



Korean Makeup in the Mexican beauty industry: Market penetration strategies and opportunities.

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Abstract

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This thesis is a research-based project for the International Business bachelor's Degree Program at Haaga-Helia University of Applied Sciences developed on the topic of Korean cosmetics in the Mexican cosmetic industry. This thesis had as an objective to identify the business opportunities that Korean cosmetic companies and Korean cosmetic distributors in Mexico may have in the Mexican cosmetic market by achieving a general and updated understanding of both industries and how they operate. Recommendations and information found through qualitative and quantitative research for these shareholders to appeal to and satisfy Mexican costumers, were included in this paper.

The research methods applied to develop this thesis were literary investigation from trustworthy sources and the recollection of data from surveys applied to K-beauty distributors in Mexico and an interview with a certified makeup professional with online media and content creation experience. This thesis aimed to fulfill said objective by compiling trustworthy information from reliable sources and first-hand insight and data from individuals and companies currently involved in the industry.

The research results gathered from qualitative and quantitative methods (interview and survey) were explained in detail and presented as conclusions and recommendations regarding the preferences of consumers on social media marketing, purchasing behavior, buyer persona of the Mexican K-beauty consumer, etc.

Key words: K-beauty, Mexican cosmetic industry, digital marketing, K-beauty distributors, costumer identity, Hallyu.

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1. Introduction

This is a research-based thesis for the International Business bachelor's Degree Program at Haaga-Helia University of Applied Sciences. The purpose of this work is to create a research project in efforts to achieve graduation from the program after completing all requirements of academic studies pertaining to the degree.

This paper contains research to find what business opportunities that Korean makeup companies can find in the Mexican cosmetics market. The research intends on exploring the possibilities of market penetration following the strengthening of economic relations between both countries in the last few years.

The reasoning behind this includes the growing interest in Korean contemporary culture and products, as evidenced by young Mexican consumers and the plans for a Free Trade Agreement between the two countries. (Consejo Nacional Agropecuario 2022). The trade of these mass-produced high-quality products could represent a great win for the South Korean cosmetic industry and would help strengthen commercial relationships with Mexico and Latin America.

This paper consists of detailing the background of the industry being studied, the market relationship between Mexico and South Korea and existing data contributing to the feasibility of a business opportunity for Korean cosmetic products in Mexico. This paper also explains the research to be applied during the thesis process and the reasoning behind each method chosen to substantiate its results. This research includes surveys with real life Korean beauty product distributors in Mexico, as well as interviews conducted with people with expertise pertaining to Asian beauty styles applied to Mexican people.

Through this paper important information to understand the topic at hand is provided, including key words, definitions of key concepts and background information about Korean beauty products and industry.

1.1 Background

In recent years, Korean industries have experienced exponential growth around the world. According to the OEC, in 2020, South Korea was ranked as the 10th largest economy in the world (by GDP) and 5th in total exports worldwide among many other impressive rankings (Statista 2020). The list of Korean goods being successfully exported includes Korean cosmetic products, which have reached the west and managed to penetrate the cut-throat North American market. Leading this phenomenon is the Korean skincare and makeup industry (Korean Cosmetics Association

2020). These two industries have become a staple of Asian beauty products and are known worldwide for their quality, effectiveness, and refreshing concepts.

Proving to be a highly profitable business, Korean companies are contemplating active expansion into other countries in the western hemisphere, specifically Latin American countries. Therefore, it is relevant for Korean cosmetic companies to ask: **what are the opportunities for Korean makeup to enter the Mexican beauty market?** (RQ)

The solid concepts behind K-beauty have built a strong sense of identity which appeals to its consumers and makes it easier for them to relate to what its products. This has become one of K-beauty's strongest selling points and it is reflected in their global success. According to Statista, in the crisis-ridden 2020 the Korean cosmetic market size amounted to 7.6 trillion South Korean won. Despite suffering a drop from the previous year's number of 10,11 trillion SKW, the market is still showing a considerate growth rate.

The commercial, cultural, and friendly relationship between Mexico and South Korea is not something new. This relation dates to the beginning of the 20th century, in 1905, when Korean immigrants landed on the shores of the Yucatan Peninsula seeking jobs and a better life in the in the North American country. (Kim 2006).

After Mexico-Korean diplomatic relations were established in 1962, the second wave of Korean immigrants arrive in Mexico in the late 60's. (Kim 2006). This friendship has evolved into great commercial and business relations that will be consolidated with the drafting and signing of a Free Trade Agreement between the two countries.

The negotiations for a bilateral free Trade Agreement were reported on the official Mexican government website (gob.mx) on March 2nd, 2022. The finalization of this commercial took place on July 5th, 2022, creating even more opportunities for Korean cosmetics business in Mexico in the next few years. (Consejo Nacional Agropecuario 2022). It can be suggested that the Korean cosmetic industry has a bright future ahead in Mexico.

In conclusion, it can be estimated that the Mexican market is a good opportunity for Korean cosmetic companies to consider further expansion and growth. For this to be successful, it is important for these companies to understand the Mexican audience. The correct grasp of the areas of opportunity to create products more accessible for this target audience, could open doors for greater and better business in Mexico and other Latin-American countries.

1.2 Research Question

This thesis expects to expand the knowledge surrounding the possibility for business and marketability of Korean cosmetics in Mexico and to answer the proposition pertaining to this topic for stakeholders. The outcome of this research shows insight on the market size, consumer behavior, marketing strategies and opportunities, and industry culture related to Korean makeup and Latin American audiences. This paper hopes to hold the capacity of being used at company level and other business models.

The research question is: **What are the opportunities for a Korean Makeup company to enter the Mexican beauty industry and market?**

To provide an adequate scope as a base for this thesis, the research question is being broken down into investigative questions.

The investigative questions are:

1. What are the characteristics of the Mexican cosmetics industry compared to the Korean cosmetics industry?
2. What are the factors that hinder and motivate Mexican consumers from using K-makeup?
3. What does the Mexican K-makeup consumer look like?
4. What are the product adaptation strategies that Korean makeup brands can adapt to enter Mexican makeup market?

This Overlay Matrix shown below illustrates the theoretical framework, chosen research methods, and the future chapters conforming this thesis. It provides aid for the reader to better understand the text and interpret the results.

Table 1. Overlay matrix (Author 2022)

Investigative Questions (IQs)	Theoretical Framework ¹	Methods	Results chapter
IQ 1. What are the characteristics of the Korean cosmetics industry compared to the Mexican cosmetics industry?	2.1, 2.2, 2.5, 2.6	Desktop research. Interview	4.1, 5.1

<p>IQ 2.</p> <p>What does the Mexican K-beauty consumer look like?</p>	<p>2.1, 2.3, 2.5, 2.6.</p>	<p>Desktop research</p> <p>Interview</p> <p>Survey</p>	<p>Interview: 4.1, 5.1</p> <p>Survey: 4.2, 5.1</p>
<p>IQ 3.</p> <p>What are the factors that hinder and motivate Mexican consumers from using K-beauty?</p>	<p>1.7, 2.1, 2.3, 2.5, 2.6.</p>	<p>Desktop research</p> <p>Interview</p> <p>Survey</p>	<p>Interview: 4.1, 5.1</p> <p>Survey: 4.2, 5.1</p>
<p>IQ 4.</p> <p>What are the product adaptation strategies that Korean makeup brands can use in the Mexican makeup market?</p>	<p>2.3, 2.5, 2.6, 2.7.</p>	<p>Desktop research</p> <p>Interview</p> <p>Survey</p>	<p>Interview: 4.1, 5.1</p> <p>Survey: 4.2, 5.1</p>

1.3 Demarcation

The research and methods applied during this thesis have the Mexican consumer of K-beauty products as its focus. This targeted “buyer persona” is not limited strictly to nationality in terms of the needs and wants of K-beauty customers that share similar physical characteristics with the general Mexican user demographic.

Due to the diversity existing in Mexico and other Latin American countries, the opinion of other Latin-American users’ opinion referring to people of darker complexion’s needs and wants for k-makeup become valid in this research. The similarity in physical diversity shared by Latin American countries can contribute to good qualitative data collection through surveys and interviews conducted with K-beauty product distributor stores in Mexico and K-beauty experts within the right scope of criteria that agree to participate.

In summary, this target is narrowed down to Mexican distributors of K-beauty products and people with certified experience in the field that can provide valuable insight to the needs and wants of consumers of K-beauty living in Mexico.

The determined scope allows the thesis to focus on real opinions of recurrent and potential consumers and on the specific business sector of the market. The reason why the term “K-beauty products” and “K-beauty cosmetics” is used generally throughout this paper is due to the range of products included in the K-beauty industry.

Due to the blurred lines between makeup and skincare concepts within the Korean makeup culture it is not entirely possible to leave out skincare products completely from this research. However, during interviews and surveys the questions are properly formulated to show the difference between both and ensure clear data and results.

The research was carried out through qualitative methods to answer IQ 1-4, this approach allowed for specific and first-hand insight to the consumer behavior and needs of the target audience for this research. The questions were created without “leading” intent to get honest and raw opinions from the participants and resulted in a critical point of view from the desired target audience.

1.4 International Aspect

The international quality required from this thesis project is fulfilled by several features. The nature of the products being marketed from one country to another. This project is based on the study of a business relation and economic gain between two countries from different continents.

The research methodology which includes surveys and interviews with parties directly involved in the business and industry. E.g., K-beauty content creators and K-beauty distributors in Mexico that agree to participate on the surveys applied. The writer of this thesis project traveled to South Korea for 3 months approx. to acquire real life experience on the topic and procure contacts for the interviews and surveys to be conducted as well as personally inspecting K-beauty products as a Mexican consumer.

1.5 Benefits

The objective of this thesis is to benefit stakeholders in South Korea and Mexico in the shape of existing companies or entrepreneurs who are planning to expand or create business with Korean cosmetic products between these two countries.

The potential stakeholders benefited from this paper can find supporting research to create properly oriented products, suggestions of viable marketing sufficient knowledge to modify their existing products to accommodate a new market and produce positive economic growth and international relationships.

