



Work Project, presented as part of the requirements for the Award of a Master Degree in Management from the NOVA School of Business and Economics.

**How is the makeup market in Tunisia changing?  
Recommendations to the main market players on how to grow  
and improve the costumers' online experience.**

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**Abstract:**

The present Work Project addresses the following question: How is the makeup market in Tunisia changing? We approached this challenge by conducting a primary and secondary research. Insights are organized in two sequential parts : first, the analysis from different perspectives of the changes in the Tunisian makeup industry and the drivers of these changes ; second, recommendations to the makeup brands, distributors and retailers operating in the market on how to grow and improve the costumers' online experience. The main recommendations involve a new strategy for the luxury and premium brands.

Key words : Makeup market, Tunisia, Social Media, Digital Influencers.

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## **I. Introduction:**

The global makeup market is booming across both the developed and developing Worlds. Currently, this market is mainly concentrated in North America and Europe (FMI: Future market Insight, 2016). In Tunisia, the recent political, economic, sociological and digital changes have strongly impacted the relationship of women with beauty and therefore makeup. This evolution makes the Tunisian makeup market an interesting case study.

In this Work Project, we first study the historical background, the evolution of the beauty culture, the digital landscape and the makeup market in Tunisia (Part II). We then present the insights of our marketing research aiming to explore how the makeup market is changing, what are the drivers of this evolution and what role social media plays in this (Part III). We subsequently leverage on the insights from both parts to develop recommendations to the market players on how to grow and improve the customers' online experience.

## **II. Background:**

### **A. Contextual insights on the society, the beauty culture and social media in Tunisia**

#### **1. What is Tunisia today?**

**Early History:** The original inhabitants of Tunisia are Berber tribes. Throughout the centuries, several other civilizations, such as Phoenicians, Romans and Turkish settled down and shaped the history of the country. In the Year 670, Arabs entered Tunisia, bringing Islam to North Africa. Different Arab and Muslim dynasties ruled Tunisia ever since (Guellouz et al., 1983; Nabli & Swiderska, 2008).

**Contemporary History until 1987:** The French colonization, from 1891 to 1956, had a major impact on Tunisia's culture. Since the independence, important reforms were introduced to the Constitution (Abassi, 2005; Bouhdiba, 1978). These reforms were made for a break with traditional society and a move towards a modern, mostly French, inspired model (Abassi, 2005). Bilingualism (Standard Arabic/French) was also adopted and advocated by

President Habib Bourguiba just after independence. The French language was considered a driver of modernization, rationalism and science (Abassi, 2005; Messadi, 1958). The exposure to European media also enhanced the knowledge of European languages and cultures. Islam remained the official state religion, but the power of religious leaders was largely reduced (Abassi, 2005). However, advocates of « Arabization » continued to act dynamically to defend their cause (Bouhdiba, 1978).

**The Ben Ali Era – 1987 to 2011:** Former President Zine el Abidine Ben Ali took power in 1987. Under his presidency, the « Arabization » movement accelerated. French use declined for the overall population and became mostly reserved for the intellectual and cultural elite. This effect was enhanced by the increasing exposure to Middle Eastern satellite TV. In parallel, and since the mid-1990s, a wave of conservatism and religious fervor occurred at many levels of the society. The fact that tourism became the pillar for Tunisia's economy escalated the social division. Tourism favored only a few regions and people in the country and left others behind (Lalieu & Hassan, Investig'Action, 2011). In order to prevent popular revolts under such conditions, Ben Ali put a strong repressive police system. Moreover, to further control its citizens, the government controlled internet browsing, censored Youtube and several information sources, and closely monitored any politics related content on social media. Indeed after years of repression, Tunisians no longer wanted to continue to live under such conditions. As the ruling class was disconnected from the people, when the popular revolts broke out in December 2010, the government decided to repress in violence. But in the face of the determination of the people, the repression reached its limit. « It is one of the success keys of the Tunisian revolution: it reached all segments of society, including members of the army and the police who have sympathized with the protesters » (Lalieu & Hassan, Investig'Action 2011).

**Tunisia Post revolution :** On the 14th of January 2011, former president Ben Ali fled the country following the pressure from the popular uprising. This day was an important day in the Arab World history as it marked the Tunisian revolution day and the start of the « Arab spring<sup>1</sup> ». Yet, it made the situation more unstable as the revolution unveiled a heterogeneous society. In the first few years after January 2011, there were constant manifestations, coupled with few terrorist attacks that affected different regions and sectors of the country. Internationally, tunisians' image changed from being « free and pioneering revolutionaries » to the image of « retrograde and dangerous islamists » (Pouessel, 2013, p.1).

Six years after the revolution, Tunisia is still struggling to find a balance and establish a modern democracy. The situation stabilized with the increase of security, especially with the building of a massive protection wall on the borders with Libya in 2016 and tightened security in the mountain borders with Algeria (Amara & Markey, 2016). Such security measures are not only fighting terrorism, but they are also trying to fight the illegal smuggling of counter-fit products, which increased dramatically since the revolution. Consequently, the economy is stabilizing and investors are coming back.

## **2. Beauty culture in Tunisia:**

Struggle over identity is a central issue in such a complex and ambivalent environment. *Fathia Saidi*, a sociologist, said in one of the episodes of *Tunisian stories* (TV talk show): « In the Tunisian society, the concept of individualism is almost absent in our upbringing. Usually, we only talk about collectivism<sup>2</sup> ». Identity is indeed related to the self but it also operates within the social environment. Researchers suggest that fashion plays a major role in shaping and defining one's identity. Solomon and Rabolt (2009) describe

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<sup>1</sup> Arab Spring: A wave of pro-democracy protests and uprisings that took place in the Middle East and North Africa beginning in 2010 and 2011 (Source: Encyclopædia Britannica, 2017)

<sup>2</sup> Collectivism is a type of social organization in which the individual is seen as being subordinate to a social collectivity such as a state, a nation, a race, or a social class. Collectivism may be contrasted with individualism, in which the rights and interests of the individual are emphasized. (Source: Encyclopædia Britannica, 1998)

fashion as a «driving force that shapes the way we live: it influences our apparel, hairstyles, art, food, cosmetics, ... and many other aspects of our daily lives ».

Tunisian women's relationship with makeup dates to centuries. Traditionally, Tunisian women applied an eye pencil, called kohl, which was home made from natural ingredients. They also used a natural plant called « Al Miswak » that is prominently featured in Islamic hygiene jurisprudence. This plant is mainly used for teeth whitening; but due to its components, it gives the lips a natural pink color and therefore serves as a subtle lipstick color. With modernization and the increasing exposure to other cultures, Tunisian women's relationship with makeup got more sophisticated. A widely used product called «the magical stick» emerged into the beauty culture during the 80's (Marie Claire, 2015). This product is a long-lasting lipstick that has a green color but instantly turns into a bright pink once applied. Up until the early 80's, most women's daily routine make-up was the black eye pencil (Kohl) and lipstick. Heavy make-up tended to only be used during important social events such as weddings.

International media exerts a profound influence over Tunisians in their late teens, twenties and thirties. As Internet is no longer censored, Tunisian women started to follow more closely international fashion trends over social media and online magazines. Thus, international celebrities and influencers' styles are inspiring them more. While older Tunisians keep their more traditional ideals, millennials, tend to have a wider range of attitudes towards beauty (Euromonitor, 2014). The latter exposure to Middle Eastern media, especially to Lebanese and Egyptian celebrities, and the increasing openness towards plastic surgery in the region, played a major role in influencing Tunisian women's styles, beauty and makeup culture.

In light with these liberal attitudes, there is a strong demand for cosmetics and personal care products. *Maher Mestiri*, the inventory and procurement manager of a retail

makeup stores' chain *Féerie* said that « Many industries have suffered somehow from the economic downturn caused by the revolution, except makeup. No matter what the situation is, or how unstable it is, Tunisian women do not seem to be able to live without makeup » (Author interview, 2017). One of the factors that contributed to this heavy consumption is the increasing number of working women. According to *the Tunisian National Institute of Statistics*, in 2014, women constitute 32% of the total Tunisian workforce, increasing +7% each year, with 80% of this workforce aged 18-40. Given their lifestyle, these consumers are looking for multifunctional products. They also continue to actively test new products and are willing to invest in more sophisticated color cosmetics. But the purchase power among consumers decreased; thus manufacturers are more commonly carrying out promotions. Low-income groups are highly price sensitive, especially among working women. Many consumers seek value products and therefore fuel demand for mass market products (Euromonitor, 2014).

### **3. Social media in Tunisia and increasing role of digital influencers**

#### **a. Digital landscape and behavior over the Internet:**

Tunisian millennials are increasingly tech-savvy and highly connected over the Internet. According to *Internet World Stats*, up to June 2016 there were 5,800,000 Internet users in Tunisia, representing more than 50% of the total population. The statistics also show that the number of Facebook subscribers is exactly the same as Internet users. This shows how the Tunisian population is highly connected to social media, especially to Facebook. The mobile market is extremely dynamic with mobile phone devices being the primary access to Internet for many consumers. *Arab social media report*, a study prepared by TNS<sup>3</sup> across several Arab countries, confirms those statistics and shows that Smartphones are the main access mode to social media platforms. In line with these findings, the study shows that social

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<sup>3</sup> TNS is a global market research company (Source: TNS global.)

media users in the Arab World have a lifestyle that revolves around the use of technology and social media with constant update checking and content posting. The respondents describe social media as a « life enhancer » and «magic wand » that is bringing them closer to the World and make their life more exciting (TNS, Arab social media report, p. 21, 2015).

However, Tunisian Internet users do not use e-commerce: First, because they do not trust online payment; and second, because most of the time they do not have the option to. According to the statistics from the *Ministry of Information Technology and Communication*, in 2013 there was 5 million internet users in Tunisia, while there was only 560 000 online purchase transactions over that same year. The government is attempting to shift consumers' attitudes towards alternative means of payment by introducing a CTI card<sup>4</sup> to the financial system. Nonetheless, while not yet buying a significant number of products via the internet, young Tunisians are going online to conduct price and product research during the decision making process. Millennial consumers are also increasingly engaging with manufacturers and retailers via social networking sites. Thus, Facebook and Instagram are being used to introduce products, highlight promotions and special events and provide marketing information.

#### **b. The rise of Bloggers, Vloggers and digital influencers:**

Social media is a platform for many of the Arab youth to express their point of view and creativity (Arab Social Media Report, p.57, 2015). From that stand came the age of Bloggers<sup>5</sup>, Vloggers<sup>6</sup> and other digital influencers<sup>7</sup>. The most prominent example is Huda Kattan, best known as *Huda Beauty*, born and raised in the US by Iraqi parents and currently

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<sup>4</sup> CTI credit card that provides a foreign currency quota for international payments, e-commerce and online advertisement.

<sup>5</sup> Blogger: A person who keeps a blog – A blog is an online diary where you can express yourself and share your ideas. (Source: Wikipedia. (n.d.). Blog. Retrieved April 4, 2017)

<sup>6</sup> Vlogger (short for Video Blogger): A person who keeps a video blog or more commonly a Youtube Channel. (Source: Wikipedia. (n.d.). Video blog. Retrieved April 4, 2017)

<sup>7</sup> Digital Influencer: An influencer is a third party who significantly shapes the customer's purchasing decision (Brown & Hayes, 2008) and has a greater than average reach or impact... in a relevant marketplace (Word of Mouth Marketing Association Handbook). (Source: Social@Ogilvy. (2014, June 4). Who is an influencer?)

based in Dubai. Huda is one of the World's most famous digital influencers in the beauty World with 19.9 million followers on Instagram and is an international award winning makeup artist. She started her blog in 2010, which quickly became a community for beauty connoisseurs (Hudabeauty, 2017). Huda Beauty eventually created her own makeup brand and launched several products in the last 2 years.

The social media influencers' trend is also developing in Tunisia. But the landscape is quite different from other regions in the World. The line between Bloggers, Vloggers and other digital influencers is blurry in this country. Tunisian digital influencers rely mostly on Instagram and Facebook as the main communication tools with their followers, since these platforms can attract more web traffic<sup>8</sup> to their personal blogs, websites or Youtube channels. In Tunisia, digital influencers use blogs, Vlogs and websites as professional tools to communicate messages or provide information on a certain topic. While, they use Instagram as a platform to announce when they write blog posts or upload Youtube videos. It also serves as a tool to keep a more constant feed and better engage their followers, since it is easier to create content for Instagram and to post more frequently. Meanwhile, they mainly use Facebook to repost the same content of Instagram, as Facebook allows them to reach more people. Tunisian influencers also rely heavily on Snapchat<sup>9</sup> for its usage convenience. It makes it easier to give their opinions and tips and to share their daily-life routine and the events they partake in. It also represents a more convenient tool for followers in Tunisia to get insights about what news social influencers have without having to scroll down a long feed on Instagram or Facebook and without having to read lengthy blog articles. Snapchat changed the way people interact with each other online. The most remarkable attributes of

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<sup>8</sup> web traffic: is the amount of data sent and received by visitors to a web site. Sites monitor their web traffic to see which parts or pages of their site are popular and if there are any apparent trends, such as one specific page being viewed mostly by people in a particular country. (Source: Wikipedia. (n.d.). Web traffic. Retrieved April 4, 2017)

<sup>9</sup> Snapchat: is both a messaging platform and a social network. Users can interact with their followers by privately sending photos and short videos up to 10 seconds long or posting them on your "Story" feed. (Source: Moreau, E. (2017, January 10). What Is Snapchat? An Intro to the Popular Ephemeral App.)

Snapchat are: privately sent photos and videos disappear a few seconds after they've been viewed by their recipients; story feeds disappear within 24 hours; and the application notifies its users when any of their followers saves or screenshots their story posts or messages. Snapchat's disappearing content makes online interaction feel more human and more grounded in the present moment (Moreau, Lifewire, 2017). As the digital influencers trend is still relatively new, brands and companies in Tunisia rely more on the number of followers, rather than relevance, as a decision parameter to choose which influencers to work with. This explains why the number of specialized digital influencers is low. Due to the nature of the market, beauty, fashion, travel, food and other digital influencers have to work with many industries simultaneously to attract a larger followers' base and to have more collaboration opportunities (for example some digital influencers combine makeup, fashion and lifestyle together; or some travel Bloggers collaborate with makeup and fashion brands in order to have a wider variety of social media contents to post). Appendix 1 displays a table with social media statistics of the most prominent beauty and fashion digital influencers in Tunisia and Appendix 2 provides further information about these digital influencers.

## **B. Makeup market in Tunisia**

### **1. Market overview:**

In 2015, the color cosmetics market in Tunisia registered a strong growth of 8% in current value terms to sales of around 40 Million Euros (Euromonitor, 2016). The Tunisian revolution presented an opportunity for foreign and domestic investments. The market benefited from a rise in direct selling points that further enhanced purchases in makeup (Euromonitor, 2016). Many laws on foreign investments were altered which enabled several companies specialized in beauty and personal care to establish franchises and develop distribution agreements. On the other hand, due to borders security issues after the 2011 revolution, lack of laws to control the counter-fit sales and cash-strapped consumers, the black market is growing fast in Tunisia (Euromonitor, 2016). The *World Bank* recently

estimated the value of the total illegal goods market in Tunisia at around 1 billion Euros. Many cosmetic products are illegally imported and sold at half the price in public places, thus hampering legitimate sales in perfumeries and cosmetics shops. But, the government is also putting more control over distributors and retailers, especially the small perfumeries, to fight the illegal imports phenomena.

## 2. Distribution Channels and Brands in Tunisia:

Makeup brands are distributed through 3 channels :

- Selective Retailers (e.g. : perfumeries): This channel is more suitable for luxury and premium brands<sup>10</sup> as it helps the manufacturer gain more control. It is also suitable for middle market<sup>11</sup> brands. In Tunisia the most important selective retailers are : *Marionnaud, Fatales, Pretty Woman and Féerie*.

- Drugstore Retailers: This channel is more for middle and mass market brands<sup>12</sup>. Examples of drugstore makeup retailers are *Boots* in the United Kingdom, *DM* in Germany and *Wells* in Portugal. In Tunisia, the most prominent example is « *Kisses* » which is a multi-brand makeup distribution chain that sells only middle and mass market brands. Parapharmacies that sell makeup products and traditional small perfumeries are also part of the drugstore distribution channel.

-Mass market distribution channel : super market and hyper market distribution for mass market brands. Examples in Tunisia are Carrefour and Monoprix.

The following table provides an overview of the most prominent brands sold in Tunisia by each type of channel.

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<sup>10</sup> Luxury & Premium brands: Luxury brands have several definitions. According to Jean Noel Kapferer, from his approach to luxury as the creator's light, luxury brands do not respond to the market needs but rather express the creator's artistic inventiveness. While, premium brands build their business models based on comparison with other brands and develop their products and services according to the customers needs. In the makeup and accessories range, luxury and premium brands overlap.

<sup>11</sup> middle market brands: used to describe a product or service that is neither very cheap nor very expensive when compared to other products or services of the same type (Cambridge dictionary (Cambridge Dictionary, n.d.)

<sup>12</sup> mass market brands: these brands respond to the market needs and are intended to be bought by as many people as possible (Cambridge Dictionary, n.d.)

**Table 1 : Distribution Channels/Most Prominent brands in Tunisia**

Selective Retailers		Drugstore Retailers		Mass market Retailers	
Multi-brand stores	Mono-brand stores	Multi-brand stores	Mono-brand stores	Multi-brand stores	Mono-brand stores
Chanel Estée Lauder Lancôme Catrice* Bourjois*	Makeup For Ever MAC cosmetics	Élégant Bourjois* Lovely Catrice* Essence*	Glossip Fashion makeup ELF	Lella* Maybelline* Rimmel* Kolsi*	Non Applicable

Source : Thesis author

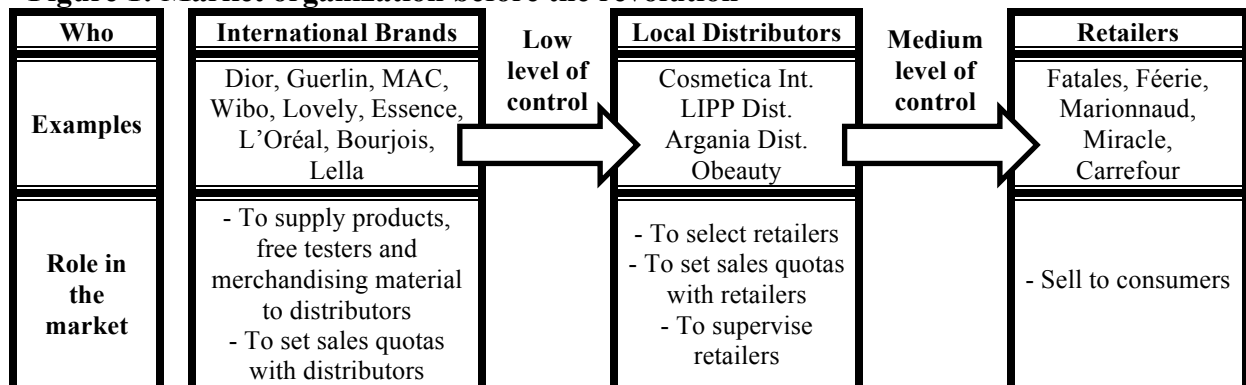
\* Note : Some middle and mass market brands are available through different distribution channels.

### 3. Market organization :

The Tunisian makeup market is not organized as in Europe or USA. Most international brands do not have representative offices in the country. They mainly have partnerships with large Tunisian makeup distribution companies like *Cosmetica International*, *LIPP distribution* and *Obeauty*. Some of these distributors are at the same time retailers (for example *Argania Distribution* owns the retail stores chain *Fatales*). Some others are at the same time makeup producers (for example *Cosmetica International* manufactures its own brand *Lella*). Though, the market organization has been changing in the last few years.

Before the revolution (see Figure 1), international brands did not have much control in the market; they were only setting sales objectives and supplying the products to their official representative distributors. Those distributors were controlling the distribution channels and the retailers. They were setting the sales objectives with the retailers, supervising and then reporting the sales statistics to the brands. They were also working with retailers to organize sales and promotion strategies.

**Figure 1: Market organization before the revolution**



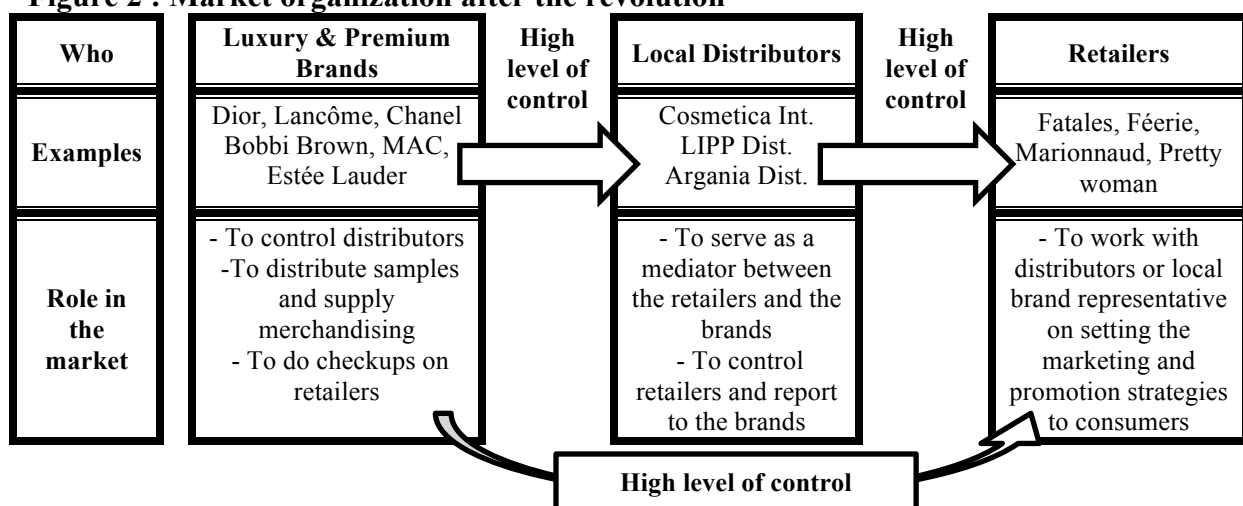
Source: Thesis author based on literature review and interviews.

