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Beauty During a Pandemic: The Impact of COVID-19 on the Cosmetic Industry

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Abstract – The cosmetic industry is a multi-billion-dollar industry that has taken a financial hit in 2020 due to COVID-19. The drop in cosmetic usage leaves the industry in question for future consumer intention and behavior. Survey responses from 1,715 female students at a southeastern U.S. public university was obtained using Qualtrics. Results indicate significant differences in cosmetic usage; however, post-COVID predicted usage indicates that cosmetic usage will revert back to pre-COVID levels for eye, lip, and skin cosmetics. For face cosmetics, usage will still be slightly below pre-COVID levels. The most important cosmetic category was skincare, which had the highest levels of usage pre-, mid-, and post-COVID. Price maintained a high priority in pre-, mid-, and post responses. Convenience was not as essential pre-COVID but became extremely important mid-COVID and is shown to continue a high level of importance for post intentions. Managerial implications of these results are discussed.

Keywords – Cosmetic industry, COVID-19, Usage, Marketing, Recommendations

Relevance to Marketing Educators, Researchers, and/or Practitioners – Despite that the U.S. Cosmetic Industry expected a significant decline in 2020, usage is predicted to return to pre-COVID results for post intentions. The skincare category had little decline mid-COVID and is expected to increase post-COVID. Implementing skincare products as a new product line is highly recommended due to its sustainability through an industry-changing pandemic. Based on the research of a smaller and specific sample, performing research on a larger region and demographic is worthwhile to further grasp understanding of how COVID-19 impacted attitudes and behaviors of cosmetic users. Thus, further predicting setbacks and recovery opportunities for marketers.

Introduction

COVID-19 has completely changed and disrupted many jobs, markets, and industries. In particular, the cosmetic industry has been hit hard since consumers are now staying home more frequently and also wearing masks in public. Many consistent cosmetic consumers may not see the value in using, let alone buying, cosmetics when their job or school may only require virtual meetings. Additionally, mask requirements may affect any type of lip and, partially, face cosmetic usage (Altman, 2020). So how exactly has COVID-19 impacted the cosmetic industry's markets, jobs, and overall direction? Consumers may or may not notice a significant change since the cosmetic industry was at its height in 2018 (Statista, 2020). However, due to the pandemic, the cosmetic industry both in the United States as well as globally has declined in revenue and experienced noteworthy losses (Fernandez, 2020; "COVID-19: Beauty's playbook," 2020; Hiner, 2020).

Due to these significant changes, it is imperative that past success is compared to the industry's current state. Understanding the past and present will give insight into forecasting the future. For example, understanding the industry's past and present status will illustrate both revenue and job losses that have occurred. Additionally, as referenced in the methodology section, a survey has been created specifically for this study which may show changes in attitudes and perceptions towards using cosmetics pre- and mid-pandemic. This survey may also give insight into how marketers can potentially convince consumers to resume cosmetic purchasing. Next, changes in revenue, traffic, and behavior regarding online shopping and store pick-up will be reviewed. Finally, this research, along with previous marketing research, will be important to investigate in order to develop recommendations for what strategic plans the cosmetic industry should consider to be successful in the future and recover from current losses. This research can then be used if future potential national or global disasters may occur and can help the industry and specific markets with marketing strategies to overcome.

This study aims to understand and explain changes in consumer behavior as it relates to the cosmetic industry. Understanding this information is critical as it directly impacts the cosmetic industry's success as it relates to revenue, job numbers, and products desired. Having a clear understanding of these changes can help the industry recover from losses and develop new marketing strategies to thrive again. Specifically, the two research questions are: 1. How have consumers' cosmetic attitudes, behaviors, and preferences changed due to COVID-19? 2. What marketing strategies can businesses adopt and aid industry recovery post-pandemic?

Literature Review

The Cosmetic Industry Pre-COVID

The United States Beauty and Cosmetics industry is among the related beauty industries that manufacture, package, and distribute cosmetics like face, eye, and lip makeup (Hiner, 2020). The cosmetic industry thrived before the pandemic hit and expected growth in the new decade (Senn-Kalb, 2020). In fact, in 2019, the global makeup market grew by 4.9%, reaching \$55,692.5 million in sales (MarketLine, 2020). Growth was expected to continue due to dynamic changes the industry made with influencer marketing and celebrities creating their own makeup lines. The worldwide cosmetics segment was expected to grow by four billion in revenue by 2020, which is considered steady growth (Senn-Kalb, 2020). Additionally, out of the top 50 beauty retailers, Ulta and Sephora control 49% of the industry (Walters, 2020). Furthermore, these beauty retailers could help customers with testing or applying makeup. Having this help made buying makeup an experience and promised the customer that they were leaving the store with the exact shade they needed (Walters, 2020). When examining the cosmetic brands most commonly purchased in the United States, the top four include CoverGirl at 41%, Maybelline New York at 37%, Revlon at 28%, and L'Oréal Paris at 24% (Statista, 2020). This research highlights how the cosmetic industry experienced a positive growth rate prior to the start of the pandemic.

