer's main concerns and influences, what they take into consideration during the purchase, their preferred channel and their different profiles.

Table 3: Consumers and Pharmacists insights on the face care category

A. Main concerns	1. Consumers are more aware of how external factors can damage their skin. Since face is seen by the majority of consumers as the most sensitive part of the human body, their main concerns are to hydrate, protect and clean it. • *"Nowadays with the rise of health problems related to sun exposure and pollution, my health is my priority and face is the most sensitive part of our body. That is why I hydrate, protect and clean it every day." (Female, 29, LRP)* o *"Nowadays consumers are increasingly informed of the importance of cleaning their skin. They know that investing in a product without using a cleanser is a waste of money. There is the awareness that each care requires a different product." (Pharmacist, Carnaxide)*
B. Sources of information and recommendation	1. Doctors' recommendations are one of the most important purchase drivers. • *"I trust my doctor 100%, if he recommends me a product, I will buy it for sure." (Female, 24, Uriage)* o *"If the product/brand is already indicated by their dermatologist, our advice is not worth it. Even if we recommend an identical product from another brand, there is no chance they will change their initial idea." (Pharmacist, Carnaxide)* 2. Consumers search for family/friends and pharmacists' recommendations and opinions. • *"I know doctors' advice sometimes is a bit biased, so I also like to know pharmacists' opinions." (Female, 24, Eucerin)* o *"Friends and family are crucial in their purchase behavior. They talk about their experiences and influence one another." (Pharmacist, Parede)* 3. After doing research and receive advices/recommendations about a product, consumers tend to look for online reviews to choose the brand. • *"First, I search for the specific product and then to choose the brand I search for reviews, not just from influencers but also from doctors. It's really important for me the opinion of other consumers, so normally I go at least to page 5 of customers' reviews." (Female, 23, Face Theory)* o *"They go online to compare the prices of different brands. Most of the time they come to the pharmacy knowing what brands they are interested, based on previous online research." (Pharmacist, Carnaxide)* 4. Samples and in-store experiences are within the main sources of information for consumers to get interested in cosmetic products and help them decide and learn between different brands. • *"(…) If someone gives me a sample of a brand I didn't try before and I like it, I will consider buying it." (Female, 29, Filorga)* o *"What they see in the pharmacy impacts their behavior. They see new brands and products highlighted in hotspots and immediately ask for samples." (Pharmacist, S. Pedro do Estoril)*

C. Main attributes valued	1. Price was mentioned by the majority of the respondents as an important factor when purchasing face care products. • *"The price is also important, that's why I try to avoid buying these products in perfumeries but in para-pharmacies or pharmacies." (Female, 24, Eucerin)* o *"Price is still very important for some consumers. A lot of times they come to the pharmacy to ask for advice but leave without doing any purchase. Probably they listen to our opinion but buy the product in a supermarket, where they can find cheaper products." (Pharmacist, Parede)* 2. Efficacy and the brand itself are within the most relevant factors when purchasing face care products in the pharmacy channel. • *"First quality, I don't mind paying a bit more if the product is effective." (Female, 23, Uriage)* • *"Usually I go for the brand. I tend to purchase products from brands I already know and have had a good experience with." (Female, 23, Uriage)* 3. Natural ingredients and sustainable movements impact consumers' brand choices. • *"If with natural ingredients better. I try to look for products with a higher natural composition and not animal tested." (Female, 31, Avène)* • *"The less environmental impact the better. If a good brand would start with refiled, I am almost sure I would try it." (Female, 23, Uriage)*
D. Pharmacies/ Para-pharmacies as main channels	1. Pharmacies/ Para-Pharmacies are seen as the channels that offer higher quality in skin care products. • "*I learned with my mother that it is better to be safe than sorry, and since pharmacies test all of their products, it has always been my first choice for cosmetics." (Female, 23, Uriage)* 2. Advices given by specialized pharmacists are one of the main incentives for consumers to purchase in the pharmacy. • *"A huge incentive for me is the know-how of the pharmacists. If I need help or advice between different brands and products, I know they will give me a good recommendation." (Female, 29, Filorga)* 3. Pharmacies are seen as not convenient nor efficient for some consumers. • *"We have to wait for our time, everything is too slow, and the offer is quite small. Furthermore, it's not convenient, I have to go there on purpose." (Female, 24, Nívea)*
E. Consumer's profile	1. There are different types of facial care consumers in the pharmacy. The brand loyal and the brand switcher: o *"Some consumers use the same brand for over 3 years. For these, although I give my advice, they are not willing to take the risk of trying a new brand. Others switch brands very fast. It is either because they don't see results, or because of the innovations that are constantly being launched." (Pharmacist, Algés)* The open-minded and the headstrong: o *"We have the headstrong clients, who come with their fixed idea, ask our opinion but do not change the final decision, and a more open-minded client, who even if it comes with a brand already chosen, if we give another one, changes his initial idea." (Pharmacist, S. Pedro do Estoril)*

Source: Authors, Based on primary research

5.2 Market Segments of the Face Care Portuguese Market

According to Keller, market segmentation is crucial for a firm to implement efficient and effective marketing programs. Segmenting the market requires dividing it "into distinct groups of homogeneous consumers who have similar needs and consumer behavior, and who thus require similar marketing mixes."(Keller 2013) The skincare market is highly competitive, being crucial to allocate the market expenditures effectively. The segmentation was based on the insights gathered during the qualitative research and each segment will be quantified by the results of the quantitative survey.

From the in-depth interviews, it was possible to draw patterns of similarity among the respondents, based on their needs and behaviors towards several factors. First, they were classified according to their main driver for the purchase of skincare, with four different answers being obtained: efficacy and efficiency of the products, the brand itself, advice from the doctor, and price as the most important factor. After the division of the market in these four groups, it was easier to define and analyze them, since the purchase driver is the main influence of their purchase behavior. Therefore, when analyzing the main concerns towards the facecare category - the degree of research before purchasing a product, price sensitiveness, favorite channel, and brands - it was possible to note that all these groups have different behaviors. As a result, four segments have been identified: 'Wise Efficacy-Seekers', 'Pharma One-Branders', 'Derma-Followers' and 'Convenient Deal-Seekers' (Appendix 19).

The following four tables describe each of the segments in detail, concerning their weight in the quantitative survey sample, their main purchase driver, loyalty towards a brand, main concerns regarding the facecare category, other relevant pharma categories, purchase influencers, preferred channels and brands, and other additional insights.

'Wise Efficacy-Seekers' is the most informed segment. These consumers are mainly driven by the efficacy and results of the products, always searching for information and recommendations to choose the final product and/or brand.

Table 4: 'Wise Efficacy Seekers' Overview

Wise Efficacy-Seekers	
% of the sample	29%
% of Vichy's regular consumers	4%
Main purchase drivers	Efficacy is the most important driver. Value efficiency and efficacy/results of the products over the price. Sustainable impact and natural ingredients positively impact their choice.

Consumer profile	Brand switchers – quality-oriented, not loyal to a brand. • *"I usually use a brand for a few months to test how my skin reacts to it. Since I haven't found the perfect brand yet, for now, I'm a brand switcher." (Female, 23, Face Theory)*
Main concerns	Hydrate, protect and clean their skin.
Pharma categories used	78% use pharma face care products in a daily routine. 59% are currently using pharma sun care. Some consumers mentioned using these products not just in the summer, but also during the rest of the year.
Research routine	Extremely informed segment. Before choosing a product or a brand, they always search for information and recommendations, mainly through online research. They also rely a lot on pharmacists' advice. • *"I start with online research on different websites, and sometimes I go to Instagram to check specific bloggers' profiles. After I check online reviews, done by consumers and if possible, by doctors. When in the pharmacy, I always like to know pharmacists' opinions." (Female, 23, Uriage)*
Preferred channels	Pharmacies (50%) are the preferred channel. Specialty stores (21%) and Para-Pharmacies (17%) come after.
Preferred brands	Uriage, Avène, Caudalie, Filorga, La Roche Posay
Additional insights	1. Samples are a crucial factor to try a new product/brand. They try the sample at home and if they like the reaction, the chances of buying the product increase. • *"I usually ask for samples before I purchase new products. This way I can test their quality and their reaction when applied to my skin." (Female, 31, Avène)* 2. Price is an incentive to buy in pharmacies rather than in specific channels, since the former offer tested and controlled products at much lower prices. • *"That's why I try to avoid buying this type of products in perfumeries but in para-pharmacies or pharmacies since they offer high-quality products at lower prices." (Female, 24, Eucerin)* 3. Extremely influenced by advertisements. They are not attached to a specific brand, being impacted by the ones that focus on strong decision variables for them. • "*Recently, I saw a Proactive advertisement on Instagram, where Kendall Jenner shows her acne situation, before and after using this product. Now I just want to finish the brand I am currently using to try this one." (Female, 23, Face Theory)*

Source – Authors, based on primary research

The 'Pharma One-Branders' purchase brands they trust, mainly in the pharmacy channel. These consumers tend to buy different products but all from the same brand.

Table 5: 'Pharma One-Branders' Overview

Pharma One-Branders	
% of the sample	33%
% of Vichy's regular consumers	11%
Main purchase drivers	The brand itself. Only buy the brands they trust. Then the quality-price ratio of the product is considered.
Consumer profile	Brand loyal - Use different products, but all from the same brand. • *"When I try a new product from a different brand and I like it, I will probably buy the other products I use from this same brand." (Female, 23, Uriage)*
Main concerns	Hydrate, protect and clean their skin.

Pharma categories used	88% use different pharma face care products in their daily routine. 88% also use pharma sun care. Some consumers mentioned using these products not just in the summer, but during the rest of the year.
Research routine	Don't search for information to choose the product. They ask their friends & family for recommendations and also rely a lot on pharmacists' advice. • *"Most of the times I ask the pharmacist his opinion. If the recommendation is a brand I already know, I will consider buying it." (Female, 23, Uriage)*
Preferred channels	Pharmacies (56%) and Para-Pharmacies (22%) are the main channels.
Preferred brands	Bioderma, Avène, Uriage
Additional insights	1. The main incentives to purchase in pharmacies are the reliability of the products, and also because pharma brands have higher ranges of products than the other channels. 2. Price is an important factor when undecided between two brands. • *"Inside the brands I have a good experience with, I buy the one that is in promotion." (Female, 23, Uriage)* 3. Not affected by advertisements when it comes to face care products but might be impacted when it comes to other categories. • *"I'm not influenced at all by face care advertisements, but I'll probably be if I see a make-up product being advertised." (Female, 23, Bioderma)*

Source – Authors, based on primary research

'Derma-Followers' are the consumers that follow exactly their doctors' recommendations, purchasing the products and brands prescribed, without considering any other factor.

Table 6: 'Derma-Followers' Overview

Derma-Followers	
% of the sample	7%
% of Vichy's regular consumers	0
Main purchase drivers	The only purchase driver for these consumers is their Doctor's advice. All the products/ brands they purchase are prescribed. If the reaction is good, they keep using the same product for years, without considering any other factor. • *"It was prescribed by my dermatologist and I liked the results. Since then I kept using this same brand for over 3 years now." (Female, 19, Bioderma)*
Consumer profile	For the prescribed products, they are 100% brand loyal. • *"If the pharmacy closest to my house doesn't have the products my doctor prescribed, I will search in another one." (Male, 25, Avène)*
Main concern	Always related to dermatological specific skin problems, such as acne or allergies. • *"I am allergic to all mass-market creams, so they must be specifically from the pharmacy and recommended by my doctor." (Male, 25, Avène)*
Pharma categories used	Usually skin related categories: facecare, bodycare, and suncare.
Research routine	The purchase choice is only driven by their doctors' recommendations. Since they are extremely influenced by them, they believe the products recommended are the best for their skin, and as a result, they don't take into account any other source of information or advice. • *"I blindly trust in my doctor. I buy exactly what he prescribes me, without doing any research about the product." (Male, 25, Avène)*
Preferred channels	Pharmacies (83%) and Para-Pharmacies (17%) are the preferred channels.
Preferred brands	Uriage, Bioderma, Isdin, La Roche Posay

Additional insights	They switch their purchase between pharmacies and para-pharmacies, depending on the channel that is doing higher promotions. • *"If Wells is doing promotions on my product, I go there, but if pharmacies are doing a pay 1 get 1 free, I'll go to the pharmacy." (Male, 25, Avène)*

Source – Authors, based on primary research

'Convenient Deal-Seekers' is the segment that is mainly driven by the price and convenience of the products, doing the majority of their purchases in the supermarket.