This research has the potential to benefit those people who admire and love K-beauty products and cosmetics but struggle to find the accessibility or inclusivity in their favorite makeup concepts and products. When companies apply this type of information into their business, people are facilitated with the tools to draw their sense of identity and self-expression through makeup and style. This benefits society and contributes to the emotional fulfillment of people.

Moreover, this topic is an area of interest and passion for me. I have years of experience using and dwelling into K-beauty and have encountered issues trying to find the right products for my needs. Working on this thesis is of great benefit to me academically and personally. This project allows me to deepen my understanding of marketing and research studies and find solutions to my personal and professional ambitions. This experience will aid me in the process of application of my degree and grant me knowledge to further my career ambitions in the future.

Finally, this type of research also benefits the relations between Mexico and South Korea by creating a precedent of research and interest to encourage further cooperation and interest, strengthening the international bond.

1.6 Risks and risk management

This chapter presents the risk analysis surrounding the factors that may arise during the research. Because the objective of this thesis focuses on finding out what opportunities does K-beauty have in Mexico, the process to achieve this objective relies on empirical research methods that include collecting data directly from survey participants, interviews, and company participation.

The previously mentioned factors represent limitations to the research, this means that finding reliable survey participants and company participation can be difficult and this in turn, can directly affect the amount of data collected to get an optimal result at the end of the study.

If there are not enough or reliable survey participants, then the information collected may not be sufficient to make an accurate conclusion. The recurrence for this type of risk is high and that is why there has been a prior engagement and contact with the appropriate groups that can take part in this qualitative research methods and relying on the snowballing effect to amplify the scope of participants.

To collect accurate data to understand the ideal Mexican k-beauty customer and their needs, an appropriate method to make the right questions for the interviews and formulate approachable surveys. These questions must be clear, understandable, not misleading and focused on the research objective.

The following table represents the common risks that can appear during the research process, the estimated impact and probability of them arising and the possible methods to contain these risks. The second table is a matrix to code the levels of impact and probability.

Table 2. Risk management matrix (Author 2022)

Risk	Probability	Issue	Impact	Management method
Problem with the surveys	2	Not getting enough people to participate.	7	Make early contact with the targeted groups across platforms. Active posting of the survey.
Problem with the companies.	3	No companies want to answer or participate.	2	Change the focus to include already existing information available on these companies and other literature publications.
Problem with the interviews.	2	The chosen content creator backing out of the interview.	5	Have several possible contacts that can possibly do interviews in case one falls through.
Lack of information.	2	Not enough specific or published information on the topic.	6	Research sources in Spanish, Korean and English. Use other methods (theses, books, articles, biographies, etc) to support the thesis.
Not enough time	2	Not sending the surveys on time to collect data.	7	Create and follow a project schedule to structure, create, post and collect all the data. Ex. Thesis planner on Notion app.

Table 3. Probability and impact code matrix (Author 2022)

Probability	Impact
1 Unlikely	1 Insignificant
2 Possible	2 Minor
3 Likely	3 Moderate
	4-5 Significant
	6-9 Intolerable

1.7 Key concepts

To understand this paper, the following chapter contains definitions and descriptions of central concepts to facilitate the reader's understanding of topics related to the thesis. These concepts are related to the Korean beauty industry and will be mentioned along this paper.

K-beauty: "K-Beauty (Korean Beauty) can be considered as an explicit representation of the South Korean cosmetic sector and a phenomenon that has begun to influence the global cosmetic industry itself. Similarly, this phenomenon has influenced trends and consumption habits in the field of skin care." (Calle, Jiménez, Vanegas 2019).

E-commerce: usually refers to the use of the Internet, mobile applications, and browsers on mobile devices to carry business transactions. In short, E-commerce digitally enables commercial transactions between companies and individuals and among them. (Laudon & Traver 2018) E-commerce can be divided into B2C (Business to Consumer), B2B (Business to Business), C2C (Consumer to Consumer), M-Commerce (Mobile E-commerce), Social E-commerce, and Local E-commerce. (Laudon & Traver 2018).

Asian beauty standards: “Fair skin, a well-defined nose, peachy cheeks, and cherry-red lips.” “The art and stories that were passed down for hundreds and even thousands of years in the culture display a common thread when it comes to the ideal concept of female beauty.” (Asian Society.org 2022).

Korean skincare: Korean skin care focuses on prevention and protection rather than the use of products to undo damage. (Healthline 2021).

Hallyu: Hallyu, or Korean Wave, is the word depicting the popularity of the culture of the Republic of Korea, including K-pop music and K-dramas. (Haughland 2020).

Makeup/foundation shade: Foundation is a form of face makeup. It is a product used all over your face to create an even base — or foundation — for the rest of the makeup. The right formula can help cover blemishes, correct your skin tone, blur imperfections, and create an overall smooth and even canvas. (Loreal Paris 2022).

Cushion compact: a cosmetic product that combines a compact case with a special sponge soaked with base makeup, including products like foundation or sunblock with the purpose of reapplication. (The Korea Times 2023).

Porter’s 5 forces: Porter's Five Forces is a business analysis model published by Michael Porter in 1979, that helps to explain why various industries can sustain different levels of profitability. Porter identified five undeniable forces that play a part in shaping every market and industry in the world. This model is commonly used to measure competition intensity, attractiveness, and profitability of an industry or market. (Investopedia 2023).

2. K-Beauty

In this chapter the thesis presents important base points to define K-beauty and several topics regarding its characteristics and impact both domestically and internationally with a focus on Latin America. The topics presented here provide a baseline to guide the author through the research process and to create the structural knowledge to gain understanding of the state of the industry and its market opportunities in Mexico. These points include key concepts, models, background information, and theories useful to the paper.

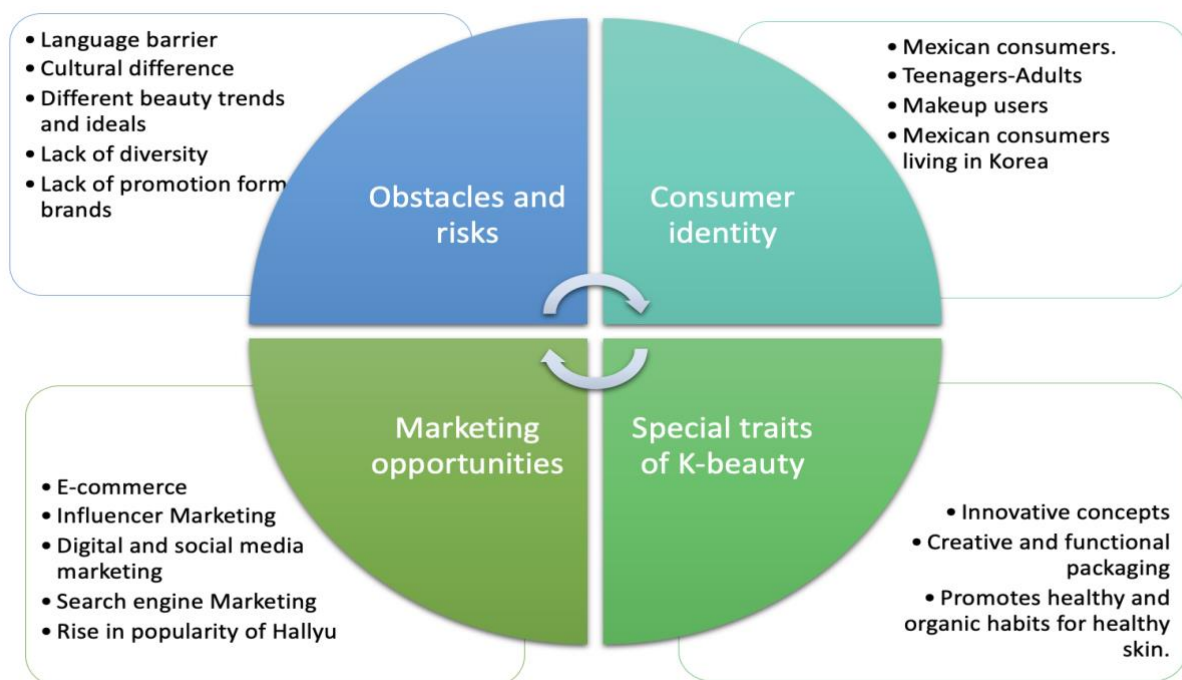


Figure 1. Key Concepts (Author 2022)

These main categories, as represented in Figure 1, help the development of the research design, and lay the groundwork for the formulation of the data collection tools. The concepts above lay the framework for this thesis and its objective.

2.1. Definition

One of the most important concepts to define in this paper is “K-beauty”. According to Mundo Asia Pacifico Magazine, K-beauty can be defined as an explicit representation of the South Korean

cosmetic industry and a generic way of encompassing the phenomenon that involves cosmetic products.

Korean beauty or “K-beauty” is centered around the concept of healthy and beautiful skin. Thus, K-beauty and its products focus on bringing out the natural beauty of the wearer instead of covering the face with heavy products. Unlike some modern western trends and products, Korean makeup can be aligned with recent skin care and wellness movements. In Korea and other parts of Asia, achieving a glowing look from the inside out with makeup is a goal for beauty and individual worth (Yang, Ganse, Jimenez 2019).

Korean traditional beauty ideas include using only natural and skin ingredients in cosmetic ointments and products to achieve clear and natural-looking skin; this has been continued by contemporary cosmetic companies and has helped them gain the trust and loyalty of their clients.

K-beauty is popular and well-known for maintaining good quality and beautiful products. The packaging is exciting and fun. Brands are trust-worthy and can even be endorsed by the consumer’s favorite Korean celebrities (making the product even more desirable and coveted among buyers). This “trust” and interest has only grown exponentially after the rise of “Hallyu” or the “Korean wave”. This term is used for depicting the popularity of the culture of the Republic of Korea, including K-pop music and K-dramas. (Haughland 2020).

The use of the term “Hallyu” started in the 90's when Korean pop groups and music gained popularity in China and slowly made their way to international recognition. Although this phenomenon has three decades in the making, the last few years have seen an exponential growth of Korean media’s popularity (K-pop music, Korean food, K-dramas, movies, Korean fashion, and K-beauty), thanks to the viral nature of social media and the practicality of the internet and online streaming services.

