

A Work Project, presented as part of the requirements for the Award of a Master's Degree in Management and International Management from the Nova School of Business and Economics.

REACHING GEN Z SKINCARE CONSUMERS IN PORTUGAL: HOW CAN MYCLARINS
EFFECTIVELY COMMUNICATE ON SOCIAL MEDIA

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Abstract

Positioned within the legacy prestige brand Clarins, the myClarins' product range was introduced to meet the needs of Gen Z consumers. The following Work Project intended to gather insights into myClarins' current context and propose recommendations tailored to the Portuguese market. In this sense, five approaches are outlined that delineate research-based directions myClarins can adopt to reach and engage the desired target, Gen Z. Concretely, identity-based, channel alignment, social media, educational, and wellness-based strategies are presented. Additionally, along with a proposed unique selling proposition, the classification of myClarins as a sub-brand rather than a product range is recommended.

Keywords

Skincare, Gen Z, Distribution, Social Media, Education, Wellness, Self-concept.

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1. Introduction

The following Work Project was developed within the Luxury Stream in the Master's in Management at Nova School of Business and Economics in cooperation with Clarins Portugal. Currently, Clarins wishes to leverage its myClarins product range to recruit Generation Z (Gen Z) customers and rebuild a new territory with a digital and community focus (Clarins 2023). Thus, the following thesis aims to answer: *“How can Clarins market a legacy prestige brand to Gen Z customers in Portugal?”*.

In pursuit of this objective, both secondary and primary research were conducted to diagnose myClarins' current situation. The secondary research consisted of desk research as well as a Clarins' Briefing with Patrícia Lourenço (Marketing and Public Relations Manager), Clarins' Office Meeting with the Marketing Department, and materials provided by the brand. Moreover, an analysis was undertaken resulting in insights relative to the global skincare market, Gen Z specificities, and myClarins' context. On the other hand, the primary research consisted of qualitative methods, namely shelf analysis and in-depth exploratory interviews. The main objective of the shelf analysis was to gather information about the products' visibility in myClarins' current distribution channels. Conversely, the in-depth interviews intended to determine participants' consumer behavior, skincare usage, and brand-related behavior.

Following the collection of insights, challenges and opportunities were formulated to construct a comprehensive diagnostic. Subsequently, five distinct approaches emerged to capitalize on opportunities while mitigating the challenges. Moreover, to confirm our diagnosis as well as to uncover insights for individual recommendations, additional primary quantitative research was conducted in the form of a survey.

Lastly, incorporating a holistic understanding of the insights, directions were proposed to address the initial question.

2. Contextual Background

2.1 Market Overview

The global beauty industry encompasses skincare, color cosmetics, fragrance, and hair care categories (BoF and McKinsey & Company 2023). Despite economic turbulence, this industry has proven to be extremely resilient and is expected to grow at a CAGR¹ of 6% until 2027, recording over \$580 billion in retail sales (BoF and McKinsey & Company 2023). This growth is expected to be primarily driven by the skincare category, the largest category comprising 45% of the industry's total market value (BoF and McKinsey & Company 2023). This category is anticipated to grow from \$190 billion in 2022 to \$260 billion by 2027 (BoF and McKinsey & Company 2023).

Throughout the years, e-commerce has consistently been a transformative force in shaping the beauty industry and is forecasted to constitute a quarter of it by 2027 (BoF and McKinsey & Company 2023). Nonetheless, it is expected that in Western Europe, the growth of the industry will be more evenly spread across various sales channels, encompassing specialty and drug stores (BoF and McKinsey & Company 2023).

Lastly, according to BoF and McKinsey & Company (2023), the beauty industry can be divided into six price segments: *mass*, *masstige*, *entry prestige*, *prestige*, *true luxury*, and *ultra-luxury* (Appendix 1). For the sake of simplification, any reference to a premium segment throughout this thesis will encapsulate both the *entry prestige* and *prestige* segments.

2.2 Generation Z

Generation Z, or Gen Z, is currently the second-youngest generation, comprising individuals born between 1996-2010 (BoF and McKinsey & Company 2023). Similarly to previous generations, Gen Z has been shaped by the environment they grew up in. In their instance, they

¹ Compound Annual Growth Rate.

have been impacted by climate change, the digital age, the COVID-19 pandemic, and economic uncertainty. Referred to as the first true digital natives, Gen Z have seamlessly integrated the digital world into nearly every aspect of their lives (McKinsey & Company 2023).

2.2.1 Generation Z Consumer Behavior & Preferences

In comparison to previous generations, Gen Z skincare consumers exhibit higher levels of loyalty, a proclivity for experimentation, and a greater capacity to influence others (BoF and McKinsey & Company 2023). More specifically, this generation has proven to hold significant sway over the purchasing behavior of older cohorts (Baykal 2020), with studies revealing that 90% of parents acknowledge their children's influence on their buying decisions (National Retail Federation 2019). Moreover, they do not seem to be as online-fixated as often assumed, with 41% of respondents in McKinsey's Annual Beauty Consumer Survey reporting physical stores as important channels (roughly the same percentage as older survey respondents) (BoF and McKinsey & Company 2023). As a result, in-store experiences are strongly valued and represent a strong purchasing factor for 85% of respondents. The aforementioned characteristics render it a generation worth investing in, thereby posing a challenge for brands to respond accordingly. In this sense, it is crucial to understand which specific characteristics resonate with and are expected by Gen Z.

Firstly, to Gen Z, transparency and authenticity are indispensable when it comes to the way brands communicate their offer and underlying processes. Unlike millennials, Gen Z is "*demanding proof*" (Be For Innovation 2021), requiring brands to justify their decisions, from price to packaging. This expectation is further demonstrated in the generation's preference for "*unfiltered aesthetics*" (BoF and McKinsey & Company 2023). Similarly, showing skin, freckles, texture, flaws, and imperfections, as opposed to traditionally hyper-polished, airbrushed, and flawless advertising, as well as having products that represent all colors and tones, are also valued

and a preference among this generation (Biondi 2021; Be For Innovation 2021). In fact, 62% of Gen Z says brands over-edit their photos and 70% state that they like it when content from brands is not perfect (Biondi 2021).

In addition, Gen Z deeply values the concept of community-building and thus attaches great importance to a brand's ability to forge an emotional connection, allowing consumers to be part of its narrative (BoF and McKinsey & Company 2023). In other words, it should be as if skincare brands were their friends, friends with whom they can have open conversations about beauty issues such as skin concerns, materialized through UGC², for example (Biondi 2021).

Related to this sense of community, another trend rapidly gaining momentum amongst Gen Z is social commerce³. As a skeptical generation (Cheung, Davis, and Heukaeufer 2017), Gen Z seeks recommendations from individuals they trust (L'Oréal 2023). According to the L'Oréal Annual Report (2022), social commerce provides an enhanced shopping experience centered around discovery, personalization, and trust. As a result, brands are opting for micro-influencers as brand ambassadors due to their ability to evoke a greater sense of transparency and trust. At the moment, the global social commerce industry is estimated at \$492 billion and is expected to grow three times faster than traditional e-commerce (Murdoch et al. 2022).

Moreover, this generation expects brands to advocate and reflect their values (BOF & McKinsey & Company 2023; Be For Innovation 2021). Specifically, values related to mental health, climate change, diversity, inclusivity, realness, relatability, personal expression, identity, and individualism (BOF & McKinsey & Company 2023; Be For Innovation 2021; Stelmaszczyk 2022). As a repercussion, there is an emerging trend towards gender-neutral beauty products and

² User-Generated Content.

³ A form of e-commerce where an individual or a brand interacts with a consumer on social media to generate a sale (L'Oréal 2023).

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working with male, transgender, or non-binary models for traditionally female-orientated product ranges (BoF and McKinsey & Company 2023).

Another factor that plays a crucial role in Gen Z's purchasing behavior is the concept of value for money. While price undeniably holds significance, the prioritization leans towards product efficacy (Be For Innovation 2021). According to McKinsey's Annual Beauty Consumer Survey (2023), 50% of Gen Z respondents are willing to pay a premium for products if they offer superior quality. Moreover, to this generation, a higher price does not necessarily imply higher quality, as it needs to be justified in terms of value creation (BoF and McKinsey & Company 2023).

Furthermore, sustainability is a pertinent aspect of the skincare market for it can act as a value driver, substantiating a price point. BOF and McKinsey & Company (2023) report that 46% of Gen Z respondents are willing to pay a premium if they consider a brand sustainable. Additionally, according to Lai (2021), 27% of Gen Z participants have stated that they have deliberately bought skincare or cosmetics products because of the brand's sustainability initiatives. At the moment, the most appreciated characteristics include being vegan, cruelty-free, eco-friendly, having sustainable packaging, and the social impact (Lai 2021; Be For Innovation 2021; Biondi 2021).

Drawing on the value for money and sustainability concerns, a trend of *skiminalism* has emerged (Biondi 2021; Helen + Gertrude n.d.). Put differently, this pertains to a simplistic approach to skincare – “*creating the essential, nothing more nothing less*” (Biondi 2021) – by using multi-purpose products or through the reduction of the number of steps in a skincare routine.

Additionally, unlike older cohorts, this generation invests significant time in extensive research regarding product benefits and alternatives (BoF and McKinsey & Company 2023). According to BoF and McKinsey & Company (2023), approximately 50% of Gen Z consumers conduct research on product ingredients and benefits prior to purchase. Social media plays a large role in this educational aspect, namely TikTok (Biondi 2021; Be For Innovation 2021), and has thus pushed

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brands to play the role of educators by providing further information (Biondi 2021). This increasing understanding among consumers regarding their skin needs (Kyra 2022) has ultimately fueled the democratization of the beauty industry (Be For Innovation 2021).

Another current Gen Z skincare trend is *prejuvenation*, which has been referred to as a “*preventive treatment for aging*” (Haykal, Nahai, and Cartier 2023). It pertains to a shift from correction and reversal treatments for millennials to a focus on preventive measures for Gen Z (Haykal, Nahai, and Cartier 2023). Kyra (2022) anticipated that the use of anti-aging products would start at an earlier stage than ever before, emerging as the beauty trend of 2023. Consistently, Kennedy (2023) has noted Gen Z is buying into anti-aging products and procedures “*more than ever and earlier than ever*”.

Lastly, across all generations, there has been an expansion in the understanding of beauty, moving toward a more holistic perception surrounding *wellness* (BoF and McKinsey & Company 2023). This expansion has influenced skincare, aligning it with the notion of self-care (Steven 2021). According to Kyra’s 2022 report, 40% of Gen Z consumers express a connection between their skincare journey and their overall wellness and personal well-being. Moreover, the increased emphasis on physical well-being as opposed to appearances could be the reason behind the prioritization of natural ingredients in skincare products (Helen + Gertrude, n.d.). Likewise, it was found that Gen Z’s biggest consideration when shopping for beauty products was “*natural, non-toxic ingredients*” (Helen + Gertrude, n.d.).

2.3 Clarins

Founded in 1954, the French family-owned company Groupe Clarins is one of the prestige skincare leaders in Europe. The group is present in over 150 countries and consists of two brands: Clarins and myBlend. The Clarins brand is globally recognized for its commitment to continuous innovation, namely through the incorporation of plant extracts within its formulas, and is composed of three main categories: skincare, makeup, and spa products. Within these categories, the brand caters its formulas to different skin types and life stages, aiming to address the varying skin concerns. Nonetheless, Clarins' products tend to be oriented toward mature skin concerns, with anti-aging products representing 40% of sales (Clarins 2023). As per Netsonda (2023), only 18% of Clarins' consumers fall within the 18 to 29 age range, whilst more than 50% are aged above 40.

2.3.1 myClarins Product Range

Within the skincare category, Clarins introduced the myClarins gender-neutral skincare range in 2019 to meet Gen Z's skincare needs and to empower younger consumers through skincare education (Clarins 2023). The range is targeted to individuals between the ages of 16-29 who despite having fast-paced lifestyles, care about their well-being (Clarins 2023). As such, myClarins is characterized by its natural, vegan, and simplistic approach to skincare.

Given Gen Z's different skin concerns, its products are fruit and plant-based to energize and detox the skin. In addition to this, the products also incorporate ingredients with hydrating and antioxidant properties, such as *glycerine*, and *moringa oleifera* seed extracts. Thus, despite being a product range and relying on Clarins' expertise, myClarins has a relatively distinct identity and positioning from that of Clarins. This is evidenced in Figure 1, with the distinct characteristics of Clarins and myClarins being indicated in red and blue, respectively.

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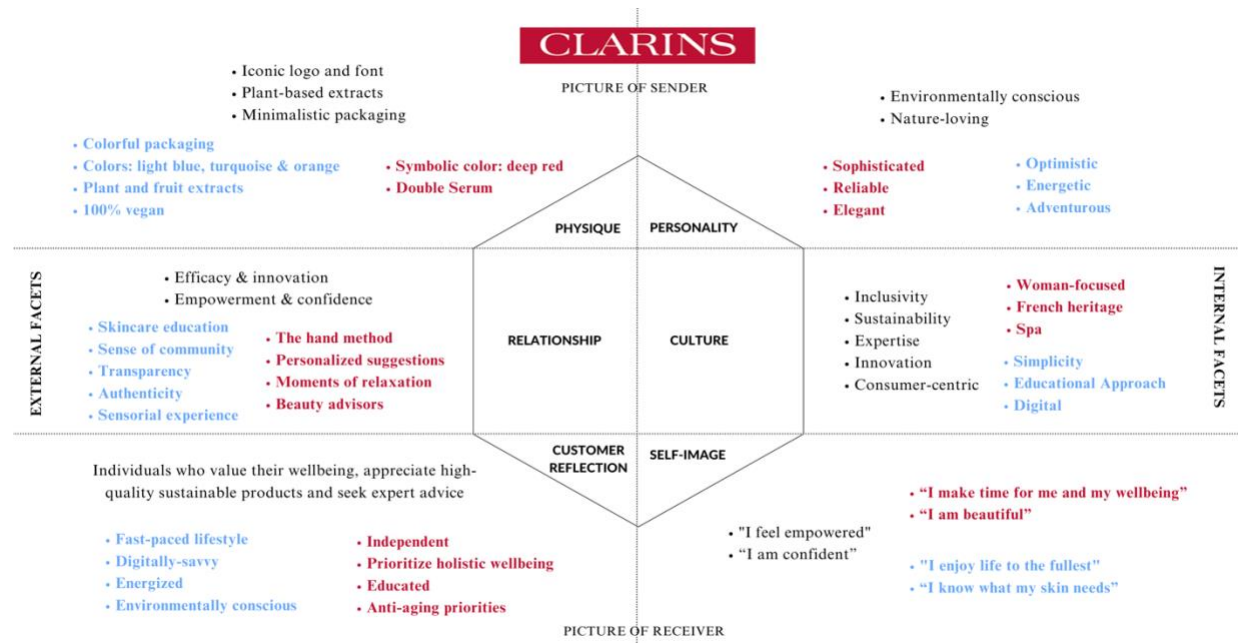


Figure 1 – Clarins' Brand Identity Prism (based on Kapferer 2012)

Source: Work Project Authors

Regarding price, myClarins is positioned at a lower price point relative to Clarins, with prices ranging from €20.50 to €34.50 (Clarins 2023). Based on McKinsey's (2023) beauty price segments (Appendix 1), myClarins is positioned within the *masstige*⁴ segment whereas Clarins falls within the *entry prestige* and the *prestige* segments.