Table 7: 'Convenient Deal-Seekers' Overview

Convenient Deal-Seekers	
% of the sample	31%
% of Vichy's regular consumers	0
Main purchase drivers	Price and Convenience are the main drivers for the purchase. When at the supermarket, they go directly to the articles in promotion. Then, they choose the brand they like the most, mainly for the fragrance of the product.
Consumer Profile	Not loyal to a specific brand, since they often choose based on promotions. • *Most of the time I buy Nivea, the most convenient and cheapest brand. However, if there is another brand in promotion, I open the article and smell its fragrance, if I like it, I will probably buy it." (Female, 23, Nívea)*
Main concerns	Most of these consumers do not have a face care routine. A cream to hydrate their face is more than enough
Pharma categories used	Most of them buy cosmetics in the supermarket, but 36% have already bought face care in the pharmacy.
Research routine	Do not have. These consumers are not influenced by anyone. They decide which products to buy in the right moment, when in the corridor of the articles in promotions. • *"I don't search for information nor recommendations. I like to choose what to buy when I'm at the supermarket." (Male, 23, Nívea)*
Preferred Channels	Supermarkets are the preferred channel (73%), followed by para-pharmacies (15%).
Preferred Brands	Nivea, Garnier, Simple
Additional insights	1. Convenience and price are the main obstacles to purchase in the pharmacy. • *"I just go to the pharmacy to buy medical pills. It's not convenient at all to go there just to buy a moisturizer, since I can also find them at Continente, at much lower prices." (Female, 23, Nívea)* 2. As they choose what to buy based on promotions, advertisements don't have an impact on them.

Source – Authors, based on primary research

5.3 Consumers Insights on the Brand Vichy

From the in-depth interviews with potential consumers, four key findings on the brand Vichy were extracted, further detailed in Table 9 below.

Table 8: Consumers Insights on the Brand Vichy

1. Low brand recall and penetration
From the interviews, it was possible to conclude that Vichy is not capturing the attention of the younger generation (18-35 years old). When asked the top of mind pharma cosmetic brands, only a few respondents mentioned Vichy. Moreover, although some have mentioned that sometimes use their mother's products, none of the interviewees have purchased the brand for themselves. Since they associate Vichy to a brand for elderly women, the name of the brand is rarely mentioned in conversations with their peers, blocking the awareness and consequently the brand interest. According to a report published by McKinsey, "people form impressions of brands from touchpoints such as advertisements, conversations with family and friends, and product experiences" and these impressions will be crucial for the first stage of the consumer decision journey – Consideration set. Therefore, younger face care consumers are not even considering Vichy at the earliest stage of their decision journey (Appendix 20). - *"If someone had recommended me a product from Vichy, maybe I would try it, but I never heard a friend talking about it." (Wise Efficacy-Seeker, 23)*

2. A brand for elderly women
All the respondents associate Vichy to a brand for elderly women, mainly related to their position in anti-age and anti-wrinkle products, and for being their mother's brand. When asked the question, "If Vichy was a person what kind of person would it be?", the answers started with "A classic lady in her late 40's" or "A mother with 50 years old". During the interviews, words like "anti-wrinkle", "mother" and "classic" were in the most mentioned ones. - *"I immediately think in anti-wrinkle creams. I associate this brand to my mother." (Pharma One-Brander, 23)*

3. High prices perception
Most of the respondents mentioned Vichy as an expensive brand. Even when compared to other pharma brands such as Avène and Uriage, Vichy was considered as the one with the highest prices. When the projective technique comparison was done, Vichy was defined as "a businesswoman, driving a Class A" or "Working in a top position, driving a Porsche Cayenne", while the other 2 brands were described as more modest and casual "she is still studying and drives a Fiat 500" or "she works in a pharmacy and drives a Ford Focus." The high prices association were mainly related to the package being made of glass and also for being the respondents' mother's brand. - *The packaging looks expensive. Maybe the fact that they are glass jars and not tubes. It seems I have to open everything very carefully." (Pharma One-Brander, 23)* - *"Never used, but I associate it to a mothers' brand, with expensive products." (Derma-follower, 25)*

4. Reliable and Safe brand
The majority of the interviewees described Vichy as a safe and reliable brand, offering high-quality products since it is tested by dermatologists. The ones that already used the brand, mentioned to sometimes use their mothers' products because they like how their skin reacts to them. - *"The first words that come to my mind are safety and reliability, not just because Vichy is sold in pharmacies, meaning that all the products are tested by dermatologists, but also because it's my mother's brand." (Pharma One-Brander, 23)*

Source: Authors, based on primary research

To understand how the brand is perceived among different consumers, and if it is in line with the brand identity, brand image has to be analyzed, "as reflected by the brand associations held in consumers' memory."(Keller 2013) Each person forms their associations with a brand, according to their personal needs and preferences. Therefore, each of the segments perceives the brand Vichy differently. The insights obtained are summarized in Table 10 below.

Table 9: Vichy Brand Image per Segment

Wise Efficacy-Seekers
Positive Image. See Vichy as a reliable (but for elderly women) brand, offering high-quality products. - *"High-quality pharma brand (...)" (Female, 31, Avène)* - *"Would be like Meryl Streep, always taking care of her skin with anti-wrinkle products." (Female, 23, Face Theory)*

Pharma One-Branders
Positive Image. See Vichy as a safe (but expensive and for elderly women) brand, offering high-quality products. - *"The first words that come to my mind are safety and quality (...)" (Female, 23, Uriage)* - *"I never bought them because I know they are expensive, but my mother uses, so the quality must be good." (Female, 23, Uriage)*

Derma-Followers
Negative Image. Just buy prescribed brands and Vichy is rarely recommended by the doctors. - *"I already used a face wash cleansing from Vichy, but when I asked my doctor for advice, he recommended another brand." (Female, 19, Bioderma)*

Convenient Deal-Seekers
Negative Image. See Vichy as a non-convenient brand and that its quality does not justify the price. - *"I wouldn't go to a pharmacy just to buy a Vichy moisturizer. Supermarkets are already offering a lot of them, with good quality and at much lower prices." (Female, 23, Nívea)*

Source: Authors, based on primary research

5.4 Target Market for Vichy in Portugal

After segmenting the market, it is crucial to select the target segments. According to Philip Kotler (2013), targeting is the "framework for success in the marketplace." It is "the process of evaluating each market segment's attractiveness and selecting one or more segments to enter." Different segments have different behaviors and require different benefits from the products. Therefore, for Vichy to concentrate the marketing efforts effectively, to attract younger consumers for the brand, it is crucial to focus on the segments whose needs and desires most closely match the brand's offerings, meaning the ones who do not reject the possibility to purchase Vichy. For this reason, 'Derma-Followers' and 'Convenient Deal-Seekers' should be excluded, since the former solely buys prescribed brands and Vichy is one of the least viewed brands in prescriptions (which is hard for the brand to change in the short run), and the latter do not purchase pharma cosmetics since for them the quality of the products does not justify the expensive prices. Therefore, Vichy's target market comprises both 'Wise Efficacy-Seekers' and ‘Pharma One-Branders’, since they are the segments most likely to purchase Vichy. The former values the efficacy and efficiency of the products the most and sees Vichy as a reliable and high-quality pharma brand, and the latter uses products from brands they trust and have had a good experience with and perceives Vichy as a safe brand offering high-quality products.

4.5 Pharmacies’ Relationship with Vichy

From the information provided by the L’Oréal Corporation Presentation (2019) and the insights from the interviewed Pharmacists during the research, it was possible to understand that Vichy has been suffering some issues in making itself perceived as an attractive brand for dermo-advisers (pharmacists or other dermatological experts present in the pharmacy). In Table 11 below are summarized the key findings that explain why Vichy is not being recommended by dermo-advisers.

Table 10: Vichy's Relationship with Pharmacies

1. Brand with low credibility Credibility is a crucial point for dermo-cosmetics brands. If a product is often prescribed, it will bring confidence to the pharmacy personnel to later recommend the product/ brand. According to the information given by L’Oréal, only 0,3% of the Portuguese doctors recommend Vichy in their prescriptions. Bioderma is the most often prescribed (45,7%), followed by La Roche-Posay (36,6%) (Appendix 21) • *“If it is for a specific skin ‘issue’ such as acne, doctors recommend other brands like Bioderma. Vichy does not offer products targeting these specific pathologies.” (Pharmacist, Carnaxide)*
2. Brand with low efficacy perception Regarding the products, dermo-advisers value the ones offering high efficacy and very well tolerated by the skin. Vichy is the brand that worse response to these needs. (Appendix 22)
3. Importance of product trial for dermo-advisors For the dermo-adviser to recommend a product, it is important to have tried it before. Therefore, they consider it crucial to receive products/samples from the brands. For Vichy, this is a point for improvement, since it is still not strongly associated with the brand (Appendix 23)
4. Training is essential to communicate the brand Offering samples to be given to consumers, training courses and updated information about the brands’ assortment and innovations is truly valued by dermo-advisors. These tools give them more confidence when recommending a brand to a client. Although Vichy is one of the brands that better performs on those criteria when compared to other pharma brands, it still has a lot to improve. (Appendix 24) • *“We stopped working with Vichy for various reasons. We don't have any kind of follow up. I should favor a brand that gives me a professional follow up and more training.” (Pharmacist, Algés)*

6. Recommendations

The insights provided by consumers and pharmacists suggest that Vichy has to significantly increase the awareness within the younger generation (18-35 years old), to become a top of mind brand for the target market. Therefore, recommendations will consist of developing a better relationship with clients – pharmacies and with the final consumer. By addressing them, Vichy will be able to better achieve their targets' desires.

6.1 Recommendations to Strengthen Vichy's Relationship with Pharmacies

Pharmacy personnel must improve their perception towards Vichy, as this will result in them being more willing to recommend the brand which will in turn increase consumers' awareness and consequently sales. To make the sales of Vichy more attractive for pharmacies, it is suggested to strengthen medical representatives' visits, create a site to engage pharmacists as well as organizing an annual event. This incentivizing system can be a way to boost the channel and motivate pharmacists to make a bigger effort in the selling process. The recommendations are summarized in the following Table 12.

Table 11: Recommendations to Strengthen Relationship with Pharmacies

1. Strengthen medical representatives' visits	To influence and increase the share of recommendations of the Vichy's products, the brand has to strengthen the medical representatives' visits. To build new and existing relationships with doctors, delegates have to meet doctors (dermatologists and gynecologists) more often and present them Vichy's most strategic products for that specific specialty. These visits should be done as much as possible because when doctors start perceiving Vichy as an effective and credible brand, pharmacists will be more confident in recommending it.
2. A site to engage pharmacists	Create a site where only pharmacists can apply. Two in two months, questions related to the brand Vichy (innovations, specific products, categories and other interesting facts about the brand) will have to be answered. The best twenty pharmacists receive two Vichy's products chosen by them. This will motivate pharmacists in getting to know better the brand, stimulating their relationship with Vichy.
3. Annual Event	To develop Vichy's relationship with pharmacies, an annual event should be organized, giving a prize for the three best Portuguese pharmacies. During the year, groups of three pharmacists (working in the same pharmacy) will compete for the annual event. During this period, the teams will answer interesting questions and do videos (all about Vichy's products and categories) and the thirty best groups are selected for the final day. In this day, the selected teams will run some tests (answer quizzes with specific questions about the categories/ products of Vichy), and the three winners receive: 1st prize: 4 days holiday in Vichy's spa in France for the group, and 10% margin on the next year's orders for their pharmacy. 2nd-3rdprize: 10% margin on the next year's orders for their pharmacy.