The Cosmetic Industry Mid-COVID

However, by March 2020, the industry took a drastic shift because of COVID-19. Because of the pandemic's impact, the overall United States industry's revenue has decreased by 7.4% and

employment by 3.91% in 2020 (Hiner, 2020). A great part of this decrease is because beauty, cosmetics, and fragrance stores such as Ulta and Sephora were closed for two months due to COVID-19, resulting in its revenue decrease of 5.3% (Fernandez, 2020). In addition, these stores also were forced to furlough tens of thousands of employees (Creswell, 2020). Due to the influence of cosmetic retail giants Ulta and Sephora, their closing significantly impacted the industry (Walters, 2020). Now, the idea of someone else touching your face may sound unsettling and may potentially violate local mask ordinances (Walters, 2020).

Currently, many companies are trying to predict when recovery will come and when the overall industry will be stabilized. It is predicted that the market will decline by -10.7% in 2020 and not return to pre-outbreak levels until 2023 (MarketLine, 2020). This prediction matches other research showing that the worldwide cosmetic segment will not recover until 2023 (Senn-Kalb, 2020). These reports show there is hope for eventual recovery in the global makeup market, but without question the pandemic has deeply undercut growth. Further, evidence of a downward trend due to increased unemployment and reduced disposable income is provided by the Consumer Confidence Index. When the Consumer Confidence Index is high, consumers are more likely to purchase cosmetics (Hiner, 2020). An IBIS World report states the Consumer Confidence Index was at -1.60% in 2019 and is now -13.50% for U.S. manufactured cosmetics (Hiner, 2020). Not only are the industry and market down overall, but another critical aspect to note is what specific products are down in sales. Research has shown that for the week ending March 14, 2020, as compared to the prior year, lip cosmetics were down 23%, cosmetic applicators were down 30%, and cosmetic gift sets were down 19% (“COVID-19: Beauty's playbook,” 2020).

Changes in Consumer Behavior, Attitude, and Perceptions

As previously mentioned, many women are starting to stray away from their regular beauty routines due to mask regulations and working remotely (Altman, 2020). If consumers are just staying home all day, it may seem irrelevant to wear makeup. Some researchers have highlighted that worrying about cosmetic usage is selfish, even though it is actually healthy and normal for women to care about their appearance (Chernikoff, 2020; Edwards, 2020). Many women are switching to a bare-faced look and focusing on skincare routines instead (Chernikoff, 2020; Creswell, 2020). In contrast, other women are still wearing lipstick and mascara because it makes them feel like themselves and in control (Chernikoff, 2020; Edwards, 2020). In fact, Dr. Stewart Shankman, chief of psychology at Northwestern Memorial Hospital, states that maintaining routines that boost confidence can benefit consumers' mental health (Chernikoff, 2020). Moreover, some individuals hope that the pandemic will decrease levels of personal body shaming (Altman, 2020). Overall, women are becoming more accepting of not wearing makeup daily and going for a more natural look, which could have long-term ramifications on the cosmetic industry (Edwards, 2020). Due to the current trend towards more natural beauty, it is important to understand consumer attitudes, perceptions, and behaviors in order to better understand the changes that might impact the industry for years to come.

Impacts of Online Shopping and Store Pick-up

Since many brick and mortar beauty retailers closed, with many still at minimal capacity, consumers are now shopping online and using store pick-up at a higher rate than pre-COVID (“COVID-19: Beauty's playbook,” 2020). The biggest concern of brick & mortar beauty retailers

is that online cosmetic retailers may decrease demand for their stores, which could lead to more jobs lost and businesses closed (Fernandez, 2020). NPD, an American market research company, reported that the week of March 28, 2020, online cosmetic sales increased 47%, which accounts for 90% of industry spending (“COVID-19: Beauty's playbook,” 2020). Typically, the average e-commerce share of cosmetic purchases is only 20% (“COVID-19: Beauty's playbook,” 2020), illustrating an intense shift in buying habits amongst consumers. This shift means retailers like Ulta, Sephora, and other beauty retailers have to adapt to include updated online shopping, no-contact delivery, and pick-up in-store models (“COVID-19: Beauty's playbook,” 2020).

Methodology

The methodology utilized in this research is a quantitative research project based on a survey. This survey was created using Qualtrics and sent to 9,665 female students enrolled in Fall 2020 classes at a southeastern U.S. public university. These strategies allowed an appropriate number of responses to investigate pre, current, and future cosmetic attitudes and preferences. Female students are the main focus of this study since females typically are the ones that wear face cosmetics most often. In fact, Science of People stated that an estimated 44% of women do not like to leave their home without makeup (Edwards, 2020). The data was gathered through Qualtrics. Out of the original 9,665 students emailed, 2,317 started the survey. After removing incomplete surveys, surveys from respondents who do not wear makeup, and surveys from respondents who failed the attention check, there were 1,715 completed responses used for data analysis. It took respondents, on average, 12.5 minutes to complete the survey.