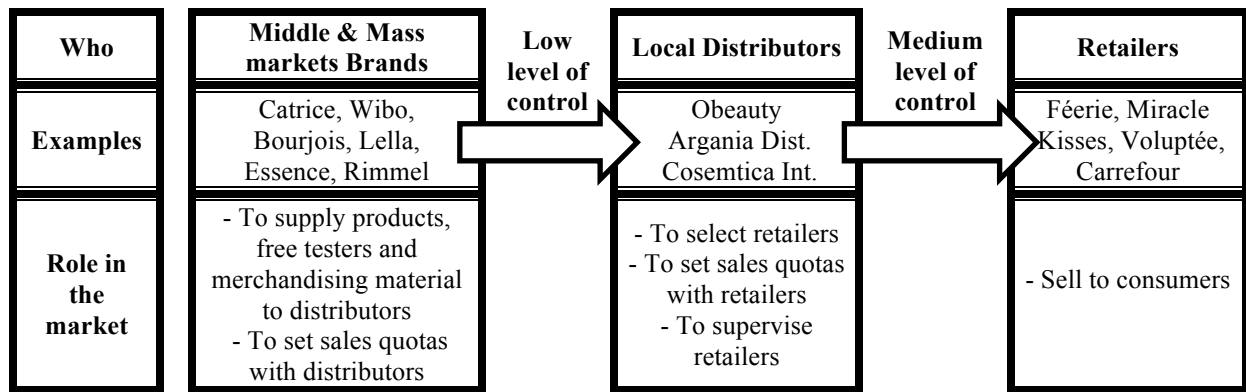
After the revolution, the distribution partnerships that were already in place remained; yet international luxury and premium brands now impose direct control and stricter requirements on Tunisian distribution channels. Distributors no longer have the freedom to select retailers on their own. They have to report detailed information to the brands about their distribution channels. Most international luxury and premium brands also assign one of their distributors' employees to work as their local brand manager or as representative to ensure further control. International luxury and premium brands also do random check ups on retailers to check the stores' layout and cleanness and to measure the quality of the service offered. They also took control over the training of the beauty counselors. Nowadays, distributors have to ensure a team of beauty experts for each brand they represent in Tunisia and allocate them throughout the stores they supply to.

On the other hand, the middle and mass market brands have been expanding exponentially. The makeup market in Tunisia currently offers a wide variety of international middle and mass market brands imported from several countries, like the brands *Catrice*, *Artdeco*, *Essence* and *Wibo*. Contrary to international luxury and premium brands, middle and mass market brands still give total control in the market to their representative distributors.

Figure 2 resumes the contrasting level of control and role in the market of each type of brands.

**Figure 2 : Market organization after the revolution**





Source: Thesis author based on literature review and interviews.

### III. Addressing the Work Project challenge:

#### 1- Research context and objectives:

We conducted a market research in order to address the following questions: How is the makeup market in Tunisia changing? What are the main drivers of this evolution and what role do social media play in this. Based on the contextual analysis of the society, the beauty culture, social media and the makeup market in Tunisia today (Part II of this Work Project), we propose the following hypotheses:

The makeup market changed tremendously since the revolution; in particular:

H1: Luxury and premium brands exert more control on distributors and retailers

H2: Retailers, distributors and brands are expanding their distribution channels offline & online

H3: Retailers, distributors and brands are investing in digital marketing strategies

H4: The middle and mass markets are expanding vs. the luxury and premium markets

H5: Social media and digital influencers impact consumers' brands preference

H6: Social media and digital influencers are changing the consumers' makeup knowledge and brands awareness

H7: The makeup digital influencers sphere is evolving

These hypotheses shaped the research organization and methodology.

## 2- Research Methodology:

### a. Data Collection methods and forms:

Our research involves secondary and primary data collection and analysis. The primary research focuses on open-ended semi-structured in-depth interviews and observations of social media platforms. The secondary research focuses on the analysis of the literature and other sources such as news articles about the market in Tunisia. The following table provides detailed information about the primary and secondary sources:

**Table 2: Data Inventory**

Data Type	Methods	Quantity
Primary	Open-ended semi- structured in-depth interviews + Author's notes on interviews	29 interviews
	Author's observation of makeup consumer's behavior and digital influencers on social media platforms	More than 100 observations of blogs, websites and Facebook, Instagram and Snapchat accounts
Secondary	Data related to the brands and the makeup market in Tunisia	±25 articles, reports, research papers...
	Data related to the makeup influencers	±10 articles and interviews
	Data related to makeup consumers' behaviors	±10 articles, reports, research papers books...

### b. In-depth interviews sample:

The sample is divided in 3 subgroups:

- Group 1: Industry managers (Distributors, retailers, marketing directors,...): 3 Interviews.
- Group 3: Makeup digital influencers: 5 Interviews.
- Group 2: Makeup Consumers

The millennial generation is different from previous generations. They were born in a time of rapid change and digital revolution that gave them a different set of priorities and expectations (Garber, 2016). According to the *National Institute of Statistics* in Tunisia, people aged 15 to 34 represent around 34% of the total population (2016). For these reasons, our sample of consumers is composed by 100% of young women aged between 15 and 34 and who have used makeup at least once in the last week.

=> 6 Interviews of consumers aged 15 to 19.      => 6 Interviews of consumers aged 20 to 24.

=> 5 Interviews of consumers aged 25 to 29.      => 4 Interviews of consumers aged 30 to 34.

c. Data Collection tools:

Table 3 presents the process used to convert the hypotheses into interview guide topics. The detailed interview guides resulting from this process are presented in appendix 3.

Table 3: From theoretical framework to interview guides topics			
Theoretical Framework	Interview guides topics		
	Topics for industry managers	Topics for digital influencers	Topics for consumers
To gain understanding of how is the makeup market in Tunisia changing, what are the drivers of these changes and what impact does social media have on the market based on hypotheses H1 to H7 presented in page 12.	<p><b>Makeup market changes:</b> How was the demand for makeup and the consumption patterns over the last few years? How did their relationship with suppliers and/or international brands change in the last few years? What are the main drivers of the market changes?</p> <p><b>Role of social media:</b> Which social media platforms have their integrated in their marketing strategies? How important do they think social media impact is?</p> <p><b>Role of digital influencers:</b> Ask if they have worked before with digital influencers and to describe the overall experience and how it was initiated and organized. Have they integrated digital influencer in their marketing strategies? How</p>	<p><b>Personal Story and style changes:</b> When and why did they start blogging/ Vlogging? How did their personal style as digital influencer change overtime? What were the drivers of this change? <b>Social media and makeup consumers:</b> What is their favorite social media platform and why? How did the relationship with their followers change overtime? And what were the drivers of the change?</p> <p><b>Makeup market changes:</b> How did their relationship with brands, retailers and distributors change overtime? Ask them to describe how were the first interactions with brands and the first events they attended vs. in current situation. What do they think of brands' presence on social media</p>	<p><b>Makeup usage, brands and channel preference:</b> Ask about their daily makeup routine and products preference. What are their favorite point of sale and why?</p> <p><b>Social media and digital influencers:</b> What are their main sources of information regarding makeup? Do they follow any Tunisian digital influencers? If yes, who? Why? How frequently? If no, Why not? Do they follow any international digital influencers? Who? Why?</p> <p><b>Makeup market knowledge:</b> Do they follow any international makeup trends or brands that are not available in Tunisia? Do</p>

### 3- Market research insights:

The research allowed to confirm our hypotheses:

- **The makeup market changed tremendously since the revolution**, In particular:

#### **H1: Luxury and premium brands exert more control on distributors and retailers**

The changes in the market organization explained in the literature review and the industry managers' interviews, exemplified through the following quotes, confirm this hypothesis:

*« This strict control system started around 2 years ago; Luxury international brands now control every aspect related to their brands in Tunisia and put more pressure on their representative distributors and on us, retailers...In my opinion this change in our relationship with brands, especially luxury and premium brands, is due to many factors. The first is the decrease of purchase power that consequently decreased the sales of luxury products. The second reason...the makeup market in Tunisia wasn't as big as it is now...Now that the market is growing larger...they want to impose stricter control rules to keep up with their international brand image ». (Marketing manager, Féerie, selective retail chain)*

*« International luxury brands and their distributors became more demanding. They also became more reluctant and meticulous because they want to keep up their old standing in the market. The sales objectives they set for us, as retailers, are much more demanding especially in the last 3 years ». (Owner of Voluptée, small perfumerie/ drugstore retailer)*

#### **H2: Retailers, distributors and brands are expanding their distribution channels online and offline**

This expansion takes several forms:

- Mono-brand stores: After the revolution, international brands and their representative distributors have been expanding their distribution channels through mono-brand stores. This form of expansion especially boosted in late 2016 and early 2017. In less than 6 months, three new mono-brand stores were established: *Glossip Milano*, a middle market brand, was introduced to the Tunisian makeup market with 2 mono-brand stores openings consecutively in October 2016 and February 2017 (Samir, 2016; Tunivisions, 2017). The professional premium makeup brand, *Makeup Forever*, also opened in February 2017 a beauty center that has: their second *PRO Makeup Forever* store for professionals and makeup artists; a public store for all customers, a makeup library with a collection of print and digital books and

publications about cosmetics; and a makeup academy that offers both professional makeup trainings and specialized workshops for customers (Bach Hamba, 2017)

- E-commerce: The singer and beauty and fashion digital influencer *Manel Amara*, acquired a franchising license of a French middle market makeup brand, *Fashion Makeup*, and became their exclusive representative and brand ambassador in Tunisia. The products are solely sold through their Facebook fan page. More and more makeup retailers and distributors are also offering e-commerce services and delivery advantages. There are also independent e-commerce websites dedicated for make up, the best two examples are *Cosmeto.tn* and *AKA-Cosmetics* (Adhoum, 2017). In fact, the *Ministry of Finance* in Tunisia confirmed that the number of people acquiring online payment cards increased from 34842 cards to 49022 in 2016. The *Ministry of commerce* also declared that online payments in 2016 accounted for around 68 million tunisian dinars (around 27 million euros) compared to 52 million Tunisian dinars (around 20 million euros) in 2015 (Deghilage, 2017).

### **H3: Retailers, distributors and brands are investing in digital marketing strategies**

Although this change is slow paced, makeup distributors and retailers in Tunisia are starting to embrace digital marketing strategies. *Obeauty*, the makeup distributor, was among the first to rely on social media as a marketing tool and to embrace the culture of digital influencers. *Ouns besrou*, *Obeauty*'s marketing director explained in the interview the importance of social media and digital influencers for their company. She mentioned how they try to innovate and be more creative with the content they publish on their social media accounts and their blog *Obeauty story*. She also talked about how they frequently collaborate with digital influencers, send them gifts to test out new makeup products and invite them to public relations events and workshops (Author's interview, 2017). As a matter of fact, 4 out of the 5 interviewed beauty influencers said that the first makeup collaboration they had was

with the distributor *Obeauty*. *Narjess Mizouni*, beauty and fashion digital influencer known as *Jess*, talked about her story with *Obeauty*:

*« I contacted them a few years ago with the idea of creating a blog for the brand... “Artdeco”. They liked the idea but they suggested creating instead a blog for all their brands and that’s how the blog “Obeauty story” was created... I also created their Instagram account and used to manage both the blog and the Instagram account up until a few months ago. This was one my highest paying collaborations and jobs I did as a Blogger.»*

On the other hand, some distributors and retailers are late adopters of the digital age. *Sondes M’farej*, owner of *Voluptée* confessed:

*« Personally I feel guilty of being resistant to change. I only realized the importance of social media and the depth of its impact recently...Social media surely helps a lot in promoting products and brands ».*

All the interviewed industry managers talked about their plans of rebuilding their digital strategies and increasing their online presence. It is noticeable through the Internet and social media platforms from the example of the local brand *ELEGANT*. The brand *ELEGANT* has been distributed by *Nihel Laboratories* in Tunisia for years and since 2013, they have also acquired a local production license from the brand. *Rym Khouja*, a makeup Vlogger and influencer, explained:

*« Nihel, the owner of ELEGANT in Tunisia... first included some influencers, like myself, in the product development process. During the development of the lipstick formula, Nihel was sending us product prototypes... During the pre-launch period, we –makeup digital influencers- were all communicating about the product. Nihel was also constantly communicating about it herself all over Facebook groups and influencers’ fan pages until it created a huge buzz. The day of its launch the product sold out in hours. Retailers... couldn’t satisfy the market need... people were signing up for waiting lists in order to get the color reference they liked and that influencers recommended on their social media platforms ».*

Online news outlets like *Jet Set Magazine* and *Femmes de Tunisie* also wrote about this product launch. When asked about what they think of local brands online presence, most consumers also mentioned the brand *ELEGANT* and the liquid matt lipstick launch campaign. (Appendix 4 displays social media content about *ELEGANT*). Most interviewed consumers admitted they didn’t use to pay any attention to the brand until the recent campaign. Some consumers even confessed going to several retailers to get all the color references they were

looking for and signing up in waiting lists to get the product. *Mouna*, a 25 years-old Dental medicine student, disclosed:

« ...*Elegant...is serious about its digital marketing strategy. When they launched their liquid matt lipstick ... That created a huge buzz and made everybody so eager to buy the product that it kept on selling out every time the stores get a new stock for nearly 6 weeks after the launch. I personally signed up on a waiting list...I only got the color references I was looking for after 2 weeks of waiting* ».

The success of that campaign was a wakeup call for several other local brands. Indeed, in February 2017, the local brand *Lella* reached out to the digital influencer *Narjess Mizouni*, who recently established a digital content creation and digital influencers management agency. *Narjess's* agency is currently managing the social media accounts and digital content creation of the brand *Lella*. Up until this, the brand had minimal online presence on Facebook (Author's interview; Instagram observation, 2017). *Féerie*, the selective retail chain, didn't have a marketing department up until 3 years ago admits *Randa Meftah*, their marketing manager. Currently, they are present on Facebook, Instagram, Pinterest and Twitter. Their followers on Facebook increased from 7000 to more than a 150000 in less than 3 years. The marketing manager also talked about how they are currently working with a digital marketing agency to plan a strategy for sponsoring their social media content. Moreover, she explained how she's planning ahead for the content of their future Snapchat account with some beauty digital influencers and makeup artists; her idea is that every few days a new digital influencer would take over their Snapchat account and live broadcast to all their followers their makeup routine or a beauty related tutorial (Author's interview, 2017).

#### **H4: The middle and mass markets are expanding vs. the luxury and premium markets**

The interviewed industry managers confirmed this hypothesis. They all mentioned that, since the revolution, the middle and mass market brands are expanding while the luxury and premium brands' market is decreasing significantly and consumers are more inclined towards middle and mass market brands. The following industry managers' quotes exemplify

this trend:

« *Due to the current reality of the market, we are shifting our focus to middle market brands... Before the revolution, we didn't have a large variety of brands. We mostly had luxury brands, a few local brands and a few mass market brands like L'oréal, Bourjois and Maxfactor. Thus we had a larger demand for luxury brands. Plus the purchase power was higher than it is now. Consumers are thus becoming more inclined towards middle and mass market...Digital influencers have a great impact on this as well* ». (Marketing manager, Féerie, selective retail chain)

« *Middle and mass market brands noticeably improved their quality and invested a lot in product innovation and diversity in the last few years... Consumers demand more middle and mass market brands... because those brands are now developing duplicates of luxury and premium products* ». (Owner of Voluptée, drugstore retailer)

Indeed, all the interviewed consumers confirmed using middle and mass market brands; more heavily consumers aged 15 to 25. Some consumers, especially aged 25 to 35 alternate between luxury and mass market brands depending on product preference and their skin type needs. Some others explained that they use middle and mass market brands for everyday routine makeup and more luxurious brands for special occasions and night makeup looks. The following quotes exemplify how consumers are more inclined towards middle and mass market brands:

« *My favorite brands are Wibo, Lovely and Essence. These brands have duplicates of most luxury products with a good quality and an even better price* ». (Sara, 18 years-old)

« *I have a mix of all range of brands. I use luxury brands for nights and for special occasions...For everyday day makeup I use middle and mass market brands like Bourjois, L'oreal, Maybelline, Lovely, Artdeco and Essence*». (Ines, 30 years-old)

##### **H5: Social media and digital influencers impact consumers' brands preference**

As illustrated above social media and mainly digital influencers have a big impact on consumers' brands preference and consequently on the market shift towards middle and mass market brands. The brands that were repeatedly mentioned across consumers' interviews are *Catrice, Artdeco, Essence* and *Lovely*; which are all middle and mass market brands. Through observation of different social media platforms of makeup digital influencers in Tunisia, we could notice how these brands are heavily mentioned and used for makeup tutorials on Youtube and Snapchat (See appendix 5 for examples). The interviewed industry managers also confirmed the role digital influencers have on impacting consumers brands preference

and their lean towards these middle and mass market brands. *Ouns Besrou*, marketing director at *Obeauty* (distributor) and *Randa Meftah*, marketing manager at *Féerie* (selective retailer chain) said consecutively:

*« Most digital influencers generate their content around middle and mass market brands. They also contributed to promoting several up-and-coming brands that didn't exist in the market before such as: Artdeco, Lovely, Catrice and Essence »;*

*« Digital influencers...are mostly collaborating and promoting middle market brands. As they have a big influence especially on millennials they created a paradigm shift in the market. They have less influence though on 30 year old women and older. The older consumers have already established their brands' preference through years of trial and experimenting ».*

#### **H6 : Social media and digital influencers are changing the consumers' makeup knowledge and brands awareness**

All the interviewed consumers, across all age groups, mentioned social media and makeup digital influencers when asked about their sources of information and inspiration regarding makeup. Consumers in Tunisia indeed rely heavily on social media to get information about makeup brands, products, trends and makeup application techniques, as the following consumers' quotes exemplify:

*«I rigorously follow beauty Bloggers on Facebook, Instagram, Youtube and Snapchat. I follow so many makeup influencers that I can't count. They are my source of inspiration and information for every product that I use or think to buy ».* (Salma, 24 years-old)

*« I think I have watched every makeup tutorial available on Youtube and Instagram... But as they usually don't provide information on their prices or where they are sold, I look for this information on the Internet and on Facebook ».* (Nada, 25 years-old)

Consumers also confirmed that they follow several beauty influencers from around the World. Although there isn't enough data to determine the consumers following pattern of digital influencers, we can conclude from the interviews that most consumers follow both Tunisian and international makeup influencers. Most followed international influencers are either from French speaking countries or the more famous US beauty influencers.

In addition, by further analyzing the following two topics:

1. The products used in the makeup tutorial videos of the most mentioned international makeup digital influencers (e.g. *Huda Beauty, Sananas, Nikkie Tutorials and Farah Dhukai*);

2. The brands and products consumers mentioned when asked about their knowledge of international brands that are not available in Tunisia;

We can, first, suggest that social media and digital influencers have a big impact on the consumers' brands' knowledge. The brands that were repeatedly mentioned by most consumers are: *Sephora*, *NYX Cosmetics*, *Urban Decay*, *Benefit*, *Huda Beauty*, *Too Faced* and *KIKO*. These same brands are featured in several social media platforms of international makeup digital influencers (See appendix 6 for examples of featured products on famous Youtube videos). *Mariam*, 19 years-old high school student said:

*«It would take me a lot of time to name all the brands that I know and would like to use and see sold in Tunisia. Basically it's every brand that international digital influencers talk about in Youtube videos and that are not available in Tunisia; from affordable brands like Sephora products and NYX Cosmetics to expensive brands like Huda Beauty and Urban Decay ».*

Moreover, social media and digital influencers contribute to consumers' knowledge of products and their usage. Most interviewees admit relying on social media platforms for makeup inspiration, especially Youtube videos. Some of the consumers confessed that thanks to makeup tutorials they now master how to apply makeup as professionals do.

*« I've watched so many makeup tutorials on Youtube that I mastered how to perfectly apply makeup like makeup artists do. I used to go to beauty salons for special occasions like wedding but for the last two years I haven't gone to any as I can do the same job as they do on my own face. I even apply makeup on my mother and friends for special occasions ».* (Nada, 25 years-old)

Industry managers have also mentioned in the interviews that they think makeup consumers' knowledge noticeably increased in the past few years. *Sondes M'farrej*, owner of *Voluptée*, thinks that « digital influencers and especially makeup and beauty Youtubers have a big influence on consumers » and that « Consumers' knowledge in products, brands and makeup application techniques increased more than ever thanks to them». *Sofia Lachtar*, a beauty influencer and professional makeup artist also confessed:

*« I feel that social media highly increased people's awareness of brands and makeup techniques. That is a great advantage for me as a makeup artist since clients became more comprehensive and less sensitive to my remuneration. They know more the value of the service that I am offering and the brands that I use ».*

## **H7: The makeup digital influencers sphere is evolving**

Several digital marketing and public relations agencies are now offering tailored services for digital influencers and managing their relationship with brands, distributors and retailers. The most prominent examples are *Streamerz*, *Eminence* and *MM Events & PR*. More recently, *Narjess* and *Nessrine Mizouni*, the beauty and fashion digital influencers, established their own digital influencers' management agency. Their agency offers several services tailored to help Bloggers, Vloggers and all influencers to better manage their online imprint, their collaborations with brands and distributors and to create more customized and professional contents for their followers (Author's interview, 2017).

The relationship between the makeup brand managers and distributors and the beauty digital influencers in Tunisia is also evolving. Indeed, all the interviewed makeup digital influencers talked about how challenging it was and how the situation is changing, especially in the last few years. The following quotes exemplify what makeup digital influencers confessed about this:

*« The first contacts with brands in Tunisia were quite challenging. They were noticing our presence on social media but they did not understand the phenomena nor did they do efforts to get informed about how this works... Now most brands and distributors realize how important our impact as digital influencers is, they respect us more and they pay us accordingly with the efforts we put into collaboration and the span of our social media presence ». (Narjess Mizouni, makeup and fashion Blogger)*

*« Now with the development of the influencers market, when we receive gifts we are no longer obliged to talk about the products. It became more professional, brands and distributors now realize that they cannot ask us to promote their brands or post pictures..etc without having something in return... About PR events, we have a greater variety now which allows us to be more selective about who we want to collaborate with or not ». (Fatma Zahi, Makeup, fashion and lifestyle Blogger)*

### **4. Conclusion:**

The makeup market in Tunisia has changed a lot in the previous years. One of the major changes is that consumers are favoring middle and mass market brands over luxury and premium brands. Our research suggests that this trend is driven by several factors:

- Social media influencers are more engaged in promoting middle and mass market brands.