Since its inception, myClarins has experienced a few strategic changes, including the shift from a food-oriented promotion to a benefits-oriented promotion in 2022. More recently, in September 2023, the myClarins range underwent a strategic relaunch with a new storytelling concept, offer, approach, and ecosystem (Appendix 2). In addition, the packaging was modified, and certain SKUs⁵ were discontinued whilst others, such as the PURE-RESET serum, were introduced (Appendix 3). It is also important to note that the product range experienced a price increase, as it was previously priced between €17.00 and €29.00 (Clarins 2023).

⁴ Combining mass and prestige, the term has been described as "*prestige for the masses*" (e.g., Silverstein and Fiske 2003; Truong, McColl, and Kitchen 2009).

⁵ Stock Keeping Units.

2.4 myClarins in Portugal

2.4.1 The Portuguese Skincare Market

Despite facing challenges in 2020 amid the COVID-19 pandemic, the Portuguese skincare category has returned to growth, surpassing 2019 levels (€370 million). At the moment, the market has a retail value of €407 million, with facial skincare representing the largest category – 69.7% of sales (Euromonitor 2023). Concerning offline retail channels (Appendix 4), currently, the main contributors in terms of retail value are perfumeries (36.3%), pharmacies (21.0%), and supermarkets (15.2%). Nonetheless, it is worth noting that the parapharmacy channel is becoming the fastest-growing channel, with Wells being the main driver (IQVIA 2022, as cited in Pereira Teixeira 2022). In contrast, e-commerce constitutes a mere 3.5% of retail value (Euromonitor 2023). Furthermore, within the skincare category, both the mass and premium segments exhibited growth in 2022 (Euromonitor 2023).

Regarding mass skincare products, the key growth contributor was private labels, accounting for 7.9% of skincare sales (Euromonitor 2023). This is primarily attributed to the population's relatively low purchasing power (Eurostat 2022) and intensified by the high inflation rates ultimately compelling skincare consumers to switch from premium to mass products (Euromonitor 2023). Additionally, the rising interest of younger generations in skincare further fuels this trend. As aforementioned, skincare has been increasingly attracting younger audiences (Euromonitor 2023; BoF and McKinsey & Company 2023) and consumers in Portugal are no exception to this. Their purchasing power is fairly lower compared to older generations, thus prompting a preference for buying skincare in supermarkets (Euromonitor 2023). Consequently, grocery retailers have taken this opportunity to invest in their own private label ranges (Euromonitor 2023). Likewise, perfumeries such as Sephora and Douglas have created private labels and allocated greater shelf

space to these products. Lastly, Mercadona's rapid expansion has also contributed to the significant sales of private labels (Euromonitor 2023).

Despite inflation, the allure of premium beauty and personal care as an affordable indulgence gained prominence, aligning with the *lipstick effect*⁶ phenomenon (Euromonitor 2023; Lopes 2021). Nonetheless, its expansion can be mainly credited to its increasing accessibility as well as the growing interest in premium pharmaceutical products (Euromonitor 2023). The emergence of discounter perfumeries, such as Primor, has facilitated consumers' access to a variety of products ranging from premium to mass cosmetics. In addition to this physical availability, these discounters frequently host significant price promotions, which is particularly relevant in a country that heavily relies on promotions (Alves 2021). Besides promoting mass products, these campaigns also contribute to the further accessibility of premium products. Lastly, the overall increase in consumers' skincare knowledge has heightened the interest in premium derma-cosmetic products (Euromonitor 2023). Nonetheless, it is crucial to note the implications these discounters will have on retailers, that will have to adapt their prices to remain competitive.

2.4.2 Competitors

In addition to the competitors outlined by the Clarins Marketing Team (Clarins 2023), numerous other skincare brands were identified as competitors based on the following criteria: price, natural composition, being vegan, target age, skin type, key ingredients, and positioning (Appendix 5). Within this analysis, *mass*, *masstige*, and *entry prestige* brands were considered, according to BoF and McKinsey & Company (2023) price segments (Appendix 1). The respective market landscape can be seen in a positioning map (Figure 2) based on the predominant distinguishing factors, i.e., product pricing and their natural composition.

⁶ The concept that sales of affordable luxuries rise in economic downturns (Lopes 2021).

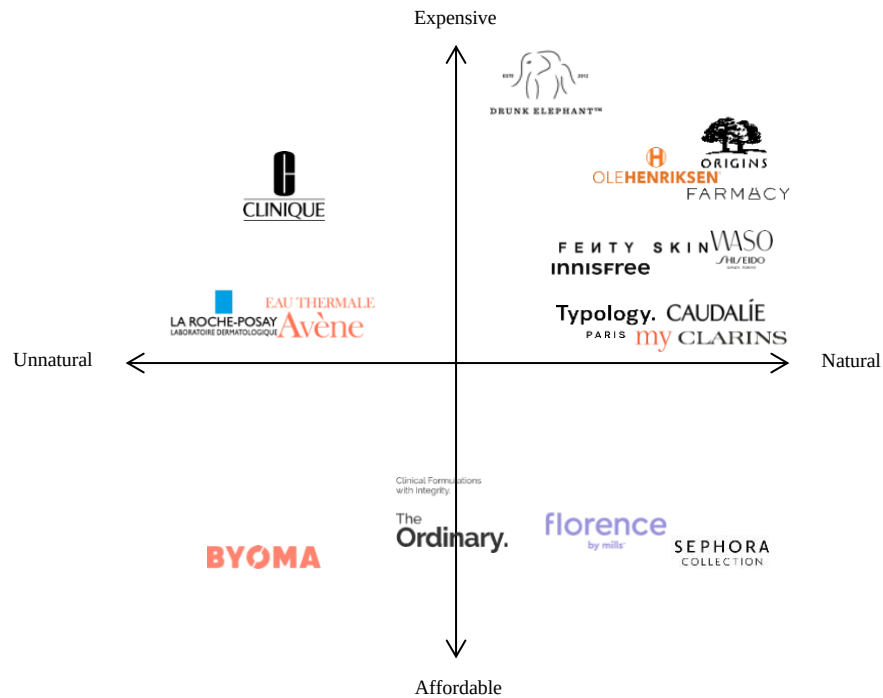


Figure 2 – Positioning Map for Skincare Brands According to Price Range and Composition

Source: Desk Research

Hence, as exhibited by Figure 2, myClarins' direct competitors are Typology and Caudalie due to their similar price range and natural composition. The price ranges being €12.50 to €37.90 and €10.90 to €43.50, respectively, and the natural compositions between 90% and 100%.

Even though Waso, Innisfree, Fenty Skin, Farmacy, Ole Henriksen, and Origins are almost all natural, its products are priced higher when compared to myClarins. The Ordinary, Sephora Collection, Florence by Mills, and Byoma are the brands with the most accessible products, with the fourth being less natural than the others. La Roche-Posay and Avène also possess a comparable positioning with similar prices but with less natural products, as they are science-based brands. Lastly, Drunk Elephant is distinguished by being the most expensive brand, with an average price of €59.52 (the most expensive product being €92.99), and its composition is based on biocompatible skincare ingredients.

2.4.3 Distribution Channels

As a product range within Clarins, myClarins shares the same offline and online distribution channels as Clarins, except for Sephora which is exclusive to the latter (Clarins 2023). The offline channels encompass department stores and perfumeries, while the online channel pertains to the *clarins.pt* website, featuring an e-commerce component. Notably, offline channels account for 98% of total sales, while its e-commerce platform contributes 2% to sales (Clarins 2023).

With this said, the official retailers include Perfumes & Companhia, Douglas, El Corte Inglés, and other independent perfumeries (Appendix 6). Upon its launch in 2019, myClarins was exclusively available at Sephora, however, at the moment Sephora only sells the range online. Moreover, due to future alterations in Sephora's retail strategy, the retailer intends to cease the sale of myClarins (Clarins 2023). Apart from the aforementioned official retailers, due to foreign distributors, myClarins is also available through other channels such as Skin.pt, Wells, Primor, and Loja do Shampoo (Clarins 2023).

In the past, from February to September 2022, myClarins had an additional corner in the El Corte Inglés in Lisbon, located on the third floor alongside the *Youth Fashion* section. As a result of this experiment, on average 4 units of myClarins were sold per day, corresponding to 60% of myClarins sales in El Corte Inglés during this period (Clarins 2023).

With the relaunch, myClarins aims to shift toward a phygital strategy, focusing on accelerating E-DTC⁷ and being tactical about their partnerships with retailers, through areas with significant youth presence (Clarins 2023).

⁷ E-commerce Direct-to-Consumer.

2.4.4 Communication

2.4.4.1 Social Media Channels

Regarding social media, neither Clarins nor myClarins have a Portuguese TikTok account. Clarins Headquarters in France maintains an international account, restricting the creation of local accounts for other countries. In fact, Clarins Portugal has dark posts published on the international account, that is, targeted content that is not visible to the general public but is tailored for the Portuguese market (Clarins 2023).

In addition to this, Clarins has a Portuguese Instagram account. Throughout its Instagram feed, myClarins' presence can be seen mostly through *posts* and *stories* of influencers or UGC creators. myClarins' related content usually consists of product hauls and informative videos regarding products' ingredients, affirmed benefits and results, and routine and application of these products. Nevertheless, this content often features creators that do not represent the target's age, nor does it address the previously identified Gen Z preferences, such as wellness or prejuvenation. In addition, some of these posts simultaneously showcase myClarins and Clarins products. Finally, the majority of myClarins' posts are usually videos recycled and adapted from Clarins' international account.

Concerning influencer marketing, myClarins is currently partnering with different creators on both platforms. In the case of TikTok, myClarins has already partnered with Portuguese influencers and UGC creators that share myClarins gifted product hauls in their personal accounts. On Instagram, Clarins has a long-term partnership with a Gen Z Portuguese influencer – Sara Vicário – as a digital ambassador. However, the influencer promotes both Clarins' and myClarins' products, depending on the brands' new launches and initiatives. Additionally, during November 2023, twenty-five press kits were distributed to influencers featuring the new packaging and presenting the new and rebranded concept (Clarins 2023).

2.4.4.2 Out-Of-Home Channels

Along with social media, in May of 2023, the brand launched 225 Out-Of-Home (OOH) placements across fifteen universities. Moreover, there have been and will continue to be several initiatives in collaboration with universities, such as welcome day sampling, beauty classes, and promotion on student unions' social media (Clarins 2023). For example, product samples were distributed during May and October 2023 in selected universities. Furthermore, aiming to reach Gen Z, a Spotify advertisement was implemented (Clarins 2023).

Lastly, a two-week MegaHits radio spot took place in October 2023, where radio hosts communicated myClarins' relaunch as well as other skincare-related themes (Clarins 2023).

3. Qualitative Research

3.1 Shelf-Analysis

3.1.1 Methodology

To assess the visibility of myClarins's products in its official distribution channels, in-store shelf analyses were conducted in the brand's corner in El Corte Inglés (Lisbon) as well as in the main perfumeries Clarins directly distributes to (Perfumes & Companhia and Douglas) (Netsonda 2023). The respective shelf analyses of the perfumeries were conducted in major shopping malls (Colombo, Cascais Shopping, and UBBO) in Lisbon.

3.1.2 Insights

In the Douglas stores, it was observed that myClarins consistently occupied the lowest shelf and was often positioned adjacent to the Clinique brand. Particularly, in Colombo and Cascais Shopping, inaccuracies in shelf labeling were identified, leading to misplacement of myClarins in the shelves (Appendix 7). In Colombo, for instance, it was positioned in the *body* shelf, meant for body care products.

Considering Perfumes & Companhia, myClarins was always positioned in a different section separated from Clarins, demonstrating superior visibility compared to the locations in other perfumeries. For example, in Colombo, it was present in the distinct section *Young & Beauty* targeting the Gen Z demographic (Appendix 8).

In the case of Clarins' store in El Corte Inglés, despite having a designated myClarins' display area (Appendix 9), it was positioned behind a wall and consequently could not be seen directly by consumers and prospects passing by.

Overall, a discernible pattern of limited visibility was noted across all locations, rendering myClarins' products challenging to locate within the retail space.

3.2 In-Depth Interviews

3.2.1 Methodology

To acquire a qualitative understanding of underlying factors and motivations driving skincare consumption among Gen Z skincare consumers in Portugal, in-depth structured interviews were conducted (Appendix 11). The interviews took place in-person or online, through Microsoft Teams, Zoom, or FaceTime. Moreover, the participants were gathered through convenience sampling, derived from the project authors' networks. Prior to every interview, a pre-recruitment questionnaire (Appendix 10) was carried out to ensure the interviewees represented a suitable sample for the research objective. The target was individuals (1) between the ages of 16–29, (2) that have been living in Portugal for at least one year, (3) interested in skincare, (4) who have a skincare routine, and (5) that would be willing to pay up to €29 for a skincare product (myClarins' price at the time, September 2023). The interview aimed to address the following main topics:

- **Section 1) Consumer Behavior:** intended to acquire insights into the different Consumer Decision Journey⁸ steps;
- **Section 2) Skincare Usage:** explored respondents' skincare journey and evolution;
- **Section 3) Skincare Brands:** had the objective to (1) discover the sample's favorite skincare brands, (2) analyze brand awareness, and (3) understand skincare consumers' perceptions of myClarins, Clarins, and its competitors. This section included a projective technique in which respondents were asked *"If myClarins, Clarins, and (favorite brand mentioned) was a person, what kind of person would they be?"*. This technique had the goal of uncovering respondents' unconscious brand personality perceptions⁹.

With the respondents' consent, the interviews were recorded to later be transcribed. The qualitative content was then sorted into an analysis grid on Microsoft Excel to facilitate the identification of response patterns as well as comparisons between respondents. Lastly, the analysis was concluded by extracting preliminary insights for the current myClarins diagnostic.

3.2.1.1 Sample Characterization

A total of 50 interviews were conducted, the demographic data may be seen below in Figure 3 and Table 1.

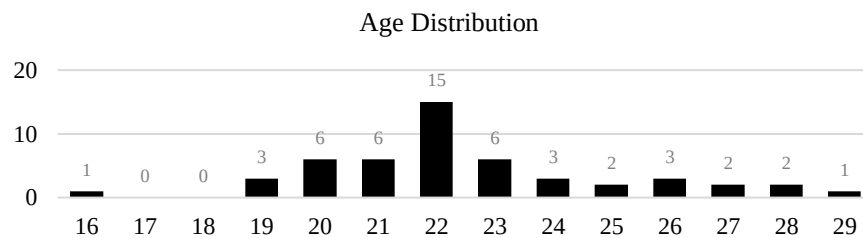


Figure 3 – Qualitative Research: Age Distribution

⁸ Based on McKinsey Quarterly (Court et al. 2009).

⁹ Brand personality can be defined as *"the set of human characteristics associated with a brand"* (Aaker 1997). As such, brand personality shall be comprehended within the brand image concept, being one type of association consumers have with a brand that gives meaning to it.

Table 1 – Qualitative Research: Sample Characterization

Demographic Data		Frequency	%
Gender	Female	45	90%
	Male	5	10%
Employment Status	Student	30	60%
	Active Employee	10	20%
	Student worker	10	20%
	Unemployed	0	0%
Highest Level of Education	Middle School	1	2%
	High School	14	28%
	Undergraduate	30	60%
	Post-Grad or Masters	5	10%
Nationality	Portuguese	46	92%
	German	2	4%
	Austrian	1	2%
	Polish	1	2%
Place of Residency (Region)	Açores	0	0%
	Alentejo	7	14%
	Algarve	0	0%
	Center of Portugal	11	22%
	Lisbon	28	56%
	Madeira	0	0%
	Porto and North	4	8%

3.2.2 Insights

3.2.2.1 Category Insights

a) Consumer Decision Journey

Upon the analysis of the interviews, a general Consumer Decision Journey (CDJ) pertaining to skincare consumers in Portugal was drawn.

