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

REACHING GEN Z SKINCARE CONSUMERS IN PORTUGAL: HOW CAN MYCLARINS DEVELOPED ITS EDUCATIONAL CONTENT?

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Group Part

Abstract

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

Keywords

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

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1. Introduction

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

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

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

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

2. Contextual Background

2.1 Market Overview

The global beauty industry encompasses skincare, color cosmetics, fragrance, and hair care categories (BoF and McKinsey & Company 2023). Despite economic turbulence, this industry has proven to be extremely resilient and is expected to grow at a CAGR[1] of 6% until 2027, recording over $580 billion in retail sales (BoF and McKinsey & Company 2023). This growth is expected to be primarily driven by the skincare category, the largest category comprising 45% of the industry's total market value (BoF and McKinsey & Company 2023). This category is anticipated to grow from $190 billion in 2022 to $260 billion by 2027 (BoF and McKinsey & Company 2023).

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

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

2.2 Generation Z

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

[1] Compound Annual Growth Rate.

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

2.2.1 Generation Z Consumer Behavior & Preferences

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

Firstly, to Gen Z, transparency and authenticity are indispensable when it comes to the way brands communicate their offer and underlying processes. Unlike millennials, Gen Z is *"demanding proof"* (Be For Innovation 2021), requiring brands to justify their decisions, from price to packaging. This expectation is further demonstrated in the generation's preference for *"unfiltered aesthetics"* (BoF and McKinsey & Company 2023). Similarly, showing skin, freckles, texture, flaws, and imperfections, as opposed to traditionally hyper-polished, airbrushed, and flawless advertising, as well as having products that represent all colors and tones, are also valued and a preference among this generation (Biondi 2021; Be For Innovation 2021). In fact, 62% of Gen Z says brands over-edit their photos and 70% state that they like it when content from brands is not perfect (Biondi 2021).

In addition, Gen Z deeply values the concept of community-building and thus attaches great importance to a brand's ability to forge an emotional connection, allowing consumers to be part of its narrative (BoF and McKinsey & Company 2023). In other words, it should be as if skincare brands were their friends, friends with whom they can have open conversations about beauty issues such as skin concerns, materialized through UGC[2], for example (Biondi 2021).

Related to this sense of community, another trend rapidly gaining momentum amongst Gen Z is social commerce[3]. As a skeptical generation (Cheung, Davis, and Heukaeufer 2017), Gen Z seeks recommendations from individuals they trust (L'Oréal 2023). According to the L'Oréal Annual Report (2022), social commerce provides an enhanced shopping experience centered around discovery, personalization, and trust. As a result, brands are opting for micro-influencers as brand ambassadors due to their ability to evoke a greater sense of transparency and trust. At the moment, the global social commerce industry is estimated at $492 billion and is expected to grow three times faster than traditional e-commerce (Murdoch et al. 2022).

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

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

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

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

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

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

Additionally, unlike older cohorts, this generation invests significant time in extensive research regarding product benefits and alternatives (BoF and McKinsey & Company 2023). According to BoF and McKinsey & Company (2023), approximately 50% of Gen Z consumers conduct research on product ingredients and benefits prior to purchase. Social media plays a large role in this educational aspect, namely TikTok (Biondi 2021; Be For Innovation 2021), and has thus pushed brands to play the role of educators by providing further information (Biondi 2021). This increasing understanding among consumers regarding their skin needs (Kyra 2022) has ultimately fueled the democratization of the beauty industry (Be For Innovation 2021).

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

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

2.3 Clarins

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

2.3.1 myClarins Product Range

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

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

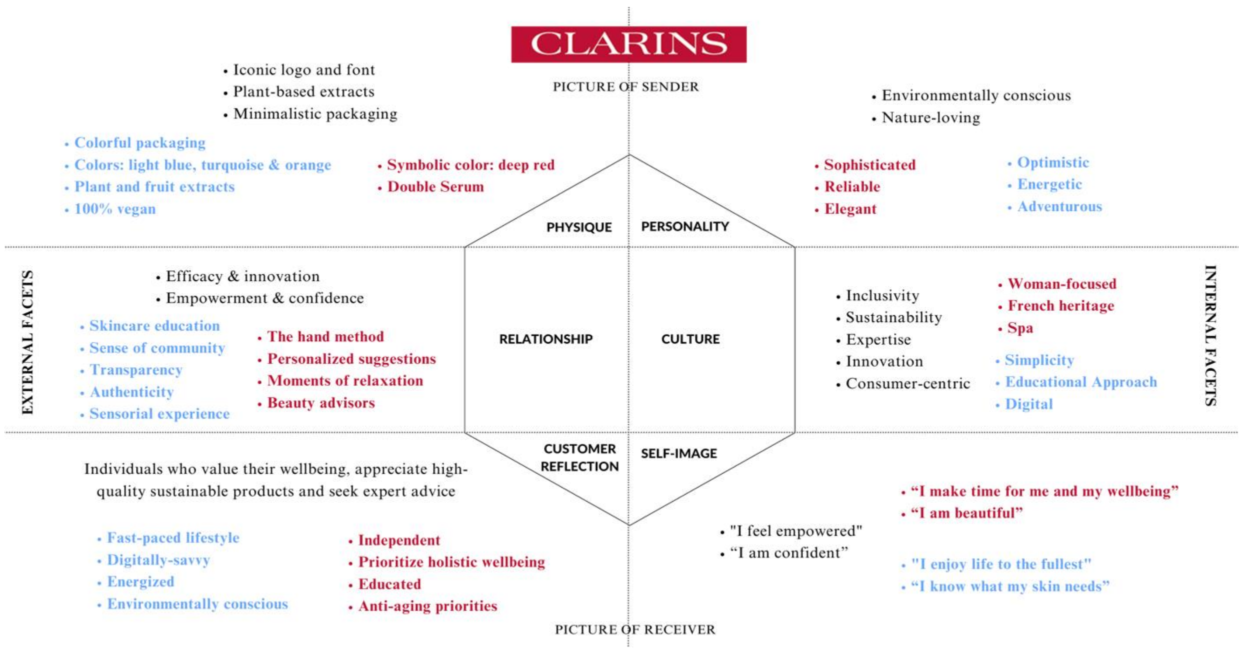

Figure 1 – Clarins' Brand Identity Prism (based on Kapferer 2012)
Source: Work Project Authors

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

Since its inception, myClarins has experienced a few strategic changes, including the shift from a food-oriented promotion to a benefits-oriented promotion in 2022. More recently, in September 2023, the myClarins range underwent a strategic relaunch with a new storytelling concept, offer, approach, and ecosystem (Appendix 2). In addition, the packaging was modified, and certain SKUs[5] were discontinued whilst others, such as the PURE-RESET serum, were introduced (Appendix 3). It is also important to note that the product range experienced a price increase, as it was previously priced between €17.00 and €29.00 (Clarins 2023).

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

2.4 myClarins in Portugal

2.4.1 The Portuguese Skincare Market

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

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

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

2.4.2 Competitors

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

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

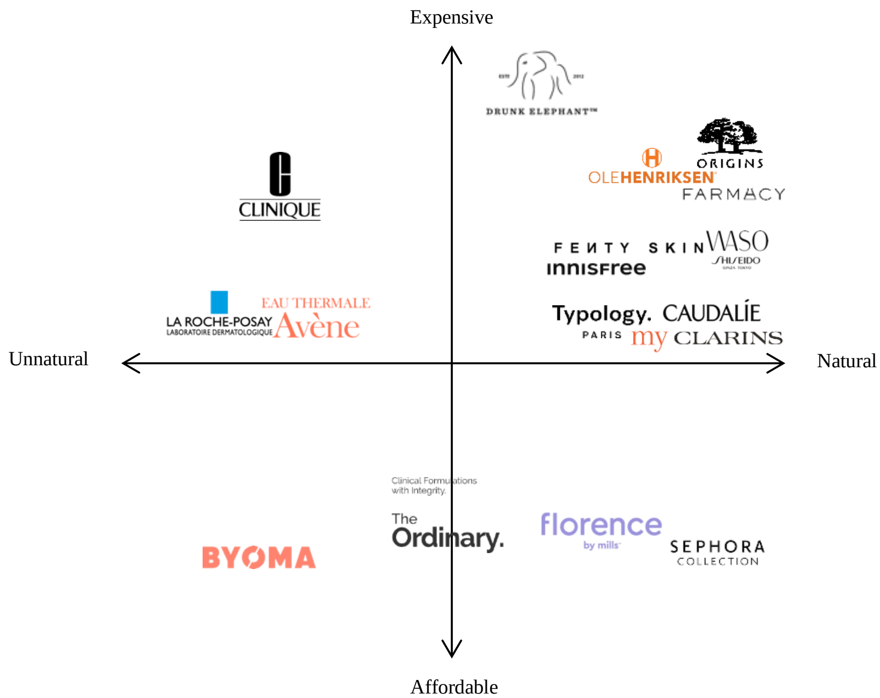

Figure 2 – Positioning Map for Skincare Brands According to Price Range and Composition

Source: Desk Research

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

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

2.4.3 Distribution Channels

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

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

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

With the relaunch, myClarins aims to shift toward a phygital strategy, focusing on accelerating E-DTC[7] and being tactical about their partnerships with retailers, through areas with significant youth presence (Clarins 2023).

[7] E-commerce Direct-to-Consumer.