- Local distributors and retailers still have the freedom to manage these brands in Tunisia while they lost control over the luxury and premium brands management.
- Local distributors, retailers and brands are starting to embrace the digital influencers trend and readapting their digital strategies to the consumers' needs.
- The economic situation affected the consumers' purchasing power; hence consumers are more price sensitive and seek more value products.
- Middle and mass market brands invested in product development and are offering a wider range of products with higher quality.

### **5. Recommendations to the main market players:**

- Recommendations to international luxury and premium brands: As the middle and mass markets are rapidly expanding, luxury and premium brands should redefine their strategies in the makeup market in Tunisia. Some brands, like *Estée Lauder*, *Clinique* and *Lancôme*, are already acting by collaborating with beauty digital influencers and inviting them to the brands' global PR events in different parts of the World (digital influencers' social media observations, 2016/2017). Yet, these collaborations are not perceived as engaging enough to potential consumers. International luxury and premium brands could further engage the consumers and hence boost sales by creating local fan pages on different social media platforms dedicated to Tunisian consumers; or by giving their representative distributors and retailers more freedom to create social media contents around these brands. The influence of the Bloggers and Vloggers is an opportunity for global marketers to gain market share and reinforce their brands awareness.

- Recommendations to international middle and mass market brands: International middle and mass market brands are well performing in Tunisia. Hence, they should continue with their efforts of engaging consumers by maintaining a constant relationship with beauty digital influencers and further building their online presence. Furthermore, up-and-coming

international middle and mass market brands, such as *NYX Cosmetics*, *Color Pop*... could benefit from the current situation by expanding their distribution channels and offering their products in the Tunisian market.

- Recommendations to local brands, distributors and retailers: The makeup industry could strongly benefit from using social media as a marketing tool given the usefulness of tutorial videos in demonstrating the products and their application techniques (Mohiuddin, 2015). Consumers heavily follow international beauty digital influencers, which increase their overall knowledge about makeup. Therefore, local brands should develop and further invest in digital marketing strategies to build a more youthful brand image and attract more consumers. Moreover, most consumers complained about the quality of the local brands' products. As international middle and mass market brands are now offering better quality products and are rapidly expanding in Tunisia, local brands should invest more in research and development to grow their products ranges and improve the quality in order to be able to survive against the international competition. In addition, many interviewed consumers claimed that they know more about makeup than the retailers' sales teams. Retailers should therefore develop a better recruitment and training strategy for their sales agents and beauty counselors to level up with their customers' expectations. Moreover, in the interviews, most consumers talked about their interest in several international brands that are still not available in the Tunisian market. This represents an opportunity for makeup distributors to expand their makeup brands offer in the market and gain more consumers.

#### **IV. Limitations:**

1- The first limitation of this Work Project is the reluctance of the market players to participate in the research and the resulting low number of respondents in the industry managers' sample.

- 2- Several industry managers were furthermore reluctant to communicate detailed market shares and sales results. There is therefore in this Work Project a lack of financial data that could have supported our hypotheses.
- 3- There was also reluctance from consumers to participate in the research. Many persons declined to partake in in-depth interviews; which might be due to the conservative culture in Tunisia. In order to address this issue, all the consumers' interviews were established through personal contacts and interviewees' referrals. Hence, most of the respondents share similar social and educational backgrounds, which constitutes a limitation.
- 4- We however believe that this Work Project will contribute to add knowledge to a topic that has not yet been fully investigated in Tunisia.

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A Work Project presented as part of the requirements for the Award  
of a Master Degree in Management from the NOVA School of  
Business and Economics

How is the makeup market in Tunisia changing?  
Recommendations to the main market players on how to grow and  
improve the consumer experience.

## APPENDICES

Rim Zorgati – Student Number 2713

A Project carried out on the Master in Management Program under  
the supervision of: Professor Catherine da Silveira





26.05.2017

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**Appendix 1: Most famous beauty digital influencers in Tunisia: Social media platforms activity and followers' statistics**

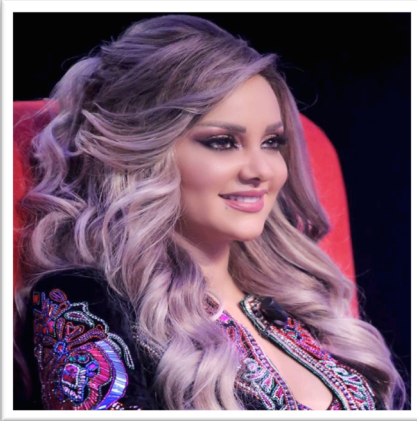
NAME/ Username	Number of followers			Level of Activity Snapchat 	Blog/Website
	Instagram 	Facebook 	Vlog/ Youtube 		
Manel Amara	670K	2.8M	40K	★ ★	Not applicable
Ons El Hammami: Ons HM	233K	73K	117.4K	★	Blog: Ons H-m
Raya Bouallegue: Pink Trip	208K	89K	Not applicable	★ ★ ★	Not applicable
Wafa: The W	131K	49.8K	23.5K	★	Blog: The W Beauty
Amina Minouch	100K	3.7K	Not applicable	★ ★	Not applicable
Hend Jebali: HEND	89.2K	Not applicable	Not applicable	★ ★	Not applicable
Donia: Diotisdiaries	89K	38.7K	34K	★ ★ ★	Blog: DiotisDiaries
Fatma Zahi: zzfh & street style Tunisia	70.6K	22K	8.4K	★ ★ ★	Blog: Street Style Tunisia
Rym Khouja	60K	20K	17K	★ ★	Blog: Rym Khouja
Narjess: mon journal pas tres intime	52K	39.7K	1.9K	★	Blog: Mon journal pas trés intime
Vitalunaspirit	39.2K	24.6K	Not applicable	★	Website: Vitalunaspirit.com
Sofia Lachtar	11.2K	2K	X	★ ★ ★	Blog: Lady Red Strawberry
Amira Hidar	6K	Not applicable	18.7K	★ ★	Not applicable

Source: Thesis author, based on market research and social media platforms observation.

- Note1: Social media followers data updated on May 8, 2017.
- Note 2: level of activity on Snapchat ranked on a 3 stars scale from **1 star** being «low level of activity» to **3 stars** being «high level of activity».

## Appendix 2: Most famous beauty digital influencers in Tunisia: Detailed information

- **Manel Amara:**



Manel Amara, a Tunisian singer or “show girl” as she prefers to call herself, is the most important social influencer in Tunisia. Her proximity to the Tunisian society and active engagement in the society helped her gain hundreds of thousands of followers.

The celebrity takes advantage of her status to advocate her favorite brands and showcase her everyday lifestyle, fashion and beauty styles.

Today, her Youtube channel has a total of 8.5 Million videos’ views (socialblade, 2017). In 2015, Manel also acquired a franchising agreement for FASHION MAKE-UP, a French cosmetics brand, and became their exclusive brand ambassador and retailer in Tunisia.

- **Ons El Hammami/ Ons H-M:**



Ons is a 23 year old English literature student, Youtuber, fashion blogger and fashion journalist in a TV show called “Tunivisions live”. She started her career as a digital influencer in 2013. Ons is the first veiled Youtuber in Tunisia and among the first in the Arab world; this was one of the reasons why she decided to become a fashion and beauty digital influencer.

Ons is passionate about giving to the world a new and modern image of veiled Muslim women (Le courrier de l’atlas, 2016).

Today, she has the second largest base of followers among makeup digital influencers in Tunisia. Her Youtube videos have nearly 7 millions views in total (socialblade, 2017).

- **Raya Bouallegue:**

Best known as “Pink Trip” or “Rayou”. Raya never had a Blog or Vlog; She only started her journey in November 2015 on Snapchat. Yet, her boldness, spontaneity and unique style made a buzz over the Tunisian Internet community and thus brought her many followers (ITW FOR, Likwid TV by Ooreedo, 2017).

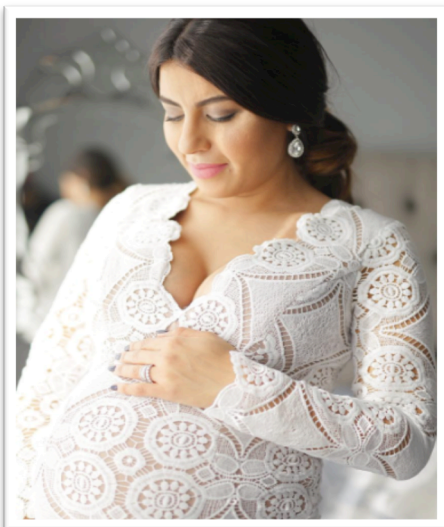
## Appendix 2: Most famous beauty digital influencers in Tunisia: Detailed information



From then, she started posting about her beauty and fashion tips, collaborating with brands and sometimes doing makeup tutorials on Snapchat. Raya's unique style also made her a social phenomenon. People from all regions of the country, all genders and age groups follow her and aspire to her style and charisma. Raya developed from a simple digital influencer to a symbol of a community that she calls "Snapchat Family".

She regularly hosts meet ups and outings with her fans, where she tries to give them her intake about life and the power of positive thinking, all with the goal of trying to reconcile the societal differences that were built up in Tunisia over the years and create a better homogenous environment to live in. This in turn brought her several new opportunities. In June 2016, She became a co-host for a radio show broadcasted every Saturday on IFM, a local radio station. Her name "PINK TRIP" became a registered brand and she thinks of the possibility of launching her own fashion or beauty brand (ITW FOR, Likwid TV by Ooreedo, 2017). Currently, she has on average 15,000 daily followers on Snapchat (Author's interview, 2017).

- **Amina Khedhir:**



Best known as "Amina Minouch". She doesn't have a blog or Youtube channel, she gained her status thanks to the quality and originality of her posts on her Instagram account. Recently, she was invited by a Hungarian TV channel to shoot a 3- day documentary about her routine life to promote modern Tunisian lifestyle and tourism post-revolution. Apart from being a fashion and beauty digital influencer, Amina is also the local brand manager of the clothing brand "Oysho".

## Appendix 2: Most famous beauty digital influencers in Tunisia: Detailed information

- **Donia:**



Donia started her blog “Diotis Diaries” and her Youtube channel “Diotis by Donia” in 2013. She is very active on Youtube and posts videos on a weekly basis. She gained several followers thanks to her spontaneity and simple style. Her videos topics are rich and diversified; they go from makeup tutorials and home-made recipes for skin and hair care to shopping Hauls. Her Youtube total views accounts for 1.3 million.

- **Fatma Zahi:**



Best known as “Fatma ZZFH” or “Street Style Tunisia. Fatma had a personal account on which she posted her daily makeup looks and fashion outfits. Her friends liked her style and encouraged her to become a digital influencer. She then created the Instagram account “Street Style Tunisia” on which she not only posted her personal looks but also look inspirations that followers sent her through direct messages (Author’s interview, 2017). When it took a big magnitude and she gained hundreds of followers, she started a blog in 2013. Currently, she also has a Youtube channel with over 100,000 views for only 6 videos.

- **Rym Khouja:**



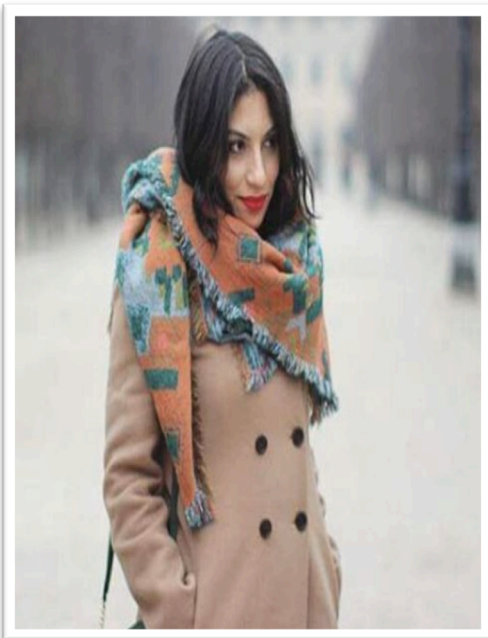
She started blogging and created her own Youtube channel when she was studying in Canada in 2013. At first, she started her journey in English; But when she moved back to Tunisia she changed her posts styles to adapt to the local style. She also neglected the blog to focus more on Vlogging.

## Appendix 2: Most famous beauty digital influencers in Tunisia: Detailed information

She's a big advocate of cruelty free makeup and tries to only use and promote brands there are against animal testing. Though, she admits that it's hard to keep on standing by this cause due the makeup industry current status in Tunisia, and the trend still haven't caught consumers attention (ITW FOR, Likwid by Ooreedo, 2017).

Another important thing to notice, Rym used to focus solely on makeup; yet the reality of the Tunisian market mad her change her style. Currently, her posts are in line with those of all the Tunisian influencers: it goes from makeup, to skincare, fashion and clothing, and "good plans" of restaurants and newly opened places. Rym's Youtube channel has a total of 460,000 videos' views.

- **Jess Narjess:**



Narjess is one of the first Tunisian bloggers. She started her blog "Mon journal pas très intime" in 2010. She worked for a year as a beauty and fashion editor in "Tunivisions" a local news and lifestyle magazine. She also had a training in fashion design at the international school ESMOD in Tunis and a training in professional photography. She worked as content creator for the makeup distributor *Obeauty*, managed their instagram account and their blog "Obeauty story". Now she works as a consultant in digital marketing and also created a digital marketing agency with her sister (who is also a blogger known as "the one and only Ness").

Their agency offers several services like digital influencers management, content creation on social media, graphic design, photography, videography and events management for brands.

## **Appendix 3: Interview guides**

### **I. Interview guide for Industry managers:**

**1. Warm-up:** “First of all, thank you for agreeing to do this interview. As you know I am doing my master thesis about the changes in the makeup market in Tunisia and the drivers of these changes. For this research I am using a technique called semi-structured in-depth interviews. It means I will not ask you specific questions about the subject but rather open ended questions. Please feel free to tell me what ever comes to your mind as there no right or wrong answers. Any information you can provide may be important for us. The interview will last approximately 45 minutes. If you don’t mind, I am going to record it but as mentioned before all the data is confidential and is for the purpose of this research only.”

**2. Makeup market changes:** How did makeup consumption change in the last few years? Do consumers demand more International or local brands? More Luxury and premium brands or middle and mass-market brands?; What are the Products trends? Which categories of brands or products are selling more than others? ; How did your relationship with local suppliers and/or international brands change in the last few years?

**3. Drivers of the changes and social media impact:** What do you think are the main drivers of these changes? Both, the changes of makeup consumption and changes in the relationship with suppliers and/or brands; Where do you stand on social media?; Do you integrate social media in your company’s strategy?; Do you use sponsored ads on social media?

**4. Role of digital influencers:** Where do you stand on influential marketing?; Have you worked before with makeup digital influencers? If yes, describe the experience and how it was initiated and organized...Etc; How important is social media and digital influencers are for your company/brand?

### **II. Interview guide for Digital Influencers:**

**1. Warm-up:** “First of all, thank you for agreeing to do this interview. As you know I am doing my master thesis about the changes in the makeup market in Tunisia and the drivers of these changes. For this research I am using a technique called semi-structured in-depth interviews. It means I will not ask you specific questions about the subject but rather open ended questions. Please feel free to tell me what ever comes to your mind as there no right or wrong answers. Any information you can provide may be important for us.

### **Appendix 3: Interview guides**

The interview will last approximately 45 minutes. If you don't mind, I am going to record it but as mentioned before all the data is confidential and is for the purpose of this research only."

**2. Personal Story and style changes:** When did you start blogging/Vlogging and why?; Where did your passion come from? Who or what inspired you?; How did your personal style as digital influencer change overtime? What were the drivers of this change?

**3. Social media and makeup consumers:** What is your favorite social media platform? And why?; How did your relationship with your followers change overtime? The nature of the interaction, their engagement, the topics you share with them, do they have an impact on your choice of brands or collaborations, their knowledge of the makeup market...Etc; What are the main sources/causes of these changes? Is there a difference in the relation between your followers over different social media platforms? For example, for you, is there a difference in your relationship between your followers on Instagram and your followers on Snapchat? Describe; Is there also a difference between your posts and your behavior over different social media platforms?

**4. Makeup market changes:** How did your relationship with brands, retailers and distributors change overtime?; What are the main sources/ causes of this change?; What do you think of brands behavior/presence on social media in Tunisia?; Which up-and-coming brands, future makeup trends and international digital influencers do you think are/or can have a strong presence/impact in Tunisia?; How does this affect your work or your relationship with brands and your followers?

### **III. Interview guide for Consumers:**

#### **1. Pre-selection questions:**

Filter 1: Have you used at least one makeup product in the last week?

- If yes, continue to filter 2; if no, stop interview.

Filter 2: How old are you?

- If the answer is between 15 and 35 years old start interview; if no stop interview. .

**2. Warm-up:** "First of all, thank you for agreeing to do this interview. As you know I am doing my master thesis about the changes in the makeup market in Tunisia and the drivers of these changes. For this research I am using a technique called semi-structured in-depth interviews. It means I will not ask you specific questions about the subject but rather open ended questions.

### **Appendix 3: Interview guides**

Please feel free to tell me what ever comes to your mind as there no right or wrong answers. Any information you can provide may be important for us. The interview will last approximately 40 minutes. If you don't mind, I am going to record it but as mentioned before all the data is confidential and is for the purpose of this research only.”

**3. Makeup usage habits and brands and points of sales preference:** Describe your daily makeup routine?; What products do you usually buy? (Makeup preferences, international VS local brands, brands' trust, brands awareness...etc.); Why do you use makeup? (Culture? Trends?); Where and how do you usually shop for makeup? What are your favorite points of sales? And why?

**4. Social media and digital influencers:** What are your main sources of information, inspiration and trends regarding makeup?; If I say digital influencer, what image comes to your mind? Describe; Do you follow any Tunisian digital influencers? If yes, How many? Who? Why? How frequently? If no; why not?; Do you follow any international digital influencers? From which country? Why?

**5. Makeup market knowledge:** Are you aware/ or follow any international makeup trend and/or brands that are still not available in Tunisia? Who? What? Why?; Do you follow local makeup brands on social? What do you think of their online presence compared to international brands? What changes would you like to see?

## Appendix 4: Elegant product launch campaign – social media content



Search: elegant in First Fashion Commun...

Mayssa Ferchichi ▶ First Fashion Community  
January 20 · Tunis · 🇹🇳

Hello les filles je vous parle de quelques references et premières impressions des gloss matt **Elegant** et des produits Nihel sur mon snap TRIPSTYLEBLOG ❤️  
Merci Merci **Elegant** ❤️ (snapcode en commentaires)



Search: elegant in First Fashion Commun...

Hend Jebali ▶ First Fashion Community  
February 26 · Facebook Groups for iOS · 🇹🇳

Ce lot de Liquid Lipsticks de la marque **Elegant** est à gagner ! Concours sur mon Snapchat : hendjebali



Search: elegant tunisie

Top | Posts | People | Photos | Videos

Leila Abid ▶ Streetstyle Tunisia  
February 20 · 🇹🇳

From Montreal with love 🇨🇦🇵🇶🇸🇰

J'ai vu passé quelques commentaires concernant les produits **Elegant**, entres autres ceux qui apparaissent sur la photo. J'aimerais souligner le fait que dénigrer un produit et le critiquer sont deu... Continue Reading



Search: elegant in Streetstyle Tunisia

Mariam Boughzala ▶ Streetstyle Tunisia  
February 4 · 🇹🇳

Bonjour tout le monde! Ou je peux trouver les liquid matte "**elegant**" à sousse svp? Merci :)

9 Com  
**Translation:** Hello everybody!  
Where can I find the liquid matt 'Elegant' in Sousse Please?

Memmi Narjess ▶ Streetstyle Tunisia  
February 3 · 🇹🇳

Bonjour les filles svp ou je peux trouver les nouveaux rouge à lèvres **élegant** au centre ville?

2  
**Translation:** Hello girls, please  
where can I find 'Elegant' lipsticks in the city center?

Search: elegant in Streetstyle Tunisia

Emna Ayadi ▶ Streetstyle Tunisia  
February 6 · 🇹🇳

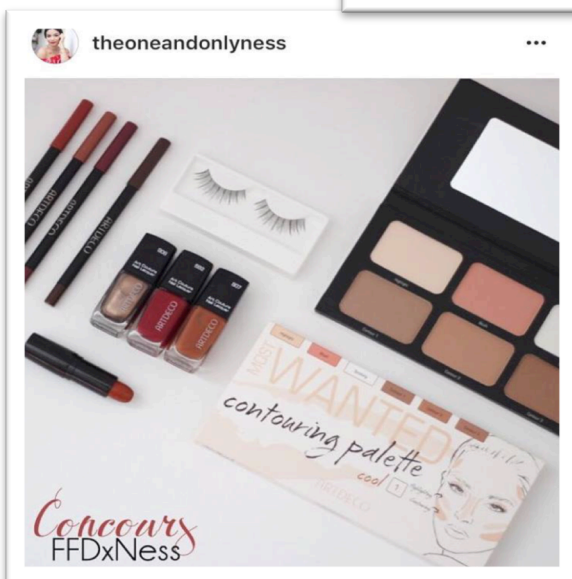
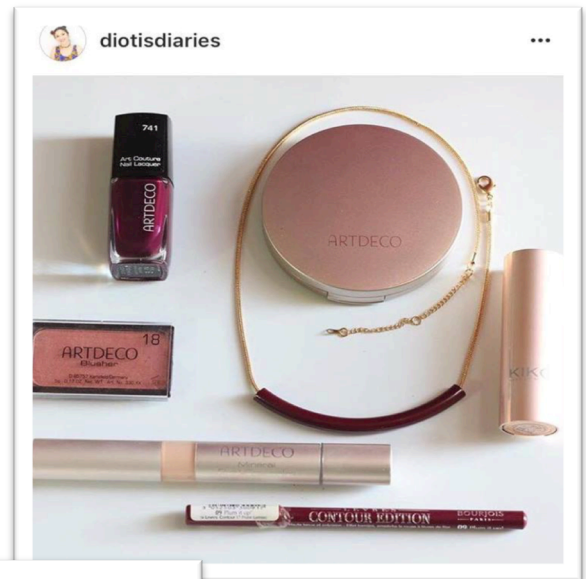
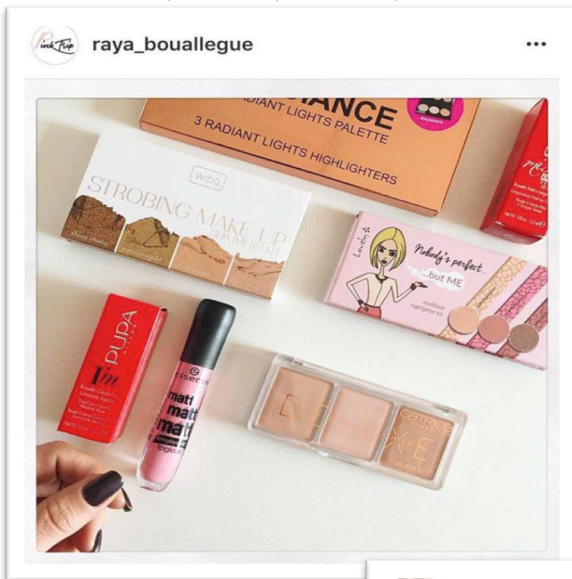
les lip gloss ما نشرين كان انا ما نشرين  
عادي سيدك يا بن سيدك نعد كان انا ما نشرين  
مش معقول 😊 FULL HD de chez **Elegant**  
هيا قدملكم اللي بالسيف خلطت عليهم (بعد رحلة طويلة من البحث و انا كيف المهولة من pharmacie | pharmacie من parfumerie | parfumeries)  
الحاصل ربي يهديك يا نهال **Niels** راک هيلتنا 😊😊

**Translation:** I present to you the 5 references of 'Elegant' full HD liquid matt lipstick. I went crazy from a perfumery to the other and from a pharmacy to a pharmacy until I found them. Niels (referring to the owner of the brand) you



### Appendix 5: Examples of Tunisian digital influencers Instagram content about middle and mass-market brands

Featured middle and mass-market brands: WIBO, Makeup Revolution, Lovely, Pupa, Essence, Catrice, Artdeco, KIKO and Bourjois.



