# LA ROCHE-POSAY'S PATH TO THE LEADERSHIP OF THE DERMOCOSMETIC MARKET

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# ABSTRACT

DISSERTATION TITLE: "La Roche-Posay's Path to the Leadership of the Dermocosmetic Market"

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PURPOSE: The dermocosmetic sector has suffered many changes in the last years, not only due to the intense competition and innovation in the market, but also the most recent alterations in consumer behavior due to the latest COVID-19 pandemic that is expected to have a long-term effect in the habits of purchase.

With the explosion of the e-commerce market, consumers seeking for alternatives to the pharmacy channel, now have access to dozens of options. The online distribution of dermocosmetic is carried out by big ecommerce players, e-stores, online pharmacies and online stores from modern distribution (like Wells).

With the challenge of becoming the number one brand in the dermocosmetic market, La Roche-Posay will need to balance all profiles of the market, from their priority with the pharmacy channel, the growing modern distribution (parapharmacies) and the booming ecommerce channel.

METHODOLOGY: Data was collected from 180 respondents mostly from the Lisbon Area using a survey, conducted through Qualtrics. The survey focused on three sections to firstly analyze the respondent's perception of the dermocosmetic market, followed by the brand awareness of La Roche-Posay and closing with social-demographic data.

In a further moment of research, a focus group was conducted to get more information concerning the initial findings of the survey.

Concerning the dermocosmetic market information, IQVIA was used to extract the Sell-Out data of the market, its evolution and main players.

KEYWORDS:

i) Dermocosmetic Market, Suncare, Bodycare, Acne, Dailycare
ii) Pharmacy, Parapharmacy, Ecommerce, Modern Distribution
iii) Pandemic, Covid-19
iv) Consumer Behavior, Habits, Competitors
v) Dermocosmetic Trends, Social Media influence

# RESUMO

TÍTULO DA DISSERTAÇÃO: “La Roche-Posay’s Path to the Leadership of the Dermocosmetic Market”

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OBJETIVO: O mercado dermocosmético tem sofrido muitas mudanças nos últimos anos, não só devido à intensa competição e inovação no mercado, mas também, às mais recentes mudanças no comportamento do consumidor devido à última pandemia de COVID-19 que se espera ter um efeito de longo prazo nos hábitos de compra do consumidor.

Com a explosão do mercado de e-commerce, os consumidores que procuram alternativas ao canal farmácia, têm agora acesso a dezenas de opções. A distribuição online de dermocosméticos é realizada por grandes “e-commerce players”, “e-stores”, farmácias online e lojas online de distribuição moderna (como a Wells).

Com o desafio de se tornar a marca número um no mercado dermocosmético, a La Roche-Posay precisará de consolidar todos os perfis de mercado, desde a sua prioridade com o canal de farmácia, o crescente canal de distribuição moderna (parafarmácias) e o e-commerce.

METODOLOGIA: Os dados foram recolhidos a 180 inquiridos maioritariamente da Área de Lisboa através de um inquérito, realizado através do Qualtrics. O inquérito dividiu-se em três seções, em primeiro, analisando a perceção do inquirido sobre o mercado dermocosmético, seguido da notoriedade da marca La Roche-Posay e concluindo com dados sociodemográficos.

Num momento posterior da pesquisa, foi realizado um focus group para obter mais informações sobre os resultados iniciais do inquérito.

No que se refere à informação do mercado dermocosmético, foi utilizado o IQVIA para extrair os dados de Sell-Out do mercado, a sua evolução e principais concorrentes.



PALAVRAS-CHAVE:

i) Mercado Dermocosmético, Solares, Corpo, Acne, Proteção Diária
ii) Farmácia, Parafarmácia, E-Commerce, Distribuição Moderna
iii) Pandemia, Covid-19
iv) Comportamento Consumidor, Hábitos, Competição
v) Tendências Dermocosméticas, Influência das Redes Sociais

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# INTRODUCTION

La Roche-Posay is part of the Active Cosmetic Division from L'Oréal group whose focus is creating skincare solutions for even the most sensitive skin. The brand has become the number one brand worldwide, recommend by more than 90.000 dermatologists.

The number one reality does not happen in the Portuguese market, where the leadership has been taken by Avène for many years, another dermocosmetic brand that share similar purpose to La Roche-Posay and part of the rival manufacturer, Pierre Fabre. Avène benefits from their national distribution in the pharmacy channel, their consumer loyalty and continues its growth with their strong promotional strategy in the point of sale, star products like Cicalfate and major innovation throughout the years.

The current scenario for the dermocosmetic market has also been affected with the latest occurrences in the world, from the COVID-19 pandemic, Ukraine-Russia conflict, and the worldwide inflation. All these have affected the consumers' behavior, who are now looking for more natural and sustainable products, the increase cost of raw materials and production costs and many other limitations that will be addressed throughout this thesis.

Finally, some of the main categories of the dermocosmetic market have been dependent on heavy promotion and are currently less valued by the consumer. Manufactures like Pierre Fabre and L'Oréal now have the difficult task to value these categories and to not depend so much on the promotional cut on price or different offer.

## Problem Statement

The main questions that this dissertation aims to address are: Is La Roche-Posay goal to achieve leadership possible? How can the brand recover its main categories (Body and Suncare) from its heavy promotion dependency? What are the changes in the consumer profile from the pandemic and most recent global events? What are the main differences between the modern channel and the ecommerce channel?

## Research Questions

RQ1: Can La Roche-Posay achieve the goal of leadership in the Portuguese dermocosmetic market?

RQ2: What are the main consequences from the most recent pandemic and political instability in the dermocosmetic market?

RQ3: Who is the new dermocosmetic consumer from the post COVID-19 pandemic?

# LITERARY REVIEW

This chapter has the objective of underlining more information concerning the dermocosmetic market to the reader, not only through its definition but also the key factors that have been making changes in it.

Here will be presented an overview from the latest trends in the market and the consequential usage of more natural ingredients, the fast-passed changes in the consumer behavior and consumer needs of this market and the impact of the most recent COVID-19 pandemic. Social media is also approached to understand its influence for the body image.

In the end of the chapter, it is also discussed in more detail the pharmaceutical channel, focusing its digital limitations and the vital ethical role for consumers.

## Trends on Dermocosmetic Market

Dermocosmetics have taken a new role in dermatology being allies to help in many skin disorders throughout the development in technology and science. Dermocosmetics are now considered a branch of dermatology not only helping with maintaining the aesthetic appearance and feeling of well-being to the skin but also regularly used to improve photoprotection, dry or aged skin, inflammatory skin disease such as acne, rosacea, atopic dermatitis, psoriasis, and seborrheic dermatitis and a variety of hair and nail disorders (Dreno, 2014).

Due to these recent advances in technology and increase knowledge of skin physiology, cosmetics have been propelled into new levels of scientifically designed products. Furthermore, these advances have also led to new and strict guidelines for the development and testing of this cosmetics almost like the ones used for pharmaceutical products (Dreno, 2014).

## Sustainability has a Key factor for the Future

In these past years, sustainability has also received more attention from the consumers, the cosmetic industry, and many organizations. Both consumers and producers are exploring more the usage of natural cosmetics, including natural resources and materials (Amberg, 2019).

Sustainability has an important role throughout all the product life cycle, from the selection of the raw materials but also the ingredients, packaging, and after-consumption waste (Bom, 2019).

Due to this increase attention regarding sustainability, consumers are more aware of brands using this as a marketing tool or to distinguish their product from their competitors leading to some accusations like greenwashing.

Consumer confidence can be destabilized by different standards, different concepts, and exaggerated marketing of green cosmetics (Lin, 2018).

The usage of more sustainable practices; from the selection of ingredients to the formulation of products, could jeopardize the performance of the product, with several studies about natural and green ingredients being selected over unsustainable synthetic ingredients that show conflict in their performance (Bom, 2019).

Besides this, the concept of sustainability in dermocosmetics needs to be refined, because not all natural and organic raw materials and ingredients can be defined as sustainable. To accomplish a greener journey, dermocosmetic brands need to ensure the functionality of their products aligned with natural ingredients, more sustainable processes, and packaging and all the pattern of consumption (Bom, 2019).

Current Trends in the Dermocosmetic Market

As previously mentioned, the advances in medicine have led to a higher life expectancy. With these advances, the consumer has also gained the want and need to appear younger and healthier by reducing the visible signs of aging, which consequently, have made the cosmetics market grow exponentially (Brandt, 2011).

According to the study made by J. Meng and P. Pan in 2012, one of the most significant and recent factors for the engagement of young female consumers of dermocosmetics is the perceived information utility of the cosmeceutical product and the consideration of their self-evaluation on body-esteem. Evidence in the study also states that, consumers with low body self-esteem became a vulnerable group that might be influenced by dermocosmetics product advertising. The young female consumers' attitude towards dermocosmetics advertising, their interest in reading ads, product claims' effectiveness and perceived utility are all positively associated with the intention and desire of purchase (Meng, 2012).

Consumers around the world have also developed different needs in terms of cosmetics, coining a new term in this industry: ethnic cosmetics. For example, Asian/Pacific consumers look for products that whiten their skin while African American consumers search products that address uneven skin tone, acne, or even hyper-pigmentation. Consumer good companies have also tried to give a regional twist to global brands by making hands meet with the regional trends, developing exclusive products and implementing specific e-business strategies (Kumar, 2005).

According to the term coined by Dr. Albert Kligman, “cosmeceutical” refers to a hybrid category of products between drugs and cosmetics that have exert a pharmaceutical therapeutic benefit, such as moisturizers, retinoids, antioxidants, and depigmentation agents. In the cosmeceutical reality, the most recent trends include skin protection from radiation and oxidant damage with a usage of nonirritating ingredients, due to sun exposure being the number one source of aging for the skin. Besides this, also retinoids and other antioxidants have gained traction in the market like niacinamide, idebenone and alpha lipoic acid (Brandt, 2011).

Focusing on the sunscreen cosmetic market there are also new trends to identify like the usage of organic and inorganic UV filters and some botanical ingredients. The consumer also demands a variety of comprehensive formulations, providing long lasting protection, high stabilized formulas, vitamins contributing all for a higher SPF (Sun Protection Factor).

The texture of the sunscreen products is now also looked by the consumers for its light textures or non-stickiness to be used in sport and water activities or warm and humid climates (Ngoc, 2019).

For Luxury Cosmetics Companies, experiential marketing has become more successful from distribution of free samples, exclusive distribution channels, exclusive launches to gift promotion, creating an online community, betting on expert services, or investing in flagship stores. All these techniques have enriched the brand experience for the consumers.

Word of mouth online, marketing events and storytelling are the drivers of the creation of a better consumer feeling and experience and are also key factor to maintain a bigger engagement with the consumer on the after-purchase moment (Dhillon, 2022).

Nanotechnology has also become a strategic investment in this industry for many of the main players of the market, with L'Oréal spending over 600 million dollars in research on nano-patents. Laser treatments have slowly become more affordable throughout the years and a considerable option for many consumers, even though it has greater cost and greater risk than cosmetic products. Regarding the rise of other competitors, both private label cosmetic brands and doctor brands have been increasing their market penetration and gaining significant market share (Brandt, 2011).

COVID-19 Impact in the Dermocosmetic Market

Taking a broad approach to the impact of Covid-19 in the consumer behavior, it is important first, to analyze the context which can disrupt the consumer habits.

With this pandemic many immediate changes were identified, such as the habit of hoarding, consumers stockpiling essential products, improvisation or postponing the purchase and consumption of discretionary products/ services. During the pandemic many consumers adopted several new digital technologies and looked for online channels as a response for the many offline options that were closed during the pandemic (Sheth, 2020).

Taking all this into account, consumption after COVID-19 became time bound and location bound, with little flexibility regarding time but high demand concerning location. Consumers are now also more informed about the products, more adaptable to new technologies and more used to the idea of the store coming to the consumer (online channels) (Sheth, 2020).

For the dermocosmetic reality, amid COVID-19 there was a general drop in the cosmetic usage, especially in the skincare category. Many retail stores and beauty and fragrances stores were closed during the peak pandemic, with a big decrease in the global makeup market, lip cosmetics, cosmetic applicators, and cosmetic gift sets (Gardner, 2021).

Concerning the use of makeup, consumers have also become more receptive to not wear makeup daily and to go for a more natural look, which can lead to changes in the cosmetic industry (Gardner, 2021).

Some consumers in the wake of the pandemic were concerned when sharing a cosmetic product to carry the virus. This made the consumer stricter towards its hygiene standards and sanitization of the products (Mohammed, 2021).

The explosion of online channels during the pandemic in the cosmetic industry, as also made it almost mandatory for any brand to expand into e-commerce and extend their online presence to understand the consumer behavior and build loyalty (Safari, 2022).

Social Media Impact on Body Image and Dermocosmetics Industry

The concept of beauty has been changing throughout the decades in our society. The media has also been one of the most influential for this concept where the supposedly perfect body image has been portraited in different channels from magazines, television, videogames to social media.

Traditional mass media view of the body image has been creating the unhealthy portraits of our body: the ultra-thin image for young women and extremely muscular men, have played a big part in this dissatisfaction. Most recently, social media has the potential to present the same threat on a more diverse scale of both female and male bodies, with the consequence of engaging in a like-minded community that can lead to reinforcement of this perspectives. The complete opposite can also happen with individuals being exposed to other individuals that share positive messages regarding body dysmorphia and acceptance that is not normally shared via traditional media (Andsager, 2014).

For brands, there is a lot of potential through communication in social media from improving the customer relationship to finding niches to innovate and co-create with their community (Arrigo, 2018).

Even with this potential, some brands lack naturality and authenticity, finding it difficult in sharing their message effectively with increase skepticism for their consumers (Andsager, 2014). Therefore, cosmetic brands need to develop their relationship with consumers to generate loyalty. Those who become "brand lovers" tend to engage in social media with the brand by following, liking or commenting on their brand pages (Binwani, 2019).

Like the reality that cosmetic medicine has been facing in social media, dermocosmetics have been gaining a lot of attention from trends of showing the usage of products, skincare routines and the demonstration of transformation from severe acne conditions. This has led to the increase of consumption of these products but also the willingness of the consumer to make more permanent decisions concerning their skincare like cosmetic procedures (Daws, 2022).

## The Pharmaceutical reality: Digital Presence and Ethical Reality

Since the pharmaceutical channel represents the biggest share of dermocosmetics distribution, it is important to mention how this channel has been growing in the last years.

The pharma industry has had a difficult time to adapt to the growth of the digital marketing, due to primarily not being allowed to sell prescription drugs online. Besides this, many lack proper vision for implementation of digital marketing solutions, lack skillful workforce and have no driven digital change and poor maintenance of their digital presence (Parekh, 2016).