The popularity of Hallyu has reached the Latin American market and is stronger than ever, which in turn has made every other by-product of Korean pop-culture a point of interest for fans and curious people alike. (Han 2017). According to a study made in 2019, the consumer's involvement with Korean culture would either increase or diminish their interest in a product. An increased interest in or desire to connect with a particular culture would impact the desirability of a product. (Lee, Sung, Phau, Lim 2019).

Although it is a quite recent term, K-beauty started to have a strong influence in the western market from the 2000s thanks to huge retailers following the growth of the Hallyu wave that was taking speed at the time. These distributors included major makeup sellers such as Ulta and Sephora,

however other great retailers from Walmart to Nordstrom also displayed these products on their stands, consolidating K-beauty's presence in the global cosmetic market.

2.2. Market trends in the K-beauty industry

There are several market trends that can be found within the K-beauty industry according to InvestKorea.org, a national investment promotion agency whose aim is to support the establishment of foreign businesses in South Korea. (InvestKorea.org 2020).

One of these trends is the expansion of a functional cosmetic market. Complex-function cosmetics (products with mixed characteristics from medicine and cosmetics) show the highest share of 14.7% and growth trend, and single-function products show a slight decline. According to InvestKorea.org, this is illustrated by the production data for products related to hair dye, hair loss, acne, hair removal, and atopy newly added to the functional cosmetics category in 2017. Hair dyes accounted for 1.4% of the total in 2018, followed by hair loss-related products at 1.1%, with the others showing insignificant shares.

Another current trend includes changes in cosmetics distribution. A notable change in distribution according to InvestKorea.org is that there has been a decrease in sales of single-brand shops centered on offline stores. Likewise, there is a restructuring of the offline market to focus on specialty multi-brand cosmetics shops and H&B (Health and Beauty) stores, dealing in various brands, with the support of young consumers.

An example of this is how Olive Young (the largest H&B store in Korea), has created a store brand called Lalavla with Watsons (a drug store chain) which has strengthened its skin-care category. On the other side, another beauty retailer in South Korea, CHICOR, has focused on specializing in the color cosmetics category to become more competitive in the market, and Sephora, a global cosmetics distribution chain opened its online and offline stores in October 2019. (InvestKorea.org 2020).

As the online and mobile markets continue to grow explosively, the same goes for the products and platforms that are tailored to consumers from their teens to their 30s, who are the main customers of these distribution channels. The development and introduction of various mobile payment systems serve as catalysts for market growth.

Companies like Aekyung, L&P Cosmetic and Carver Korea are focusing on entering the overseas market with "hit products" that have grown through home shopping channels. Recently, there have been several hit products which first became popular in duty-free shops and overseas markets as well.

2.3. K-beauty online shopping and the effects of Covid 19

The beauty industry relies in customer service and face to face service at its very core, due to this, the whole industry experienced a huge hit in its sales and business practices in general during the Covid-19 pandemic.

In South Korea these consequences were reflected in the domestic offline sales for cosmetics and beauty products. As reported by the National Association of Franchise Owners, some cosmetic franchisees in Korea experienced the fall of sales down by 51% due to the change in consumer behavior to digital platforms and e-commerce formats. This in turn forced brands to incur into content creation to remain relevant during the pandemic. (Hong 2020).

Another hit to the K-beauty industry was absorbed by export and duty-free sales which experienced a drop after traveling restrictions suddenly cut off the influx of Chinese and Hong Kong tourists. Some cosmetic giants like AmorePacific Group and AK Industrial saw their revenue cut down by -17% and -11% respectively and operating profits by -73% and -41% respectively in comparison with pre-pandemic times. However, other companies like LG Household and Health Care had record quarter sales in 2021, propelled by the increased consumer needs and wants around household items and beverage goods, brought by people stocking up provisions at home during lockdowns. (Hong 2020).

Consumers changed all kinds of habits in their daily life, including buying behavior towards makeup and cosmetic products. The use of masks, the need to stay at home and avoid close contact with other people greatly affected the way consumers interacted with beauty products leading to the industry becoming stagnant to some extent. (Kim, Kwon 2022).

The massive spread of information and content related to South Korea and what it has to offer helped to propel its stagnant beauty industry around the world during the Covid-19 crisis. These benefits were reaped by certain products like sunscreen and smudge-proof makeup, which rose in popularity and demand for consumers that sought out products that could last under face masks. This type of makeup includes lip-stain products, face powder and makeup fixers whose sales rose by 91%, 89% and 74% respectively in 2021. (Hong 2020).

Online communication promoted the growth of e-commerce and South Korea's leading IT infrastructure became indispensable for the survival of the cosmetic business. This also led to the spread and sharing of Korean culture, media (K-dramas, K-pop, Korean movies, K-fashion, and nail art) and K-beauty with the world. This massive awareness happened mainly through online channels like YouTube, Tik-Tok or Instagram by influencers and content creators. (Kim, Kwon, 2022).

TheJakartaPost

ENTERTAINMENT

K-dramas provide comfort, escapism in a time of pandemic



Jessicha Valentina

The Jakarta Post

Jakarta

Jakarta / Mon, October 5, 2020 / 05:10 pm



Figure 2. Jakarta Post article reporting accounts of people finding comfort in K-dramas during Covid-19 pandemic. (The Jakarta Post 2020)

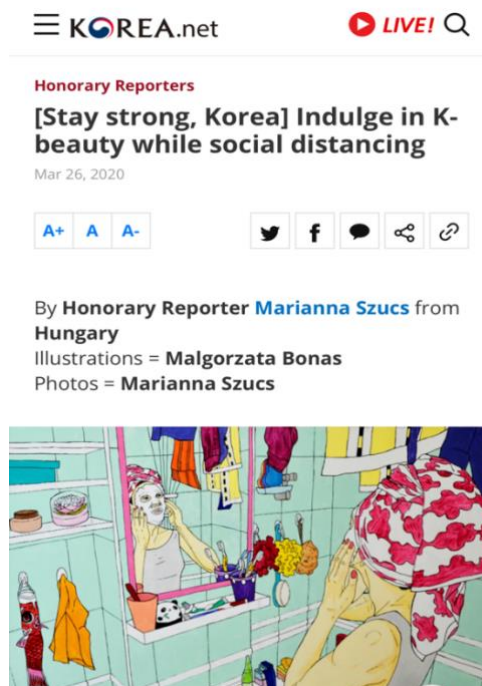


Figure 3. Korea.net article giving readers comfort by sharing K-beauty tips to create self-care routines during the Covid 19 crisis. (Korea.net 2020)



Figure 4. UNESCO article reporting on how K-pop is thriving as an art form and helping people cope with the hardships brought on by the Covid 19 health crisis. (UNESCO 2021)

2.4. New technology and product development in the K-beauty industry

In this chapter the author intends to provide a clear scope of the characteristics of the K-beauty industry including: its constant development in terms of technological advancement and research efforts, done in order to keep innovation as a competitive edge. The purpose of this chapter is to detail facts about the industry that help support the conclusion at the end of this thesis.

According to InvestKorea.org the Korean cosmetics market experienced an increase in its global market share reflected in a compound annual rate of 34.8% since 2014. In 2018, the Asian country became the fifth largest cosmetic product exporter following France, the U.S., Singapore, and Germany. South Korea is experiencing a high growing rate and is expected to become a leader exporter in the world in the next few years. One of the reasons for this advancement can be attributed to Korean cosmetics technology, which is led by product innovation and investment in the development of manufacturing technology by leading and ODM (original development manufacturers) companies such as Kolmar Korea and Cosmax.

K-Beauty is recognized around the world for its development of technology and products in the field of basic cosmetics and sheet mask products. This technology has led to an increase in the production of global and domestic brand products. K-Beauty is acknowledged for its advancements in products such as BB cream and foundation cushion foundation compacts so much so that in 2015 Christian Dior of France sought and signed a partnership with AMOREPACIFIC (the Korean cosmetics giant house to Sulhwasoo, LANEIGE, Etude House, Innisfree, etc) to incorporate its cushion technology into Dior's own designs. (InvestKorea.org 2020).

According to The Korea Times, AmorePacific is the first developer of the cushion compact, the IOPE Air Cushion in 2008. The company currently holds 225 overseas patents and 149 domestic patents on cosmetic designs, selling over 100 million cushion compacts worldwide. Cosmax, another Korean makeup conglomerate has also manufactured cushions for international brands such as Lancôme, Yves Saint Laurent and L'Oreal. (The Korea Times 2023).

Another technological advancement is the Korean cosmetic companies' development of raw materials. Examples of these efforts include SK GROUP's work with cosmetic ingredients, raw materials, and Korean natural extracts to create whitening and wrinkle reduction formulas, AMOREPACIFIC's achievements with Kozo extract, seltinoid, white Chrysanthellum indicum extract as whitening agents, Cosmax's discovery of the world's first microbiome related to aging.

InvestKorea.org reports that hit Korean products such as skin-care products and color cosmetics including CC cream, BB cream foundation cushions and sheet masks, account for more than 50% of K-beauty export items representing K-beauty. This influence has created opportunities for well-established international brands such as Chanel, Dior, and Giorgio Armani to invest in Korean cosmetic technology and test new releases in South Korea.

Finally, the K-beauty industry has also positioned itself as a lead influence in the men's cosmetic market ranking No.1 with a market worth 1.09 billion USD in 2018, attracting brands like Biotherm Homme and SK-II Men to develop and launch their cosmetics in South Korea. (InvestKorea.org 2020).

2.5. The international scope of the K-beauty industry.

To limit the scope of products considered in this study the author intends to provide a clear definition of cosmetics in general and the specific relation to Korean cosmetic products.

The KFDA defines cosmetics as “items or products that can be used by application, rubbing, spraying or other ways to the human body to enhance attractive qualities by cleansing and beautifying the human body, brightening the appearance, or improving the condition of hair and skin, while having mild effects on the subject.” (InvestKorea.org 2020).