## Appendix 6: Brands featured in international digital influencers Youtube makeup tutorials

YouTube interface showing a video titled "The Power of MAKEUP!" by NikkieTutorials. The video player shows a woman applying makeup. The video has 35,329,351 views and 6,819,927 subscribers.

**PRODUCTS USED:**

- Koh Gen Do Aqua Foundation "213"
- Urban Decay Naked Skin Concealer
- Anastasia Beverly Hills Brow Wiz
- Anastasia Beverly Hills Dip Brow
- Too Faced Chocolate Bar Eyeshadow
- Kat von D Tattoo Liner "Trooper"
- Kat von D Shade/Light Contour Palette
- Milani Baked Blush "Luminoso"
- The Balm Mary-Lou Manizer Highlighter
- MAC Lip Pencil "Boldly Bare"

YouTube interface showing a video titled "Luxe VS Dupes ! Qui remportera le combat ?" by Sananas. The video player shows a woman with makeup. The video has 1,365,976 views and 1,673,042 subscribers. Price tags are visible: 610,30€ and 156,90€.

**Produits mentionnés dans cette vidéo :**

**Produits moins chers :**

- Base NYX Angel Veil : <http://bit.ly/21rRAHL>
- Fond de teint Air mat Bourjois (beige doré)
- Anti cernes Effacer yeux Gemey Maybelline
- Poudre Inglot 302
- Bronzer master sculpt Maybelline
- Bronzer lumineux ELF : <http://bit.ly/1RhIfcZ>
- Highlighter I heart make up : <http://bit.ly/1Rf>
- Blush H&M Tanny Peach : <http://bit.ly/1P8W>
- Color Tattoo Maybelline Creme de nude
- Crayon sourcils NYX Brun cendré : <http://bit.ly/1Rf>
- Super Liner L'oréal : <http://bit.ly/250CLr1>
- Mascara Faux cils papillon sculpt L'oréal : <http://bit.ly/1Rf>
- Palette Zoeva Smoky : <http://bit.ly/1RK3PRv>
- Crayon Golden rose 426 : <http://bit.ly/1RK4v>
- Crayon Kiko 02 : <http://bit.ly/1RhIQvk>
- Rouge à lèvres Rimmel 070 : <http://bit.ly/1Rf>

**Produits plus chers :**

- Base Laura Mercier : <http://bit.ly/1RhJhFY>
- Fond de teint Luminous silk Armani : <http://bit.ly/1Rf>
- Anti cernes pro longwear mac
- Poudre secret brightening Laura Mercier : <http://bit.ly/1Rf>
- Bronzer Tom Ford
- Bronzer Tarte : <http://bit.ly/1TJpyil>
- Tangerine Blush Burberry : <http://bit.ly/1QSF>
- Highlighter Bobbi Brown Pink Glow
- Crayon sourcils ABH Dark Brown <http://bit.ly/1Rf>
- Paint pot mac soft ochre
- Palette smoky Urban Decay : <http://bit.ly/1K>
- Eye liner Magic Marc'er Marc Jacobs : <http://bit.ly/1Rf>
- Mascara Volume Chanel : <http://bit.ly/1FWL>
- Crayon Nars rue Bonaparte : <http://bit.ly/1N>
- Crayon à lèvres Marc Jacobs Prim(rose) : <http://bit.ly/1Rf>
- Rouge pur couture YSL : 10 beige tribute <http://bit.ly/1Rf>

## Appendix 6: Brands featured in international digital influencers Youtube makeup tutorials

YouTube interface showing a video player for Huda Beauty. The video title is "TOP REQUESTED! My Signature Look! | مكياج اليومي المفضل". The video has 546,996 views and 20,871 likes. The video player shows a woman with long dark hair and a light blue top. The video progress is at 15:09 / 15:42. The video description includes the following products used:

Products used:

- Huda Beauty Rose Gold Palette: <http://shophu>
- Christian Louboutin Ink Liner: <http://bit.ly/2nL>
- Urban Decay Perversion Mascara: <http://bit.ly>
- Huda Beauty Lashes (Farah): <http://shophuda>
- Huda Beauty Lashes Lash Glue: <http://shophu>
- Smashbox Photo Finish Primer Oil: <http://bit.l>
- Huda Beauty Foundation - Coming Soon ;)
- Sephora Bright Future Gel Concealer: <http://bi>
- Cover FX Custom Enhancer Drops (Sunset): <http://bit.ly/2jT9aT>
- Nars Pressed Powder: <http://bit.ly/2jT9aT>
- Guerlain Blanc De Perle Compact Foundation:
- Huda Beauty 3D Highlighter (Golden Sands) -
- Lorac Bronzer Palette: <http://bit.ly/2kfzxQG>
- Marc Jacobs Air Blush: <http://bit.ly/2nLCv00>
- Huda Beauty Lip Contour (Trendsetter): <http://>
- Huda Beauty Liquid Matte (Girlfriend & Crush

YouTube interface showing a video player for farahdhukai. The video title is "Easy Everyday Make Up (requested look)". The video has 701,825 views and 7,071 likes. The video player shows a woman with long dark hair and a pink top. The video progress is at 8:06 / 8:30. The video description includes the following products used:

MAKEUP:

- Farsali Volcanic Elixir: <http://bit.ly/1Chu6>
- Maybelline Fit Me #240: <http://amzn.to/1>
- Maybelline Fit Me Concealer Medium 25:
- Rimmel Stay Matte Transparent: <http://a>
- Becca Low Light Sculpting Perfector
- Bobbi Brown Beige Shimmer Brick: <http://>
- Tarte Exposed Blush: <http://amzn.to/1xX>
- Bobbi Brown Cream Shadow Stick Sand
- Becca Ombre Nudes Palette: <http://amzr>
- Kat Von D Tattoo Liner Trooper: <http://an>
- Givenchy Volume Couture Mascara: <http://>
- Mac Whirl Lipliner: <http://amzn.to/1yDfv>
- Kiko Long Wear Lipstick:
- Maybelline Nude Embrace: <http://amzn.t>

## **Appendix 7: Transcribed interviews (Translated from Arabic)**

### **I. Industry managers interviews:**

#### **1- Obeauty (makeup distributor): Interview with Ouns Besrou – Marketing director** **- Consumer behavior change:**

The luxury makeup market collapsed in the last 5 years due to the economic situation and the decreasing purchasing power. Before consumers used to buy much more luxury and high end brands that they do now. Their knowledge about makeup brands wasn't as developed as it is now and thus they used to go for the most famous and trusted brands. When it comes to trendy products it is on par with international trends. The products that are selling most are contouring products, highlighters and liquid matt lipsticks.

#### **- Influence of social media on consumer behavior:**

Social media has a big impact on consumer behavior. As I mentioned before the demand for high end products noticeably decreased. That is not only due to the decrease in purchasing power but also to the influence of social media and bloggers. Most digital influencers generate their content around middle market and mass-market brands. They also contributed to promoting several up-and-coming brand that didn't exist in the market before like: Artdeco, Lovely, Catrice and Essence.

#### **- Our stand on social media and digital influencers:**

We work a lot on social media we have our own Facebook and Instagram account. We try to be very active and to produce constant content. We still haven't sponsored any of our posts on these platforms yet. But we are working with a digital marketing agency now to build a steady plan to sponsor our Ads on social media platforms. We also collaborate on a frequent basis with digital influencers. We send them free products to test and we always invite them to discover our new products and collections. We also organize workshop with makeup artists and invite influencers to show them the latest trends in makeup application techniques. As well as inviting them to different product launches events.

#### **- Relationship with brands and retailers:**

Brands are much more demanding now and impose stricter control. They also impose credit limits and fixed sales percentages due to the high risk of investment in the industry with the current economic situation.

#### **- Relationship with influencers:**

Influencers are becoming more and more demanding. They are more demanding when it comes to brands choice, to the conditions of collaborations and especially for their remuneration.

## **Appendix 7: Transcribed interviews (Translated from Arabic)**

This is partially due to the fact that several digital influencers have made blogging or Vlogging their job and thus their main source of revenue. But we do realize that they are essential to our work and to our communication strategy.

**2- Voluptée (small perfumery/ drugstore retailer):** Interview with Sondes M'farrej – Owner of the perfumery

### **- Consumer behavior change:**

Consumers are now asking more for middle market brands. In my opinion, this is partially due to the decrease in purchase power on one hand. On the other hand, it is because middle and mass-market brands noticeably improved their quality and invested a lot in product innovations and diversity in the last few years.

What I noticed also is that even consumers that used to buy high-end brands shifted to middle market brands after the revolution. The products that are demanded the most in the last year are liquid matt lipsticks, contouring products and eyebrow products.

### **- Relationship with distributors and brands:**

International brands and distributors became more demanding. They also became more reluctant and meticulous because they want to keep up their old standing in the market. The sales objectives they set for us, as retailers, are much more demanding especially in the last 3 years. For example, I've been a retailer for Chanel and Dior products for years. Now that sales have decreased they have been threatening to take out the brands from our store for nearly two years. They increased the sale objective we had in our agreement. This forces me as a retailer to push their products more than the middle market brands I sell. I also make more promotions and give more discount advantages to my loyal consumers. I also sell on credit basis to the most loyal among them; I have several customers that buy luxury products but pay me in installments.

### **- Influence of social media:**

Digital influencers and especially makeup and beauty Youtubers have a big influence on consumers. Consumers' knowledge in products, brands and makeup application techniques increased more than ever thanks to them. Consumers also demand more middle and mass-market brands partially thanks to influencers and partially because those brands are now recreating duplicates of high-end products.

## **Appendix 7: Transcribed interviews (Translated from Arabic)**

### **- Our stand on social media:**

Social media surely helps a lot in promoting products and brands. Personally I admit of being guilty of being resistant to change. I only realized the importance of social and the depth of its impact recently, even though my kids have been advising to be more active on the Internet for years. I only have a Facebook page for my store and I am trying to be more active and generate more content. I haven't yet worked with digital influencers and the main reason behind this is that I only have one small store. Though I have worked on several occasions with makeup artists and specialized beauty counselors to organize makeup workshops for our customers. Now, I am making transformations in the store and redecorating it to be more modern and youth oriented. I am also contracting with more middle market brands to increase my customer base. Once all these changes are settled, I am counting on contacting some digital influencers for an event collaboration. It would most probably be a meet up between one of the influencers' and her local followers. I've seen many retailers do this and it importantly boosts sales.

### **3- Féerie (selective retailer stores chain): Interview with Randa Meftah- Marketing Manager**

#### **- Consumer behavior change:**

Before the revolution, we didn't have a large variety of brands. We mostly had luxury brands, a few local brands and a few mass-market brands like L'oréal, Bourjois and Maxfactor. Thus we had a larger demand for high-end brands. Plus the purchase power was higher than it is now. Consumers are thus becoming more inclined towards middle and mass-market. Digital influencers have a great impact on this as well. They are mostly collaborating and promoting middle market brands. As they have a big influence especially on millennials they created a paradigm shift in the market. They have less influence though on 30 years old women and older. The older consumers have already established their brands' preference through years of trial and experimenting. They are also usually more inclined to high-end brands because they have been in contact with these brands for years in the Tunisian market and because they can afford them. Moreover, as a 33-year-old woman, I personally like buying high-end makeup brands. Most of us cannot afford fashion items from luxury brands but at least we can afford their perfumes and makeup products. The products trends are: contouring palettes, eye shadow palettes, liquid matt lipsticks and highlighters.

## **Appendix 7: Transcribed interviews (Translated from Arabic)**

### **- Influence of Social Media:**

Our communication strategy and brands communication strategies are changing. The trend before used to be radios, TVs and magazines. Now it is more digital; It is all about sponsoring ads on social media platforms and collaborating with bloggers.

### **- Relationship with distributors and brands:**

Brands impose a much stricter and direct control on retailers. About a month ago, we had a surprise visit from a regional manager of the brand Dior. She came to check whether we were exposing their product stand in the right place in the store that we previously agreed about, whether the stand was full of products and if they are presented like in the graphic chart they sent and so on. She also checked our sales report and as the numbers decreased, they are threatening to take out their brand of our stores if we don't improve our sales. This strict control system started around 2 years ago; they now control every aspect related to their brands in Tunisia and put more pressure on their representative distributors and on us, retailers. For example, even ads insertion on magazines must be sent to the mother brand for review and permission before being published. In my opinion this change in our relationship with brands, especially luxury and premium brands, is due to many factors. The first is the decrease of purchase power that consequently decreased the sales of high-end products. The second reason, in my opinion, they probably didn't impose much control in the beginning because the makeup market in Tunisia wasn't as big as it now. They probably wanted to gain some market share and increase their brands' awareness. Now that the market is growing larger every year despite the economic situation, they want to impose stricter control rules to keep up with international brand image. When it comes to middle and mass-market brands the relationship is much looser. They don't impose any direct control or sales objectives. The only relationship we have is that at the end of every year when we are planning our marketing strategy for the year ahead, we work together to create a plan for the sponsored ads, for events, discount periods, gifts and loyalty advantages for consumers and some other marketing aspects. Due to the current reality of the market, we are shifting our focus to middle market brands. Not only because they are highly promoted by digital influencers and thus the consumers' demand for such brands is increasing. But also because recently there have been rumors in the makeup industry that Sephora is thinking to open in Tunisia.

## **Appendix 7: Transcribed interviews (Translated from Arabic)**

If Sephora would open it would completely change the market structure and as a small chain we wouldn't be able to compete with it. Thus, we are trying to anticipate that and to build a stronger reputation among consumers as the middle market brands retailer to go to.

### **- Our stand on social media:**

I only started working at Féerie 3 years ago. Before that they didn't have a marketing department. When I started, they only had a private Facebook account, just like a personal account, that had 5000 Facebook friends who are the most loyal customers and the friends and family of the owner of the store. They also had an official Facebook page with 7000 followers. I tried to make the page more active and to post more content; now it has more than 150.000 followers. I also created an official account on Instagram and on Pinterest. We also have a twitter account but I admit it's not very active, mainly because Tunisians do not Twitter that much. I am planning to create a Snapchat account as well since it's becoming more and more trendy. But I am still planning ahead for its content. The idea I have is to collaborate with different digital influencers, makeup artists and beauty counselors to create live makeup tutorials on Snapchat. Apart from social media, I am rebuilding a new website for Féerie that will be online within a few weeks. The new website will be much more user-friendly and has a more modern graphic design than the current one. It will also feature a blog spot that will be run by different influencers periodically. Another new thing is that under every product you will not only find consumers' reviews but also links to mother brands original tutorials on how to use the products. We also recently launched online sales with free delivery services for purchases higher than 100 dinars (approximately 40 euros). When it comes to working with influencers, as I mentioned the marketing department was only created 3 years ago. At first, my bosses were very reluctant to digital change. But now as they are seeing more and more brands, distributors and retailers getting active on social media and collaborating with influencers they are becoming more open to the idea. For example it was only in the last few months that we started working with a digital marketing agency to sponsor our ads on Facebook and Instagram. We are also planning a collaboration with some digital influencers to promote the launch of our new website. My bosses are also more open to collaborate on other occasions and events with digital influencers. You will see all these changes when we launch the new website that is actually part of a whole rebranding strategy for our stores chain. I am also working really hard to change the mentality of all the staff in the administration of the company and in the stores.

## **Appendix 7: Transcribed interviews (Translated from Arabic)**

For example, one thing that I insist on is to properly welcome all the teenagers we receive in the stores. Usually beauty counselors do not pay enough attention to teenagers, as they know that they just come to look and test products but never buy. Though those teenagers are our future customers and will start buying in a few years. They are also the most active on social media platforms. If we do not welcome them as we do for all our customers they can, with a click on their phones, destroy our image all over the Internet. We are also working more on customer service. We educate our stores beauty counselors about makeup trends and techniques; we also ask them to always be well groomed and to put some makeup on. That is another subtle way of marketing. When customer go in stores and see for example one of the counselors with a nice shade of lipstick they would go and ask her about what brand and color reference it is.

### **II. Digital influencers interviews:**

#### **1- Fatma Zahi (ZZFH/Street Style Tunisia): Beauty fashion and lifestyle blogger and digital influencer**

**- Personal story:** I started blogging by a pure coincidence. At first I had a personal Instagram account on which I posted my daily outfits and makeup selfies. Then my friends started asking me to start a blog. The inspiration mainly came from “the sisters” (the sisters are the middle-eastern version of the Kardashians. They are 3 sisters from Lebanon who started off as social media influencers and now have their own reality TV show and clothing brand).

I created the Instagram account street style Tunisia, on which I posted my daily outfits and fashion inspirations that followers sent me through direct messages. When it took a big magnitude, I started my blog in 2013.

**- Style change overtime:** at first I started with fashion, and it wasn't really professional. Even the photos were not of high quality. Now I only use a professional camera, and most of the times I hire a professional photographer for the blog posts. But since Tunisians are more about beauty than fashion, and available cosmetics brand are way more than available fashion brands I redirected my focus to beauty blogging. One of the other reasons why I redirected my focus was because I hated my body transformation when I got pregnant. Yet in the last year after I had my daughter and regained my shape, I missed fashion so much that I started blogging again about clothing and fashion styles.

## **Appendix 7: Transcribed interviews (Translated from Arabic)**

**-what influenced these style changes:** it was more practical and more comfortable for me as I said when I got pregnant, to focus more on beauty than fashion, that way I could focus less on my body transformation and more on my makeup and hair looks. Then after the pregnancy, my clothing style also changed; before I used to wear more classic styles and high heels, now my style is more about sport chic. I also became very fond of sneakers. How I realized that my style changed drastically was when I organized a “vide-dressing” with a few other influencers, I noticed that I haven’t worn many of my old clothes for a long time, and I had some items that were never worn or that I only wore once or twice. This made me realize that something was off and that I should do a complete style change.

**- favorite social media platforms:** before it was Instagram, now it’s Snapchat and a lower level Instagram because it makes me feel closer to my followers and because the video format makes it easier to communicate more details.

**-relationship with followers:** For snapchat + instagram: before snapchat, i received comments and messages from my followers on instagram but not that many. When I started snapchat, several followers told me they used to think I am snobbish and arrogant which proves that pictures alone can give the wrong idea about a person. But through snapchat they got to know the real me and this created a deep proximity between us. I also now receive more comments on instagram and they mostly come from my snapchat followers who i feel became like a second family and group of close friends.

For the blog: When it comes to the blog, majority of Tunisians do not like reading, even the ones who do visit my blog usually admit they do so to see the pictures and only skim through the articles but never fully read them in details. When it comes to the comments also i don’t receive as many as i do on snapchat and instagram, there’s usually a maximum of a dozen comments from really loyals followers who do everything they can to support me.

For Youtube: youtube is like snapchat, when i created the channel it made a huge buzz among my followers. I have the feeling that my followers prefer the video format. I receive lots and lots of comments and encouragement messages every time I post a video. Especially the last one about my favorite beauty products of the month, I received a lot of heartwarming feedback and the level of engagement was very surprising.

**-relationship with brands/distributors/retailers:** before influencers’ remuneration was sort of a taboo in Tunisia and the market wasn’t as developed as now. The first interactions were with the distributor Obeauty in the form of gifts and makeup workshops once and a while.

## **Appendix 7: Transcribed interviews (Translated from Arabic)**

Now with the development of the influencers market, when we receive gifts we are no longer obliged to talk about the products. It became more professional, brands and distributors now realize that they cannot ask us to promote their brands or post pictures..etc without having something in return. About events, we have a greater variety now which allows us to be more selective about what we want to collaborate with or not.

**-compared to the international market:** we're still way behind. Blogging and influencing became a real job. They get paid for every collaboration, even for attending events. They have more options to be selective and to focus their work on one industry rather than the other, while in Tunisia we still can't really call it a job as even the remunerations we get are minimal compared to those abroad, we also don't have a wide variety and thus we find ourselves forced to jump from a style to another. For example i would love to be solely a fashion blogger, to only collaborate with fashion brands and only attend fashion events yet due to the current situation I find myself collaborating with hair care brands, with makeup brands, fashion brands, and sometimes even hotels, cars retailers...etc

### **- brands' presence on social media:**

For international brands: we have a huge problem when it comes to this. Most international brands do not have a local social media presence. As the market isn't that big we mostly deal with fan pages or instagram account that are destined to the north African region or sometimes to the middle east and north Africa combined. It's also not only about their presence but also in the way they work with influencers. I feel that most brands pay much more attention to the western world than they do to us. This feels kind of disrespectful and demeaning sometimes. I don't want to point fingers or accuse anyone of corruption but I think it's not the brands faults but their regional managers, as strategies are made on a global level, brands most probably are allocating a budget to influential marketing in Tunisia or the MENA region just like they do internationally, but probably like in many other industries the regional responsables must be keeping the money for themselves rather than actually allocating it where it should be. It's getting better now yet as brands are taking more control locally. For local brands: there has been a boom this year especially with the brand ELEGANT. The owner of the brand has a very charismatic personality and both her and her sisters are very active on social media, they sort of represent an IT girls' image. They managed through this to link the brand's image to their image for years.