6.2 Recommendations to Strengthen Vichy's Relationship with Final Consumers

As it was mentioned before, from the insights provided in the primary research, it was possible to understand that younger face care consumers are not even considering Vichy in the first stage of their decision journey. According to McKinsey, the decision-making process starts with the Consideration Set, where "The consumer considers an initial set of brands, based on brand perceptions and exposure to recent touchpoints." The lack of Brand Awareness, more specifically low Brand Recall, is excluding Vichy from this stage. For this reason, recommendations will be given to increase the awareness of Vichy within these targets at the same time as building a positive brand image. This way Vichy will be able to move further into the evaluation phase, where consumers start to get interested in the brand.

6.2.1 Recommended Categories Within Vichy's Portfolio

Each brand has its strategy in terms of its products and communication architecture. According to Kapferer, Vichy follows the range brand strategy, meaning that it combines all their products in a unique principle (brand concept). The Vichy's products are structured by a way of lines, "putting together products which are undoubtedly heterogeneous, but all of which have the same function."(Kapferer 2012) Therefore, Vichy has been communicating generically, focusing their advertisements only in specific products of their total range. Although in the last months it has also been focusing on Minéral 89 campaigns, the majority of Vichy advertisements were related to anti-age products, consequently attracting elderly consumers. For the brand to draw the attention of the younger generation, two categories are recommended in Table 13 below.

Table 12: Recommended Categories Within Vichy's Portfolio

Minéral 89
• Details: Minéral 89 is powered by a combination of natural origin hyaluronic acid and 89% Vichy thermal mineralizing water. Together they hydrate and plump skin with moisture and act as a protective shield against daily aggressors, such as pollution. • Relevance: According to primary research, 'Wise Efficacy-Seekers' and 'Pharma One-Branders' main concerns are to hydrate, clean and protect their skin, because they are aware of how external factors may damage it. Also, both segments value the efficacy and efficiency of the products, with the former always searching for online information and reviews about the products. As mentioned in the Vichy's website, these products are extremely effective, offering immediate results. Although this category was recently launched, it has already 633 reviews on its website, with an average rating of 4.7 out of 5. Since both segments follow peers' recommendations and this category is already having positive feedbacks (Appendix 25), Vichy should focus on increasing the awareness and benefits of these products, to attract younger consumers.

Solar Protective Water – Ideal Soleil
• Details: High protection suncare for face and body in a solar water format, hydrating and protecting the skin. Enriched with spectrum UV filters and suitable for every type of skin, this spray is lightweight and quickly absorbed. • Relevance: From the insights from both, potential consumers and pharmacists, it was possible to understand that the younger generation is increasingly getting importance in protecting their skin from the UV rays at the same time as being concerned in protecting the environment. Both segments purchase sun care products in the pharmacy, mentioning to use it not just in the summer but also during the rest of the year. According to Vichy's website, these products have "environmentally friendly formulations, ensuring an average biodegradability rate of 91% for our rise-off formulas." However, these benefits are not being communicated. It is therefore important to first increase awareness, and then make consumers relate with them, increasing the interest and purchases of the solar protective water products, by communicating their main benefits.

5.2.2 Recommended Communication Strategy and In-Store Promotion

According to Keller, the power of a brand lies in the result of customers' experiences over time (Keller 2013). Therefore, a brand must create the right type of communication programs, experiences, and events, so that the desired thoughts, feelings, beliefs, and opinions become linked to the brand. The recommended communication strategy and in-store promotion are presented in the following Table 14.

Table 13: Recommended Communication Strategy and In-store promotion for Vichy

Recommended Communication Strategy
Phase 1 – Focus on Brand Image and establish the depth of Brand Awareness. • **Objectives**: Store Vichy correctly in the consumers' mind, by communicating the brand's main attributes: tolerance, efficacy and expertise and how the brand is based in natural sources, at the same as enhancing credible reasons for choosing the brand, Vichy volcanic mineralizing water as the main ingredient and their sustainable beauty movements. • **Audience**: 'Wise Efficacy-Seekers' and 'Pharma One-Branders' • **Concept, Message, and Channels**: Create touchpoints between the brand and potential customers, providing detailed information about the brand's products and categories. This phase will be comprised of two ideas, an event for consumers to get to know Vichy better, and a sampling of Minéral 89 and Solar Protective Water products. 1. Event with young potential consumers giving a prize for the 2 best players. It will be communicated on the Vichy's website, Instagram Ads and stories from young influencers. From all the candidates, 40 will be randomly selected for the event. The purpose is for the candidates to study the brand since the event will consist of questions and tests about the products, categories, and values of Vichy, as well as promoting health consciousness, inviting leading physicians to share their expertise on skin care during the event. 1st prize: 4 days holiday in Vichy's spa in France and a basket with Vichy products; 2nd prize: a basket full of Vichy products; all the other players will receive a product chosen from Vichy. The outcome consists of making consumers perceive the brand as safe and reliable, but also for younger women (relating them to the brand). It will create buzz, increasing the interaction of consumers with Vichy and this way, increase awareness and interest around potential consumers. 2. Sampling: According to the interviews' insights, people are demanding samples to experiment for new brands and products. Sampling helps consumers create strong, relevant brand associations at the same time as kick-starting word-of-mouth among them. However, to maximize brand equity, it is important to be

precise about where and how the samples are going to be delivered (Keller 2013). Therefore, to reach younger potential customers and improve the cost-effectiveness of the Minéral 89 and the Solar Protective Water products, samples will be ordered on the Vichy's website, Instagram Ads and stories from influencers, increasing the awareness of these categories among young women.

- **Duration**: 1 month

Phase 2 - Focus on Brand Image. Communication of the efficacy and tolerance of both Mineral 89 and Solar Protective Water products, and the biodegradable formula of the latter.

- **Objectives**: Prove the quality and benefits of the products, through intention and behavior communication, to obtain brand preference and purchase from consumers.

For Solar Protective Water

- **Audience:** 'Wise Efficacy-Seekers' and 'Pharma One-Branders'
- **Concept, Message and Channels:** Promote through social media display ads (Youtube, Instagram and Facebook) the benefits of each of the three products, and out of home (muppies close to universities, gyms and bus stations) the three products together with the message "Cuidar de si e do ambiente é algo que a Vichy tem presente." ("Taking care of you and the environment is what Vichy does (Appendix 26). With this communication, younger consumers will find credible reasons to choose these products from Vichy.

For Minéral 89

- **Audience:** 'Wise Efficacy-Seekers'
- **Concept, Message, and Channels:** Based on primary research, 'Wise Efficacy-Seekers' always search for online reviews, not just from other consumers but also from doctors. Thus, a consultant dermatologist will be invited to talk about Minerál 89 products in Vichy's Instagram and Facebook account, to prove the effectiveness and the positive and rapid results of the products. The video will have the description "Tudo sobre Minéral 89" ("Everything about Minéral 89") and it will consist of explaining the benefits of the products, how to use them and in which part of the skin care routine it should be applied. This way, a more real and close message will be delivered to consumers, making them prefer and more willing to purchase this product.
- **Duration:** 2 months

Recommended In-Store Promotion

As believed by primary research, price is an important factor in cosmetic consumers' decisions. The 'Pharma One-Branders' are more sensitive to the price, making their final brand decision in the store. One of their main causes for the non-consumption of Vichy is the perception as an expensive pharma brand. Point-of-purchase advertisings influence and increase consumers' spontaneous and planned buying decision. Therefore, promotions are recommended.

According to Kevin Keller (2013), promotions "change the behavior of consumers so that they buy a brand for the first time, buy more of the brand, or buy the brand earlier or more often." To increase visibility, interest, and preference mainly from this segment, a special kit should be created, since they like to use different products from the same brand, and the price is always taken into consideration. From the insights of the primary research, the main concerns of both segments are to hydrate, clean and protect their skin. Therefore, it will be a "by 1, get 1 for free" promotion, composed of 2 products, one Minéral 89 product (hydrates) and a sun care (protects) for free. A message is going to be included – "First I strengthen, then I protect" ("Primeiro eu fortaleço, depois eu protejo"), encouraging consumers to try and buy these two products.

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Finding the best strategy for Vichy to attract younger consumers in Portugal

An analysis of consumers and categories in dermo-cosmetics

APPENDICES

CONFIDENTIAL

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A Project carried out on the International Master in Management Program, under the supervision of:

Lena Kemna

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Source: L'Óreal Corporation Presentation (2019)

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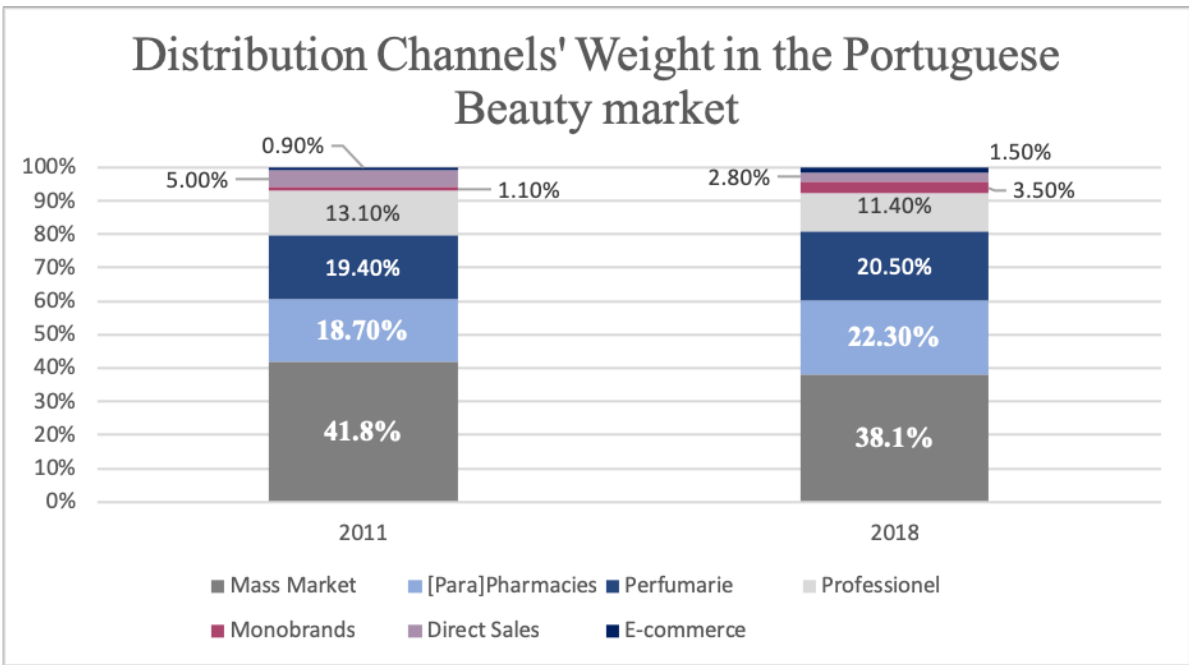
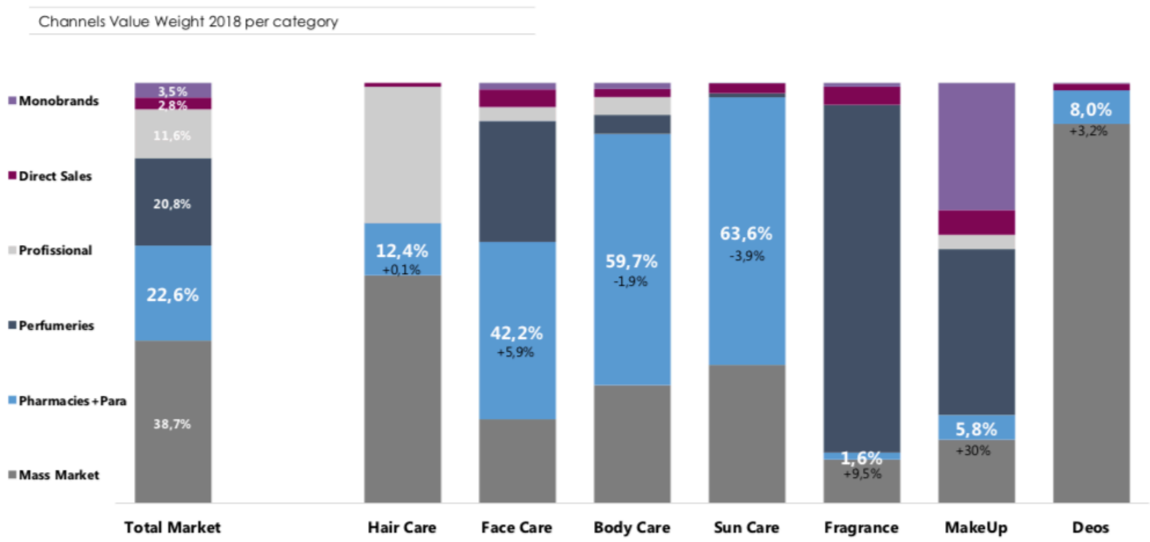