According to InvestKorea.org, an institution that conducts and provides analysis and information about different industries in South Korea, cosmetics were legally distinguished from pharmaceuticals following the Cosmetics Act in 1999. This distinction was laid on the basis that a clear therapeutic effect cannot be expected of cosmetics in a short period of time as it is with pharmaceuticals. Nowadays, in Korea there is a classification for functional cosmetics such as hair dye, hair removal, acne, hair loss prevention, hair filler powder and hair removal wax.

Table 4. National production of skincare products by category.

	Year 2014 (million USD)	Year 2015 (million USD)	Year 2016 (million USD)	Year 2017 (million USD)	Year 2018 (million USD)
Lotions and creams	1,626.65	1,913.79	2,283.66	2,224.77	2,766.36
Face masks	454.51	767.80	1,154.35	1,298.38	1,393.14
Oils	872.05	1,000.73	1,148.77	1,101.65	1,340.60
Others	1,290.88	1,485.66	1,734.72	1,733.33	2,308.60
Total	4,244.09	5,167.98	6,321.50	6,348.13	7,808.70

Source: KHIDI

The table above provides data detailing the national production of skincare products by category in South Korea. (InvestKorea.org 2020). The Korean cosmetics industry has been growing since 2010, steadily reaching eighth to ninth place in size within the global market. This specific transformation has developed the industry from a domestic market-oriented to an export -oriented industry since 2010.

The following table illustrates the size of the Korean cosmetics market size and its global market share. The reports by the Korea Health Industry Development Institute show that the Korean cosmetic industry kept a steady growth.

Table 5. South Korea's Cosmetics Market Size Global Market Share elaborated with information from the Korea Health Industry Development Institute. (InvestKorea.org 2020).

(Unit: USD billion, %)

Country name	2015		2016		2017 (E)		2018 (E)	
	Amount	Share	Amount	Share	Amount	Share	Amount	Share
Korea	10.4	3.0	10.9	3.0	11.5	3.0	12.1	2.9

Source: Korea Health Industry Development Institute (2018)

Korea's cosmetics-related industry has grown steadily, with the numbers of cosmetics manufacturers and brand holders increasing every year. The number of manufacturers with production facilities increased at a compound annual rate of 13% in the past five years, reaching 2,367 in August 2019.

Thanks to the continuous expansion in exports and the rapid growth of the domestic market, Korea's cosmetics production increased by more than 14%. In the specific area of K-Beauty, there is a growth based on the development and production of basic cosmetics which has the largest share in the industry at over 56%, followed by color cosmetics and hair products.

According to InvestKorea.org the country's CAGR of cosmetics exports was 35.2% for the past five years, ranking first among the world's major cosmetics-exporting countries. In recent years, exports to the U.S., Europe, and ASEAN regions, as well as China, Hong Kong, and Taiwan, have been a major factor for growth. (Investkorea.org 2020).

2.6. The presence of K-beauty in Mexico and Latin America.

The world-wide expansion experimented by K-beauty has also reached the Latin American market. According to a report made by the Commercial Office of the Korean Embassy in Peru (KOTRA

2020), the total sales of Korean cosmetic products reached 59.7 thousand million US dollars in 2016. It is expected to grow as a stable part of the cosmetic sector in the Latin-American region (2017).

Mexico can be considered a leading Latin American country in consumption of hygiene and beauty products from Korea. Mexico, along with Brazil, leads the list of countries that consume these products the most in the Latin American region; their use reaches 855 USD and 936 USD per capita respectively. In 2018, Mexico imported 8.3 million USD worth of Korean cosmetics and personal hygiene, which is equivalent to 163% of the sum the consumption of Chile, Brazil, and Colombia in the same period (Gaona, Kim 2021).

The Mexican cosmetic industry shares similarities with the Korean industry. From the way people consume products, to the categories of product, to social media marketing trends.

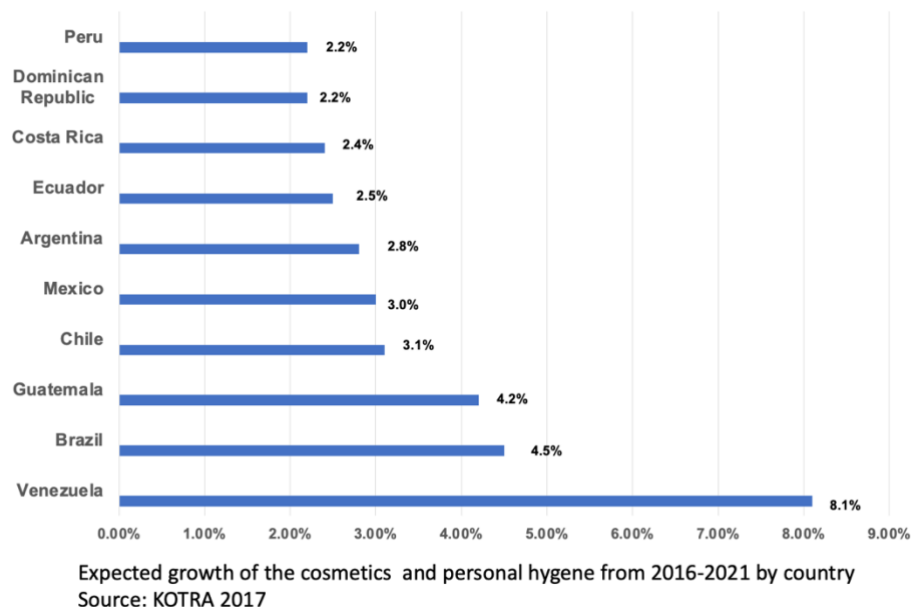


Figure 5. Expected growth of cosmetics and personal hygiene from 2016-2021 by country.

The table above illustrates the forecasted growth in cosmetics and personal hygiene markets from 2016 to 2021 in 10 Latin American countries (KOTRA 2020). Mexico ranked number five with a 2.8% growth in its market, which can make the case that Mexican people care more about their cosmetic and hygiene products more in recent years.

To analyze the Korean cosmetics and personal hygiene trade in this source study, tariff item 330499 (other beauty, make-up, and skin care preparations) was used. The Latin-American countries cited for the analysis by this source were Brazil, Mexico, Colombia, and Chile, these

were chosen according to the number of imports of Korean cosmetics and personal hygiene they had.

Imports of Korean cosmetics and personal hygiene in Latin countries in general have been increasing. The average growth of the four countries from 2014 to 2018 is 79%, especially thanks to the growth of imports from the Mexican market. In 2018, Mexico imported 8.3 million dollars of Korean cosmetics and personal hygiene, which is equivalent to 163% of the combined purchases of Chile, Brazil, and Colombia in the same period. The average growth of Mexico is 74% between the five years, showing a huge potential for the industry.

The Latin American nations that have been more receptive to Korean popular culture, in general, have historical ties to South Korea. The migration of the Korean diaspora to Latin America began as early as 1905 when thousands of Koreans arrived in Mexico as indentured servants. Korean migration to Latin America continued after a few decades as 50 Koreans immigrated to Brazil and 12 to Argentina between 1956 and 1957 (Kim 2006). During the 1960s, the second wave of Korean immigrants arrived in Mexico City and dispersed to Guadalajara, Tijuana, and Puebla (Kim 2006).

The growing visible presence of Korean businesses in Latin America meant a need for better trade relations, which resulted in the strengthening of the Korea–Latin America relationship in the 1990s and into the 2000s. Mexico, Brazil, Argentina, and Panama had significant business investments from Korea. These nations represented 52.1% of the total US\$1.4 billion investment made in the Latin American region by the end of 2001 (Gaona, Kim 2021).

On the other side, there are a few hindrances that these products may face in the Mexican market suggested by the author of this thesis. First, there is no accessibility for facial makeup shades. One of the biggest problems that Mexican consumers find in Korean makeup is the absence of skin color shades that are suitable for darker and brown skin tones. This problem in the era of inclusion only discourages willing customers from purchasing more items. It also creates a feeling of rejection or negativity towards Korean makeup companies and thus, leads to distrust from usually loyal consumers.

Second, lack of information available in Spanish. The amount of existing Korean products and brands is immense, but most of this information is only in Korean or English, making it inaccessible for regular Mexican clients to understand what products they want or even need.

Third, the lack of distributors or local physical shops. In Mexico, to purchase Korean cosmetics, consumers must order from online stores most of the time. Physical stores do exist in Mexico, but they are only a few and are in big cities. Due to this situation, potential customers do not have to

have the money for the product itself but also for shipping and extra fees that may appear when shopping online.

2.7. Mexican cosmetic industry

This subchapter provides a view of both the Mexican cosmetic market. This is to provide facts to obtain a balanced understanding of the two main industries, in which this paper is based on: the Korean cosmetic industry and the Mexican cosmetic industry. Through this chapter the reader can learn more about the Mexican cosmetic market and the possible behaviors that Mexican consumers may display towards K-beauty products.

2.7.1. Market size

As of 2021, the INEGI (National Institute of Geography and Statistics in Mexico) reported in their latest census that the Mexican total population was around 130.3 million inhabitants, 49.3% are males and 50.7% are females. The Mexican population is beginning to age with a median of 28.3 years old, life expectancy is 75.4 years old and less than 50% of the population is younger than 25 years old. Most of the population at 78.8% is centered in urban areas and cities. (ICEX 2022).

According to a market study conducted by the ICEX in 2022, there was a significant rise of imports from 2016-2021 and domestic manufacturing went down. It is suggested that these changes were caused by Mexican industries experiencing a loss of competitiveness next to Asian competitors. This had effects on costs and local productivity which in turn caused higher levels of imports. (ICEX 2022).

Following this data, foreign business supply opportunities in Mexico are based on two different segments: supply targeted to consumers with a medium-low purchasing power and supply targeted to consumers with high purchasing power to whom imports are more relevant. In terms of cosmetics, there are three categories in which products can be grouped: mass produced sector with an influence of 80.9%, the premium sector with 13.6% and the prestige sector representing 5% of the market as shown in the following table. (ICEX 2022).

