

How can high-end makeup brands suit the Generation Z' sense of beauty?

**Bachelor Project submitted for the degree of
Bachelor of Science HES in International Business Management**

by

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Declaration

This Bachelor Project is submitted as part of the final examination requirements of the Haute école de gestion de Genève, for the Bachelor of Science HES-SO in International Business Management.

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Executive Summary

The Bachelor Project explores the beauty industry, analyses the major makeup brands on the market and studies the Generation Z as a consumer. High-end makeup brands are facing gaps in reaching the Generation Z, and since it is about to become the biggest global consumer, there is a need to understand and suit this generation's sense of beauty. The objective is to identify the efforts several brands initiated and draw recommendations for high-end makeup brands to appeal to this generation. (1)

The Generation Z is a conscious consumer who favours authentic brands with ethical values. These young consumers are little influenced by the name of a brand or a celebrity's fame. They prefer intimate interactions with a closer entourage throughout their purchase experience. Despite their strong use of the online world, they choose to go in-store to explore, test and buy their makeup. This generation expects high-end makeup brands to flow with the evolution of the technology to deliver the highest quality as well as new experiences. (2)

A major brands analysis outlines the current efforts employed to reach the Generation Z. The brands start working with the Generation Z itself; they choose to include young ambassadors to represent their image to the young audience as well as to empower their employees from this generation and capture their talent and vision. Most of the high-end brands already adjusted their values to embrace the Generation Z' sense of beauty, which is beauty for all. They invest on their digital presence and are on a mission to modernize their companies. (3)

The first recommendation the study draws to better reach and suit the Generation Z is to stay relevant and avoid an inappropriate shift. Then, brands should work on their creativeness when delivering a product as well as an experience, in-store as well as online. One of the core value brands should embrace is freedom and deliver it through their philosophy as well as through the consumer's experience. Finally, the study recommends brands to tell their stories in an appealing and modern way so that the Generation Z can connect on an emotional level and value the brand's authenticity and existence.

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1. Introduction

1.1 Purpose of the Study

The Generation Z is growing fast and is expected to be the largest consumer in the coming years. The Generation Z' consumer behaviour does not appear to be the same as their predecessors and the buying process is less predictable. Therefore, there is a need to understand the drivers, needs and wants of this generation so that companies would have the opportunity to reach this audience and offer products and experiences better suiting this generation' expectations.

The definition of beauty by Generation Z is impacting the beauty industry, where the rules and conventions are broken. This generation consider makeup to be a way of self-expression and self-love, moreover, makeup should be for everyone; for women and men all ages, sizes and colours. According to Generation Z, makeup's role is to highlight your own beauty, it encourages to love and embrace your imperfections because beauty is imperfection.

The global beauty industry is constantly growing; however, the study focuses on the two biggest markets when probing the Generation Z as well as analysing the brands; the Europe and United States. The high-end makeup encompasses traditional brands as well as more modern ones, since there are more and more brands entering the market the past years. The former brands need to adjust their strategies, what are the efforts put in place? The youngest brands had a greater chance to include this generation in their target market, how successful are they to this audience?

The study's purpose is to look at the current movement; how the Generation Z is influencing the market along with how the brands are responding back. The objective is to identify the different gaps for reaching and appealing this population. Then, collect insights and data on the brands' strategical efforts as well as on the Generation Z' behaviour and expectations, what does this generation desire from the high-end makeup brands? The study aims at drawing recommendations for brands to better understand, reach and suit this generation.

1.2 Brief History of Makeup

The history of makeup is thousands of years old and can be traced through different time periods all around the world. Since ancient times, makeup has been used to enhance beauty and it has played important roles in societies. In early times, the use of makeup was also part of cultural rituals such as showing tribal allegiances, its application was often associated with spiritual or religious sense, another desire was to differentiate social classes such as royalty. Today more than ever, makeup is considered as a tool of self-expression and self-love, its application and trends have artistic freedom thanks to its history. Makeup has always been part of our society, for woman as well as for men, where the definition of beauty and the rules around have been evolving through times. The history has shaped the way makeup is consumed in today's products and brands. To have an overview of its path there are key periods to mention.

6000 BC

Egyptian

One of the earliest societies applying makeup was Egypt and they had a very open view on the face paint and makeup was worn by men and woman of all classes. They used natural ingredients and manufactured their own products to make up their eyes, lips and cheeks, some cosmetics such as kohl and henna remained popular until today. (4) As seen in hieroglyphics, the famous style was the lined eyes with kohl, it is a mixture of burnt almonds, ash, lead, ochre and copper. Women as well as men used to paint their eyes with coloured kohl, mostly in dark green, blue or black. Then, to get the red for their cheeks and lips, they used to blend fat with red ochre, and to colour their eyelids, they produced their own eyeshadows from different substances such as malachite. (5)



Figure 1 The portrait of Cleopatra reveals the glamor of ancient Egypt

4000 BC

The Ancient Greeks and Romans

Wearing too much makeup was not well perceived in ancient Greeks and Romans. Their philosophy around it was “less is more”, therefore, women wore modest and natural look. The men believed that woman’s place was at home and wearing an excess of makeup was not tolerated. Women aimed to a clear and unblemished skin so they used to apply a light dusting or poisonous lead to cover up discoloration. Also, they slightly coloured their lips and cheeks with red pastes created from plants or fruits. (4)



Figure 2 A natural and modest look was sought by Roman women

15th Century

Medieval Times

During medieval times, “honest women” were not supposed to change their look and so wearing makeup was deceitful. A strong association between makeup and deception was made by early Christian writers, therefore wearing makeup was proclaimed sinful. Women created homemade recipes to reach a healthy and flawless skin, in a time where a good hygiene was hard to maintain. (4)



Figure 3 Makeup in medieval times was considered dishonest

16th Century

Elizabethan Era

Elizabethan era can be distinguished by an extravagant style that was sought in order to differentiate aristocracy from the middle class. There was a desire for a pale skin look in several time periods, so white face powder was popular. However, Elizabethan beauty look pushed the goal to its extreme since women covered their faces with a toxic substance called “ceruse” to whiten their skin. This product was made from vinegar and poisonous lead, which has led to

health issues such as skin damage or death. Moreover, their cheeks and lips were colored in rouges, to do so they applied a mixture of egg whites and ochres. Women kept their eyebrows very thin in an arched shape, sometimes they even shaved them so that their forehead was larger. (5)



Figure 4 The pink blush of Madame de Pompadour was famous

19th Century

Victorian Era

As time goes on, the history of makeup became less colorful. From the middle ages until the end of the 19th century, pale skin was desired and makeup turned to be vulgar, only prostitutes and lower class women have dared to color their lips, cheeks or eyes. The Victorian era was the period of Queen Victoria's reign 1837 until her death in 1901 in United Kingdom. Beauty was about being reserved and natural, and because of the makeup's association with prostitutes, the Queen has publicly declared that the application of makeup to be vulgar and improper. However, women applied a minimum amount of powder to prevent the shiny skin and maintain a little glow. They also used technics to create a rosy glow naturally by pinching their cheeks and biting their lips. (4)



Figure 5 Queen Victoria preserved a modest makeup style

Suffragettes and prostitutes

Since makeup became associated mainly with actresses and prostitutes during the Victorian Era, the lipstick was considered impolite and taboo. However, in 1912, women were protesting and seeking the right to vote and as a symbol of independence from men, they wore a red lipstick during the suffragette movements. This audacity has been perceived as dramatic but at the same time women showed they could wear makeup for themselves without negative connotation. Since then the lipstick became a symbol of confidence and empowerment and the formation of the lip colour into a stick was produced for the first time by Guerlain the same year. (6)



Figure 6 The red lipstick became a symbol of power

Stage and Hollywood

The rise of the movie industry in Hollywood influenced significantly cosmetics in 1920s and made it more popular. Fanzines, which is short for “fan magazine”, were written by and for people who are passionate about a specific person or topic. (7) So, the Fanzines played an essential role in the makeup's broadening, since they encouraged women to pick up their favorite look from stars and recreate it by helping themselves with their “get the look” guides. Thanks to mass marketing and affordable products, every woman could access to makeup, but when going to purchase makeup was still deemed embarrassing. (4) Moreover, since the Victorian era, almost no man used makeup in the 20th century, it was reserved for the artists and rock 'n' rollers like David Bowie or Prince. (8)



Figure 7 Claudette Colbert was an American actress

Today, women have today the freedom to wear no makeup, to wear it subtly or heavily, which can depend on their mood or inspirations or the events they are going to attend and so they can decide the look they want to create. The history allows them a choice of multitude styles or a combination of different styles, but most of the beauty trends have roots in the very beginnings of human history. (5)

Thanks to the digital world, makeup has seen a new revolution and is booming in the 21st century. Social media and platforms such as Instagram and YouTube represent millions of users taking part in the makeup world. They share reviews on products and show through videos how to apply makeup so others can replicate the look. The division of gender around makeup is also evolving, the line between who 'can and can't' wear makeup is becoming ever more blurred. There are more and more men applying some makeup, sharing their passion for it with videos online and wanting to be part of the makeup industry dominated by women. The loop seems to be looped, as in the Ancient Egypt, makeup is for everyone, women and men again. (4)

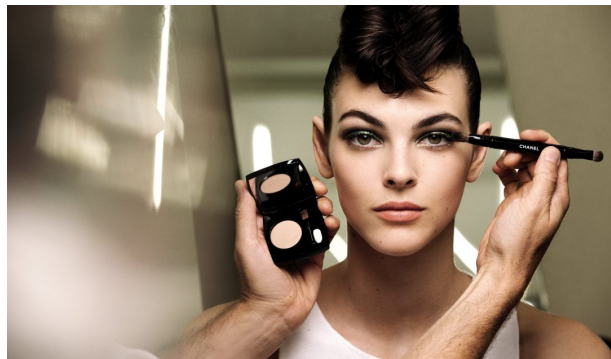


Figure 8 Backstage at Chanel Haute Couture Show

2. Literature Review

2.1 The Generation Z Definition

A generation is defined to be as a group of people born at a similar time and that have lived through a period characterized by events that historically marks and influences that generation. The impactful experiences in their lives and the similarities in their behaviours will allow them to define how they perceive themselves and the world around them. Therefore, generational cohort is an important tool to be analysed by brands and marketers to efficiently interact with a generation.

The generational analysis is not an exact science, generations themselves are inherently diverse and complex groups, which is the reason why there are slight variations on the birth years. Pew Research Center has been studying the Millennial for more than a decade and they decided to determine the cut-off point between the Millennials and Generation Z. They identify the Millennials as being born between 1981 and 1996, and the Generation Z between 1997 to 2012.⁽⁹⁾ As more data may be collected in the future, it may redefine the birth years but the present thesis will remain with the definition suggested by the Pew Research Center, which mean the oldest of that generation are 22 years in 2019.

Generation Z is fundamentally moving towards more traditional values, they are old souls in young bodies. The financial crisis early this century taught them to be pragmatic planners looking for stable careers, they are unlikely to engage risky behaviours. The uniqueness for Generation Z is that all the technology evolution, going from the television, the computer, and the smartphone, have been part of their lives from the start. Indeed, they have never known a world without internet and unlimited digital access; it is the most connected generation. The fact that they have always been into a technological environment impact significantly their behaviours, attitudes, and lifestyles.

According to Barkley reports, Generation Z will account for 40% of all consumers by 2020 and influence up to \$143 billion in direct buying power, with the potential to impact more than \$665 billion in family spending.⁽¹⁰⁾ They will have an important impact on global markets, which represent an opportunity for brands to learn about them, understand them, then reach that generation by adopting their marketing strategies so that they can capture their attention.

2.2 Generation Z Behavior & Expectations

Since this generation is about to have a huge spending power, it is expected to heavily influence companies' marketing strategies and practices. Generation Z behave differently compared to earlier generations and has more power than them to redefine productions and consumptions based on their high expectations and a focus on the shopping experience. Marketers will need to understand their behaviours and meet their expectations if they want to reach this powerful generation of consumers.

During their shopping experience, Generation Z will favour using smart technologies such as self-checkouts, the informative touch points, as well as new cashless payment methods via smartphones without direct use of bank cards or contactless payments. The main advantages of using that smart technology while shopping are the speed and ease of transactions, flexibility and convenience for finding information on products and avoiding queues in stores.(11) Also, when shopping online, they mostly referred to social media apps and customized smartphone applications. Generation Z as a consumer will find itself better equipped and informed than store associates to place orders. They check inventory, read reviews, and compare prices; therefore, they are very demanding and will have little patience.