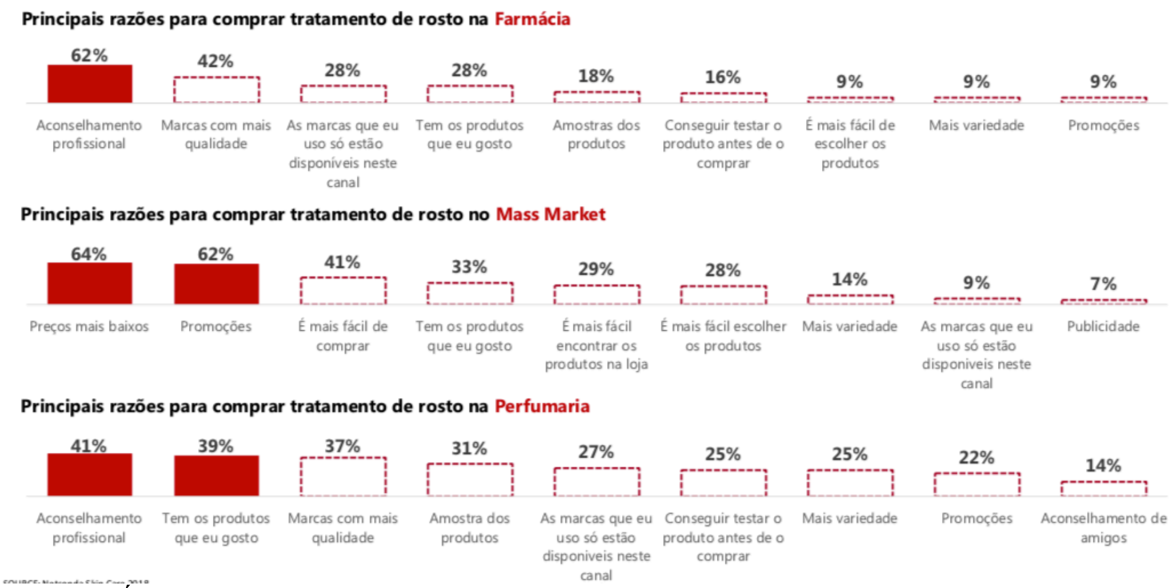
Source: L'Óreal Corporation Presentation (2019)

Appendix 3 – Channels Value Weight 2018 per Category



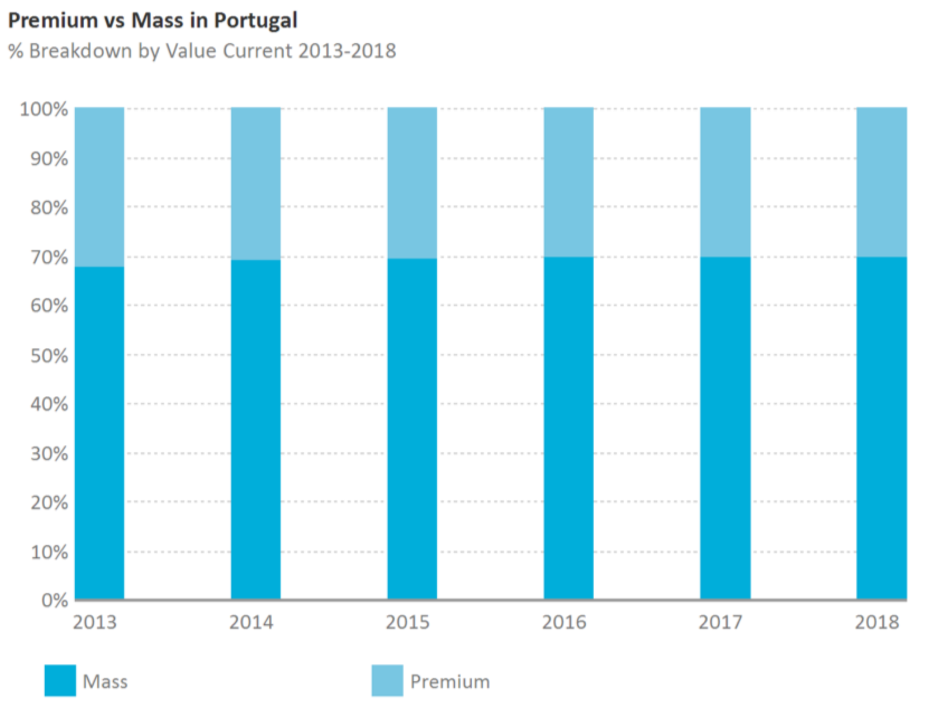
Source: L'Óreal Corporation Presentation (2019)

Appendix 4 – Drivers Affecting the Purchase Decision per Channel



Source: L'Óreal Corporation Presentation (2019)

Appendix 5 – Premium vs Mass Skin Care in Portugal



Categorization Type	2013	2014	2015	2016	2017	2018
Mass	67.5	68.9	69.2	69.5	69.6	69.6
Premium	32.5	31.1	30.8	30.5	30.4	30.4

Passport

Source: Euromonitor, 2019

Appendix 6 – Categories Value Weight in the Portuguese Cosmetic Market

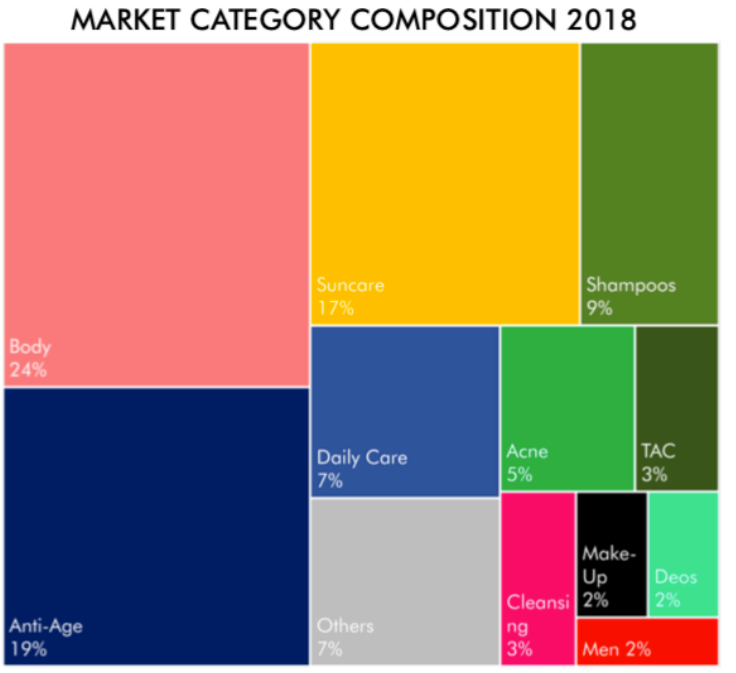
CATEGORIES VALUE IN THE COSMETIC MARKET

	2014	2015	2016	2017	2017 Vs 2016	2018	2018 Vs 2017	T2019
TOTAL HYGIENE MARKET							1,2%	
Hair Care	224	226	227	227	0,1%	233	2,8%	243
Total Face Care	185	186	185	194	5,0%	202	3,6%	209
Face Care Soin	*167*	*167*	*165*	*172*	*4,2%*	*178*	*3,4%*	*184*
Face Care Toilette	*18*	*20*	*20*	*22*	*11,0%*	*24*	*5,6%*	*25*
Perfumes	122	125	131	139	5,4%	142	2,5%	146
Body	93	100	102	107	5,1%	104	-2,8%	108
Make Up	87	92	99	99	0,2%	103	4,0%	107
Deos	56	58	58	62	5,5%	61	-1,6%	62
Sun Care	44	59	64	63	2,8%	59	-5,4%	63
Shower Gel	50	53	55	57	5,4%	58	0,1%	59
Coloration	43	44	43	45	2,7%	45	1,5%	47
Styling	32	33	32	31	-2,9%	30	-2,5%	29
Shaving and After Shave	20	21	19	17	-9,4%	16	-7,1%	15

Total Hygiene Market = Hair Care + Styling + Coloration + Face Care + Body + Sun Care + Make Up + Deos + Perfumes + Shaving + After Shave + Hands + Shower Gel

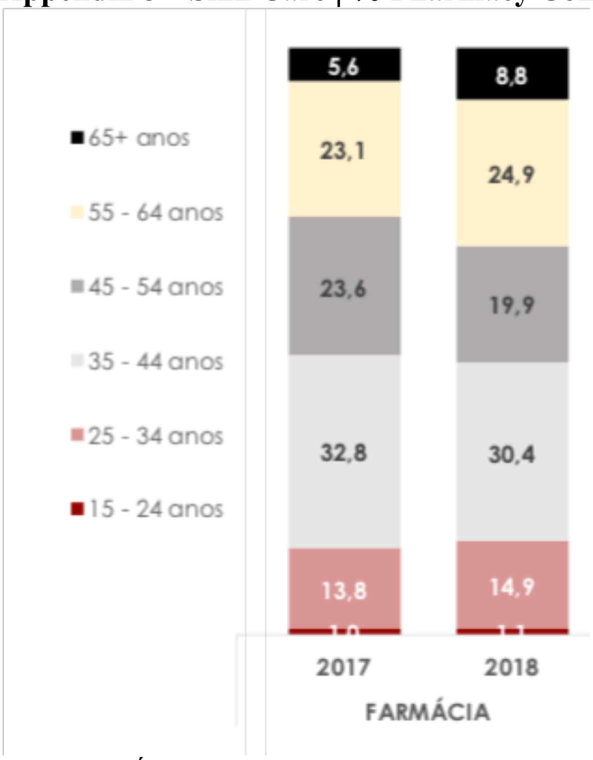
Source: L'Óreal Corporation Presentation (2019)