Table 6. Development of the demand in each category of cosmetic segments from 2016 to 2021.

Cosmetics	2016 million USD	2017 million USD	2018 million USD	2019 million USD	2020 million USD	2021 million USD
Premium	1,138.6	1,374.4	1,381.7	1,414	972.9	1,313
Mass	6,621.3	7,632.8	7,488.4	7,584.7	6,772.2	7,850.5
Prestige	489.8	594.9	589.7	611	410.4	536.8
Total	8,249.9	9,602	9,459.8	9,609.7	8,155.5	9,700.4

Source: ICEX 2022

It can be appreciated in Table 6 above that all three sectors have increased in numbers although they have not reached the same levels, held years before the pandemic. The sector that grew the most in 2021 was the Prestige sector with a 2.5% growth. These products are usually characterized as high-end or high-quality brands.

2.7.2. Imports and Consumer behavior

As mentioned previously the highest most imported cosmetic products in Mexico at the time are those considered premium products. In the year 2021 Mexico's most relevant export was beauty or makeup and care of skin preparations (HS code 3304) which along with perfumes and toilet waters (HS code 3303) amounted to 622 million USD and 1,410 million USD respectively. (ICEX 2022).

According to ICEX Mexico's total imports diminished by 27% in comparison with 2019's numbers after the impact that the covid 19 pandemic had on the world trade. However, there was an increment of 25% in 2021 that almost reached the pre-pandemic levels again.

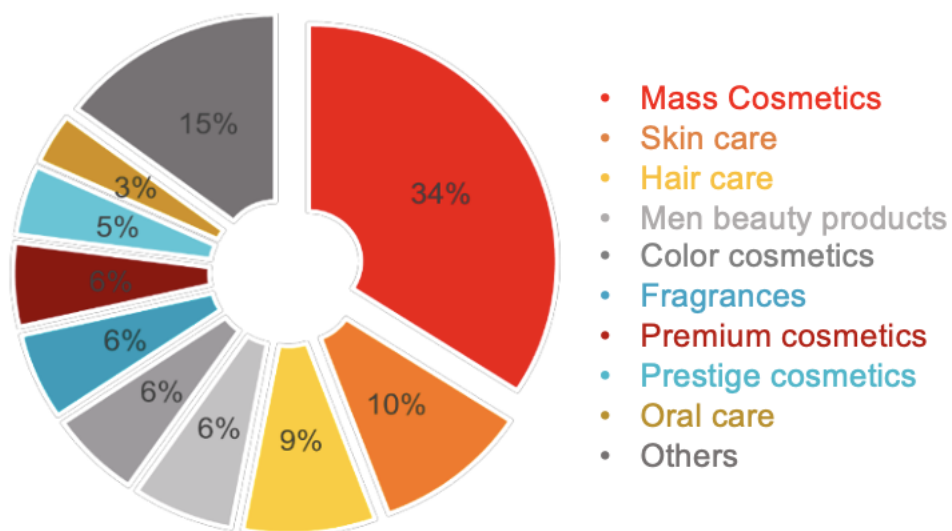
Table 7. Main exporters of HS CODE 3304 beauty products to Mexico in 2021.

HS code 3304	Beauty or make-up and care of skin preparations.
1 EE.UU.	187,657,938 USD
2 France	106,731,954 USD
3 Colombia	60,867,220 USD
4 China	50,768,506 USD
5 Spain	42,840,476 USD

Source: ICEX 2022

The previous table discloses the ranking of main exporter countries for this type of products in 2021. Mexico's cosmetic market reached the 13th ranking worldwide in 2021, making it a thriving industry for foreign interest and development of its market. Mexico's per capita consumption of cosmetic products in 2021 was of 1614.2 mxn pesos (90 USD approx.). The most consumed products among Mexican people are skin care products, capillary products, and mass products respectively.

As Figure below and the previously presented information about the Mexican cosmetic market state suggest, there is a big business opportunity in Mexico for cosmetics, especially for good quality mass and prestige beauty products from foreign origin. It is expected that the demand for premium cosmetics grows in 2024 going back to a similar pre-covid state. (ICEX 2022).



Source: ICEX 2022

Figure 6. Sales percentages of beauty and personal care products in 2021 represented by categories. (ICEX 2022)

In conclusion, the author can suggest that the current state of the Mexican cosmetic industry shows a good space of opportunity for K-beauty in imports and purchasing behavior.

2.8. Marketing Strategies for K-Beauty

According to Chaffey and Ellis-Chadwick (2019, 9), digital marketing can be defined as reaching desired marketing objectives through the application of strategies using digital media, technology, and data. This type of marketing has had different names throughout the years including internet marketing, web marketing, and e-marketing. A main characteristic of digital marketing's purpose is to successfully manage an enterprise's online presence. This can be defined as the company's presence in websites, social media pages, mobile apps, or online communication techniques.

Modern online communication techniques include social media marketing, online advertising, email marketing (newsletters) and search engine marketing (google, bing), these techniques are crucial to the growth and management of an enterprise's online presence. Online presence is mainly built and used in efforts to attract new customers and to develop customer relationship and other CRM activities. To have successful digital marketing strategies it is important to set specific objectives and to measure properly and review the results from the applied strategies, accordingly, thus leading to improved effectiveness. (Chaffey, Ellis-Chadwick 2019).

Digital marketing is effective because it makes it possible for companies to reach the right audience in the right place at the right time. Digital marketing amplifies the outreach in an easier way than regular offline marketing can do. This type of marketing is also effective for businesses because it allows for accountability of results and statistics in real-time. An example of this is how measuring ROI (Return on Investment) is easier with digital marketing compared to offline marketing. (Hubspot 2023).

2.8.1. Search Engine Marketing (SEM)

The following subchapter provides information about Search Engine Marketing (SEM) to establish what it is and why it is important to e-commerce businesses such as K-beauty in Mexico. Search Engine Marketing (SEM) is a technique that enables marketing of a website via search engines. This technique is based on organic search engine optimization and paid search strategies. The term "organic search" means the unpaid, natural rankings that the search engine algorithms determine. These rankings can be optimized with search engine optimization (SEO).

"Paid search" means that a company pays a fee to search engines when their website is displayed on the results page (SERP). This happens when someone online types in specific keywords or phrases into a search engine site. The charged fee is determined usually based on whether the person clicks in the paid advertisement or not. Paid advertising is a good option for companies that do not rank well in search engines' SERP with just an organic search. (Hubspot 2023).

The paid search technique is not the same to SEM, however it is a major part of SEM. This way Search Engine Marketing (SEM) implements the advantages of SEO and paid search to optimize the marketing content to rank higher in SERPs and it appears before a potential user who clicks on the paid advertisement. Paid search can mean pay-per-click (PPC) for specific advertisements. (Rende 2020).

As many of K-beauty distributors in Mexico are e-commerce businesses that rely on online presence and digital marketing it is safe to say that SEM is a viable strategy to attract more customers.

2.8.2. Inbound Marketing

Inbound marketing is a technique used to attract customers by creating valuable content and experiences tailored to them. This type of marketing shows audiences what they are looking for and strives to solve existing problems. Its main difference with outbound marketing is that it does not interrupt the potential consumers with content they do not want or look for. This strategy is used by companies to develop relationships with stakeholders such as customers, prospects, and investors. (Hubspot 2020).

Inbound marketing can be applied in different ways:

- a) Providing solutions aligned with the pain points and goals of the audience so that they are more likely to make a purchase.
- b) Providing help and support to empower the customers to make successful purchases.
- c) Establishing the company as a trusted source that the audience can engage with through good content.

The aforementioned factors become a cycle or a loop that benefits the business. The process of attracting new people starts by creating and publishing valuable content for them. One example is a K-beauty online store having an Instagram account or Youtube channel promoting its products by posting tutorials on how to use certain products or how to recreate looks from K-pop idols or celebrities. Along with this content, it is important to complement it by implementing SEO (Search Engine Optimization) using specific keywords, tags or phrasing related to the company's products or services. In this way, SEO makes it possible for the content and information to appear first or become more visible on search engine sites. (Hubspot 2020).

2.8.3. Social Media Marketing

Another important part of digital marketing is social media marketing. This marketing strategy can be a very effective manner to promote consumer engagement on a company's account, blog, website, or social media platforms such as Instagram, Tik Tok, or Youtube. A main part of social media management is to start and promote discourse with or by consumers. Companies should be actively participating in these conversations about products, promotions, or customer service. Social platforms build spaces for customer relationship in the form of comment sections and direct messages, which are effective ways to learn more about customer needs and improve the company's reputation and public perception. (Chaffey, Ellis-Chadwick 2019).

Instagram is a great example of a social media marketing platform. This site is a very important global platform in which brands and companies (such as K-beauty online stores) advertise products, attract new audiences, create a relationship with their consumers. (Decker 2017).

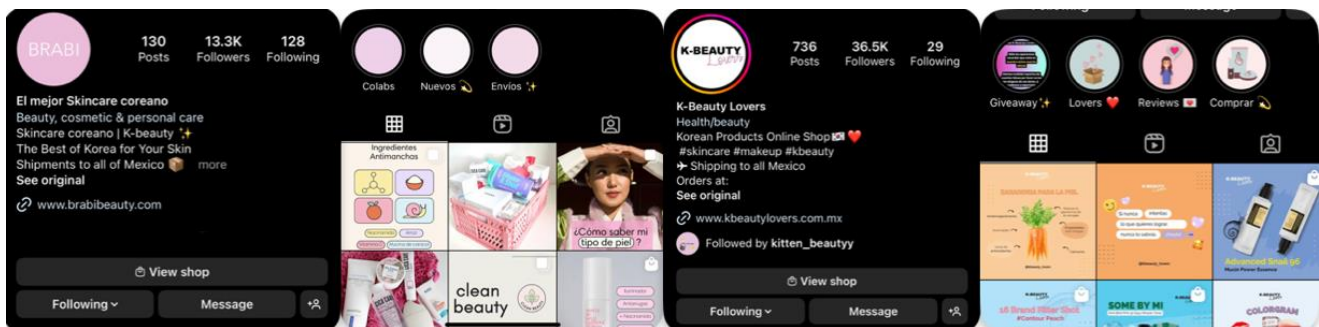


Figure 7. Examples of Instagram being used as a social media marketing strategy by K-beauty stores in Mexico. (Author 2023)

A branch of social media marketing that has developed exponentially in the past ten years is “influencer marketing”. The concept of “Influencer marketing” is about brands or companies collaborating with influencers (individuals with a social media brand and following) to create content or campaigns for endorsement of the company's service and/or products in exchange for financial compensation (in most cases). There are four types of influencers: Mega influencers (1M+ followers), Macro-influencers (100k-1M followers), Micro-influencers (10K-100K influencers), and Nano-influencers (10K followers). (Sheikh 2023).