## **Appendix 7: Transcribed interviews (Translated from Arabic)**

When they created the buzz around the launch of their matt liquid lipstick this year, local brands realized how important social media can be and thus started to follow the path. They developed their brand image and started building an online presence by being more active on facebook and instagram and collaborating with digital influencers.

**-international influencers impact:** “in my opinion international youtubers have the most impact in Tunisia, especially sananas and nour arida (Lebanese).”

### **2- Narjess Mizouni (Jess/ Mon journal pas très intime): Beauty and fashion blogger and digital influencer**

#### **- Personal story:**

I have always been passionate about fashion, beauty and writing. Since I was a kid I used to stand next to my mother and admire her when she’s putting makeup on or getting ready to go out. I also used to love helping my friends and family mix and match outfits as well as putting makeup on them. I’ve also been following several bloggers since 2006/2007. That’s where my passion for blogging comes from, I love sharing my tips and makeup inspirations with people. I remember the story of how I decided to start my blog; it was in 2010, I opened a google search page to see if we have any Tunisian bloggers and didn’t find any. That’s how I got the idea to start my blog and thus became the first Tunisian blogger. Less than a year after, I was joined by Amira haydar “Makeup by Amira” and Sabrina Ferjani “Vitaluna spirit”.

#### **-Style change +followers engagement:**

At first my blog was more about lifestyle, I posted everything from outfit inspirations to restaurants’ good plans: that’s where the name of the blog “mon journal pas très intime” (= my not so personal journal) is inspired from.

- But as I am a very shy person, when I first started the blog, I never posted anything personal; I also used to crop my face out of pictures I post. Even my friends didn’t know about it. As no one knew who I was or who is the person behind the blog I didn’t have a lot of followers engagements. The most engagement I had at that time was when I once did my sister’s makeup and posted the picture. That day I had dozens of comments from people asking me to post pictures of myself and how that picture made the blog feel more “human” and how much they liked. This when I revealed my personality to the public.

## **Appendix 7: Transcribed interviews (Translated from Arabic)**

Our work boomed when Instagram was created. Yet, I personally feel that it was a double-edged sword. Instagram sure got us more visibility and more followers, but it also had a negative impact on the blogs' visits. Instagram became more convenient for people and the number of visitors to the blog drastically decreased. I used to have around 60,000 visits with each article posted now it's a maximum of 15,000. That is very demotivating and it personally discouraged me from writing on the blog. Every article requires a minimum of 48 hours of work from photo shoots to writing and editing; then I get more engagement on an Instagram picture that only takes about 10 minutes to write a caption and post it. Snapchat has also to do with this change. It's just easier for people to scan through Instagram posts or to watch Snapchat stories than to read articles on blogs. Another thing that bugs me in Tunisia, is that people do not make a difference between the nature of digital influencers. Every body is called a blogger this day, anyone with more than 10,000 followers on Instagram or Snapchat is considered a blogger; and that is even further demotivating. This year me and Vitaluna Spirit did an experiment to see if we can boost our blogs visits and revive them. We did an initiative called "sweet December": we would both post an article about a new topic every night at 8 p.m, each from her own perspective. The first few nights we didn't have that many visits but little by little it increased until it reached about 40,000 visits.

I believe that one of the reasons why I don't have a lot of followers compared to many of the new ones, even though I was one of the first bloggers in Tunisia, is because I am very discrete as a person. I don't share any personal details about my self, I am not very active on snapchat, and I only post if I have something valuable to give my followers; sharing just for the sake of being present on social media is not my thing and I rather prefer having few followers who are actively engaging with me and appreciate the efforts I put into my work, than having hundreds on thousands of followers without adding any value to them and without gaining anything from them as well. Even though my profile is public, I also check my followers' profiles every time I get a new follow notification. I never accept any men I don't know, and I have refused several radios and TV invitations as I prefer to keep my online presence restricted to my intended target; the people who share my vision and take on fashion and beauty and with whom I can maintain a mutually beneficial relationship.

## **Appendix 7: Transcribed interviews (Translated from Arabic)**

- Yet, this sort of creates a distance between people and me. The fact that I am overly discrete and reserved, to some people's taste, and that I don't like sharing on social media anything other than what I do as a digital influencer, makes some people think that I am a snob and cold. Though I know how sharing some of your personal life details can enhance the proximity with your followers, I still prefer to not indulge in that; that's is my nature and how I am. In my opinion and from what my blogger friends tell me, too much proximity can be overwhelming sometimes as it can get out of hands. I also think that it is one of the reasons why they receive much more negative comments than I do; because their followers feel that they have the right to know every single detail about their lives and when they don't share that much or when they take some distance from social media, that can fire back sometimes.

- At first the low level of engagement with my followers used to affect my self-confidence. But when I worked on Obeauty story blog I realized that I do have a strong base of followers who trust me and who trust my recommendations.

I feel that people find it a bit hard to approach me. I don't know if it is because of my age or because I am a bit distant and discrete. I am working on myself and trying hard to get over my shyness, yet I still don't feel comfortable with being the center of attention or exposing myself, especially on videos. I created a Youtube channel and did several video attempts; but I was never satisfied with the results and thus to this day the channel and its content are kept private and no one can see them. I get a lot of comments from followers that say they like my style especially on Snapchat and like watching my story because it is all the time straight-forward and because I always go straight to the points without chatting so much.

### **- Relationship with brands/distributors+ change over the years:**

Obeauty is a distributor of middle market brands in Tunisia. I love the products of "Artdeco" a German brand that they distribute. Therefore, I contacted them with the idea of creating a blog for "Artdeco" in order to communicate about their products. They liked the idea but they suggested we create a blog for all their products, and that's how the blog "Obeauty story" was created. For this blog, instead of simply reviewing products, I write all the article in the form of stories about, for example spending a day out with my friends, then subtly mention a product at the end; this way it is more organic and the readers do not feel as it is an invasive marketing. I also created their Instagram account and used to manage it up until a few months ago. This was one my highest paying collaborations and jobs I did as a blogger.

## **Appendix 7: Transcribed interviews (Translated from Arabic)**

The first contacts with brands were quite challenging. Distributors in Tunisia were noticing our presence on social media but they did not understand the phenomena nor did they do efforts to search how this works. I remember one of the first contacts I had for collaboration, I think this was around early 2013 or late 2012, I was contact by a selective retail chain\* (\*interviewee asked not to mention the name in the report) they asked me to write a blog post for the launch of a new perfume, post in on my social media accounts and put the link to their store's Facebook account. When I asked them to send me the perfume to test before making the decision to collaborate or not, and about what I will get in return; they were surprised about my request, refused to send me the products and canceled the collaboration request. I had some people coming to tell me after this incident, that the person who contacted me was gossiping behind my back saying that I am an opportunist who wants to get paid for simply writing an article. That gives you an idea on how clueless some distributors were few years ago and how difficult it was for us as digital influencers to create content and to make a living out of blogging. People in Tunisia are quite resistant to change and that has only started to change around 2 years ago.

The first makeup distributor that started sending free samples to beauty bloggers was Obeauty. At That time Amira haydar was the only beauty blogger in Tunisia. They used to send her all their products to test and did not ask her for anything in return. She had the liberty to talk about whichever products she liked and just omit mentioning the rest of products she didn't like.

For me the first collaboration was with "Intemporel", a Tunisian brand of luxury candles and bath salts products. I used to be a loyal customer but didn't know it was a local brand; when I realized it is, I contacted the owner and suggested a collaboration: I would take professional pictures of the store and products, create content around the pictures and post it on my blog and social media accounts and get paid in return. The owner turned out to have no idea what I was talking about and thus I had to explain to him what blogging and digital influencing is, to show him examples of collaboration that brands do with influencers abroad and also to show him my blog and other Tunisian influencers social media accounts. For this collaboration, I was only paid 200 dinars (around 75 euros) which is basically nothing compared to the current remuneration packages we ask for in Tunisia and more than nothing compared for what international influencers get as well. Yet the guy was so nice and our relationship developed after and I started working as their digital marketing consultant.

## **Appendix 7: Transcribed interviews (Translated from Arabic)**

Today Intemporel is actually one of the most active brands on social media in Tunisia and they do great collaborations with different influencers.

Now most brands and distributors realize how important our impact as digital influencers is, they respect us more and they pay us accordingly with the efforts we put into collaboration and according to the span of our social media presence. Another new thing I noticed in the last two years, some distributors also understood the importance of marketing. Some didn't even have marketing departments in their businesses before. Now, that has not only changed, but they started also hiring community managers for their social media accounts, working with digital marketing agencies etc.

Even though brands and influencers' skepticism is not yet relevant in Tunisia, I do like to be ahead of it. Thus every time I write a blog post or post something on Instagram that is part of a collaboration with a brand I mention it, so that my followers can make the difference between what is sponsored and what is organic. There are few collaborations I did in my early years of blogging that I regret now; currently I became more selective and I only work with brands that I genuinely like their products and that I would go and buy myself if they don't send me free samples. Those products that I identify with and like using are the only products I currently collaborate with and talk about on my social media platforms. There are also few brands that I refuse to work with now not because of the quality of their products but because of how their representatives in Tunisia work. For example, the representative of Yves Saint Laurent Maghreb contacted me, along with 5 other influencers, to be featured in a video for the launch of the perfume "Mon Paris". We were told from the beginning that we will not be paid for it, but as it is Yves Saint Laurent we all agreed to the collaboration. Yet, on the day of the shooting, after seeing the results of the video and its montage and how unprofessional the team they chose to create it was, we were all extremely disappointed. Thus, we refused to share it on our social media platforms and only shared a few pictures from the shooting. When I did share a picture on my Instagram and tagged the official account of Yves Saint Laurent; the representative contacted me and asked me to delete the tag. This is an ultimate proof that the mother brand has no idea about what was happening; and in my own assumption, I assume that they probably had a larger budget for this collaboration and the representatives in Tunisia kept half the money for themselves for cost reduction and that explains the results of the work. This is another reason why I am more selective now and I only work on contract basis.

## **Appendix 7: Transcribed interviews (Translated from Arabic)**

I never let anything run by chance and examine every detail about the collaborations before agreeing to any. True that due to this, many distributors accuse me of being a scrounger but I am an optimist and hopeful that one day soon people in Tunisia will understand that it is a profession and that when we ask for remuneration or provide professional conditions to work by it is our full right as what we give back and what they get back from our followers has a larger impact than what they think.

My latest collaboration with SVR and how the representative of the brand made me hopeful for a better future for digital influencing in Tunisia. I am also extremely honored to see that we are being recognized internationally. The best collaborations I did in fact were not in Tunisia. The ones I will always remember are when I was invited to one of the most famous hotels in the world “La Mamounia” in Marrakech by Clinique Global along with more than 70 digital influencers from all over the world for the launch of their new makeup line in December 2016. The second collaboration is when I was invited by Airbnb to Paris to promote their new feature “Airbnb experiences” and was offered along with my sister a 4-day fashion experience where we had the pleasure to meet a stylist that analyzed our bodies, morphology, and spent the next 3 days on a total re-looking experience, from clothes that suit us, to makeup that goes with our skin type and tones, to hairstyling...etc. More recently, I was contacted by Tarte cosmetics and received a gift package of all their product lines to test and the only thing they asked in return was to mention the products I like on Instagram; to my surprise after the first picture I posted they sent me a voucher of 50 euros, which was totally unexpected and made me so happy to see how professional some brands can be.

Another obstacle we have in Tunisia when it comes to remuneration is the up-and-coming influencers. They personally contact brands and distributors for collaborations and do not ask for anything back, no payment, no free samples, nothing! Thus, even though we have more followers' reach and we provide more professional content due to years of experience, distributors in Tunisia still prefer to work with them for free than to work with us. Some brands also choose influencers according to the number of followers and do not think about whether they go with their brand image or not.

## Appendix 7: Transcribed interviews (Translated from Arabic)

### 3- Sofia Lachtar (Lady Red Strawberry): Beauty blogger and digital influencer and makeup artist

**-personal story:** My family is originally from Tunisia but I was born and raised in Italy. I went to school there, then went to university in London. I only moved to Tunisia around 3 years ago when I got my married and my, also expat, husband decided to move back and invest in Tunisia. I started as a fashion and lifestyle blogger in 2013. Then after less than 2 years I gave up blogging because I was receiving a lot of critics from people in sousse, my hometown. Amira Haydar and I were the only two bloggers in the city and the phenomena was relatively new to people; so were all the time on the spot light.

People used to accuse us of being show offs because they thought sharing your lifestyle or fashion tips on social media is extravagant and arrogant.

Plus brands at that time did not recognize us or value our work.

Thus I decided to focus my energy and efforts on working with my husband for the launch of his luxury casino. I soon got bored after that and wanted to have something for my self and to nourish my passion for makeup. I was already a freelance makeup artist but mainly worked with friends and friends of friends that knew me. Then to gain more credibility and become more professional, I decided to sign up for a 3 months professional makeup artist training in “MAKEUP FOREVER” academy in Paris. At the same time, I started posting makeup tutorials and products recommendations on my Instagram account. As I haven’t deleted my old Instagram account from my lifestyle blogging days, I had an already established followers’ base and that was a big advantage. I more recently created a Facebook page and a Youtube channel, because I’ve come to realize that people in Tunisia prefer Facebook and Youtube to Instagram. I also try to be more active on Snapchat as it it’s the trendiest social media platform for Tunisians.

**-Relationship with followers:** As my blog is in English, I only had a few followers from Tunisia. Even though, now with Instagram, Facebook and Snapchat, I got more reach in Tunisia, still I don’t get that much followers interactions because I mainly use English to communicate. I am not comfortable talking in French nor in Arabic yet I try to work on that. For example, my Youtube videos are in Arabic. Not a lot of people speak or understand English in Tunisia and that represents a huge obstacle for me. But I remain hopeful; as I have noticed that since the revolution people started trying more to learn English, especially with the rise of globalization.

## **Appendix 7: Transcribed interviews (Translated from Arabic)**

I noticed also another thing, usually my followers communicate with me in private messages rather than comments. That gives me the impression that like me they are a little bit shy. It became more noticeable with Snapchat. Most of the time on Instagram I only get “like” notifications, while on Snapchat I receive dozens of private messages on a daily basis. I am also very conscious about what I post on social media. I know the reality of the economic situation and I know that since the revolution more and more people are struggling with money issues. I, on the other hand, have been lucky in this matter. Thus I try to hide some parts of my personal life; I don’t talk about all the products I buy or use and limit my content to certain range of products; so that people do not accuse me of being a show off or being extravagant. I also realize the depth of impact I can have as an influencer and one of the reasons I am conscious about what I post on social media is that I do not want to build unrealistic expectations for my followers. I admit that I am very fortunate financially speaking and that I can afford to buy any makeup or fashion brand I like but that’s because my parents and my husband are both wealthy. If I hadn’t that chance, I would not be able to afford what I can now solely with what I earn as an influencer and as a makeup artist.

### **-Relationship with brands:**

I have never collaborated with brands in Tunisia since I wasn’t living here until 3 years ago. The language barrier must also be another factor why not many brands have contacted me. The few brands in Tunisia that did contact me, I didn’t collaborate with them. I have an image as a makeup artist to maintain. I am my own brand and I don’t want to collaborate with brands just to have more followers reach in Tunisia or just to become more famous on the Internet. The only brand present in Tunisia that I have a collaboration with is the Italian brand “Diego Della Palma” that was launched in March 2017. Yet, this collaboration dates to before their launch in Tunisia because I have been already using their products and collaborating directly with the brand back when I was still in Italy. If I get contacted one day with a brand that I genuinely like and already use as a makeup artist or in my daily life, I would be more than happy to collaborate with them even for free. In my work as a makeup artist I only use professional brands like NARS, MAC, Makeup Forever, Anastasia Beverly Hills... etc I also like to use high-end brands, which in my opinion always provide better quality and higher color pigmentation. For all these reasons combined all the content I currently post on social media is never sponsored. I buy my own products and use them for content creation.

## **Appendix 7: Transcribed interviews (Translated from Arabic)**

Though I admit having several discount advantages with international brands as a makeup artist. For example as an alumni of Makeup Forever academy I have a 40% discount on all their products in France. I also have discount advantages at Sephora because I previously worked as a makeup artist in one of their stores in Italy.

### **- Influence of social media:**

I feel that social media and digital influencer highly increased people's awareness of brands and makeup technics. That is a great advantage for me as a makeup artist as clients became more understanding and less sensitive to my remuneration. They know more the value of the service that I am offering and the brands that I use. But as an influencer that sort of makes my work harder. People have higher expectations and look for more creative content. There are thousands, if not millions, of makeup tutorials on Instagram and Youtube. Thus I have to be more creative in the content I produce to provide an actual added value.

### **- Brands presence in social media:**

On the international level, brands do more research about the influencers they collaborate with, the content they post and always have their main target in the back of their mind. So the content is more selective and more refined. In Tunisia, brands care more about presence than anything. Thus when they look for collaborations the thing they care about most is the number of followers and the span of reach. That creates a distortion between the quality of content brand social media pages post on the international level and in Tunisia.

## **4- Rym Khouja: Beauty Vlogger and fashion and lifestyle digital influencer**

### **-Personal Story:**

I started in 2013 in Canada with a fashion blog but as it was all the time cold it was hard for me to create content and to take photos outdoor. For more convenience reasons, I changed to makeup tutorials on Youtube. It was much easier for me as video shooting is a one-man job. At the beginning I was more careless and did not think much about the quality of the content I post, as Vlogging was more of a hobby than a professional thing for me. I also used to share everything on social media even my personal life with my family and friends. But when I moved back to Tunisia that started changing little by little. I started thinking more about the consequences of over sharing, especially on my family and my boyfriend. Another thing that changed about my style, when I was in Canada I was supporting only cruelty-free makeup brands.

## **Appendix 7: Transcribed interviews (Translated from Arabic)**

When I moved to Tunisia I no longer have that luxury as the cruelty free product trend is still relatively new around the world and most of those brands are not available in Tunisia. I had to compromise on my personal beliefs to be able to follow my passion of beauty Vlogging.

### **-Followers' engagement:**

The social media platforms I use the most are Instagram and Youtube. They are more appealing for brands and people find it easier to comment and interact with you, especially on Instagram. It is also more youth oriented and more dynamic. Snapchat on the other hand feels more personal and I use it as a mean to get closer to my followers. When it comes to the relationship with my followers, when I had less than 2000 followers it felt like a second family. I used to receive lots and lots of comments and it was most of the time positive feedback. Even when I did receive critics it was constructive criticism. When my followers' base grew larger, and with the rise of several influencers, I feel that it became a sort of competition. Facebook groups dedicated for females are the main reason behind this competitiveness. It really surprises me sometimes to see how people rally behind an influencer and bad mouth the others; it became some sort of fanaticism just like what we have for football teams in Tunisia. I always advice my followers against that sort of behavior and that has brought me even more haters. But I don't let that affect me as I still have several followers who constantly encourage me and support me. Social media communities are now getting larger and larger, especially younger generations. It has also influenced followers a lot, especially that we now have more and more digital influencers rising every day. Makeup users in Tunisia have more knowledge than ever now about brands, products and makeup technics. This created a mutual exchange relationship between us. Just as I provide them wit makeup tips and recommendations, they do the same to me sometimes. This also makes their expectations higher and thus I have to put more research efforts to create a valuable content for my followers.

### **-Relationship with brands:**

At first it started slowly and the only distribution group that used to work with influencers was Obeauty. But other distributors and brands started following them.

Now they do understand more the reality of the market and they do more research about digital influencing. More recently they started working with PR and communication agencies to collaborate with the influencers that go more with their brands images and with their needs. I also receive more gifts and products to test than before.

## **Appendix 7: Transcribed interviews (Translated from Arabic)**

Though, influencers' remuneration is still frowned upon by most brands and we usually get treated as scroungers whenever we asked to get paid for something. Another problem in Tunisia, refusing collaborations is kind of tricky and requires a lot of diplomacy. It happened to me several times that I had people gossiping behind my back that I am a snob and arrogant for the simple reason I refused to collaborate with them. I am still optimistic though as change is starting to happen. Us, bloggers, Youtubers and the whole digital influencers community on Tunisia are sticking by each other to impose respect and to make our voices heard to makeup distributors and brands. International brands helped us with that and are helping us further change the status quo. More and more brands and companies are realizing how big influencers' impact can be. There's also more awareness about the nature of influencers' work and that allows us to be more selective and demand our rights be it proper respect or remuneration.

### **- compared to the international market:**

Even though international brands are very active in Tunisia and we get most of our collaborations with them, they still do not treat us the same as international influencers. It might be because the market is much smaller or because of the nature of how brands are managed in the North Africa.

### **- Brands presence on social media:**

Just like the way they work with influencers, international brands' online presence is also much different than internationally. It feels like they do not pay that much attention to Tunisian consumers and to Arab consumers in general, except for the gulf region and mainly Dubai of course. I am very impressed and proud of local brands, especially this year. They finally realized how important social media is and they are putting a lot of efforts to develop an online presence. International brands were the ones to drive this change. The brand Elegant and its owner impress me the most. Nihel, the owner of the brand in Tunisia already has an established IT girl image and has a wide reach to makeup consumers on social media. Yet this year she managed to do a magnificent job by sell out her new liquid lipstick before it was available for sale. She first included some influencers, like myself, in the product development process. During the developing of the lipstick formula, Nihel was sending us product prototypes to give her our feedback about the colors and she indeed took our opinions and released all the colors we recommended her too. During that pre-launch period we were all communicating about the product.

## **Appendix 7: Transcribed interviews (Translated from Arabic)**

Nihel was also constantly communicating about it herself all over Facebook groups and influencers fan pages until it created a huge buzz. The day of its launch the product sold out in hours. Retailers were stocking up everyday and yet they couldn't satisfy the market need. It was insane, people were signing up for waiting lists in order to get the color references they liked and that influencers recommended on their profiles.