Consequently, with this off-side, many pharmacies don't want to invest in the development of their online channels, limiting the progress for dermocosmetics brands and justifying the growth of alternatives like pure e-players, e-commerce websites and modern distribution (Parekh, 2016).

Regarding the ethical concerns for pharmaceutical marketing, it shares a similar reality towards the dermocosmetic brands. Even though, the main goal of their practices is to make products more profitable, it is vital to seek to inform and educate the consumers (Bélisle-Pipon, 2022).

Concerning the practices not all are equally ethical for the consumer when comparing it with moral arguments, like providing meaningful and efficient consumer information, promoting education and empowering consumers to make informed and autonomous choices.

Taking this into account, pharmaceutical marketers need to be supported and equipped with a higher level of ethical standards for their everyday practice, helping regain public support concerning the communication about both pharmaceutical drugs and dermocosmetic products (Bélisle-Pipon, 2022).

## CASE-STUDY

### 1. Introduction

The goal of this case study is to present the contextual background of the challenge that La Roche-Posay has in the portuguese market. Starting by L'Oréal's global reality tapering to the national market, with a focus on the latest trends of the different dermocosmetic channels and biggest players and manufacturers.

The case study also emphasizes on La Roche-Posay's history and portfolio and the brand's current reality in the market in contrast to its main competitors.

To conclude this section, the case study exposes the challenge of the brand with a bigger focus on its duality with Avène.

### 2. L'Oréal in the Global Dermocosmetic Market

According to the most recent finance report from L'Oréal, in 2021, the estimated value of the cosmetic market was more than 228 billion euros, with a growth rate of approximately 8%.

The cosmetic market is composed by 5 different business segments: skincare, haircare, makeup, fragrances, and hygiene products. With a growth rate bigger than 7%, skincare, the focus of this case study - represents more than 41% of the total cosmetic market and is the main driver of this industry.

With 32,28 billion euros in sales, L'Oréal's continues being the number one brand in the world, with an historic year in 2021, benefiting from a growth of more than 16%, twice the cosmetic market growth and a very strong increase in profits.

The other 2 main players of the market are Unilever with more than 22 billion euros in sales and Estée Lauder with more than 14 billion euros in sales in 2021.

L'Oréal divides itself in 4 main divisions in the cosmetic market:

- L'Oréal Luxe (including brands like Lancôme, Yves Saint Laurent and Giorgio Armani)
- Consumer Products (including brands like L'Oréal Paris, Maybelline and Garnier)
- Active Cosmetics (La Roche-Posay, Vichy, CeraVe and Skinceuticals)
- Professional Products (including brands like L'Oréal Professionnel, Kérastase and Redken)

This case study will have a deeper look in the Active Cosmetic Division.

The Active Cosmetics Division is the leader of the dermocosmetic market, offering a range of products linked to beauty and health of the skin with brands with very different price points.

Worldwide, this division registered a growth of more than 31% and represents 12,2% of the total sales of L'Oréal.

**SALES BY OPERATIONAL DIVISION AND BY GEOGRAPHIC ZONE**

| | | | | | 2020/2021 progression | |
|---|---|---|---|---|---|---|
| *€ millions* | 2019 | 2020 | 2021 | % 2021 sales | Like-for-like | Reported figures |
| **By Division** | | | | | | |
| Professional Products | 3,441.9 | 3,097.3 | 3,783.9 | 11.7% | +24.8% | +22.2% |
| Consumer Products | 12,748.2 | 11,703.8 | 12,233.5 | 37.9% | +5.6% | +4.5% |
| L'Oréal Luxe | 11,019.8 | 10,179.9 | 12,346.2 | 38.2% | +20.9% | +21.3% |
| Active Cosmetics | 2,663.7 | 3,011.1 | 3,924.0 | 12.2% | +31.8% | +30.3% |
| **Group total** | **29,873.6** | **27,992.1** | **32,287.6** | **100%** | **+16.1%** | **+15.3%** |
| **By geographic Zone** | | | | | | |
| Europe | 10,186.8 | 9,199.3 | 10,184.8 | 31.5% | +10.1% | +10.7% |
| North America | 7,567.0 | 6,903.4 | 8,155.9 | 25.3% | +22.2% | +18.1% |
| North Asia | 7,908.2 | 8,318.1 | 9,863.3 | 30.5% | +17.6% | +18.6% |
| SAPMENA – SSA[1] | 2,438.5 | 2,101.9 | 2,312.0 | 7.2% | +13.9% | +10.0% |
| Latin America | 1,773.1 | 1,469.3 | 1,771.5 | 5.5% | +20.6% | +20.6% |
| **GROUP TOTAL** | **29,873.6** | **27,992.1** | **32,287.6** | **100%** | **+16.1%** | **+15.3%** |

*(1) SAPMENA – SSA: South Asia Pacific, Middle East, North Africa, Sub-Saharan Africa.*

*Graphic 1: L'Oréal Sales by Operational Division and Geographic Zone from 2019 and 2021 (data collected from L'Oréal Finance Report)*

## 3. Portuguese Reality, Consumer Behavior and most recent changes

In the Portuguese reality the skincare market is separated through several channels, with the main ones being mass-market, pharmacies and parapharmacies, drugstores, perfumeries, and the most recent fast growing e-commerce business.

For the dermocosmetic brands that we are going to be focusing on this case study, their distribution does not happen in the mass market, even though this distribution channel has the highest share in skincare and benefits from more affordable prices. The two main markets are pharmacies and parapharmacies (including modern distribution).

The main categories from this market are Face Care (including the Soin Visage, Anti-Age and Daily-Care segments), Sun Care, Body Care, Hair Care and Acne.

Regarding the Portuguese consumers, they have increasingly been looking for more specific skincare products that create a new consumer journey towards the pharmaceutical channel.

The more personalized service, the trusted advice, prescription option, the specialized skincare products, and the growing information on social media about many brands make this a more appealing market to many consumers when comparing with the mass market.

The positive worldwide growth is also felt in Portugal, with the dermocosmetic market registering around 270 million euros in sales in 2021 which represent a growth of 14% comparing it to the previous year. (IQVIA Market Data 2022)

The market has also been shifting its market share between the two main distribution channels. Comparing values between 2021 and 2022, there was an increase of almost 15 million euros in the parapharmacy market becoming the fastest growing channel, where Wells is the main driver of this growth in the past years. (YTD July IQVIA Market Data 2022)

Looking into more detail concerning the pharmaceutical channel, in the last years it has changed a lot. In the previous years, the selling point were the ingredients of the product, its benefits, and molecules and now the perspective has changed, and the center of the attention is pharmacy as a sustainable and profitable business. Priority is now managing stocks, supplying a broad offer to his consumers and tracking Sell-Out growth.

Groups of pharmacies have also changed the industry in Portugal and now represent most of this distribution channel. While a sales representative of a specific manufacturer or brand used to have a familiar relationship with the pharmacy, nowadays aims to provide a stronger business proposal with a yearly plan of the brands sales, promotions, and innovation for the client.

In the most recent years, especially due to the COVID-19 pandemic and the War in Ukraine, both inflation and the rising prices of raw materials created some uncertainty and instability on some of the pharmaceuticals. Some pharmacies used to order products once, every 3 months and now are switching to monthly orders.

## 4. The biggest Manufacturers of the Dermocosmetic Market in Portugal

According to the most recent data from IQVIA YTD July 2022, the top 4 manufacturers of this market were Cosmética Ativa (L'Oréal's division), Pierre Fabre Dermo, Naos Portugal and Isdin Portugal.

Cosmética Ativa is composed by four different brands: La Roche-Posay, Vichy, CeraVe and SkinCeuticals. Both La Roche-Posay and Vichy belong to the top 5 players of the full market.

Pierre Fabre, the 2$^{nd}$ biggest manufacturer, is composed by mainly Avène, Klorane, Aderma, Ducray and Rene Furterer, with other smaller brands in this market. Avène is currently the leader of the dermocosmetic market in Portugal.

Naos Portugal main brand in the market is Bioderma that occupies a spot in the top 5 brands of the full market and Isdin Portugal is composed exclusively by Isdin.

## 5. L'Oréal's Reality in the Portuguese Dermocosmetic Market

Like the global perspective, L'Oréal Portugal is the manufacturer leader of this market with a total of more than 46 million euros in Sales in 2021 that represent a growth of around 16%, faster than the market's evolution.

Due to its dimension, the company has it harder on expediting some processes and adapting to specific clients due to the number of parameters and bureaucracy needed to be respected, such as the opportunity of launching exclusive products or specific commercial deals. L'Oréal benefits from their financial capacity, strong investigation and constant launch of products but lacks on the flexibility that some smaller brands benefit from.

One other factor that marks the Active Cosmetic division is its bet on the online and modern distribution channel, that is seen by some pharmaceuticals as the biggest threat of their business and heavily criticize its competitive price.

## 6. La Roche-Posay: History, Portfolio and Market Evolution in Portugal

La Roche-Posay is a dermocosmetic brand, originated in France in 1975 working in partnership with dermatologists to develop skincare products that used the thermal water from the town of La Roche-Posay in France, recognized in 1913 by the French Academy of Medicine for its unique skincare properties.

This thermal spring water is rich in minerals and oligo-elements for sensitive skin, and it has a natural high concentration of selenium, essential for human biological equilibrium.

La Roche-Posay has conducted more than 600 clinical studies on 90.000 patients, from different ages, ethnicities, and varied skin pathologies. (L'Oréal Groupe – La Roche-Posay)

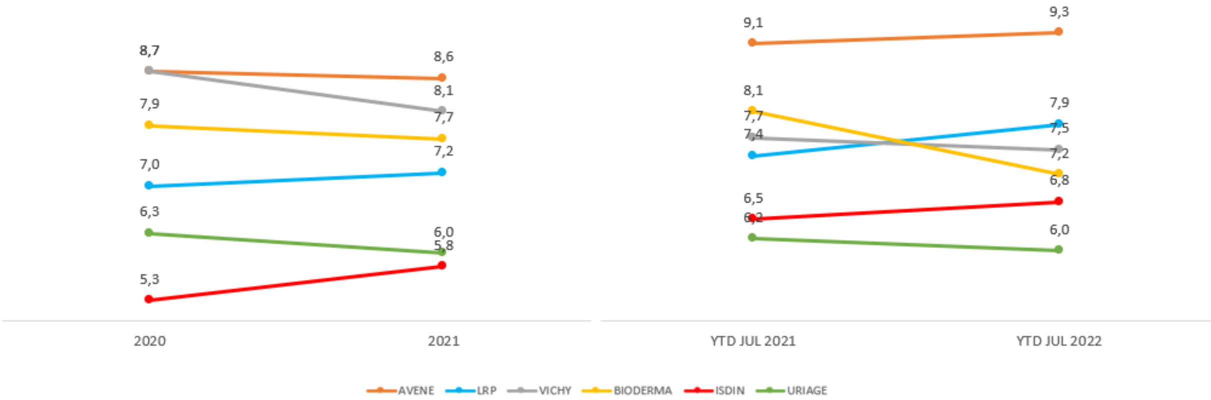
In the last couple of years, the brand has been innovating its strategy through investment in health tech. In 2016, it launched the first stretchable skin sensor to monitor UV exposure followed by Effaclar Spotscan in 2019, the first web app co-developed by dermatologists that works with AI to analyze acne-prone skin and then give recommendation of the most suitable product. (L'Oréal Groupe – La Roche-Posay).

From the data collected in 2022 (Year to Date July) La Roche-Posay has become the biggest brand of the Active Cosmetic Division (within the brands of L'Oréal) in Portugal, following the worldwide tendency in other countries.

The brand has several product lines ranging from Suncare, Anti-Age, Bodycare and many more. The main franchises from the brand are: Anthelios, Lipikar, Effaclar, Hyalu B5, Cicaplast and Toleriane.

Further analysis at the most recent data from 2022 shows that the best-sellers of the brand in the full market are Hyalu B5 Serum, Effaclar Duo+ Gel, Effaclar Gel Limpeza, Lipikar Baume AP+M and Vitamin C10 Serum. (YTD July IQVIA Market Data 2022)

Considering the top brands' performance in the dermocosmetic market, while Avène continues to have a steady leadership of the market, Bioderma has been losing share in this most recent data from 2022.




*Graphic 2: Market Share Evolution from the Dermocosmetic Total Market in Portugal, according to data from IQVIA (data collected from 2020, 2021 and most recent data from 2022)*

La Roche-Posay has also registered a successful first semester in 2022 achieving the second position for the first time. Isdin and Uriage continue having a steady growth remaining in the top brands of the dermocosmetic market.

From the analysis of the dermocosmetic market through the two main channels we can see a strong difference between the leadership of market share of the main players. While in the pharmacy distribution channel the leadership is clear for Avène, in the parapharmacy channel this brand loses its leadership and occupies the 3rd position, with Vichy having the biggest market share of Parapharmacy.

In the relationship between La Roche-Posay and Avène, the gap between the two brands has been decreasing due to the high performance from LRP in the parapharmacy market registering a growth of 40% in this channel comparing to 2021.

Bioderma and Vichy are the only top brands that have a negative evolution, specifically in the pharmacy distribution channel.

| **Dermocosmetic Market Pharmacy** | | | | |
|---|---|---|---|---|
| | **2021** | **YTD 2021** | **YTD 2022** | **Ev(%)** |
| **MS Avene** | 8,8% | 9,5% | 9,2% | 5,4% |
| **MS Bioderma** | 7,9% | 8,6% | 8,4% | -1,5% |
| **MS Isdin** | 5,8% | 5,9% | 6,4% | 13,2% |
| **MS La Roche-Posay** | **6,1%** | **6,3%** | **6,4%** | **3,4%** |
| **MS Uriage** | 5,9% | 6,1% | 6,0% | 4,0% |
| **MS Vichy** | 6,0% | 6,2% | 5,6% | -1,3% |
| ***Gap LRP - Avene MS*** | ***-2,69*** | ***-3,18*** | ***-2,82*** | ***-2,00*** |

| **Dermocosmetic Market Parapharmacy** | | | | |
|---|---|---|---|---|
| | **2021** | **YTD 2021** | **YTD 2022** | **Ev(%)** |
| **MS Avene** | 8,3% | 8,8% | 8,9% | 31,6% |
| **MS Bioderma** | 7,2% | 8,3% | 7,6% | 2,1% |
| **MS Isdin** | 5,9% | 6,1% | 6,6% | 24,1% |
| **MS La Roche-Posay** | **9,0%** | **9,3%** | **9,3%** | **40,0%** |
| **MS Uriage** | 6,1% | 7,3% | 6,5% | 18,4% |
| **MS Vichy** | 11,7% | 11,6% | 11,5% | 19,9% |
| ***Gap LRP - Avene MS*** | ***0,69*** | ***0,49*** | ***0,38*** | ***8,44*** |

*Graphic 3: Market Share Evolution from the Dermocosmetic Total Market in Portugal, according to data from IQVIA (data collected from 2020, 2021 and most recent data from 2022)*

## 7. Is La Roche-Posay's climb to the 1st place possible?

From our previous analysis we were able to notice that the gap between La Roche-Posay and Avène has been closing especially with a growing performance in the parapharmacy market.