According to CrowdTwist research, Generation Z shop in stores more than the Millennials despite their attraction to digital and being online. They are likely to make a purchase online after seeing the products in store, especially for apparel and accessories. It works also the other way around, they will browse online before buying in-store. Generation Z wants just-in-time products or services that can be consumed instantly. They expect a tight integration between the online and the physical store, allowing in-store return from online purchase or online purchase with in-store pickup. This means that brands must extend to the physical store and have a cross platforms marketing to engage consumers, who are expecting the technology to work.(2)

The digital world and their view on the world, has facilitated Generation Z's tendency for brand disloyalty, they don't really care about brand logos on their t-shirt. This generation is more driven by price than by brand loyalty, they are more likely to switch for another brand and favour a lower-priced alternative. To conquer Generation Z's loyalty, brands need to rethink their reward programs. Generation Z expects personalized promotions, they don't mind receiving texts or notifications about special offers but they expect more than personalized messages. They want brands to customize communications and be present on social media in a relevant way. They expect brands to deliver high visual experience and provide a personalized shopping experience.(12)

Generation Z is looking for stylish and unique products, and during their purchase decisions they are likely to be influenced by their friends and influencers. The online sphere of influence lead to Generation Z being more likely to purchase through mobile apps and social media. Generation Z value the opinion of influencers on social media, they use YouTube to get information and education through tutorials and look up to Instagram for brands and products. They know the YouTubers are paid, however, they appreciate the personal connection and transparency during the interaction. They don't necessarily value celebrities over influencers since they better identify themselves to influencers. In Forbes's study, it appears that 36% of Generation Z questioned were considering influencers' choice and opinion in their decision making. (13)

The younger generation is not just about the web and digital experiences, they expect transparency and authenticity. Generation Z are socially conscious consumers and expect brands to respect and advocate the causes and values they support. According to CNBC reports, 67% of those surveyed agreed that "being true to their values and beliefs makes a person cool." Their preoccupation for authenticity lead them to favour intimate social media rather than just following traditional celebrities and favour authentic brands rather than just following large brands. In the same report, data shows that 89% "would rather buy from a company supporting social and environmental issues over one that does not." As a brand, there is the need to clearly define what is the brand and then align with the brand's mission in a consistent way so that Generation Z can identify the brand as being authentic.(14)

2.3 The Cosmetic Industry

According to Zion Market Research report, global cosmetic products market was valued at around USD 532 billion in 2017 and is expected to reach approximately USD 863 billion in 2024. Despite the fluctuations in the economy, cosmetic industry is one of the sectors that has remained unaffected from fluctuations.(15)

According to cosmetics Europe, the European cosmetic market was valued at 77.6 billion euros in 2017. Europe remains the premier global cosmetics market, ahead of the U.S., which accounted for 67.2 billion euros. Also, Makeup accounted for 11.17 billion euros out of the European cosmetic market.(16)

The cosmetic industry mainly includes skin care, hair care, perfume and makeup. Since the 20th century, multinational corporations such as L'Oréal or Estée Lauder have lead the market and controlled the production of beauty products. Indeed, there are 182 beauty companies falling under the umbrellas of 7 leaders in manufacturing cosmetic products.

The 7 global companies are Estée Lauder Companies, L'Oréal, Unilever, Procter and Gamble, Shiseido, Johnson and Johnson, and Coty, who control the advertising as well as the way we think about beauty. "Business Insider" created an infographic illustrating the major beauty brands and the parent companies that they fall under. On the picture below not all the sub-brands are listed but those responsible for skin care, hair care, perfume, and makeup.(17)

The infographic displays logos for various consumer goods companies, categorized by brand name. The logos are arranged in a circular pattern, with each brand name at the top and its corresponding logo below it. The brands are: Johnson & Johnson, Shiseido, Estée Lauder Companies, Coty, Procter & Gamble, and Unilever. Each brand's logo is shown in a circular frame, with the brand name written above it. The logos are arranged in a circular pattern, with each brand name at the top and its corresponding logo below it. The brands are: Johnson & Johnson, Shiseido, Estée Lauder Companies, Coty, Procter & Gamble, and Unilever.

Johnson & Johnson

Rogaine
Neutrogena
ROC
Clearasil
Aveeno
Lubriderm

Shiseido

SHISEIDO
JOICO
uno
PURE&MILD
HAKU
D&G
PRIORITY
laura mercier
PLAYLIST
INTEGRATE
BENEFIQUE
AUPRES
RÉVIVE
MACHÉRIE
AQUAIR
NARS

Estée Lauder Companies

GLAMGLOW
smashbox
LE LABO
AVEDA
CLINIQUE
DKNY
LAB SERIES
MAC
LA MER
TORY BURCH
MICHAEL KORS
DARPHIN
Jo Malone
Kilian
AERIN
B.B. Bumble and bumble
ESTÉE LAUDER COMPANIES
aramis
BOBBI BROWN
ESTÉE LAUDER
TOMMY HILFINGER
TOMFORD BEAUTY
ORIGINS

Coty

mondange
Kiss My
JOVAN
bazzano
SASSOON
SYSTEM
BOURJOIS
MEXX
NIOXIN
Londa
PROFESSIONAL
SEBASTIAN
PLAYBOY
GUESS
WELLA
RISQUE
PAIXÃO
WELLA
MAX FACTOR
bruno banani
BEYONCÉ
CLAIROL
DAVID BECKHAM
O-P-I
COVERGIRL
COTY
ghd
adidas
Sally Hansen
BIOCOLOR
RIMMEL
CLAIROL

Procter & Gamble

Rejoice
PANTENE
P&G
SK-II
Olay
Gillette

Unilever

TIGI
Sun
POND'S
mo'isture
Dove
Pears
aviance
VOS
AXE
Lever
2000
NOZOMA
HAZELINE
breeze
Andréon
LAKME
ESKINOL
NEXUS
badebas
simple
Neutril
SUNSILK
ULTREX
Hamam
Glycolid
CLEAR
St Ives
Caress
CLINIC
PLU+
Beck's
Fair & Lovely

The Zion Market Research report has also noticed there are more and more products manufactured and advertised as being organic and sustainable since consumers are more sensitive about the environmental impact through their consumption. This concern leads to an increase in popularity for the brands that highlight those characteristics on their products labels. Furthermore, the products testing on animals worries consumers as it is an ethical issue in that industry. The European Union has banned the animal testing on products, but this is not yet the case in US, where some customers simply choose to not buy products tested on animals. Manufacturers are taking in consideration all these factors when producing and promoting their products.

Many trends in the industry have shaped the way of consuming and applying the beauty products. Technology and innovation is embracing the beauty industry to deliver high tech devices making the routine more enjoyable and providing new beauty solutions never reached before. Also, brands involve consumers in the product development process so that they have an open conversation and gather consumers' feedbacks. This way they better manage to meet their needs and deliver personalized experience by catering to individuals' preferences. The beauty industry thrives on newness with innovative brands born daily, there are constantly new products and an endless stream of trends on social media.

Going back to the targeted audience; Generation Z, and according to Piper Jaffrey's survey; the semi-annual 35th Generation Z survey of more than 6,000 U.S. teens in spring 2018, it appears that this generation is spending more on beauty products than on apparel. His findings show beauty spending is up 20% from just a year ago as teens continue to splurge on makeup and skincare. Generation Z is constantly subject to online presence through the social media, which is the main reason why they are obsessed with their appearance and take care of it.(18)

2.4 High-end makeup

The cosmetic industry is broad and covers many product categories, since the thesis studies high-end makeup, there is a distinction to draw between the mass-market, also said drugstore, and the high-end brands. As a general definition, mass-market brands such as Revlon or Maybelline use more synthetic and less expensive ingredients into their products. Their packaging and in-store experience are minimalists. They mainly are available at drugstores or supermarkets for a lower price compared to the high-end brands. (19)

High-end brands such as Dior or NARS invest in the technology and chemistry of their products. Therefore, they provide premium formulations by including higher quality ingredients and more pigments. Their products may perform better on the different types of skin and last longer. Moreover, high-end brands will focus on the marketing efforts by delivering high-end packaging and personalized experience when distributing the products through their online, physical store or distributors such as department stores or multi-branded store like Sephora. (19)

Makeup consumers can choose to mix both types of makeup, mass-market and high-end, in their makeup bag. Mass-market makeup products are designed so that they are affordable and may be good alternatives for simple needs and everyday look. Whereas high-end makeup aim at suiting individual's needs, which may satisfy specific goals in regard with the performance of the product on the skin. The choice of the makeup brands to purchase will probably depend on the goals, the skin's needs and the budget. (19)

The price being a clear cutoff point between mass-market and high-end, the main question is if it is worth it or not. There was a trend in 2016, where makeup influencers applied and compared the mass-market makeup with the high-end one with the goal to find the best equivalents. Experts recognize there is almost no difference in products such as lipstick or mascara and drugstore products may work just as well as the high-end one. However, the formulation and pigmentation in high-end brands has proven to be better quality and respective of the skin's needs, which may worth the extra money in long-term. (20)

The line between high-end makeup and mass-market makeup can be challenging to define since new brands entering the market are mixing components from both categories and lead to mid-end products. (21) Nevertheless, and against its price, high-end brands bear evident qualities and promises:

- **Brand Name**

The brand name plays its part when choosing high-end makeup from designers or the new cool brands.

- **Fragrance**

High-end products often add fragrances to their formulas so that they enhance the consumer's experience. The ones that do not do it claim that is better for your skin so.

- **Applicators**

The makeup applicators play a core role in the outcome of the look. Therefore, high-end brands include better applicators such as brushes or sponges for the makeup products.

- **Pigmentation**

The performance of the makeup is strongly related of its pigmentation. The application of the makeup won't require much quantity and will last longer on the skin.

- **Packaging**

The high-end packaging versus the low-end one is clearly visible. All parts of the packaging play a role in the consumer's experience as it makes it more enjoyable and special.

- **Experience**

High-end brands are distributed in stores that delivers a personalized experience with access to makeup artists and makeup application before purchasing the products.

2.5 Celebrities, Influencers, Ambassadors

Celebrities

A celebrity is someone famous who receives recognition and attention from the public. The status of fame is often gained in the entertainment business. (22) People may become famous thanks to their talent but also because of the media's attention they attract in their lives. Chris Rojek, a Professor of Sociology and Culture at Brunel University, West London, is an influential author of *Celebrity, Leisure and Popular Culture*. He distinguishes three types of celebrities based on how they achieved their fame; achieved, ascribed and attributed. (23)

1. Achieved celebrities

Achieved celebrities gained fame and public recognition thanks to their talent and skill in their field. It is often the case for actors, singers and sports stars, some examples are Emma Stone, Dua Lipa or Neymar.

2. Ascribed celebrities

Ascribed celebrities gained fame because of their lineage such as royalty, socialites with affluent relatives, and parents' children who are celebrities. Respectively, some examples are Prince Harry and Prince William, then Paris Hilton and, Will Smith's son, Jaden Smith.

3. Attributed celebrities

Attributed celebrities gained fame by amassing the public's and media's attention or by being part of celebrities' clan. The best example is Kim Kardashian and her family, another one is Nicole Richie.

Social Media Influencers

Even though the term “influencer” in history used to define influential spokespersons who established personalized relations between the consumers and the products, today the modern influencers are referred to the social media influencers. An influencer in social media is someone who has built a reputation and gained social media following thanks to his or her knowledge in its field. Social media channels such as Instagram, Facebook or YouTube allow influencers to create and publish content in different ways. Their content may inspire, entertain or inform their followers, which allow to establish a direct conversation with their audience. Influencers can drive engagement and set trends. Influencers have the power to influence their audience’s opinion as well as their purchase decisions, which lead them to collaborate with brands by creating sponsored content and promoting their products. (24) Social media influencers can be categorized by size and scope and the article from Mediakix distinguishes six tiers:

1. Nano-Influencers

1000 – 10’000 followers are a small, niche audience

2. Micro-Influencers

10’000 – 50’000 followers are a wider audience

3. Mid-Tier Influencers

50’000 – 500’000 followers are a large audience

4. Macro-Influencers

500’000 – 1’000’000 lead to a premiere status

5. Mega-Influencers

1’000’000 – 5’000’000 followers put influencers in a category of celebrities

6. Celebrities

Famous personalities who gained prestigious status on social media with more than 5’000’000 followers

Influencers can also be defined by business sectors such as fashion or beauty as well as by a social media channels such as Instagram Influencers or YouTube Influencers. The influencers may not amass the same influence through every platform. Most of the case, they have a primary channel from which they built their career and on which they have the greatest number of followers. (24)

Influencer marketing is a form of social media marketing involving products placements and endorsements from influencers such as traditional celebrities as well as social media influencers. Celebrities can reach a massive audience but they can be less accessible compared to social media influencers who focus on building close and trustful relationships with their followers. The easiest way to distinguish them is the channel through which they built their career; traditional channels or social media platforms. (25)

Social media influencers became very popular and have larger social media followers than the traditional celebrities. Therefore, they are the new celebrities and brands benefit from collaborations allowing them to grow their presence on social media and raise brand awareness. The influencer marketing industry is significantly growing and is expected to reach 5 -10 billion by 2020. (24)

Brand Ambassadors

A brand ambassador is someone who represents and promotes your brand in the market. There are two types of brand ambassadors; the first are famous and renowned people that a brand hire to be the brand's image. They can be traditional celebrities as well as social media influencers with who a brand establishes a marketing strategy. The second type of ambassadors, are people that freely recommend the brand to others. These individuals are likely to be consumers and employees that share their enthusiasm for the brand to their entourage through word-to-mouth or online through positive reviews. (26)

Celebrities vs. Social Media Influencers vs. Brand Ambassadors

The growth of social media has led to the success of social media marketing and the rise of three core players; traditional celebrities, social media influencers and brand ambassadors. The distinction of each may be blurry and the line between traditional celebrities and social media influencers is hard to draw. (27) A celebrity may have a strong influence on social media and be hired as a brand ambassador while a social media influencer can gain a fame status and promote a brand's products. Nevertheless, the following summary should help draw the major distinctions:

1. Celebrities

They are known for their talent and skills in their field such as music, film, art or modelling. They have often endorsed brands but have not necessarily shown a genuine connection with their audience on social media.