### **- international brands and influencers impact:**

People in Tunisia are going crazy for NYX cosmetics products because they see them all the time on international influencers' profiles. In my opinion, if the brand would open in Tunisia, it can sell out for much higher prices and yet people would still buy. Same goes for the brand Color Pop, especially for price sensitivity reasons. Consumers in Tunisia are also aware of most brands that are sold in Sephora through international influencers, like Too faced, Tarte, Huda Beauty... etc. But as we cannot buy them in Tunisia we usually go for their product duplicates in brands like Wibo, Lovely and Essence; these are young and cheap brands that go more with the reality of the market and the current purchasing power in Tunisia.

When it comes to international influencers, Tunisian mostly follow French or Canadians like "enjoyphoenix" and "sananas". Though followers have a more distant relationship with them. They have more of a star figure than Tunisian influencers. International influencers also motivate to provide better content so that followers can find what they see abroad in our local scene.

### **5- Amira Haydar (Makeup by amira/Amira BYH): The first makeup digital influencer in Tunisia; Currently health and fitness blogger.**

#### **-Personal story:**

It was in 2011 right after the revolution, I was 3 months pregnant. It was a very hard pregnancy and the doctor told me that I have to remain in bed rest for the remaining months. That along with the uncertainty and anguish surrounding the political situation of the country right after the revolution, I got depressed and was going crazy with all the political discussion going around me. I remember it as one of the darkest periods of my life. Then we finally got Youtube access around a month after the revolution; It was censored all the years before that. So to kill the time, I was spending my days watching videos on Youtube and getting to know what was out there on this social media platform. That is how I discovered the existence of beauty and makeup Vloggers. It was very entertaining and informative. At that time, most of beauty Youtubers were either American or French.

## **Appendix 7: Transcribed interviews (Translated from Arabic)**

These videos gave me hope and made feel a bit better about myself. I wasn't taking care of myself due to that depression, and I let myself go. But after a few weeks of watching beauty bloggers, it made me want to buy more makeup products and try new things. I was already pretty good at doing my makeup but the professionalism in their videos made want to learn more. As I was bed bound, all my friends and family who used to visit wanted to do their best to try and help me get out of my depression. I used to ask them to buy me the makeup products I saw on Youtube videos and then spend the rest of my time trying to master the techniques and to recreate the looks.

I then got the idea to start my own Youtube channel. I wanted to share my own tips and tricks in my own language to speak to Tunisian women. Especially with the emergence of Muslim extremists and a wave of conservatism that we didn't use to have in Tunisia before the revolution, I wanted to make women voice heard and to show the world that there's a different side to Tunisia, a more beautiful side, beyond what they see on the news. Another factor was that I wanted to do something fun, girly and colorful, to give people a space where they could run away from politics for a few minutes. Since I could do videos from my own, that was even more convenient with my bed rest condition. Youtube allowed me to leave the space I was confined in, to get myself out there without leaving my room and to exchange with people and the world. Even after my son was born, beauty Vlogging was a great way to keep myself busy while at the same time raising an infant. Though after 4 years, things got out of proportions. When my followers' base grew larger and my responsibilities as a wife and mother grew as well, I couldn't find a balance. My family was feeling left out because even when I was with them I was all the time on my phone checking my social media platforms. My followers, on the other hand, were complaining from my lack of interaction and some were accusing me of being arrogant for not responding; but I was having at that time hundreds of comments and private messages a day, I just couldn't keep up with answering to every single one of them. As my concept was to be the close friend and the girl next door I just couldn't keep up with that anymore and my family was feeling left out at the same time. There's was a lot of shaming due to that and I used to receive several hurtful messages from followers saying "Who do you think you are for ignoring me" or that being sort of famous made me change as a person. As sensitive as I am that situation backfired on me and it made feel depressed and absent from both sides of my life and thus I decided to give up Vlogging and quit social media all at once.

## **Appendix 7: Transcribed interviews (Translated from Arabic)**

Another reason why I quit was because I felt being a makeup and beauty Vlogger was no longer relevant. When I started it had a particular reason and I did because I felt the need to interact with people and find an alternative way to get out of my house. But I started getting bored afterwards. I felt that it started becoming redundant and repetitive. I felt that I studied the whole topic from top to bottom and from front to back. I mean how much can you talk about mascara and lipstick. True the brands would change and the collections would change but the end it was still the same products serving the same purpose at the end. I got sick of it basically after 4 years and I lost interest. I felt that everything I had to give to my followers in that topic I have already given; and that I had nothing more interesting to give anymore. I only got back on Social media on January 2017. I have always been an athlete and very active. I have run several marathons and have always had a clean diet. So for my comeback, I decided to share my passion for running and healthy food. Though, this time I've learnt from my previous mistakes and I have been putting boundaries by having strict schedules on social media and leaving a space of distance between my followers and me.

### **- Style change:**

I tried to maintain a constant thread and to always be honest with my followers. At first I used my own products, which were not necessarily luxury brands but mostly middle and mass-market brands. But then the more I became solicited from brands; I had more access to different brands and a larger variety of products to generate content around. Otherwise my style remained the same. I was active on Facebook, Instagram, Youtube and Twitter. But Facebook was my favorite social media platform. Because it was the easiest to use and required less efforts to publish content as Youtube did. Plus, Tunisians were a lot more active on Facebook and I got more engagement there. I had a love hate relationship with Youtube. The videos sure deliver a better quality of message and are more explicit. But video productions require a lot of efforts and work, then the amount of engagement I received on Facebook pictures had a much bigger scale.

### **- Relationship with followers:**

At first it was mostly people who knew me or knew my friends. So the relationship was mostly positive and I had a lot of encouragements and support since it was a more restricted circle. Then the more people knew about it and the larger the circle of followers grew, the feedback was going back and forth from support to criticism. But I admit I liked constructive criticism and appreciated it as it made me improve myself.

## **Appendix 7: Transcribed interviews (Translated from Arabic)**

Only when it went out of proportions, I couldn't keep up with my engagements anymore. It started becoming hectic on my life and on my emotional well-being. That kind of is my fault because when I first started I was very engaged with my followers. I treated them all as close friends and family and took the time to communicate with them on a constant basis. When I got more followers I couldn't find enough time anymore to keep up with all of them as I used to. Consequently, a lot of people got frustrated with me. I guess that has to do with the fact that I was the first beauty Youtubers in Tunisia, people didn't have the experience before and I had they have built high expectations for me. Some couldn't understand why I couldn't reply promptly and why on other occasions I couldn't reply to all the messages and comments I was receiving. Plus at that time there were no influencers' management agencies, no assistant services whatsoever. I was receiving lots of negative feedback and it was never about the content I was publishing but always about why am I not responding to messages. That was the main reason why I quit.

Another aspect of engagement, I used to integrate my followers in my content production. I always asked them about their opinions and the topics they wanted to see on videos.

### **- Impact of social media:**

People in Tunisia have always been passionate about makeup. With the rise of beauty bloggers and Youtubers, their knowledge increased. I've noticed that over the years people became more and more experts about beauty products and the techniques of applying makeup.

### **- Relationship with brands:**

In Tunisia it was very difficult. In the first 2 years, even though I had a large base of followers, brands still didn't know the importance of digital influencers. They didn't see the point and didn't know how they could benefit from a normal person, who's not a makeup artist or who's not a celebrity, but who has proximity with consumers and a deep influence on social media. I think some brands in Tunisia still don't quite get it to this day from what my colleagues tell me. It was only after around 2 years that I started getting brands recognition and was getting collaborations but the relationship didn't change that much. The nature of the market also made me compromise. At first I used to work for free or for very little. But when demand became higher and was solicited by more brands, I felt I was in the position to become more selective and to ask for remuneration in exchange for my promotional content.

## **Appendix 7: Transcribed interviews (Translated from Arabic)**

It also has to do with imitation. Brands in Tunisia don't want to be the first to try new experiences. But when somebody does it and they see that it works, more brands started wanting to collaborate with influencers. That gave me the chance to pick and choose who to work with.

The first brand that trusted me was a small company that imports makeup from Germany. They would give me products to try and that allowed me to create more content. They also used to ask me to organize meet ups with my followers in their retail stores which gives them more visibility and generates sales. There was also a small Para-pharmacy that I used to collaborate with to organize meet ups with my followers. They would give them special discounts on makeup products that day and that also generates more sales for them.

It was only towards the end of my journey as a beauty influencer that brands were being more active on social media and working more with influencers. That is when I started getting invited to press conferences, very nicely organized events for products launch and I was even invited to travel by certain brands. I remember an anecdote about one of my first contacts with brands. I contacted a brand manager, I am not going to site names, and told her that I am a digital influencer and that I have a Vlog and that I am interested to collaborate with them and provided her with some suggestions. She told me: "where is it?". She thought it was a physical location like a store or a business.

### **- Brands' online presence:**

Brands in Tunisia only recently started hiring competent people to manage their image on social media. But we're still far behind the international level. I think the content brands produce on the international level and the collaborations and efforts they put to work on social media is far more professional, more selective and more powerful. It is planned and created for a specific time and target. While here it's just in the beginning. There is much less effort put into it. It is more on a day-to-day basis and most of the time they just take content from the global fan pages and repost it without refining it to the local audience.

### **-Changes that I notice now as an outsider:**

What I notice now is that content creators don't put as much efforts to produce creative content and high quality content as we used to in the begging. Now, it is a much faster content; especially with the rise of Snapchat and Instagram stories. It's instantaneous and disappears within 24 hours. The nature of the content also changed consequently. People no longer have the time nor the patience to read lengthy posts or watch long videos.

## **Appendix 7: Transcribed interviews (Translated from Arabic)**

The expectations and the behavior of the audience changes and that impact the way influencers produce content as well. In my opinion, we used to work a lot harder before. Another factor that has to do with this is the influencers' management agencies and the rise of content creators. That make bloggers and influencers work much easier and simpler. With Snapchat I also have the feeling that influencers post much less on their blogs and Youtube channels. The frequency of posts insanely decreased as well.

### **III. Consumers Interviews:**

#### **1- Maha, 15, Junior school student:**

**-Makeup routine:** I only use mascara on a daily basis because my parents think I am still too young to start using makeup and thus they do not let me apply any.

- Other than mascara, on special occasions like weddings, I also use liquid foundation, blush, lipstick and sometimes eye shadow from my mother or other family members makeup collection.

**-Brand preference:** I only use mass-market brands for price accessibility.

**-Why you use makeup frequently:** I love using makeup because its trendy and it makes me feel older.

**-Sources of info/inspiration:** My main sources of information are Vloggers because I feel they are honest and relatable; they talk about skin problems and how to get over them; they help teens to boost their confidence. They also represent the dream life and a source of inspiration.

**- Points of sale:** Drugstore retailers and super markets because they provide a large variety of middle and mass-market brands.

**-Digital influencers:** The influencers I follow the most are Enjoyphoenix, Sananas and Diotisdiaries.

**-When you think of influencer what comes to your mind:** travel, fashion, makeup, gifts, dream lifestyle

- "I love Enjoyphoenix and Diotisdiaries because I can relate to them. I have acne problems, and they always talk about how they used to have a lot of skin problems and acne, and always provides tips on how to clear these problems and how they got to over come them".

## **Appendix 7: Transcribed interviews (Translated from Arabic)**

- "I mostly follows influencers from France, because they provide a wide variety of tips and topics in a language that I do understand. Plus they are more simple and always make natural makeup looks videos."

- "When it comes to Tunisian influencers, I only follow Diotisdiaries because I feels she's the only relatable one and the most simple of all Tunisian influencers."

**-Brands and trends awareness not existing in Tunisia:** Urban decay naked palette, Too faced (chocolate bar), NYX Cosmetics and some pharmaceutical acne treatment brands I hear about from the French bloggers I follow but that are unfortunately either not available in Tunisian pharmacies or so expensive that my parents refuse to buy for me.

**-Brands online presence:** I only started following LELLA's page recently and I am starting to get interested in some of their products because Diotisdiaries is talking about them a lot recently and because I know their prices are very affordable.

### **2- Malek, 16, High school student:**

**-Makeup routine:** Currently I only use bb cream, mascara, eyeliner and nude lipsticks. I would love to use more makeup products on a daily basis but my parents do not let me and refuse to buy me more products. Other than these products I also use eye shadow and blush once and a while and in special occasions.

**-Brand preference:** My aunt bought me a great gift for my 16<sup>th</sup> birthday; an all-in-one makeup palette from Sephora that has several eye shadows, lipsticks and blushes. This palette is my favorite product. Other than that I only have a bb cream, mascara and eyeliner from Cecile. I know much more brands that I would love to buy and use but I can't as I don't have my own money and my parents think I am still too young to start using makeup on a daily basis.

**-Why you use makeup frequently:** Makeup boosts my confidence and makes me feel more beautiful. Especially when I use a high coverage bb cream or foundation that hides my acne.

**-Sources of info/inspiration:** beauty counselors and Youtubers.

\*beauty counselors: I trust them because they are experts and they know all the products and their advantages.

\* vloggers: Because I feel they are more honest they advice some brands and criticize some others; they provide better information on products and what goes and doesn't go with each skin type.

## Appendix 7: Transcribed interviews (Translated from Arabic)

- **Points of sale:** drugstore retailers and supermarkets because they provide a large variety of middle and mass-market brands

- **Digital influencer:** Enjoyphoenix, Sananas, Horia, Lufy and some other French and French speaking Canadian digital influencers

- **When you think of influencer what comes to your mind:** travel, fashion, makeup, gifts, and dream lifestyle.

I mostly follow influencers from France and Canada first because of the language convenience and because they provide a variety of tips and topics. I don't follow Tunisian influencers because I can't relate to any of them and I feel that they target an older audience. Plus, I feel that they are superficial and fake and not authentic. I feel they are just copying international bloggers. In my opinion, I feel that Horia, Sananas and international influencers create a more original content and that Tunisian bloggers only copy them. Moreover, in Tunisia being a blogger is a new trend, everybody is buying sponsored content and fake followers accounts to get a larger audience and then they pretend to be digital influencers.

-**Brands and trends awareness not existing in Tunisia:** Urban decay through the famous naked palettes featured in several Youtube videos.

- I only follow international brands' pages, no local brands. I don't see the point of, for example, following Lella's page on my social media. We all know their products since they haven't innovated for years and since they are of very low quality. (\*\* Author's note: *Lella have been innovating their products and packaging in the last 2 years*)

-**When asked if the reason she doesn't like or follow any local brand is because she only follows international bloggers she replied:** If our local products were good enough they would have been exported and international bloggers would be talking about them, just like products from other countries are being sold in Tunisia and talked about by Tunisian influencers.

- I don't base my choice only on what influencers recommend, I get inspired from them but then purchase products that go with my skin type and that are available in drugstores and are affordable so that my mother allows me to buy them.

- Most international makeup brands' posts on social media like Urban Decay or MAC Cosmetics make me dream of having those brands in Tunisia, testing them and buying them.

## Appendix 7: Transcribed interviews (Translated from Arabic)

*\*\*Author's note: I noticed a resistance towards local brands and influencers and lack of knowledge of the market, as for example she said she dream of seeing MAC products sold in Tunisia while in fact MAC has been available since 2007 and currently have 2 mono-brand stores in Tunisia.*

### **3- Sara, 18, High school student:**

- **Makeup routine:** The only products I use on a daily basis are either BB cream or liquid foundation, Mascara and Eyebrow pencil.
- **Brands preference:** My favorite brands are Wibo, Lovely and Essence. These brands have duplicates of most high-end products with a good quality and an ever better price.
- **Why do you use makeup frequently:** I use makeup because it makes me more satisfied with my looks and more comfortable in my own skin.
- **Points of Sale:** I buy my BB cream from supermarket. For other products I usually shop at store chains like Féerie when I am in Sousse because they have several stores around the city; and when I am in Tunis, where I study, I shop at Kisses because they have almost all the middle and mass-market brands available in Tunisia.
- **Sources of information/inspiration:** Facebook groups dedicated for girls and Instagram makeup profiles either of brands or of digital influencers.
- **When you think of digital influencers what comes to your mind:** Pink Trip (Raya Bouallegue). She's the first that comes to my mind when I think of digital influencers because she's a very nice, friendly and generates a lot of positive energy. Plus when she talks about products or gives information she provides it with a subtle and funny message. I never get bored watching her Snapchat or Instagram live stories. I also follow Vitaluna Spirit for the same reasons. She's a very simple and energetic girl. Plus it impresses me how she can balance between the very demanding medical studies and being a famous blogger.
- **Brands and trends awareness not existing in Tunisia:** I can't think of any brands or trends right now. My knowledge is basically restricted to brands available in Tunisia as I mostly only follow Tunisian makeup influencers and Tunisian Facebook groups dedicated to girly interests like fashion and makeup.
- **Local brands online presence:** The only one I do follow and that, in my opinion, has a great online presence is ELEGANT. Especially with the campaign they did a few months ago to launch their new liquid matt lipstick.

## Appendix 7: Transcribed interviews (Translated from Arabic)

### 4- Mariem, 19, High school student:

- **Makeup routine:** I always use liquid foundation, mascara, eyeliner, eyebrow pencil and blush.

- **Brands preference:** I use of a variety of brands but my favorites are Maybelline, Wibo, Lovely, Essence and Bourjois.

- **Why do you use makeup frequently:** I use makeup because it's part of our culture; everybody puts makeup on a daily basis. Plus as I am a blond, I feel that I look pale without any makeup on.

- **Points of Sale:** I usually buy all my products at Féerie. They offer a variety of affordable brands and they have a very good customer service. Plus their loyalty program provides a lot of advantages and discounts.

- **Sources of information/inspiration:** For information about products I follow makeup and beauty digital influencers on different social media platforms. For inspiration and to learn makeup application techniques, I go on Youtube and watch makeup tutorials.

- **When you think of digital influencers what comes to your mind:** Pink Trip (Raya Bouallegue) not because of her products recommendations or makeup or fashion tips; but mostly because she gives a charge of positive energies and makes me aspire to become like her when I grow older. I also think of Fatma Zahi (ZZFH/Street style Tunisia) because she's very classy and elegant.

- **Brands and trends awareness not existing in Tunisia:** It would take me a lot of time to name all the brands that I know and would like to use and see sold in Tunisia. Basically it's every brand that international digital influencers talk about in Youtube videos and that are not available in Tunisia; from affordable brands like Sephora products and NYX Cosmetics to expensive brands like Huda Beauty and Urban Decay.

- **Local brands online presence:** I think local brand are doing a very poor job in establishing an online presence. Lella has only created an Instagram account a few weeks ago I think. Then there is ELEGANT. They do a lot of efforts to promote their brand on social media but after testing their products I am very disappointed with the quality and thus no longer follow them.

## **Appendix 7: Transcribed interviews (Translated from Arabic)**

### **5- Lilia (French-Tunisian), 19, Medical student:**

- **Makeup routine:** The only products I use on a daily basis are matt lipsticks in nude and discreet colors, mascara and eyeliner. On special occasions or when I go out at night I would add to my routine makeup some blush, eyebrow mascara and sometimes eye shadow.

- **Brands preference:** my favorite brand is Sephora. As I don't put too much makeup on I don't see the point of buying expensive brands; and since I only shop for makeup abroad I always buy Sephora products. They offer a great quality-price ratio.

For lipsticks, all my lipsticks are from NYX Cosmetics; also for quality-price ratio reasons.

- **Why do you use makeup frequently:** For the matt lipsticks I use them because that has been the trend for the past two years almost. When it comes to the mascara and eyeliner, as I have Asian eyes I use them to make my eyes look bigger.

- **Points of sale:** As I said before it is Sephora France. That is the only place I buy makeup at every time I go and visit my family in Paris. I like Sephora for the quality of their services and for the loyalty program advantages.

- **Sources on information/inspiration:** Mostly my friends and beauty counselors at Sephora.

- **When you think of digital influencers what comes to your mind:** Chiara Ferragni on the international level and Fatma Zahi (ZZFH/ Street Style Tunisia) in Tunisia. I used to follow a lot Pink Trip (Raya Bouallegue) on Instagram and Snapchat because of how spontaneous and funny she is. But I think the more she got famous the more she lost her spontaneity and I feel she became less credible so I stopped following her. I also follow several international digital influencers on Instagram but mainly for fashion and lifestyle. When it comes to Tunisian influencers I see their posts on Facebook and Instagram since lots of my friends interact with them. But I don't follow any of them except for Fatma Zahi because I genuinely like her style. I feel that they are not very selective and none of them has a unique or precise style. They do a bit of everything; one day they're collaborating with a makeup brand, the next they are promoting a new restaurant or car brand; even for fashion I feel that they all dress the same.

The problem with makeup influencers is to this day I haven't managed to find anyone with the same features of my face. As you can see I have a fairly dark skin and very small Asian eyes and that is a very rare combination.

## **Appendix 7: Transcribed interviews (Translated from Arabic)**

Every time I look for makeup tutorials on Youtube to get makeup inspiration or to learn how to put eye shadow on my eyes I never find any look that suits me or that go with my taste. But still I find makeup tutorials very inspiring I just don't dare to experiment and try to see if they would suit my looks.

- **Brands and trends awareness not existing in Tunisia:** The products that I would like to see most in Tunisia are Kylie Jenner lipsticks. I unfortunately never had the chance to buy them in France either, they always sell out so quickly.

- **Local brands online presence:** The only brand that I noticed online ELEGANT with the buzz they made around their liquid matt lipsticks a few months ago. But as I am not a fast adopter of trends I never bought these lipsticks because they turned to be a scam; all my friends that bought them complained about the color pigmentation and about how they don't last long enough.

### **6- Zeineb, 19, High school student:**

-**Makeup routine:** liquid foundation, concealer for under-eye dark circle, powder foundation, eyebrow pencil, mascara, blush, lipstick and sometimes eyeliner. I also have several products like contouring palettes, highlighters, eye shadow palettes, glitter and fixing sprays. I've mastered how to recreate several makeup looks from Youtube tutorials and usually do this when I go out at night and for special occasions. When I have close family members weddings I go to beauty salons and get my makeup done professionally.

-**Brands preference:** My mom and older sister are as fond of makeup as I am, so they never refuse me to buy any product I want. For foundations and eye shadow palettes I use high-end brands like MAC, Makeup Forever and Urban Decay. For the rest of products I have a mix of all range of brands like Boujois, Sephora, KIKO, NYX Cosmetics, Lovely, Sleek, Wibo and many other brands.