Looking into more detail between both brands' market share within the main categories, the challenge for La Roche-Posay becomes different:

| | 2021 | | | |
|---|---|---|---|---|
| | **Market Size** | **Avène MS%** | **LRP MS%** | **GAP** |
| **SOLAIRES** | *41,1M €* | 18,5% | 10,2% | -8,3 |
| **SOIN VISAGE** | *70,5M €* | 7,3% | 7,8% | 0,5 |
| **ACNE** | *17,3M €* | 13,0% | 20,2% | 7,2 |
| **SOIN CORPS** | *37,6M €* | 3,6% | 5,8% | 2,2 |
| | **YTD JUL 2021** | | | |
| | **Market Size** | **Avène MS%** | **LRP MS%** | **GAP** |
| **SOLAIRES** | *29,5M €* | 18,5% | 10,1% | -8,4 |
| **SOIN VISAGE** | *39,7M €* | 7,5% | 8,1% | 0,6 |
| **ACNE** | *10,1M €* | 12,4% | 20,0% | 7,6 |
| **SOIN CORPS** | *22M €* | 3,8% | 5,9% | 2,1 |
| | **YTD JUL 2022** | | | |
| | **Market Size** | **Avène MS%** | **LRP MS%** | **GAP** |
| **SOLAIRES** | *37,5M €* | 19,6% | 10,0% | -9,6 |
| **SOIN VISAGE** | *44,4M €* | 7,2% | 9,1% | 1,9 |
| **ACNE** | *10,5M €* | 12,1% | 21,2% | 9,1 |
| **SOIN CORPS** | *23M €* | 3,5% | 5,8% | 2,3 |

*Graphic 4: Market Share Evolution from Avène and LRP in different categories (Dermocosmetic Total Market in Portugal, according to data from IQVIA, data collected from 2020, 2021 and most recent data from 2022)*

Starting by analyzing the Suncare category, comparing full year 2021 and Year to Date July, the gap is positive towards Avène that has almost doubled the market share from La Roche-Posay.

This increased gap could possibly be related towards the intense promotional behavior from Avène during the entire summer season, especially in the Pharmacy channel. Avène´s leadership is more felt in this channel whereas in Parapharmacy channel, La Roche-Posay strategy is more successful.

With the most recent innovation from La Roche-Posay in the Suncare category, the UVMUNE protection, that guarantees the dermocosmetic solution that protects more from the UV radiation among other competitive brands, this gap could possibly have become less evident. This also depends on a good communication strategy from LRP's new hero products and guaranteeing a distribution nation wise.

Regarding the heavy promotional strategy, L'Oréal has a strategy more focused in the long term, avoiding diluting the category and a slow increase of price point, not only to match their competitors but also to match the increasing inflation.

In the Soin Visage category, the increase gap that LRP has from Avène is justified by their investment in the Anti-Age subcategory of this market. As mentioned before, Hyalu B5 Serum has become the SKU number 1 of the brand (in Year-to-Date July 2022 Sell-Out Values) and the increasingly investment and innovation into Anti-Age, with launches like Pure Niacinamide 10 that focus on the consumer needs, has put La Roche-Posay has one of the top brands in this category.

For Acne, La Roche-Posay is currently the number 1 brand of this category in the Parapharmacy channel and has the objective of getting this leadership also in the pharmacy channel, currently occupying the 2$^{nd}$ position. Effaclar, the brand's franchise of Acne, has grown stronger every year with a focus on the specific different types of Acne concerning both Age and severity. The resilient investment towards prescription with dermatologists has also been essential for the brand's growth.

Concerning Bodycare, La Roche-Posay grows the gap between Avène, but the market share has a slight decrease from Year-to-Date July 2021 to Year-to-Date 2022. This category has a slower growth comparing to Soin Visage and Suncare, proving the tendency of the market towards subcategories like Anti-Age.

With all this considering, for the following section of this dissertation further investigation will be analyzed to understand more about the Portuguese consumer, its preferences, and main changes with COVID-19 pandemic. The brand awareness concerning La Roche-Posay among the consumers will be further mentioned. Both an online survey and a focus group exercise will be the main drivers of the market research.

## MARKET RESEARCH

In order to collect data and to have a more relevant approach to the problem statement of this dissertation, it was necessary to focus on primary data and secondary data.

As a first step, the information gathered was regarding the dermocosmetic market through IQVIA, the Sell-Out platform, that L'Oréal uses to evaluate the pharmacy and parapharmacy channel, the evolution of the different categories and segments and the behavior of competitors towards the last consumer behavior changes.

The secondary data for the literary review was collected from academic articles and top journals focused on the keywords selected for the development of this dissertation. Besides this, some other data was collected from L'Oréal Website, L'Oréal Finance Report and social media pages from La Roche-Posay and main competitors.

The start of the primary data was focused on in-depth interviews with La Roche-Posay's team, ranging from Category Trade Manager, Brand Activation Manager, Key Account Manager of Modern Distribution and E-Commerce, Sales Representatives and Medical/ Education Manager of La Roche-Posay. This qualitative data helped gaining a more qualitative understanding about the brand in its key frames for a successful future: the brand's bet on prescription, investment in the point of sale and the rising market of modern distribution and e-commerce.

For quantitative data, an online survey was conducted to understand more in depth, the Portuguese dermocosmetic consumer, COVID-19 impact on consumption patterns and more detail about La Roche-Posay and its consumers. This method was chosen due to the easiness and flexibility of the process of collecting data. Being a faster method with a higher response rate, more than 180 respondents were achieved in less than 3 days, through Qualtrics.

The survey was divided in 3 main parts: the first focused on the purchase behavior of the Portuguese consumer, preferences, and channels of consumptions; the second on the knowledge of the consumer about La Roche-Posay and thirdly social demographic data.

To finish the Market Research in a later stage of the dissertation development and with some of the conclusions and ideas taken from all the previous sources of market data, a focus group was developed. The focus group had an emphasis on the main characteristics of the dermocosmetic market, a more in depth understanding of the changes with pandemic, channel price perception, purchase decision making and promotional actions.

Portuguese Dermocosmetic Consumer and its Preferences

From the responses obtained from the online survey more than 87% is a consumer of dermocosmetic products. The consumption of these products was most frequent monthly and quarterly (35% and 34% respectively). 40% of the consumers plan most of their consumption, while 4% never plan their purchases. From the focus group exercise, the responses collected concerning frequency of purchase followed the similar results.

Concerning the preference when purchasing dermocosmetic products the most important factors selected by the respondents was the preference for their favorite brand as the first factor, promotions & sales as the second factor and the geographic convenience relative towards the residency area as third factor. From the factors asked, the less relevant was the advantages with the “Farmácia” card.

With the further research from the focus group, the participants identified the solution/amenity of their skin condition, favorite brand, social media communication and ingredients as the most deciding factors on their purchase decision. Price was discussed but not seen as an obstacle neither as an appealing factor for consumption. When asked about pharmaceutical advice in the point of sale, participants mentioned it as a vital interaction when in doubt of products from different brands.

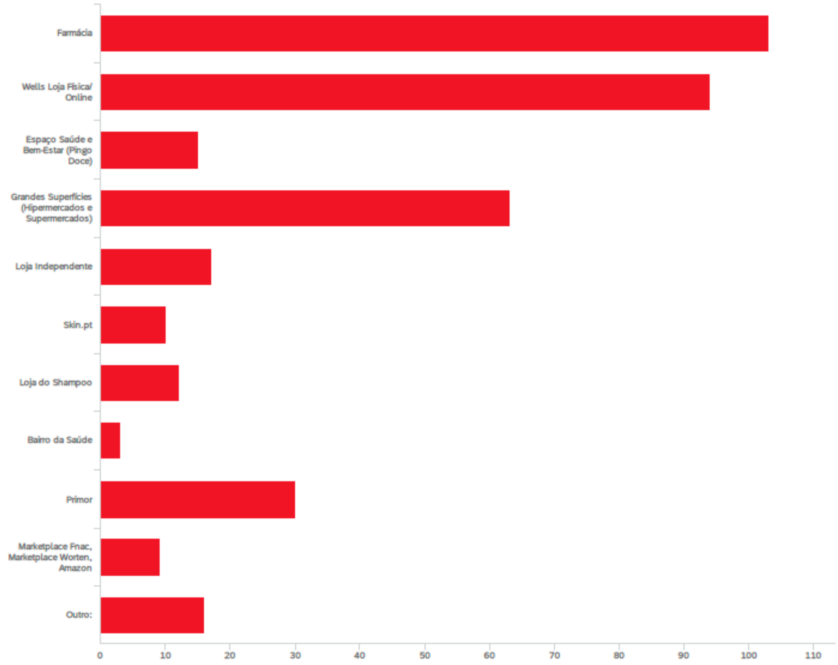
Within the selected channels of purchase for dermocosmetic products, the most common was Pharmacy with more than 28% followed by Wells Store/ Wells Online with more than 25% of respondents.

The duality in the most common channels of purchase is clear from the sample of the survey. More consumers are switching from Pharmacy to Modern Distribution alternatives: Wells and Espaço Saúde e Bem Estar (both represent more than 29% of respondents’ choices of place of purchase).

Concerning the price point practiced by the different channels the perception of the respondents was different. Mass market was clearly seen as the cheapest alternative with more than 28% of respondents putting it in the number 1 position, but the channel with the lowest mean was Wells Physical Store/ Online (3,11). Primor was also seen as one of the cheapest channels (even though this channel has a very limited selection of dermocosmetic products). The most expensive channels from the survey were some e-commerce websites (Bairro da Saúde, Loja do Shampoo, Skin.pt), independent stores and Marketplace Fnac, Worten and Amazon. Pharmacy channel occupied a more average alternative according to the responses.

Q6 - Dos canais de compra de produtos dermoscosméticos, quais os que utiliza?

(escolha os três mais comuns)




| # | Field | Choice | Count |
|---|---|---|---|
| 1 | Farmácia | 27.69% | 103 |
| 2 | Wells Loja Física/ Online | 25.27% | 94 |
| 3 | Espaço Saúde e Bem-Estar (Pingo Doce) | 4.03% | 15 |
| 4 | Grandes Superfícies (Hipermercados e Supermercados) | 16.94% | 63 |
| 5 | Loja Independente | 4.57% | 17 |
| 6 | Skin.pt | 2.69% | 10 |
| 7 | Loja do Shampoo | 3.23% | 12 |
| 8 | Bairro da Saúde | 0.81% | 3 |
| 9 | Primor | 8.06% | 30 |
| 10 | Marketplace Fnac, Marketplace Worten, Amazon | 2.42% | 9 |
| 11 | Outro: | 4.30% | 16 |
| | | | 372 |

*Graphic 5: Answers concerning which of the purchase channels for the dermocosmetic market are more used*

From the focus group, the reality was similar. Notino and Primor, two online channels, were the most mentioned names concerning the cheapest channel, with some mentions to Wells. The pharmacy channel was unanimously perceived as the most expensive.

Regarding the most trust-worthy source of knowledge in the decision of the dermocosmetic brand of preference, survey participants identified dermatologists as the source that plays the most important role, with almost 36% of the responses. Tied in second place, as the trust-worthy sources are family & friends and the pharmaceutical (around 23% for both options).

The reality from our focus group is a little different. Pharma-influencers or blogs from dermatologists were mentioned as priority sources of knowledge in the purchase decision making.

<u>Did the dermocosmetic consumption change with COVID-19?</u>

According to the responses from the survey almost 31% of the sample said that their consumer behavior patterns changed during the pandemic. When asked about the changes the most frequent question was a switch to a more frequent online purchase and a choice of the favorite brand no matter the format, promotion, or discount.

The focus group participants started by mentioning the appearance of new brands in the market which had a bigger focus in specific ingredients and pathologies. Furthermore, they changed their favorite brand during the period of the pandemic because they became more aware about this industry and more informed concerning the usage of specific ingredients. Some mentioned that during the pandemic they had more time to take care of their skin while at home and some mentioned that change their channel of purchase to online solutions to avoid going to the Pharmacy.

<u>Brand Awareness in the Dermocosmetic Market and La Roche-Posay major Characteristics</u>

From the total survey respondents that were consumers of dermocosmetic products, 89% recognized La Roche-Posay and from this percentage, more than 81% had purchased a product from the brand before. The focus group participants all recognized and had previously bought a product from the brand.

Regarding the moment of purchase, 41% of the consumers bought a La Roche-Posay product from medical suggestion or prescription, making it even more evident how essential it is for the brand to continue investing in this area. The Pharmacy was the most common place of purchase, followed by Wells Loja Física/ Online, 46% and 36% respectively.

The most recognizable franchises from the brand were Anthelios (Suncare market) and Effaclar (Acne market), making it even more evident the growth of this 2nd franchise and the rising popularity of this category in the dermocosmetic market.

From the focus group perspective, the answers were similar with Effaclar and Anthelios being the main franchises identified from the brand and Effaclar Duo+ as the star product.

Going back to the moment of purchase, promotion occupies a relevant role in the consumption decision. Only 37% of the consumers of the brand in this survey purchase a product without being in any sort of discount or promotional moment. The other consumers opt for a purchase with discount in the total value, a duo promotion (where either you get the same product for free or cheaper) or a coffret (offer of a product of less value or a gift).

Concerning promotional actions from the focus group perception, discount in the total price was unanimously discussed as the favorite promotional act but coffrets were mentioned as a favorite when the purchase moment was for gifting.

When asked to compare the price point perception about La-Roche Posay and its main competitors, the respondents placed Bioderma as the cheapest alternative more frequently (28% of the 1st place choices). Filorga and Vichy were seen as the most expensive brands from the selection, both registering around 29% of the last place choices.

La Roche-Posay had a mean of 4,06 placing it in the middle of the table of all the top brands of the market when analyzing the price point. From the selected characteristics chosen to describe products from La Roche-Posay, trust was the most important factor with more than 26% of the respondents choosing this option. Efficiency and results was the followed option with emphasis also to the quality of products and its ingredients, as the third chosen option.

<u>Avène VS LRP: The Portuguese Consumer Perspective</u>

To finish the focus group exercise, participants were asked to debate their different perspectives concerning the two brands of the dermocosmetic market. From what was discussed, the highlight goes to the opposite perception that most of the participants had concerning both brands.