Appendix 7 – Dermo-cosmetic's Market Portfolio



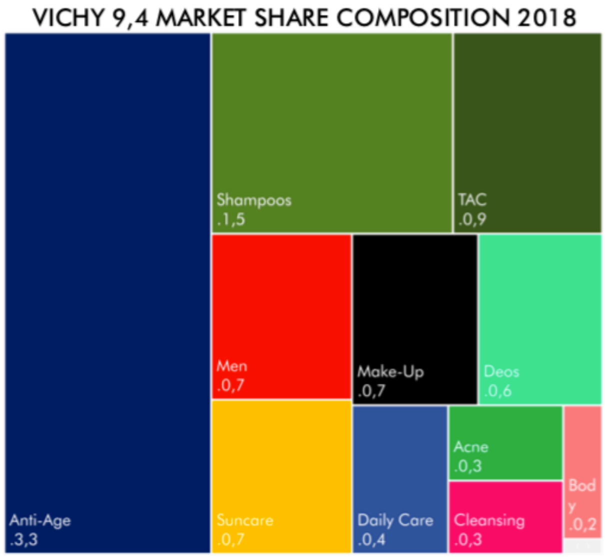
Source: L'Óreal Corporation Presentation (2019)

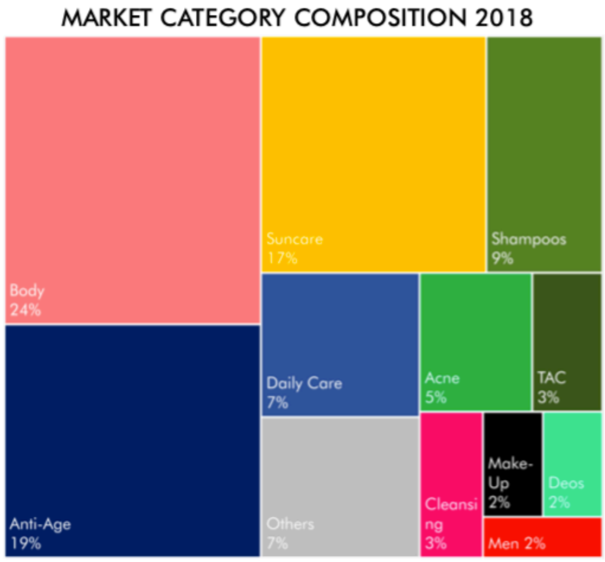
Appendix 8 – Skin Care | % Pharmacy Consumers per Age | 2018 vs. 2017 | Women



Source: L'Óreal Corporation Presentation (2019)

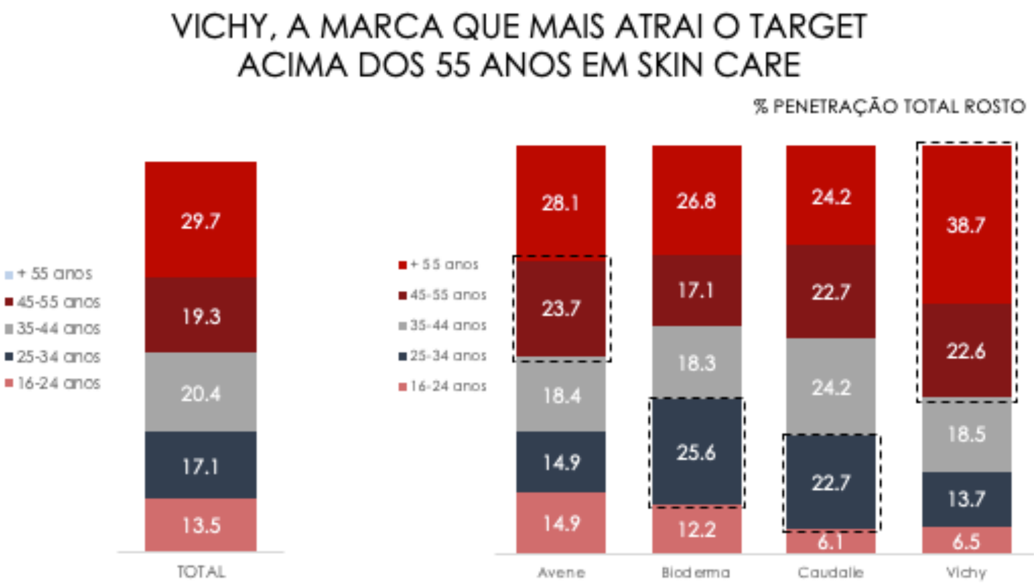
Appendix 9 – Vichy and Market's Portfolio





Source: L'Óreal Corporation Presentation (2019)
Note: The body category has already been discontinued from the Vichy's portfolio.

Appendix 10 – Vichy Facial Care Target



Source: L'Óreal Corporation Presentation (2019)

Appendix 11 - Vichy's Face Care's Categories' Portfolio

Face Care

Anti-Age		Product type*
Neovadiol Menopausal Skin Care		Serum, Moisturizers & Day cream, Night cream, Eye care
Liftactiv Antiaging Skin Care		Serum, Moisturizers & Day cream, Night cream, Eye care
Slow Age Antiaging Skin Care		Moisturizers & Day cream, Eye care
Idéalia Brightening Skin Care		Serum, Moisturizers & Day cream, Night cream, Eye care

Hydration		Product type*
Aqualia Thermal Hydrating face moisturizers and face creams		Moisturizers & Day cream
Nutrilogie Face moisturizer for dry skin		Moisturizers & Day cream

Minéral 89 Hydrate, plump and fortify skin		Serum

Acne		Product type*
Normaderm Skin care and moisturizers for oily skin		Moisturizers & Day cream, Cleansers & Make-up removers

Face Cleansing		Product type*
Pureté Thermale Face cleansers & face toners for healthy skin		Cleansers & Make-up removers
Masks To get a radiant and younger-looking skin		Cleansers & Make-up removers

*

Cleansers & Make-up removers – "Thoroughly purify and refresh your complexion with expert cleansing and makeup removal products suitable for sensitive skin."
Eye care – "Reduce the signs of aging."
Face Masks – "Deeply hydrate, rejuvenate and repair skin."
Moisturizers & Day cream – "Hydrating products adapted to your skin type and lifestyle for maximum effect."
Night Cream – "Nourish, hydrate and replenish your skin while you sleep."
Serum – "Preserve the youthful look of your skin. Address skincare concerns including dehydration, wrinkles and fine lines."

Sun Care

Sun Care		Product type*
Idéal Soleil To hydrate, care for and protect all the family		Face and Body sun care
Capital Soleil Sun protection		Face and Body sun care

Make-Up

Sun Care		Product type*
Dermablend Corrective high coverage make-up		Foundation, Concealers, Setting Powder
Minéralblend Make-up to hydrate		Pounder, Foundation
Naturalblend Natural blends		Lip balms

Hair Care

Hair Care		Product type*
Dercos hair concerns including dandruff, hair loss and damaged hair		Shampoo, Conditioner

Deos

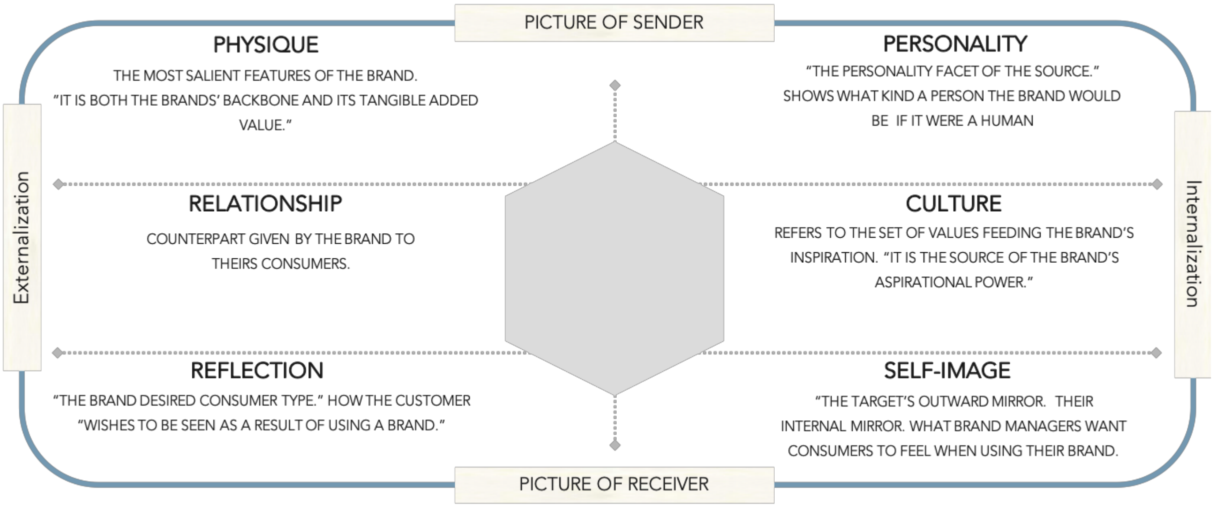
Deodorants		Product type*
For every type of skin		Deodorants

Men

Men		Product type*
Vichy Homme Specific for men's skin		Deodorants, Moisturisers, Shower gel, Shaving Foam

Source: Vichy's Website

Appendix 12 – Brand Identity Prism Theory



Source: Jean-Noel Kapferer (2008). *The New Strategic Brand Management*

Appendix 13 - Pre-recruiting Questionnaire

This questionnaire is part of a research project from NOVA School of Business and Economics and has the objective to recruit the accurate sample to conduct in-depth interviews. All the information provided will remain anonymized.

To get the necessary insights, the interviewees were selected based on 5 filters:

Filter 1: Have you been living in Portugal for at least the last 5 years?

→ If NO, do not proceed to interview

Filter 2: Do you purchase/decide about your own cosmetics?

→ If NO, do not proceed to interview

Filter 3: Do you have less than 35 years old?

→ If NO, do not proceed to interview

Filter 4: Have you bought or consumed cosmetic products at least once in the last 6 months?

→ If NO, do not proceed to interview

Filter 5: From the following list of cosmetic brands, which ones do you know? (Show list of different cosmetic brands)

→ If has not selected the Vichy brand, do not proceed the interview

Appendix 14 - Interview Guide with Consumers and Potential Consumers

Introduction

First of all, I would like to thank you for agreeing to be part of my work project, from NOVA School of Business and Economics. I am conducting a research about the consumption of cosmetic products in Portugal. The purpose of this research is not only to understand the consumption and purchase behavior of consumers in this market, but also the perception and experience with cosmetic brands.

This interview will last approximately 45 minutes, and it will follow a semi-structure method. Meaning, it will start with an initial question and then topics towards the perception and purchase behavior of different cosmetic categories will be developed. There are no right or wrong answers, and you are free to say whatever comes to your mind.

Before we start, I would like to ask you, do you mind if I record this interview? Everything here discussed will remain confidential.

Initial Question:

Last time you bought a cosmetic product, can you tell me which brand did you purchase, and why?

Topics:

Consumption Behavior

The cosmetic market is composed of seven main categories: skincare (face and body), sun care, hair care, deodorants, makeup & color cosmetics, and fragrances.

- What is the most important category for you?
- Main concerns regarding the category
- type of skin (sensitive, oily)
- Which products do you use or have used in the past?
- When thinking about the category, what are the first 2 brands that come to your mind?
- The most recent brand used
- Frequency of usage (every day, every week, every month)
- Occasion for usage (Morning, Night, Both)
- Consumption (consume only vs. purchase and consume)
- Product preferences (e.g. texture, fragrance, etc.)
- Convenience (e.g. easy to use, size format, etc.)
- Main attributes when buying the category (Quality price ratio, durability, natural formula, brand, eco conscious)
- Consumer profile (Brand loyal, switcher, heavy user, light user)

Purchase Behavior

- Frequency of purchase
- Amount of products usually bought at once
- Purpose (For gift, Partner, Self)
- Preferred distribution channels for the category, why?
- Key factors affecting the purchase decision (Quality, Price, Packaging, Loyal, advice)
- Decision making (Knows what to buy, Seeks advice – where?, Chooses at store)
- Influencer – advised by who? (Doctor, Family & friends, Publicity, Pharmacist, Online)
- Impact of advertising in the decision-making

Relationship with pharmacies

- Incentives and obstacles for consumption of the category on pharmacies
- Perception of prices and quality of products sold in pharmacies vs mass market
- Main difference between pharmacies and other distribution channels
- Pharmacies the preferred distribution channel for any occasion? when?