First, skincare consumers are most commonly **triggered (0)** by existing skin concerns, namely acne, breakouts, and dry skin, as well as by recommendations and/or feedback from their peers. Then, once the need arises, consumers will **consider and form an initial set of brands (1)** based on peers' recommendations or feedback. Among the considered brands, consumers will **actively evaluate (2)** and ultimately choose a brand due to having aesthetic packaging, price, quality, peers' feedback, being specific for their skin concerns or needs, and sustainability practices and efforts.

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The decided brand's product will then be **purchased (3)** by one of the two identified targets: the immediate target or the shopper target. The immediate target refers to the end consumer, Gen Z, whereas the shopper target pertains to a third party who purchases it for the end consumer (e.g., mothers). Lastly, the **post-purchase experience (4)** determines whether or not a bond with the brand is formed. If a bond is established, consumers enter the loyalty loop where they tend to repurchase the same products without revisiting the initial stages of the CDJ.

Moreover, three main segments were identified according to their level of skincare knowledge: Newbies, Curious, and Skintellectuals. It is important to note that skincare knowledge refers to their ability to understand their skin and address their skin concerns with the correct products and ingredients. With this said, along with the behavior identified above, each segment's CDJ in terms of the specificities in each step is outlined below.

Segment 1) Newbies (11/50): Are not educated on the ingredients, benefits, or science and thus are not knowledgeable about their skin and its particular needs.

Table 2 – Newbies' Consumer Decision Journey

Trigger (0)	(No segment specificities were found in this stage)
Initial-consideration set (1)	Expert's opinions are often considered when deciding on an initial set of brands.
Active evaluation (2)	The fact that the brand or respective product provides a hydration function will influence the final choice, as well as its efficacy, not leaving the skin oily and knowing and/or trusting the brand.
Moment of purchase (3)	Most do not purchase their products themselves but through their mothers. Supermarkets (in-store) are the main location.
Postpurchase experience (4)	These consumers may likely bond with the brand or the brand's products, but peers will always play an influencing role in trying new brands or products.

Segment 2) Curious (24/50): Do not fully understand their skin and therefore do not know what products and ingredients work best for them yet, finding themselves in the “trial-and-error phase”.

Table 3 – Curious’ Consumer Decision Journey

Trigger (0)	Recommendations/feedback through social media, and medical advice, together with a desire to try new products, will add to the trigger influences for this segment.
Initial-consideration set (1)	The main source of influence at this stage is social media, either through TikTok, Instagram, or YouTube.
Active evaluation (2)	Here, product’s ingredients, the fact that the brand or respective product provides information and education, providing a hydration function, and having appealing communication will be decisive factors.
Moment of purchase (3)	Most will buy their own products, being also price-driven and the segment with the highest propensity to buy online.
Postpurchase experience (4)	They may likely bond with the brand or brand’s products but will always like to experiment with new ones.

Segment 3) Skintellectuals (15/50): Are educated on the ingredients, benefits, and science of skincare products and hence are knowledgeable about their skin and its particular needs.

Table 4 – Skintellectuals’ Consumer Decision Journey

Trigger (0)	Recommendations/feedback online, and natural depletion will additionally trigger these consumers.
Initial-consideration set (1)	In general, more than one source of influence is always considered. Online sources of information and experts’ advice will influence the decision.
Active evaluation (2)	Evaluation will take place based on the product’s ingredients, the brand’s transparency, and having some scientific and research backup.
Moment of purchase (3)	Most purchase the products themselves, mainly in pharmacies (in-store). The main decision driver seems to be price, being also a price-driven segment, as they tend to search online for the best offers.
Postpurchase experience (4)	They will form a strong bond with the brand or the brand’s products, sharing their experiences with others and creating memories around it.

b) Social Media Communication

Firstly, it was established that social media plays a vital role in influencing the decision-making process of the target, more precisely through TikTok and Instagram. Furthermore, the majority of the interviewees expressed a preference for informative videos explaining the product's application, benefits, results, and ingredients: *"I enjoy seeing reviews, tutorials, also routines on real people using the products, mostly that."* (Female, 23, Curious). Moreover, unpaid reviews, skincare routines, and GRWMs¹⁰ are also content that this generation appreciates: *"I like to see tutorials, routines, tips on how to use products, and real before-and-after photos or videos of people who have used products"* (Female, 20, Curious).

In addition, the interviews revealed that influencers play a crucial role in brand perception and purchase decisions: *"I also like to buy a brand that I associate having an influencer or a celebrity. For example, I associate Zendaya with Lancôme"* (Female, 22, Curious).

c) Educational Content

It became evident that there is a significant demand for educational skincare content. Participants expressed an interest in brands offering more than the basic information, seeking comprehensive details about product specifics and skincare in general. In fact, it seemed to encompass a deep dive into the purpose and composition of products, the vital role of each ingredient in skin health, and their appropriateness for different skin types: *"I think it's good because they are presenting the product and they also explain what the product does, and I like when they have scientific information because it is more reliable"* (Female, 20, Skintellectual).

¹⁰ Get Ready With Me, a popular social media content that showcases the process of getting ready.

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Interviewees also emphasized the importance of advice on skincare routines, a clear understanding of various skin concerns, and the effective use of products to address these problems. Moreover, interviewees indicated a preference for accessing educational skincare content both online and offline, highlighting their need for easily accessible educational resources. Examples of this content were indicated to be: video tutorials, informative posts on social media, in-store experiences, and workshops. Ultimately, consumers seem to be looking for a holistic educational approach from brands that empowers them with a better understanding of skincare as a whole.

d) Distribution Channels

It was revealed that the majority of respondents prefer buying skincare products in physical stores and primarily through perfumeries, namely at Sephora and Primor, and parapharmacies, specifically Wells. Regarding online channels, the interviewees reported resorting to these channels to either repurchase a product, find cheaper prices, or due to lack of in-store availability: *“Sometimes I purchase them online because it’s cheaper, but I only do this because I’m already sure that I know and I like the product”* (Female, 22, Skintellectual).

e) Wellness

The respondents articulated that their skincare habits were frequently initiated in response to skin concerns. These concerns were often contributing to low self-esteem, negatively impacting their mental health. In contrast, some participants expressed that incorporating specific products into their routine allowed them to improve their self-image and boost their confidence as it bettered their skin condition, enabling them to feel more *“beautiful”* throughout the day.

Beyond this, participants also highlighted the positive influence on their wellbeing routine regardless of having skin concerns or not. For some, it represented a self-care moment: *“Doing my skincare is about wellbeing and taking time for myself.”* (Female, 22, Skintellectual). Therefore, it

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appeared to serve as an opportunity to approach wellness holistically, integrating beauty into their well-being habits: “(...) it started with body care, food, and physical exercise, and I thought that if I take care of the food and my body, then the face should also be taken care of.” (Female, 23, Curious).

3.2.2.2 myClarins Insights

a) Awareness

The present research has revealed limited awareness of myClarins among respondents. When asked to recall skincare brands, none of the participants mentioned the product range as top-of-mind, nor was it ever recalled. Most answers to top-of-mind and recall were pharmacy brands, namely La Roche Posay, CeraVe, and Avène. The same pattern occurred when participants were asked about their favorite and most suitable brands, as myClarins was never mentioned.

When shown myClarins’ logo, several respondents affirmed they recognized it, even though they had never tried any of its products: “I know myClarins but I’ve never used it” (Female, 28, Skintellectual). However, in some of the testimonies, it became unclear whether they recognized it as having an identity of its own, or simply associated it with Clarins, potentially perceiving them as one and the same: “I don’t know what the difference is, maybe I don’t know it” (Female, 21, Newbie). Nevertheless, a small number of participants reported using myClarins, usually only one product: “MyClarins I do not use as much, I have a lot of products from this line but only really use the cleansing gel now” (Female, 21, Newbie).

b) Personality Perception

The interviews also shed light on the perception of myClarins’ personality relative to Clarins and respondents’ favorite brands (Appendix 12). In general terms, the most frequent characteristics used to describe myClarins were “young”, “girl”, “skincare”, “makeup”, “daughter”,

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“teenager”, “care”, “nature”, “university”, “20s”, “woman”, and “student”. In contrast, Clarins was mostly described as *“old”, “lady”, “city”, “business”, “classy”, “social”, “older”, “elegant”, “job-oriented”, “works”, “French”, and “mother”*. Thus, a difference in respondents’ perception of the two brands can be observed. myClarins seemed to be perceived as a youthful, female-oriented, and nature-inspired brand. A connection with the category of the products the brand sells (i.e., skincare and makeup) was also present. On the other hand, Clarins was perceived as a mature, business and city lifestyle-related, female-oriented, classy, elegant, and social brand. A connection with the French heritage was also visible.

Concerning the top-of-mind brands, the three most referenced brands throughout the interviews were analyzed – i.e., CeraVe, Avène, and La Roche-Posay. CeraVe was predominantly described as *“accessible”, “young”, “simple”, “professional”, “organized”, and “university”*. In turn, Avène as *“simple”, “20s”, “30s”, “beach”, “delicate”, “calm”, “garden”, “style”, “pool”, and “young”*. Lastly, La Roche-Posay was defined as *“20s”, “woman”, “healthy”, “family”, “sea”, “intelligent”, “influenced”, “professional”, “Sunday”, “gym”, and “holidays”*.

Elaborating on the meaning of these associations, all three brands were perceived as youthful, with Avène being seen as slightly older. CeraVe’s characterization as an *“accessible”, and “simple”* brand, suggest an approachable and straightforward image. Moreover, descriptors such as *“professional”* and *“organized”* imply a sense of reliability and efficiency. Avène shares the quality of being *“simple”*, however, additional associations such as *“beach”, “delicate”, and “calm”* evoke a serene personality. Furthermore, mentions of a *“garden”, and “pool”* further emphasize a lifestyle-oriented brand. Lastly, La Roche-Posay has a particular emphasis on *“woman”, suggesting a female-oriented brand, and “healthy”*. Terms like *“family”, “sea”, and “holidays”* also suggest a focus on well-being and relaxation. However, the adjectives

“intelligent” and *“professional”* indicate a brand with a more serious image, potentially targeting a more discerning consumer base.

Overall, both Clarins and the top-of-mind brands possess a fairly consistent perception, with associated personality attributes. Conversely, a rather broad and unconsolidated brand image of myClarins is observed, as age seems to be the most prominent way of characterizing it. Additionally, the product category was mentioned when human characteristics were requested. This fragmented image showcases a relatively personality-disconnected perception.

Ultimately, myClarins’ *“daughter”* and Clarins’ *“mother”* aspects could be attributed to the previously mentioned lack of clarity on the difference between the two brands. Despite the absence of transposed personality characteristics, respondents unaware of myClarins might have associated it as the *“daughter”* of Clarins.

4. Challenges & Opportunities

This section intends to seamlessly integrate the discussion of challenges and opportunities, recognizing that a comprehensive understanding of both is essential for accurately diagnosing myClarins and its current situation.

4.1 Challenges

4.1.1 Highly Competitive Landscape

Firstly, myClarins is embedded within a highly competitive landscape. The predominant role of private labels, as propelled by the target’s low purchasing power, in the growth of the Portuguese mass skincare market could pose a challenge for myClarins’ *masstige* positioning. Moreover, the distribution of myClarins products by third-party distributors to discounter perfumeries can result in a misalignment with the range's ideal competitive marketing mix. Simultaneously, the frequent utilization of significant price promotions in the aforementioned discounters may occasionally

place myClarins at a disadvantage. This is particularly noteworthy considering that pricing was identified as a significant factor influencing skincare consumers' decisions at various stages of their CDJ. Additionally, the undeniable superiority of pharmacy and parapharmacy brands in terms of top-of-mind, recall, recognition, favoritism, suitability, and usage noted in the in-depth interviews reveals a more difficult path for myClarins to succeed in those areas. Furthermore, some Gen Z preferences such as *prejuvenation* could impact the product range. In this case, consumers and prospects looking for traditional anti-aging products or ingredients would seek alternatives.

Lastly, competitors have been identified with similar value propositions as myClarins. In particular, Typology and Caudalie exhibit a closely aligned price range and natural composition. In this regard, myClarins is missing a USP¹¹ for competitive advantage.

4.1.2 Limited Awareness

Several factors evidenced limited awareness of the myClarins product range. Its inexistent mention in the top-of-mind, recall, favoritism, and suitability questions, as well as respondents' ambiguity in distinguishing between myClarins and Clarins, collectively conveyed an awareness challenge. Additionally, the broad, unconsolidated, and personality-disconnected image further reinforces this diagnostic. Thus, some variables identified could help explain this phenomenon.

Firstly, as a product range, it is challenging to communicate myClarins' distinctiveness relative to Clarins. Nonetheless, they possess a significantly distinct identity (Figure 2), thus the uncertain divergence from the consumer's perspective should not occur.

Moreover, myClarins' current distribution channels could also be contributing to this. As seen in the interviews' insights, respondents expressed a preference for physical stores, namely Sephora, Wells, and Primor. However, as previously mentioned, my Clarins' products are no longer sold in

¹¹ Unique Selling Proposition.

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Sephora's physical stores and those available in Primor and Wells are not directly distributed by the brand. Furthermore, the Marketing Team intends to shift the focus of myClarins product sales toward online channels. Consequently, it can be inferred that myClarins' distribution is misaligned with the target's preferred purchasing channels. In addition to this, the awareness challenge is compounded by the limited visibility of the range within existing channels.

Furthermore, interviewees identified social media as a key factor in their decision-making process, impacting the trigger stage for all segments and the initial consideration stage for the Curious and Skintellectuals. It is important to note that it is in these stages that consumers encounter new brands and as such are crucial for the creation of brand awareness. Thus, despite myClarins' current incorporation of posts with content desired by the target (i.e., informative videos and product hauls), its execution is not optimal. In fact, such posts are somewhat limited and at times do not accurately represent the target's characteristics and preferences. Besides, myClarins' social media falls short in exploring other forms of content favored by Gen Z, such as GRWMs and before-and-after posts. These recognized shortcomings may be partly attributable to constraints imposed by the French Headquarters' guidelines as well as implications associated to being a product range within Clarins.

As a final note, loyalty remains undefined, as its identification is dependent upon the establishment of awareness, which has not yet fully occurred.

4.2 Opportunities

On a more optimistic stance, the growing relevance of the global beauty industry in the following years, namely skincare, presents an inherent opportunity. Likewise, in Portugal, the positive trajectory of the skincare category is noteworthy.

4.2.1 Targeting

Concerning targeting, two of the three consumer segments identified should be considered. Given myClarins' educational skincare approach, each segment's potential is mainly determined by their current skincare knowledge. In concrete terms, myClarins' priorities should be firstly Newbies and secondly Curious. The Newbies segment exhibits limited skincare knowledge and practices, and thus could greatly benefit from and appreciate myClarins' approach and offer. Nonetheless, it is important to consider that within this segment, the purchase might not be made by the immediate target (Gen Z), but rather by the shopper target, thus further considerations should take this into account. Moreover, although not to the same extent, Curious consumers still have room for growth in terms of their skincare knowledge. Additionally, this segment is currently navigating its "trial-and-error" phase, posing an opportunity to embed myClarins in their routines. However, given the greater understanding of their skin and potentially more elaborate routine in contrast to Newbies, myClarins might not fully meet their needs. Lastly, the potential of Skintellectuals is somewhat constrained due to their advanced knowledge and well-established routines. As a result, their likelihood of experimenting myClarins products is limited.