Avène was seen as a brand with lack of appeal, poor communication and a cheaper price. Several participants considered the brand as a potential mass market brand without a pharmaceutical look in both their communication and packaging.

La Roche-Posay was highlighted as a more medical and scientific brand, with a pharmaceutical look on their product packaging, better formulation and better ingredients and aimed for young adults/ adults.

Social-Demographic Profile

Concerning survey data, the social demographic profile was the following: The social demographic factors chosen were region, age, genre, occupation, education, income-level, marital status and household members.

Almost 80% of the responses were from the Lisbon area, with more than 57% belonging to the age segment of "until 25 years old". The great majority of the respondents were females (65%), working for someone else or self-employed (75%).

Most of the respondents' education was either a master's degree level or a bachelor's degree level (40% and 34% respectively) with the annual average wage being most common between 10.001€ and 29.999€ (50% of the respondents). Regarding marital status more than 80% are single with an average of 2.85 household members.

The focus group had 7 participants from both genders, with ages from 22 years old to 32 years old and was made in the metropolitan Lisbon Area. The conditions from this focus group ensured anonymity of all participants in the data collected.

Final Conclusions from the Online Survey

From the data collected in this online survey, La Roche-Posay has a clear path to take, to achieve the leadership of the market.

It is necessary to have more brand awareness, more visibility concerning their innovations and different franchises and improving their price perception among consumers. It is also necessary to solve the promotional dependency of the consumers of La Roche-Posay's products and recover the distribution of their best sellers and innovations.

Finally, the brand needs to conquer the new consumer of the after COVID-19. It is now a more knowledgeable consumer, with a highest presence online, more influenced by different peers from social media to dermatologists. Sustainability and more natural products are also topics of focus.

For the next section, we will analyze all the data collected in the previous section and present a possible answer to the research questions of this dissertation.

# DISCUSSIONS AND IMPLICATIONS

**Closing Remarks**

For this section, the main conclusions of this dissertation will be presented, considering the initial proposed research questions.

RQ1: Can La Roche-Posay achieve the goal of leadership in the Portuguese dermocosmetic market?

Based on the results of the market research concerning the dermocosmetic market, we can see that the most recent results of La Roche-Posay indicate a good performance regarding the market share evolution. The brand achieves the second highest position and decreases the gap from Avène. The performance in the parapharmacy channel is also very positive but the same reality doesn't exist in the pharmacy channel, where Avène achieves leadership and a better performance.

Regarding the 4 most important categories of the market, Suncare, Soin Visage, Acne and Body, La Roche-Posay leads in 3 including the highest one – Soin Visage. The only one where Avène leads is Suncare, the second highest of these 4.

Concerning the results of the online survey, La Roche-Posay continues to be one of the most recognizable brands in the Portuguese dermocosmetic market. The investment in prescription is also vital for the brand's objective to reach the leadership of the market.

For the following years, the brand needs to firstly decrease the gap for Avène by successfully distributing their main products and innovations nationally. All the difference purchase channels with the highest demand among consumers need to fulfill the customers' needs from the pharmaceutical channel, Wells and the rising E-Commerce.

RQ2: What are the main consequences from the most recent pandemic and political instability in the dermocosmetic market?

The start of the decade has proven to be a challenge for everyone. From a global pandemic that killed millions of people, the latest conflict between Russia and Ukraine to the general inflation that has caused a lot of people to have less purchasing power and companies having smaller margins due to the increase of their costs with raw materials, ingredients and transportation.

All these factors have brought consequences for every industry but in this dissertation, the focus is on the dermocosmetic industry.

As previously mentioned, the rising cost of materials used for the production and transportation of all products has consequently decreased the margins of the manufacturers and created an almost uniformly rise in prices in this industry. For the brands that have a bigger focus in the pharmacy channel this increase will not be as impactful as it is for other markets. Consumers will continue to look for cheaper alternatives especially from the online channels, something that has already been happening in the latest years.

Heavy promotional strategies will continue to rise in the dermocosmetic market that consequently will make the consumer perception of the real price of the product below the expectation of the manufacturers.

As a consequence from the pandemic, and the new habit of hoarding and stockpiling some products, the bigger formats will continue to increase their value and preference for the consumers, especially in categories like body care.

Besides all these changes, the biggest one will be within the consumer new habits and behaviors that we will be focusing on, in the next research question.

RQ3: Who is the new dermocosmetic consumer from the post COVID-19 pandemic?

The dermocosmetic consumer is now more knowledgeable about the products that is using and increasingly more influenced by a range of factors that most brands cannot control from social media to their group of friends. The adoption of more natural products and more sustainable alternatives in the market has also created the need for brands to emphasize this communication in the point of sale and reformulate many products that used harmful or potentially harmful ingredients for the consumer or that might damage its surroundings.

Besides natural products, also the natural look has been more searched by the consumers as a direct consequence of the less usage of many cosmetic type products mid-COVID-19.

From the analysis of the Sell-Out dermocosmetic market in Portugal, there is a clear tendency and growth of two categories in the last years. Acne and Anti-Age have gained increased value and have been responsible of bringing new types of consumers especially to the pharmacy channel.

From the online survey conducted to support this thesis, there are many findings concerning the Portuguese dermocosmetic consumer.  The availability of their favorite brand, geographical convenience to their residence address and discounts are the most important factors when purchasing dermocosmetic products. The channels of consumption are almost perfectly divided between the pharmacy channel and Wells stores, and with high remark towards the rising success of the e-commerce market. The dermatologist remains as the most influential peer for their purchase decision making.

# LIMITATIONS

During the development of this academic research, it is important to acknowledge the subjective approach the author had in this project, due to his own association with La Roche-Posay. As a researcher it has therefore been important to be aware of the influence in important aspects of this study, due to his prior experiences and approaches to the subject matter. Still, it was made a priority to use the author's bias in an aware matter and relate objectively to the empiricism when possible. The connection to the field of study was taken as a positive factor in the work with analysis and interpretation of the study data.

Concerning the limitations of the present dissertation, the number of responses collected on the online survey are limited. Although the survey achieved the acceptable number of respondents (more than 180 responses), the participants were in their majority from Lisbon, around 80%, which could be seen as an obstacle for having a more national perception of our consumer.

From participants, more than 12% did not consider themselves as dermocosmetic consumers making more than 20 responses not interesting for this thesis' research.

Another limitation is this survey is the distribution. The survey was only shared online and to most connections to the author of the dissertation, excluding non-digital consumers. Some answers in the survey may be biased due to L'Oréal workers, connected directly or indirectly with La Roche-Posay, taking part in the study.

Concerning the limitation of the focus group, the participants were not significantly representative of the full dermocosmetic consumer reality in Portugal and its conclusions need to be taken with this into consideration. The participants also knew about the author's previous relation to the brand, that might have led to a positive bias towards results when comparing La Roche-Posay with Avène.

Besides this, the dissertation was written under the COVID-19 pandemic scenario, meaning that there might be less significant data available to understand both the current and aftereffects of the pandemic in the dermocosmetic market. Some of the conclusions could be seen as assumptions of the "post pandemic" scenario that can be different from the short-term reality. This perspective also happens to the other current global situations we are facing from the Russia-Ukraine conflict to the highest inflation of the past decades.

Finally, regarding the data analysis of the Sell-Out performance of the market, main brands and categories, the information is limited to the database of IQVIA. There will be limitations concerning players, pharmacies and online channels not studied by IQVIA.

## FUTURE RESEARCH

For future research, concerning the survey it is recommended to take a better sample of the dermocosmetic consumer. The sample should represent more the national reality and with different platforms to answer the questions and with a broader population including non-digital consumers. Still on the topic of the survey, it is recommended to avoid bias from participants connected to the brand directly or indirectly.

For the focus group, the future research is similar to the reality of the survey. It is necessary that there is no involvement of people related to any of the dermocosmetic brands being researched and that the participants are more representable of dermocosmetic reality in Portugal from age group, digital awareness and different purchase channel preferences.

Concerning the COVID-19 pandemic, Russia-Ukraine conflict and the high inflation, it is recommended to analyze all these topics with more detail, in order to understand the short-term and long-term effect they caused in the dermocosmetic market.

The data analysis of the Sell-Out performance of the dermocosmetic market should be analyzed on a deeper level considering a more extensive period and with more than one source of database, not only IQVIA but also HMR for example.

## TEACHING NOTES

### La Roche-Posay's Synopsis

This case study regards La Roche-Posay's position in the Portuguese dermocosmetic market, and more specifically its objective to the leadership of this market.

La Roche-Posay has had a positive performance in the dermocosmetic market in the last years, but the latest occurrences worldwide could push the brand's goal to a failure. COVID-19 and the Russia/ Ukraine conflict have been major factors not only for the high inflation that affects the price of raw materials, distribution, and product margins but also major changes in the consumer behavior.

The brand has been successfully closing the gap between its major competitor, Avène, with Acne and Body been the categories where their performance stands out but in the Suncare category Avène's leadership continues unbeaten.

Besides this, Avène's performance in the pharmacy channel continues to outweigh La Roche-Posay due to their distribution performance, investment in this Point of Sale, aggressive promotions, and high innovation while in the parapharmacy channel La Roche-Posay leadership continues increasing.

Taking all of this into account, the challenges of La Roche-Posay for the future focuses on different topics. Firstly, how can the brand face Avène's dominance especially in the Suncare market and how can it revalue this heavily promoted category with the consumer. Besides this, how can the brand adapt to the most recent consumer behavior changes as a consequence of the most recent pandemic of COVID-19.

### Target Audience

This case study could be used in marketing or strategy classes for both undergraduate and master students. It is intended to serve as a teaching tool for class discussion to teach different marketing concepts in a more empirical way.

**Target Objectives**

The proposed case-study is intended to serve as a teaching tool for class discussion. It provides the opportunity to illustrate theoretical concepts in the field of marketing research and strategy that can be applied to actual situations in general more recently in the Portuguese dermocosmetic market. To be more precise, this case presents the following objetives:

A: Approach a real case that deals with a brand's goal of reaching leadership of a very competitive market.

B: Analyze how the dermocosmetic market in Portugal is divided and how La Roche-Posay and the main players of this market behave in the different categories.

C: Analyze how can a brand adapt their products to the changes in the consumer behavior from external factors, like COVID-19

D: Discuss which strategy should be ideal according to the most recent changes in consumer behavior and how to reach the number one position in this market.

**Relevant Theory**

In order to assess their answers, students should take into consideration not only the case study and survey information, but also the following articles:

- Dreno, B., Araviiskaia, E., Berardesca, E., Bieber, T., Hawk, J., Sanchez-Viera, M. and Wolkenstein, P., 2014. The science of dermocosmetics and its role in dermatology. Journal of the European Academy of Dermatology and Venereology, 28(11), pp.1409-1417.
- Bom, S., Jorge, J., Ribeiro, H.M. and Marto, J., 2019. A step forward on sustainability in the cosmetics industry: A review. *Journal of Cleaner Production*, *225*, pp.270-290.
- Brandt, F.S., Cazzaniga, A. and Hann, M., 2011, September. Cosmeceuticals: current trends and market analysis. In *Seminars in cutaneous medicine and surgery* (Vol. 30, No. 3, pp. 141-143). WB Saunders.

**Suggested Assignment Questions**

**1. What are the latest market trends in the dermocosmetic industry?**

Students should look for answers in the literary review that approaches this topic and the extra relevant theory that was proposed.

To start the students should focus on the sustainability section of the literary review, mentioning how the product life cycle, the materials, ingredients, packaging and the after-consumption waste are now focus points for both the brands but also the consumers. The usage of natural ingredients should also be mentioned by the students.

Following this, students should mention the main driver of growth for the dermocosmetic market which is both the advances in medicine but also the wish of consumers to appear younger. The growth of ethnic cosmetics and the regional twist of many brands to meet the consumers' trends, should also be added to the answer.

Finally, the usage of some of the new filters, ingredients, nanotechnology, and laser treatments should be mentioned to complete the answer of the students.

**2. What has been the biggest impact of COVID-19 in the dermocosmetic market?**

Students should look for answers in the literary review that approaches this topic and the extra relevant theory that was proposed.

Firstly, the students should mention the overall changes in the consumer behavior as a whole and then approach specifically regarding the dermocosmetic consumer.

Students should enlist the habits of hoarding, stockpiling, improvisation, and the postponing of consumption of some discretionary products or services. The rising usage of online channels of consumption should also be mentioned.

Concerning the dermocosmetic market, students should focus on the specific behavioral changes regarding the usage of makeup and the usage of a lot of e-commerce dermocosmetic websites.

The students should also conclude the answer by mentioning that the dermocosmetic consumer is now more knowledgeable and practical concerning their consumption decision.

**3. How is L'Oréal segmented in the beauty industry?**

Students should look for answers in the case study section dedicated to the international structure of L'Oréal and search more information on the company's website considering the latest financial public report.

To begin, the students should mention the most recent results of L'Oréal in sales and how that puts them as the number one manufacturer in the world concerning the beauty industry.

After this, the 4 main divisions of the cosmetic market of the manufacturer should be mentioned and students should further their investigation to understand the dimension of each of these divisions and the different brands that compose each of them.

**4. Analyze the dermocosmetic market in Portugal in terms of distribution channels, main categories, and the main players of the market.**

Students should look for answers in the case study section dedicated to the analysis of the Sell-Out performance of this market considering the difference channels, categories and biggest competitors of La Roche-Posay.

To start, students should mention the different channels from the skincare market from mass-market channel, pharmacies, parapharmacies, drugstores, perfumeries and e-commerce channels.

Then, students should specify that the biggest channel of distribution isn't part of the distribution options for dermocosmetic brands and that the market consists mainly by the duality of pharmacy and parapharmacy channels. The main categories should also be listed.

Following this, students should refer the most recent data concerning size and evolution of the dermocosmetic market in Portugal.

To conclude, the main brands and manufacturers should be enlisted, reenforcing the leader brand and the leader manufacturer.

**5. Based on the research taken by the online survey what are the major characteristics of La Roche-Posay and how would you classify its brand awareness?**

Students should look for answers in the methodology section from this thesis from the chapter concerning the Brand Awareness in the Dermocosmetic Market and La Roche-Posay major Characteristics.

Students should start by mentioning the brand recognition and the intention of purchase of the survey, followed by the most common place of purchase and the most recognizable franchises of the brand.

Next, the focus should be on the main questions of the survey concerning the moment of consumption, from the promotional importance, price perception and the main characteristics used to describe products from La Roche-Posay.

To conclude, the students should investigate the final conclusions of the online survey in order to understand more details from the future of La Roche-Posay.