- Type of products bought in the pharmacy (Medical pills, shampoo, uv protection, cream)
- Which brands do you know that sell that category in pharmacies?

Brands Image and Brands Experience

- Preferred brand for the category and why
- Experience with the brand
- Brand loyal/ product loyal

  Vichy
- What comes to your mind when you think about Vichy?
- What feelings you associate with Vichy
- Experience with Vichy

Projective Technique

"If Vichy/ Vichy competitor was a person, what kind of person would it be?"

"what would it look like and how would be its personality?"

"what job would it have?"

Additional question: Could you please describe me your lifestyle? what are your main interests?

Sample characterization

Gender

Age: <25; 25-35

Level of Education: Mandatory; Graduate; Masters

Occupation: Student; Employed; Retired; Student & Employed

Style: Casual; Trendy; Classic

Appendix 15: Sample Characterization

Based on the research done for the contextual background, combined with the information provided by Vichy, it was found that, despite the fact men are growing in the cosmetic market, this segment still only represents 2% of the market composition. Therefore, men still remain significantly less important in terms of potential for the Vichy brand than female consumers, hence the fact they are under-represented in the sample. Accordingly, 25 female and 5 male consumers were selected, for face-to-face interviews. From the 25 women, 21 were aged between 18-25 years old, and 4 between 26-35 years old. Regarding the men sample, 3 had between 18-25 and the other 2 were aged between 26-35 years old. When it comes to their education level, 16 are still studying, while all the others have a master's degree done and are currently working.

Appendix 16 - Interview Guide with Pharmacists

Introduction

First of all, I would like to thank you for agreeing to be part of my work project, from NOVA School of Business and Economics. I am conducting a research about the consumption of cosmetic products in Portugal. The purpose of this research is not only to comprehend the consumers' behavior when buying a cosmetic product in a pharmacy, but also to understand their perception towards different dermocosmetic's categories.

This interview will last approximately 45 minutes, and it will follow a semi-structure method. Meaning, it will start with an initial question and then some topics will be developed. There are no right or wrong answers, and you are free to say whatever comes to your mind.

Before we start, I would like to ask you, do you mind if I record this interview? Everything here discussed will remain confidential.

Initial Question:

Could you please tell me about your experience in selling dermocosmetic products?

Topics:

1. Perception on consumer's behavior

- Consumers' dermocosmetics perception
- Main concerns regarding dermocosmetic categories related to different ages (ex: anti-aging, acne treatment)
- Main attributes when buying a product (Quality price ratio, durability, natural formula, brand, eco conscious)
- Consumer's profile **(**Brand loyal, switcher, heavy user, light user)
- Preferred brands for each category

2. Perception about Purchase behavior

- Relevant variables for decisions (quality, price, quantity**, p**ackaging**,** loyal)
- Decision-making (Knows exactly what to buy, Seeks advice – where?**,** Chooses at store)

3. Focus on pharmacies

- Incentives for consumers consumption in pharmacies (product's quality, credibility on pharmacies, dermatological products, pharmacists advices & service)
- Influencer – advised by: (Doctor, Family & friends, Publicity, Pharmacist, online)
- Main concerns about the type of products bought

Sample characterization

Gender

Age:

Level of Education: Mandatory; Graduate; Masters

Occupation: Student; Employed; Retired; Student & Employed

Style: Casual; Trendy; Classic

Appendix 17 - Online Questionnaire

Thank you for participating in this study. This survey will help a research project from NOVA School of Business and Economics and has the objective to understand the consumption and purchase behavior of consumers in the face care market.

The face care market is composed by different products such as hydration creams, cleansers & make-up removers, exfoliators and serums.

It will take approximately 4 minutes to complete. All of the data gathered will be used for academic purposes and is strictly confidential. There are no right or wrong answers and therefore you should answer honestly.

Thank you

1 - Have you been living in Portugal for the last 5 years?
- yes
- no (END)

2 - Do you purchase or decide about your own cosmetic products?
- yes
- no (END)

3 - Are you less than 35 years old?
- yes
- no (END)

4 - Have you bought or consumed cosmetic products at least once in the last six months?
- yes
- no (END)

5 - See products examples below. Out of the following brands, which ones do you recognize? (Use more than one brand per choice)

Caudalie; Neutrogena; Bioderma; Vichy (If Vichy is not selected → END); Clinique; Uriage; Biotherm; Avéne; Clarins; Eucerin; Dove; Simple; Nívea

6 - Which skin care brands do you purchase regularly?

7 - Where do you usually shop for skin care products?
- Pharmacy
- Para-Pharmacy
- Supermarket
- Specialty Store (ex: Sephora)
- Perfumery

8 - Please select the profile that is most suitable for you:
(1 - Does not apply at all, 7 - Applies exactly)

- First of all, I look at the price. Then I decide what brand to buy;
- Efficacy/ Efficiency is the most important factor. Price is not taken into consideration;
- The brand is the most important factor. Just buy the brands I already know. The price helps me to decide which brand to buy;
- I only buy the products/brands prescribed by my doctor.

9 - How much each applies to you/how important is each point to you
(1 - Not important at all, 7 - Extremely important)

- Keep your skin hydrated;
- Protect your skin from external factors (pollution, UV radiation);
- Clean your skin;
- Anti-acne properties

10 - Please fill the following, according to the amount of research you do before purchasing a product:
(1- Never search for information/ recommendations; 7 - always search for information/recommendations)

- Before purchase a face care product I ...

11 - Please fill the following, according to how much are you sensitive to the price, when it comes to the purchase of face care products:
(1 - The most important factor, 7 - Not a relevant factor)

- When purchasing face care products, Price is ...

12 - From the following categories, which ones do you buy in the Pharmacy/ Para-Pharmacy channel?

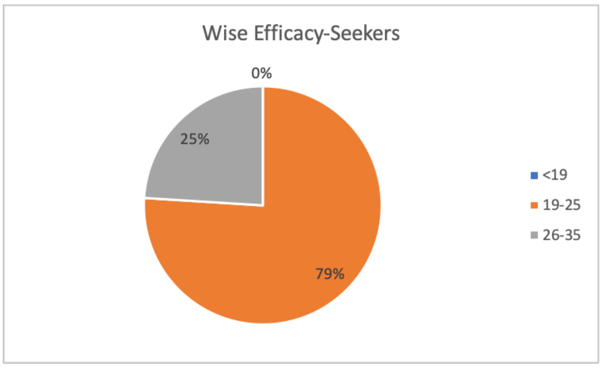
- Facecare;
- Bodycare;
- Suncare;
- Haircare;
- Make-Up;
- Fragrances;
- None

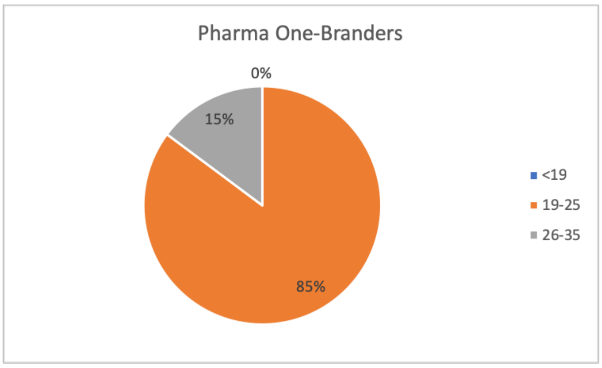
13 - From 1 to 7, how accurately do the selected attributes describe Vichy:
(1 - Not accurately at all, 7 - Extremely accurately)

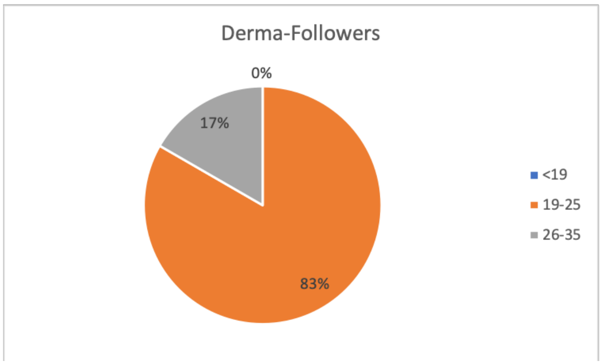
Innovative; Young; Credible; Elderly brand; Natural; Beauty; Reliable; Classic; Modern; Expensive
14 - Gender
15 - Age

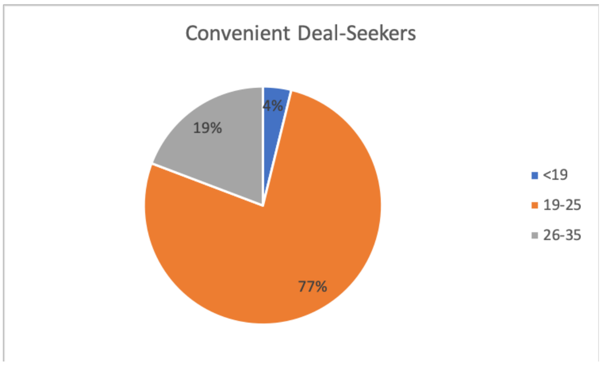
Appendix 18 – Sample Characterization per Segment