4.2.2 Positioning

Drawing from the identified challenges, myClarins has an opportunity to establish a competitive advantage, that when consolidated with other factors will allow for brand awareness enhancement and loyalty creation. In general terms, myClarins has a chance to use the "*my*" in its favor, creating a concept of empowerment through the acknowledgment of individuality, where consumers feel comprehended and listened to. Details on the wider framing of this USP will be outlined at a later stage (refer to Section 6).

4.2.3 Awareness Enhancement

The possibility to create awareness could arise from being where Gen Z consumers and prospects are, whilst using the correct techniques. Given this generation's integration of the digital world in their lives alongside the emphasized importance of social media, myClarins stands to benefit greatly by investing in this area. Nonetheless, the strongly valued in-store experiences should also be considered, presenting an opportunity to integrate both channels.

Additionally, throughout all identified segments, the influence of peers in generating awareness is unquestionably significant. The myClarins range could capitalize this by making consumers brand ambassadors, a status attainable if consumers reach the loyalty loop stage of the CDJ with myClarins. The forthcoming section will delve into the opportunities that can be utilized to accomplish this.

4.2.4 Loyalty Creation

Once brand awareness is successfully established, it is vital to meaningfully engage with consumers to lead them on a path toward loyalty. The substantially elevated levels of loyalty exhibited by Gen Z are particularly encouraging in the pursuit of this goal.

First, the community-centric focus contemplated in myClarins' current approach is aligned with the target's preferences. Accordingly, such a goal should be perpetuated.

Additionally, research has demonstrated that one of the major triggers and influencing factors for skincare and the decision on products is skin concerns, specifically acne. "*My Skin Solutions*" (Appendix 2) products provide treatment for imperfections, which could be then explicitly connected to actual skin issues. Moreover, "*My Skin Essentials*" (Appendix 2) products, in turn, are focused on hydrating the skin, an important benefit as well as seen on the Newbies and Curious segments' consumer decision journeys.

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Furthermore, myClarins has the opportunity to use other existent characteristics within the product range that, if effectively communicated, can further enhance its Gen Z and empowerment positioning. For instance, myClarins' simplistic approach towards skincare relates to the *skinimalism* consumer trend, and its natural and vegan product composition resonates with Gen Z's general preferences and with the importance of sustainability similarly uncovered in the conducted interviews. Moreover, the *prejuvenation* challenge identified above could be minimized if myClarins were to convey its ingredients' anti-aging properties. Although the range does not encompass products that directly fulfill anti-aging needs, the previously mentioned hydrating and antioxidant ingredients are components beneficial to prevent aging (Estée Lauder n.d.).

In addition to this, the identified desire for transparency and authenticity, and for reflecting consumer's values could be equally leveraged by myClarins, through coherent and efficient communication of such. Even though initiatives consistent with these aspects are already conducted by the range, related with the ingredients, diversity and inclusion, further improvements could take place. Concretely, communicating the process behind the products besides the ingredients or better representing each consumer's individuality can be indispensable.

Moreover, the significant influence of price in consumers' decision journeys, coupled with its connection with overall Gen Z's expectations could present an opportunity. Given this generation's inclination toward seeking value for money, myClarins could convey the added value inherent in its product quality, along with the above-mentioned aspects, ranging from targeting skin concerns to embodying transparency and authenticity.

Lastly, the perspective of skincare as intrinsically related to wellness is an opportunity to further engage with the target. Moreover, its informative aspect is pertinent given the Gen Z education-driven consumer behavior identified throughout both primary and secondary research, namely the Curious segment.

Overall, developing the angles mentioned above would facilitate the unique selling proposition in terms of its undeniable shaping to the target. If consumers are engaged with myClarins, a community can be formed in a way that they feel part of the brand.

5. Limitations

Despite its valuable insights, the diagnostic conducted is not exempt from limiting factors that might have influenced the conclusions drawn. The ensuing limitations are relative to the desk research and the qualitative research conducted (i.e., shelf analyses and in-depth interviews).

Firstly, the difficulty experienced in accessing Portuguese market data, namely for the *masstige* price segment, hindered a fully comprehensive representation of this market and its unique contextual factors. Similarly, information relative to Gen Z specificities comprised a global view rather than one specific to Portugal. Although several aspects were reflected in the primary research conducted, such as the value for money or the educational aspect, future research could focus on further investigating Portuguese Gen Z specificities.

Concerning primary research, namely the shelf analyses, the geographical constraint aspect influences the reliability of the findings. The insights being solely from the Lisbon area limits the extrapolation of findings to the country level. Consequently, an analysis of the current distribution channels in other regions could have been pertinent.

In addition to this, the convenience sampling method employed in the in-depth interviews introduced issues such as a potential lack of reliability and validity. This was manifested in the overall homogeneity of the sample in terms of age, gender, employment status, highest level of education, nationality, and place of residency. Nonetheless, nationality homogeneity was expected given that the research focused on the Portuguese market. Acknowledging this, the requirement for only one year of residency in the country might not have represented an ideal time frame, as it is

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most likely insufficient for those consumers to be fully immersed in the market dynamics. Additionally, myClarins' price increase since the interviews poses a sampling issue, as the slight rise beyond the 30€ threshold could have excluded some participants. Furthermore, conducting some of the interviews online might have resulted in a loss of control of the environment by the interviewers, as creating a comfortable and engaging atmosphere is more challenging.

Moreover, despite providing interesting insights into myClarins' awareness and perception, respondents' inability to distinguish Clarins and myClarins could have led to some misinterpretation in the analysis.

Lastly, due to the ever-changing skincare competitive landscape, continuous monitoring should take place to ensure accurate data to solidify decision-making.

6. Introduction to Individual Reports

Before delving into the individual reports, it is crucial to delineate the overarching theme that will serve as a compass, ensuring the recommendations contribute to myClarins' objective to empower Gen Z. As briefly mentioned in the opportunities, myClarins should leverage the “*my*” notion to establish a concept of empowerment through the acknowledgment of consumers' individuality. Beyond individuality, this would act as a pledge to comprehend and acknowledge Gen Z's needs, preferences, and identities. Overall, this concept aims to elevate myClarins' name beyond a mere label and create a narrative that embraces the “*my*” within myClarins' identity.

In addition to this, given myClarins' unique identity and positioning, the ensuing recommendations were built upon the foundational suggestion that myClarins be positioned as a sub-brand rather than a product range within Clarins. This separation would allow to emphasize myClarins' unique identity, ensuring that it is not overshadowed as an extension of Clarins. Hence, enabling Clarins to protect its legacy prestige identity whilst simultaneously targeting Gen Z in

Portugal. Separating myClarins' distinct identity and proposed USP, facilitates targeted marketing and a strengthened position within the market, promoting myClarins' ability to accurately reach Gen Z and address their needs, preferences, and identities. Moreover, as a sub-brand, myClarins would still benefit from Clarins' strong brand equity and recognition, capitalizing on its already established credibility. Nonetheless, despite this independence, myClarins must be particularly careful to still be rooted in Clarins' culture to prevent brand dilution. With this said, the following reports will outline how Portugal could serve as a pilot market to test this separation. For this reason, throughout the recommendations, myClarins will be referred to as a brand rather than a product range.

Given the outlined diagnostic, the forthcoming recommendations are composed of five main components: (1) a self-concept targeted messaging approach; (2) an alignment of online and offline distribution channels to meet Gen Z needs; (3) a communication strategy to develop an effective approach to social media channels; (4) a marketing strategy focusing on myClarins' educational content; and, lastly, (5) a strategy to incorporate wellness into myClarins' marketing initiatives. These individual projects are strategically aligned to contribute to both the establishment of brand awareness and the subsequent enhancement of brand loyalty.

6.1 Quantitative Research

To gain additional insights to better approach the five topics mentioned, a survey was developed and conducted on Qualtrics (Appendix 13). The sample was collected through the group's social networks as well as other general discussion web forums. Participants were filtered based on whether they (1) were between the ages of 13-29, (2) had lived in Portugal for the last 3 years, (3) had a skincare routine, and (4) would be willing to spend between €20–€35 on a skincare product (*myClarins* updated price, November 2023). Adjustments were implemented to the filters

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in response to the qualitative findings. The age range was widened from 16–29 to 13–29 based on insights extracted from the interviews, revealing that respondents initiated their skincare journeys before the age of 16. Moreover, the time living in Portugal was extended to three years instead of initially one year. This decision was based on the rationale that a three-year time interval allows the foreign respondents to have the time to comprehend, develop, and integrate themselves into Portuguese consumption habits and routines.

In terms of structure, the survey included filter questions, six distinct sections, and a final demographic section. The first five sections pertained to each of the individual topics and the respective insights will be addressed in the individual reports. Moreover, the sixth section pretended to consolidate the previous findings relative to myClarins. This involved inquiries about participants' awareness of the brand, how they became familiar with it, and lastly, their personality perception of myClarins. Lastly, to prevent miscommunication, the respondents could choose between answering the survey in Portuguese or English.

6.1.1 Sample Characterization

The sample under study comprised 353 individuals, however, after the initial filters only 213 participants were eligible to continue the survey. In addition, due to the filters within each section and the absence of an obligation to respond to every question, the number of participants varied across the survey. As a result, not all respondents answered the final section, corresponding to the demographic information. This explains the diminished numbers seen in Table 5.

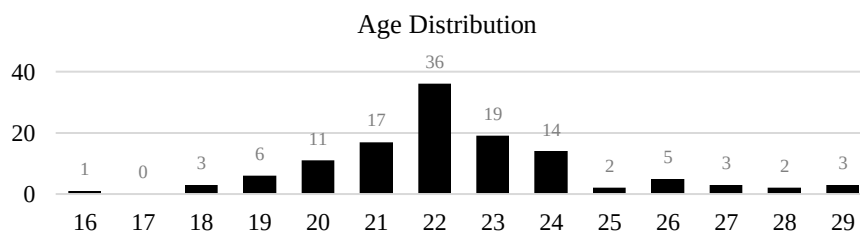


Figure 4 – Quantitative Research: Age Distribution

Table 5 – Quantitative Research: Sample Characterization

Demographic Data		Frequency	%
Gender	Female	98	80%
	Male	24	20%
	Non-binary	0	0%
	Prefer not to say	0	0%
Employment Status	Student	75	61%
	Active Employee	18	15%
	Student worker	27	22%
	Unemployed	2	2%
Highest Level of Education	Middle School	0	0%
	High School	23	19%
	Bachelor's Degree	78	63%
	Post-Grad or Masters Degree	22	18%
	PhD	0	0%
Place of Residency (Region)	Açores	0	0%
	Alentejo	2	2%
	Algarve	1	1%
	Center of Portugal	20	16%
	Lisbon	77	63%
	Madeira	2	2%
	Porto and North	20	16%

7. Contextual background

7.1. Social Media Marketing

The rise of technology led brands to incorporate social media in their marketing strategy, social media which followed to the decreased use of traditional marketing (Sharma and Kalra 2020). According to McKinsey (2023), social media is “the applications and websites that allow people to interact with other users, businesses, communities and content”. Therefore, social media has changed in the sense on how people communicate with each other and business dynamics, fostering creativity and improving global and efficient news. There are several different types of social media. According to a study made by Pew Research Center, 84% of the individuals between 18 to 29 years old affirmed using at least one type of social media platform (McKinsey & Company 2023).

In addition, it is seen that social media has an impact on consumers in all stages of their consumer decision journey, having the power to increase brand awareness, recognition or lead to the purchase intention. By this means, there is a strong relationship between social media and consumers and, as platforms evolve, more opportunities for brands to communicate and connect with their target are emerging (Forbes 2023). Instagram, YouTube and TikTok are some of the platforms that Gen Z normally uses and interacts with the most (Lebow 2022). Regarding the time spent on social media, half of Gen Z respondents check social media multiple times a day and over one-third of Gen Z say they spend more than two hours each day on platforms (Coe et al. 2023).

According to the article in BOF (2020), TikTok is the social media platform most used among Gen Z. This platform unlocked a window of new opportunities for beauty brands when it comes to creating new ways to communicate with Gen Z by following the latest trends, building tutorials, telling stories and content that align with their consumers. Most of the trends that are

created can last a few weeks on the platform or can even become a movement. In addition, this platform fosters building communities and interactions between Gen Z, leading to trust among the users. This way, by prioritizing the users, TikTok has become the platform where Gen Z can be themselves, show their true self and share their struggles, in a space where not being perfect is acceptable (Copping 2022).

A perfect example of a brand that grew based off the TikTok platform was The Ordinary through the implementation of UGC content. This skincare brand went viral all over the platform due to the different users freely promoting the brand by making reviews of the products and recommending it to people. This brand became so popular because it was actually “normal individuals” that were promoting it which made it more trustable, since consumers were just sharing their experience without being paid from the brand (Appendix 14) (Foundation 2021).

Beauty brands acknowledge and use it for the benefit of creating content that is genuine and that resonates with Gen Z in a way that consumers do not feel that they are just being sold products (Kennedy 2022).

7.1.1. Social Media in Portugal

According to a study done by OOSGA consultant firm (2023), in 2022 there were around 8.6 million active users on social media in Portugal, accessing one of their social media platforms at least once a month. In addition, 47.9% of Portuguese users affirm to search for brands or products on social media platforms. Portuguese users, normally, access social media platforms to stay in touch with their social circle, to be updated with news, searching for information, learning new things and search for brand or products (Gomes 2023).

7.1.2. Social Commerce

Social Commerce is associated to e-commerce in which it simplifies transactions between brands and consumers through digital platforms. This process revolutionizes how brands connect with customers, offering an engaging and less promotional experience (Lin, Li, and Wang 2021). UGC creators are a perfect example in which they can showcase their skincare routines using the branded product. This authentic approach allows people to make convenient purchases directly within the platform without going to the brands website. In fact, based on a study done by Mckinsey, 61% of adults younger than 25 made a purchase on social platform while staying in the app (Mckinsey & Company 2023). Influencer Marketing, Social Media Advertising, Content Marketing, UGC, live streaming events are examples of different tactics of social commerce to develop in a brands communication strategy (Tech Target 2023).

7.1.3 Content Marketing

Content Marketing is a marketing strategy that aims to create brand awareness, recognition and make brands top of mind when the consumers are purchasing a product. Therefore, content marketers aim to draw in, hold on to, and expand their audience (Ansari et al. 2019). Furthermore, with the advancement of technology, content marketing has a huge influence when building and establishing with brands and consumers value with the help of social media platforms as e.g Instagram, TikTok and YouTube. As the strategy has such a huge influence on the brand, the brands are always investing to create, improve, promote content and partnering with creators to help build a better experience and purchase for the customer (Zhang and Zhang 2023).

This way to create content, brands should understand their target and discover where they are at. Many of the factors could be age, demographics, gender, interests, level of education. When knowing the target audience, myClarins should understand the goals that they want to achieve,

which could be brand awareness and brand recognition. Then it is fundamental to create different types of content based on the audience, create content through images, videos, videos stories, lives, infographics, ads. Lastly, in order to foster confidence and preserve the consumers' trust, content marketers need to ensure that the content being transmitted is clear and authentic (du Plessis 2022).