2. Social media influencers

They are focused on engaging with their audiences on social media and creating content within their field. They usually are not dedicated to one brand but rather sponsor multitude of brands in their industry.

3. Ambassadors

Ambassadors can fall into two categories; paid or unpaid. They can be celebrities as well as social media influencers, but not only since the consumers and employees can also be considered as such.

2.6 Generation Z redefines the sense of beauty

The definition of beauty has evolved through the generations and new makeup brands are taking the chance to better appeal to the Generation Z's expectations. Indeed, over the last years there has been launches of many beauty brands and concepts seducing the younger generation. The article titled "How is Gen Z shaping the future face of beauty?" look at three key drivers in the beauty industry – beauty is imperfection, beauty is bold and beauty is Instagram.(28)

First, Generation Z is writing modern rules that favour more liberal views on race, gender, identity, sexuality and self-expression, and those rules play into current beauty trends. Today, makeup is for everyone, meaning it has no gender and young men are into makeup too. Moreover, Generation Z's sense of beauty is not anymore about hiding and covering up imperfections but rather love your imperfections and be yourself, because beauty is imperfection. The growing presence of influencers has been part of this change of culture around beauty, influencers encourage others to be themselves. Therefore, brands are looking to shift their message for self-expression and break down gender barriers.



Figure 10 Generation Z is shaping the future face of beauty

Second, Generation Z was born into a world of poverty, war and economic crisis, therefore, they will actively look for brands making changes for a better world. The values and mission of a brand will significantly impact the purchase behaviour of Generation Z, they want brands that add value to their life, that are authentic and meaningful. The universal singer, Rihanna, was one of the first to launch its makeup brand "Fenty Beauty" and her mission was to offer all possible shades for every skin colour. She launched a range of 40 colours of foundations, under the label 'beauty for all'.

Third, Instagram is being part of the beauty buying process from the start to the end. To start, the Generation Z is going to check the beauty trends and beauty gurus on Instagram, purchasing the product while keeping updates on their Instagram story, and finally, posting themselves wearing the beauty products on their profiles. Moreover, a brand that provide "Instagram moments" in-store is very appealing to that generation. The beauty brand Glossier, for example, has created an entirely pink store to encourage the use of social media while shopping in-store.

2.7 Boys wear Makeup

On social media, male beauty influencers are breaking gender roles and mastering the artistry of makeup. They encourage the confidence in young men to accept and celebrate their beauty, men too now want to have the freedom to wear or not makeup. Makeup may represent a way in which men are breaking the gender norms and years ago, they could have not express themselves the same way as today. Since Generation Z has taken the lead to write their own rules, it allows more acceptance and tolerance for beauty open to all; girls and boys. The two testimonies below are illustrating this movement.

Joel Louzado is Indo-Canadian man who lived his youth hiding who he really was by fear to be rejected by its entourage and society. Even though their parents knew about his



Figure 11 Joel Louzado

sexuality as well as his passion for makeup, he was embarrassed to wear some makeup in front of them. He used to wait until everyone home is asleep to let himself apply makeup, take pictures and post them on social media so that he felt less alone. He says: "It is a privilege to be able to do something that's unacceptable in a culture without having to worry about your safety and mental health." (29)

Bretman Rock, 20 years old, is famous for his makeup artistry and his videos on social media. Growing up in a Catholic Latino home, Bretman was taught that makeup is not supposed to be wore by boys. However, he was not fitting the excepted stereotype for boys in society and did his coming out to its close entourage. Today, he feels free to be himself and honoured to live his passion for fashion and makeup he is sharing with his more than 13 millions of followers on Instagram. (30)



Figure 12 Bretman Rock

3. Research Methodology

3.1 Type of Research

The study is an exploratory research; therefore, it implies to explore the research question with the goal of providing a better understanding of the problem. The study identifies the struggle for high-end makeup brands to reach the Generation Z, and the question on how they could appeal to that young audience may not present one finale solution. Nevertheless, the study aims at bringing new data and insight to this field.

3.2 Source of Data

Primary Data

The primary data are collected from interviews with professionals of the beauty industry and a survey addressed to the Generation Z. The data collected are related to Generation Z's behaviour and its expectations from the beauty industry. On the other hand, the data identify the efforts employed by professionals and the remained gaps.

Secondary Data

The secondary data are mainly collected from articles, reports and websites. They relate to the history and the evolving aspects of the beauty industry. The data collected study the brands on the market, especially what are the most appealing brands to the Generation Z.

3.3 Instruments for Data Collection

The collection of primary data has been helped by the following instruments:

- **Questionnaire**

The questionnaire is a series of questions for which it aims to receive responses from the target audience, the Generation Z.

- **Interview**

The interviews invite professional of the beauty industry to bring knowledge and insight on the research question.

- **Instagram**

Instagram is a major tool to contact the Generation Z. The platform helps to reach a broader audience and facilitate the effort put to invite them to respond to the questionnaire.

3.4 Research Methods

The study follows the Survey Method and employs the two following methods:

- **Interviews**

The interview with professionals can allow them to share their experiences, bring more insights and reveal issues or challenges faced to reach the Generation Z. The interviews' format is semi-structured so that there is a set of questions initially prepared but additional questions might be asked during the interview to clarify or expand the topic. (*interviews*)

- **Questionnaire**

The questionnaire aims to describe certain characteristics of the Generation Z as makeup consumers and identify some of their expectations. The questionnaire includes open-ended and closed-ended questions, ranking question as well as multiple choice questions. (32)

3.5 Limitations of the Study

The study carries out the following limitations faced during the research:

- The focus group failed to happen because of the lack of motivation or availability of Generation Z people during the research.
- The respondents of the online survey may not be representative of the Generation Z population in Europe either in United States.
- The respondents are expected to live in majority either in Switzerland or in Miami, Florida because of the researcher's network.
- The professionals of the industry may not share their organization's current strategies.

To overcome the missed focus group, informal discussion with people of the Generation Z helped the study to note several ideas or experiences that this audience would like to be offered by the beauty industry. The ideas were included in a second part of the survey so that their attractiveness could be tested. Moreover, a blank section is left for welcoming new ideas.

4. Major Brands Analysis

4.1 Major Brands Overview

The 20th century had a significant influence on the beauty industry, since most of our makeup manufacturers were established during this era. Most of high-end brands created from that time are still on the market and many more were created in the 21st century. According to the non-exhaustive list below for makeup brands' year of foundation, we may identify in early of the 20th century the foundation of the leader groups such as L'Oréal or Estée Lauder as well as haute couture houses launching their own makeup line, as did Chanel or Christian Dior. Later in the same Century, we observe the launch of new makeup brands from the professionals of the industry such as Urban Decay or Anastasia Beverly Hills. How those more traditional brands can appeal to Generation Z today?

Then, in the 21st century, there are more and more celebrities creating their own cosmetics brands to enjoy one of the most growing sector in the business world; the beauty industry. Rihanna Fenty as well as Kylie Jenner took the opportunity to create their own beauty brands and promote their vision of beauty while successfully running their businesses. An undeniable advantage is their strong influence on millions of followers, especially through social media, which allow them to put less effort in marketing by reaching their target audience instantly. Their fan base is actively engaged and trust them for their taste in style and beauty. Even though Kylie Cosmetics is not in the line for a high-end makeup brand, her success-story may bring some insights on how to reach the Generation Z.

To have a better understanding of new makeup brands' foundation and see what are the efforts few brands put in place to reach the Generation Z, the research zoom at three brands from different time periods; Dior, Urban Decay and Fenty Beauty with a comparison to Kylie Cosmetics.

Table 1 – Non-exhaustive list of major high-end makeup companies

Companies' Year of Foundation	
1909	L'Oréal Group
1924	Chanel
1935	Lancôme
1946	Estée Lauder Group
1947	Christian Dior Cosmetics
1954	Clarins Group
1957	Givenchy Parfums
1976	Benefit
1984	MAC
1994	NARS
1995	Urban Decay
1997	Anastasia Beverly Hills
1998	Too Faced
2000	Giorgio Armani Beauty
2000	Yves Saint Laurent Beauty
2013	Marc Jacobs
2013	Huda Beauty
2017	Fenty Beauty

4.2 Dior

Parfums Christian Dior founded in 1947 is the perfumery and cosmetics line of the French fashion house, Christian Dior. The line belongs to the perfumes and cosmetics portfolio of the world's largest luxury group, the LVMH Group. In 1953, Dior launched his first and iconic lipstick called "Rouge Dior" with which it marks the entrance of the haute couture house in the world of cosmetics. Dior has continued to launch new beauty products since then and in 1969, the first full range of Dior makeup was created. (33)

Dior launched a more affordable beauty line called "Backstage" in May 2018. Since there is a strong link between the haute couture runway shows and the cosmetic line at Dior, makeup artists will be using the whole new line "Backstage" at the Dior Cruise 2019. This line was created to be cooler and trendier with the goal to reach a younger audience. Therefore, the products are offered at a little more affordable price and the campaign included models of the moment such as Bella Hadid or Chu Wong. As the market demand for more diversity increased after Fenty Beauty launched 40 shades of face foundations, the creative and image director for all Dior Makeup, Peter Philips, launched face and body foundations in 40 different shades so that every woman can find her best match. (34)



Figure 13 Bella Hadid in Dior Backstage Campaign

The iconic ambassadors of Dior makeup have been international stars like Natalie Portman or Kate Moss and since Dior desires to keep the younger generation interested, they include younger beauty ambassadors too. In 2016, Bella Hadid, an American model born in 1996, joined the face of Dior. She appeared in an online video series, through which the public can enjoy the backstage experience of her runway shows and know about her favorite products. (35) In 2019, the star Jorja Smith is the new global makeup ambassador for Dior. Jorja Smith was born in 1997 in England to an English mother and a Jamaican father, is a R&B singer with a strong personality. (36) The younger ambassadors have also millions of followers on social media which allow a powerful interaction with generation Z and can help the brand to better reach that audience.

4.3 Urban Decay

Urban Decay is an American cosmetics brand founded in 1996 in California and acquired by L'Oréal in 2012. The reason of its creation is because beauty industry in the mid-1990s was dominated by pink, red and beige tones. Therefore, four partners decided to shake the beauty industry and found their own makeup brand Urban Decay known to be edgy, colourful and different. Urban Decay founders never stopped experimenting new colours to creates endless options; shades of colours are offered in neutrals or dark but also in vivid bright, glimmering or metallic. They name their products inspired by the urban landscape such as Roach, Smog, Rust, Oil Slick, and Acid Rain, which are delivered in a high-end and creative packaging that captures the audience. (37)

Urban Decay appeals to woman who dares to express their personalities and have a taste of dangerous and fun. The brand target women aged between 15 to 40, especially those that want bold colours and looking for cruelty-free makeup products. To engage with its audience Urban Decay organizes “The Shorty Social Good Awards” every year and everyone is welcome to participate by creating the best content on social media and using a given hashtag so that the posts are viewed. This strategy allows consumers to show their talent and gain recognition by the brand. Moreover, the millions of participants increase the brand awareness thanks to the traffic generated on social media. (38)



Figure 14 Urban Decay All Nighter Campaign

Wende Zomnir is one of the founders of Urban Decay who helped to build the brand and to shape the beauty industry. In an interview with Forbes Magazine, Wende explains how she felt about applying makeup at the age of 16. She used to receive comments on how she was hiding behind a mask of makeup but she didn't feel that way, she was telling something about herself rather than hiding. This anecdote truly highlights the philosophy of Wende Zomnir behind Urban Decay since for her makeup should be about self-expression. (39) In regard with the Generation Z' sense of beauty, the success of Urban Decay can be explained by its break-the-rules ethos and the room they offer to makeup lovers of all ages, sizes, colours and genders.

4.4 Fenty

The singer Rihanna launched her cosmetics brand, Fenty Beauty, in 2017, she developed and produced her brand in collaboration with LVMH. Forbes estimated LVMH's stake of 50%, whereas Rihanna about 15%. Rihanna's fortune is however estimated at \$600 million, she continues to grow her empire and announced in May 2019 the launch of Fenty, a new high-end clothing brand with LVMH. Fenty Beauty products sold for an estimated \$570 million in 2018, since her launch in September 2017, Fenty Beauty is sold on its online website and at Sephora, another brand owned by LVMH. (40)

Fenty Face by Rihanna Rihanna's goal was to provide inclusivity women of all skin tones, therefore, her face foundation was launched in 40 shades and expanded to 50 shades by today. Her philosophy, "Beauty for all", include women of all shades, personalities, attitudes, cultures and races. (41) Another important fact is that women of color had been traditionally excluded from prestigious makeup brands or offered only few shades darker than the medium shade "beige". Therefore, women of color embraced Fenty for its inclusivity and encouraged others brands to follow the lead.