2.4.4 Communication

2.4.4.1 Social Media Channels

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

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

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

2.4.4.2 Out-Of-Home Channels

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

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

3. Qualitative Research

3.1 Shelf-Analysis

3.1.1 Methodology

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

3.1.2 Insights

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

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

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

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

3.2 In-Depth Interviews

3.2.1 Methodology

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

- **Section 1) Consumer Behavior**: intended to acquire insights into the different Consumer Decision Journey[8] steps;
- **Section 2) Skincare Usage**: explored respondents' skincare journey and evolution;
- **Section 3) Skincare Brands**: had the objective to (1) discover the sample's favorite skincare brands, (2) analyze brand awareness, and (3) understand skincare consumers' perceptions of myClarins, Clarins, and its competitors. This section included a projective technique in which respondents were asked *"If myClarins, Clarins, and (favorite brand mentioned) was a person, what kind of person would they be?"*. This technique had the goal of uncovering respondents' unconscious brand personality perceptions[9].

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

3.2.1.1 Sample Characterization

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

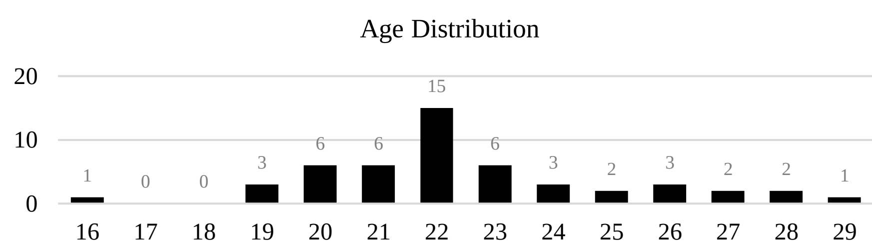

Figure 3 – Qualitative Research: Age Distribution

[8] Based on McKinsey Quarterly (Court et al. 2009).
[9] Brand personality can be defined as *"the set of human characteristics associated with a brand"* (Aaker 1997). As such, brand personality shall be comprehended within the brand image concept, being one type of association consumers have with a brand that gives meaning to it.

Table 1 – Qualitative Research: Sample Characterization

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

3.2.2 Insights

3.2.2.1 Category Insights

a) Consumer Decision Journey

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

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

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

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

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

Table 2 – Newbies' Consumer Decision Journey

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

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

Table 3 – Curious' Consumer Decision Journey

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

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

Table 4 – Skintellectuals' Consumer Decision Journey

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

b) Social Media Communication

Firstly, it was established that social media plays a vital role in influencing the decision-making process of the target, more precisely through TikTok and Instagram. Furthermore, the majority of the interviewees expressed a preference for informative videos explaining the product's application, benefits, results, and ingredients: *"I enjoy seeing reviews, tutorials, also routines on real people using the products, mostly that."* (Female, 23, Curious). Moreover, unpaid reviews, skincare routines, and GRWMs[10] are also content that this generation appreciates: *"I like to see tutorials, routines, tips on how to use products, and real before-and-after photos or videos of people who have used products"* (Female, 20, Curious).

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

c) Educational Content

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

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

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

d) Distribution Channels

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

e) Wellness

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

Beyond this, participants also highlighted the positive influence on their wellbeing routine regardless of having skin concerns or not. For some, it represented a self-care moment: *"Doing my skincare is about wellbeing and taking time for myself."* (Female, 22, Skintellectual). Therefore, it appeared to serve as an opportunity to approach wellness holistically, integrating beauty into their well-being habits: *"(...) it started with body care, food, and physical exercise, and I thought that if I take care of the food and my body, then the face should also be taken care of."* (Female, 23, Curious).

3.2.2.2 myClarins Insights

a) Awareness

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

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

b) Personality Perception

The interviews also shed light on the perception of myClarins' personality relative to Clarins and respondents' favorite brands (Appendix 12). In general terms, the most frequent characteristics used to describe myClarins were *"young", "girl", "skincare", "makeup", "daughter",* *"teenager", "care", "nature", "university", "20s", "woman",* and *"student"*. In contrast, Clarins was mostly described as *"old", "lady", "city", "business", "classy", "social", "older", "elegant", "job-oriented", "works", "French",* and *"mother"*. Thus, a difference in respondents' perception of the two brands can be observed. myClarins seemed to be perceived as a youthful, female-oriented, and nature-inspired brand. A connection with the category of the products the brand sells (i.e., skincare and makeup) was also present. On the other hand, Clarins was perceived as a mature, business and city lifestyle-related, female-oriented, classy, elegant, and social brand. A connection with the French heritage was also visible.

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

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

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

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

4. Challenges & Opportunities

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

4.1 Challenges

4.1.1 Highly Competitive Landscape

Firstly, myClarins is embedded within a highly competitive landscape. The predominant role of private labels, as propelled by the target's low purchasing power, in the growth of the Portuguese mass skincare market could pose a challenge for myClarins' *masstige* positioning. Moreover, the distribution of myClarins products by third-party distributors to discounter perfumeries can result in a misalignment with the range's ideal competitive marketing mix. Simultaneously, the frequent utilization of significant price promotions in the aforementioned discounters may occasionally place myClarins at a disadvantage. This is particularly noteworthy considering that pricing was identified as a significant factor influencing skincare consumers' decisions at various stages of their CDJ. Additionally, the undeniable superiority of pharmacy and parapharmacy brands in terms of top-of-mind, recall, recognition, favoritism, suitability, and usage noted in the in-depth interviews reveals a more difficult path for myClarins to succeed in those areas. Furthermore, some Gen Z preferences such as *prejuvenation* could impact the product range. In this case, consumers and prospects looking for traditional anti-aging products or ingredients would seek alternatives.

Lastly, competitors have been identified with similar value propositions as myClarins. In particular, Typology and Caudalie exhibit a closely aligned price range and natural composition. In this regard, myClarins is missing a USP[11] for competitive advantage.

4.1.2 Limited Awareness

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

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

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

[11] Unique Selling Proposition.

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

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

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

4.2 Opportunities

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

4.2.1 Targeting

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

4.2.2 Positioning

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

4.2.3 Awareness Enhancement

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

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

4.2.4 Loyalty Creation

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

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

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

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

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

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

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

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

5. Limitations

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

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

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

In addition to this, the convenience sampling method employed in the in-depth interviews introduced issues such as a potential lack of reliability and validity. This was manifested in the overall homogeneity of the sample in terms of age, gender, employment status, highest level of education, nationality, and place of residency. Nonetheless, nationality homogeneity was expected given that the research focused on the Portuguese market. Acknowledging this, the requirement for only one year of residency in the country might not have represented an ideal time frame, as it is most likely insufficient for those consumers to be fully immersed in the market dynamics. Additionally, myClarins’ price increase since the interviews poses a sampling issue, as the slight rise beyond the 30€ threshold could have excluded some participants. Furthermore, conducting some of the interviews online might have resulted in a loss of control of the environment by the interviewers, as creating a comfortable and engaging atmosphere is more challenging.

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

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

6. Introduction to Individual Reports

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

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

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

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

6.1 Quantitative Research

To gain additional insights to better approach the five topics mentioned, a survey was developed and conducted on Qualtrics (Appendix 13). The sample was collected through the group's social networks as well as other general discussion web forums. Participants were filtered based on whether they (1) were between the ages of 13-29, (2) had lived in Portugal for the last 3 years, (3) had a skincare routine, and (4) would be willing to spend between €20–€35 on a skincare product (*myClarins* updated price, November 2023). Adjustments were implemented to the filters in response to the qualitative findings. The age range was widened from 16–29 to 13–29 based on insights extracted from the interviews, revealing that respondents initiated their skincare journeys before the age of 16. Moreover, the time living in Portugal was extended to three years instead of initially one year. This decision was based on the rationale that a three-year time interval allows the foreign respondents to have the time to comprehend, develop, and integrate themselves into Portuguese consumption habits and routines.

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

6.1.1 Sample Characterization

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

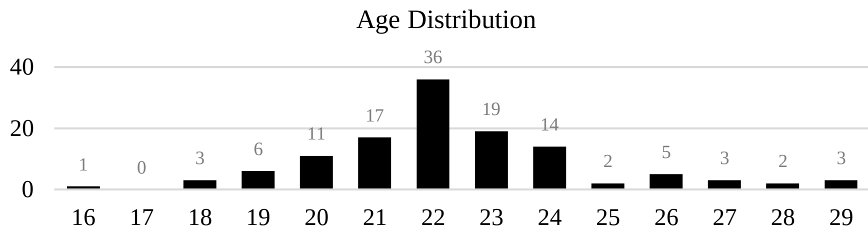

Table 5 – Quantitative Research: Sample Characterization

Figure 4 – Quantitative Research: Age Distribution

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

7. Educational Content – written by Filipa Ramos

7.1 Project´s Purpose and General Overview

The skincare market has seen various developments in recent years, including a notable increase in the number of brands and products on the market. Educational content is a trend that has recently emerged in the skin care industry, especially/particularly among Generation Z (Gen Z). As myClarins aims to enhance its marketing efforts in Portugal, its goal is to effectively engage with Gen Z consumers and capture the attention of this young generation. Focusing on this aspect, this Work Project aims to determine the most effective educational strategies for myClarins' appeal to Gen Z in Portugal. Considering the varying levels of skincare knowledge among Gen Z, who range from 13 to 27 years old (McKinsey & Company 2023), and based on the previous collective research, the segmentation of this group will be into three categories: Newbies, Curious, and Skintellectuals. Moreover, each of these segments identified has different education needs. Newbies are the ones who could benefit more in this aspect since they are the least knowledgeable ones. Curious, value a brand that could explain the skincare routine, i.e. product characteristics and the benefits, and what steps to include. However, Skintellectuals could also appreciate information to some extent, more related to informative content on product ingredients and their combination with other products. Therefore, myClarins must tailor its educational strategies to its desirable target audience and leverage the opportunity to empower its consumers on this knowledge base. To be able to provide a set of recommendations on how the tailored educational content should be, the importance of a skincare routine and the influence of this content on Gen Z's choices will be analyzed, along with the quantitative insights from the survey.