Measures

All of the attitude-based scales were unidimensional and taken from the extant literature. Resilience ($\alpha = 0.875$) was a 6-item scale from Smith et al. (2008), emotional engagement ($\alpha = 0.953$) was a 5-item scale from Rich et al. (2010), positivity ($\alpha = 0.881$) was a 7-item reduced scale taken from Caprara et al. (2012), and intrinsic motivation ($\alpha = 0.797$) was a 4-item reduced scale taken from Oliver and Anderson (1994). Emotional exhaustion ($\alpha = 0.917$) was a 7-item reduced scale taken from Maslach and Jackson (1981) while fashion consciousness ($\alpha = 0.791$) was a 3-item reduced measure taken from Nam et al. (2007) and attitudes toward brand names ($\alpha = 0.707$) was a modified 4-item scale taken from Lafferty and Edmondson (2014). Finally, three items were used to measure attitudes toward wearing cosmetics ($\alpha = 0.717$). All items were measured using a seven-point Likert scale.

Results

Respondent Demographics

First, everyone within the 1,715 responses was female. For age, 85.6% (N = 1,468) of participants were between ages 18 and 24, and 8.7% (N = 149) of participants were between ages 25 and 34. A majority of participants were white 70.8% (N = 1,214) or African American 15.3% (N = 262). School classification results show that 21.3% (N = 365) of participants were freshman, 19.5% (N = 334) were sophomores, 26.9% (N = 461) were juniors, 31.5% (N = 540) were seniors, and 7%

(N = 120) were graduate students. Participants were also asked to provide the types of classes they were currently completing with 77.8% (N = 1,334) in remote classes (e.g., Zoom), 65.1% (N = 1,116.5) in asynchronous online classes, 54.3% (N = 931) in typical in-person classes, and 36.3% (N = 623) in hybrid classes (mix of online and in-person). Next, 45.4% (N = 779) stated they work a part-time job and 18.5% (N = 317) work full-time. Then, participants stated their work environment with 52.3% (N = 897) working in-person and 9.7% (N = 166) working in a mix of remote, online and/or in-person. 32.5% (N = 604) of participants were not currently working. As for outside activities, 97.4% (N = 1,670) said they were not a student athlete, and most stated they do not currently volunteer at 74.2% (N = 1,272). In addition, a majority 61.8% (N = 1,060) were single and never married while 28.4% (N = 487) were single but in a committed relationship and 7.9% (N = 135) were married. Lastly, 40.0% (N = 686) of students made below \$10,000 a year while an additional 20.1% (N = 345) made between \$10,000-\$24,999 a year.

Buying Behaviors Pre-COVID, Mid-COVID, and Post-COVID Intentions

When examining the frequency with which participants used the different types of cosmetic products (face cosmetics, eye cosmetics, lip cosmetics, and skincare) based on pre-COVID, mid-COVID, and post-COVID intentions, it is clear that usage changed (see Table 1). Overall, skincare products were the most frequently worn cosmetic type, followed by lip cosmetics, then eye cosmetics, and finally face cosmetics. When looking at the results, pre-COVID usage was higher than mid-COVID for each cosmetic product type, although the drop was more significant in both face, eye, and lip care. However, results also show that post-COVID intention usage shows that participants will be similar to pre-COVID levels for the different cosmetic product types.

Table 1: Percentage and Mean Frequency Scores for Each Factor Pre, Mid, and Post-COVID

Frequency	Pre-Covid	Mid-Covid	Post-Covid Intentions
Face Cosmetics			
Never	225 (13.1%)	367 (21.4%)	223 (13%)
Only on special occasions	532 (31%)	616 (35.9%)	515 (30%)
Less than once a week	146 (8.5%)	196 (11.4%)	137 (8%)
1-2 times a week	220 (12.8%)	226 (13.2%)	264 (15.4%)
3-4 times a week	250 (14.6%)	159 (9.3%)	304 (17.7%)
5-6 times a week	175 (10.2%)	81 (4.7%)	154 (9%)
Daily	170 (9.9%)	70 (4.1%)	117 (6.8%)
Mean (<i>St. Dev.</i>)	3.55	2.84	3.49

Table 1: Percentage and Mean Frequency Scores for Each Factor Pre, Mid, and Post-COVID