**Additional Areas of Discussion**

There are some additional topics that could be covered:

- The post COVID-19 scenario: since one of the limitations of this case study was the lack of insight concerning the true consequences of the recent pandemic, it would be interesting for students to discuss in groups in a following class, the major consequences that they can identify in the dermocosmetic market concerning post COVID-19.
- With these formed groups, students should also suggest the biggest changes the brand has to make to achieve its goal of reaching the leadership of the dermocosmetic market from product innovation, changes in their distribution strategy and the duality between offline and online channels.

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**Focus Group Structure**

Dermocosmetic Market

1. What are the main changes in the dermocosmetic consumption in the after COVID-19?
2. What is your frequency in purchasing a dermocosmetic product?
3. What do you identify as the cheapest and most expensive dermocosmetic channel?
4. For the pharmaceutical channel, is advice from professional in the POS important in your decision making?
5. What is the most decisive factor on your purchase? Price or brand? Another factor?
6. What are your favorite promotional actions? Coffrets? Buy one get one free type? Discount in final price?
7. What is the main source of knowledge you use to select a product?

La Roche-Posay

8. Do you know the brand La Roche-Posay? What are the most recognizable products you can think of?
9. What is your favorite product from the brand?
10. How do you compare La Roche-Posay with Avène? (Quality, Price, Innovation; Product Range)

## Online Survey Structure

Obrigado por ter aceite o convite para participar num estudo de mercado no âmbito do Master in Applied Management (in Strategic Marketing) da Católica Lisbon Business School sobre o mercado da dermocosmética, as principais alterações de consumo na farmácia com a atual pandemia COVID-19 e a estratégia ideal para tornar a La Roche-Posay a marca nº1 do mercado.

Um produto dermoscosmético é destinado ao cuidado da pele através do uso de ingredientes ativos e soluções para amenizar os sintomas de diferentes condições de pele, tipicamente compradas em farmácias. As marcas mais populares do mercado português são a Avene, Bioderma, Isdin, La Roche-Posay e Uriage. Este questionário começa com perguntas gerais de hábitos de compra no mercado dermocosmético, seguindo de questões sobre os diferentes canais de compra disponíveis.

Por último, definem-se algumas perguntas sobre a identidade da marca La Roche-Posay e a sua estratégia ideal para alcançar a liderança do mercado português da dermocosmética.

O inquérito é totalmente anónimo e de resposta voluntária.

→

É consumidor de produtos dermocosméticos?

- Sim
- Não

Qual a frequência que compra produtos dermocosméticos?

- Semanalmente
- Mensalmente
- 2/ 3 vezes por mês
- Trimestralmente
- 2/3 vezes por ano

Quando compra produtos dermocosméticos, planeia as suas compras?

- Nunca
- Raramente
- Algumas vezes
- A maioria das vezes
- Sempre

Quando compra produtos dermoscosméticos, o que é para si mais importante? Ordene as opções pela sua preferência.

- Conveniência geográfica relativamente à área de residência
- Conveniência geográfica relativamente à área de trabalho
- Preferência da marca de eleição
- Entregas ao domicílio
- Facilidade da compra online e variedade de produtos
- Promoções e Descontos
- Vantagens com Cartão Farmácias
- Aconselhamento Farmacêutico
- Outro:

Dos canais de compra de produtos dermoscosméticos, quais os que utiliza? (escolha os três mais comuns)

- Farmácia
- Wells Loja Física/ Online
- Espaço Saúde e Bem-Estar (Pingo Doce)
- Grandes Superfícies (Hipermercados e Supermercados)
- Loja Independente
- Skin.pt
- Loja do Shampoo
- Bairro da Saúde
- Primor
- Marketplace Fnac, Marketplace Worten, Amazon
- Outro:

Ordene os canais de consumo, pela percepção em relação aos preços praticados. A classificação 1 corresponderá à opção que considera que pratica os preços mais baixos e a classificação 11 à loja que pratica os preços mais altos.

Farmácia

Wells Loja Física/ Online

Espaço Saúde e Bem-Estar (Pingo Doce)

Grandes Superfícies (Hipermercados e Supermercados)

Loja Independente

Skin.pt

Loja do Shampoo

Bairro da Saúde

Primor

Marketplace Fnac, Marketplace Worten, Amazon

Outro:

Qual é a fonte de conhecimento mais fidedigna que usa para a escolha de uma marca dermocosmética? (escolha as 2 mais influentes)

Família e Amigos

Farmacêutico

Dermatologista

Redes Sociais/ Blogs / Notícias Online

Publicidade no PDV

Publicidade TV/ Rádio ou outro canal

Outro:

Com a atual pandemia provocada pelo COVID-19, sente que alterou os seus comportamentos de consumo relativamente a produtos dermocosméticos?

Sim

Não

LA ROCHE POSAY
LABORATOIRE DERMATOLOGIQUE

Atualmente a La Roche-Posay é a marca nº1 dermocosmética no mundo, recomendada por mais de 90 mil dermatologistas, com o desafio atual de se tornar a marca líder no mercado português.

Impulsionada pelos valores de coragem, compromisso e amor, aposta na parceria com dermatologistas e especialistas para projetar soluções inovadoras de cuidados com a pele para a pele mais frágil e úteis para as pessoas.

Esta parte do questionário tem como objetivo recolher informação mais detalhada junto dos conhecedores e consumidores da marca e da estratégia ideal para alcançar a desejada liderança.

Conhece a marca dermocosmética La Roche-Posay?

Sim

Não

Alguma vez já comprou um produto da marca?

Sim

Não

Quando comprou, alguma vez foi pela sugestão/ prescrição médica?

Sim

Não

Qual o local onde onde se lembra de comprar mais frequentemente algum produto da marca? Selecione no máximo 2 opções

- Farmácia
- Wells Loja Física/ Online
- Espaço Saúde e Bem-Estar (Pingo Doce)
- Skin
- Loja do Shampoo
- Primor
- Bairro da Saúde
- Marketplace Fnac, Marketplace Worten, Amazon
- Outro

Quais as diferentes categorias da marca La Roche-Posay que reconhece?

- Anthelios (Solares)
- Lipikar (Corpo)
- Effaclar (Acne)
- Kerium (Cabelo)
- Hyalu B5 (Rosto/ Anti-Age)
- Cicaplast (Pele Fragilizada)
- Outra

Quando compra um produto La Roche-Posay…

- Compro independentemente de estar em promoção
- Compra em promoção (desconto do valor total)
- Compra em duos (oferta de produto igual ou preço mais baixo)
- Compra Coffret (produto de oferta de menor valor ou brinde)

Qual é a sua percepção de preço da marca La Roche-Posay, relativamente às restantes marcas do mercado? Ordene (da mais barata para a mais cara)

a. Avène

b. Bioderma

c. Caudalie

d. Filorga

e. Isdin

f. La Roche-Posay

g. Uriage

h. Vichy

O que o faz escolher um produto La Roche Posay? Escolha até três opções

- Confiança
- Prescrição
- Inovação
- Eficiência/ Resultados
- Qualidade dos produtos e seus ingredientes
- Fidelidade
- Fator Qualidade/ Preço
- Patologia (Eczema, Psoriase, etc)

Região

- Centro
- Norte
- Lisboa
- Alentejo
- Algarve
- R.A. Açores
- R.A: Madeira

Idade

- Até aos 25 anos
- Entre os 25 e 34 anos
- Entre os 35 e 44 anos
- Entre os 45 e 54 anos
- Entre os 55 e 64 anos
- A partir de 65 anos

Género

- Feminino
- Masculino
- Outro/ Prefiro não responder

Qual a sua ocupação?

- Estudante
- Reformado
- Desempregado
- Trabalho por conta de Outrem/ por conta Própria

Habilitação Literária

- 1º Ciclo
- 2º Ciclo
- 3º Ciclo
- Ensino Secundário
- Bacharelato
- Licenciatura
- Mestrado
- Pós-Graduação
- Doutoramento

Rendimento Médio Bruto Anual

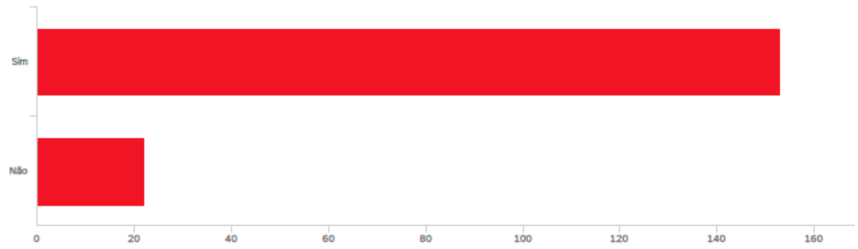
- Até 10.000€
- 10.001€ a 29.999€
- 30.000€ a 49.999€
- 50.000€ a 74.999€
- 75.000€ a 89.999€
- 90.000€ a 100.000€
- Acima de 100.000€

Nº Membros de Agregado Familiar

- 0
- 1
- 2
- 3
- 4
- 5 ou mais

## Online Survey Answers

### Q2 - É consumidor de produtos dermocosméticos?

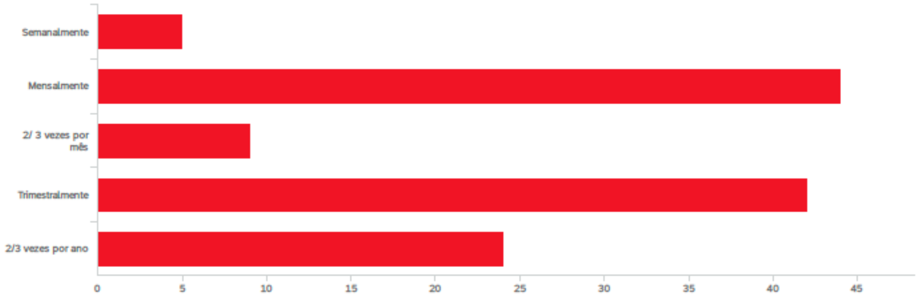



| # | Field | Minimum | Maximum | Mean | Std Deviation | Variance | Count |
|---|---|---|---|---|---|---|---|
| 1 | É consumidor de produtos dermocosméticos? | 1.00 | 2.00 | 1.13 | 0.33 | 0.11 | 175 |

| # | Field | Choice Count | |
|---|---|---|---|
| 1 | Sim | 87.43% | 153 |
| 2 | Não | 12.57% | 22 |
| | | | 175 |

Showing rows 1 - 3 of 3

### Q3 - Qual a frequência que compra produtos dermocosméticos?

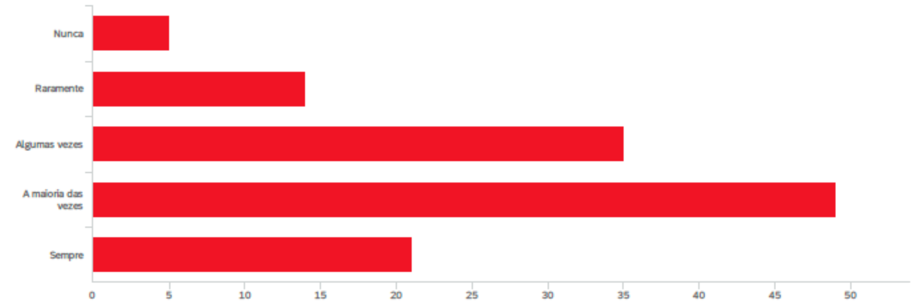



| # | Field | Minimum | Maximum | Mean | Std Deviation | Variance | Count |
|---|---|---|---|---|---|---|---|
| 1 | Qual a frequência que compra produtos dermocosméticos? | 1.00 | 5.00 | 3.29 | 1.24 | 1.54 | 124 |

| # | Field | Choice Count | |
|---|---|---|---|
| 1 | Semanalmente | 4.03% | 5 |
| 2 | Mensalmente | 35.48% | 44 |
| 3 | 2/ 3 vezes por mês | 7.26% | 9 |
| 4 | Trimestralmente | 33.87% | 42 |
| 5 | 2/3 vezes por ano | 19.35% | 24 |
| | | | 124 |

Showing rows 1 - 6 of 6

## Q4 - Quando compra produtos dermocosméticos, planeia as suas compras?




| # | Field | Minimum | Maximum | Mean | Std Deviation | Variance | Count |
|---|---|---|---|---|---|---|---|
| 1 | Quando compra produtos dermocosméticos, planeia as suas compras? | 1.00 | 5.00 | 3.54 | 1.03 | 1.05 | 124 |

| # | Field | Choice Count | |
|---|---|---|---|
| 1 | Nunca | 4.03% | 5 |
| 2 | Raramente | 11.29% | 14 |
| 3 | Algumas vezes | 28.23% | 35 |
| 4 | A maioria das vezes | 39.52% | 49 |
| 5 | Sempre | 16.94% | 21 |
| | | | 124 |

Showing rows 1 - 6 of 6

## Q5 - Quando compra produtos dermoscosméticos, o que é para si mais importante?

Ordene as opções pela sua preferência.

| # | Field | 1 | | 2 | | 3 | | 4 | | 5 | | 6 | | 7 | | 8 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | Conveniência geográfica relativamente à área de residência | 16.13% | 20 | 8.06% | 10 | 16.13% | 20 | 14.52% | 18 | 25.81% | 32 | 7.26% | 9 | 8.87% | 11 | 3.23% |
| 2 | Conveniência geográfica relativamente à área de trabalho | 1.61% | 2 | 4.03% | 5 | 5.65% | 7 | 15.32% | 19 | 14.52% | 18 | 23.39% | 29 | 16.94% | 21 | 17.74% |
| 3 | Preferência da marca de eleição | 46.77% | 58 | 22.58% | 28 | 10.48% | 13 | 8.87% | 11 | 5.65% | 7 | 1.61% | 2 | 2.42% | 3 | 1.61% |
| 4 | Entregas ao domicílio | 2.42% | 3 | 3.23% | 4 | 15.32% | 19 | 12.10% | 15 | 14.52% | 18 | 16.13% | 20 | 23.39% | 29 | 12.90% |
| 5 | Facilidade da compra online e variedade de produtos | 4.84% | 6 | 16.13% | 20 | 12.90% | 16 | 20.16% | 25 | 15.32% | 19 | 15.32% | 19 | 8.87% | 11 | 6.45% |
| 6 | Promoções e Descontos | 12.90% | 16 | 30.65% | 38 | 19.35% | 24 | 14.52% | 18 | 9.68% | 12 | 10.48% | 13 | 1.61% | 2 | 0.00% |
| 7 | Vantagens com Cartão Farmácias | 0.81% | 1 | 2.42% | 3 | 8.06% | 10 | 4.84% | 6 | 3.23% | 4 | 14.52% | 18 | 27.42% | 34 | 36.29% |
| 8 | Aconselhamento Farmacêutico | 13.71% | 17 | 12.10% | 15 | 12.10% | 15 | 9.68% | 12 | 11.29% | 14 | 9.68% | 12 | 10.48% | 13 | 20.16% |
| 9 | Outro: | 0.81% | 1 | 0.81% | 1 | 0.00% | 0 | 0.00% | 0 | 0.00% | 0 | 1.61% | 2 | 0.00% | 0 | 1.61% |

Showing rows 1 - 9 of 9

| # | Field | Minimum | Maximum | Mean | Std Deviation | Variance | Count |
|---|---|---|---|---|---|---|---|
| 1 | Conveniência geográfica relativamente à área de residência | 1.00 | 8.00 | 3.99 | 1.95 | 3.80 | 124 |
| 2 | Conveniência geográfica relativamente à área de trabalho | 1.00 | 9.00 | 5.69 | 1.78 | 3.17 | 124 |
| 3 | Preferência da marca de eleição | 1.00 | 8.00 | 2.27 | 1.68 | 2.81 | 124 |
| 4 | Entregas ao domicílio | 1.00 | 8.00 | 5.40 | 1.87 | 3.51 | 124 |
| 5 | Facilidade da compra online e variedade de produtos | 1.00 | 8.00 | 4.39 | 1.91 | 3.66 | 124 |
| 6 | Promoções e Descontos | 1.00 | 9.00 | 3.20 | 1.68 | 2.81 | 124 |
| 7 | Vantagens com Cartão Farmácias | 1.00 | 9.00 | 6.56 | 1.78 | 3.17 | 124 |
| 8 | Aconselhamento Farmacêutico | 1.00 | 9.00 | 4.69 | 2.50 | 6.23 | 124 |
| 9 | Outro: | 1.00 | 9.00 | 8.81 | 1.02 | 1.04 | 124 |

Q7 - Ordene os canais de consumo, pela percepção em relação aos preços praticados.