Figure 15 Fenty Face by Rihanna

In addition to its large range of shades, Fenty Beauty's advertising was strongly diverse by promoting new models of different ethnicities and body shapes. Fenty Beauty also want to break down the rules in regard of the gender division and engaged men for advertising campaigns. (42) The success of Fenty Beauty pushed competitors to expand their products and offer more shades to promote inclusivity. As discussed, Dior launched the Dior Backstage line with 40 shades of face and body foundation in 2018, this phenomena on the market has been referred as the "Fenty Effect". (43)

4.5 Kylie Cosmetics

Kylie Jenner founded Kylie Cosmetics in 2015, she started with three different “Kylie Lip Kits” and then expanded to more products such as eyeshadows, blushes, highlighters. The three first years, Kylie Cosmetics was sold only online and in few pop-up stores, but in November 2018, she announced an exclusive distribution deal with Ulta and her brand will be placed to more than a thousand stores in the United States. Kylie is working on growing her company and announced the launch of her vegan Kylie Skin line in May 2019, a full set of products for the skincare. In 2018, Kylie Cosmetics generated an estimated \$360 million in revenue, today the company is worth at least \$900 millions and Kylie owns 100% of it, which made Kylie Jenner the youngest self-made billionaire ever. (44)

Kylie Jenner was seen on the reality TV show “Keeping Up with the Kardashians” for more than a decade, which means she has shared her childhood and teenage life with millions of viewers. She has built a personal and loyal connection with her fans over time, she has 144 million followers on Instagram by today and is the 7th most followed person on the



Figure 16 Kylie's summer collection photoshoot

platform. Kylie Jenner being the ultimate influencer, she does not need to turn to a third party to promote her brand, instead she uses her face for Kylie Cosmetics visuals and announces her launches through social media. To drive demand, she launches collaborative makeup collections with her famous family members and seasonal collections such as for Christmas or Summer. Kylie promotes her brand through her personal Instagram profile as well as the business one. This way, Kylie increases her chances to convert her followers to consumers of her products. (45)

4.6 Comparative analysis

In comparison with Kylie Cosmetics, the three other brands mentioned are high-end makeup brands delivering premium experience and quality, thus, targeting consumers with a bigger purchasing power. Kylie Cosmetics' simpler formula of and less expensive package do not include the brand as a high-end one. Kylie Cosmetics consists of a dozen employees, while the manufacturing and packaging is outsourced to a private-label producer, Seed Beauty, which also produces ColourPop, a mass-market brand. Since the renowned name of Kylie Jenner is one of the strongest strength, she can position her brand in mid-end category, where the price can be found between the high and low-end. (44)

Kylie Cosmetics targets a young audience with a lower purchasing power and in comparison, with other celebrities' beauty brands, her consumers spend less in makeup products. According to Slice Intelligence research shared exclusively with WWD in January 2018, Fenty Beauty consumers spend more on makeup products in comparison with other brands of famous personage such as Kylie Jenner, Kim Kardashian or Kat Von D. Fenty Beauty's consumers spend on average \$471 per year on makeup, whereas Kat Von D's consumers spend \$371, KKW's ones spend around \$278 and Kylie Cosmetics' about \$181. (46)

The table below outline the main characteristics and differences each brand going from Dior to Kylie Cosmetics. Since ColourPop is mentioned as a mass-market brand, it is included to the table so that it allows to draw the pricing cutoff point from the three makeup categories; high, mid and low-end brands. In addition to their prices, the table below provide a concise comparison in different areas such as bestsellers, Instagram followers and parent companies of the brands.

Table 2 – Brands comparative analysis

	DIOR	URBAN DECAY	FENTY BEAUTY	KYLIE COSMETICS	COLOUR POP
Lip Gloss Price	Dior Lip Glow 34 \$	Lip Plumper 22 \$	Gloss Bomb 18 \$	Cupcake Gloss 15 \$	Ultra-Glossy Lip 7 \$
Best Sellers	Dior Rouge lipstick, Diorshow Mascara, Forever face foundation	Naked eyeshadows palettes, All-Nighter spray	Pro Filt'R face foundation, Gloss Bomb	Lip Kits, High Glosses	Ultra-Glossy Lip, Lippie Stix
Famous for	Fashion house renown and expert savoir-faire	Boldness and vivid colours	Inclusivity and diversity	Social media renown and fascination for lips	Cruelty-free and budget-friendly
Instagram Followers	5,8 million	11,1 million	8,4 million	21,9 million	8,3 million
Number of Employees	10'400 employees	500 employees	Unknown	12 employees	Unknown
Parent Company	LVMH	L'Oréal	LVMH	Private	Seed Beauty

4.7 Social Media Power

The Kylie Cosmetics success-story can teach and inspire other brands to pay more attention to social media and to Generation Z. Kylie's success can be explained by her passion for makeup, her opportunity to leverage her fame from social media and launch her brand herself. Most importantly, she identified the opportunity to appeal to a younger market, while most of makeup brands were targeting adults. Kylie created her brand to reach and offer her makeup products to teenagers and young people, in other words, to Generation Z; and who could better reach the Generation Z than the one being part of that generation. Kylie Jenner being born in 1997 is an iconic influencer to her generation. (47)

Kylie Jenner as well as Rihanna are signals to consider for the future of retail industry which will be shaped with new rules thanks to social media and the power of influencers. Technology is giving access to a bigger scale and points of distribution, products and distribution can be managed through social media, but the industry is not paying enough attention to it. Social media allows entrepreneurs to escalate the steps and create their business without the need of merchants to sell their products in physical retail stores. Anyone that embraces charisma, authenticity and has technical competences on social media, can start her or his business online. Instagram and Amazon are already developing new technologies to help new influencers and entrepreneurs launch their businesses. (48)

5. Primary Data Analysis

5.1 Interview 1 Overview

The first interviewer is Maryne, she lives in Geneva and is 25 years old and counts 7 years of experience in the beauty industry as makeup artist for several high-end makeup brands such as Dior or Urban Decay. For two years now, she is employed by Estée Lauder as Retail Sales Manager for three brands; the makeup brand, BECCA and the skincare brands, Glamglow and Origins. Since the three brands have a distribution deal with Sephora, she mainly is in charge for the sales agreements as well as monitoring the performance of the three brands through Sephora stores in the French part of Switzerland. The questions and answers are available at the appendix 1.

Ahead of the interview, there is information to mention for an overview of the company. The Estée Lauder Companies is a multinational manufacturer and marketer of prestige makeup, fragrance, skincare and hair care products. Estée Lauder started to produce cosmetics in New York in 1946. Today, the company counts a portfolio of 29 brands, distributed internationally.(49) BECCA was founded in Australia in 2001 and acquired by Estee Lauder in 2016. The brand promotes inclusivity by providing shades for every skin tones and is famous for the glow its products provide. (50)

As reported by PETA (People for the Ethical Treatment of Animals), Estée Lauder still practices animal testing in 2019 on many brands of its portfolio. Estée Lauder says being committed to the elimination of animal testing, however, they do test on animal on the markets where the law requires it.(51). BECCA, on the other hand, is a cruelty-free cosmetics brand and its products are not sold where animal testing is required by law. (52)

An article published in February 2019 explains Estée Lauder's mission to modernize and focus on empowering employees from Millennial and Generation Z to better reach the young consumers. To do so, Estée Lauder created an internal corporate program in 2015, referred as a Reverse-Mentorship Program, where a Millennial or a Generation Z employee is teamed up with a more senior one. (3)

5.2 Interview 2 Overview

The second interviewer is Flaka, she lives in Geneva and, after graduating in 2006, she started her career at Clarins as an intern. She built her career in the company for more than 10 years now, and her current position is General Manager of the Travel Retail EMEA, which is the 5th biggest market for the Clarins Group. The questions and answers are available at the appendix 2.

Ahead of the interview, there is information about the company's profile to keep in mind. Clarins Group is a French family company founded by Jacques Courtin-Clarins in 1954. The three sectors of activities are cosmetics and makeup, perfumes and fashion. Clarins' brand portfolio includes Clarins, My Blend, Mugler and Azzaro.

The beauty division designs and manufactures high-end makeup and skincare, and is well known for its anti-aging expertise. The secret of its success hides behind the plants, Clarins' laboratories develop the products from the best plant extracts and essential oils. Today Clarins, with 28 distribution subsidiaries around the world, is present in more than 141 countries. (53)

As reported by PETA (People for the Ethical Treatment of Animals), Clarins still practices animal testing on its products, which means it is not cruelty-free company. Its policy on it is not easy to find except on its USA website where the company's answers that they do not test on animal except on the market where the law requires such testing. (54)

In January 2019, Clarins has launched a new skincare line called "My Clarins" designed to appeal young women aged from 18 to 29. The line offers nine new products that are vegan-friendly and delivered in a packaging made of recycled materials. Since the line is vegan friendly, it does not allow animal testing and so is not distributed to the market where animal testing is required by law. (55)

5.3 Survey Analysis

Survey Design

The survey has been designed on the SurveyMonkey website, the questionnaire is available at the appendix 3. The survey was divided in three parts; the first part asked mainly about brands preferences and consumers behaviour habits. The second part test selected ideas from informal discussions on what can brands offer to better suit the Generation Z. The last part collected personal data for statistical purpose such as living place and gender.

Target Audience

The Generation Z, as defined by Pew Research Center, begins on the year birth 1997. Since it explains as well that the break-point between two generations is not an exact science and because the debate is still open, the year of birth of my survey starts with 1995. The fear of losing insight from this generation motivated the survey to broaden the year range. After the data were collected, the results were compared from the range year of 1995-2005 to the 1997-2005 and there was no noticeable difference in the answers. Therefore, the analysis retains the range year 1995-2005.

Response Collection

The survey is addressed to the Generation Z audience with a total of 21 questions. The invitation to respond to the survey was mainly sent to people living in Switzerland and in Miami, Florida, which may not be representative of either the European market nor the US market. Moreover, it was promoted with the help of Instagram and several Instagram users accepted to create a swipe up link in their stories to reach a broader audience. The results count a total of 93 respondents and the results are illustrated by the charts provided by the SurveyMonkey website.

1. Population Analysis

Chart 1. What is your birth year?

There is a total of 93 participants, 55 of them are born in 1995 and 1996. The more we look down the latest years, the less there are respondents. The oldest participants were born in 1994 and are 24 years old in the present year. Then, the participants born in 1997 are 22. The youngest participant was born in 2005 and is 14 years old, this person can be identified because of the informal discussion and invitation sent via a direct message on Instagram. The youngest participant is a boy and lives in Colorado, United States. He is passionate about makeup and creates artistic looks, which he posts about on his Instagram page.

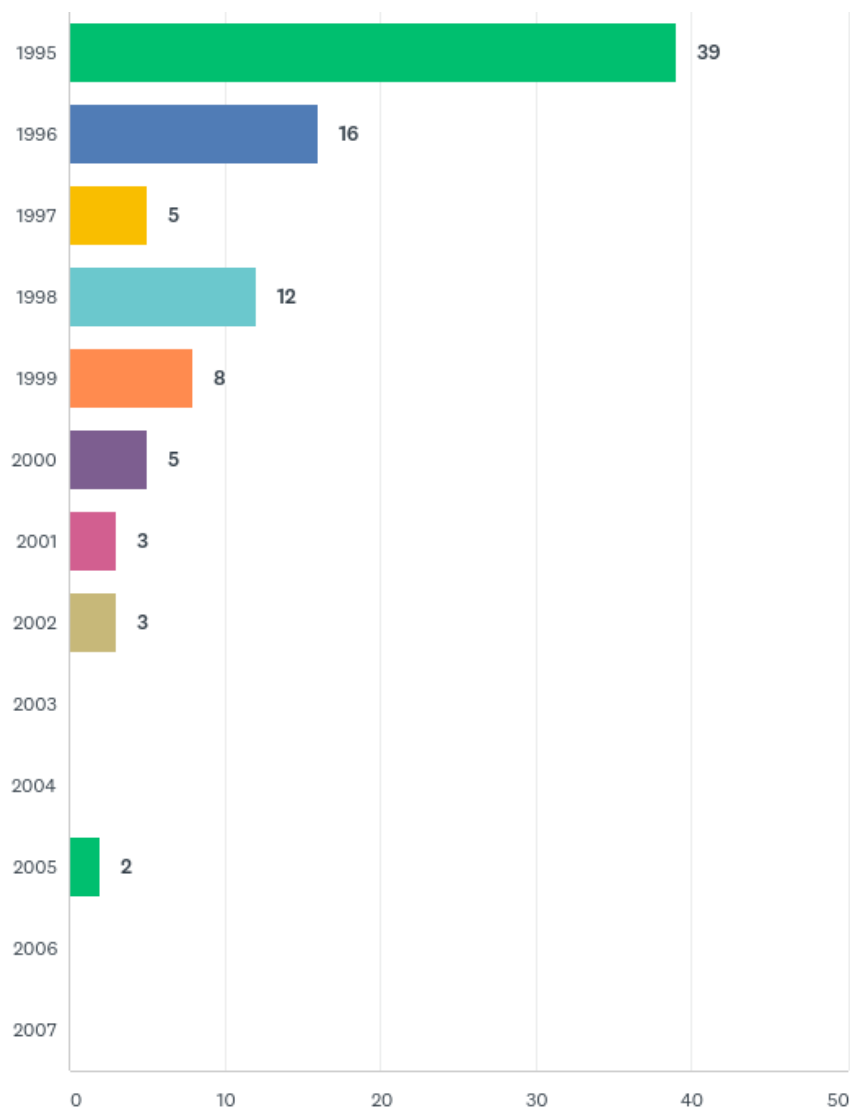


Chart 2. What is your gender?

The significant majority of the participants are women. There has been a feminine domination in the makeup world that can be explains the apparent results.

Nevertheless, there are 3 men participants. Even though the study identifies the gender-neutral movement for makeup, the survey did not collect enough data to represent thoroughly the population of men applying makeup.