Frequency	Pre-Covid	Mid-Covid	Post-Covid Intentions
Eye Cosmetics			
Never	123 (7.2%)	214 (12.5%)	122 (7.1%)
Only on special occasions	412 (24%)	489 (28.5%)	389 (22.7%)
Less than once a week	156 (9.1%)	197 (11.5%)	137 (8.0%)
1-2 times a week	214 (12.5%)	271 (15.8%)	254 (14.8%)
3-4 times a week	280 (16.3%)	237 (13.8%)	340 (19.8%)
5-6 times a week	238 (13.9%)	134 (7.8%)	225 (13.1%)
Daily	293 (17.1%)	173 (10.1%)	250 (14.6%)
Mean (<i>St. Dev.</i>)	4.17	3.54	4.15
Lip Cosmetics			
Never	106 (6.2%)	242 (14.1%)	113 (6.6%)
Only on special occasions	310 (18.1%)	334 (19.5%)	292 (17%)
Less than once a week	139 (8.1%)	161 (9.4%)	130 (7.6%)
1-2 times a week	184 (10.7%)	192 (11.2%)	187 (10.9%)
3-4 times a week	206 (12%)	142 (8.3%)	220 (12.8%)
5-6 times a week	153 (8.9%)	118 (6.9%)	178 (10.4%)
Daily	617 (36%)	525 (30.6%)	597 (34.8%)
Mean	4.75	4.23	4.77
Skin Care			
Never	46 (2.7%)	58 (3.4%)	45 (2.6%)
Only on special occasions	34 (2%)	62 (3.6%)	65 (3.8%)
Less than once a week	86 (5%)	74 (4.3%)	57 (3.3%)
1-2 times a week	125 (7.3%)	120 (7%)	105 (6.1%)
3-4 times a week	178 (10.4%)	187 (10.9%)	163 (9.5%)
5-6 times a week	153 (8.9%)	158 (9.2%)	165 (9.6%)
Daily	1,094 (63.8%)	1,056 (61.6%)	1,116 (65.1%)
Mean	6.03	5.93	6.06

In order to investigate if the usage frequency between pre, mid, and post-COVID is statistically significant, a comparison of means was completed for each of the cosmetic types (see Table 2). Results show that there is a significant difference between pre-COVID and mid-COVID for all cosmetic types. Participants stated that they wore less of each cosmetic type mid-COVID

than before COVID began. There were also statistically significant differences for each cosmetic type for mid-COVID and post-COVID intentions. In other words, participants plan on wearing each cosmetic type more frequently after COVID-19. When comparing pre-COVID and post-COVID intentions, there were no significant differences in usage frequency for eye, lip, or skincare types. However, there were significant differences in usage frequency for face cosmetics, with post-COVID intentions being slightly less than pre-COVID usage.

Table 2: Comparison in Means for Frequency of Usage between Pre, Mid, and Post-COVID

Type	Pre – Mid			Mid – Post			Pre – Post		
	Mean Difference	<i>t</i>	p-value	Mean Difference	<i>t</i>	p-value	Mean Difference	<i>t</i>	p-value
Face	.711	22.894	.000	-.655	-23.862	.000	.057	2.055	0.04
Eye	.628	20.499	.000	-.610	-22.448	.000	.018	.664	.507
Lip	.518	14.746	.000	-.535	-17.354	.000	-.017	-.594	.553
Skin	.100	4.117	.000	-.131	-5.260	.000	-.031	-1.178	.239

When examining the factors that participants thought were important when choosing cosmetics, five factors were considered. These factors include convenience, brand name, price, color options, and trends. Table 3 shows mean importance scores for each factor pre, mid, and post-COVID. In each case (pre, mid, post), the most important factor was price, and the least important factor was trends. However, the second and third most important factors, based on the mean, depended on if it was pre, mid, or post. Pre-COVID, the second and third factors were color options and then convenience; as for mid-COVID and post-COVID intentions, the second and third were reversed (convenience then color options). When examining if there were statistical differences based on pre, mid, and post-COVID, a comparison between means was conducted (see Table 4). When comparing pre-COVID and mid-COVID importance factors, there were significant differences for each factor except for price. Convenience was more important, while brand name and trends were less important mid-COVID than pre-COVID. For differences between mid-COVID and post-COVID intentions, three factors were statistically different. Brand name, color options, and trends were stronger post-COVID than mid-COVID. There were no significant differences in price and convenience post-COVID and mid-COVID. Finally, when comparing pre-COVID to post-COVID, there were significant differences for all factors except for price. Convenience was more important post-COVID, while color options, trends, and brand name were statistically more important pre-COVID.

Table 3: Mean Importance Scores for Each Factor Pre, Mid, and Post-COVID

Time/Factor	Convenience	Brand Name	Price	Color Options	Trends
Pre-COVID	4.81	4.29	5.82	5.25	3.16
Mid-COVID	5.01	4.14	5.85	4.90	2.97
Post-COVID	5.00	4.23	5.81	4.99	3.08

Importance scale ranged from a 1 = Very unimportant to 7 = Very important

Table 4: Comparison in Means for Factor Importance between Pre, Mid, and Post-COVID

Type	Pre – Mid			Mid – Post			Pre – Post		
	Mean Difference	<i>t</i>	p-value	Mean Difference	<i>t</i>	p-value	Mean Difference	<i>t</i>	p-value
Convenience	-.199	-5.185	.000	.016	.457	.646	-.183	-4.871	.000
Brand Name	.156	5.433	.000	-.097	-4.051	.000	.059	2.005	.045
Price	-.029	-1.083	.279	.036	1.671	.095	.007	.269	.788
Color Options	.346	11.658	.000	-.083	-3.616	.000	.262	9.600	.000
Trends	.192	7.491	.000	-.103	-4.574	.000	.089	3.435	.001

The survey also asked if participants used 17 different cosmetic brands pre-COVID and mid-COVID; however, only the top ten are included in Table 5. E.L.F. Cosmetics had the highest score with almost half of the sample pre-COVID (45.1%, N = 774) and mid-COVID (42.6%, N = 730). Fenty Beauty had the lowest score but was still almost a fifth of the sample with 19.6% of the participants (N = 336) pre-COVID and 17.7% (N = 303) mid-COVID. Please see Table 5 for the results of the other eight brands.