7.2 Contextual Background

7.2.1 The importance of a skincare routine for Gen Z

Skincare holds particular importance for Gen Z - the first digital-native generation (McKinsey & Company 2023), as this demographic's distinct social and digital environments significantly influence their engagement with skincare, because skincare is not just about aesthetics for Gen Z, but rather an extension of their identity and personal values (Euromonitor 2022). Gen Z relies heavily on social media and the internet for skincare advice, reflecting the dynamic influence of digital platforms on their skincare choices and knowledge (Haykal, Nahai, and Cartier 2023), as Gen Z's approach to skincare also mirrors broader cultural and consumer shifts, they are known to be more experimental regarding makeup, skincare, and hair products compared to older cohorts, likely fueled by the rapid spread of beauty trends on social media (BOF and McKinsey & Company 2023). This generation's interest in skincare goes beyond superficial aspects, as they show a sophisticated appreciation for ingredients and product efficacy, transforming the beauty industry with their informed and discerning choice (Biondi 2021). Moreover, the unique characteristics of Gen Z, such as their individualistic approach and sensitivity to price, shape their preferences in the beauty consumer market. They actively engage in user-generated content, making social media a key platform for beauty brand success among this demographic (Euromonitor 2022). As a result of their increasing internet proficiency and shifting cultural standards, Gen Z's understanding of skincare is essentially a multidimensional field that includes self-expression, personal well-being, and educated purchasing.

7.2.2 Gen Z's Impact on Future Beauty Trends

In the realm of skincare, the preferences and behaviors of Generation Z have garnered significant attention, particularly in their discerning approach to skincare ingredients. Research from Kyra Media's Gen Z State of Beauty Report illuminates that skincare routines are paramount for Gen Z consumers, indicating a nuanced understanding and prioritization of skincare over other beauty domains (Burns 2021). This demographic's skincare routines are not only driven by cosmetic aspirations but also by a sophisticated appreciation of ingredients (Biondi 2021). An empirical study focusing on male Gen Z consumers echoes this trend, revealing a keen interest in natural skincare products, underscoring a shift towards more organic and health-conscious choices in skincare (Hoang Lan et al. 2023). This inclination is further exemplified by the rising popularity of preventative aging routines among Gen Z, encompassing products rich in retinoids, vitamin C, and sunscreen, as discussed by The Business of Fashion (Kennedy 2023). Furthermore, nearly half of the Gen Z respondents in a McKinsey survey, reported conducting extensive research on product ingredients and their benefits before making a purchase, highlighting their informed approach to skincare (BOF and McKinsey & Company 2023). This meticulous attention to ingredients showcases Gen Z's commitment to not only achieving desired skin outcomes but also aligning their choices with broader values of health and sustainability.

7.2.3 The influence of educational skincare content in Gen Z

In a business as dynamic and intimate as skincare, educational information about skincare is paramount for educating and engaging consumers, therefore, brands that excel in delivering valuable educational content can significantly enhance customer loyalty, brand awareness and brand perception (Torossian 2023).

Generation Z is by far better equipped with a wealth of information and tends to be more pragmatic and analytical in their decision-making compared to previous generations, and this self-educating generation shows a greater comfort in acquiring knowledge through online platforms rather than by conventional educational institutions (McKinsey 2018). In particular, the influence of educational skincare content on Gen Z is a multifaceted phenomenon, significantly shaped by the digital landscape they inhabit. With the advent of social media, platforms such as Instagram, TikTok, and YouTube have become primary sources of skincare information for this demographic. Studies indicate that social media profoundly affects Gen Z's skincare habits, providing a plethora of information through various content formats, including tutorials, product reviews, and influencer recommendations (Joshi et al. 2022). Influencer marketing, in particular, has become a pivotal element in shaping the skincare preferences of Gen Z because influencers are often seen as more relatable and trustworthy compared to traditional celebrities, and offer personalized advice and product endorsements that resonate with this age group (Castillo et al. 2022). Their role in disseminating educational content is not just about product promotion but also includes imparting knowledge about skincare routines, ingredients, and ethical practices in the beauty industry (Brenton Way 2023). Moreover, Gen Z's approach to skincare is marked by a preference for authenticity and sustainability, as they are more likely to be drawn towards brands that are transparent about their ingredients, production processes, and ethical standards. This generation values educational content that not only helps them make informed choices but also aligns with their broader values concerning environmental and social issues (In-Cosmetics 2020). Therefore, educational skincare content has a profound influence on Gen Z, shaping their attitudes, preferences, and purchasing behaviors in the skincare domain. The role of social media and influencers, combined with Gen Z's values and digital nativity, makes educational content a powerful tool in the beauty and skincare industry.

7.2.3.1 Brands' approach to educational content - online

An example of a brand that adopted a unique education approach for Gen Z via the social media platform TikTok was Neutrogena. Their strategy focuses on spreading skincare information and awareness authentically and engagingly. This approach is a response to the challenge of differentiating Neutrogena's content amidst the various recommendations and potential misinformation circulating among consumers on social media platforms. Since joining TikTok in September 2021, Neutrogena has concentrated on creating content that educates viewers about skincare. The core of this initiative is to provide science-based skincare information through the platform. This strategy not only positions Neutrogena as a reliable source in the skincare industry but also helps build a deeper connection with the Gen Z audience, who value authenticity and educational content. This educational campaign represents Neutrogena's commitment to not simply promoting their products but rather enhancing consumer knowledge about skincare, thereby fostering an informed community of users who understand the science and benefits behind their skincare choices (Monllos 2023).

7.2.3.2 Offline Methods and Traditional Media

In the context of skincare educational content, offline methods and traditional media remain a vital component, complementing digital strategies (Mohamed et al. 2022). While the digital realm offers broad reach and interactive capabilities, traditional media, such as print advertisements, TV commercials, and physical events, play a crucial role in reinforcing brand presence and credibility (Joshi et al. 2022). The impact of traditional media in the skincare industry is evident in its ability to reach diverse demographics, particularly those less engaged with digital platforms (Hassan et al. 2021). By incorporating offline strategies, skincare brands can effectively target audiences through various touchpoints. Print media, such as magazines and brochures, offer tangible resources that consumers can reference for skincare knowledge and product information (Hassan et al. 2021). Events, workshops, seminars and in-store consultations provide hands-on experiences and direct interaction with skincare experts, fostering a deeper understanding of skincare routines and product efficacy (MacDonald 2023; Roca n.d.).

For example, Kiehl's offers a unique approach to educational content through offline channels, particularly highlighted by their in-store skin diagnostic services. They provide personalized skincare consultations to customers, involving a thorough skin analysis to understand individual skin types and concerns. It is further complemented by the Instant Skin Reader, an innovative tool available in Kiehl's stores for instant skin analysis. This service helps customers understand their skin better and receive recommendations for suitable skincare products (“Kiehl’s” n.d.). Therefore, the synergy of offline and online strategies creates a holistic approach to skincare education. Integrating these methods allows brands to cater to a wider audience, ensuring that their educational content reaches consumers across different channels. This integrated approach is crucial for skincare brands aiming to build a comprehensive educational framework that appeals to and informs a broad consumer base.

7.2.4 Trends and Innovations in Skincare Education

The skincare industry has witnessed a significant evolution in recent years, with trends and innovations shaping the landscape of skincare education. In recent years, the focus has increasingly shifted towards the incorporation of active ingredients and multifunctional products, driven by growing consumer awareness and demand for more effective and versatile skincare solutions. This shift reflects a deeper understanding and emphasis on the science behind skincare, highlighting the importance of educating consumers about product ingredients and their benefits (Mintel 2023).

Technological advancements have also played a pivotal role in transforming skincare education. Innovations such as augmented reality and virtual try-on technologies have emerged, enabling consumers to experience products virtually before purchase. This has not only enhanced the shopping experience but also provided an educational platform for consumers to understand how different products work with their specific skin types (Joshi et al. 2022). Additionally, the rise of digital platforms, particularly social media, has revolutionized the way skincare education is disseminated. Influencers and beauty gurus on platforms like Instagram have become central figures in educating consumers, often collaborating with brands to provide insights into skincare routines and product usage (Hassan et al. 2021). This trend signifies a shift towards more personalized and relatable skincare education, resonating strongly with the younger demographics, especially Generation Z. Furthermore, the industry's growing focus on sustainability and corporate social responsibility has led to an increased emphasis on educating consumers about eco-friendly and ethical practices in skincare. This includes the use of sustainable ingredients, eco-friendly packaging, and cruelty-free testing methods, reflecting a holistic approach to skincare education that aligns with the values of contemporary consumers (Kolling et al. 2022).

In summary, the trends and innovations in skincare education in recent years highlight a dynamic and multi-faceted approach. This approach encompasses scientific advancements, technological innovation, digital engagement, and a commitment to sustainability, all of which play a crucial role in shaping the future of skincare education.

7.3 Quantitative Research

Based on the analysis previously conducted on the collective part, the necessity for further research about Educational Skincare Content was evident. Therefore, a study on educational skincare content through a quantitative survey aims to understand how educational materials influence consumer knowledge and behaviors of Gen Z in the skincare market. This research is crucial for brands and marketers to tailor their strategies and content to meet Gen Z's evolving needs and preferences and identify market trends. For that reason, as the individual research intends to understand which type of educational skincare content is relevant to attracting Gen Z in Portugal, the respondents were filtered to understand if skincare knowledge is a crucial factor for them (Appendices 13 and 14). Additionally, there was a discrepancy in the number of responses to each question because respondents may not have completely understood the question, may not have been relevant to them, or respondents gave up in the middle as the survey was too extensive.