- Age

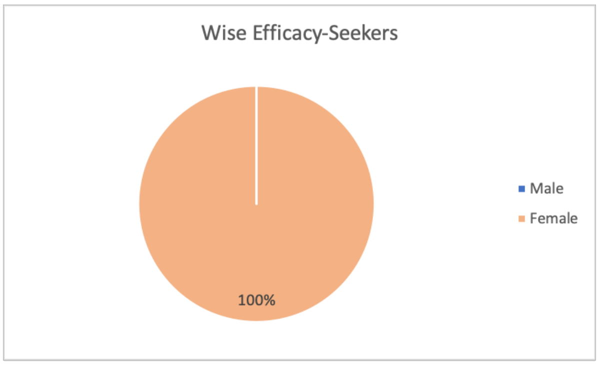


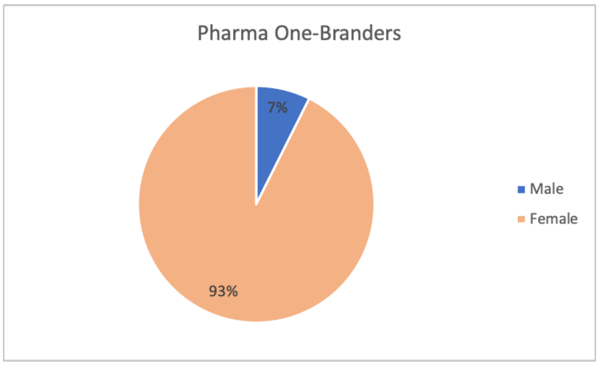


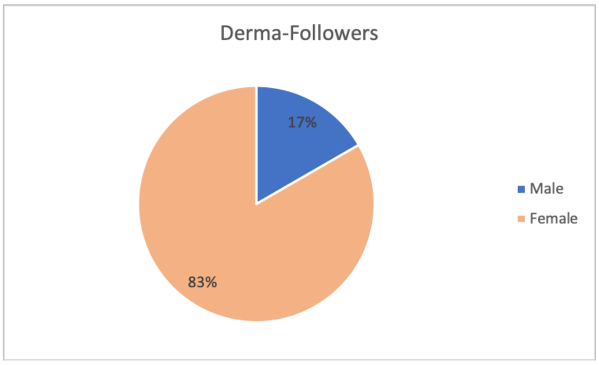


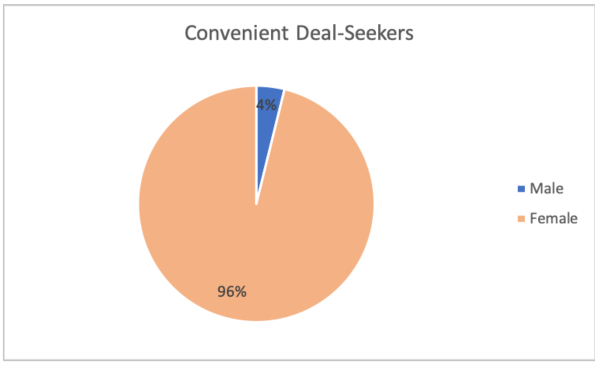


- Gender

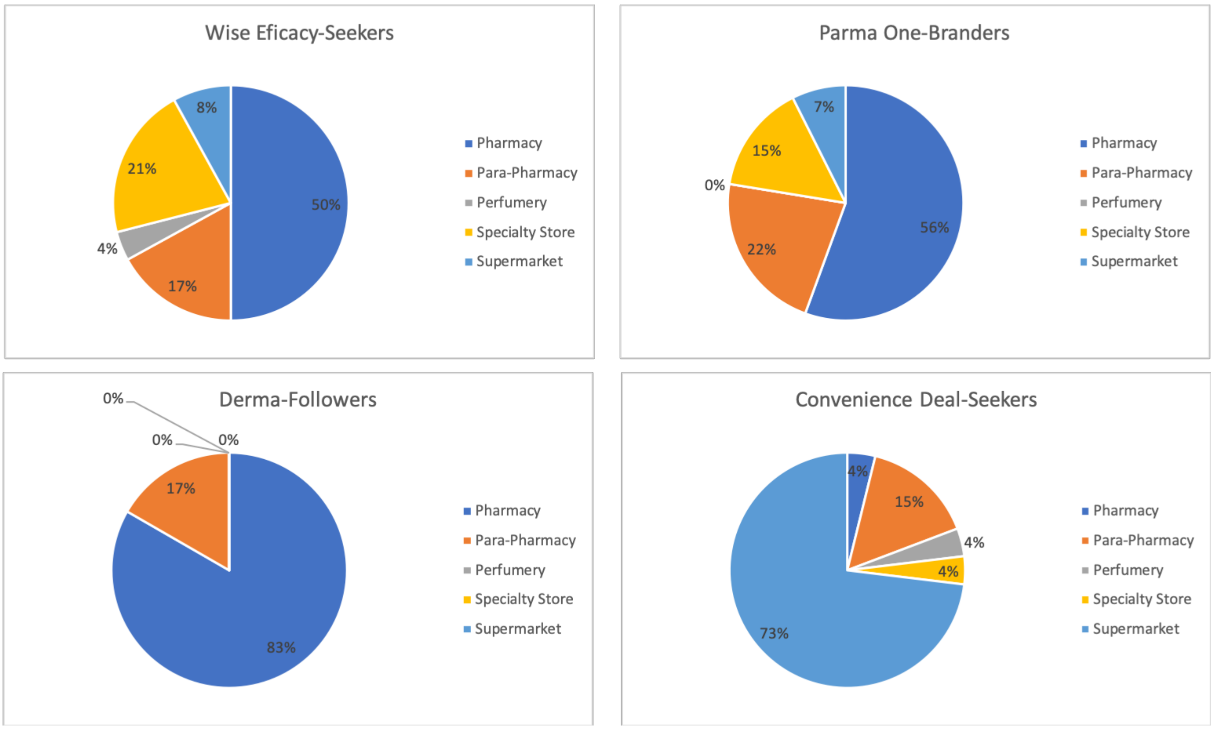




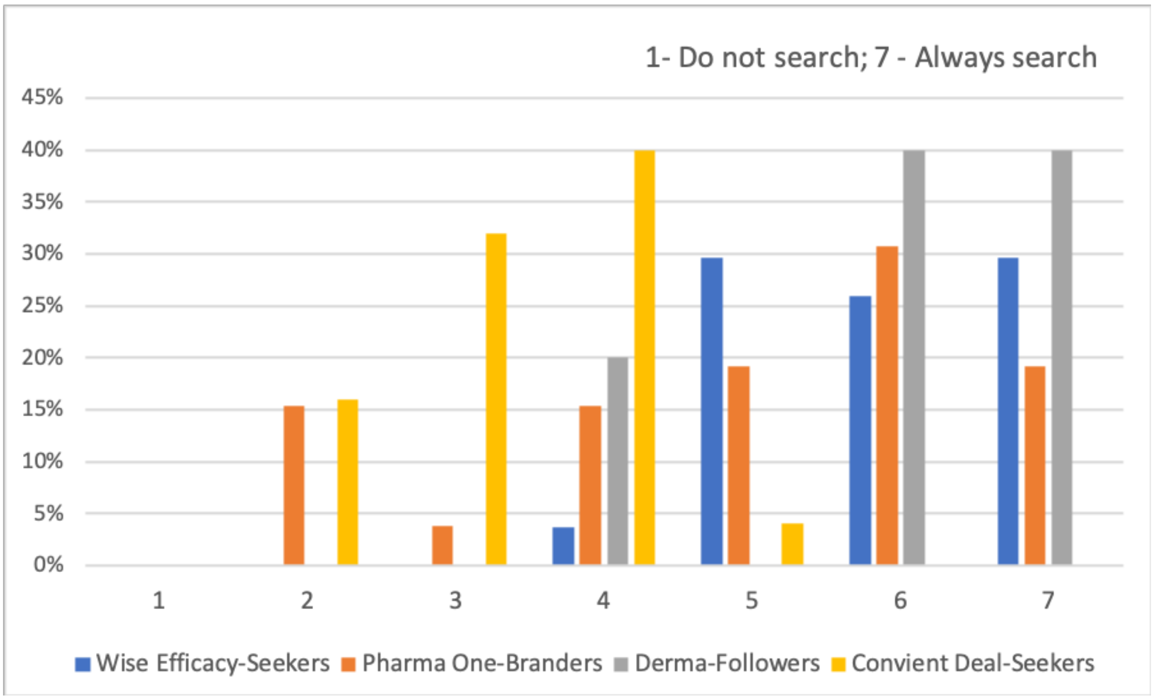




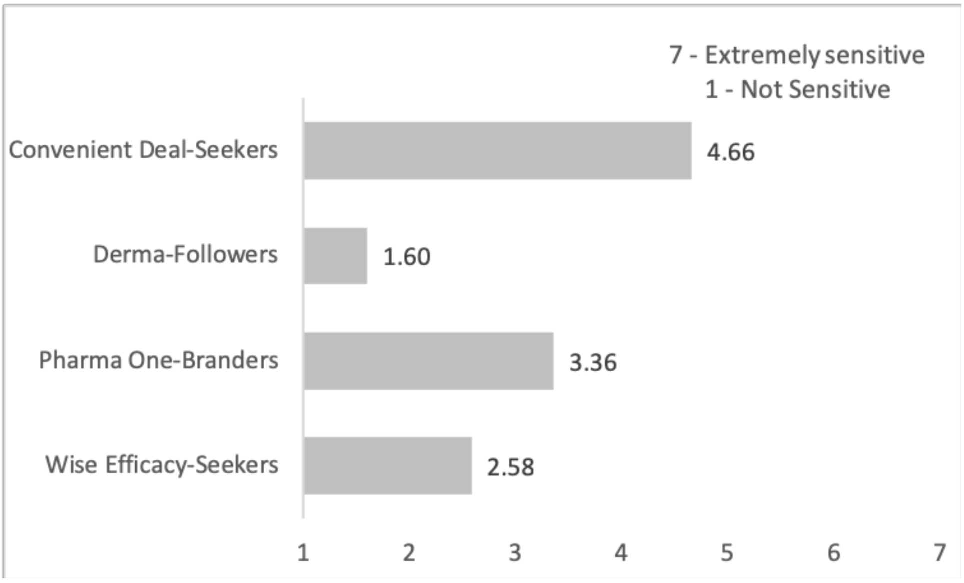
- Preferred distribution channels



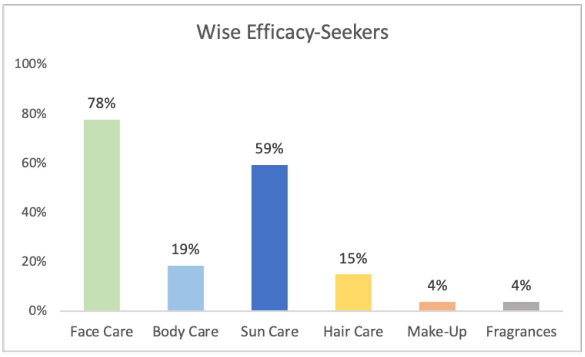
- Amount of Information/ Recommendations' search

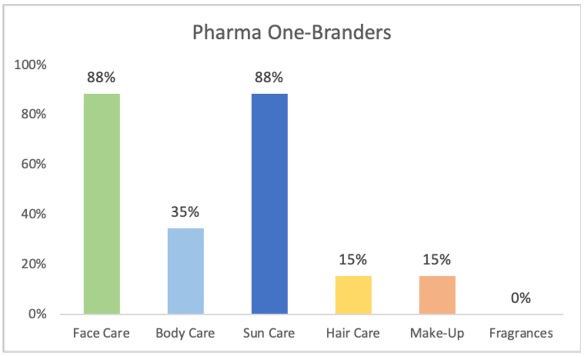


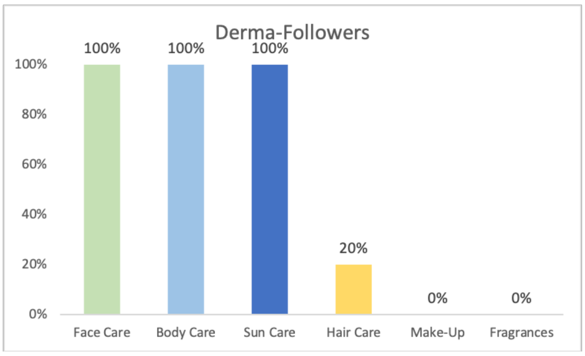
- Average Price Sensitiveness per Segment