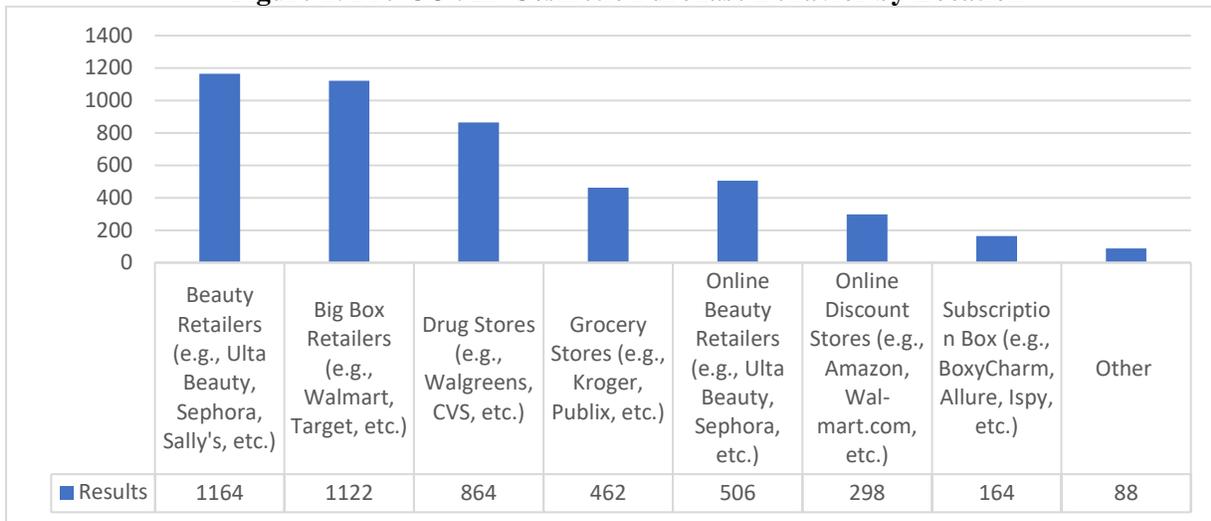
Table 5: Brand Choice Percentages for Pre and Mid COVID-19

Brand	Pre-Covid	Mid-Covid
E.L.F.	774 (45.1%)	730 (42.6%)
Maybelline	747 (43.6%)	706 (41.2%)
COVERGIRL	539 (31.4%)	519 (30.3%)
Too Faced	486 (28.3%)	398 (23.3%)
Urban Decay	421 (24.5%)	330 (19.2%)
Wet N Wild	390 (22.7%)	381 (22.2%)
L’Oreal Paris	383 (22.3%)	369 (21.5%)
MAC	383 (22.3%)	331 (19.3%)
Colour Pop	349 (20.3%)	302 (17.6%)
Fenty Beauty	336 (19.6%)	303 (17.7%)

* Respondents were permitted to select all that apply to this question.

Respondents were also asked where they typically purchased cosmetic products pre-COVID (See Figure 1). The buying choices for pre-COVID were beauty retailers, big box retailers, drug stores, grocery stores, online discount stores, subscriptions, and the other option for choices that were not listed. Beauty retailers like Ulta Beauty and Sephora and big box retailers like Wal-Mart and Target were the most popular buying options at 1,164 and 1,122 participants. Online discount stores and subscription boxes were the least popular at 298 and 164 participants

Figure 1: Pre-COVID Cosmetic Purchase Behavior by Location



* Respondents were permitted to select all that apply to this question.

When examining cosmetic purchase locations mid-COVID, location options include brick & mortar beauty retailers, online beauty retailers, drug stores, and online (See Table 6). Participants were asked the frequency of purchase behavior at each location using a 1 to 5 scale ranging from Never to Always. Although none of the locations were purchased from often, results indicate that drug stores followed closely by the brick & mortar beauty retailers were purchased from the most often.