-**Why you use makeup frequently:** Makeup is not only part of our culture but it's also very trendy. It's perfectly accepted in our society to go out with a full makeup look even in daylight or to go to school.

- **Points of sale:** I either shop at Féerie or my sister who lives abroad buy me products from Sephora every time she comes back home to visit.

-**Sources of information/inspiration:** My main source of information is my older sister; she's also the one who made me fall in love with makeup. I also follow several beauty bloggers on Instagram, Snapchat and on Youtube.

## **Appendix 7: Transcribed interviews (Translated from Arabic)**

**- When you think of digital influencers what comes to your mind:** “Nikkie tutorials” is the first one that comes to my mind. In my opinion, she’s the best beauty influencer out there. I also follow several other international makeup influencers both male and female like “Daisy Marquez” from the US, “Patrick Starr” and of course “Huda Beauty”.

I don’t rigorously follow any Tunisian influencers but I do follow Pink Trip, Fatma Zahi, Jess Narjess and Diotis diaries on Snapchat and I watch their stories once and a while.

**- Brands and trends awareness not existing in Tunisia:** It would take me hours to name all the brands and trends that I would like to see in Tunisia. The most favorite are Huda Beauty products, Anastasia Beverly Hills, Urban Decay, Benefit and every single brand available on Sephora US website. About trends, I would be extremely happy if bright lipstick colors like blue or fluorescent colors become a trend in Tunisia. I’ve been seeing international beauty influencers use them in their tutorials for several weeks now, but I wouldn’t dare be the first one in Tunisia to adopt this trend.

**-Local brands online presence:** Local brands only realized the importance of being present on social media a few months ago. When ELEGANT launched their liquid matt lipstick they created a huge buzz around the product, even before it’s launch. As that lead to the product being sold out within hours after it was launched, other brands started following them. Lella recently created an Instagram account that I heard about from Jess Narjess Snapchat story. It looks they are putting some efforts to create an online presence.

### **7- Sara (German-Tunisian), 20, Business school student:**

**- Makeup routine:** As my German mother isn’t very fond of makeup, I grew up to be like here. The only products I use on a daily basis are mascara and eyeliner to make my eyes look bigger.

**- Brands preference:** As I don’t buy my makeup in Tunisia, my favorite two brands are not available here; it’s Sephora and NYX Cosmetics.

**- Why do you use makeup frequently:** The main reason why I use makeup is to fit in society. I personally don’t like putting lots of makeup on; but I still do so that I don’t feel like the only outsider and the only person without makeup on.

**- Points of Sale:** I don’t remember if I ever bought makeup in Tunisia. I usually buy my makeup in Germany as I frequently go there, either from Sephora or from DM depending on the product and the brand.

## **Appendix 7: Transcribed interviews (Translated from Arabic)**

- **Sources of information/inspiration:** I sometimes watch makeup tutorial on Youtube to learn how to apply makeup. Though I don't have any specific Vlogger that I follow; whenever I want to create a makeup look I type in Youtube's search bar the look or products that I want to apply and watch tutorials. When it comes to information, I mainly get it from my friends or beauty counselors in stores.

- **When you think of digital influencers what comes to your mind:** I mainly follow some German, French and English speaking makeup influencers because I feel they go more with my taste. But when it comes to Tunisian influencers no name comes up to my mind. I do though see a lot of them on my Facebook news feed and on my Instagram "explore tab"; these come up mainly because my friends follow them and interact with them. I do watch their posts as well but don't necessarily remember any specific name. Another reason behind this is that I was born and raised in Germany until I turned 13 years old. Even though I do speak and Tunisian-Arabic I am still not comfortable with the language and when people speak fast I can't understand every thing they say. Therefore, I like following Germans and French because these are the two languages I am most comfortable speaking.

- **Brands and trends awareness not existing in Tunisia:** I rigorously follow the official account of Sephora and some other international brands like NYX cosmetics, Kylie Cosmetics, Urban Decay, Too faced and some other brands that are not very famous in Tunisia but that I do know and like from what I see in stores in Germany and from what international makeup influencers talk about. The reason why I follow these brands and these influencers is because the content these brands' social media profiles generate depicts more natural and simple makeup looks. I find the makeup looks that most Tunisian influencers and some other international influencers recreate are a bit extravagant for my taste.

- **Local brands online presence:** Honestly, as I never buy makeup in Tunisia I don't follow any of the local brands on social media. Though as everybody else living in Tunisia or who knows people from Tunisia, I noticed the buzz ELEGANT created around the launch of their liquid matt lipstick a few months ago. But that didn't raise my interest enough to go and buy the product or test; especially that after its launch people starting complaining about its quality.

### **8- Molka, 22, Architecture student:**

-**Makeup routine:** liquid foundation, blush, mascara, eyebrows mascara, and sometimes lipstick.

## **Appendix 7: Transcribed interviews (Translated from Arabic)**

I don't have many products because despite watching several makeup tutorials on Youtube I still didn't manage to learn how to apply makeup properly. For this reason, on special occasions I go to beauty salons to get my makeup applied professionally.

**-Brands preference:** Mostly it's middle and mass-market brands like Bourjois, Lovely, Wibo, Essence and Catrice.

**-Why you use makeup frequently:** I feel that my face looks dull without makeup; especially that everybody around me uses makeup on a daily basis.

**- Points of sale:** My favorite point of sale is Miracle because they offer competitive prices compared to other makeup stores. Plus they have all the middle and mass-market brands available in Tunisia.

**-Sources of information/inspiration:** My most important source of information is my best friend Nada. She's a makeup addict and a makeup expert. Whenever I want to buy something I ask her first. I also follow some makeup influencers on Instagram and Snapchat; and I love watching tutorials on Youtube because how perfectly some influencers can apply makeup really impresses me.

**- When you think of digital influencers what comes to your mind:** I only follow Pink Trip (Raya Bouallegue) and Fatma Zahi (ZZFH/Street style Tunisia) as beauty and fashion influencers. But, honestly, when I think of digital influencers the one that comes to my mind is Bilel Troudi, who's a Tunisian food blogger. There are some other Instagram profiles that I follow that post several tutorials from different international beauty influencers.

**- Brands and trends awareness not existing in Tunisia:** I don't have any specific brand or trend in my mind. We have a variety of middle and mass-market brands in Tunisia and that range of brands is what interests me the most. The only brand that I would really love to see in Tunisia is Sephora.

**-Local brands online presence:** I never pay any attention to local brands on social media as they don't frequently innovate their products range and because we see them in all super markets; so I feel like there's no need to follow them on the internet.

### **9- Farah, 22, Engineering student:**

**-Makeup routine:** liquid foundation, blush, eyebrow pencil and mascara.

- For night outs and special occasions I add to my routine powder foundation on top of liquid foundation to set the product for a longer period.

## **Appendix 7: Transcribed interviews (Translated from Arabic)**

I also use eyebrow mascara on top of eyebrow pencil to enhance the effect and because my eyebrows are so thin. Of course I also use eye shadows, and sometimes highlighter and contouring products.

**-Brands preference:** I prefer middle and mass-market brands. That allows me to buy more products in different shades and colors. The only product I buy from high-end brands is the powder foundation; my favorite is the compact powder from Dior.

**-Why do you use makeup frequently:** I hate looking at my face when I don't have any makeup on; it looks so pale that it gives me the impression that I am sick.

**- Points of sale:** If I am in Sousse my hometown, I buy from Féerie. If I am in Tunis where I study, I buy from Miracle, which is a huge middle and mass-market retail store that has almost all the brands available in Tunisia. The prices are also relatively cheaper than in other stores.

**-Sources of information/inspiration:** Facebook and Instagram.

**- When you think of digital influencers what comes to your mind:** Pink Trip (Raya Bouallegue). It's not for her makeup style, but when I think of digital influencers the first that comes to my mind is her. She has a great personality and she's very funny and spontaneous. Though she became more reserved now as she gained more followers from all age groups and has more influence. She mentioned it several times on her Snapchat story, she's restraining her self from being as spontaneous as she used to be because she had parents complaining from her behavior influence on their kids. What I also like about Raya is that she mostly recommends middle and mass-market brands, which are the brands I use. She talks to a wide target in Tunisia and everybody can afford the brands she recommends. Plus I have the impression that the more she talks about certain brands the wider they become available. For example, she vividly recommends the eye shadow palette from WIBO, which is the duplicate of the naked palette from Urban Decay; this brand used to be very hard to find; now almost all makeup stores around Tunisia are selling it. Another thing that I like about her, is that her opinions always feel honest. When she receives gifts and even when she collaborates with a brand, she never prizes the products but rather give her opinions about what she like using and omits to mention the ones she doesn't like; and that is sort of her way of saying she didn't like them without explicitly saying it in order to avoid problems with brands.

## **Appendix 7: Transcribed interviews (Translated from Arabic)**

I also follow some other beauty influencers on Instagram and Snapchat like Fatma Zahi, Jess Narjess and Dony MK. When it comes to international influencers I don't follow any but I frequently see tutorials and makeup looks on the "explore" tab in Instagram.

**- Brands and trends awareness not existing in Tunisia:** There are several international brands that I would love to use, though even if they would become available in Tunisia I am not sure if I would buy them because of how expensive most of them are. For example, Urban Decay, Too faced, Anastasia Beverly Hills, etc. The two brands that I would definitely buy if they do become available in Tunisia are KIKO and NYX Cosmetics. I actually have several shades of the matt liquid lipstick from the "Lingerie" line of NYX Cosmetics.

About trends, what I like now and would love if they also become available in Tunisia are glitter eyeliners and bright lipstick colors like the light blue or fluorescent purple colors.

Another trend is the colorful eyebrow mascara or the pastel colored eyebrows.

**-Local brands online presence:** The only two local brands I follow on social media are Lella and Kolsi. Though they don't have an impressive presence online. Lella started doing some efforts more recently but they still need to do much more.

### **10- Amira, 23, Physiotherapy student:**

**-Makeup routine:** liquid foundation, powder foundation, blush, mascara, eyebrow pencil and lipstick, usually in nude colors. For night outs and special occasions I also use eyeliner, eye shadows, glitter, highlighter and contouring products. When I have a close relative or friend's wedding, I usually prefer to go to a beauty salon to get my makeup and hair professionally done.

**-Brands preference:** All my makeup products are middle and mass-market brands. I have used before some high-end brands for foundation, but didn't see a big difference in quality. Thus why would I loose tons of money on one luxurious product, while with that same amount of money I can buy two or three products from a mass-market brand.

I don't have any specific favorite brand; I use different ones for different products.

**-Why do you use makeup frequently:** Because it makes me feel more confident and more attractive.

**- Points of sale:** I sometimes buy makeup from Sephora when I visit my sister who studies in Paris, or ask her to buy for me. In Tunisia, I usually buy either from Féerie or from Voluptée (a small makeup store).

## **Appendix 7: Transcribed interviews (Translated from Arabic)**

My favorite is Voluptée actually, because the owner of the store is my best friend's mother and thus she gives me great discount advantages. I can also buy there on a credit basis and pay in installments.

**-Sources of information/inspiration:** Mainly from the Facebook group "Street Style Tunisia" run by the blogger Fatma Zahi.

**- When you think of digital influencers what comes to your mind:** Pink Trip used to be my favorite digital influencer. But when she changed her style I lost interest because I felt like becoming famous compromised her spontaneity. I also frequently follow Fatma Zahi and Amina Minouch only Snapchat. I do though follow several international beauty and fashion influencers on Instagram; But I don't remember specific names.

**- Brands and trends awareness not existing in Tunisia:** Even though we already have several brands, there are still many that I would love to see available in Tunisia, especially NYX Cosmetics. When it comes to trends, I love the new bright lipstick colors trend. I really want to try a yellow or blue lipstick but I wouldn't dare do that now in Tunisia.

**-Local brands online presence:** I don't follow any local brands on social media and I don't think ever noticing them on any platform online. Though one of the reasons why I don't pay any attention to local brands online is because of products quality. The only brand I like is Lella for their good quality nail polishes.

### **11- Oumaima, 23, Pharmacy student:**

**-Makeup routine:** liquid foundation, setting powder for foundation, concealer for under-eye dark circles, mascara, blushes, eyebrow pencil and lipstick. I also use eyeliner and eye shadow when I got out at night and for special occasions. Also for relatives weddings I usually get my makeup done at beauty salons.

**-Brands preference:** Most of my makeup products are from middle and mass-market brands like Bourjois, L'oréal and Essence.

**-Why you use makeup frequently:** I still have some blemishes and scars from teenage acne and I also have very dark circles under my eyes thus I use makeup mainly to hide that and to feel more comfortable in my own skin.

**- Points of sale:** I mainly buy my makeup at Féerie because they have a variety of middle and mass-market brands, or at small perfumeries (drugstore retailers).

## **Appendix 7: Transcribed interviews (Translated from Arabic)**

**-Sources of information/inspiration:** From my friends, word of mouth and some beauty influencers that I follow mainly on Snapchat.

**- When you think of digital influencers what comes to your mind:** Pink Trip (Raya Bouallegue) and Fatma Zahi (ZZFH) are the first one that come to my mind.

I also love following Mayssa Ferchichi the travel blogger on Snapchat for all the interesting stuff she shows on her travels. There's another beauty influencer that I like, her name is "Velours et Chocolat". She's a Tunisian living in Canada. I love her style and how she talks about brands and products. But she's not always relevant for me as some of the makeup products she talk about, like Urban Decay and Too Faced, are not available in Tunisia. Among all these, for information about makeup, I follow Pink Trip the most, because she uses all the products that I love using. I also follow Huda Beauty and some other international beauty influencers on Instagram; but I don't remember their names.

**- Brands and trends awareness not existing in Tunisia:** Benefit; even though I know their products are very expensive, I still love that brand and I would love to have it in Tunisia. Also Sephora and NYX Cosmetics; I'm pretty sure if these brands would open in Tunisia they would make a huge success, as a lot of people already know about all their products and always try to find ways to buy them either by asking whomever they know lives abroad or when they travel themselves. Urban Decay is another brand that most Tunisians know about.

**-Local brands online presence:** I think the only local brand with a decent online presence is ELEGANT; and this only started a few months ago when they launched their new matt liquid lipstick.

### **12- Salma, 24, Graphic design student:**

**-Makeup routine:** I basically do a full makeup look everyday. I use liquid foundation and then set it with powder foundation. Then I apply eyebrow pencil and matt eye shadow in nude colors. I also put mascara, blush, highlighter, bronzer and both lip pencil and lipstick. For special occasions and night outs I do the same makeup routine but use more extravagant colors and put more highlighter for a more glowing effect. I also sometimes do contouring. Then for close family members' weddings, I usually go to beauty salons for a more perfectly applied makeup.

**-Brands preference:** I use a variety of brands. Mostly, for every day make up, I use middle and mass-market brands like Catrice, Artdeco, Makeup Revolution and Sephora.

## **Appendix 7: Transcribed interviews (Translated from Arabic)**

When I have a special meeting or occasion I use professional makeup brands and more high end products like Urban Decay, Makeup Forever and NARS. I also have the full collection of the long lasting matt liquid lipstick of Sephora because it's my favorite matt lipstick.

Moreover, I have almost every single product of the brand Benefit, because my aunt is the brand manager in Dubai so she always bring me testers whenever she comes home to visit.

**-Why do you use makeup frequently:** Makeup covers flaws and makes your face look more healthy and glowing. It also makes me feel more confident and beautiful.

**- Points of sale:** I don't have a favorite point of sale. I indulge in compulsive makeup buying; sometimes I even feel that I might be a makeup addict. Whenever I am free and wondering around in the streets and pass by a makeup store, I would go inside and buy something. But when it comes to expensive products from high-end brands, my aunt also buys them for me from Sephora Dubai.

**-Sources of information/inspiration:** I rigorously follow beauty bloggers on Facebook, Instagram, Youtube and Snapchat. I follow so many makeup influencers that I can't count. They are my source of inspiration and information for every product that I use or think to buy.

**- When you think of digital influencers what comes to your mind:** Definitely Huda Beauty is the first influencer to come up to my mind. In my opinion she is the greatest beauty blogger that ever existed. She managed to build an empire and very successful business out of almost nothing. I love how diversified her Instagram posts are, how professional her videos and makeup tutorials are and also how her blog posts on her website are well written and very informative. I also follow several other international beauty influencers from the videos and tutorials that Huda beauty posts on her Instagram account. Also, when I watch a video of Huda Beauty on Youtube, I usually pay attention to the suggested videos. However, I don't quite remember any specific name. Also, for example if I am looking for a makeup tutorial for the eyeshadow palette "NAKED" from Urban Decay, I just type down on YouTube "Naked palette makeup tutorial" and I will have several videos for using that specific beauty product. There is also the Lebanese digital influencer Farah Abdel Aziz, one of the sisters that are the Arab version of the Kardashians family; she recently started doing makeup tutorial videos on Instagram. They are really good. When it comes to Tunisian influencers, I follow almost all of them. My favorites in terms of makeup are Rania Macnee, Rym Khouja, Jess Narjess and Olfa Cotton curves.

## **Appendix 7: Transcribed interviews (Translated from Arabic)**

They always go straight to the point and can easily convey the message, directly without distractions. They also look the most authentic; they would tell you if they tried something and didn't like it. Also their Snapchat stories and how they share their beauty routine makes me feel closer to them. It is not like just posting one video each month on Youtube or only posting pictures on Instagram or Facebook. I follow several other Tunisian influencers but some of them feel like they are just doing advertisements for brands. It would be also very interesting if they put more efforts in getting into direct contact with their followers, like through organizing meet ups more often, that would increase their credibility.

**- Brands and trends awareness not existing in Tunisia:** Even though the makeup market in Tunisia is quite developed, we still lack several brands like NARS, Benefit, Urban Decay etc. They are massively used in the makeup tutorial videos and it would be easier if we had them available in Tunisia. About trends there's a new trend I noticed on Instagram that is using glitter or bright mascara colors on eyebrows; I liked several of the looks I saw but I wouldn't dare try them in Tunisia as it's a bit extravagant and maybe people wouldn't like it. I also would love it if dark lipstick colors, like Navy blue or black, become a trend in Tunisia.

**-Local brands online presence:** Let's first talk about international brands, for example Make Up Forever, I was not aware that they are available and sold in Tunisia for years. I only heard about their presence through digital influencers when they invited them to their new makeup academy and new store opening. Why wouldn't they invest time in Facebook and Instagram and create content dedicated and relevant to the Tunisian consumers. Then for the few local brands who already have, more or less, an online presence, I feel that they are not making enough efforts. They should not only post pictures in a non- frequent and unorganized manner; they should be more creative. For example, they can create some videos on Instagram to show us how to use the products.

### **13- Nada, 25, Interior design student:**

**- Makeup routine:** I have a very developed makeup routine. I apply liquid and powder foundation, very light and nude shades of eye shadow, eyebrow pencil, mascara, blush, highlighter, lip pencil and lipstick. I also have all the products that you could ever think about; from different eye shadow palettes and highlighter and contouring palettes, to setting powders for foundation and several shades and types of lipsticks. I also have different brands in each makeup product; for example I have 3 different liquid foundations.

## **Appendix 7: Transcribed interviews (Translated from Arabic)**

I am very passionate about makeup. Every time I am going out at night or when I have a special occasion, I go all crazy on my face. I've watched so many makeup tutorials on Youtube that I mastered how to perfectly apply makeup like makeup artists do. I used to go to beauty salons for special occasions like wedding but for the last two years almost I haven't gone to any as I can do the same job as they do on my own face. I even apply makeup on my mother and friends for special occasions.

- **Brands preference:** As I said earlier I have at least two different brands in each product. It's always one high-end brand and one middle or mass-market brand. The middle and mass-market brands I use them for everyday makeup and the high-end and professional brands I use them for night makeup and special occasions. Sometimes I mix products also. For example, I have a great MAC liquid foundation that I bought in the summer while I was tanned so it's darker than my actual skin tone; when I use it in winter I mix it with a Bourjois foundation in a lighter shade to get the tone that matches my skin and that makes a perfect combination. All my pocket money goes on makeup. Sometimes I even ask my parents for money to buy clothes and then end up spending it on makeup products.

- **Why do you use makeup frequently:** It's part of our culture and all the girls I know use makeup on a daily basis. Some put fewer products than others; but as I am very passionate about makeup I always do a full makeup look.

- **Points of sale:** My favorite is Miracle because I have a 20% discount there with my loyalty card and because they have cheaper prices than other stores. Another great thing about Miracle is they have all the middle and mass-market brands available in Tunisia. I also like Féerie for the same reasons. Then there is point M, Pretty woman and the brand's stores like MAC and Makeup Forever stores. I also buy products from Sephora everytime I get the chance to travel.

- **Sources of information/inspiration:** I think I have watched every makeup tutorial available on Youtube and Instagram. That is my main source of inspiration and my own version of a makeup academy. I have learnt so much from these videos. But as usually they only mention or show the products but don't provide information on their prices or where they are sold, I look for these information on the Internet and on Facebook.

- **When you think of digital influencers what comes to your mind:** Huda Beauty and many other international beauty influencers on Instagram and Youtube. I only remember Huda Beauty's name because she has her own brand.

## **Appendix 7: Transcribed interviews (Translated from Arabic)**

The other they became so many that I can't think of the names now. But if you take a look on my Instagram account it will be 90% makeup posts and tutorials. I also follow the Tunisian beauty influencers because it's a trend to follow them. But, the only ones that I genuinely like are Fatma Zahi (ZZFH/Street Style Tunisia) and Rym Khouja. The other I feel that they are not very authentic and trust worthy. They recommend dozens of brands about the same product in one day, which makes it so obvious that they either received as a gift from the brand or that they are being sponsored.

**- Brands and trends not existing in Tunisia:** There are so many brands that I would like to see in Tunisia that I couldn't count. It basically Sephora and all the products that it sells in the US. NYX Cosmetics is also one of my most desired brands, especially their "Lingerie" liquid matt lipstick line. There's also so many trends that I would like to see in Tunisia; like the "Strobing" trend of putting highlighter in different areas on the face or the fluorescent blue or purple colors.

**- Local brands online presence:** Compared to international brands there's no point of comparison. Local brands need to massive efforts to build a decent online presence. Except for ELEGANT with the launch of their liquid matt lipstick; and still that's nothing innovative.