A classificação 1 corresponderá à opção que considera que pratica os preços mais baixos e a classificação 11 à loja que pratica os preços mais altos.

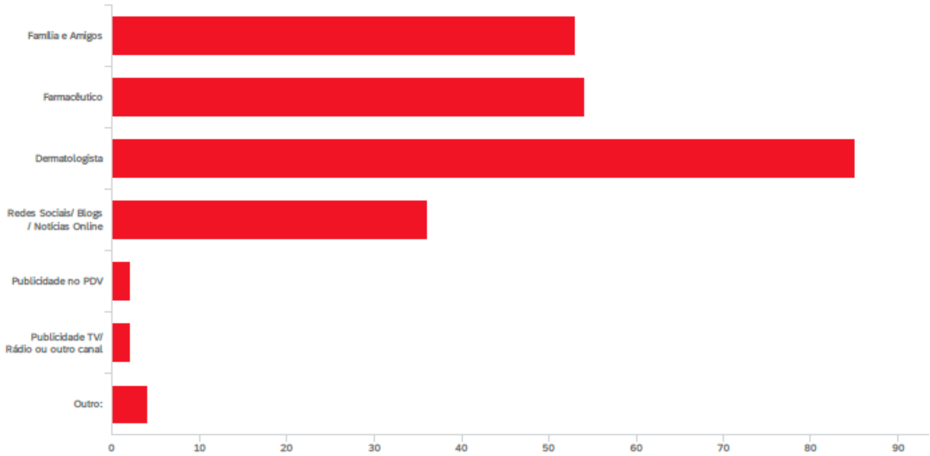
| # | Field | Minimum | Maximum | Mean | Std Deviation | Variance | Count |
|---|---|---|---|---|---|---|---|
| 1 | Farmácia | 1.00 | 11.00 | 5.62 | 3.25 | 10.56 | 118 |
| 2 | Wells Loja Física/ Online | 1.00 | 10.00 | 3.17 | 2.07 | 4.28 | 118 |
| 3 | Espaço Saúde e Bem-Estar (Pingo Doce) | 1.00 | 10.00 | 4.22 | 1.88 | 3.53 | 118 |
| 4 | Grandes Superfícies (Hipermercados e Supermercados) | 1.00 | 10.00 | 3.35 | 2.12 | 4.48 | 118 |
| 5 | Loja Independente | 1.00 | 11.00 | 6.75 | 2.29 | 5.26 | 118 |
| 6 | Skin.pt | 1.00 | 10.00 | 6.08 | 2.08 | 4.31 | 118 |
| 7 | Loja do Shampoo | 1.00 | 11.00 | 6.05 | 2.27 | 5.15 | 118 |

| # | Field | Minimum | Maximum | Mean | Std Deviation | Variance | Count |
|---|---|---|---|---|---|---|---|
| 8 | Bairro da Saúde | 1.00 | 11.00 | 7.31 | 2.05 | 4.22 | 118 |
| 9 | Primor | 1.00 | 10.00 | 5.39 | 3.45 | 11.90 | 118 |
| 10 | Marketplace Fnac, Marketplace Worten, Amazon | 1.00 | 11.00 | 7.64 | 2.86 | 8.16 | 118 |
| 11 | Outro: | 1.00 | 11.00 | 10.42 | 2.22 | 4.94 | 118 |

| # | Field | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
|---|---|---|---|---|---|---|---|---|---|
| 1 | Farmácia | 11.02% 13 | 11.86% 14 | 12.71% 15 | 8.47% 10 | 8.47% 10 | 6.78% 8 | 4.24% 5 | 6.78 |
| 2 | Espaço Saúde e Bem-Estar (Pingo Doce) | 0.85% 1 | 18.64% 22 | 20.34% 24 | 22.03% 26 | 18.64% 22 | 6.78% 8 | 5.93% 7 | 2.54 |
| 3 | Grandes Superfícies (Hipermercados e Supermercados) | 27.97% 33 | 13.56% 16 | 14.41% 17 | 15.25% 18 | 11.86% 14 | 9.32% 11 | 2.54% 3 | 4.24 |
| 4 | Loja Independente | 1.69% 2 | 2.54% 3 | 3.39% 4 | 5.93% 7 | 15.25% 18 | 23.73% 28 | 11.86% 14 | 5.08 |
| 5 | Wells Loja Física/ Online | 18.64% 22 | 27.97% 33 | 20.34% 24 | 15.25% 18 | 6.78% 8 | 3.39% 4 | 1.69% 2 | 1.69 |
| 6 | Loja do Shampoo | 3.39% 4 | 5.08% 6 | 7.63% 9 | 10.17% 12 | 11.86% 14 | 9.32% 11 | 22.88% 27 | 18.64 |
| 7 | Bairro da Saúde | 2.54% 3 | 3.39% 4 | 0.85% 1 | 0.85% 1 | 7.63% 9 | 13.56% 16 | 11.86% 14 | 26.27 |
| 8 | Primor | 22.88% 27 | 9.32% 11 | 6.78% 8 | 8.47% 10 | 2.54% 3 | 3.39% 4 | 6.78% 8 | 6.78 |
| 9 | Marketplace Fnac, Marketplace Worten, Amazon | 4.24% 5 | 2.54% 3 | 4.24% 5 | 8.47% 10 | 5.08% 6 | 5.93% 7 | 9.32% 11 | 9.32 |
| 10 | Outro: | 4.24% 5 | 0.85% 1 | 0.00% 0 | 0.00% 0 | 0.85% 1 | 0.00% 0 | 0.00% 0 | 0.00 |
| 11 | Skin.pt | 2.54% 3 | 4.24% 5 | 9.32% 11 | 5.08% 6 | 11.02% 13 | 17.80% 21 | 22.88% 27 | 18.64 |

Showing rows 1 - 11 of 11

Q8 - Qual é a fonte de conhecimento mais fidedigna que usa para a escolha de uma marca dermocosmética? (escolha as 2 mais influentes)




| # | Field | Choice Count | |
|---|---|---|---|
| 1 | Família e Amigos | 22.46% | 53 |
| 2 | Farmacêutico | 22.88% | 54 |
| 3 | Dermatologista | 36.02% | 85 |
| 4 | Redes Sociais/ Blogs / Notícias Online | 15.25% | 36 |
| 5 | Publicidade no PDV | 0.85% | 2 |
| 6 | Publicidade TV/ Rádio ou outro canal | 0.85% | 2 |
| 7 | Outro: | 1.69% | 4 |
| | | | 236 |

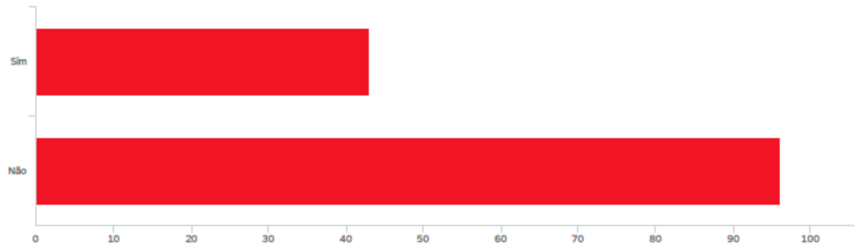
Showing rows 1 - 8 of 8

Q8_7_TEXT - Outro:

| Outro: |
|---|
| A minha opinião sobre os produtos usadod |
| Lista de ingredientes |

| Outro: |
|---|
| Lista de componentes |
| Pesquisa |

Q9 - Com a atual pandemia provocada pelo COVID-19, sente que alterou os seus comportamentos de consumo relativamente a produtos dermocosméticos?

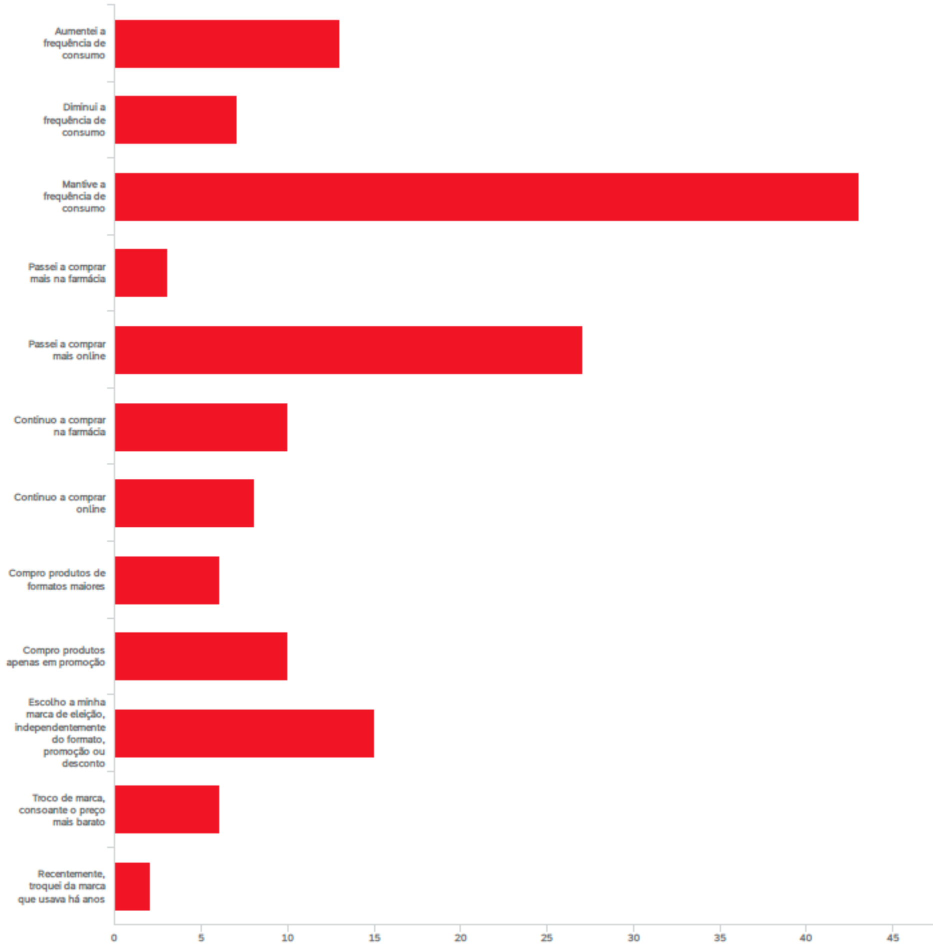



| # | Field | Minimum | Maximum | Mean | Std Deviation | Variance | Count |
|---|---|---|---|---|---|---|---|
| 1 | Com a atual pandemia provocada pelo COVID-19, sente que alterou os seus comportamentos de consumo relativamente a produtos dermocosméticos? | 1.00 | 2.00 | 1.69 | 0.46 | 0.21 | 139 |

| # | Field | Choice Count | |
|---|---|---|---|
| 1 | Sim | 30.94% | 43 |
| 2 | Não | 69.06% | 96 |
| | | | 139 |

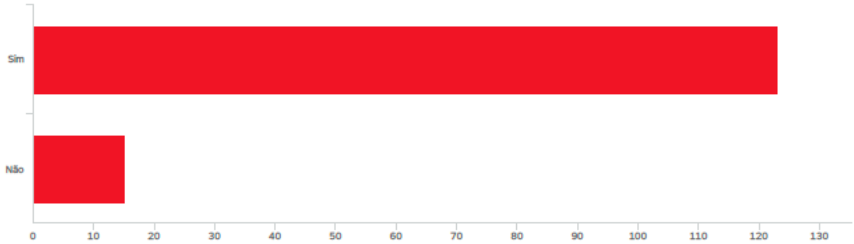
Showing rows 1 - 3 of 3

Q10 - De que maneira mudaram os seus comportamentos de consumo relativamente a produtos dermocosméticos?




| # | Field | Choice Count | |
|---|---|---|---|
| 1 | Aumentei a frequência de consumo | 8.67% | 13 |
| 2 | Diminui a frequência de consumo | 4.67% | 7 |
| 3 | Mantive a frequência de consumo | 28.67% | 43 |
| 4 | Passei a comprar mais na farmácia | 2.00% | 3 |
| 5 | Passei a comprar mais online | 18.00% | 27 |
| 6 | Continuo a comprar na farmácia | 6.67% | 10 |
| 7 | Continuo a comprar online | 5.33% | 8 |
| 8 | Compro produtos de formatos maiores | 4.00% | 6 |
| 9 | Compro produtos apenas em promoção | 6.67% | 10 |
| 10 | Escolho a minha marca de eleição, independentemente do formato, promoção ou desconto | 10.00% | 15 |
| 11 | Troco de marca, consoante o preço mais barato | 4.00% | 6 |
| 12 | Recentemente, troquei da marca que usava há anos | 1.33% | 2 |
| | | | 150 |