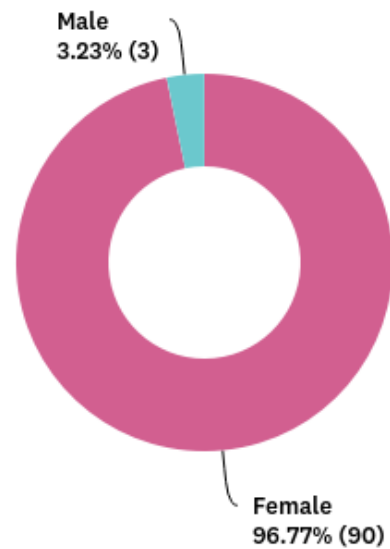
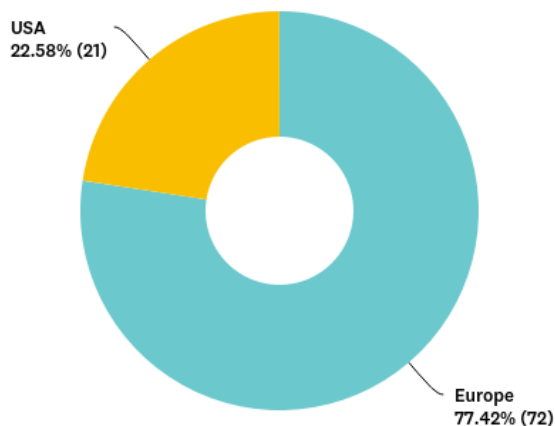


Chart 3. Where do you live?



The results regarding the geographic locations are in majority in Europe with 77,42% and 22,58% in USA. Another question with a blank box allowed participant to notice the country or state they are living and, as expected, most of participants live in Switzerland and in Miami, Florida.

2. Consumer Behaviour Analysis

Chart 4. Where do you most often purchase your makeup?

The 88,17% of the participant purchase their makeup products in a physical store rather than online. This result confirms the preference of the Generation Z to purchase their makeup in-store, even though they expect digital experience and social media presence.

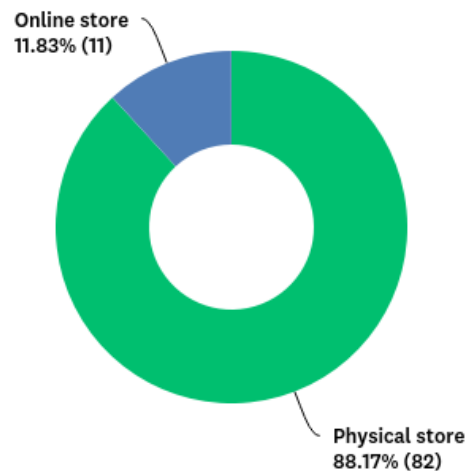


Chart 5. In which state of mind do you most often go in-store?

To understand their behaviour and intentions when going in-store, the question asks whether they go to a makeup store to explore, test as well as purchase products or if they go only test the products without concluding the purchase, or if they go in-store knowing from start which product they want to buy. There is only a minority going in-store with no intention to make a purchase. Otherwise, 86 out of the 93 participants go with the intention to purchase, and 35 of them know exactly what product they want to purchase.

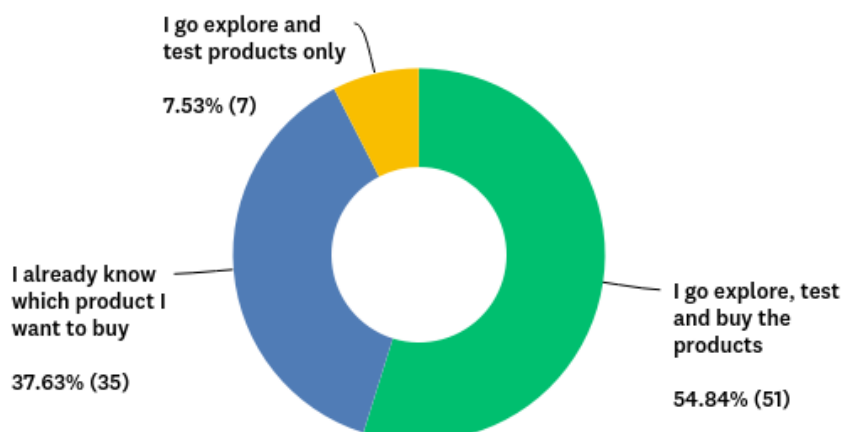


Chart 6. Rank the places for purchasing your makeup in your preference order

According to the chart 4, it is not surprising to the physical store as the first place chosen to purchase makeup products. The online store comes at the second place, ahead the pop-stores and Instagram shopping.

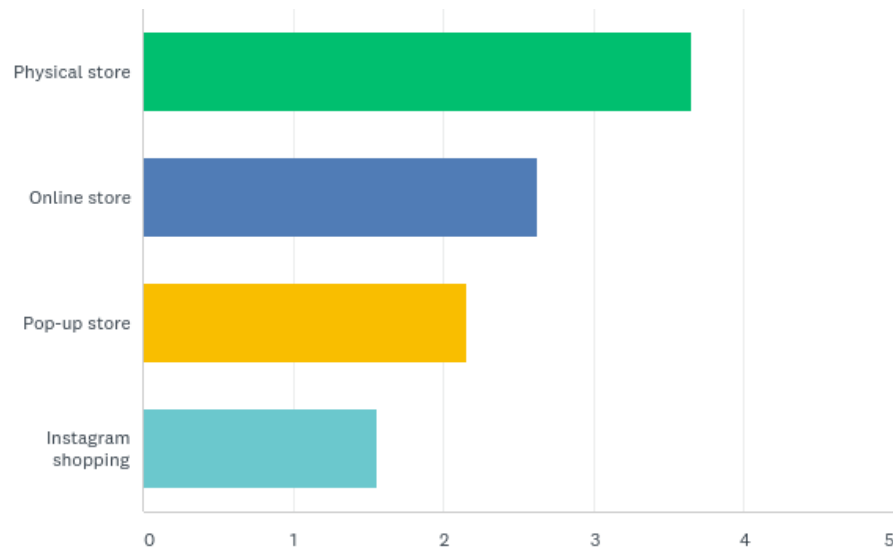


Chart 7. Rank the sources you trust most when purchasing your makeup

The participants trust their family and friends in the first place, then, the makeup artists. This preference may show the desire of this generation to have a personal connection and trust people they can relate to. Another interesting result is that they are more likely to look at the beauty influencers first rather than the celebrities.

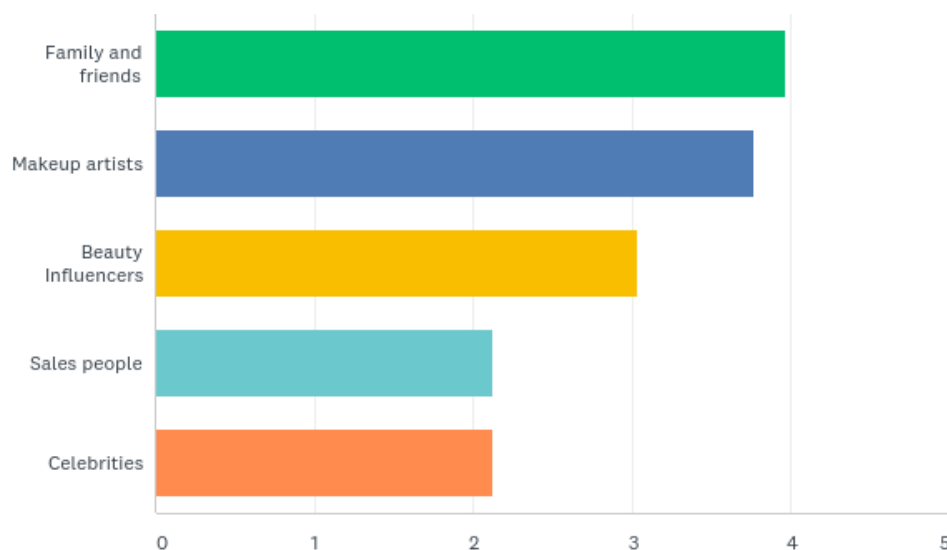


Chart 8. What factors matter the most when purchasing your makeup?

The three most factors selected are quality in the first place, then, price and experience. The three least factors selected are brand image, packaging and beauty trends. The brand image being a core value for prestigious makeup brands, it may not motivate the Generation Z to buy the product for the name of the brand.

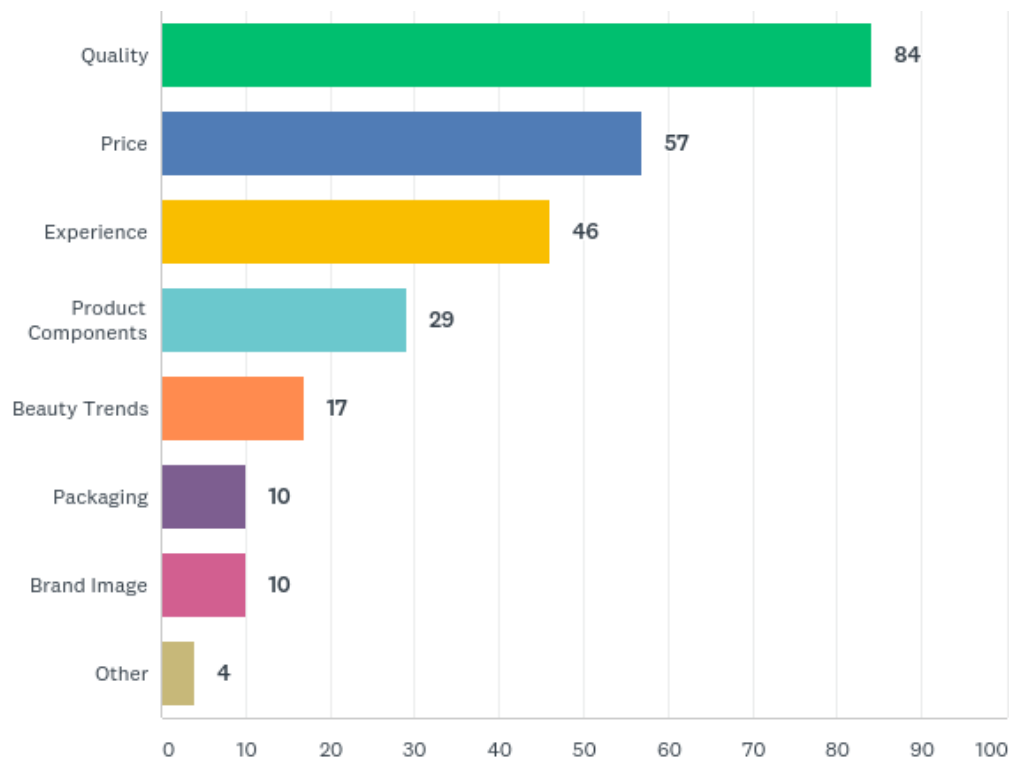


Chart 9. Select the values high-end makeup brands should embrace to attract you

The three most selected values to attract Generation Z are authenticity, diversity and freedom. The Generation Z expect authentic and honest brand they can trust. Moreover, they have a definition of beauty that hold with diversity and freedom values.

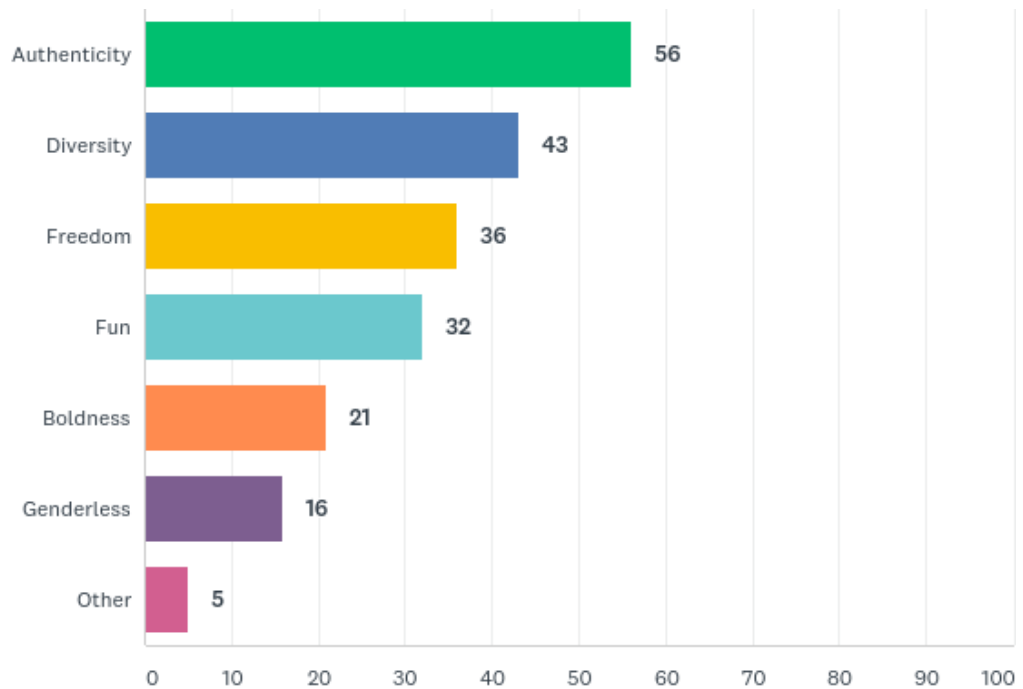


Chart 10. Do you actively check brands' policy on animal testing before purchasing their products?