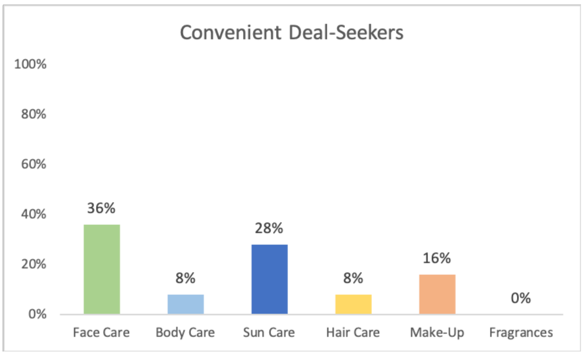


- Pharma Categories used per Segment







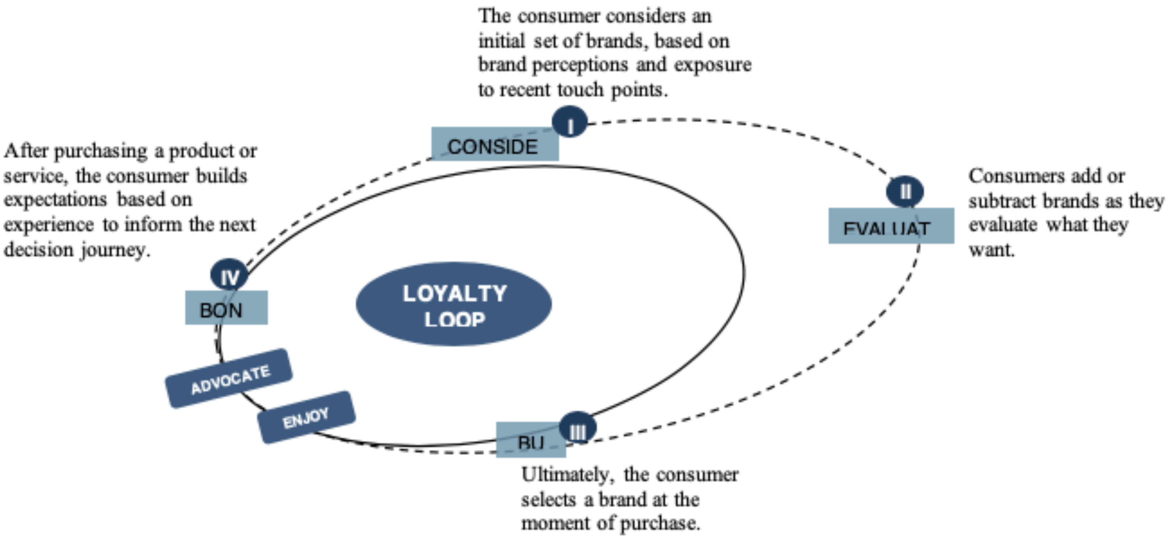


Appendix 19 – Portuguese Cosmetic Market's Segments

Segmentation Criteria:	**Wise Efficacy-Seekers**	**Pharma One-Branders**	**Derma-Followers**	**Convenience Deal-Seekers**
Purchase Driver	Efficacy/ Efficiency	Brand	Doctor's advice	Convenience & Price
Main Concern	Hydrate, Clean, Protect	Hydrate, Clean, Protect	Related to serious skin problems	Hydrate
Research	+			-
Price Sensitive	-	+	- -	+++
Channel				
Brands	Uriage, Avène, Caudalie, Filorga	Uriage, Avène, Bioderma	Uriage, Isdin, La Roche Posay, Bioderma	Nívea, Simple, Garnier
Gender	♀	♀	♂ ♀	♂ ♀

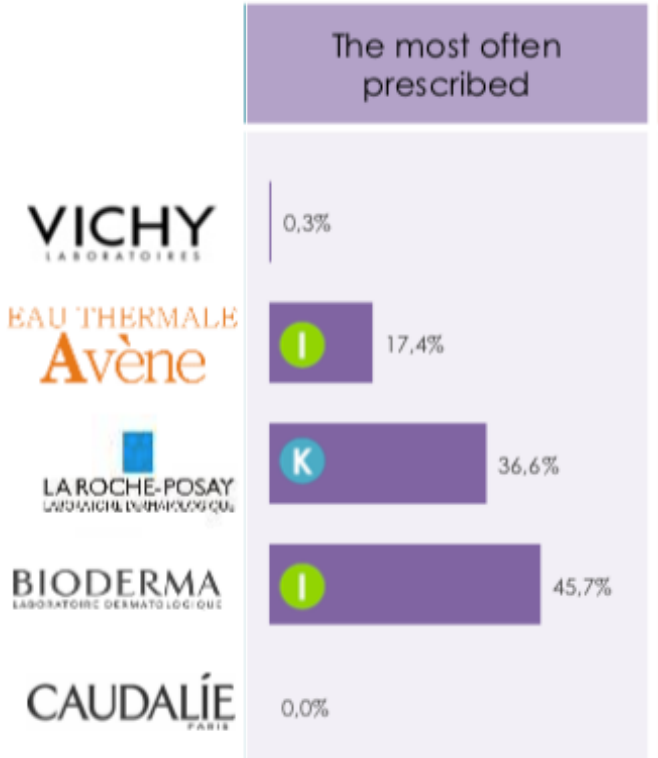
Source: Insights from Primary Research

Appendix 20 – Consumer Decision Journey Model



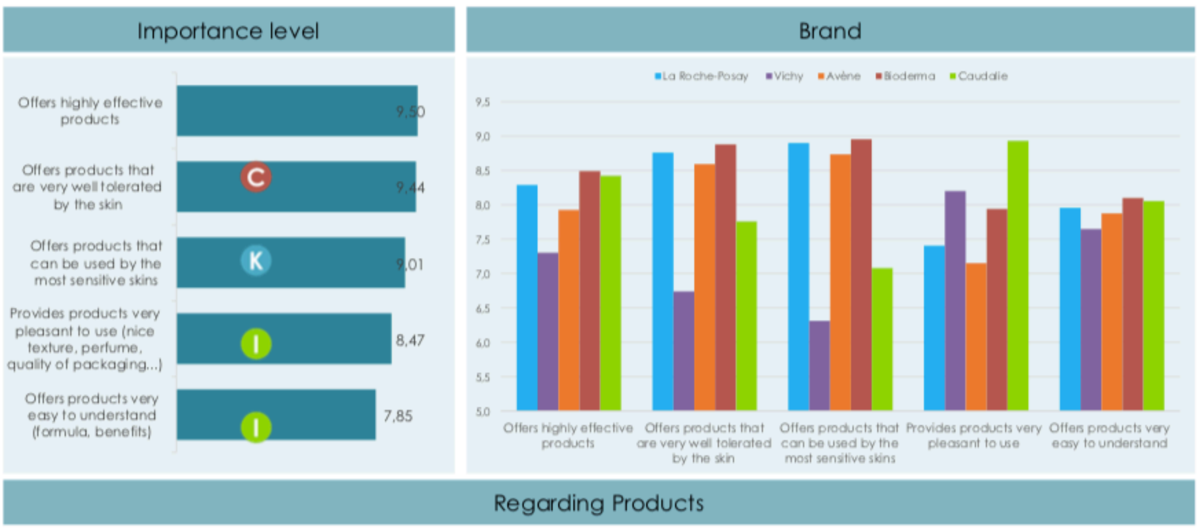
Source: Mckinsey Quarterly (2009)

Appendix 21 – Vichy – One of the Least Often Prescribed Brands



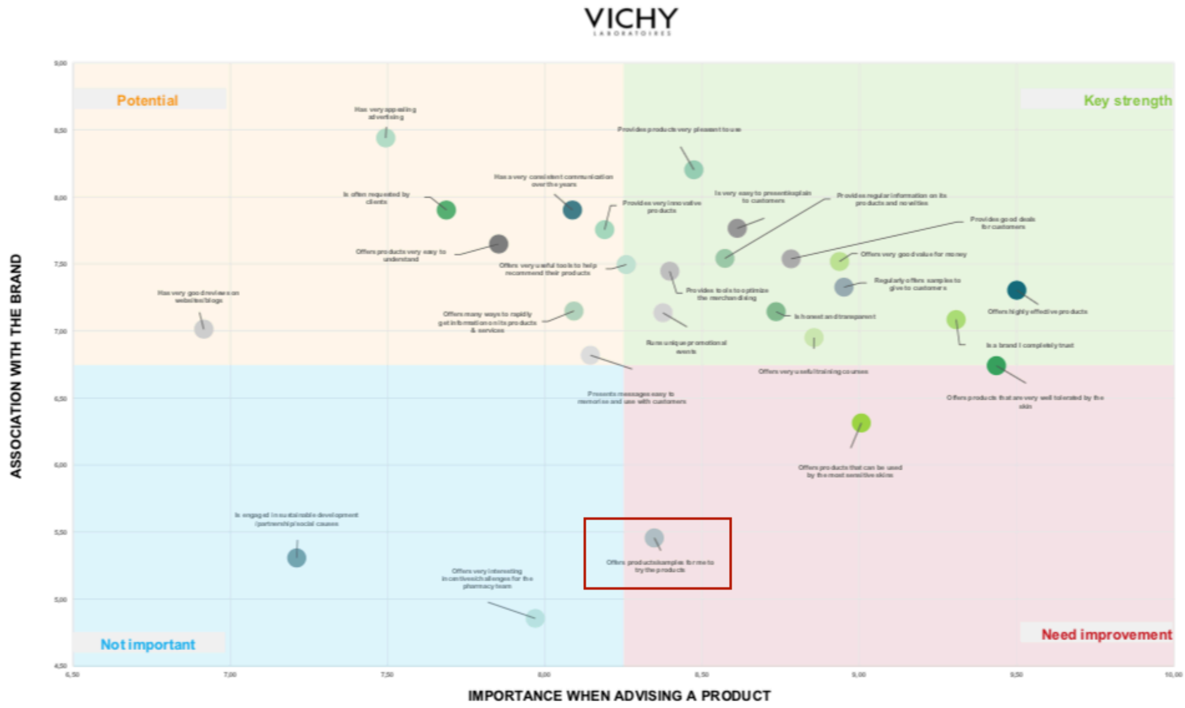
Source: L'Óreal Corporation Presentation (2019)

Appendix 22 – Products' Characteristics Most Valued by Dermo-Advisers



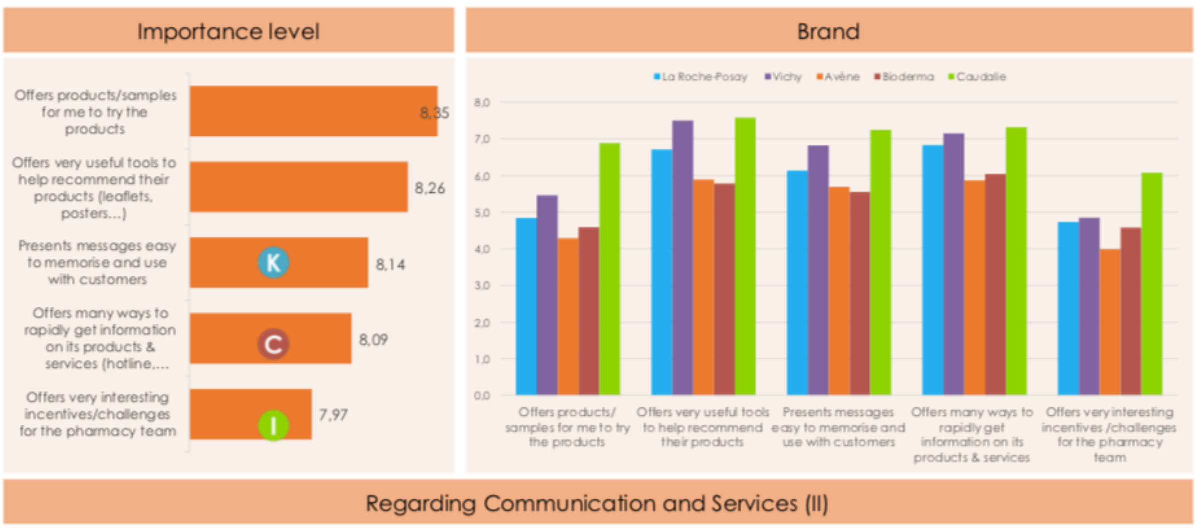
Source: L'Óreal Corporation Presentation (2019)

Appendix 23 –Dermo-Advisors' Vichy's Associations



Source: L'Óreal Corporation Presentation (2019)

Appendix 24 – Communication and Services Most Valued by Dermo-Advisors



Source: L'Óreal Corporation Presentation (2019)

Appendix 25 - Consumers' Reviews on Minéral 89

Inês R, 23 anos, Carnaxide

"Adorei a textura e a hidratação imediata que confere à pele! Além desses aspectos, a pele fica brilhante, radiosa e com um ar saudável extremamente bonito. Recomendo sem dúvida! Um dos vossos melhores produtos ❤️"

Susana R, 22 anos, Paredes- Porto

"Ótimo produto! A sua textura é incrível! Já fiquei rendida e uso-o diariamente"

Catarina M, 24 anos, Barcelos

"Este produto da Vichy é simplesmente fenomenal porque potencia o creme de hidratação que se coloca posteriormente. A pele fica com um aspeto uniforme, hidratado e macio logo após uma semana de utilização. É, sem dúvida, o meu produto favorito da marca, e aquele que a minha pele se adaptou mais rapidamente!"

Source: Vichy's website

Appendix 26 – Solar Protective Water - Recommended Communication Program

- Social Media

- Muppies