Table 6: Mid-COVID Cosmetic Purchase Behavior by Location

Location	1	2	3	4	5	Mean
Brick & Mortar beauty retailers (e.g. Ulta Beauty, Sephora, etc.)	639 (37.2%)	646 (37.7%)	132 (7.7%)	218 (12.7%)	81 (4.7%)	2.10
Online beauty retailers	880 (51.35%)	474 (27.6%)	133 (7.8%)	172 (10%)	56 (3.3%)	1.86
Drug stores (e.g. Walgreens, CVS, etc.)	527 (30.7%)	636 (37.1%)	184 (10.7%)	284 (16.6%)	84 (4.9%)	2.28
Online (Amazon, Wal-Mart, etc.)	895 (52.2%)	456 (26.6%)	107 (6.2%)	189 (11%)	68 (4%)	1.88

Scale ranged from 1 = Never to 5 = Always

Finally, participants were asked where they intend to purchase cosmetics post-COVID (see Table 7). For post-COVID, participants used a seven-point scale ranging from extremely unlikely to extremely likely. Respondents were most likely to purchase from drug stores (mean = 4.60), followed closely by brick & mortar beauty retailers (mean = 4.41). Online beauty retailers (mean = 3.84) and other online options (mean = 3.73) were more unlikely to be purchased from post-COVID.

Table 7: Post-COVID Location Cosmetic Purchase Intentions Likelihood Score

Location	1	2	3	4	5	6	7	Mean
Brick & Mortar beauty retailers (e.g. Ulta Beauty, Sephora, etc.)	316 (18.4%)	126 (7.3%)	125 (7.3%)	128 (7.5%)	321 (18.7%)	382 (22.3%)	317 (18.5%)	4.41
Online beauty retailers	436 (25.4%)	175 (10.2%)	136 (7.9%)	162 (9.4%)	309 (18%)	283 (16.5%)	214 (12.5%)	3.84
Drug stores (e.g. Walgreens, CVS, etc.)	258 (15%)	116 (6.8%)	91 (5.3%)	144 (8.4%)	403 (23.5%)	380 (22.2%)	323 (18.8%)	4.60
Online (Amazon, Wal-mart, etc.)	461 (26.9%)	178 (10.4%)	143 (8.3%)	183 (10.7%)	279 (16.3%)	269 (15.7%)	202 (11.8%)	3.73

Likelihood scale ranged from a 1 = Extremely unlikely to 7 = Extremely likely

Participants were also asked an overall question related to changes in current cosmetic usage (see Table 8). First, 36.9% (N = 633) of participants stated that they still wear the same number of cosmetics, while 23.3% (N = 400) of participants stated they still wear makeup but not as often. In addition, 13% (N = 223) of participants stated they still wear makeup a few times a week and, lastly, 26.8% (N = 459) of participants stated they hardly wear makeup anymore. Finally, when asked how important wearing cosmetics is, 24% (N = 412) said wearing cosmetics was moderately important, 35.2% (N = 603) felt wearing cosmetics was slightly important to them, and 31% (N = 531) felt wearing cosmetics was not important at all.

Table 8: Overall Changes in Cosmetic Usage Since COVID

Answer Option	Number
Not very much (I still wear the same amount of cosmetics.)	633 (36.9%)
Somewhat (I still wear makeup but not as often.)	400 (23.3%)
Moderately (I still wear makeup a few times a week.)	223 (13%)
Drastically (I hardly wear makeup anymore.)	459 (26.8%)
Mean	2.30

Comparison in Attitudes

In order to determine if there were differences in attitudes related to resilience, emotional engagement, positivity, intrinsic motivation, emotional exhaustion, fashion consciousness, attitudes towards brand names, and attitudes towards wearing cosmetics, two groups were created (non-users vs. daily users) for each cosmetic type. These two groups were based on the intentions to wear the different cosmetic types post-COVID, with respondents predicting they would never wear that cosmetic type in one group. Respondents that stated that they predicted they would wear that cosmetic type daily in the second group. Due to the overwhelming number of respondents that stated they planned on wearing skincare daily, only the cosmetic types of face, eye, and lip were

included in this analysis. Using the summed scores for each of the attitudes, a comparison between means using analysis of variance (ANOVA) was completed.

For face cosmetics, there were four attitudes with statistically significant differences. These include emotional engagement, fashion consciousness, attitude toward brand names, and attitude towards wearing cosmetics. Respondents who indicated that they planned on wearing face cosmetics daily had higher emotional engagement and fashion consciousness than those that predicted they would never wear face cosmetics post-COVID. In addition, respondents who intended to wear face cosmetics daily had stronger attitudes toward both brand names and wearing cosmetics than those who did not plan on wearing face cosmetics after COVID. There were no statistically significant differences between those that stated they would never wear face cosmetics. Those who would always wear face cosmetics post-COVID shown resilience, positivity, intrinsic motivation, and emotional exhaustion. See Table 9 below for details related to this analysis.

Table 9: Comparison Between Never and Daily for Face Cosmetic Post-COVID Intentions

Attitude	Mean (Never)	Mean (Daily)	F-Statistic	p-value
Resilience	25.9013	25.7949	0.014	0.907
Emotional Engagement	24.4305	26.5214	5.610	0.018
Positivity	37.9596	39.7863	2.679	0.103
Intrinsic Motivation	23.2422	23.7949	1.451	0.229
Emotional Exhaustion	27.3677	26.4530	0.487	0.486
Fashion Consciousness	8.9641	12.7521	58.726	0.000
Attitude toward Brand Names	10.8565	15.7521	171.196	0.000
Attitude towards Wearing Cosmetics	13.7130	16.8803	26.601	0.000

* There were 223 respondents that answered never and 117 respondents that answered daily.