According to the chart 10, 36,56% of participant will actively look at the brand's policy on animal testing. This number reveals how much sensitive the Generation Z is to the subject and take the time to check the information before considering buying the makeup product. Also, this portion of participants might directly look after cruelty-free brands in their makeup consumption.

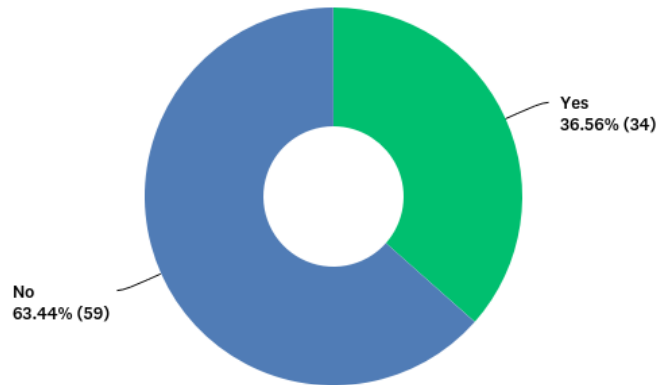
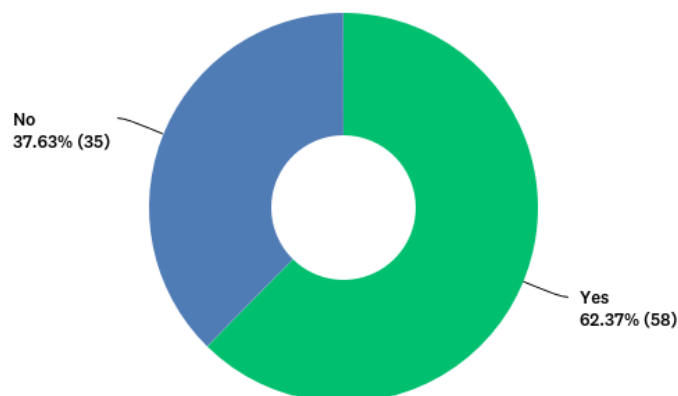


Chart 11. If you discover the brand you are about to purchase does animal testing, do you cancel your purchase to switch with a cruelty-free certified brand?

The following question may apply to participants who do as well as those who do not check the brand's policy on animal testing ahead the purchase decision. The question aims at showing if the person receiving the information in any ways, does cancel the purchase to switch to a cruelty-free certified brand. Here, 62,37% responded they would cancel the purchase and switch the brand, which shows how much the subject matters and influence the purchase decision.



3. Generation Z' Appealing Ideas Analysis

The second part of the survey presented 6 creative ideas that high-end makeup brands could adopt to better suit Generation Z' expectations in the brand's products and services as well as the delivered experiences. The ideas were collected from informal discussion with the Generation Z audience and several ideas are not at all offered on the market. Each idea's relevance and attractiveness is tested near the participants, and the listed charts below are presented from the least attractive to the most attractive.

Chart 12. "Instagrammable moments" in-store

The brands have already offered in-store experiences that are "Instagrammable", the goal is to have a creative décor or new stores' design that motivate the young consumers to take pictures or videos and post them on their Instagram pages. According to the result, this trend may not seem anymore as the major key to attract them, maybe because they expect more.

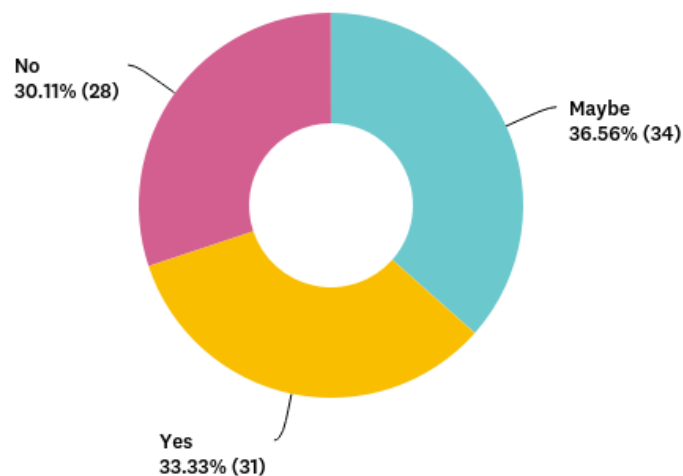


Chart 13. Pop-up store with exclusive experience such as meeting beauty influencers or celebrities

The pop-store is something that has been trendy, especially in United States, and half of the participants seem attracted to it as an exclusive experience.

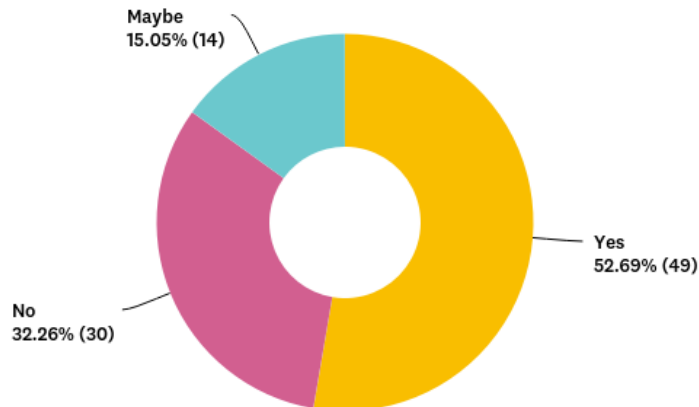


Chart 14. A store organized by makeup products rather than by brands; you would have one stand for mascaras another for lipsticks

The Generation Z appears to not purchase their makeup based on brands name. An idea is to offer a multi-brands store, not organized by brands but by categories of makeup products. It means that when entering the store the consumer can go to different areas of it depending on what he is looking for; a mascara, a lipstick or face foundation. The idea may be challenging to realize because of the competition between brands, however it seems to attract 66,67% of the participants, probably for the freedom of choices and the ease to choose between brands when looking for a product.

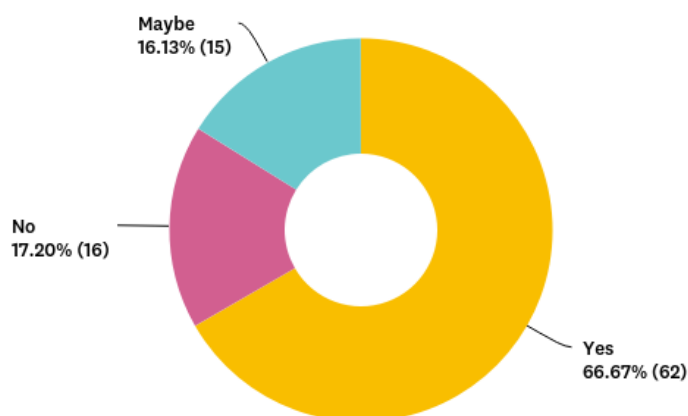


Chart 15. A late night opened store where you get makeup and hair done before going out for an event

The Generation Z is expecting new fun experiences when buying their makeup products. The idea of offering a late night opened store with makeup and hair services attracts 74,19% of participants. The store could become a place to go with friends, share a drink while getting ready for an event.

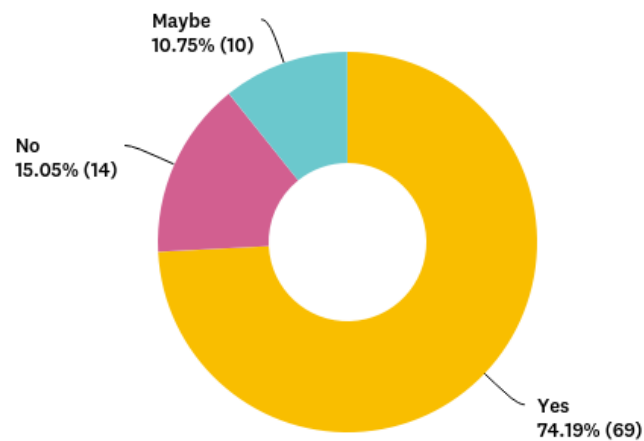


Chart 16. A service for booking makeup artists for important events (wedding, birthday party, baby shower)

The Generation Z appears to trust makeup artist expertise, a service for booking an artist makeup for important events such as a wedding or a birthday attracts 74,19% of the participants. A multi-brands store such as Sephora could implement such a service.

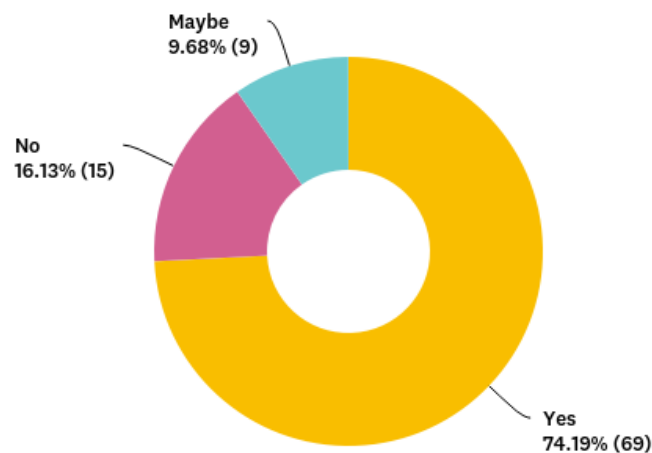
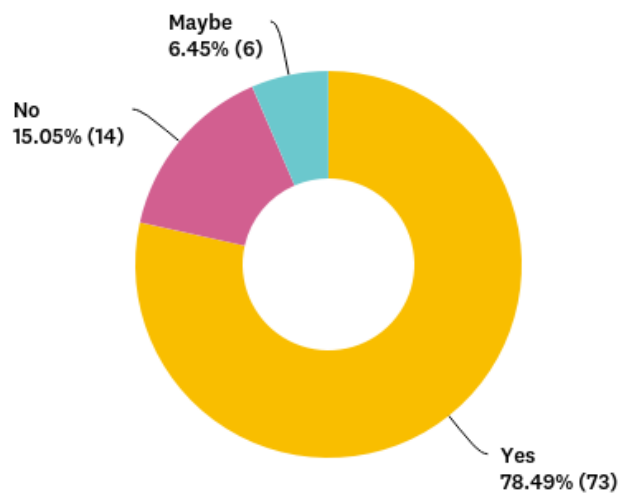


Chart 17. Training sessions with makeup artists teaching you how best to apply your makeup yourself

The most attractive idea is the makeup training session with makeup artists, where 78,49% of participant seems interested in. The training session could take place in-store or organized as independent activity. Since Generation Z already look to beauty tutorials on social media to learn how to apply their makeup, it appears they would appreciate such experience.



6. Discussion

6.1 Literature Review

Beauty Industry

The beauty encompasses 7 major leaders on the market that produce and distribute most of the global consumption. Nevertheless, there are more and more brands founded in the 21st century and there is an opportunity for more to enter the market. Generation Z is the next biggest global consumer and appears to spend on makeup more on it than the previous generations.

The Generation Z' Sense of Beauty

Generation Z is writing new rules that favor more liberal views on race, gender, identity, sexuality and self-expression. This generation encourage to love your imperfections and be yourself, and so, the brands should allow this generation to be who they want to be by providing them the freedom for it.

The Generation Z' Expectations

This generation is expected to become the major global consumer and to strongly influence the business world. Its behaviour and consumption habits are hard to predict. Moreover, its high expectations call the companies to ensure the following:

- **Brands' values** should embrace authenticity because this generation is looking for authentic brands. They want to be able to trust and feel the honesty while making a conscious purchase. They will favour brands with which they can share its philosophy and ethical values as well as having a personal interaction.
- **Integrated in-store and online experience**; the young customers want to be offered with an in-store experience integrated with the digital one. They want to be able to know about the products information or review instantly while purchasing their products, or start the purchase process in-store and end it online with delivery, or vice versa.
- **Fast and facilitated purchase transaction** is a key to satisfy the Generation Z' who has little patience. They won't wait if the process gets longer. They expect availability of products just-in-time as well as a facilitated purchase experience with the help of smart technologies and cash-less transactions.

6.2 Major Brands

The overview of the major companies founded during the 20th and 21st centuries distinguishes the following three periods:

- **Early 20th century**; fashion houses enter the makeup industry and today's leader groups were founded during that time until the mid of the century.
- **Late 20th century**; more and more professionals from the beauty industry launch their own companies to fill the gap on the market with new makeup products.
- **21st century**; more and more celebrities and beauty influencer launch their own brands to offer the young generation more freedom and diversity in makeup.

After observing three brands, one from each period identified, the study can highlight important movements.

- **Dior** being part of the former brands launched Dior Backstage which is a more affordable line and designed to appeal the young generation.
- **Urban Decay** was born in a period where rouge and beige tones were dominating the market industry. Therefore, it launched vivid colours and promoted self-expression.
- **Fenty** has impacted the industry with its major diversity effort when launching the 40 shades of face foundation. The brand has a significant success by the women of colours.
- **Kylie Cosmetics** was created by Kylie Jenner who is part of the Generation Z and is the ultimate influencer on social media, through which her brand was launched and managed by. Today, she is the youngest self-made billionaire ever.