7.3.1 Quantitative Research Insights on Educational Content

The analysis of skincare knowledge and behavior among respondents reveals a multifaceted landscape. A significant majority of the respondents (87%) recognize the importance of being knowledgeable in skincare. Additionally, regarding skincare attitudes, the majority, 53% of respondents, are still experimenting to see which products are more suitable for them (Curious segment). While 34% of respondents felt well informed about their skin needs and which products suit them (Skintellectuals segment). The remaining 13% of respondents admit having limited knowledge about their skin needs and the suitability of products (Newbies segment). Therefore, these insights further confirm the previous ones identified during the in-depth interviews, which divided Gen Z into three groups regarding their levels of skincare knowledge.

Regarding the sourcing for skincare information, there's a leaning towards Professional or skincare Experts. Professional dermatologists or skincare experts are the most popular source of information among 67% of the respondents. Other notable sources include social media (58%), Product reviews and testimonials (56%), and Personal recommendations (55%). Beauty blogs (38%), brand websites (37%) and traditional media like beauty magazines (8%) are not as relevant as the previous ones. The frequency of seeking skincare education varies, with most respondents sometimes seeking it whenever they need skincare-related information (39%). Some respondents regularly seek skincare-related information (25%), and others occasionally if the content/topics found are interesting (23%). Only a few actively engage in continuous skincare learning content (10%). Lastly, only 3% rarely seek skincare-related information. Therefore, respondents demonstrate a general but varied interest regarding skincare educational content. Regarding the educational skincare content, respondents showed high interest in skin diagnostics (93.52%), i.e. to learn more about their skin type or specific concerns. Additionally, tailored skincare guidance (86%), ingredient information (78%), and application techniques (76.85%) are also highly relevant for the respondents. There's also interest in current skincare trends (67%) and scientific innovation (57%).

Awareness and participation in skincare brands' educational content is scarce, with only 15% of the respondents aware of any initiative, such as Filorga: "Rubrica do Ingrediente e Rubrica do Especialista Instagram", The ordinary videos and Clarins Beauty Class. Moreover, only 8% have participated in educational activities, such as Clarins Beauty Class or The ordinary social media lives. However, 69% of respondents expressed interest in participating in skincare education programs, indicating a potential market and eagerness to learn more. Finally, the relevance of various educational formats varies. In-person workshops and virtual consultations with skincare experts are initiatives in which respondents are most interested, as 83% of respondents would be interested in participating in both. Moreover, educational initiatives in which more than half of respondents would be interested are tutorials (79%), pop-up stores (69%), online workshops (68%), webinars (63%), community-based events (62%), informative guides (59%), quizzes (53%) and podcasts (52%). Furthermore, only 40% are interested in educational content lives. The diversity of preferences highlights the need for varied and adaptable skincare education methods, indicating a desire for interactive and personalized learning experiences.

7.4. Diagnostic Implications and Recommendations

The following section will comprise the main recommendations to develop myClarins educational skincare strategies for Gen Z in Portugal. Therefore, the following recommendation will include the main purpose and the required content to accomplish the desired outcome.

7.4.1. Ideal Educational Content for Gen Z

The main objective of this recommendation is to improve myClarins' educational skincare content and significantly enhance customer engagement, awareness and loyalty. By tailoring its content to the target audience (Gen Z), the content should reflect the interests and concerns of this group, such as managing acne, early signs of ageing, lifestyle-related skin issues and ingredients. Therefore, creating unique and innovative skincare content to target Gen Z is essential.

Educational videos: The new myClarins YouTube series "Learn. Love. Apply" is an excellent way to educate Gen Z about skincare. However, the information related to the steps in the routine should match the ones available on Clarins' website (Appendix 15). Therefore, this information misleads the target, leading to a lack of trust in the brand and miscommunication. Moreover, to target a diverse audience, younger Gen Z should appear in the videos to exemplify a broader range of skin problems like acne, which is very common during the teenage years. Additionally, dive-in informative videos explaining the effects of skincare routines and ingredients on the skin would help Gen Z understand better the need to treat their skin and visualize why it's so important (Appendix 16) because 93.52% of respondents showed high interest in skin diagnostics, 86% on tailored skincare guidance, 78% in ingredient information and 76.85% on application techniques as the preferred skincare content during the quantitative research.

Social media educational content: Diverse Social media content should also be a focus. In addition to content related to product promotion and tutorials, behind-the-scenes looks at product development and user-generated content will help build community and trust in the brand. Therefore, using Real-life stories about skin journeys and myClarins' product results can be compelling and persuasive content for new users. Moreover, updating the content with relevant articles on skin health, product ingredients, lifestyle tips that affect skin conditions, and interviews with dermatologists or skincare experts will give further reassurance and trustworthiness to the brand. Leveraging on online platforms allows all content to be mobile-friendly, as Gen Z is tech-savvy.

7.4.2. Skin Type Analysis

The main objective of this recommendation is to offer the consumer a personalized and informative experience, further improving myClarins' educational approach to skincare. Employing AI technologies to create a friendly user tool that correctly identifies the individual skin needs only by scanning their faces will help identify various skin concerns and determine the skin type. This technology can educate users about their precise skin needs and concerns, providing a more thorough and detailed skin testing experience. This tool should be made accessible through the brand's website and, alongside the results, should also feature personalized skincare recommendations, such as routines and product recommendations suitable for the user's skin type and concerns and general skin health tips. Additionally, this simulator will prioritize user data privacy and security in all aspects of the simulator to build trust with users. By implementing this tool, myClarins can effectively use a skin type analysis to educate people about skincare, offering a personalized and informative experience.

Therefore, improving the interactive features of the existing skincare routine simulator on Clarins' website to showcase myClarins products will deliver a personalized experience and offer tailored skincare advice specific to Gen Z.

7.4.3. Skincare Wellness Day Program

The main objective of this recommendation is to create awareness among Gen Z for the essential role of skincare and teach them why it's vital to take care of it, afterward, skin is the largest organ in our body (Mohamed and Hargest 2022).

Developing a partnership with skincare experts and dermatologists to create a "Skincare Wellness Day Program" could significantly enhance awareness and education about skincare, especially for young people. Taking advantage of the existing Clarins' Beauty Class content to improve and develop interactive educational Workshops with the guidance of skincare experts and dermatologists will establish further credibility for the brand and a stronger connection and trust with the target. These workshops would focus on skincare basics, such as the importance of a consistent routine, the benefits of specific ingredients, how to properly apply skincare products and the benefits of each step, highlighting the mental health benefits of a skincare routine and emphasizing mindfulness and self-care. Providing a personalized experience and individual skin analysis will help participants understand their skin type and the products that would benefit them most. To further address doubts, Q&A sessions will allow participants to ask skincare-related questions directly to experts. Additionally, this initiative would happen in places commonly frequented by the target, such as school fairs, university welcome week and summer festivals.

7.5. Conclusion

In conclusion, myClarins has various qualities that can appeal to Gen Z. Therefore, to reach its highest potential, myClarins should leverage different educational strategies to attain the interest of Gen Z and improve their knowledge about skincare, which will help increase its Brand Awareness and Loyalty. As a result, every recommendation should be accurate and followed to build trust and a sense of community with Gen Z in Portugal by communicating topics that align with this generation's values.

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9. Appendices

9.1. Appendices – Group Part

9.2. Appendices – Individual Part

Appendix 1) McKinsey's Beauty Price Segments

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

Source: BoF and McKinsey & Company, 2023

Appendix 2) myClarins 2023 Relaunch: New Strategy

New Concept	*"Healthy skin expertise"* 1. Educate & share 2. Healthy skin balance 3. Tailor-made solutions for targeted concerns
New Offer	*"To better answer Gen Z needs"* 1. My Skin Cleansers 2. My Skin Essentials 3. My Skin Solutions
New Approach	*"To help navigate within the brand"* 1. My Skin Cleansers – "to cleanse, prepare and detoxify" 2. My Skin Essentials – "to hydrate, energize and balance" 3. My Skin Solutions – "to recharge, treat and correct"
New Ecosystem	Community Centric Approach 1. Unite Gen Z around myClarins' values 2. Create a phygital destination 3. Be present in targeted platforms 4. Encourage conversation and UGC

Source: myClarins Presentation, August 2023

Appendix 3) myClarins 2023 Relaunch: SKUs

Source: myClarins Presentation, September 2023

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

Retail Channel	Retail Value (EUR million)	Retail Value (%)
Beauty Specialists (Perfumeries)	147.7	36.3%
Pharmacies	85.5	21.0%
Supermarkets	61.8	15.2%
Direct Selling	32.9	8.1%
Health & Personal Care Stores (Parapharmacies and Drugstores)	24.5	6.0%
Hypermarkets	20.7	5.1%
Department Stores	11.4	2.8%
Discounters	4.8	1.2%
Small Local Grocers	2.2	0.5%
Convenience Stores	1.4	0.4%