7.1.4 Influencer Marketing

Influencer Marketing is a strategy that has the intention to influence individuals to become consumers, impact them on their purchasing decision and build brand awareness (Kim and Kim 2021). The size of the Influencer Advertising market is expected to reach €40.08 million in Portugal by 2023 on Ad spending. The expected annual growth rate of Ad spending is estimated to be 9.78%, having a volume of €63.92 million in Portugal by 2028 (Statista 2023).

Therefore, it is visible that brands are investing a lot in this market, but it is important to understand how they can efficiently reach their consumers through influencer marketing. By this means, brands have the challenge of fitting their brand values with the influencer that is most aligned with them (Roberts 2023). The best way for brands to utilize the influencer marketing strategy is to determine which platforms their consumers are actively at. Next understand the influencer that best fits with their brand and consumers in the sense of helping the brand reach their objectives. Influencers can be divided by the target audience that they built, being macro, mid, micro and nano influencers (Appendix 15)(Mondalek 2022).

It is important for the brands to fit these influencers based on the budget of the brand and values, as well as organizing them into categories that correspond to the brand's needs and that fit their target. The creator should also believe in the brands' credibility and align with the brand's goals (Jolly 2023). When choosing the influencer, it is also relevant to consider the long run relationship of the brand with the influencer, meaning that by building this relationship it will be easier to build

trust from the consumer (Venciute et al. 2021). In addition, after choosing the right influencer, the performance of the campaign is the next step. This step is important to balance the message that the brand wants to send to the consumer by providing the influencer with content that will also align with their communities, leaving the influencer with some freedom to create content in a way that will not seem as forced. Lastly, brands should understand how the influencer advertisement fits the goal that the company had and how the influencer affected the conversions, this means, understanding if there were more purchases from their consumer (Mondalek 2022).

An example of building this strategy can be seen by the retailer Sephora. The retailer made a partnership and contract for one year with influencers. These influencers would have to create content for the brand and in exchange they would receive mentorship, gifted products and other benefits. Sephora's main goal is to build a strong relationship with these influencers and help the brand built a sort of community with Sephora and allowing their followers to be part as well (Mondalek 2021).

7.1.5 Gen Z influence on Social Media

In contemporary society, Generation Z exhibits a strong inclination towards prioritizing authenticity, transparency, and individuality. Having come of age in an era inundated with information, they possess a keen ability to understand if something is genuine or not (BOF 2020). Therefore, these online platforms and brands must be honest in their interactions with this generation. Failure to do so may result in a loss of credibility or, worse, the downfall of a brand (Anderson 2023). This generation prefers visual learning instead of conventional text-based learning. Proximately 40% of youth access Instagram or TikTok instead of Google to search for information since it's a more visual approach and quicker to absorb content (Media Tool 2023).

Furthermore, this generation also cherishes diversity and inclusivity in the sense they want brands to recognize the diversity in culture, sexuality and want to make sure everyone is included. Aging is also a big factor to consider in this generation and its rising. Many of them are already opting for products that can prevent and reduce aging as SPF protection and anti-aging serums (Kennedy 2023).

When it comes to some insights done by McKinsey (2023), these trends include Gen-Z's pronounced loyalty to favorite brands (60%), a preference for gender-neutral beauty products (40%), and the popularity of brands like The Ordinary and E.l.f. since they showcase transparency and establish a true sense of community. Authenticity and relatability as previously mentioned, can be a challenge for beauty brands to engage in meaningful storytelling and community-building to build a sense of belonging. Therefore, it shows strategic importance for beauty brands to align with Gen-Z values, offering insights into loyalty drivers, product preferences and engagement through social media (BOF & McKinsey 2023).

7.2. Research Insights on individual topic

7.2.1 Quantitative Social Media insights

Based on the analysis previously conducted on the group project, it was seen that myClarins has low brand awareness. When focusing mainly on communication, there is a misalignment in the product range communication strategy on the social media platform with the mother brand, Clarins. Therefore, with the gathering of the qualitative insights, we saw that consumers were not aware of myClarins and that there should be a shift in the product range to brand myClarins, since the target audience and communication are different from the main brand, Clarins. The main insights gathered through the qualitative research, were that the interviewees when searching for content related to skincare are looking for: steps and applications when using a product, the benefits and

after the results. In addition, watching GRWM and showcasing the skincare routines, influencers or celebrities and unpaid reviews have also an effect when searching for skincare content.

For that reason, as the individual research has the intention to attract Portuguese Gen Z through communication and understand what is relevant to them, the conductive quantitative insights for the individual part started with a filtering question to understand if social media impacts the respondent's choice when it comes to skincare products. By this means, 96 of 126 consider social media important (Appendix 16). In this study, respondents revealed to discover skincare brands through various channels, namely social media platforms (85/91), through skincare experts (50/91) and lastly through personal recommendation as family and friends¹² (49/91). Based on these insights of the respondents of the survey these find social media very important when searching for more information on products and brands. Instagram, TikTok and YouTube are the platforms with the highest relevance, TikTok being mentioned as strongly important for 36/91, Instagram for 26/91 and YouTube 21/91. When considering somewhat important 45/91 respondents said Instagram, 30/91 mention TikTok and 34/91 mention YouTube. Therefore, TikTok is the platform where there are more respondents that have strong beliefs in considering very important when choosing its importance compared to the other platforms.

When moving forward to the rest of the quantitative analysis it is important to mention the fact that the questions were not mandatory, since the respondent could freely answer them without being pressured. Therefore, some questions have less respondents, since some individuals might not have identified themselves with the question or did not fully understand the question. Regarding frequency, most answered that they frequently (32/87) or sometimes (30/87) seek skincare-related information. When it comes to content, respondents found “more important or somewhat important

¹² The following insights are related to respondents reaching for information or recommendation through the online platforms.

interacting with sustainable and ethical practices (68/88), promotions or giveaways (66/88), and user-generated content (59/88). In terms of content format, short-videos (80/87) and images (70/87) were the most important to them when it comes to skincare content. On the other hand, Q&A and polls had a neutral opinion (28/87), since half mention it was an important format while the other half say it was not. Long videos had a higher number of people responding as neutral (41/86) and (32/86) important. Live stream was the format that was the least important among respondents (47/87).

Moving on to the importance of influencers, at first it was created a filtering question to understand the individuals that believe that influencers impact their choices when purchasing or looking for a skincare product, 68/89 affirmed to be impacted. Of 68 respondents, mention (40/68) that they are somewhat important. Concerning trusting influencers, 39/66 mention that they somewhat trust influencers feedback but there is a small group that was neutral and other that did not fully trust influencers. Considering Portuguese influencers, 29/68 mentioned none of the others, this could mean that Portuguese demographic of Gen Z does not trust or follow Portuguese influencers. Helena Coelho was the Portuguese influencer with highest trust rate 15/68 followed by Sofia Barbosa with 9/68.

When it comes to understanding respondents' awareness of myClarins, 85/122 mention that they are familiar with the brand. At first, one could imagine the brand awareness was lower, but the higher results on the quantitative analysis can be due to two factors. Either respondents were associating Clarins to myClarins, or our previous qualitative research might have influenced the knowledge of myClarins in the quantitative insights. Also, the brand activations performed to reach students could have potentially increased this value. Most respondents mention that they became aware through their social circle (42/85), more precisely friends and family and others mention social media (27/85).

7.3. Diagnostic Implications and Recommendations

7.3.1. Build brand myClarins differentiate from mother brand

The research that was previously analyzed and studied throughout the project led to the understanding that myClarins had limited brand awareness due to one of the reasons being related to how the brand communicates on social media. Since myClarins has a very specific target, Gen Z, the content posted on Clarins might not fully resonate with the consumer because Clarins is communicating to many different target audiences due to diverse product range collections.

It is visible that Clarins has some posts on social media to appeal to Gen Z by the fact that they create content in the form of short videos showcasing a routine or products. However, since the Instagram account caters for all their different products and ages, it is not reaching its full potential with Gen Z. This can also lead to low awareness by individuals not knowing the difference between myClarins and Clarins.

Therefore, the proposition to increase the visibility and brand awareness of myClarins would be to differentiate the product range as a sub-brand of the mother brand Clarins. In addition, to completely attract Gen Z, myClarins should have a separate account from Clarins to tailor the specific needs. Initially, the platforms that should focus on these needs are mainly TikTok, Instagram and YouTube since these are the social media with the highest engagement and importance among Portuguese Gen Z based on the quantitative insights and the contextual background. TikTok was considered strongly important (36/91), while Instagram (45/91) and Youtube (34/91) were mentioned somewhat important (45/91).

In addition, Portugal should also have separate accounts from France because Clarins Portugal does not exist on TikTok since it was not yet authorized by Clarins Headquarters to create the Portuguese Clarins account. Clarins should continue negotiating the permission of creating the account because there are many strategies that Clarins could implement for the sub-brand

myClarins. To do so, Clarins should have a Portuguese TikTok account first and then invest in myClarins account to showcase well the differentiation between them. On Instagram, Clarins has a Portuguese account with 23,1k followers and in the future could create a myClarins account. When it comes to the YouTube platform since Clarins in Portugal has 82 followers, the brand and sub-brand can create a section just for videos and content related to myClarins and yet still reinforce the difference between them. Therefore, this idea of separation of the brand could be experimented with and tested within the Portuguese market.

Overall, the next recommendations are to mainly showcase the differentiation between Clarins and myClarins and to build higher interaction with their target.

Social Media Campaign: After showcasing this transition between the brands, Clarins could build a social media campaign for all the different platforms, namely TikTok, Instagram and Youtube to showcase the transition of the separation. This could be done through a short video with storytelling that would be communicated in all the Clarins platforms to reinforce this change. The short-video would be built around the idea that myClarins is a young adult or teenager that is growing up and leaving for university while her mom, Clarins is witnessing this growth and lets her daughter become her own person. The campaign would appear on Clarins and myClarins TikTok and Instagram account. For Youtube the campaign would be posted in the Clarins account but in the section of videos related only to myClarins. Overall, the social media campaign could be the perfect way to leverage the differentiation of the brand through platforms and to effectively communicate to Gen Z in Portugal the difference between them as well as increasing brand awareness.

TikTok Campaign: The second recommendation would be to create a video in which a young face that belongs to myClarins showcases a GRWM and skincare routine with steps while

interacting about their life. This content would be posted on TikTok ideally one day on the myClarins account. myClarins could engage in the sense of creating a movement that is appealing to individuals on TikTok, and it would be advisable to create hashtags #myclarinschallenge #skincareroutine #GRWMmyclarins. People would then react to the video and create a video showcasing their skincare and taking part in the challenge. As mentioned before, TikTok is a platform that is highly valued among Gen Z and recognized in the Portuguese market based on the quantitative insights, this platform's most important communication tools are in the form of video and images. In addition, it was advised to create content in a structure of a challenge instead of just showcasing the products, since it is more valuable interaction (McKinsey & Company, BoF, 2021). With this TikTok campaign myClarins can build awareness and show the importance of building a skincare routine and creating a sort of community by engaging with their target and creating a safe place where consumers can also learn new tips and tricks.

Influencer Program: The next recommendation is creating an influencer program, in which myClarins would choose five influencers that were the most aligned with the brand's values. All five creators have different numbers of followers, but they have an interest in skincare. This means that the influencers can be related to lifestyle, fashion, travel, and skincare. They could be nano influencers and micro-influencers so that this initiative will have a more local approach and build a better and trustworthy relationship with consumers. One of the influencers could be a mid-influencer¹³, Sofia Barbosa since she was mentioned in secondary research, while the others could be for example: Inês Teixeira, Vicky Campelo, Catarina Nunes and Mel Barros, influencers who already have a good following base yet are still growing in the platforms (Appendix 38). This

¹³ Mid-influencer: Influencers that have 100k-500k followers on social media. Helena Coelho wasn't mention in this program since she is considered a macro-influencer by having more than 500k followers.

program would allow myClarins to build a strong relationship with the influencers for a longer period, in which the influencers would take part in the brand's events, connect with their team, and be part of social media campaigns. Hence, they would be an ambassador of the brand and create content that would include myClarins and still resonate the influencer's personal brand with their followers. This content could consist of short videos on TikTok and posts or reels on Instagram, more precisely, showcasing the different myClarins products and creating giveaways and promotions, since it was visible that Portuguese Gen Z is fond of that content. The content would be posted on myClarins and on the influencer's social media platforms.

This could follow the influencer strategy mentioned in 7.2.4. The intention of the program for myClarins would be to communicate with Gen Z in showing that the sub-brand wants to build a community of diverse individuals with a passion for skincare, promote authenticity, and showcase that on social media platforms.

Short-Film Episodes Campaign: For the Short-Film campaign, myClarins is advised to partner with an influencer such as Catarina Nunes, specifically to build short film episodes on YouTube. The influencer is creating a nice visual way of showcasing the myClarins world throughout the different short-film episodes exploring the Clarins Office, the Spa, its store in El Corte Inglés, showcases a deep-dive skincare with an expert from myClarins showcasing the needs that the influencer should have with her skin. To build this content in specific it is important that the influencer itself already creates this type of content so that way not only she's comfortable with creating it but also her followers will sense that the content is more authentic and genuine. In addition, the videos would be created in an appealing and fun way where Gen Z would feel like they were part of the scene. This campaign idea was based on the importance of authentic content that follows in the influencer strategy mentioned in the contextual background as well.

7.3.2. Build content to connect with Gen Z

Moving forward, the recommendation used focuses on communicating and creating content that resonates and builds a connection with Portuguese Gen Z. The content that will be focused on this part was driven by the insights from the secondary and primary research. All the following content should be in the format of short videos and images (post or story post) on the different social media platforms. The content that resonates with Gen Z is related to sustainability and ethical practice, giveaways or promotions, educational content, and user-generated content. When it comes **to sustainability and ethical practices** myClarins could showcase how the products and packaging are developed in a more sustainable way (by reinforcing the cruelty-free, vegan ingredients) and showcase videos showing how they produce the products. **Giveaways or promotions** a content that seems crucial for the Portuguese Gen Z and could be easily implemented throughout the different holidays, the giveaways could be implemented with partnerships with influencers and UGC creators. Moving to **educational content**, the brand could post content on Instagram showcasing the results of before and after using a specific product, as well as implement a different content in video format or image in which someone is explaining how to use the products. This content is showcased in other brands as well (Appendix 17). Partner with UGC creators to give honest reviews in feedback on platforms such as TikTok to build community and trust with Gen Z. Lastly, partnerships with **UGC creators to create content** as mentioned before as well as using social commerce would increase purchasing on social media platforms.

7.4. Conclusion

The sub brand, myClarins has various qualities and quality can appeal to Gen Z. Therefore, in order to reach its full potential myClarins should leverage social media platforms to communicate its values and showcase all different products with the assistance of influencer and UGC creators.

Individual Part – Kaylee Oliveira

Always keeping in mind, the transparency and commitment the brand has to creating natural and vegan products. As a result, every recommendation should be accurate and following a line in which they are building trust and forming a community with Portuguese Gen Z by communicating topics that also align with the values of this generation.