The brands born in the 21st century built their business within today's technology and social media presence. The traditional brands are facing some gaps in that field and should put more efforts on gaining digital skills and filling the gap on their lack of presence on social media. Moreover, technology has given access to a bigger scale and points of distribution, products and distribution can be managed through social media without the need of merchants to sell the products in physical retail stores. The power of social media is changing the way business used to be done and allows entrepreneurs to skip few traditional steps.

6.3 Primary Data

The collection of the primary data captures insights from both the beauty industry and the Generation Z. Thanks to the interviews, the study can identify strategies that companies are putting into place to reach the Generation Z' audience as well as the gaps the professionals are facing today. The survey helped to identify some Generation Z' consumer habits and preferences as well as retain some ideas that brands could explore and offer to this generation.

Interviews

The interviews results allow the study to highlight and extract the following information.

- **Multi-brands store reaches a greater audience**

Since consumers are likely to consume more than one brand, the multi-brands store is one of the favorite place to shop makeup. The consumer has the freedom and the comfort to choose between a multitude makeup brands. The famous multi-brands stores are Sephora, which has over 2500 stores in 32 countries worldwide, then in Unites States, there is Ulta Beauty operating over 1124 stores in 49 states and the District of Columbia.

- **Social media helps to reach Generation Z**

The former brands are struggling to catch up with their social media presence and interactions. This one of the first step to take to reach the Generation Z, and brands know it. Compared with a younger brand who enjoyed implementing digital and social media strategies, a former brand needs to invest into it. Social media will help promoting the brand's image, its campaigns as well as its products launches. Moreover, brands can invite consumers to interact on their products so that it creates consumer-generated content.

- **Influencers & Key Opinion Leaders helps interact with the Generation Z**

One strategy for brands to reach and attract the Generation Z' audience is to work with Beauty Influencers and Key Opinion Leaders. This strategy can help brands to reach a broader audience thanks to the millions of followers these people have on their social media pages. Then, their influence on their community will invite potential consumers to get to know the brand and probably purchase it.

- **Inclusivity trend should stay relevant**

Fenty Beauty took the lead on promoting inclusivity by launching the 40 shades of face foundation. This movement became so trendy that it called other brands to apply the same range of shade to promote diversity. Nevertheless, this is an ambitious goal and probably not applicable by every brand because it may take some time and money to invest in their technologies. Brands should consider embracing diversity while offering what they are best at and preserving a high quality.

- **Reverse-Mentorship program helps to modernize brands**

The Reverse-Mentorship program can help a former company to modernize its structure, refresh the brand image and design more appealing products to the Generation Z. Allowing young talent to express their innovative ideas and be part of the company's leadership will help the brand's modernization process. Moreover, giving voice to young talents inside the company increases the chances to better reach the same audience outside of it.

- **Cruelty-free brands are sought by conscious consumers**

Since the Generation Z is a conscious consumer they favour certified cruelty-free makeup brands. This generation is sensitive to the companies' impact on the environment and the ethical values they bear. Today, the young consumers are more likely to actively check the makeup components as well as the brand's policy on animal testing and take it into consideration in its purchase decision. To do so they use apps on their smartphone to get the information.

- **Animal testing should come to an end**

The European market has already forbidden the animal testing, and most major brands are supportive of the end of animal testing, however, still do it on the markets where the law requires it. Clarins Group is actively working with the Chinese government on finding new alternatives, so that animal testing will end.

Survey

The survey identifies several purchasing preferences from the participants as well as factors of influence in their purchasing decision.

- **Physical store is the preferred place to purchase makeup**

Despite their active presence on online platforms, they are more likely to purchase their makeup products in-store. The major reason for that preference will be because consumers prefer to test the makeup products and see how the colours or the quality match their skin before purchasing them. Moreover, the results show that Generation Z consumers go in-store with the intention of a purchase, sometimes they already know which product they want to purchase.

- **Family & Friends are the preferred reference**

The Generation Z will trust its closest people when purchasing makeup products; a classic scenario is when a best friend tried and recommend a red lipstick for its long lasting, then, you will trust her judgement and consider purchasing the product. The young consumers value recommendations if they are based on the person's personal experience and expertise. Therefore, they first trust their close entourage as well as makeup artists, before the beauty influencers on the social media.

- **Top 3 factors influencing the purchasing decision**

1. Quality
2. Price
3. Experience

The brands' efforts probably should pay attention to these factors by ensuring the highest quality, have an appropriate price strategy as well as providing an experience. The experience is probably the one thing a brand can offer with an infinite creativity.

- **Top 3 values a brand should embrace to attract Generation Z**

1. Authenticity
2. Diversity
3. Freedom

This generation expects transparency and authenticity from brands, they want to trust them and have a sincere relationship. Since makeup should be for everyone, this population wants to be free, free to be themselves and as a consumer, free to choose the brands to purchase.

7. Conclusion

The study first attempted to learn about the Generation Z; the way this generation thinks, acts and behaves is redesigning not only the beauty industry but also the business world. This generation is born in a world where internet and social media have always been part of it. Therefore, it expects the digital presence of a brand to be up-to-date along with the technology's evolution. Nevertheless, these young consumers are not only about the digital world, they prefer to purchase their makeup products in a physical store and want to be provided with an integrated in-store and online experience.

The high-end makeup brands should listen to what this generation has to say because it is not closed to the discussion. On the contrary, if the brands know how to engage a conversation, then, they will have the opportunity to learn more about their expectations as well as capture creative ideas. This generation is more receptive for an intimate discussion rather than an impersonal one. Therefore, the brands should pay attention on the available tools to communicate with this audience and stimulate its interest.

As a practical example, when the survey was promoted on social media, most of the responses collected came from the direct messages sent personally to the users rather than a swipe up link invitation. An artist from Los Angeles promoted the survey on her Instagram account counting 2,5 million followers but she did not meet the expected success. So, it is important to know your audience and how to drive its participation.

The Generation Z' core value is authenticity, which should be present at all level of the brand. The young consumers want honesty and transparency from brands while building sincere relationships with them. Then, they are conscious consumers and want brands to be responsible and sustainable to the environment, which call them to openly communicate on their mission and values. They will make a purchase if it is valuable to them and so, brands should offer the promising quality and experience. At the end, it is a lot about what brands can make this generation feel and what value can they bring to their lives.

The cosmetics industry is constantly evolving, it is a daily work to study and follow the latest launches, innovations or trends in the world of beauty. The way the Generation Z is shaping this industry calls high-end makeup brands to catch up with their marketing strategies. Several brands have already initiated the process of modernization and the implementation of new strategies. The study highlights the below efforts from high-end makeup brands as a starting point to better reach and appeal this generation.

1. Choose young brand ambassadors

High-end makeup brands already include younger ambassadors; they choose strong personalities from the Generation Z so that they introduce the brand to their generation.

2. Collaborate with beauty influencers

Many brands work with beauty influencers on social media so that their presence on these platforms grow and reaches a broader audience.

3. Work with young talents

The companies implement internal programs to allow the employees from the Generation Z' bring their talent and vision into the company.

4. Adjust the brand's values

Most of the high-end brand are already adjusting their values by promoting the Generation Z' sense of beauty, which is beauty for all.

5. Invest in a product diversification

The Fenty effect called many brands to expand their face foundation shades, which is expected from brands promoting diversity for every skin colours.

Despite the efforts employed, they are not enough to yet suit Generation Z. A brand that has adjusted its values and expanded the range of colours offered in its products did not win over this generation, because it needs to feel it, but how? There is not one solution to reach the objective, because if there was one it would mean every brand should conform to the same values and marketing strategies, whereas the Generation Z is a generation that does not encourage uniformity or conventions.

There is not only one way for high-end makeup brands to suit Generation Z' sense of beauty. Nevertheless, the study draws the following recommendations for the brands who desire to take this route. The recommendations focus on the Generation Z target to appeal their requirements and desires; however, they would not be incompatible with other generations.

1. Stay relevant

The brands should look at every piece of their organization and make sure they align with each other. Their values need to apply inside and out of the organization, their offerings should stay relevant to their target market and their ambitions should meet their abilities. An important point is to avoid a brand's inappropriate shift under the competition's pressure and the temptation to replicate trends.

The brand should engage the conversation especially when targeting the Generation Z, who expects from a brand to establish one-to-many and one-to-one conversations. The campaigns or publications on social media is a way to reach wide audiences. Then, interacting with this generation will allow you to gain insights and respond to their needs and desires. Suggestions to do so can be:

- Invite them to create content on your products or what the brand inspires them
- Recognize them as a brand ambassador, which is an exciting title that could be delivered through social media or a membership
- Deliver a platform to share feedbacks and reviews but also tips and ideas of makeup looks

A brand's essence is part of its employees, and along with the efforts to reach the Generation Z outside the organization, there should also be a focus on people inside the organization. The most relevant and appealing way to talk to Generation Z is when the generation itself speak to it. The young employees can not only be more responsible for taking part in the modernization of a company, they can also help the brand on how to talk, design the messages and choose the tools to engage the conversation with that audience. Employees from the beauty companies should constantly check the relevance of the brand through it's a brand identity, market position, market target analysis and make sure they are responding to consumers' needs and wants.

2. Stay creative

Today more than ever, brands should explore endless creativity. They should think of every creative way to design, promote or sell their products. Companies should probably go out of some traditional concepts to reach its full potential of creativity and seduce this generation with some audacity.

The ideas to embrace more creativity can be endless and apply at different levels:

- **Product:** packaging, product features, design
- **Distribution:** in-store and online experience
- **Marketing:** campaigns, ambassadors,
- **Social media:** online content, contest

A brand could invite more talents who could be anyone; consumers, employees, celebrities, beauty influencers, to suggest creative ideas around the different areas.

3. Provide experience

The Generation Z expects an experience throughout its journey with the brand. The experience should be delivered in-store as well as online. Since makeup is an art, it invites brands to use their creativeness when delivering an experience with makeup exploration and application. Going out of the box and delivering memorable experiences to Generation Z can be achieved through different ways:

- **Private events:** product launch or beauty influencers meeting
- **In-store events:** makeup training sessions or implementation of hair and makeup services
- **Social media:** publish consumers content or organize a contest

4. Provide freedom

A core value from the Generation Z is freedom, in every sense. As a consumer, the Generation Z wants to be able to choose a brand without constraints or oppression. As an individual, the young consumers want to be free to express their own personality and their own beauty.

As a consumer, Sephora reached a successful neutrally for beauty consumers who feel free to walk through different makeup brands and purchase them. A suggestion in the survey was to provide a new store designed in a such a way that it would not be organized by brands but by makeup product categories such as mascara and lipstick. The idea attracted most of the respondents and appears to appeal the Generation Z consumers but may be challenging to realize because of the competition between the brands.

The desire for more freedom in the purchasing experience and the choice of brands is wanted. Another suggestion could be to review the makeup counters in departments store where every brand's counter is separated from each other. There could be an implementation of a neutral space in between brands' counters with stands and makeup artists that could advice consumers for any makeup brand around.

5. Tell your story

Telling your story is a major key to create a relationship with the Generation Z. Every brand should tell its story to allow the Generation Z to value your brand's authenticity and existence. The young brands are successful also thanks to their backstories, and former brands should tell about theirs's. The brands' heritage should be retold to Generation Z' in an appealing and modern way.

To do so, the brand should employ the most innovative tools and channels, the higher the quality of your message the stronger the chance to reach the Generation Z. The story can be told to a large audience with the use of social media and creation of content through images, texts or videos. The creation of the story telling can very attractive through a video for which the following points will impact the Generation Z viewers to watch:

- **Quality of image** should be the highest and illustrates the brand's image
- **Video composition** should flow smoothly and make it easy to watch
- **Music** is a key part of the video montage which lead to how the brand makes you feel
- **People** presenting or telling the story should be relevant, the spokesperson should have a voice pleasant to listen to
- **Language** can be different from a brand to another, it could sound young and funny or more calm and delicate

The story of a brand can also be told through the people from inside the organization. Employees should know about the brand' story and some anecdotes that illustrates the company's path. Once the people know and can tell your story, it will allow them to transmit it to the consumers in an intimate conversation.

The study aimed at exploring the high-end makeup brands and providing recommendations on how they could suit the Generation Z. The report studied several sub topics under the field of makeup, nevertheless, there could be further researches on the following questions:

- **How can the beauty industry design and offer a unisex makeup brand to the market?**

The Generation Z' sense of beauty wants makeup to be for women and men, and even though many brands integrate the gender-neutral philosophy, there yet not a brand seen as a unisex one. Therefore, what could be the marketing strategies to design and offer a brand that is unisex.

- **What makeup concepts from other markets could be offered to the European and American consumers?**

Since the scope of the study was analysing the high-end makeup brands in Europe and US markets, a question would be to see the makeup concepts and trends on other markets such as Asia and probe how successful their practices could be in Europe and US markets.

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Appendix 1: Interview 1 Questions & Answers

Personal & Professional Experience

- 1. According to your personal experience with makeup, what is your definition of beauty?**

My definition of beauty has evolved through years, when I was younger I was using many layers of makeup to hide my imperfections. I believe that younger we are very much influenced by the opinion of others, I personally hated my freckles and took long to accept and love them. Today, my vision of beauty is to love and assume our natural beauty and highlighted it with makeup.