Source: Euromonitor, 2023

Appendix 5) Competitors Analysis Grid

Brand	Price	Similar Products Categories	Vegan	Natural composition	Target age	Skin type	Main/key ingredient(s)	Positioning itself
MyClarins	€20,50-€34,50	Cream, mist mask, cleanser, treatment	vegan	=/> 88% natural	16/18 to 29	Oily, dry, normal, combo	Fruits and plants	natural skincare For Healthy-Looking Skin
Caudalie	€10.90-€43.50	x	x	x	All ages	x (+ sensitive skin)	Grapes (fruits)	natural and sustainable skincare
Shiseido Waso	€25.50-€48.50 (similar price if in promotion)	x	x	x	Millennials	x (+ sensitive skin)	Frutis and plants	clean and natural beauty
Typology	€12.50-€37.90	x	x	x	All ages	x (+ sensitive skin)	Plants	going back to basics
The Ordinary	€5.00-€33.10	x	x	x	All ages	x (all types)	Science based formulas (vitamins, AHA, BHA, peptides)	affordable, science-driven skincare
Origins	€11.99-€79.99	x	Only some	x	All ages	x (+ sensitive skin)	Plants	Holistic skincare using the power of plants and science
Sephora Collection	€2.99-€22.99	x	Only some	x	All ages	x	Science based formulas and fruits	accessible, trend-conscious, and value-driven skincare
Florence by Mills	€5.65-€37.50	x	x	x	Gen Z	x	plants	beauty on your own terms
Avène	€5.06-€34.90	x			All ages	x (+ sensitive skin)	Thermal Spring Water	Rooted in dermatology and hydrotherapy
La Roche-Posay	€7.65-€45.60	x			All ages	x (+ sensitive skin)	Thermal Spring Water	health conscious, committed to their skin, and focused on safety and protection
Clinique	€6,40-€71,50	x			All ages	x (+ sensitive skin)	Plants, vitamins, BHA, AHA and peptides	Innovative and dermatological expertise
Drunk Elephant	€19.99-€92.99	x	Not everything	x	All ages	x (+ sensitive skin)	Biocompatible Skincare	unique and innovative skincare
Innisfree	€7.99-€39.99	x		x	All ages	x (+ sensitive skin)	Plants	natural and eco-friendly skincare and beauty brand
Kiehl's	€13.00-€90.00	x		x	All ages	x (+ sensitive skin)	Plants	rooted in heritage, natural ingredients, and a commitment to customer well-being
Farmacy	€11.95-€69.50	x	(except the honey line)	x	All ages	x (+ sensitive skin)	Fruits and honey	Natural, clean skincare

Ole Henriksen	€18.99-€61.99	x	x	x	All ages	x (+ sensitive skin)	actives, naturally derived botanicals and essential fatty acids	Clinical Scandinavian skincare
Fenty Skin	€9.99-€59.99	x	x	x	All ages	x	Plants and fruits	treat, smooth, and tighten the look of pores
First Aid Beauty	€12.99-€57.99	x			All ages	x (+ sensitive skin)	oats	Daily skin essentials
Byoma	€13.99-€19.99	x	x		Millennials and Gen Z	x	Science based formulas (HA, Vit B3, Sqaulene, Green tea, Bakuchiol)	accessible and affordable barrier care
Pai	€19.99-€69.99	x	x	x	All ages	x (+ sensitive skin)	Rosehip oil	natural, ethical and sustainable

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

Appendix 6) Distribution of Independent Perfumeries in Portugal

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

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

Source: myClarins Presentation, August 2023

Group Part

Appendix 7) Shelf-Analysis – Douglas

Colombo

Cascais Shopping

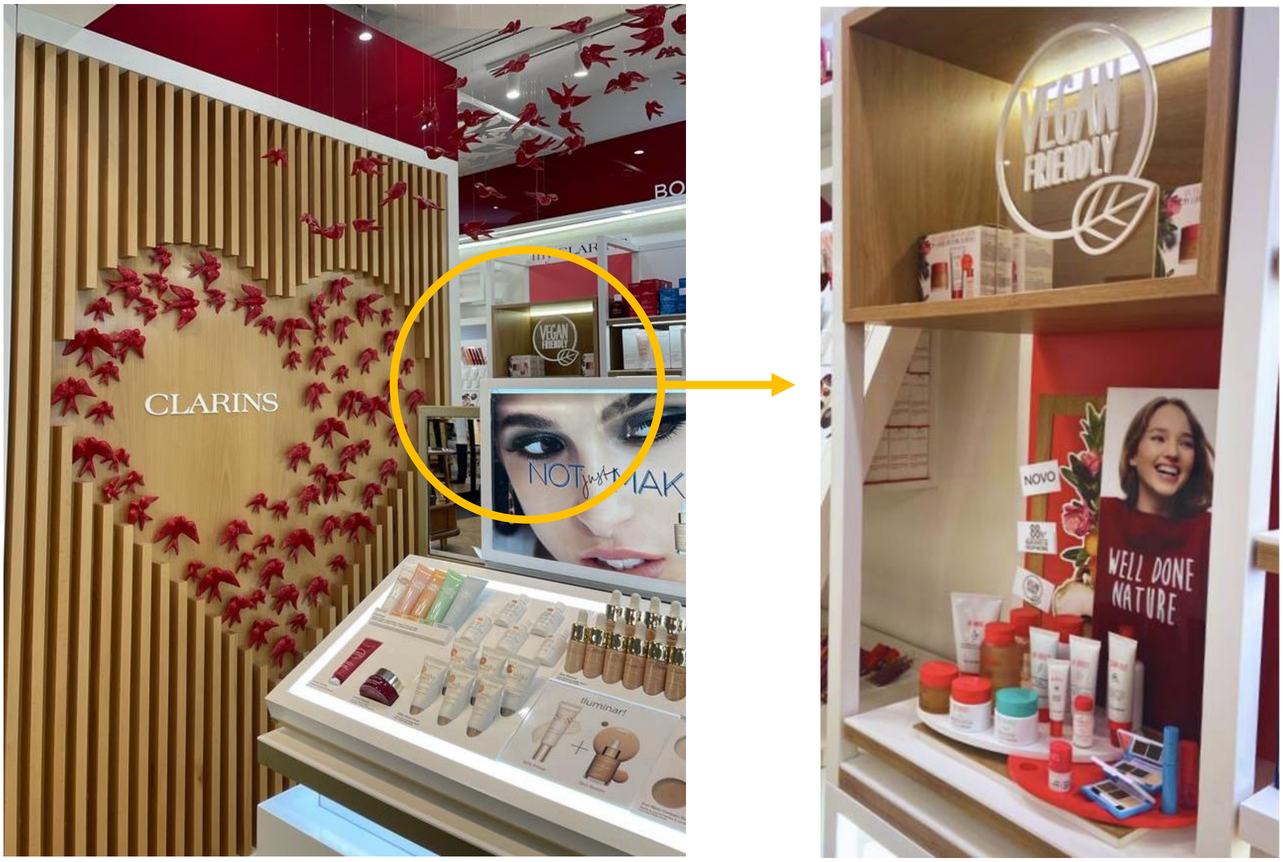
Appendix 8) Shelf-Analysis – Perfumes & Companhia

~~Colombo~~

~~UBBO~~

Cascais Shopping

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



Appendix 10) Pre-Recruitment Questionnaire

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

No: finish questionnaire; Yes: F2

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

No: finish questionnaire; Yes: F3

F3. Is skincare important/relevant to you?

No: finish questionnaire; Yes: F4

F4. Do you have a regular skincare routine?

No: finish questionnaire; Yes: F5

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

No: finish questionnaire; Yes: F6

F6. Please indicate your gender:

Female

Male

Other

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

No: finish questionnaire; Yes: continue to interview

Appendix 11) Qualitative Research: Interview Guide

Warm-up

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

Section 1) Consumer Behaviour

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

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

4. Do you purchase your skincare products yourself? If so, where/how?

5. Do you advocate for a skincare product you enjoyed?

Section 2) Skincare Usage

1. How did you initially become interested in skincare? Could you please tell me about your skincare journey?

2. Take us through your skincare routine. Be as specific as possible. (How many steps; how many products; are the products all from the same brand; how often)

3. Do you adapt your skincare routine to different seasons or climates?

Section 3) Skincare Brands

1. When you think of skincare brands, which names come to mind?

   1st Skincare Brand mentioned – Top of Mind: ___________________________

   Other brands recalled: _________________________

2. What is your favorite skincare brand and why?

3. Is there any brand that you associate with having better products for your skin? Which one and why?

4. In your opinion how can a skincare brand stand out for you? What do you look for in a skincare brand? (education, quality, price, ads/celebrity, image/package ,…)

5. In your opinion what type of content do you like to see the most on a skincare brand’s social media?

6. Out of the following skincare brands, which ones do you recognize?

   - [ ] Drunk Elephant
   - [ ] Sephora Collection
   - [ ] Clarins
   - [ ] Estée Lauder
   - [ ] MyClarins
   - [ ] Origins
   - [ ] Caudalie
   - [ ] Shiseido Waso
   - [ ] Ole Herinksen
   - [ ] La Roche-Posay
   - [ ] Florence by Mills
   - [ ] Typology
   - [ ] Avène
   - [ ] Shiseido
   - [ ] The Ordinary
   - [ ] Clinique
   - [ ] Niod
   - [ ] Bioderma

7. Which of the mentioned skincare brands do you use? (Why?)

8. Which of the mentioned skincare brands would you like to use/try?

Group Part

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

Section 4) Projective Technique

If Clarins, myClarins, and [benchmark mentioned] was a person, what kind of person would it be? How old would they be? What would be their occupation? How would they dress? Where would they live? What would their personality be like?