## Q12 - Conhece a marca dermocosmética La Roche-Posay?

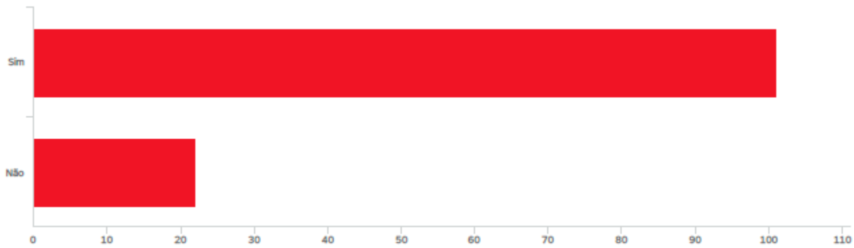



| # | Field | Minimum | Maximum | Mean | Std Deviation | Variance | Count |
|---|---|---|---|---|---|---|---|
| 1 | Conhece a marca dermocosmética La Roche-Posay? | 1.00 | 2.00 | 1.11 | 0.31 | 0.10 | 138 |

| # | Field | Choice Count | |
|---|---|---|---|
| 1 | Sim | 89.13% | 123 |
| 2 | Não | 10.87% | 15 |
| | | | 138 |

Showing rows 1 - 3 of 3

## Q13 - Alguma vez já comprou um produto da marca?

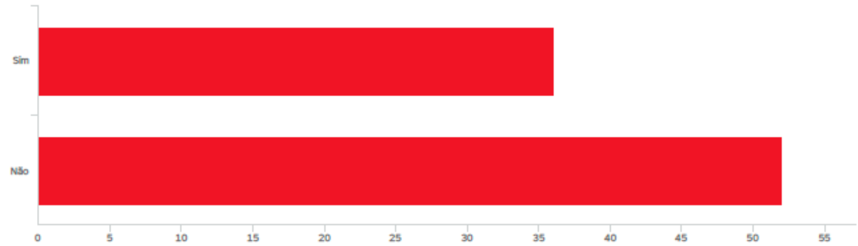



| # | Field | Minimum | Maximum | Mean | Std Deviation | Variance | Count |
|---|---|---|---|---|---|---|---|
| 1 | Alguma vez já comprou um produto da marca? | 1.00 | 2.00 | 1.18 | 0.38 | 0.15 | 123 |

| # | Field | Choice Count | |
|---|---|---|---|
| 1 | Sim | 82.11% | 101 |
| 2 | Não | 17.89% | 22 |
| | | | 123 |

Showing rows 1 - 3 of 3

Q14 - Quando comprou, alguma vez foi pela sugestão/ prescrição médica?

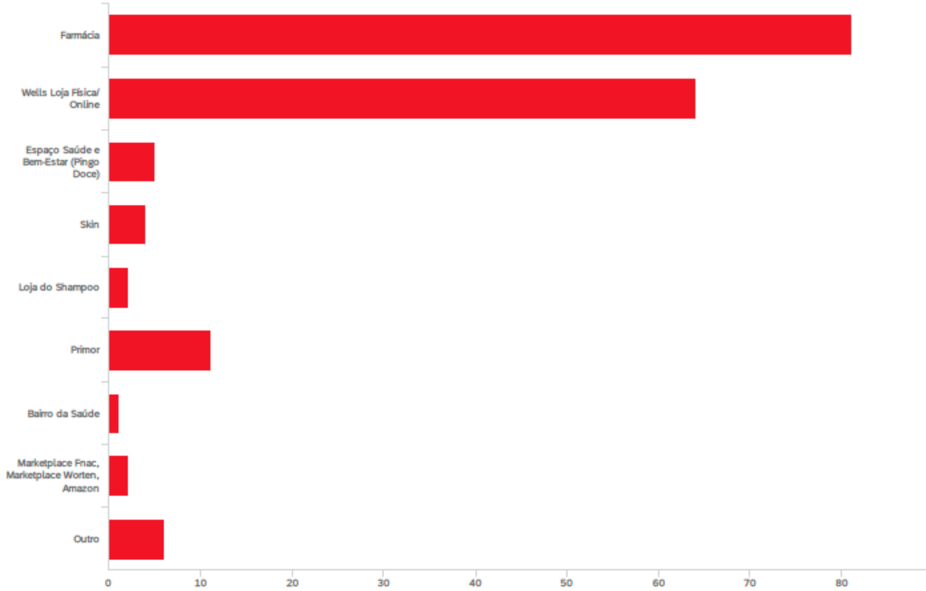



| # | Field | Minimum | Maximum | Mean | Std Deviation | Variance | Count |
|---|---|---|---|---|---|---|---|
| 1 | Quando comprou, alguma vez foi pela sugestão/ prescrição médica? | 1.00 | 2.00 | 1.59 | 0.49 | 0.24 | 88 |

| # | Field | Choice Count | |
|---|---|---|---|
| 1 | Sim | 40.91% | 36 |
| 2 | Não | 59.09% | 52 |
| | | | 88 |

Showing rows 1 - 3 of 3

Q15 - Qual o local onde onde se lembra de comprar mais frequentemente algum produto da marca? Selecione no máximo 2 opções



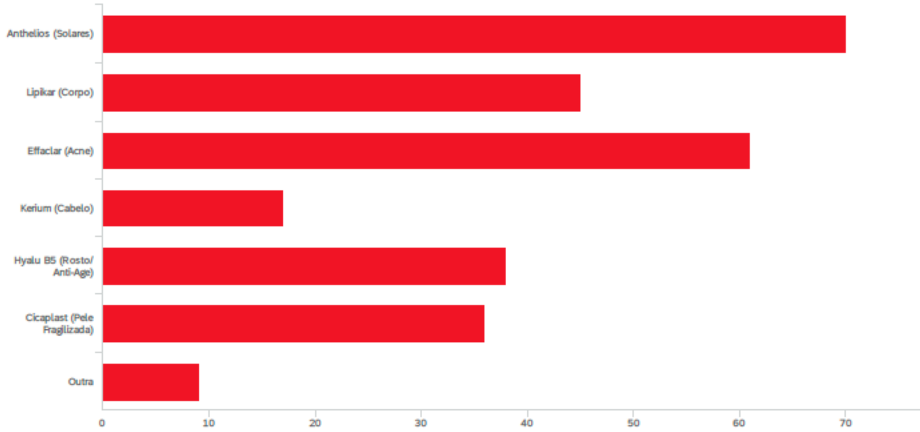

| # | Field | Choice Count | |
|---|---|---|---|
| 1 | Farmácia | 46.02% | 81 |
| 2 | Wells Loja Física/ Online | 36.36% | 64 |
| 3 | Espaço Saúde e Bem-Estar (Pingo Doce) | 2.84% | 5 |
| 4 | Skin | 2.27% | 4 |
| 5 | Loja do Shampoo | 1.14% | 2 |
| 6 | Primor | 6.25% | 11 |
| 7 | Bairro da Saúde | 0.57% | 1 |
| 8 | Marketplace Fnac, Marketplace Worten, Amazon | 1.14% | 2 |
| 9 | Outro | 3.41% | 6 |
| | | | 176 |

Showing rows 1 - 10 of 10

Q15_9_TEXT - Outro

| Outro |
|---|
| Farmácia online |
| Parafarmacias online |
| Mirafarma |
| Look Fantastic |
| Look fantastic.com |

Q16 - Quais as diferentes categorias da marca La Roche-Posay que reconhece?




| # | Field | Choice Count | |
|---|---|---|---|
| 1 | Anthelios (Solares) | 25.36% | 70 |
| 2 | Lipikar (Corpo) | 16.30% | 45 |
| 3 | Effaclar (Acne) | 22.10% | 61 |
| 4 | Kerium (Cabelo) | 6.16% | 17 |
| 5 | Hyalu B5 (Rosto/ Anti-Age) | 13.77% | 38 |
| 6 | Cicaplast (Pele Fragilizada) | 13.04% | 36 |
| 7 | Outra | 3.26% | 9 |
| | | | 276 |

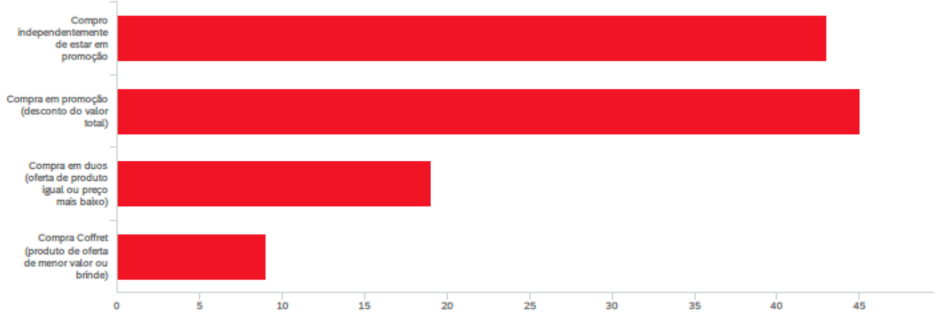
Showing rows 1 - 8 of 8

Q16_7_TEXT - Outra

| Outra |
|---|
| Peles sensíveis |
| Não conheço |
| Nenhuma. So conheco o nome 'LRP'... |

| Outra |
|---|
| redermic |
| Toleriane |

## Q17 - Quando compra um produto La Roche-Posay...




| # | Field | Choice Count | |
|---|---|---|---|
| 1 | Compro independentemente de estar em promoção | 37.07% | 43 |
| 2 | Compra em promoção (desconto do valor total) | 38.79% | 45 |
| 3 | Compra em duos (oferta de produto igual ou preço mais baixo) | 16.38% | 19 |
| 4 | Compra Coffret (produto de oferta de menor valor ou brinde) | 7.76% | 9 |
| | | | 116 |

Showing rows 1 - 5 of 5

## Q18 - Qual é a sua percepção de preço da marca La Roche-Posay, relativamente às restantes marcas do mercado? Ordene (da mais barata para a mais cara)

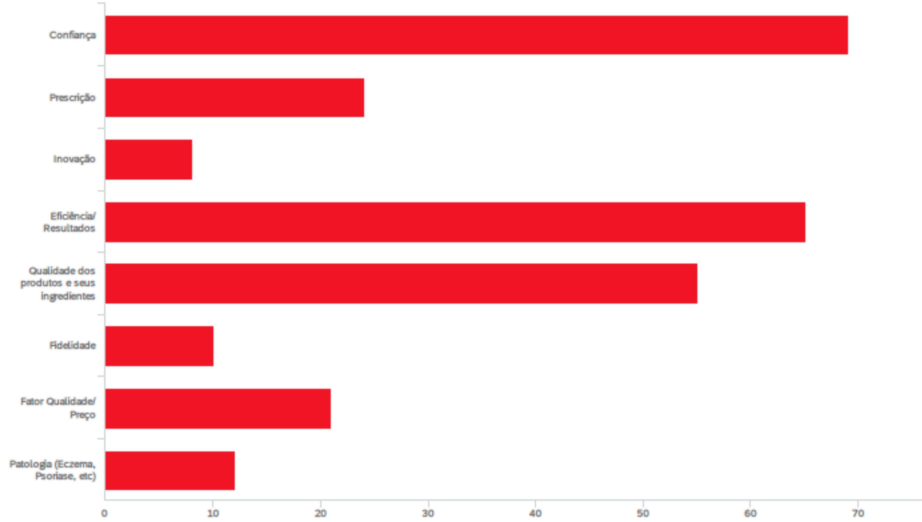
| # | Field | Minimum | Maximum | Mean | Std Deviation | Variance | Count |
|---|---|---|---|---|---|---|---|
| 1 | a. Avène | 1.00 | 8.00 | 3.18 | 1.90 | 3.63 | 88 |
| 2 | b. Bioderma | 1.00 | 8.00 | 3.30 | 2.22 | 4.94 | 88 |
| 3 | c. Caudalie | 1.00 | 8.00 | 4.80 | 2.01 | 4.03 | 88 |
| 4 | d. Filorga | 1.00 | 8.00 | 5.52 | 2.32 | 5.39 | 88 |
| 5 | e. Isdin | 1.00 | 8.00 | 5.13 | 2.15 | 4.61 | 88 |
| 6 | f. La Roche-Posay | 1.00 | 8.00 | 4.08 | 1.85 | 3.41 | 88 |
| 7 | g. Uriage | 1.00 | 8.00 | 4.64 | 2.24 | 5.00 | 88 |
| 8 | h. Vichy | 1.00 | 8.00 | 5.36 | 2.31 | 5.35 | 88 |

| # | Field | 1 | | 2 | | 3 | | 4 | | 5 | | 6 | | 7 | | 8 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | a. Avène | 25.00% | 22 | 15.91% | 14 | 22.73% | 20 | 12.50% | 11 | 9.09% | 8 | 7.95% | 7 | 4.55% | 4 | 2.27% |

| # | Field | 1 | | 2 | | 3 | | 4 | | 5 | | 6 | | 7 | | 8 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2 | b. Bioderma | 28.41% | 25 | 20.45% | 18 | 12.50% | 11 | 9.09% | 8 | 9.09% | 8 | 7.95% | 7 | 6.82% | 6 | 5.68% |
| 3 | c. Caudalie | 4.55% | 4 | 13.64% | 12 | 11.36% | 10 | 13.64% | 12 | 15.91% | 14 | 11.36% | 10 | 25.00% | 22 | 4.55% |
| 4 | d. Filorga | 13.64% | 12 | 0.00% | 0 | 4.55% | 4 | 10.23% | 9 | 13.64% | 12 | 18.18% | 16 | 11.36% | 10 | 28.41% |
| 5 | e. Isdin | 7.95% | 7 | 9.09% | 8 | 7.95% | 7 | 7.95% | 7 | 15.91% | 14 | 21.59% | 19 | 14.77% | 13 | 14.77% |
| 6 | f. La Roche-Posay | 10.23% | 9 | 10.23% | 9 | 20.45% | 18 | 19.32% | 17 | 11.36% | 10 | 20.45% | 18 | 4.55% | 4 | 3.41% |
| 7 | g. Uriage | 3.41% | 3 | 20.45% | 18 | 14.77% | 13 | 17.05% | 15 | 4.55% | 4 | 5.68% | 5 | 22.73% | 20 | 11.36% |
| 8 | h. Vichy | 6.82% | 6 | 10.23% | 9 | 5.68% | 5 | 10.23% | 9 | 20.45% | 18 | 6.82% | 6 | 10.23% | 9 | 29.55% |