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Appendix 1) McKinsey's Beauty Price Segments

	Skin Care		Fragrance		Colour Cosmetics	
	Price Point	Illustrative Brands	Price Point	Illustrative Brands	Price Point	Illustrative Brands
Ultra Luxury	\$3,000+	La Prairie*	\$5,000+	Guerlain*	\$1,000+	n/a
True Luxury	\$200–3,000	La Mer	\$250–5,000	Byredo	\$100–1,000	Clé de Peau
Prestige	\$80–200	SK-II	\$100–250	Dior	\$60–100	Yves Saint Laurent
Entry Prestige	\$40–80	Shiseido	\$70–100	Hugo Boss	\$45–60	Bobbi Brown
Masstige	\$20–40	Kiehl's	\$45–70	Kenzo	\$25–45	Clinique
Mass	<\$20	Nivea	<\$45	Revlon	<\$25	E.l.f.

Source: BoF and McKinsey & Company, 2023

Appendix 2) myClarins 2023 Relaunch: New Strategy

New Concept	<i>"Healthy skin expertise"</i> 1. Educate & share 2. Healthy skin balance 3. Tailor-made solutions for targeted concerns
New Offer	<i>"To better answer Gen Z needs"</i> 1. My Skin Cleansers 2. My Skin Essentials 3. My Skin Solutions
New Approach	<i>"To help navigate within the brand"</i> 1. My Skin Cleansers – "to cleanse, prepare and detoxify" 2. My Skin Essentials – "to hydrate, energize and balance" 3. My Skin Solutions – "to recharge, treat and correct"
New Ecosystem	Community Centric Approach 1. Unite Gen Z around myClarins' values 2. Create a phygital destination

Group Part

	3. Be present in targeted platforms 4. Encourage conversation and UGC
--	--

Source: myClarins Presentation, August 2023



Appendix 3) myClarins 2023 Relaunch: SKUs

Source: myClarins Presentation, September 2023

Appendix 4) Retail Value of Skincare Offline Retail Channels in Portugal (2022)

Retail Channel	Retail Value (EUR million)	Retail Value (%)
Beauty Specialists (Perfumeries)	147.7	36.3%
Pharmacies	85.5	21.0%
Supermarkets	61.8	15.2%
Direct Selling	32.9	8.1%
Health & Personal Care Stores (Parapharmacies and Drugstores)	24.5	6.0%
Hypermarkets	20.7	5.1%
Department Stores	11.4	2.8%
Discounters	4.8	1.2%
Small Local Grocers	2.2	0.5%

Group Part

Convenience Stores	1.4	0.4%
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Source: Euromonitor, 2023

Appendix 5) Competitors Analysis Grid

MyClarins	€20,50- €34,50	Cream, mist mask, cleanser, treatment	vegan	=/> 88% natural	16/18 to 29	Oily, dry, normal, combo	Fruits and plants	natural skincare For Healthy-Looking Skin
Brand	Price	Similar Products Categories	Vegan	Natural composition	Target age	Skin type	Main/key ingredient(s)	Positioning itself
Caudalie	€10.90- €43.50	x	x	x	All ages	x (+ sensitive skin)	Grapes (fruits)	natural and sustainable skincare
Shiseido Waso	€25.50- €48.50 (similar price if in promotion)	x	x	x	Millennials	x (+ sensitive skin)	Frutis and plants	clean and natural beauty
Typology	€12.50- €37.90	x	x	x	All ages	x (+ sensitive skin)	Plants	going back to basics
The Ordinary	€5.00- €33.10	x	x	x	All ages	x (all types)	Science based formulas (vitamins, AHA, BHA, peptides)	affordable, science-driven skincare
Origins	€11.99- €79.99	x	Only some	x	All ages	x (+ sensitive skin)	Plants	Holistic skincare using the power of plants and science
Sephora Collection	€2.99- €22.99	x	Only some	x	All ages	x	Science based formulas and fruits	accessible, trend- conscious, and value- driven skincare
Florence by Mills	€5.65- €37.50	x	x	x	Gen Z	x	plants	beauty on your own terms
Avène	€5.06- €34.90	x			All ages	x (+ sensitive skin)	Thermal Spring Water	Rooted in dermatology and hydrotherapy
La Roche- Posay	€7.65- €45.60	x			All ages	x (+ sensitive skin)	Thermal Spring Water	health conscious, committed to their skin, and focused on safety and protection
Clinique	€6,40- €71,50	x			All ages	x (+ sensitive skin)	Plants, vitamins, BHA, AHA and peptides	Innovative and dermatological expertise
Drunk Elephant	€19.99- €92.99	x	Not everything	x	All ages	x (+ sensitive skin)	Biocompatible Skincare	unique and innovative skincare
Innisfree	€7.99- €39.99	x		x	All ages	x (+ sensitive skin)	Plants	natural and eco-friendly skincare and beauty brand

Group Part

Kiehl's	€13.00- €90.00	x		x	All ages	x (+ sensitive skin)	Plants	rooted in heritage, natural ingredients, and a commitment to customer well-being
Farmacy	€11.95- €69.50	x	(except the honey line)	x	All ages	x (+ sensitive skin)	Fruits and honey	Natural, clean skincare
Ole Henriksen	€18.99- €61.99	x	x	x	All ages	x (+ sensitive skin)	actives, naturally derived botanicals and essential fatty acids	Clinical Scandinavian skincare
Fenty Skin	€9.99- €59.99	x	x	x	All ages	x	Plants and fruits	treat, smooth, and tighten the look of pores
First Aid Beauty	€12.99- €57.99	x			All ages	x (+ sensitive skin)	oats	Daily skin essentials
Byoma	€13.99- €19.99	x	x		Millennials and Gen Z	x	Science based formulas (HA, Vit B3, Squalene, Green tea, Bakuchiol)	accessible and affordable barrier care
Pai	€19.99- €69.99	x	x	x	All ages	x (+ sensitive skin)	Rosehip oil	natural, ethical and sustainable

Sources: Clarins website, Caudalie website, Shiseido website, Typology website, The Ordinary website, Origins website, Sephora website, Florence by Mills website, Avène website, La Roche-Posay website, Clinique website, Drunk Elephant website, Innisfree website, Kiehl's website, Farmacy website, Ole Henriksen website, Fenty website, First Aid Beauty website, Byoma website, Pai website.

Appendix 6) Distribution of Independent Perfumeries in Portugal

Perfumeries	Number of Stores
Balvera	28
PerfumeArte	21
MASS	10
Lourdete	6
Others*	50

*Others include: B&, Oh-Lá-Lá, Skin & Companhia, 5&Essência, Rosa, GI, Espuma de Sabão, Cent&Doze, Vidago Spa, Romi, Cristiana, New Look, Marques Soares, Nucha, GI, Pó D' Arroz, and M&.

Group Part

Source: myClarins Presentation, August 2023

Appendix 7) Shelf-Analysis – Douglas Colombo



Cascais Shopping



Appendix 8) Shelf-Analysis – Perfumes & Companhia

Colombo



UBBO



Cascais Shopping



Appendix 9) Shelf-Analysis – El Corte Inglés (Lisbon)



Appendix 10) Pre-Recruitment Questionnaire

F1. Are you between the ages of 16-29?

No: finish questionnaire; Yes: F2

F2. Have you lived in Portugal for at least the past year?

No: finish questionnaire; Yes: F3

F3. Is skincare important/relevant to you?

No: finish questionnaire; Yes: F4

F4. Do you have a regular skincare routine?

No: finish questionnaire; Yes: F5

Group Part

F5. Would you be willing to pay up to €29 (*MyClarins price at the time, early September*)?

No: finish questionnaire; Yes: F6

F6. Please indicate your gender:

Female

Male

Other

F6. Would you be willing to participate in an interview regarding skincare?

No: finish questionnaire; Yes: continue to interview

Appendix 11) Qualitative Research: Interview Guide

Warm-up

Good morning/afternoon/evening. My name is ... and I am currently a student of the Master's in Management at NOVA School of Business and Economics. For the purpose of our thesis, we are conducting research related to skincare. For this purpose, I would like to interview you for approximately 45 to 60 minutes, by means of a semi-structured interview, which means that I will ask you several questions, to which there are not right or wrong answers and you are free to say whatever comes to your mind on the subject. For the purpose of analyzing our interviews later, I would like to record our conversation – would that be ok? It will remain anonymous and you will not be contacted further past this interview, in compliance with the General Data Protection Regulation (GDPR), of May 2018.

Section 1) Consumer Behaviour

1. What triggers you to choose skincare products? (skin concerns; ads; etc.)
2. What are the major sources of influence when it comes to skincare? (tiktok (who do you follow, who?); WOM (who); Instagram; ads (do you remember any specific ad?)).

Group Part

3. What do you perceive to be the necessary attributions/characteristics, for a certain product to be in your skincare routine? (targeted concerns/tailor-made solutions, clean, effective, eco-conscious, innovative, natural, free from toxic substances, healthy, vegan, organic, acne-related, hydration, hyperpigmentation, dark circles, etc.)
4. Do you purchase your skincare products yourself? If so, where/how?
5. Do you advocate for a skincare product you enjoyed?

Section 2) Skincare Usage

1. How did you initially become interested in skincare? Could you please tell me about your skincare journey?
2. Take us through your skincare routine. Be as specific as possible. (How many steps; how many products; are the products all from the same brand; how often)
3. Do you adapt your skincare routine to different seasons or climates?

Section 3) Skincare Brands

1. When you think of skincare brands, which names come to mind?
1st Skincare Brand mentioned – Top of Mind: _____
Other brands recalled: _____
2. What is your favorite skincare brand and why?
3. Is there any brand that you associate with having better products for your skin? Which one and why?

Group Part

4. In your opinion how can a skincare brand stand out for you? What do you look for in a skincare brand? (education, quality, price, ads/celebrity, image/package ,...)
5. In your opinion what type of content do you like to see the most on a skincare brand's social media?
6. Out of the following skincare brands, which ones do you recognize?
 - ☐ Drunk Elephant
 - ☐ Sephora Collection
 - ☐ Clarins
 - ☐ Estée Lauder
 - ☐ MyClarins
 - ☐ Origins
 - ☐ Caudalie
 - ☐ Shiseido Waso
 - ☐ Ole Herinksen
 - ☐ La Roche-Posay
 - ☐ Florence by Mills
 - ☐ Typology
 - ☐ Avène
 - ☐ Shiseido
 - ☐ The Ordinary
 - ☐ Clinique
 - ☐ Niod
 - ☐ Bioderma
7. Which of the mentioned skincare brands do you use? (Why?)
8. Which of the mentioned skincare brands would you like to use/try?

Group Part

9. Is there any other skincare brand we did not mention yet that you use or would like to use/try? Why?

Section 4) Projective Technique

If Clarins, myClarins, and [benchmark mentioned] was a person, what kind of person would it be?

How old would they be? What would be their occupation? How would they dress? Where would they live? What would their personality be like?

Wrap-Up

Alright! Coming to the end of the interview. I'd like to ask you some simple final questions that will help us characterize our sample.

Please indicate the following:

Age (in years): _____

Nationality: _____

Gender: _____

Place of Residency (Region): _____

Education: _____

Occupation: _____

Group Part

Kaylee Oliveira, 53940@novasbe.pt. By moving forward, you are giving informed consent for the utilization of your responses for academic research purposes, exclusively. If you are under the age of 18, you affirm that you have obtained consent from your parent or legal guardian. Thank you in advance.”

Section 1) Filter Questions

1. Were you born between 1994-2010?
 - Yes (*continue to F2*)
 - No (*finish survey*)
2. Have you lived in Portugal for the past 3 years?
 - Yes (*continue to F3*)
 - No (*finish survey*)
3. Do you have a skincare routine? Regardless of its simplicity or irregularity.
 - Yes (*continue to F4*)
 - No (*finish survey*)
4. Would you incorporate in your skincare routine a product that is priced between 20-35€?
 - Yes (*continue to Section 2*)
 - No (*finish survey*)

Section 2 – Impact of Skincare on Wellness

5. To what extent do you agree that the following factors **positively impact your** overall sense of wellness?

	1) Strongly disagree	2) Somewhat disagree	3) Neither agree nor disagree	4) Somewhat agree	5) Strongly agree
Having a consistent skincare routine					
Having healthy skin					

Group Part

Having skin concerns					
Using premium products					
Using natural products					
Using the appropriate skincare products for my skin					

6. Please rate your level of agreement regarding the following aspects:

“Having a proper skincare routine positively influences my...”

	1) Strongly disagree	2) Somewhat disagree	3) Neither agree nor disagree	4) Somewhat agree	5) Strongly agree
Self-esteem					
Confidence					
Social interaction with others					
Stress levels					
Mood					
Sense of self-care					
Sense of relaxation					
Restfulness before bedtime					

Section 3) Self-Concept Questions

7. To what extent the following personality attributes **apply to you?**

	1) Strongly disagree	2) Disagree	3) Somewhat disagree	4) Neither agree nor disagree	5) Somewhat agree	6) Agree	7) Strongly agree
Down-to-earth							
Honest							
Wholesome							
Cheerful							
Daring							
Spirited							
Imaginative							
Up-to-date							
Reliable							
Intelligent							
Successful							

Group Part

Upper class							
Charming							
Outdoorsy							
Tough							

8. Imagine how you would like to be. To what extent the following personality attributes apply to **how you like to be?**

	1) Strongly disagree	2) Disagree	3) Somewhat disagree	4) Neither agree nor disagree	5) Somewhat agree	6) Agree	7) Strongly agree
Down-to-earth							
Honest							
Wholesome							
Cheerful							
Daring							
Spirited							
Imaginative							
Up-to-date							
Reliable							
Intelligent							
Successful							
Upper class							
Charming							
Outdoorsy							
Tough							

9. How **important** is it for you that a person is...

	1) Completely unimportant	2) Unimportant	3) Somewhat unimportant	4) Neutral	5) Somewhat important	6) Important	7) Completely important
Down-to-earth							
Honest							
Wholesome							
Cheerful							
Daring							
Spirited							
Imaginative							
Up-to-date							
Reliable							

Group Part

Intelligent							
Successful							
Upper class							
Charming							
Outdoorsy							
Tough							

10. Think about a **skincare product you own**. To what extent do you agree with the following statements?

	1) Strongly disagree	2) Disagree	3) Neither agree nor disagree	4) Agree	5) Strongly agree
<i>Because of my personal attitudes, I feel that this is a product that ought to be important to me.</i>					
<i>Because of my personal values, I feel that this is a product that ought to be important to me.</i>					
<i>This product is very important to me personally.</i>					
<i>Compared with other products, this product is important to me.</i>					
<i>I'm interested in this product.</i>					

Section 4) Online & Offline Channels

11. Do you purchase your skincare products **yourself**?

- Yes (*continue to Q12*)
- No (*continue to Q18, Section 5*)

12. When **purchasing skincare**, do you have a **preference** for online or physical stores?

- Online channels
- Physical stores

Group Part

- Indifferent

13. From the following list, please select the stores from which you **have bought skincare products** (*select all that apply*)

	Online	Offline
Brand's official store		
Sephora		
Douglas		
Perfumes & Companhia		
Primor		
El Corte Inglés		
Pharmacy		
Wells		
Loja Bem Estar (in Pingo Doce)		
Saúde e Bem Estar (in Auchan)		
Supercor Espaço Saúde (in El Corte Inglés)		
Notino		
LookFantastic		
Skin.pt		
Pluricosmetica		
Other: <i>please specify</i>		

14. Please rate the following aspects regarding their relevance in your **in-store shopping experience** when purchasing skincare.