Wrap-Up

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

Please indicate the following:
Age (in years): _____________

Nationality: _______________

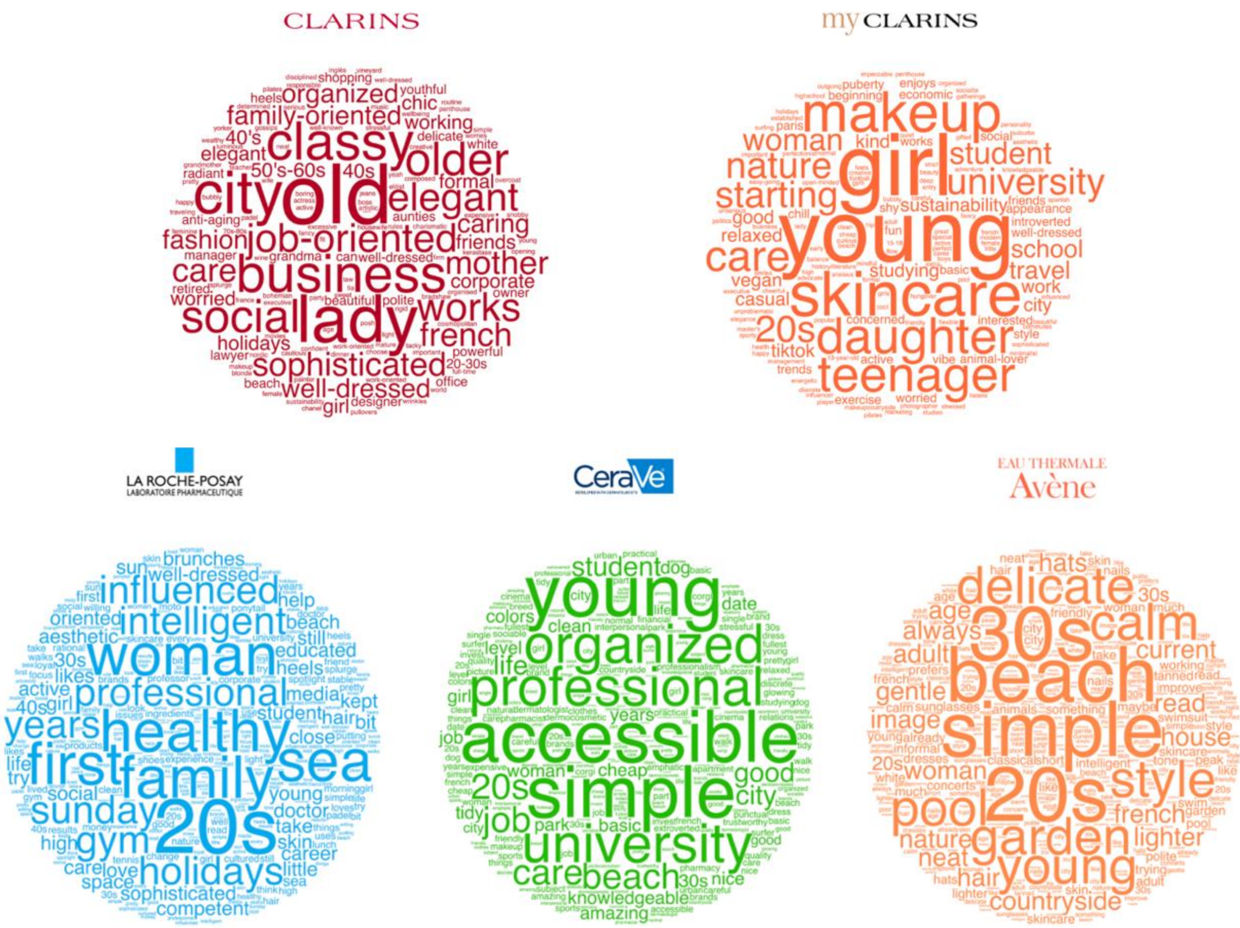
Gender:__________________

Place of Residency (Region): _______________

Education:_______________

Occupation:_______________

Appendix 12) Qualitative Research: Projective Technique Results



Source: Work Project Authors

Appendix 13) Quantitative Research: Survey

"The following survey was developed on behalf of our Master's thesis in Management at Nova School of Business and Economics and its main purpose is to study skincare consumers in Portugal. The study should take you around 8-19 minutes to complete. Please be assured that your responses will be kept completely confidential and will only be used for academic purposes. You may withdraw at any time without penalty. If you have any doubts regarding this survey, please contact

Group Part

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

Section 1) Filter Questions

1. Were you born between 1994-2010?
   - Yes *(continue to F2)*
   - No *(finish survey)*

2. Have you lived in Portugal for the past 3 years?
   - Yes *(continue to F3)*
   - No *(finish survey)*

3. Do you have a skincare routine? Regardless of its simplicity or irregularity.
   - Yes *(continue to F4)*
   - No *(finish survey)*

4. Would you incorporate in your skincare routine a product that is priced between 20-35€?
   - Yes *(continue to Section 2)*
   - No *(finish survey)*

Section 2 – Impact of Skincare on Wellness

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

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

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

6. Please rate your level of agreement regarding the following aspects:
"*Having a proper skincare routine positively influences my...*"

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

Section 3) Self-Concept Questions

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

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

Upper class							
Charming							
Outdoorsy							
Tough							

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

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

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

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

Intelligent							
Successful							
Upper class							
Charming							
Outdoorsy							
Tough							

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

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

Section 4) Online & Offline Channels

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

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

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

- Online channels
- Physical stores

- Indifferent

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

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

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

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

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

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

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

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

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

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

Section 5) Educational Content

18. Please select the colour pink *(control question)*
    - Pink *(continue to Q19)*
    - Black *(finish survey)*
    - Orange *(end survey)*

19. Is being **knowledgeable about skincare** important to you?
    - Yes *(continue to Q20)*
    - No *(continue to Q28, Section 6)*

20. Which of the following statements resonates with you the most?
    - "I am well-informed about my skin's needs and the products/ingredients suitable for it"
    - "I am still experimenting to see which products/ingredients are most suitable for my skin"
    - "I have limited knowledge of my skin's needs and the products/ingredients suitable for it"

21. **Where** do you typically **seek skincare information**? *(multiple select)*
    - Beauty and skincare blogs
    - Social media platforms
    - Skincare expert/professional
    - Product reviews and testimonials
    - Brand's website
    - Beauty magazines and publications
    - Personal recommendations (i.e., friends or family)

22. How **often** do you actively **seek out educational content related to skincare**?
    - Rarely, I don't actively seek out skincare education
    - Occasionally, when I come across interesting topics
    - Sometimes, if I need skincare-related information
    - Frequently, I regularly seek out educational content on skincare

- Always, I actively engage in continuous learning about skincare

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

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

24. Are you aware of any skincare brands' educational initiatives?
    - Yes *(please specify)*
    - No
    - Not sure

25. Have you actively/ever participated in any of the skincare brands' educational initiatives?
    - Yes *(please specify)*
    - No
    - Not sure

26. Would you be interested in participating in educational initiatives offered by skincare brands?
    - Yes *(continue to Q27)*
    - No *(continue to Q28, Section 6)*
    - Not sure

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

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

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

Section 6) Social Media

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

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

Social Media Behavior

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

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

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

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

31. How regularly do you turn to social media to stay informed about skincare?
    - Rarely, I don't actively seek skincare information.
    - Occasionally, when I come across interesting topics.
    - Sometimes, if needed I seek for skincare-related information.
    - Frequently, I regularly seek out content on skincare.
    - Always, I actively seek skincare information.

32. Have social media influencers impacted your selection of skincare products?
    - Yes
    - No *(continue to Q36 Desired Content)*

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

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

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

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

35. Are there any specific Portuguese influencers that you trust for skincare products recommendations? *(allow multiple select)*
    - Helena Coelho
    - Bárbara Corby
    - Bárbara Inês
    - Sara Vicário
    - Sofia Barbosa
    - None, I Don´t follow Portuguese influencers
    - Other *(please specify)*

Desired Content:

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

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

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

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

Section 7) Clarins Questions

38. Are you familiar with myClarins?

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

39. How did you become aware of myClarins?

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

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

myClarins is...

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

Section 8) Demographic Questions

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

42. Please indicate your gender:

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

43. In which Portuguese region do you reside in?

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

Group Part

44. Please indicate your current professional status:

- Student
- Active Employee
- Working Student
- Unemployed

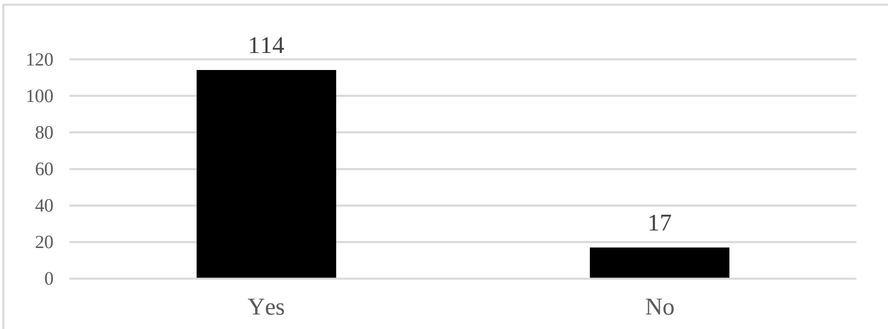
45. Please indicate your highest level of education:

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

9.2. Appendices – Individual Part

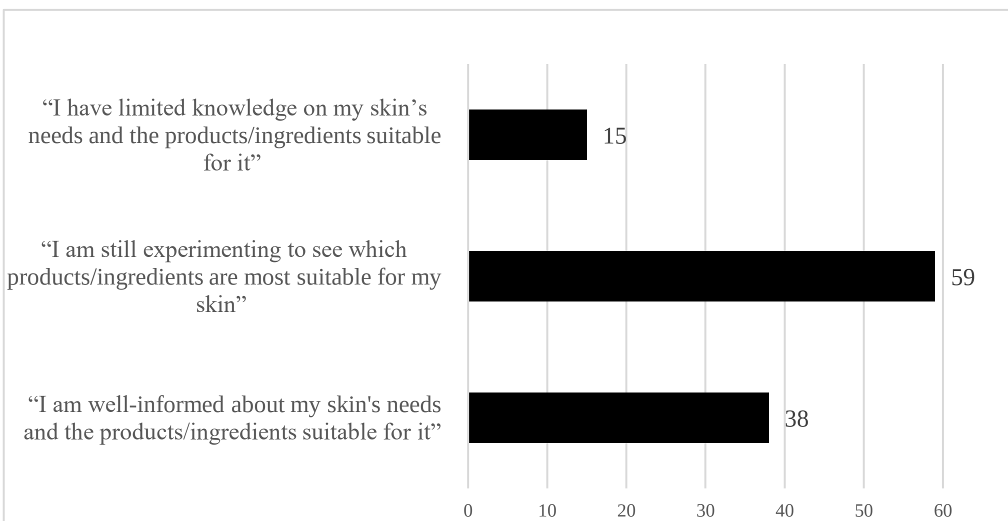
Appendix 14) Quantitative survey - results

Q1. Is being knowledgeable about skincare important to you?