When examining the differences between those that stated they would never wear eye cosmetics post-COVID and those that would wear eye cosmetics daily, there were four statistically significant different attitudes (see Table 10). Respondents who intended to wear eye cosmetics daily had statistically higher levels of emotional exhaustion and were more fashion conscious than those who did not intend to wear eye cosmetics post-COVID. As with face cosmetics, respondents who planned on wearing eye cosmetics daily also exhibited stronger attitudes toward both brand names and wearing cosmetics than those who did not plan to ever wear eye cosmetics. There were no significant differences between these two groups for resilience, emotional engagement, positivity, and intrinsic motivation.

Table 10: Comparison Between Never and Daily for Eye Cosmetic Post-COVID Intentions

Attitude	Mean (Never)	Mean (Daily)	F-Statistic	p-value
Resilience	26.6942	26.0080	0.641	0.424
Emotional Engagement	25.2397	26.2000	1.313	0.253
Positivity	38.5372	39.1000	0.289	0.591
Intrinsic Motivation	23.3719	23.9240	1.805	0.180
Emotional Exhaustion	24.9587	27.3600	3.938	0.048
Fashion Consciousness	8.3719	12.0600	56.120	0.000
Attitude toward Brand Names	10.5455	14.1960	89.232	0.000
Attitude towards Wearing Cosmetics	13.6446	16.4680	25.750	0.000

* There were 121 respondents that answered never and 250 respondents that answered daily.

For lip cosmetics, there were also four statistically significant differences between respondents who predicted to wear lip cosmetics daily versus those that predicted to never wear lip cosmetics. Respondents who intended to wear lip cosmetics daily were more positive and fashion conscious than those who intend to never wear lip cosmetics. Daily lip cosmetic wearers also had stronger attitudes towards both brand names and wearing cosmetics than those who never intended to wear lip cosmetics post-COVID. There were no significant differences between the two groups for resilience, emotional engagement, intrinsic motivation, and emotional exhaustion. See Table 11 for more details.

Table 11: Comparison Between Never and Daily for Lip Cosmetic Post-COVID Intentions

Attitude	Mean (Never)	Mean (Daily)	F-Statistic	p-value
Resilience	25.3186	26.0385	0.772	0.380
Emotional Engagement	24.8319	25.6382	1.123	0.290
Positivity	36.6372	39.1725	7.062	0.008
Intrinsic Motivation	23.0708	23.8576	3.868	0.050
Emotional Exhaustion	29.1504	27.2412	2.878	0.090
Fashion Consciousness	9.5841	10.9883	9.277	0.002
Attitude toward Brand Names	11.7257	13.0988	13.061	0.000
Attitude towards Wearing Cosmetics	13.4071	16.2412	28.465	0.000

* There were 113 respondents that answered never and 597 respondents that answered daily.

Discussions and Implications

Cosmetics companies have been concerned that consumers are not using or purchasing cosmetic products with the same frequency as before COVID-19 due to mask mandates and remote work/school. The likelihood that this reduced cosmetic usage would continue even after COVID-19 was also worrisome for those in the cosmetic industry (Tan, 2020). The cosmetic industry must understand what has changed in consumers' priorities and feelings towards cosmetics post-COVID due to millions of jobs and large companies potentially at stake. Because of this, the goal of this study was to investigate changes in behaviors and attitudes as it relates to cosmetic usage by female students pre, mid, and post-COVID.

Survey results show that cosmetic consumers will return to previous behaviors post-COVID. Although face, eye, and lip cosmetic usage dwindled mid-COVID, post-COVID intentions returned to near pre-COVID levels. Based on the comparison of means, these usage changes between pre, mid, and post-COVID were statistically significant, for the most part. Participants reduced their usage of each cosmetic type (face, eye, lip, and skin) mid-COVID as compared to their pre-COVID levels. Participants also intended to increase their cosmetic type usage post-COVID from their mid-COVID levels. The exception was when comparing pre-COVID and post-COVID intentions. Except for face cosmetics, there were no significant differences in pre-COVID and post-COVID intentions for eye, lip, and skin cosmetic types. For face cosmetics, participants used face cosmetics more pre-COVID than they plan to post-COVID. Now, many consumers are trading in lipstick and foundation for eye cosmetics and lighter products like lip gloss (King, 2020).

Additionally, these results show that participants will go back to normal usage in eye and lip cosmetics. Skincare remained the highest level of usage pre, mid, and post-COVID. The NPD Group's findings from the 2020 Women's Facial Skincare Consumer Report also support this, with 22% of women stating they changed and increased their skincare routine and usage (NPD, 2020). With that said, this is highly positive for the cosmetic industry because the pandemic did not dismantle the need for beauty products. However, there are still shifts in consumer behavior and priorities.