	1) Irrelevant	2) Slightly relevant	3) Neutral	4) Fairly relevant	5) Very relevant
Feel the products					
Smell the products					
Immediately obtain the product					
In-store environment					
Help of in-store assistants					
Personalized service					
In-store exclusive deals/promotions					
Loyalty rewards					

Group Part

15. Please rate the following aspects regarding their relevance in your **online shopping experience** when purchasing skincare.

	1) Irrelevant	2) Slightly relevant	3) Neutral	4) Fairly relevant	5) Very relevant
Price comparison					
Lack of in-store availability					
Wider product variety					
Convenience					
Speed					
Discounts					
Product Descriptions					
User-generated content					
Loyalty rewards					

16. Please rate the likelihood of purchasing a skincare product **online** given the following scenarios.

	1) Very unlikely	2) Unlikely	3) Neutral	4) Likely	5) Very likely
<i>"I'm familiar with a product and want to repurchase it"</i>					
<i>"I want to try a new product"</i>					

17. Please rearrange the following sentences to depict the **sequence of events** you engage in when purchasing a skincare product.

- Conduct product research online;
- Test and look at the product in-store;
- Purchase the product online;
- Purchase the product in-store;
- Pick it up in-store;

Section 5) Educational Content

18. Please select the colour pink (*control question*)

- Pink (*continue to Q19*)
- Black (*finish survey*)
- Orange (*end survey*)

19. Is being **knowledgeable about skincare** important to you?

- Yes (*continue to Q20*)
- No (*continue to Q28, Section 6*)

20. Which of the following statements resonates with you the most?

- “I am well-informed about my skin's needs and the products/ingredients suitable for it”
- “I am still experimenting to see which products/ingredients are most suitable for my skin”
- “I have limited knowledge of my skin’s needs and the products/ingredients suitable for it”

21. **Where** do you typically **seek skincare information**? (*multiple select*)

- Beauty and skincare blogs
- Social media platforms
- Skincare expert/professional
- Product reviews and testimonials
- Brand’s website
- Beauty magazines and publications
- Personal recommendations (i.e., friends or family)

22. How **often** do you actively **seek out educational content related to skincare**?

- Rarely, I don't actively seek out skincare education
- Occasionally, when I come across interesting topics
- Sometimes, if I need skincare-related information
- Frequently, I regularly seek out educational content on skincare

Group Part

- Always, I actively engage in continuous learning about skincare

23. Please rate the relevance of the following topics regarding the educational content you seek.

	1) Very irrelevant	2) Neutral	3) Relevant
Ingredient information			
Tailored skincare guidance			
Skin diagnostics (type, conditions...etc)			
Application techniques			
Scientific innovations			
Skincare trends			

24. Are you aware of any skincare brands' educational initiatives?

- Yes (*please specify*)
- No
- Not sure

25. Have you actively/ever participated in any of the skincare brands' educational initiatives?

- Yes (*please specify*)
- No
- Not sure

26. Would you be interested in participating in educational initiatives offered by skincare brands?

- Yes (*continue to Q27*)
- No (*continue to Q28, Section 6*)
- Not sure

27. To what extent would you be interested in each of these types of educational initiatives?

	1) Not interested	2) Neutral	3) Interested
Webinars			
Tutorials			
Virtual consultations with skin experts			
Online workshops			
In-person workshops			
Podcasts			
Quizzes/assessments			

Group Part

Informative guides/manuals			
Community-based events			
Lives			
Pop-ups Stores			

Section 6) Social Media

28. Does social media impact your choices in skincare products?

- Yes (*continue to Q29, Social Media Behaviour*)
- No (*continue to Q34, Section 7*)

Social Media Behavior

29. Through which social media channels do you typically discover skincare brands? (*multiple select*)

- Beauty and skincare blogs
- Social media platforms
- Professional dermatologists or skincare experts
- Skincare brands websites
- Beauty magazines and publications
- Personal recommendations from friends or family

30. To what extent are the following social media platforms important to you when choosing skincare?

	1) Very unimportant	2) Somewhat unimportant	3) Neutral	4) Somewhat important	5) Very important
Facebook					
Instagram					
Tiktok					
Twitter					
Youtube					
Pinterest					

Group Part

31. How regularly do you turn to social media to stay informed about skincare?

- Rarely, I don't actively seek skincare information.
- Occasionally, when I come across interesting topics.
- Sometimes, if needed I seek for skincare-related information.
- Frequently, I regularly seek out content on skincare.
- Always, I actively seek skincare information.

32. Have social media influencers impacted your selection of skincare products?

- Yes
- No (*continue to Q36 Desired Content*)

33. How important are influencer endorsements in your decision to try a new skincare product?

1) Not important	2) Somewhat important	3) Neutral	4) Somewhat important	5) Very important

34. To which degree do you trust influencers' feedback and recommendations of skincare products?

1) Do not trust	2) Somewhat distrust	3) Neutral	4) Somewhat trust	5) Completely trust

35. Are there any specific Portuguese influencers that you trust for skincare products recommendations? (*allow multiple select*)

- Helena Coelho
- Bárbara Corby
- Bárbara Inês
- Sara Vicário
- Sofia Barbosa
- None, I Don't follow Portuguese influencers
- Other (*please specify*)

Group Part

Desired Content:

36. To what extent are these types of social media content relevant to you regarding skincare brands? (*multiple select*)

	1) Very relevant	2) Somewhat irrelevant	3) Neutral	4) Somewhat relevant	5) Very relevant
Promotions/Giveaways					
Showcasing their events					
Showcasing products and collections					
Behind-the-scenes brand content					
Sustainable and ethical practices					
User-generated content					
Other (please specify)					

37. Please rate the importance of each of the following social media content formats for you:

	1) Unimportant	2) Neutral	3) Important
Images			
Long Videos			
Short Videos			
Text			
Live streams			
Q&A and Polls			
Podcasts			

Section 7) Clarins Questions

38. Are you familiar with myClarins?

- Yes (*continue to Q39*)
- No (*continue to Q41, Section 8*)

39. How did you become aware of myClarins?

- Social Media
- Personal recommendations (friends or family)
- Expert Recommendation
- In-store Recommendation

Group Part

40. To what extent do you agree with the following statements:

myClarins is...

	1) Strongly disagree	2) Somewhat disagree	3) Neither agree nor disagree	4) Somewhat agree	5) Strongly agree
Transparent					
Exciting					
Competent					
Sophisticated					
Tough					

Section 8) Demographic Questions

41. Please indicate your age: *(drop down menu)*

42. Please indicate your gender:

- Female
- Male
- Non-binary
- Prefer not to say

43. In which Portuguese region do you reside in?

- Açores
- Alentejo
- Algarve
- Centro de Portugal
- Lisboa
- Madeira
- Porto e Norte

Group Part

44. Please indicate your current professional status:

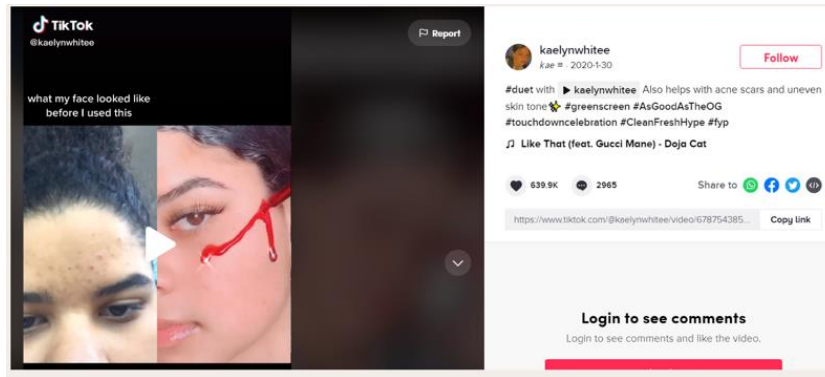
- Student
- Active Employee
- Working Student
- Unemployed

45. Please indicate your highest level of education:

- Middle School
- High School
- Bachelor's Degree
- Post-Grad or Master's Degree
- PhD

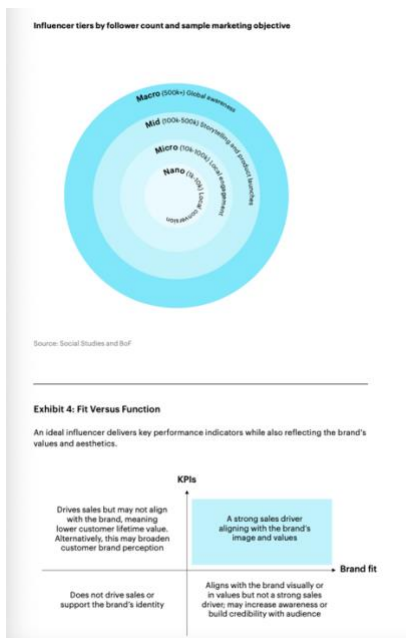
9.2. Appendices – Individual Parts

Appendix 14) A user on TikTok review and showcasing their results of using The Ordinary



Source: Foundation 2021

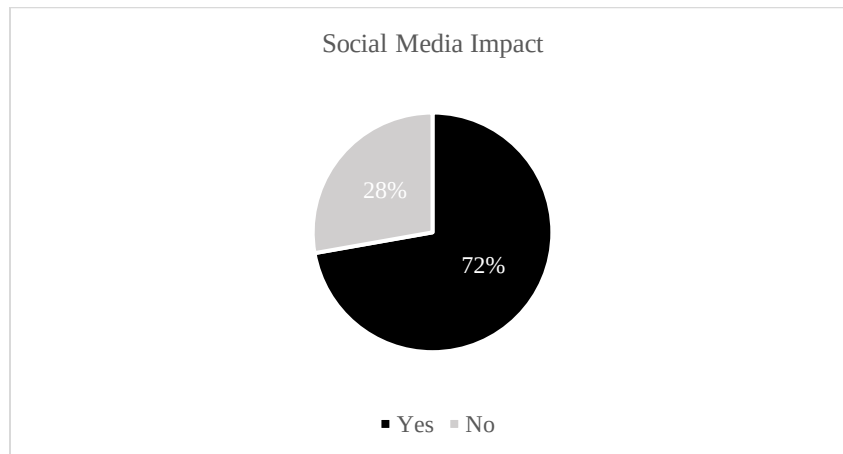
Appendix 15) The different types of influencers and follower count and Key performance indicators



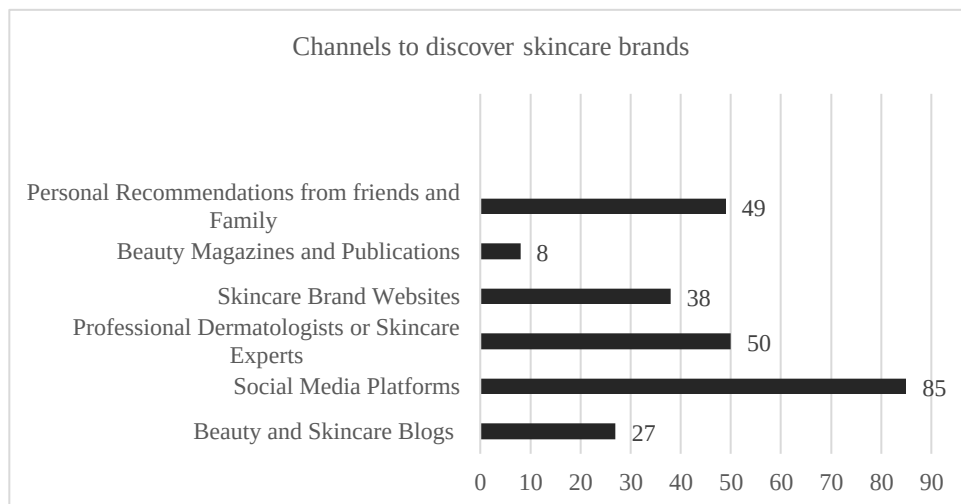
Source: Business of Fashion 2022

Appendix 16) Quantitative Insights related to Social Media, Influencer Marketing and myClarins

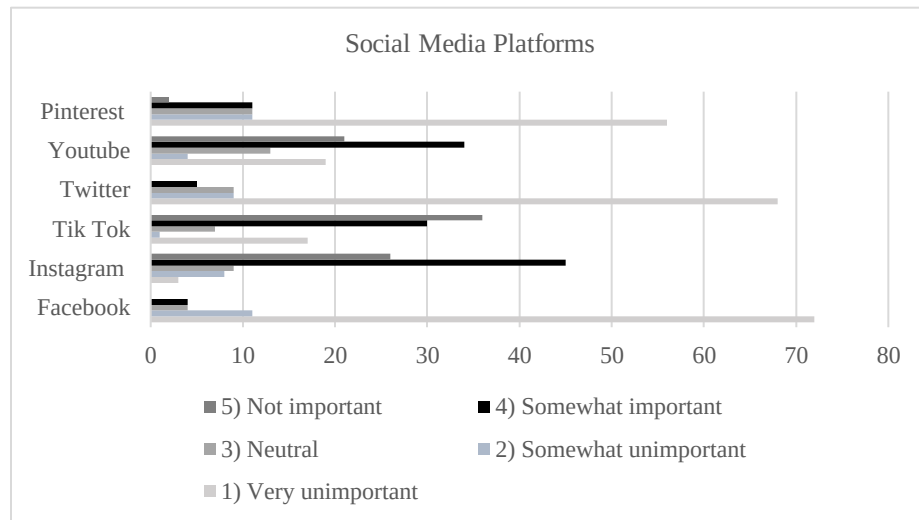
Q1: Does social media impact your choices in skincare products?



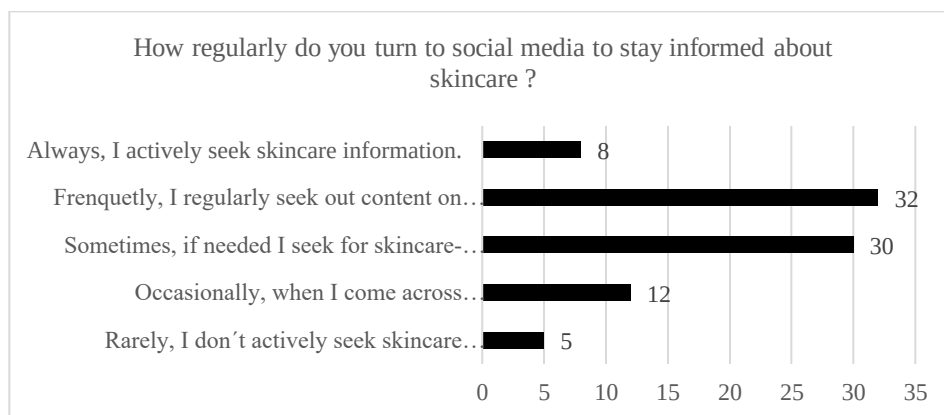
Q2: Through which channels do you typically discover skincare brands? (Select all that apply)



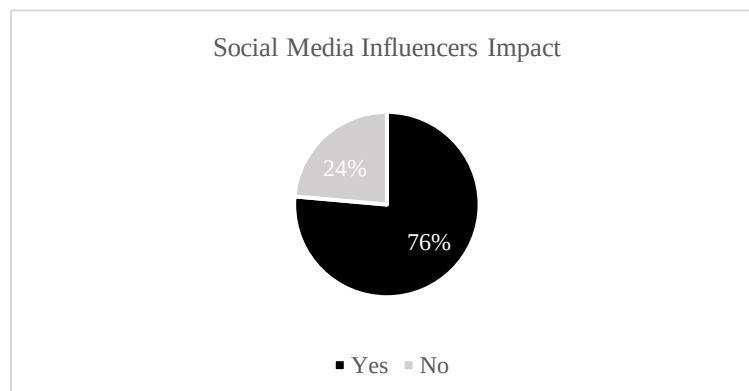
Q3: To what extent are the following social media platforms important to you when choosing skincare?