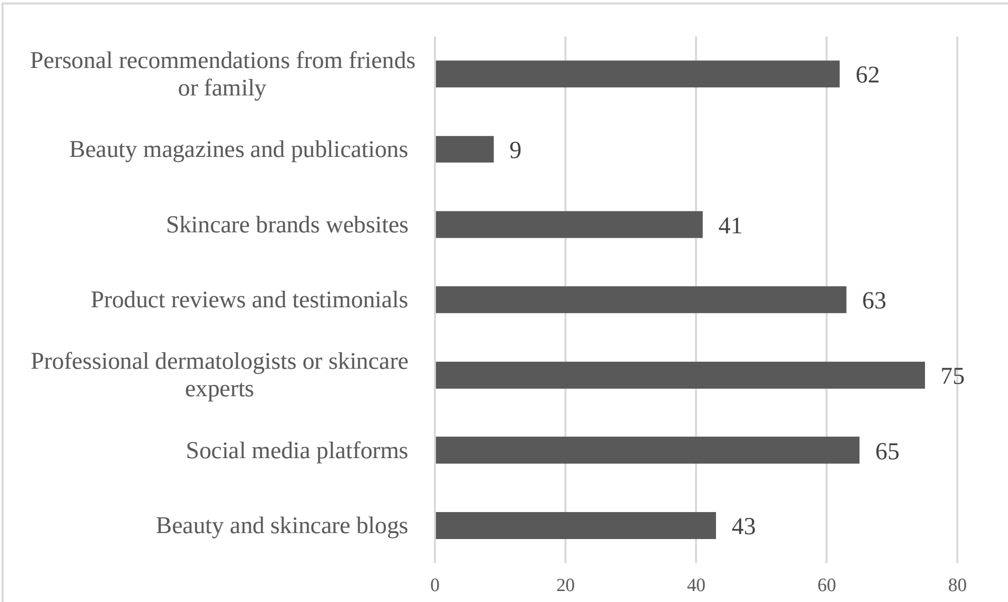
Interviewees' importance regarding skincare knowledge, n=131
Source: Quantitative research

Q2. Which of the following statements resonates with you the most?



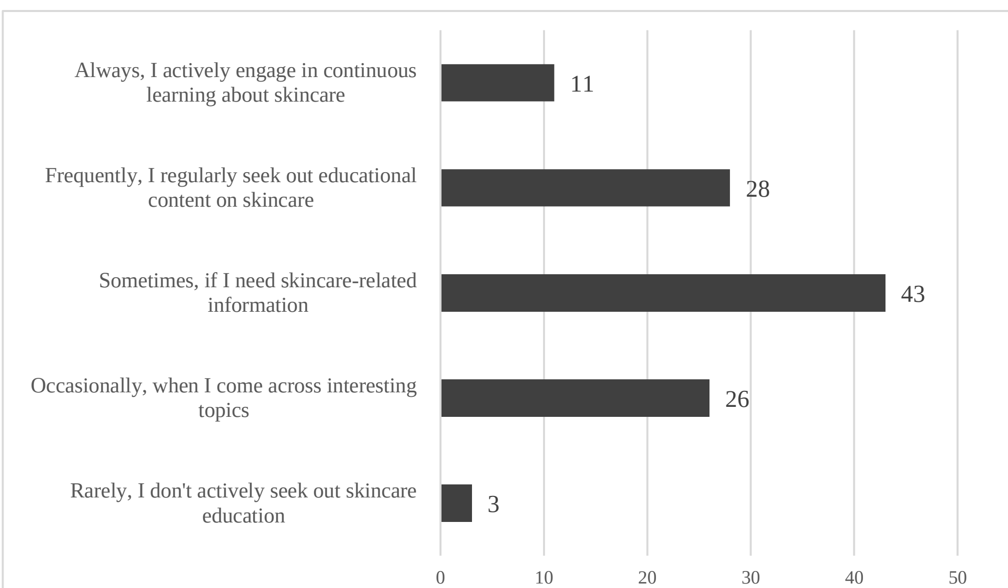
Interviewees' skincare knowledge level, n=112
Source: Quantitative research

Q3. Where do you typically seek skincare information? *(multiple select)*



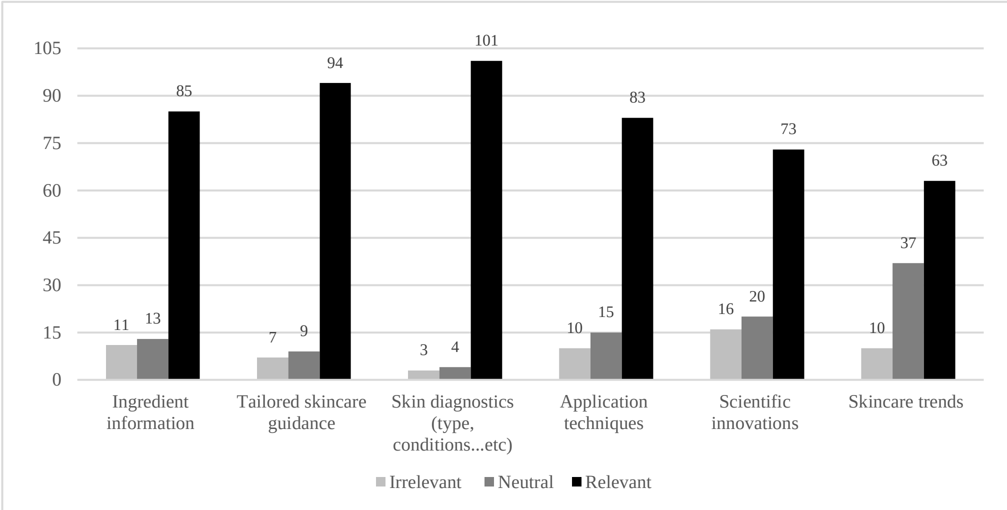
Place where interviewees typically seek skincare information, n=112
Source: Quantitative research

Q4. How often do you actively seek out educational content related to skincare?



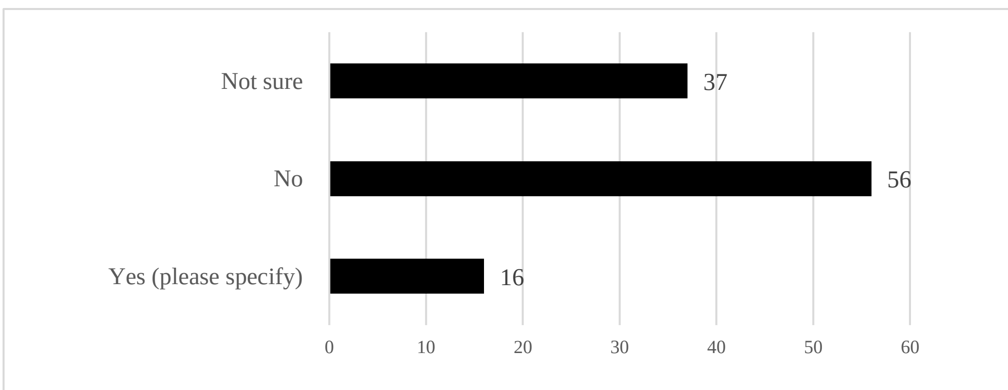
Quantitative insight regarding educational content, n=111
Source: Quantitative research

Q5. Please rate the relevance of



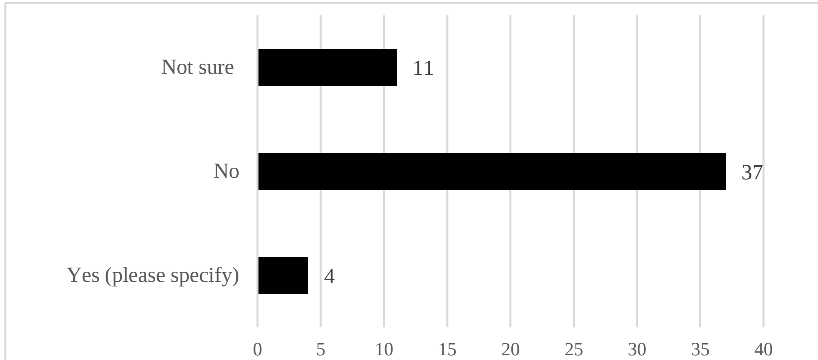
Relevance regarding different skincare content sought by interviewees, n=109
Source: Quantitative research

Q6. Are you aware of any skincare brand's educational initiatives?