Working with influencers requires careful planning and demarcation of what demographic is to be targeted to choose which “influencer” is the right fit for the needs of the company and its stakeholders. Influencer marketing has downsides (i.e., tarnishing the brand's image in case of a scandal) as well as advantages but it can bring great engagement and success if the right

collaboration takes place supported by proper research on the influencer and close follow up. The most used platforms for this are Tik Tok, Instagram, Youtube and Snapchat. (Sheikh 2023).

3. Research Methods

3.1. Research Design

The following chapter establishes the chosen research methods selected and projected for this thesis paper. This accounts to the chosen methods, the qualitative research process, detailed primary and secondary data collection methods and reasoning behind them. During this chapter, the author explains why these methods were deemed suitable for the objective of this research and why they are the best to collect the type of data relating to the research topic. Figure 8 shown below illustrates the design used to carry out the research methods for this paper.

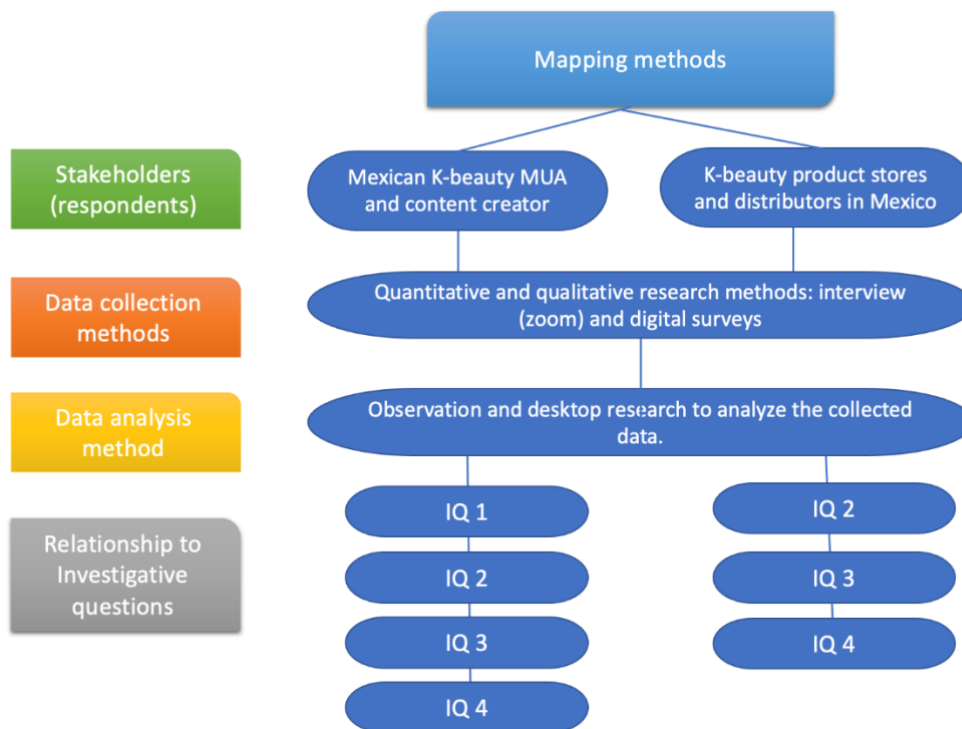


Figure 8. Research design (Author 2023)

3.2. Question Formulation Method

The questions developed for the surveys and interviews were created based on the following concepts on consumer behavior:

The **theory of buyer behavior** argues that purchasing behavior is usually repetitive and tends to adapt routines to be more efficient during the decision-making process. The theory presents that the consumers' chosen brand or product is affected by mediators such as alternatives to the product or accessibility.

This means that companies can fulfill the remaining needs of the consumer by understanding these mediators. According to Ohio University, "a buyer may generalize the experience of purchasing a refrigerator and use that experience to inform the purchase of a new dishwasher." (Ohio University 2022). This theory can help build questions that find information what are the "gaps of opportunity" for the "newer" K-beauty industry to fulfill and cater to in the Mexican market.

The **theory of Reasoned Action** focuses on how the preexisting ideas or concepts in the mind of consumers may influence their purchasing decisions. It explores how the consumer can change their mind and make a different selection from the time their decision to go through with a purchase to the moment the action is finished. (Ohio University 2022).

This theory will help develop questions to get insight on how the consumers associate the purchase of K-beauty with positive or negative concepts or expectations in their selection process. For example, a consumer may believe that by using a specific eyeshadow product they can achieve the same look as their favorite celebrity or Korean online trend.

The **EKB Model or Engel Kollat Blackwell Model** has a four-phase process that details the purchase decision process for consumers: input (when the consumer receives the most marketing input through online advertisements, displays, TV ads, etc.), process information (the combination of that marketing information with past experiences or expectations to make a choice), decision stages and any variables in the process. (Ohio University 2022).

There are five additional phases to the decision process: recognizing a need, collecting information, evaluation of alternatives, purchasing or choosing, and any outcomes after the purchase. (Ohio University 2022). This theory can help formulate questions targeting the purchasing process for Mexican K-beauty consumers and the way they interact with the distributor companies that offer these products.

The **Motivation-Need theory** classifies individuals' actions to satisfy their needs based on a list of five priorities with an increasing level of importance: physiological survival, safety, love, esteem, and self-actualization. This theory has been used to explain why successful sales are impacted by marketing messages crafted specifically to the consumer. This involves appealing to the consumers in a way they find relatable to their needs, which the consumer can find urgent and important. (Ohio University 2022).

Questions based on this theory will help find information from distributors that show how they appeal to the consumers' needs and wants in their marketing and how these strategies work for K-beauty product marketing in Mexico.

Finally, the **Hawkins Stern Impulse Buying** concept focuses on impulse behavior presented by consumers. Stern's argument argues that although rational purchasing decisions lead the average consumer's behavior, the impulse to buy represents one-half of that thought process. It suggests that impulse buying decisions can be inspired by external stimuli like walking past an attractive advertisement that seems convincing and do not hold a big relationship with the consumer's regular decision-making behavior. (Ohio University 2022).

There are four levels to this impulse buying concept. Quick, pure impulse purchase (last-minute decisions), "reminded" impulse purchase (buying through associating products like salt and pepper), suggested impulse purchase (offers or discounts), planned impulse decision (deliberate purchase decision on a specific product while being unaware of the details or specifics. (Ohio University, 2022) Questions based on this theory can target information regarding how packaging of the products affects consumer decision making, the arrangement of the products in-store and other factors that have to do with the consumers' impulse control.

3.3. Data Collection Method

The chosen data collection methods for this thesis are the survey and interview methods. These methods were selected because of their benefits and practicality to collect the necessary data and their accessibility using technology.

Conducting surveys have several advantages for the data collection process. Surveys can be standardized and easy to administer to the potential participants and "(they) allow the collection of significant amounts of data in a systematic, economical, and efficient manner..." (Burns, Veek, Bush 2017). Surveys are also relatively easy to transfer into graphs to analyze data and draw conclusions using technological and digital tools available to the author of this thesis.

Conducting a person-administered interview is also a useful tool for data recollection especially when interviewing an expert in the field relating to the topic and field of the research. It brings a unique and personal approach and allows for more in-depth answers direct from the source. (Burns, Veek, Bush 2017).

Technology plays a part in the practicality of interviews thanks to tools like video conferences and screen-video recording. Another characteristic of the interview conducted for this paper is that the subjects were not limited by gender or age.

Table Research structure (Author 2023)

Investigative Questions (IQs)	Interview/Survey questions	Data Analysis/ Results (chapter)
IQ 1. What are the characteristics of the Mexican cosmetics industry compared to the Korean cosmetics industry?	Interview with K-beauty content creator (My KBeautyBible)	Pg, 35,36 ,37.
IQ 2. What does the Mexican K-beauty consumer look like?	Interview with K-beauty content creator (My KBeautyBible) Survey answered by k-beauty distributors in Mexico	Interview: pg. 36,37. Survey: pg. 39,40,41,42,43,44,46,47
IQ 3. What are the factors that hinder and motivate Mexican consumers from using K-beauty?	Interview with K-beauty content creator (My KBeautyBible) Survey answered by k-beauty distributors in Mexico	Interview: pg 36,37. Survey: pg 40.
IQ 4. What are the product adaptation strategies that Korean makeup brands can use in the Mexican makeup market?	Interview with K-beauty content creator (My KBeautyBible) Survey answered by k-beauty distributors in Mexico	Interview: pg 36, 37. Survey: 47,48

3.4. Approach towards stakeholders

This research relies on the collection of trustworthy information from the participants or stakeholders chosen, which is why the author chose to reach out to reliable people directly involved in the K-beauty business, such as professional makeup artists, content creators with a relevant online presence and established online and traditional distributors of K-beauty products.

The survey created for the research on this paper was conducted to collect first-hand opinions and experiences from businesses that operate with Korean beauty products in Mexico. This survey was applied to K-beauty distributors to collect accurate information about the business cycle regarding their knowledge and first-hand insight of Mexican consumer behavior and habits towards their products. This survey will not be conducted on individual consumers. The subjects are not limited by gender or age, but their names remain undisclosed for privacy purposes.

There are around 30 active and reachable distributors who were contacted by different channels such as company email, Instagram account and business WhatsApp contact number. The interview created and applied for the research on this paper was conducted to collect first-hand opinions and experiences from an experienced make-up artist and influencer involved in the Korean beauty industry in Mexico.