### **14- Mouna, 25, Student in dental medicine:**

**-Makeup routine:** liquid foundation, concealer for under-eye dark circles, mascara, eyebrows mascara, bronzer and lipstick. I also have several other makeup products from eye shadow palettes to contouring and highlighter palettes. These products I use them to create full makeup looks when I got out at night or when I have a special occasion like weddings or birthday parties etc.

**-Brands preference:** I have so many brands. I have my brand's preference for each type of product. For example, for foundation, I only trust luxury or professional brands and my favorite is the long lasting liquid foundation from MAC. But for products like lipsticks and pencils, it doesn't bother. The effect and quality are not so different, so I rather buy from cheap brands so that I can buy a bigger variety of colors and products.

**-Why do you use makeup frequently:** I am very passionate about makeup. When school gets so overwhelming sometimes I wish I could just give up medical studies and become a makeup artist.

## **Appendix 7: Transcribed interviews (Translated from Arabic)**

- **Points of sale:** Usually I send products references to my brother who works in London and he would buy the products for me and he would bring them for when he comes home or send them with whoever is travelling from London to Tunisia. But for cheap products from middle and mass-market brands I buy them in Tunisia. Féérie is my favorite stores chain. They have all the products available in Tunisia. There's also Miracle, but they only have a store in the capital city and I don't often go there. Only sometimes when a product is sold out in Féérie and I urgently need it, I would go to Fatales; but I don't like it as much as the two other shops because they don't have a big variety of brands I like and I also don't like the way their beauty counselors interact with customers.

-**Sources of information/inspiration:** For information, I look at product reviews on the Internet, and also bloggers. But I prefer to try products by myself though; what goes with your skin type will not necessarily go with someone else's' skin and face.

For inspiration I frequently and rigorously follow several beauty influencers on different social media platforms.

- **When you think of digital influencers what comes to your mind:** Farah Dhukai, she is an international beauty influencers. I love her makeup style and also she has the same skin tone as I do. I also love the grandma recipes for natural home made masks for skin care. I also follow Huda Beauty, Sananas and several other famous beauty influencers. I follow them because of the makeup tips they give us, and to have an idea about what is trendy and what is not. They also represent a great way to learn how to better apply makeup products. I also follow Fatma Zehi, Raya Bouallegue, Vitaluna Spirit and several other Tunisian influencers. My favorite is Fatma Zehi, because she is more elegant than the others and her makeup is always so nicely and perfectly applied. She has also a bold fashion style. I wouldn't wear the same clothes as her, but I admire how she takes risks with her style. When it comes to Vitaluna Spirit, I mainly follow her for her lifestyle, as she is also a medical student, and not necessarily for makeup inspiration.

- **Brands and trends awareness not existing in Tunisia:** Sephora, Too faced, Benefit, Urban Decay, Anastasia Beverly Hills and many more brands. We need to bring them to Tunisia, because the biggest influencers like Huda beauty or Farah Dhukai use them. These brands have good and trendy products with unique colors and a great texture that you don't find in other brands in Tunisia. When it comes to trends I really like the new trends of glittery eyebrows and metallic colors of lipstick.

## **Appendix 7: Transcribed interviews (Translated from Arabic)**

**-Local brands online presence:** I follow the global account of brands, but also the local ones that have good and interesting feed. If they just post pictures of products, then they are not interesting enough to follow; and that is the case of most local brands. They just post pictures; meanwhile, the international brands make more effort in providing makeup tutorials, etc. I also started following Elegant because it has new interesting products. The brand is serious about its digital marketing strategy. When they launched their liquid matt lipstick a few months ago, they started promoting the product through Facebook groups like “Street Style Tunisia” and offered it to all digital influencers in Tunisia before the launch. That created a huge buzz and made everybody so eager to buy the product that it kept on selling out every time the stores get a new stock for nearly 6 weeks after the launch. I personally signed up on a waiting list at a local para-pharmacy that was selling them and only got the references I was looking for after 2 weeks of waiting.

### **15- Wafa, 26, Interior designer:**

**-Makeup routine:** I can imagine living without the concealer for under-eye dark circles. I also use liquid foundation, powder foundation, mascara, blush and lipstick.

When I go out at night or for special occasions, I also use eye shadow, eyeliner, highlighter and sometimes contouring as well. I don't like going to beauty salons though because I feel that when I apply my own makeup it always suits my face morphology better when someone else applies it for me.

**-Brands preference:** I use a mix of middle and mass-market brands. I don't have any brands preference, it depends on the product and with trial and error of what goes and doesn't go with my skin type.

**-Why do you use makeup frequently:** For me it's a psychological need. I feel that my dark circles are so bad and noticeable and the face looks weird if you just apply concealer. That is why I use all the products I mentioned in my routine. Moreover, in Tunisia everywhere you go girls have perfect makeup on, so it's also because it's part of our culture.

**- Points of sale:** Féerie is my favorite point of sale because it offers the largest variety of middle and mass-market brands. Plus it happened to me that I bought a perfume from Fatales around 5 years ago and it turned out to be counter-fit; from that day I don't trust them anymore. I also have a cousin that works as a beauty counselor in one of Féerie stores and she always reassure me of the authenticity of their products.

## **Appendix 7: Transcribed interviews (Translated from Arabic)**

**-Sources of information/inspiration:** My main sources of inspiration for makeup are Makeup tutorials on Youtube

**- When you think of digital influencers what comes to your mind:** Pink Trip (Raya bouallegue) is the first that comes to my mind. Through her energy and funny personality, she managed to capture the attention of a lot of people in Tunisia from all gender and age groups. Although she doesn't have a special style in makeup or fashion, I still follow her frequently on Snapchat, Instagram and Youtube. I also love Fatma Zahi (ZZFH/Street style Tunisia). I love her bold fashion style and her classy and subtle makeup looks. Moreover, I am member in the facebook group "Street Style Tunisia", so I get every new information that has to do with makeup products and trends in Tunisia; and I follow almost all Tunisian influencers on Instagram and Snapchat. My favorite international beauty influencer is Sandra; she's from the US and I rigorously follow her Instagram account and her Youtube channel. I also follow several French beauty influencers on Youtube and Instagram like Sananas and Enjoyphoenix. In my opinion, makeup tutorials that influencers post on Youtube are very informative and make a great way of learning how to apply makeup. I gained a lot of knowledge about makeup products and their application techniques through these videos.

**- Brands and trends awareness not existing in Tunisia:** There are several brands that I would like to see in Tunisia like Benefit and Urban Decay. For trends, I like the new "strobing" trend; that is putting lots of highlighter in different areas of the face to give it a fantasy glow. In Tunisia, people are still very conservative about highlighter; they only apply it on the upper part of cheeks and in very small amounts.

**-Local brands online presence:** The only brand with a noticeable online presence is ELEGANT. Though they only created a buzz a few months ago with the launch of their new liquid matt lipstick. That was very impressive and how they managed to sell the brand is something new in Tunisia and no other brand thought of doing it before. But I tried that product and was very disappointed of the quality.

### **16- Mariem, 27, Strategic marketing officer at a bank:**

**- Makeup routine:** My daily routine consists of using mascara, highlighter and lipstick. I sometimes also use eyeliner. For night outs and special occasions, I use foundation, both liquid and powder, blush, eye shadows and lip pencils.

## **Appendix 7: Transcribed interviews (Translated from Arabic)**

- **Brands preference:** All my lipsticks are from MAC Cosmetics; it's my favorite. My foundation is also from MAC because I used to have acne problems and thus I'm very meticulous about the products I apply over my skin. The products that I use daily are all from professional and high-end brands. While the products I use less often are from cheaper brands like L'oreal, Maybelline etc.

- **Why do you use makeup frequently:** I use make up to feel that I take care of myself and that I am not neglecting my beauty. It is both cultural and psychological. The cultural side comes from the socialization process. I grew up in a society where we see our moms and aunts using make up everyday. There is a beauty salon or hairdresser in every corner. The psychological side has to do with my fast paced life, the stress and the fatigue makes the face look pale and dull; so I like to hide that with makeup. Moreover, the advertisements that portray perfect faces that we all unconsciously would like to have. Why would a woman in a yogurt advertisement have a red lipstick? That image is deeply ingrained in our subconscious making us feel we should look good at any circumstance. This cultural impact didn't change even when I studied abroad in several continents. I remember the semester I spent a year ago in Thailand, my school mates used to look at me in a weird way because of putting makeup daily; that didn't impact me at all and I didn't change my habits.

- **Points of sale:** When I travel I only buy makeup at Sephora because in my opinion they offer a great customer service and a variety of products. When in Tunisia, I either shop at MAC stores or at the makeup retail chain Fatales.

- **Sources of information/inspiration:** For information I follow some makeup digital influencers and my brands social media accounts. When it comes to inspiration, my favorite beauty icon is Beyoncé. I also look up to several celebrities like Rihanna and Kim Kardashian; mainly because I share the same skin tone as them. I also love watching makeup tutorials on Youtube to see the whole process of creating makeup looks and to learn how to better apply the products I have. I don't have a specific Youtuber that I follow, but I choose the videos based on the number of views and the products used in the tutorial.

- **When you think of digital influencers what comes to your mind:** Rym Khouja, because she's my neighbor and we used to go to school together. That proximity and the fact that we are friends make me trust her opinions and her recommendations. I don't rigorously follow any other makeup influencers from Tunisia. But I do follow Fatma Zahi (ZZFH/Street Style Tunisia) because I love her fashion style.

## **Appendix 7: Transcribed interviews (Translated from Arabic)**

I also follow several US beauty influencers on Instagram, but no specific name is coming up to my mind right now. The reason why I follow US beauty influencers is because I believe the US makeup market is a lot richer and wider than in Tunisia; therefore people are more knowledgeable about brands, products and especially trends.

- **Brands and trends awareness not existing in Tunisia:** For brands it would take me lots of time to name all the brands that are not sold in Tunisia and that I would like to see. This is one of the reasons that make me indulge in massive shopping when I go to Sephora. When it comes to trends I really like some untraditional ways of applying eyeliner. I also love the blue, black or purple lipsticks trend; though I don't think men in Tunisia would appreciate this trend. In a society where makeup is overused people prefer to see more subtle and natural colors to not be too extravagant.

- **Local brands online presence:** I have no interests in Tunisian brands and thus I don't follow any on social media and I don't pay attention to their activity on the Internet. Except for Lella because of their cheap and relatively good nail polishes.

### **17- Safa, 29, Junior manager at a real estate development company:**

- **Makeup routine:** liquid foundation, mascara, blush and lipstick. For special occasions and when I got out at night, I use eyebrow pencil, eye shadow, eyeliner, eye pencils, lip pencils and sometimes contouring and highlighting products. Also, for family or close relatives weddings I also go to a beauty salon or makeup artist to get a full professional makeup done.

- **Brands preference:** I alternate between all ranges of products. I have all sort of brands from mass-market like Bourjois and Maybelline, to middle market like Lovely and Wibo, to high-end brands like Chanel, MAC and Makeup Forever. My strategy is I use the middle and mass-market brands for every day makeup; and when I go out at night and for special occasions I use the more professional and expensive products.

- **Why do you use makeup frequently:** First because it's trendy to put makeup on a daily basis and second because I feel it breaks my routine and make me feel more special.

- **Points of sale:** For high-end brands I usually buy them when I travel from Sephora. For everyday makeup products, I usually shop at Féerie because they offer a large variety of products.

- **Sources of information/inspiration:** Mostly it's beauty counselors in stores because they offer a tailored service according to your needs and budget.

## **Appendix 7: Transcribed interviews (Translated from Arabic)**

I also sometimes look for information on different social media platforms and on the Internet. But mostly it is for inspiration or to learn different makeup application techniques, especially from beauty influencers on Youtube. I love watching makeup tutorials on Youtube and trying to recreate the looks on myself, even though it rarely turns successful.

- **When you think of digital influencers what comes to your mind:** Pink Trip (Raya Bouallegue) mostly because I feel she give a boost of positive energy through her funny and spontaneous personality. But also because all the products she uses and recommends are available everywhere in Tunisia. I also follow almost all Tunisian influencers on Snapchat. I feel that what their share on Snapchat is a very easy and convenient way to learn about all products trends and about newly launched brands and stores openings.

- **Local brands online presence:** I experimented with local brands when I was younger and never liked the quality of their products. Thus I don't follow any of them on social media. The only brand that I noticed online was ELEGANT when they launched their new liquid matt lipstick; and this was only because I am a member in the Facebook group "Street Style Tunisia".

### **18- Ines, 30, Banker:**

- **Makeup routine:** Liquid foundation, eyeliner, eyebrow pencil, mascara, blush and lipstick. For special occasions and when I go out at night, I also use powder foundation, concealer for dark under-eye circles, eye shadow, lip pencil and sometimes contouring and highlighter.

- **Brands preference:** I have a mix of all range of brands. I use the high-end brands for nights and for special occasions. The ones I currently have are MAC, Makeup forever and Yves Saint Laurent. For everyday day makeup I use middle and mass-market brands like Bourjois, L'oreal, Maybelline, Lovely, Artdeco and Essence.

- **Why do you use makeup frequently:** It makes me feel more comfortable in my own skin. Without makeup I feel like my face is as pale as when I am sick.

- **Points of sale:** For MAC and Makeup Forever I buy them at their stores since that's the only place they are sold. For Estée Lauder, Bobbi Brown and Clinique products I buy them at Pretty woman because, if I am not wrong, that's the only store chain where they are sold. For the rest, I always go to Féerie; it has a variety of high-end brands like Dior and Chanel, and all the middle and mass-market brands available in Tunisia.

- **Sources of information/inspiration:** Before my main source of information used to be beauty counselors in stores and through products experimentation.

## **Appendix 7: Transcribed interviews (Translated from Arabic)**

Then about a year ago, I heard about beauty influencers from my friends and entourage. Now instead of losing money on buying products and ending up not liking them, I go on Facebook groups like “Street Style Tunisia”, Instagram and Youtube to look for information about trendy brands and products. I was also impressed when I discovered the makeup tutorials on Youtube and Instagram. I use them now as a source of inspiration and to learn how to better apply makeup.

- **When you think of digital influencers what comes to your mind:** Huda Beauty and Farah Dhukai are my favorite beauty influencers. I also follow several other beauty influencers on Youtube, but I can't think of names now. I mainly discovered them through the suggestions that show up on Youtube when I watch Huda Beauty and Farah Dhukai videos; then I subscribed to their channels and now all their videos automatically show up on my Youtube's welcome page. For Tunisian beauty influencers the one that I follow the most is Your Ferjani, who's a Tunisian beauty Youtuber based in Paris. I also follow Diotisiaries; I like her style and her makeup tutorials are very explicit and easy to follow.

- **Brands and trends not existing in Tunisia:** There are several brands like NARS, Urban Decay and NYX Cosmetics that all international beauty influencers use in their makeup tutorials and thus make me dream of having the opportunity to use them. There are several trends I see on Instagram and Youtube videos, but some of them are too extravagant in my opinion and wouldn't be that successful in Tunisia.

- **Local brands online presence:** The only two brands I can think of with an online presence are Lella and ELEGANT. Though they only started being active on social media in the last few months; so I think they still need to do a lot of efforts to build a presence as strong as international brands.

### **19- Hager, 32, Housewife:**

- **Makeup routine:** What I use on a daily basis are concealer for dark eye circle, powder foundation because it feels lighter than liquid foundation, blush, mascara, lip pencil and lipstick. For special occasions I add to my makeup routine some eye shadow and eyeliner. I also used to put eyebrow pencil or mascara; but recently I did micro-blading tattoo so I no longer need to use this product. Moreover, when I have a close friend or relative wedding, I go to beauty salons to get a professional makeup done.

## **Appendix 7: Transcribed interviews (Translated from Arabic)**

I would love to do that more often if the prices were more affordable; but unfortunately in Tunisia makeup artists prices are getting more and more expensive every year.

- **Brands preference:** Most of my products are middle or mass-market brands. The only product I invest in and only buy in high-end brands is foundation. My favorite foundation is MAC Cosmetics and my favorite middle market brand is KIKO.

- **Why do you use makeup frequently:** I didn't use to put as much makeup as now, especially when I used to live in France; but that has nothing to do with trends. I recently dyed my hair grey-blond and that makes the face look pale, thus I developed a makeup routine to brighten my face a little bit.

- **Points of Sale:** I either go to mono-brand stores when I want to buy MAC or KIKO products, or shop at super markets or Sephora whenever I go to visit my husband who still resides in France; or I send him the list of products that I want with the appropriate color references and he would bring them for me every time he comes to visit. My favorite point of sale is MAC Cosmetics. In my opinion they have the best customer service among all brands and stores that I ever shopped at.

- **Sources of information/inspiration:** Facebook groups dedicated for girls, Instagram and my friends.

- **When you think of digital influencers what comes to your mind:** Huda beauty is my favorite digital influencer. I also follow some other gulf countries based influencers like Balkiss and Marmar. I feel that they have a very classy style. They also perfectly balance between sport-chic styles and sparkly and extravagant styles. I also follow some other international influencers; my favorite is a Swedish influencer called Western life.

- Brands awareness not existing in Tunisia: Most of the brands that I like are already available in Tunisia except for KIKO.

- **Local brands online presence:** I usually only see posts about local brands in the Facebook groups for girls, mainly in the group "Street Style Tunisia" that is run by the blogger Fatma Zahi. I'm also impressed by ELEGANT online presence and mostly by Nihel, the owner of the brand. In my opinion, she managed to build a strong image for her brand through her personal style, her fun and spontaneous personality and her very modern and chic style. I also like the efforts they did in the last years to improve their products quality. LELLA also recently started following the same path as ELEGANT when they saw the success they made by being active and creating a buzz around the launch of their liquid matt lipstick.

## Appendix 7: Transcribed interviews (Translated from Arabic)

### **20- Amina, 33, Quality management Consultant:**

- **Makeup routine:** The most important step in my makeup routine is concealer for under-eye dark circles; then, blush, mascara, eyebrow pencil and lipstick. For night outs and special occasions I also apply liquid foundation, eye shadow, eyeliner and either contouring or bronzer. But I am not very good at it; my makeup usually ends up looking a bit messy. That is why whenever I have an important event like a family wedding I go to beauty salons to get my makeup professionally applied.

- **Brands preference:** I mostly only use high-end brands like Bobbi Brown, Estée Lauder and Urban Decay. The only product I buy in middle and mass-market brands are lipstick to have a wider variety of colors and textures.

- **Why do you use makeup:** to look fresh and healthy and to have a glowing skin.

- **Points of sale:** I mostly shop at Sephora or duty free shops as I travel frequently with work. Best point of sale is Sephora. Its beauty line is good, and has most of the brands, the staff will help you find the perfect product for your skin, and let you try it first. It is also convenient, as it is present in every shopping area abroad. The reason why I don't shop in Tunisia is first with all the illegal imports issues we have I don't trust the local stores that much; and also because makeup is much more expensive than it is at Sephora.

- **Sources of information/inspiration:** Mostly digital magazines: Vogue, Harper's Bazaar, Coveteur, Byrdie. I also follow some Channels on YouTube; mainly British Vogue and "the beauty secrets" playlist in other Vogue channels.

- **When you think of digital influencers what comes to your mind:** Supermodels and their presence on social media (Instagram + Youtube): Kendall Jenner, Bella Hadid, Gigi Hadid, Karlie Kloss, etc... I also know most Tunisian digital influencers but I don't follow them frequently. I take a look at their Instagram accounts and Snapchat Stories sometimes, just because everyone I know is following them and they are a trendy discussion topic in Tunisia.

**Brands' awareness, not existing in Tunisia:** Too faced, Benefit, Urban Decay, I love their packaging, especially Benefit. Even if it's not made with natural components, it looks natural on the skin, and gives the fresh look I like.

**Brands' online presence:** I think that local brands digital marketing strategy is not effective. I'm not following them and never checked their social accounts as I have never seen or heard anything attractive enough to catch the attention of people who don't have enough makeup knowledge.

## Appendix 7: Transcribed interviews (Translated from Arabic)

### 21- Zeineb, 34, Housewife:

**-Makeup routine:** Liquid foundation, eyeliner, mascara, eyebrow pencil, blush and lipstick. I also have some eye shadows, powder foundation and concealer for under-eye dark circles. But I rarely use them. I always go to my mother who has a beauty salon and she does my makeup there every time I am going out at night or when I have special occasions.

**-Brands preference:** I would love it if I can afford buying high-end and professional brands. That's is why at every occasion I have I go and do my makeup at my mother's salon because she has good products like Makeup Forever and MAC. But as I can't afford to buy expensive makeup, since I am unemployed and my husband doesn't make a lot of money as well, I only buy my foundation from MAC. All the other products I have are from mass-market brands like Lella, Bourjois, Rimmel and Maybelline.

**-Why do you use makeup frequently:** First it makes me more comfortable in my own skin and second it's my mother's influence. Since I was a kid I used to spend a lot of time at her salon and thus I grew fond of makeup.

**- Points of sale:** I always buy from small perfumeries (drugstore retailers) because they have competitive prices in mass-market brands compared to the stores chains like Féerie or Fatales. I have a specific one that I buy from: it's a small store in my city that sells makeup in bulk prices; I only get this advantage because I go there with my mother and she has her professional makeup artist card that gets her discounts.

**-Sources of information/inspiration:** Mostly it's my mother and the girls who work with her at the beauty salon; but also Facebook groups dedicated for girls like "Street Style Tunisia" and Instagram.

**- When you think of digital influencers what comes to your mind:** I don't specifically follow any beauty influencers on social media. But in the group "Street Style Tunisia" almost all Tunisian beauty and fashion influencers share their posts from their pages and Instagram accounts on that group since I think it's the biggest group dedicated for Tunisian girls of Facebook. That's how I know them. I guess since I press "like" and comment their posts in that group frequently, I also get to see their posts in the "explore" tab on Instagram. But I never thought of following them and looking at their personal accounts since I can see their content organically in my news feed on Facebook and as I said earlier in the "explore" tab in Instagram.

## **Appendix 7: Transcribed interviews (Translated from Arabic)**

**- Brands and trends awareness not existing in Tunisia:** The only brand I can think of right now is Sephora. Last year, my mother in law offered me an all-in-one palette from Sephora that has several shades of eye shadow, blush, lipstick and eyeliner. I really love the quality of the product and would like to be able to buy from it more. From what I know too, Sephora products are not very expensive and thus I am sure they would make a good success in Tunisia.

**-Local brands online presence:** As I said before I am not very active on social media and thus I don't follow any brands.