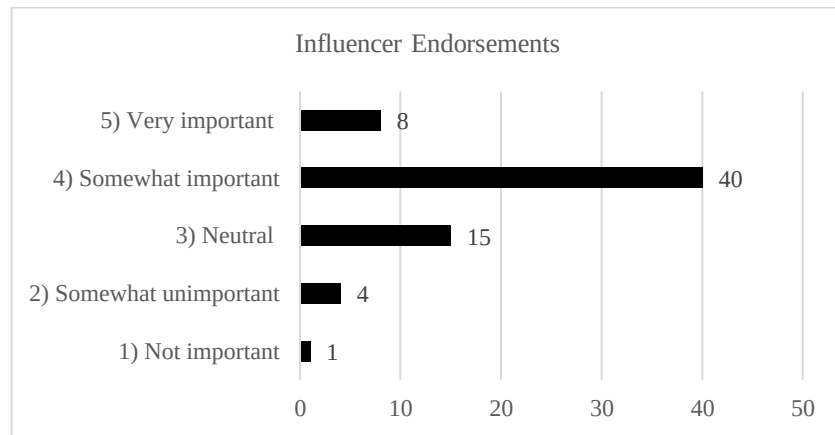
Q4: How regularly do you turn to social media to stay informed about skincare?



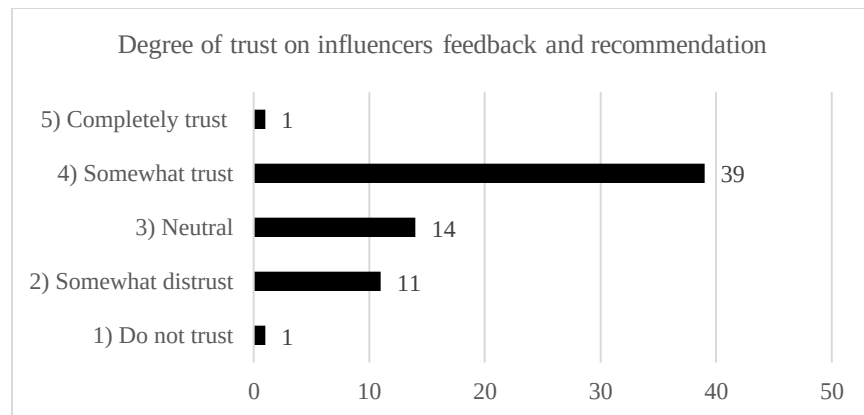
Q5: Have social media influencers impacted your selection of skincare products?



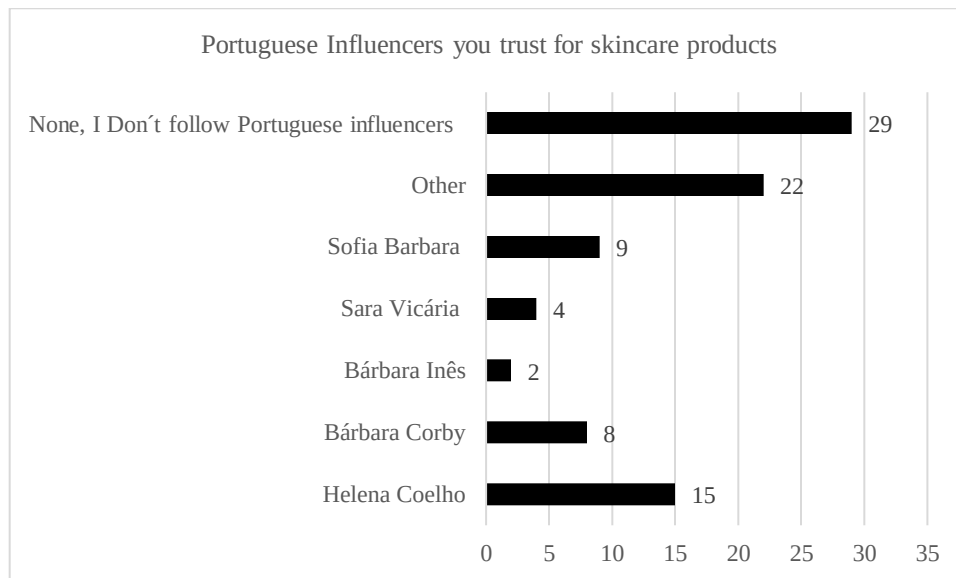
Q6: How important are influencer endorsements in your decision to try a new skincare product?



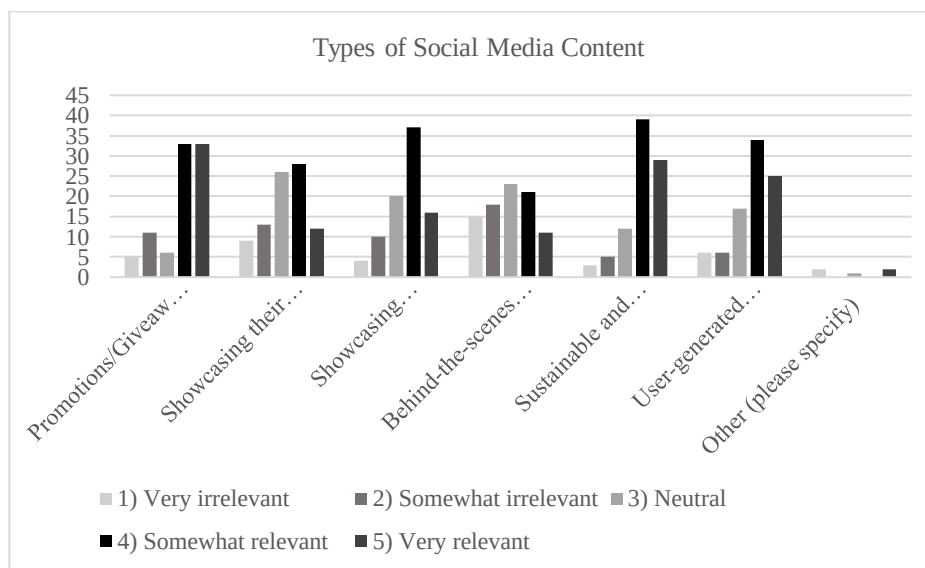
Q7: To which degree do you trust influencers' feedback and recommendations of skincare products?



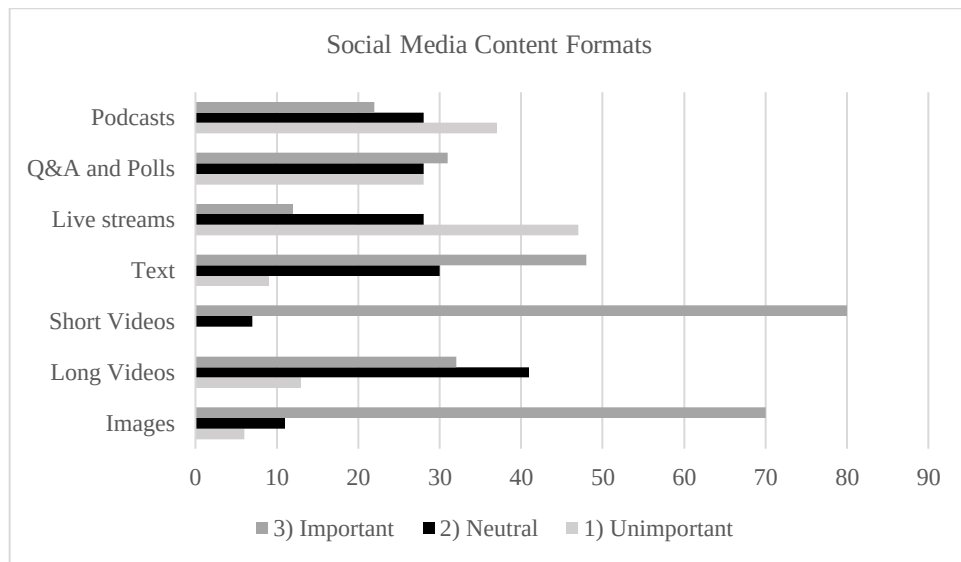
Q8: Are there any specific Portuguese influencers that you trust for skincare products recommendations?



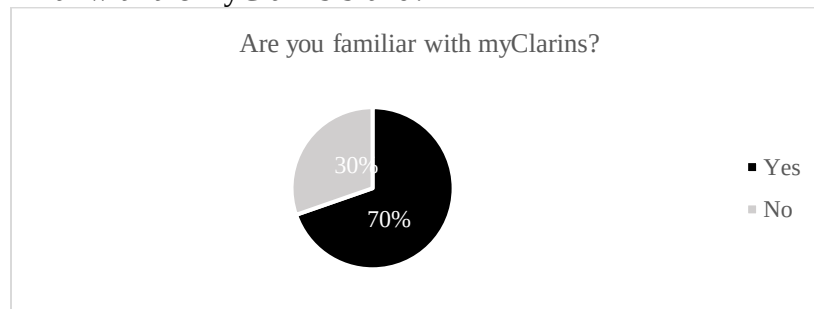
Q9: To what extent are these types of social media content relevant to you regarding skincare brands?



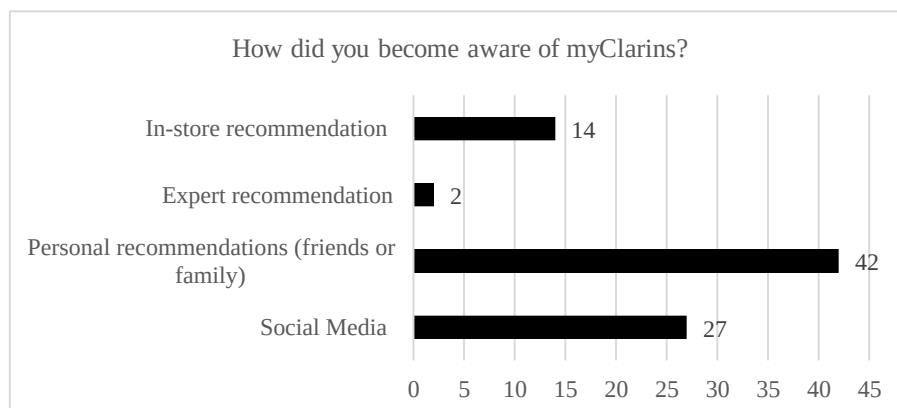
Q10: Please rate the importance of each of the following social media content formats for you:



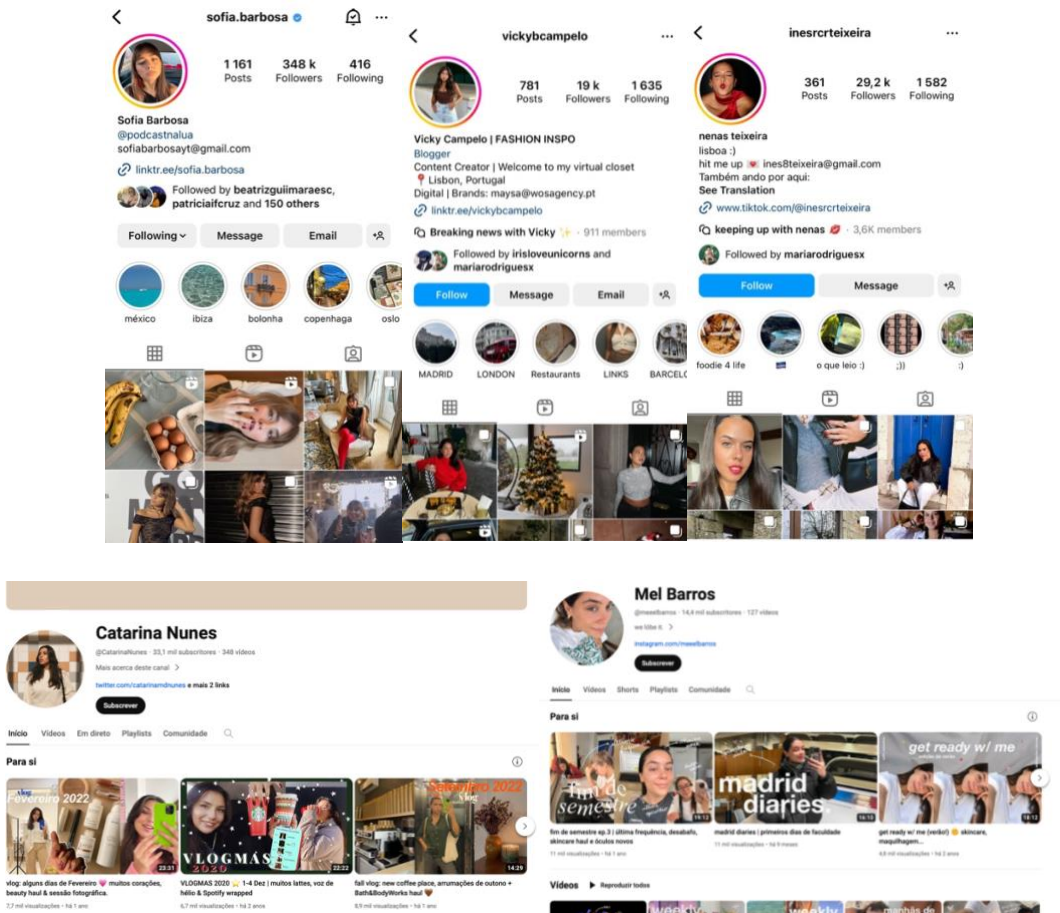
Q11: Are you familiar with the myClarins brand?



Q12: How did you become aware of the myClarins brand?

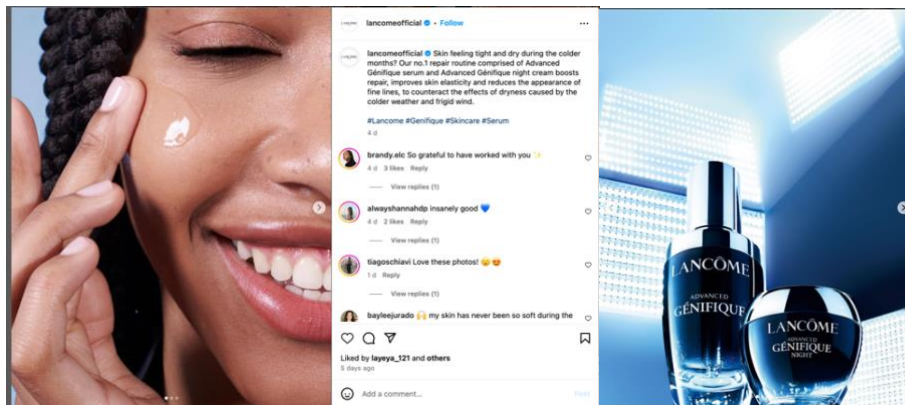


Appendix 17) Instagram Account of Influencers, Sofia Barbosa, Vicky Campelo, Inês Teixeira, Catarina Nunes e Mel Barros (Instagram and Youtube platforms)



Source: Influencers Social Media

Appendix 18) Example of a Social Media post by Lancôme showcasing the before and after application



Source: Lancôme Social Media