Figure 9. Profile of the interviewee and example of her expertise with K-beauty. (Author 2023)

The interviewee, Mariana Jones or @mykbeautybible is professional makeup designer, who specializes in the adaptation of K-beauty to all facial features, budgets, and needs of people in Latin-America. Her efforts are to help people to be more confident and to break through any limiting beliefs about their approach to beauty. Mariana strives to help and educate people through videos, tips, and masterclasses with the purpose to share the Hallyu movement in a professional and interesting way in collaboration with other makeup professionals, influencers, K-pop idols, artists, etc.

“My Kbeauty Bible” was chosen for the interview due to her expertise in the field of K-beauty and qualifications as a certified Makeup Artist who is applying that knowledge in the Mexican market and the Mexican social media sphere (therefore providing a unique perspective to the data). The author reached out to Mariana Jones with the intention of getting her unique perspective surrounding the adaptation of K-beauty makeup technique to Mexican facial features and made contact through direct messages on Instagram.

4. Results

Throughout the present chapter, the conducted interview, the conducted survey, and their results are explained and analyzed in relation to the other stages of this research process. The author inspects the questions and answers through created figures and text according to each case. This analysis will start with the interview conducted with MyKbeautyBible and then move onto an analysis of the multiple-choice and open-ended questions from the survey answered by the K-beauty stores or distributors who agreed to participate in this project.

4.1. Interview with Mariana Jones or MyKbeautyBible

The first question prepared was, **“What are the main differences between Mexican makeup concepts and K-beauty concepts?”**. Mariana answers this question by listing three fundamentals of K-beauty: “Naturalness” (a focus on enhancing natural beauty), “Less is more” and finally “always looking younger”. She continues by explaining how in K-makeup, tools, technique, and products are focused in these three concepts.

The focus on naturalness and looking younger promote skin care and self-care. Mexican makeup on the other hand tends to follow trends from the U.S.A, it also tends to look “more intense”. Another distinct difference lays in the color scheme used in both styles of makeup. Mexican makeup uses a huge range of color and doesn’t shy away from using bold and bright colors. Korean makeup, however, tends to focus in the “personal color” or colorimetry of the person. There is mention of trends in Korea and how it is part of regular life for people to have professional personal style specialists where they find out which specific colors work well with their skin and undertones as a form of self-improvement.

The second question was, **“What are the main differences between western makeup's impact on consumers and K-beauty?”**. This question was formulated with the intention of finding key reasons why K-beauty consumers feel related to it and chose to adapt it into their regular makeup style. Mariana answered this question by stating that K-beauty is more focused on understanding your natural beauty and using makeup as a tool to feel better instead of “painting on a mask”. Mariana teaches her workshop students to understand their individual facial features and how to work with it to look and feel healthier in your own skin. This makes K-beauty more approachable for people that don’t feel identified with western makeup trends to use their makeup in the way that makes them comfortable and natural for their facial features. K-beauty has a practical use of “looking healthy” so it is perfect for people who prefer looking natural and fresh.

The next question was, **“In what ways can Korean makeup fulfill Mexican consumer needs better than western makeup?”**. This question’s purpose is for K-makeup to identify the areas of opportunity to adapt their products to fulfill the Mexican consumer specific needs that they may not realize yet. Mariana states two points of opportunity that can better the experience with these products. Durability and shade range for different skin tones.

She goes on to explain that although it would be ideal for k-makeup to improve durability it can be tricky to achieve this type of formula without stepping out of the “lightweight” and “dewy” finish that is characteristic of Korean makeup, thus taking away from a core principle of the experience. This is due to finding the right density when formulating the products.

Mariana does state that the lack of shade range is more of a cultural and social hinderance than an issue of materials and formulas in a laboratory, such as “Asian beauty standards” which show preference to pale and fair skin over tan or darker skin. However, there are some Korean brands that are acknowledging the business opportunity brought on by the lack of shade range and are beginning to create products intended for the international consumer (only available online) even if they don’t promote it in South Korea. There is a moderate reach happening from Korean companies to Latin American audiences, but it is happening however slow. Among these is the company Romand who has opened their official store with Aliexpress to be more accessible and stop depending on resellers in Mexico to promote their products. Some other examples include Peripera and Clio.

The fourth question is, **“How would you describe the average K-beauty consumer?”** This question intends to build a “buyer persona” based on Mariana’s professional experience with Mexican people who consume K-beauty. Mariana describes this person as 19-25 years old, with purchasing power, interest in Hallyu and a liking for natural-looking makeup.

The next question is, “According to your experience with your followers and people that engage with your content, what are the people’s main needs when they try k-beauty?” Mariana responds that her followers tend to like cosmetic products with good formulas that feel light and have a pretty finish, they also like eyeshadow, lip tints and glitters. Her followers like to have content in the form of tutorials and informative videos so they can learn how to recreate makeup looks.

The sixth question is, **“What are the most and least popular products among your followers?”** She states that most people don’t seem too interested in products like tools such as brushes, sponges, or spatulas since they already have trusted western brands available in Mexico to fulfill those needs. This can suggest that people really have an interest in Korean products because they

think of them as “different” or “special” and irreplaceable unless there is a more accessible western counterpart.

The next question, “**Are K-beauty consumers very reliant on influencers and social media to learn about K-beauty? Why do you think this is?**” is formulated to understand how much weight influencer marketing has on the K-beauty market in Mexico. Mariana confirms the author’s suspicion and states that there is, in fact, a “really high” dependency on content creators and influencers from their audience. Consumers see these creators as their main source of information surrounding K-beauty. She continues to say that there are currently not a lot of people that are taking on the task to really convey the principles and key concepts of K-makeup in the media, which is why she has a desire to share her knowledge and abilities with her followers.

The final question of the interview is, “**What do you think are the main reasons that may discourage people from trying or using K-makeup?**” and “**What type of changes do you think Korean companies can do to appeal to the Mexican consumer without sacrificing the essence of K-beauty?**”. The answer includes some of the issues mentioned before during the interview like durability and not knowing how to adapt the Korean makeup styles. However, the main and most urgent changes to be made are the lack of shades for diverse skin tones and the lack of accessibility created by the language barrier since there are lots of products that are sold without English or Spanish instructions for users and only have them in Korean language. Mariana comments that although there are translation digital tools not every user is willing to use them and feeling that barrier may be enough to deter some people from trying the products. This problem is also extended to video content teaching how to use products since it becomes hard to understand without correct subtitles. Mariana suggests that to combat this, companies should pair up and collaborate with influencers and content creators that may breach that barrier and become a bridge for the Mexican audiences to feel included.

4.2. K-beauty distributor survey

The first question in the survey involved obtaining basic information about the participants. This data will not be disclosed to maintain the privacy of the businesses that completed the survey. The second question was to get a proper scope of the size of the companies that distribute Korean beauty products and the type of companies that were willing to participate in this survey.

2. Size of the company

Number of respondents: 5

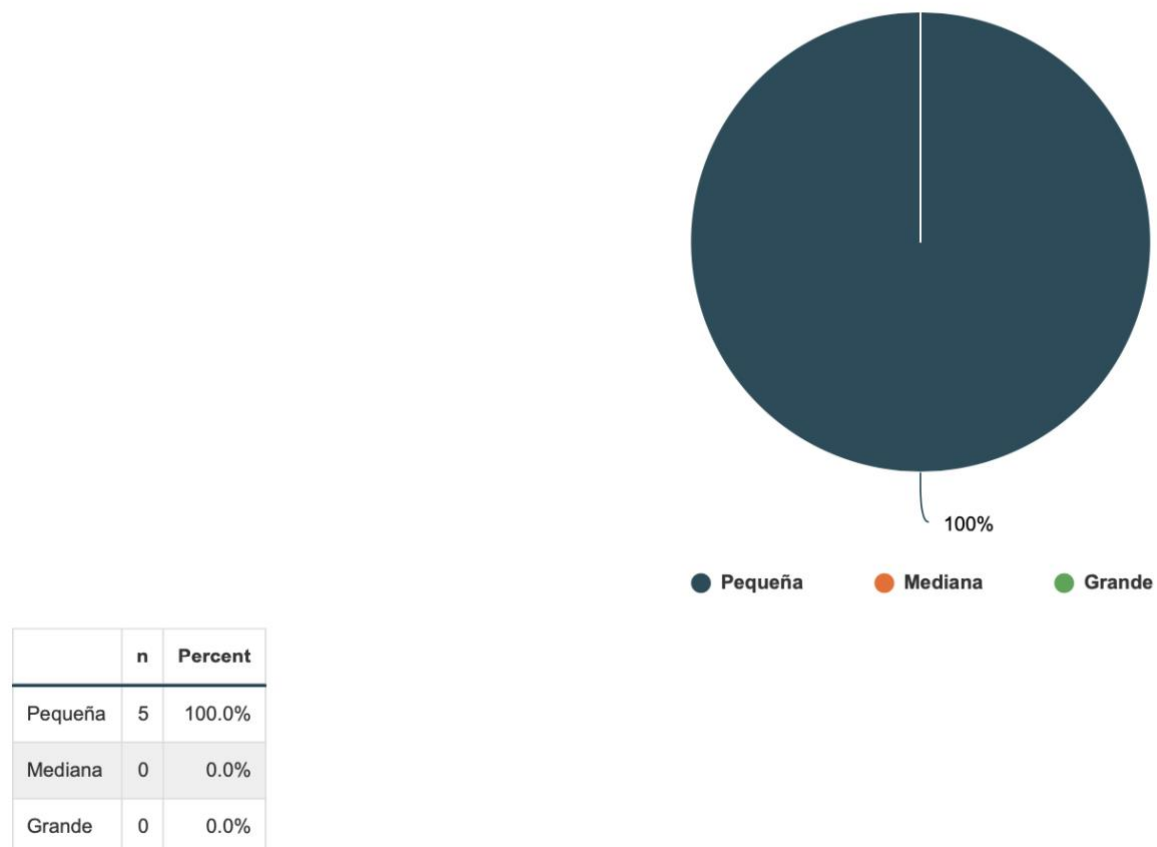
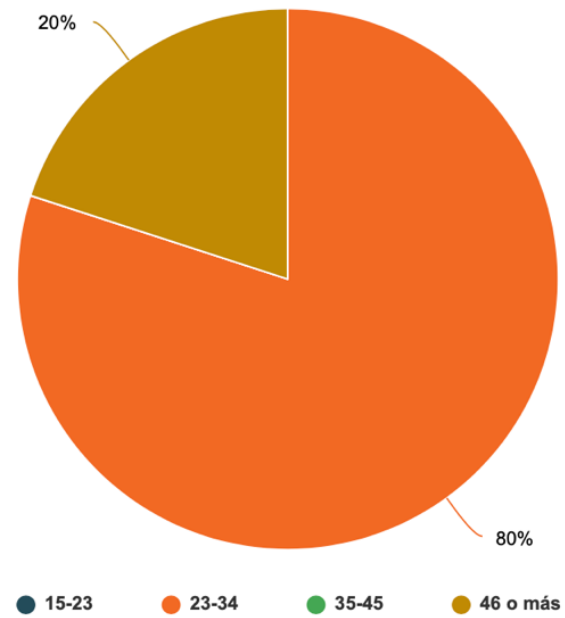