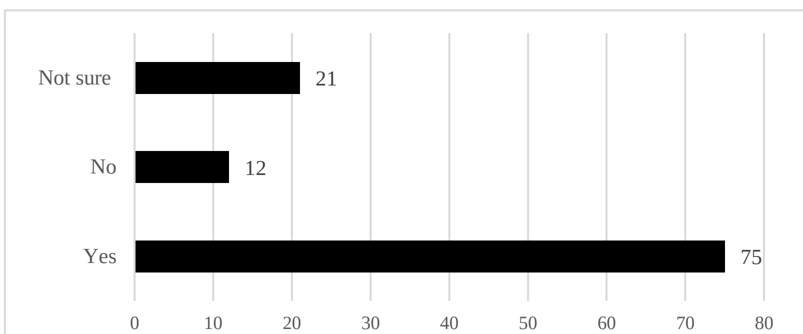
Interviewees' awareness regarding educational initiatives, n=109
Source: Quantitative research

Q7. Have you actively/ever participated in any of skincare brands' educational initiatives?



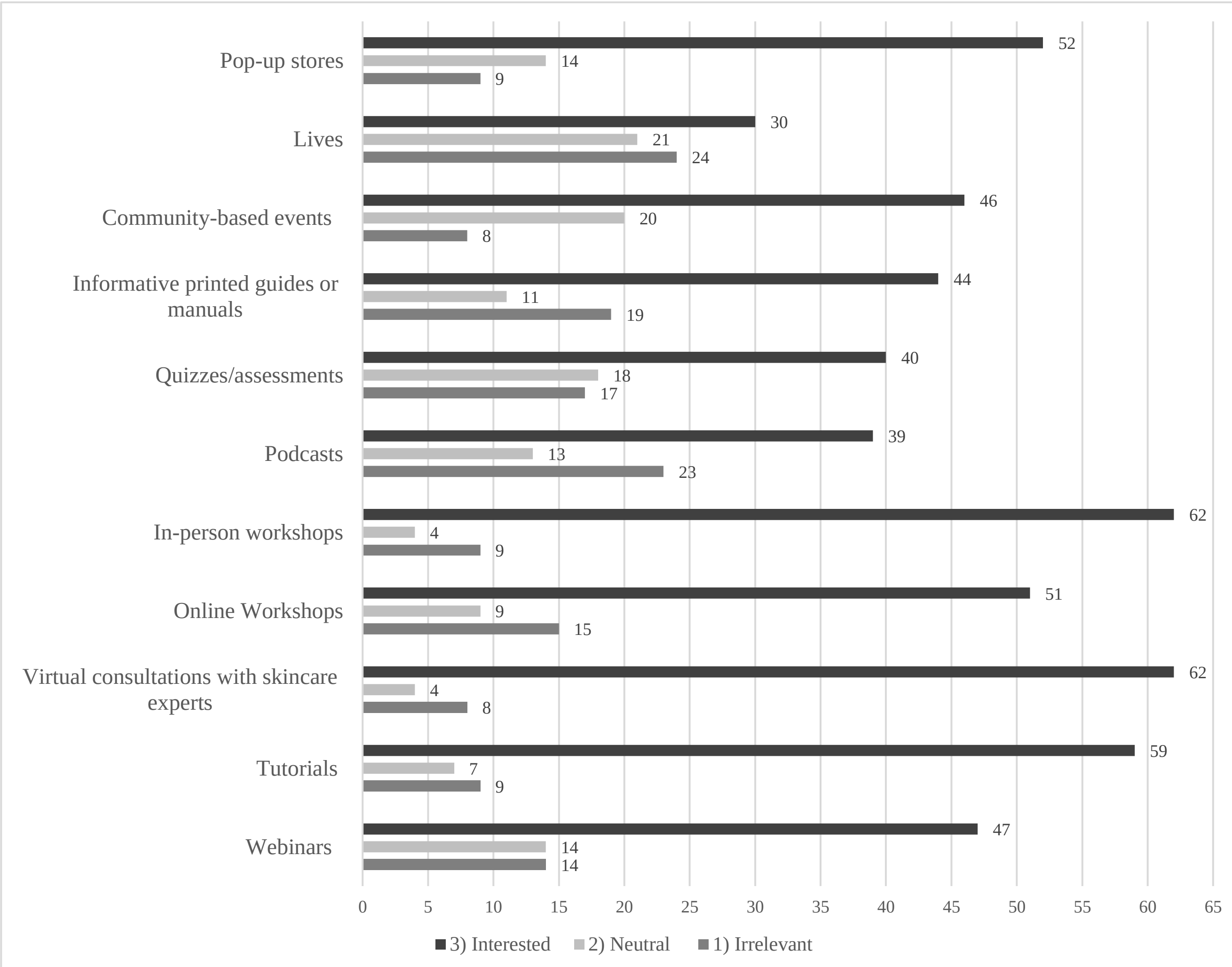
Interviewees' participation in skincare initiatives, n=52
Source: Quantitative research

Q8. Would you be interested in participating in educational initiatives offered by skincare brands?



Interviewees' interest in participating in educational initiatives, n=108
Source: Quantitative research

Q9. To what extent would you be interested in each of these types of educational initiatives?



Interviewees' interest in different types of educational initiatives, n=75
Source: Quantitative research

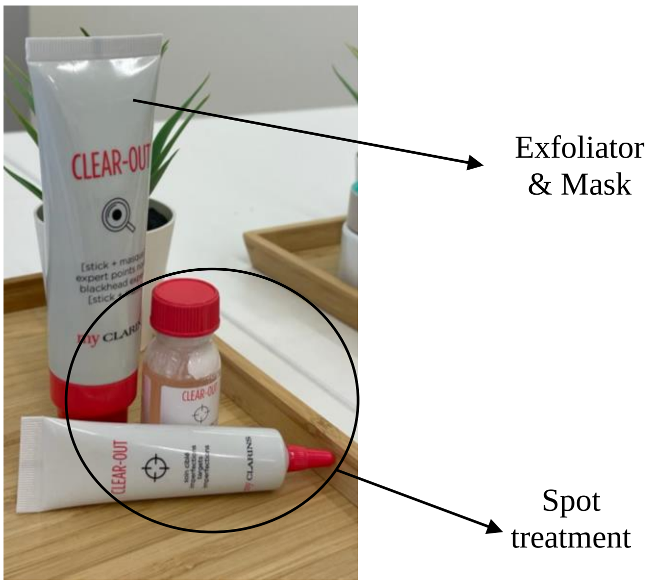
Appendix 15) Skincare routine steps and product order

According to Fátima Pereira (Internal Communication 2023), Clarins' key account manager, a skincare routine involves a series of steps, each serving a distinct purpose to ensure skin health and appearance. Cleansing should be the first step and is crucial for removing impurities, makeup, and excess oil, creating a clean base for subsequent products. Following cleansing, exfoliation removes dead skin cells, promoting smoother skin texture; however, is recommended to do it a few times a week rather than daily. The next step involves applying toner to balance the skin's pH and preparing it for subsequent products. Eye care focuses specifically on the delicate skin around the eyes (as the skin in this area only has two layers, it works as an additional layer for the following steps), addressing issues like dark circles or puffiness. Serums are then applied for targeted concerns, followed by a moisturizer to hydrate the skin and lock in the benefits of the previous steps.

Source: Clarins Beauty Class

Source: Clarins

If needed, as the last step of the skincare routine, spot treatments can be added, specifically for specific areas of concern. In the morning routine, sunscreen is the final and crucial step to protect the skin against UV rays. Adapting these steps according to individual skin types and concerns and following skincare professionals' recommendations can yield the best results.



Source: Clarins Beauty Class

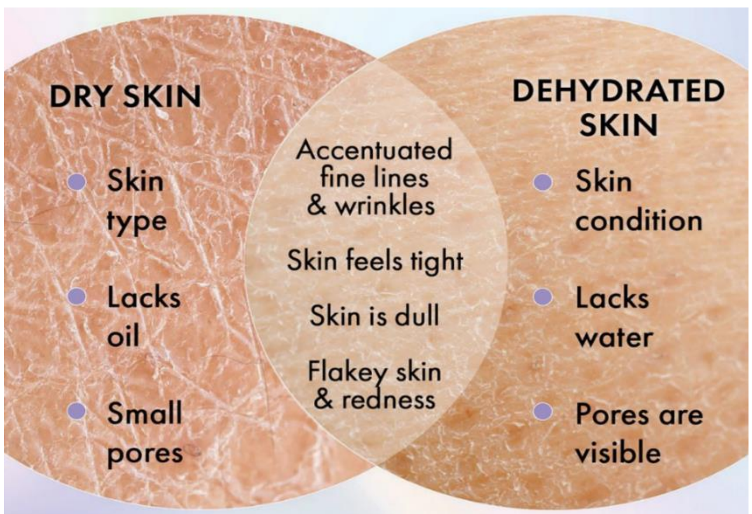
Appendix 16) Skin and Skincare diagrams

Differences in skin types – to showcase the differences between skin types, illustrations similar to Figures 13 and 14 should be shown in educational videos to educate Gen Z about the differences and unique characteristics of each skin type. By doing so, viewers can better understand how different skin concerns manifest, such as blemishes, blackheads, or wrinkles, and how they can be addressed based on their skin type.

Figure 13 – Oily and Dry Skin diagram
Source: HudaBeauty official website

Figure 14 – Dry and Dehydrated skin differences
Source: HudaBeauty official website

Oily and Dry Skin diagram
Source: HudaBeauty official website



Dry and Dehydrated skin differences
Source: HudaBeauty official website

Effect of skincare products on the skin – To effectively educate Gen Z about the benefits of skincare routines and products, using illustrations similar to Figure 15 in educational videos will showcase the effects. These illustrations can demonstrate the effects of skincare products on the skin, providing a visual representation of how different products can improve the skin's appearance and health. By incorporating such visuals, viewers can better understand the importance of skincare and make informed decisions about the products they use.

Figure 15 – Cleanser actions on skin
Source: Introlift Medical SPA website

Individual Part – Filipa Ramos