- 2. What are your favorite makeup brands? What are your criteria when personally buying your products?**

I like to try everything and check the new trends. I personally use Estée Lauder for its quality in face creams and face foundations, then, BECCA for its glowing highlight products and of course, Huda Beauty. Another brand I like very much is Giorgio Armani, which may not be considered trendy for younger costumers but has high-quality products.

- 3. What is the path and professional experience in the industry? What is your job today and your main responsibilities?**

At 18 years old, I started working in an agency that works with different brands. There, I learned about the brands and selling technics, I was trained to work for makeups, beauty treatment and perfumes. I worked for Dior counters during one year, then, L'Oréal spotted me and offered me the job as Counter Manager for the brand Lancôme. Few months later, they offered me to switch to the brand Urban Decay as Makeup Artist because my style and personality was more embracing that brand. Indeed, I had tattoos and red hair which embraced better the boldness of Urban Decay! Almost two years ago, I accepted my current Job at Estée Lauder Group as Retail Sales Manager for three brands; BECCA, Origins, Glamglow. Since the three brands are sold through Sephora in Switzerland, I mainly deal with Sephora's head office in Zurich the sales agreements, marketing, merchandising, inventories and negotiation of the brands' display in-stores. I also oversee the training and hiring process and monitor the financial performance of the stores in French part of Switzerland.

Beauty industry & Generation Z

4. Since you have worked for very different high-end makeup brands, how do you differentiate them and where have more seen young customers?

From my selling experiences, the philosophy at Dior versus at Urban Decay was very different. At a Dior stand, you will have a very polite approach to the clientele with “Dear Madam” or “May I show you” formulation, also, the makeup artists look alike in a clean and sober style. At the Urban Decay stand, the approach was totally urban with much more friendly talk with the customers such as “I love this color on you” “, “This is so cool”. Also, the makeup artists had their own style and applied their makeup with more creativity. When I worked for Urban Decay, the brand was just launched in Switzerland and it was so trendy, so, I have seen more young customers there than at Dior because they were into the trend and wanted brighter colors in their Makeup. However, I must say there are no boundaries for consumers, they will almost always use more than one brand; I have seen a teenager girl buying a face foundation at Dior stand and her eyeshadow palette at Urban Decay.

5. What are the advantages or disadvantages from selling at one brand makeup counter versus selling at Sephora?

In the makeup industry, selling only one brand limits a lot the choices provided to the customers. Moreover, since you have performance objectives, you may end up forcing sales or selling something that was not fulfilling the need or desire of the client. Sephora has strong advantages; they are a multi-brands makeup store and are a leader in the distribution of high-end makeup worldwide. Therefore, Sephora provide the freedom to choose between all the brands they sell and since the consumers’ traffic is important the brands reach a greater audience. Since Estée Lauder closed a distribution deal with Sephora in Switzerland, sales increased significantly!

6. Does Estee Lauder put efforts to appeal and reach the Generation Z?

I can identify the efforts put in slogans and visuals to captivate the Generation Z audience. Typically for the brand too faced, they named their last mascara “Damn Girl”, which is very catchy and young language.

- 7. Fenty launched the 40 shades of face foundations and expanded to 50 now, I checked BECCA offerings and counted 42 shades in their face foundations. Do you believe it is relevant for every brand to put the same effort?**

Having a large range of shades of one face foundation product is an ambitious goal. A light skin is different from a dark skin and each will have different needs, the complexion and the formula to reach so that it works on all type of skin is hard to find. I remember at the launch of Fenty how successful it was for women of color, but less satisfying for light skin for which the result was too dry. I believe brands should offer products with the optimal quality they are able to offer, offer as much diversity as they can and stay relevant to their market target.

- 8. Estée Lauder, has implemented a Reverse-Mentorship Program in which older executives are paired with employees from Millennial and Generation Z, this way they can better understand and offer products appealing to that audience. Have you heard of this program and what can you tell about career opportunities for young talents?**

I don't know more about this program but I can notice how more open Estée Lauder is to provide open doors to career plans and positions with higher responsibilities for young talents. I have already received emails explaining me the opportunities to grow internally, I was not interested to take any step further for now. Another email I have received is Estée Lauder asking employees if they have ideas for new project or product.

Also, I can feel the youth around me more today than at my beginnings. When I first started, my young age was often a barrier for me in this industry, brands wanted more experienced staff to advise and sell products to their clientele. Probably because of a younger clientele, I can feel today more and more young talents hired as makeup artists as well as in position of higher responsibility.

Animal Testing

9. What is your personal view on animal testing?

I support the end of animal testing; however, it won't influence my purchasing decisions and I might buy brands that are not cruelty-free.

10. In your professional experience, have you seen young consumers caring about the products components and looking for vegan or cruelty-free products only?

Yes, especially young consumers are caring about the products components. Teenagers want healthy products and look for the ones that don't give them pimples. Today, thanks to the technology, there are apps such as "Clean Beauty" you can upload on your smartphone and when in-store consumers are able to scan the ingredients information so that the app tell them if the products contain any controversial ingredient or allergen. They are also more likely to choose brands that are cruelty-free certified, I've seen young consumers turning back a product that was not.

Appendix 2: Interview 2 Questions & Answers

Personal & Professional Experience

- 1. According to your personal experience with makeup, what is your definition of beauty?**

My definition of beauty is putting forward the best version of myself through make up, hair and overall style.

- 2. What are your favourite makeup brands? What are your criteria when personally buying your products?**

I personally look at brands that offer an experience. When I am buying make up, it is usually something that I have seen on Instagram and I know how it is applied and what is the outcome or expected look. My favourite make up brands today are Clarins, especially for its face foundation, then, Urban Decay, Tarte and Kyle Cosmetics.

- 3. What is the path and professional experience in the industry? What is your job today and your main responsibilities?**

I started at Clarins Group as an Intern after finishing my university in 2006, I was in the fragrances department doing mainly merchandising recommendations. At the end of my internship, I was promoted to Sales Manager in charge of Germany, Turkey and Scandinavia. My role was to manage our field force (sales team) and make sure that in store executions were done currently. In 2010, I was promoted to Area Manager in the Export department and was in charge of developing our brands in emerging markets in Europe. In 2015, I was promoted to General Manager and in charge of the entire Export Europe department. Finally, in 2018, I was promoted to General Manager of the Travel Retail EMEA which is the 5th biggest market for the Clarins Group. Today, I run a team of 35 people in the Geneva office and 260 people in the field.

Clarins & Generation Z

4. What is the main target market of Clarins makeup? Why Clarins Makeup is not currently targeting the Generation Z?

The main target for Clarins is make up that enhances your own beauty which is why we have the claim “you, only better”. We have products that have a skincare benefit and our formulas are based on our expertise with is Plants. Our average age is approximately 40 years old and Generation Z is currently not our client. It is something we are working on with our new range which is calls “My Clarins” and which is catering to a younger age group.

5. What may be the reasons that Clarins is currently not appealing the Generation Z? How could you explain this apparent gap for reaching this young audience?

Clarins is more known as a brand for Anti-Aging expertise, which is not something that the Generation Z are concerned about. Moreover, like most traditional skincare brands, we have not been active on social media in the past but we are working on developing the digital aspects of the brand.

6. What do you believe Clarins has to offer to this Generation Z? What value can it bring to a young audience?

Clarins can offer great skincare products with the best-known formulas and ingredients. There is no age when to start taking care of your skin. All our cleansers, toners and moisturizers can cater to the Generation Z.

7. In your opinion, what are the adjustments to do for Clarins to become a brand appealing to Generation Z? What can the beauty industry do to better suit that young audience?

We need to step up our presence in social media and work with the right influencers and KOL (Key Opinion Leaders). The brands having a consumer generated content on social media have Generation Z' attention. Then I believe the experience delivered by the brand is a major key to attract consumers, there are more and more creative ways to sell your products. If you study new selling concepts in the Asia market and see how successful they are, it would not be surprising to see them coming in the European market too.

- 8. Since Clarins identified the need to reach the younger generation for skincare products, why did they not apply the same efforts in their makeup line? Is Clarins planning to take actions to reach the Generation Z, is there any strategy on the way?**

With goal to offer products that are appealing the Generation Z, we launched “My Clarins”, and one of the way to promote is not only through the presence on social media but also by reaching our current consumers, where mothers could recommend the new line to their daughters. Otherwise, we are working to implement the same efforts for makeup too. We have already “modernized” all our products and we are working on expanding our range, but there is no more information that we can share for the moment.

- 9. One of Clarins’ main competitor, Estée Lauder, has implemented a Reverse-Mentorship Program to modernize the organization with younger employees’ guidance. What are Clarins’ efforts to attract and retain young talents?**

We have a similar program but which is implemented in the Headquarters in Paris and not in the regional offices, moreover, we do offer career paths for young graduated.

- 10. Does Clarins encourage the young employees to take more responsibilities and express innovative ideas? If so, how Clarins is currently providing these chances?**

I have in place a “Shadow Committee” which is kind of an executive committee of people under 30, the members meet and discuss issues that we face in business. Their job is to submit solutions and I may decide to apply or not the suggested solutions.

- 11. From your professional experience, what can you notice as evolution in the beauty industry related to the Generation Z?**

If you look at the top 10 makeup brands today, most them didn’t even exist 10 years ago. The brands that are developing the best with the Generation Z are those that have been launched through social media and were never present in tradition distributions. This shows how the Generation Z is only considering these platforms (Instagram, Snapchat, Pinterest) to gain insight on products. This is something that all brands need to pay attention to.

Animal Testing

12. What is your personal view on animal testing?

Personally, I am against it and so is the company that I am employed in.

13. What is Clarins' policy on animal testing? How could Clarins appeal to consumers looking for vegan or cruelty-free certified only?

Clarins does not animal testing and is for the elimination of such practice. However, we are bound to different legal legislature such as China, who requires by law to do animal testing. There are few or no brands that can survive without being present in such a huge booming market like China. So, it is up to the Chinese consumers to fight for their government to stop the animal testing. All Clarins products are cruelty free and most products do not have any animal ingredients apart from Honey and Wax (which is needed for make up). If we take out these two ingredients, we are considered Vegan.

14. What efforts Clarins put in place to support the elimination of animal testing, if any?

Clarins is one of the brands that is chosen by the Chinese government to work on alternative methods for them to carry out of the animal testing. This will be eliminated in the very near future even in China.

Appendix 3: Survey Questions

Generation Z & High-end Makeup Brands

1. What is your birth year?

2. What ONE word best describe your vision of beauty?

- ☐ Perfection
- ☐ Imperfection
- ☐ Other

3. Rank the listed brands in your preference order

- ☰ Dior
- ☰ Urban Decay
- ☰ Fenty
- ☰ Yves Saint Laurent
- ☰ Benefit
- ☰ Estée Lauder

4. Where do you most often purchase your makeup?

- ☐ Physical store
- ☐ Online store

5. In which state of mind do you most often go in-store?

- ☐ I already know which product I want to buy
- ☐ I go explore, test and buy the products
- ☐ I go explore and test products only

6. Rank the places for purchasing your makeup in your preference order

- Physical store
- Online store
- Pop-up store
- Instagram shopping

7. Rank the sources you trust most when purchasing your makeup

- Family and friends
- Makeup artists
- Sales people
- Beauty Influencers
- Celebrities

8. What factors matter the most when purchasing your makeup?

- | | |
|-------------------------------------|---|
| <input type="checkbox"/> Price | <input type="checkbox"/> Brand Image |
| <input type="checkbox"/> Quality | <input type="checkbox"/> Beauty Trends |
| <input type="checkbox"/> Packaging | <input type="checkbox"/> Product Components |
| <input type="checkbox"/> Experience | |
| <input type="checkbox"/> Other | |

9. Do you actively check brands' policy on animal testing before purchasing their products?

- ☐ Yes
- ☐ No

10. If you discover the brand you are about to purchase does animal testing, do you cancel your purchase to switch with a cruelty-free certified brand?

- ☐ Yes
- ☐ No

11. Select the values high-end makeup brands should embrace to attract you

☐ Authenticity

☐ Genderless

☐ Fun

☐ Freedom

☐ Diversity

☐ Boldness

☐ Other

Generation Z & High-end Makeup Brands

What can brands offer to better appeal you?

12. "Instagrammable moments" in-store

☐ Yes

☐ Maybe

☐ No

13. Pop-up store with exclusive experience such as meeting beauty influencers or celebrities

☐ Yes

☐ Maybe

☐ No

14. A store organised by makeup products rather than by brands; you would have one stand for mascaras another for lipsticks

☐ Yes

☐ Maybe

☐ No

15. A late night opened store where you get makeup and hair done before going out for an event

☐ Yes

☐ Maybe

☐ No

16. Training sessions with makeup artists teaching you how best to apply your makeup yourself

☐ Yes

☐ Maybe

☐ No

17. A service for booking makeup artists for important events (wedding, birthday party, baby shower)

- ☐ Yes
- ☐ Maybe
- ☐ No

18. Do you have ideas to propose?

Generation Z & High-end Makeup Brands

Personal data required for statical purpose

19. What is your gender?

- ☐ Female
- ☐ Male

20. Where do you live?

- | | |
|------------------------------|-------------------------------------|
| <input type="radio"/> Europe | <input type="radio"/> South America |
| <input type="radio"/> USA | <input type="radio"/> Asia |
| <input type="radio"/> Canada | <input type="radio"/> Africa |

21. Which country/state do you live in?