Showing rows 1 - 8 of 8

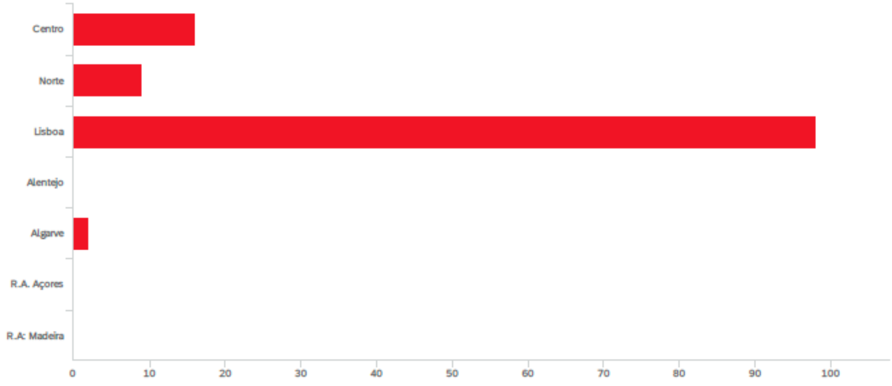
Q19 - O que o faz escolher um produto La Roche Posay? Escolha até três opções




| # | Field | Choice Count | |
|---|---|---|---|
| 1 | Confiança | 26.14% | 69 |
| 2 | Prescrição | 9.09% | 24 |
| 3 | Inovação | 3.03% | 8 |
| 4 | Eficiência/ Resultados | 24.62% | 65 |
| 5 | Qualidade dos produtos e seus ingredientes | 20.83% | 55 |
| 6 | Fidelidade | 3.79% | 10 |
| 7 | Fator Qualidade/ Preço | 7.95% | 21 |
| 8 | Patologia (Eczema, Psoriase, etc) | 4.55% | 12 |
| | | | 264 |

Showing rows 1 - 9 of 9

## Q20 - Região

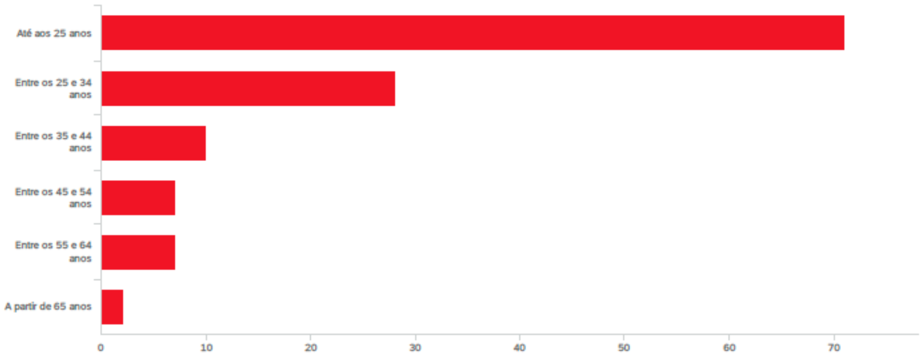



| # | Field | Minimum | Maximum | Mean | Std Deviation | Variance | Count |
|---|---|---|---|---|---|---|---|
| 1 | Região | 1.00 | 5.00 | 2.70 | 0.75 | 0.56 | 125 |

| # | Field | Choice Count | |
|---|---|---|---|
| 1 | Centro | 12.80% | 16 |
| 2 | Norte | 7.20% | 9 |
| 3 | Lisboa | 78.40% | 98 |
| 4 | Alentejo | 0.00% | 0 |
| 5 | Algarve | 1.60% | 2 |
| 6 | R.A. Açores | 0.00% | 0 |
| 7 | R.A: Madeira | 0.00% | 0 |
| | | | 125 |

Showing rows 1 - 8 of 8

## Q21 - Idade

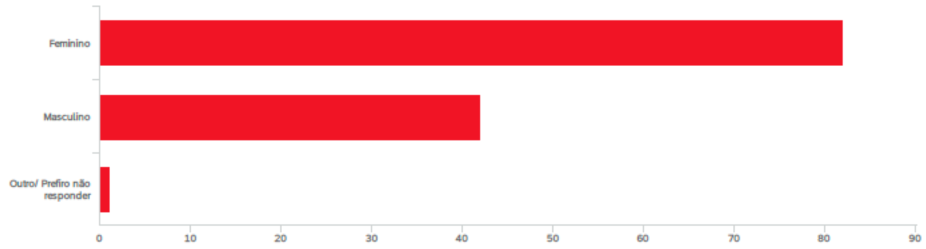



| # | Field | Minimum | Maximum | Mean | Std Deviation | Variance | Count |
|---|---|---|---|---|---|---|---|
| 1 | Idade | 1.00 | 6.00 | 1.86 | 1.27 | 1.61 | 125 |

| # | Field | Choice Count | |
|---|---|---|---|
| 1 | Até aos 25 anos | 56.80% | 71 |
| 2 | Entre os 25 e 34 anos | 22.40% | 28 |
| 3 | Entre os 35 e 44 anos | 8.00% | 10 |
| 4 | Entre os 45 e 54 anos | 5.60% | 7 |
| 5 | Entre os 55 e 64 anos | 5.60% | 7 |
| 6 | A partir de 65 anos | 1.60% | 2 |
| | | | 125 |

Showing rows 1 - 7 of 7

## Q22 - Género

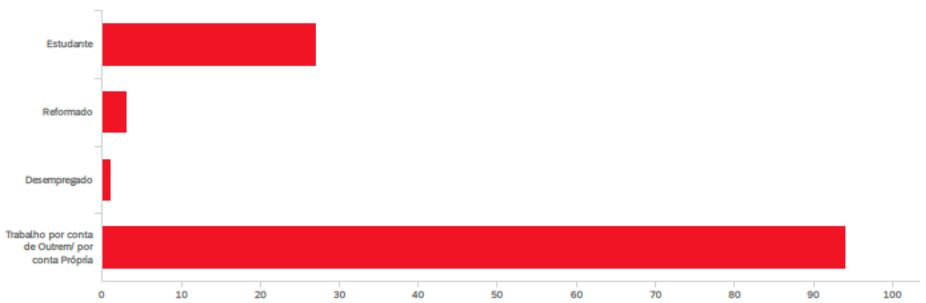



| # | Field | Minimum | Maximum | Mean | Std Deviation | Variance | Count |
|---|---|---|---|---|---|---|---|
| 1 | Género | 1.00 | 3.00 | 1.35 | 0.49 | 0.24 | 125 |

| # | Field | Choice Count | |
|---|---|---|---|
| 1 | Feminino | 65.60% | 82 |
| 2 | Masculino | 33.60% | 42 |
| 3 | Outro/ Prefiro não responder | 0.80% | 1 |
| | | | 125 |

Showing rows 1 - 4 of 4

## Q23 - Qual a sua ocupação?

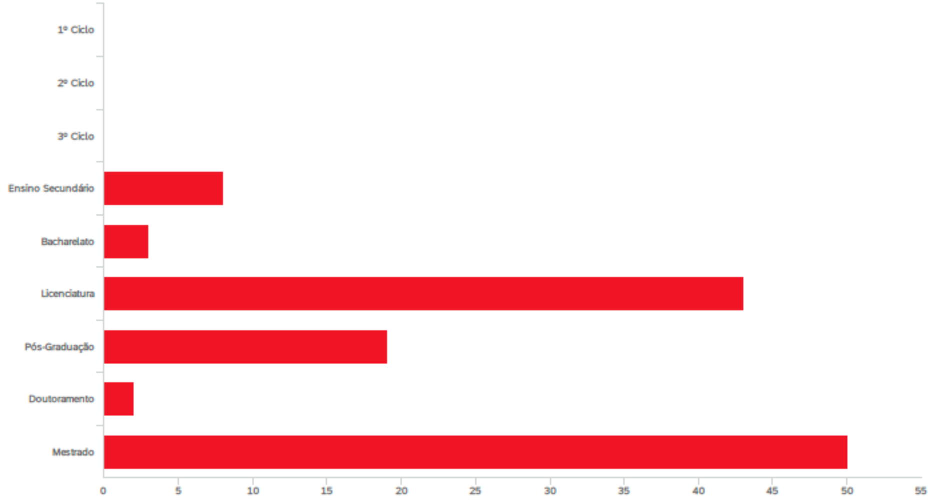



| # | Field | Minimum | Maximum | Mean | Std Deviation | Variance | Count |
|---|---|---|---|---|---|---|---|
| 1 | Qual a sua ocupação? | 1.00 | 4.00 | 3.30 | 1.25 | 1.55 | 125 |

| # | Field | Choice Count | |
|---|---|---|---|
| 1 | Estudante | 21.60% | 27 |
| 2 | Reformado | 2.40% | 3 |
| 3 | Desempregado | 0.80% | 1 |
| 4 | Trabalho por conta de Outrem/ por conta Própria | 75.20% | 94 |
| | | | 125 |

Showing rows 1 - 5 of 5

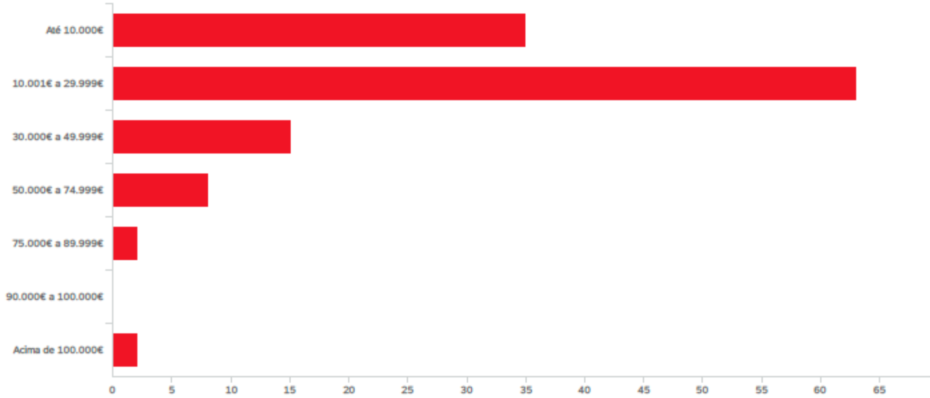
## Q24 - Habilitação Literária




| # | Field | Minimum | Maximum | Mean | Std Deviation | Variance | Count |
|---|---|---|---|---|---|---|---|
| 1 | Habilitação Literária | 4.00 | 9.00 | 7.23 | 1.61 | 2.58 | 125 |

| # | Field | Choice Count | |
|---|---|---|---|
| 1 | 1º Ciclo | 0.00% | 0 |
| 2 | 2º Ciclo | 0.00% | 0 |
| 3 | 3º Ciclo | 0.00% | 0 |
| 4 | Ensino Secundário | 6.40% | 8 |
| 5 | Bacharelato | 2.40% | 3 |
| 6 | Licenciatura | 34.40% | 43 |
| 7 | Pós-Graduação | 15.20% | 19 |
| 8 | Doutoramento | 1.60% | 2 |
| 9 | Mestrado | 40.00% | 50 |

## Q25 - Rendimento Médio Bruto Anual

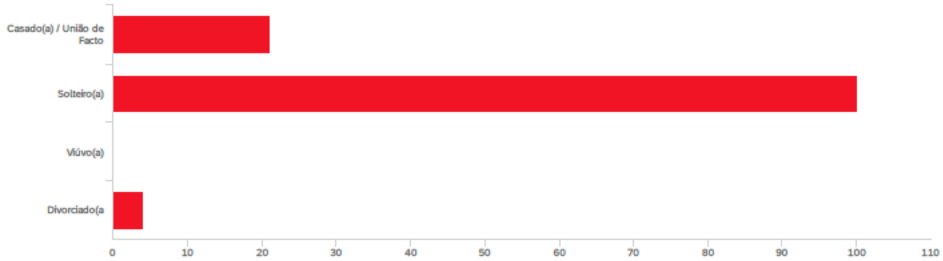



| # | Field | Minimum | Maximum | Mean | Std Deviation | Variance | Count |
|---|---|---|---|---|---|---|---|
| 1 | Rendimento Médio Bruto Anual | 1.00 | 7.00 | 2.10 | 1.09 | 1.19 | 125 |

| # | Field | Choice Count | |
|---|---|---|---|
| 1 | Até 10.000€ | 28.00% | 35 |
| 2 | 10.001€ a 29.999€ | 50.40% | 63 |
| 3 | 30.000€ a 49.999€ | 12.00% | 15 |
| 4 | 50.000€ a 74.999€ | 6.40% | 8 |
| 5 | 75.000€ a 89.999€ | 1.60% | 2 |
| 6 | 90.000€ a 100.000€ | 0.00% | 0 |
| 7 | Acima de 100.000€ | 1.60% | 2 |
| | | | 125 |

Showing rows 1 - 8 of 8

## Q26 - Estado Civil

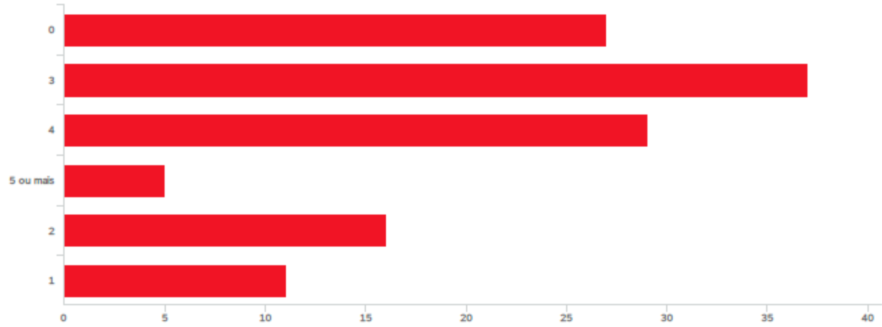



| # | Field | Minimum | Maximum | Mean | Std Deviation | Variance | Count |
|---|---|---|---|---|---|---|---|
| 1 | Estado Civil | 1.00 | 4.00 | 1.90 | 0.53 | 0.29 | 125 |

| # | Field | Choice Count | |
|---|---|---|---|
| 1 | Casado(a) / União de Facto | 16.80% | 21 |
| 2 | Solteiro(a) | 80.00% | 100 |
| 3 | Viúvo(a) | 0.00% | 0 |
| 4 | Divorciado(a | 3.20% | 4 |
| | | | 125 |

Showing rows 1 - 5 of 5

## Q27 - Nº Membros de Agregado Familiar




| # | Field | Minimum | Maximum | Mean | Std Deviation | Variance | Count |
|---|---|---|---|---|---|---|---|
| 1 | Nº Membros de Agregado Familiar | 1.00 | 6.00 | 2.83 | 1.57 | 2.48 | 125 |

| # | Field | Choice Count | |
|---|---|---|---|
| 1 | 0 | 21.60% | 27 |
| 2 | 3 | 29.60% | 37 |
| 3 | 4 | 23.20% | 29 |
| 4 | 5 ou mais | 4.00% | 5 |
| 5 | 2 | 12.80% | 16 |
| 6 | 1 | 8.80% | 11 |
| | | | 125 |

Showing rows 1 - 7 of 7

**End of Report**