Many consumers have dealt with drastic changes in everyday life, and with that, priorities change. Price has and will continue to be the highest priority for participants and is currently more important than pre- and post-COVID. Target is one of many retailers taking price seriously by providing several clean beauty products, and most products are under \$15 (Swanson & Robin, 2020). Next, brand name was important pre-COVID, became less essential mid-COVID, and is expected to return to previous importance with post intentions. Many consumers are not as concerned with luxury brand names when on a budget or have far more important things to prioritize. Convenience became more important mid-COVID and will continue to be important post-COVID. Considering many store closures during the height of COVID breakouts, finding easy ways to purchase cosmetics became a higher priority. Additionally, making the overall experience of purchasing cosmetics without the help of a consultant became a priority. For example, brands like L'Oreal have virtual makeup software that allows consumers to try on different makeup before making a final purchase (Gilliland, 2021). Color options were important pre-COVID but are now a lower priority. Lastly, trends were the lowest priority out of all factors but are expected to reach pre-COVID results for future intentions. Beauty experts state that trends

are becoming a thing of the past, and consumers are more focused on creating their own unique styles (Montell, 2019).

Since results indicated that price and convenience are amongst the more important factors for post-COVID, it makes sense that the top three cosmetic brands mid-COVID are E.L.F. 42.6% (N = 730), Maybelline 41.2% (N = 706), and COVERGIRL 30.3% (N = 519). Each of these brands can be found in drugstores and are amongst some of the most successful brands within the industry. Tarang Amin, CEO of E.L.F., stated that E.L.F. is a top five beauty brand and that the brand has had a successful start to 2020 (Rao, 2020). Lastly, 36.9% (N = 633) stated they still wear the same number of cosmetics as they did pre-COVID, 23.3% (N = 400) indicated their usage has somewhat changed, but they still use makeup. Lastly, 26.8 % (N = 459) stated their usage had changed drastically, and they barely wear makeup anymore. These results show that many women still wear makeup most of the time, but over a quarter of participants stated their usage has drastically changed. Changes from wearing masks and working for home are reason to consider with consumer completely changing their cosmetic purchasing (Altman, 2020).

When analyzing attitudes of consumers, it is important to note that consumers who wear cosmetics frequently appear to be more positive, resilient, and fashion conscious than those who do not wear cosmetics. Samantha Boardman, MD, clinical instructor, advises her patients to put on lipstick if they struggle staying indoors (Stalder, 2020). In fact, studies have shown wearing makeup boosts test scores, which inevitably connects to enhanced productivity (Stalder, 2020). If makeup can improve productivity as well as add much-needed normalcy, it is crucial that cosmetic brands convey this connection. Many consumers are simply looking for the relatable separation of working from home and still looking and feeling professional (Creswell, 2020).

Recommendations

Based on these results, multiple recommendations can be provided to those in the makeup industry. Some of these recommendations include:

- Luxury cosmetics should maintain their prices to maintain prestige. The results do not indicate that high-cost brands should have lower prices.
- Incorporating a skincare line into each brand
- Incorporating products like cleansing wipes
- Putting less emphasis on face makeup and more focus on tinted moisturizers, lip cosmetics, eye cosmetics, and skincare products
- Focusing more on natural-looking cosmetics like chapstick, lip gloss, and BB cream
- Putting skincare products in the same aisles as makeup brands
- Making price a priority and fair to cost conscious-consumers
- Having a mass sale promoting the end of the pandemic
- Prioritize overnight shipping options
- Implementing software or an app for a brand to allow consumers to try on different shades and types of cosmetics
- Creating a color match software
- Makeup ideas and recommendations on the website with specific products used or purchased
- Makeup options when wearing masks

- Tips and tricks on what skincare products to use for maskne (mask acne)
- Creating ad campaigns that focus on positive attitudes in wearing makeup again in a fashionable or trendy way
- Creating ad campaigns that are relatable and sympathetic towards cosmetic consumers regarding COVID-19
- Membership changes that give consumers more incentive to become members

Limitations and Future Research

In all academic research, limitations exist that provide avenues for further research. First, this study was quite limited because all participants were female university students, and 85.6% (n = 1,468) were between ages 18 and 24. There are limitations when only surveying college students in one specific region because results will be specific to that sample, and the cosmetic industry is incredibly extensive. For future research, it is recommended to take a much larger sample of participants across a country or region so that there is a general consensus of attitudes and behaviors for a broader population. In this instance, college students resulted in having a relatively low income. With that, there is little information or representation of high-cost brands in this study, and this limitation does not fully answer how the pandemic impacted high-end makeup brands or predict how they will recover. In addition, although there were a variety of attitudes and factors measured in this study, it is possible that there are other attitudes or importance factors that could be included. Lastly, answer choices related to the purchase locations used pre, mid, and post-COVID were not properly matched (scale point differences). By not properly assigning each question with the same answer options, it is difficult to compare these results. In the future, it is crucial to make sure the answer options are consistent.

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