Figure 10. Question no.2 K-beauty product distributors in Mexico (Author 2023)

The figure above shows that all the participants were small sized stores. During the process of contacting potential participants companies of all sizes were sent links and invitations to participate, some of them didn't reply and other were unable to participate due to privacy reasons.

3. Approximate age of consumers

Number of respondents: 5



	n	Percent
15-23	0	0.0%
23-34	4	80.0%
35-45	0	0.0%
46 o más	1	20.0%

Figure 11. Question no.3 K-beauty product distributors in Mexico (Author 2023)

The figure above shows that 80% of participants identified their clients in the 23–34-year-old age range and only 20% identified a client in the 46 year old to older age range.

4. What do you consider to be the main shared interest of your consumers to try K-beauty?
1 is the most important and 7 is the least important

Number of respondents: 5

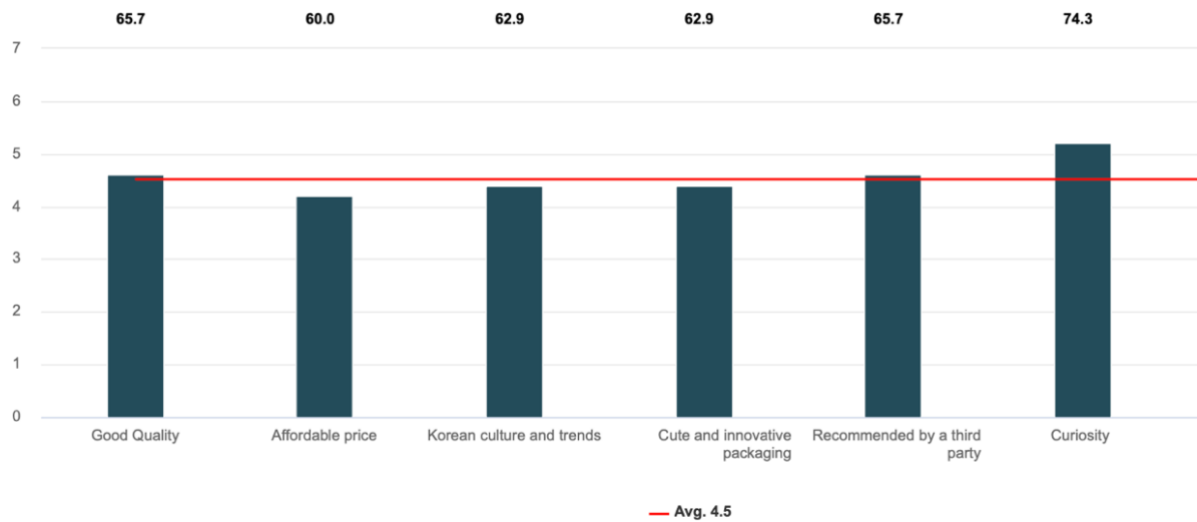


Figure 12. Question no.4 K-beauty product distributors in Mexico (Author 2023)

The figure above shows that there is an equally shared rate of interest among quality, price, Korean culture, packaging and being recommended by someone else. The only variable that is slightly lower (a score of 7 represents “least” important) among consumers is curiosity. This suggests that most consumers of the participating distributors are almost equally inclined to try or investigate K-beauty because of its good reputation and special features involving Korean culture.

5. What gender is the most present among your customers?

Number of respondents: 5

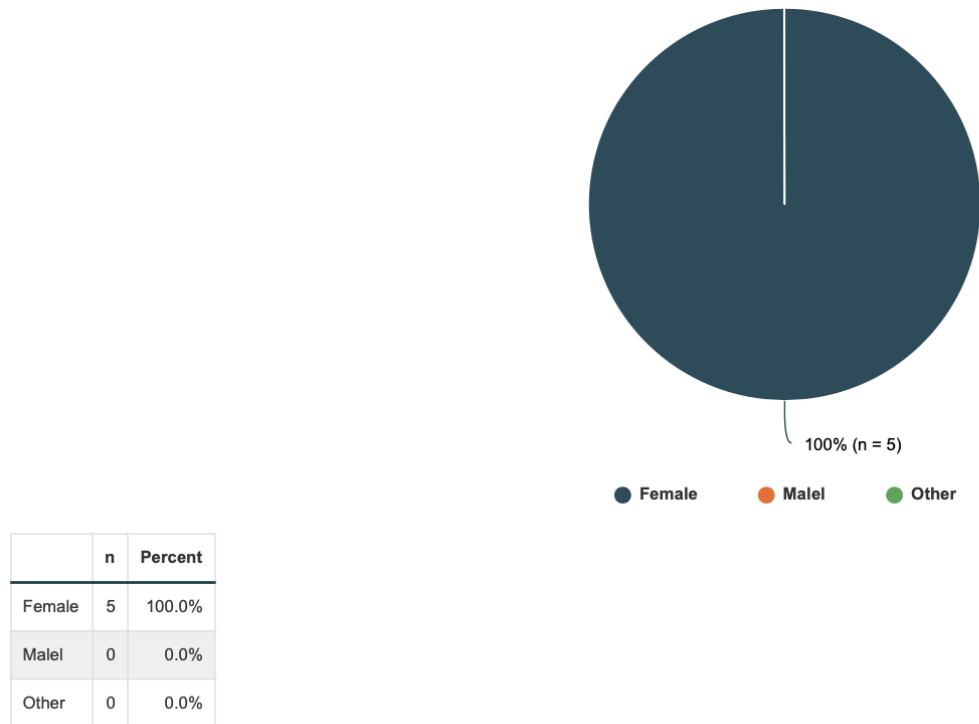


Figure 13. Question no.5 K-beauty product distributors in Mexico (Author 2023)

This figure shows that most of the participants' clients are female. This data also aligns with the information collected from the interview conducted with My KBeauty Bible who also concluded that most of the people that engage with her content to learn about K-beauty are female.

6. What is the most sought after product category in your store?

1 as the most popular and 5 as the least popular

Number of respondents: 5

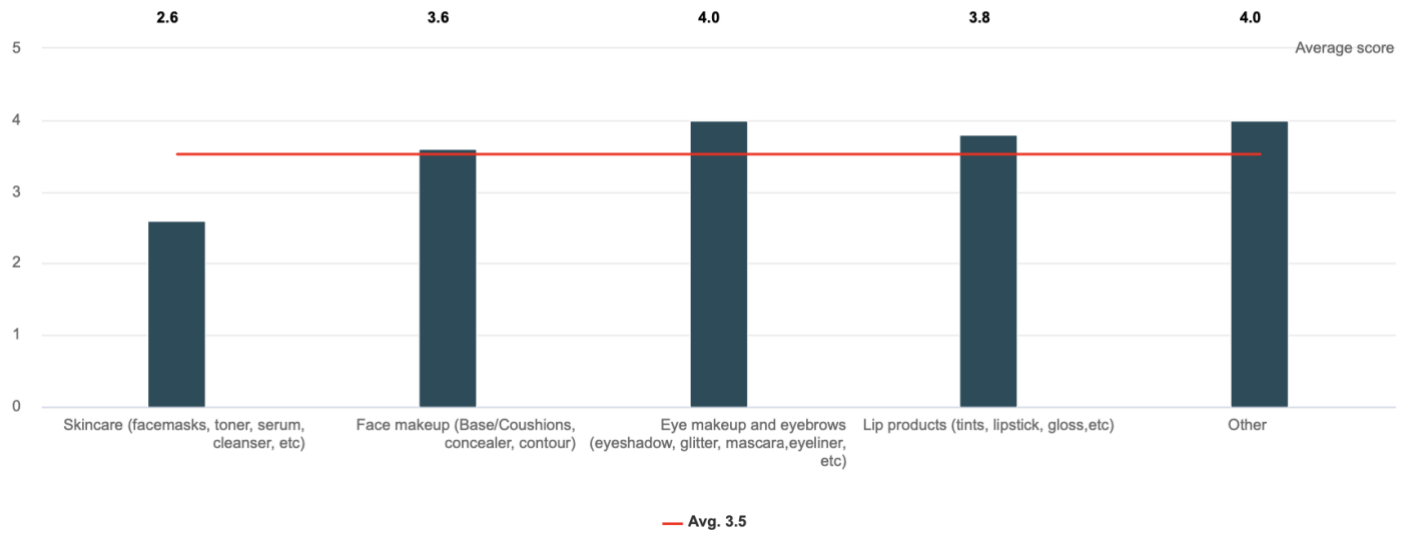


Figure 14. Question no.6 K-beauty product distributors in Mexico (Author 2023)

This figure shows that products seem to be close in popularity. The results are led by skincare, then face makeup, then other (stated as tools like brushes or sponges) and eye makeup tied together as least popular). It is to be noted that the products are still quite close in score to each other.

7. What is your company's main marketing channel?

Number of respondents: 5 , selected answers: 15

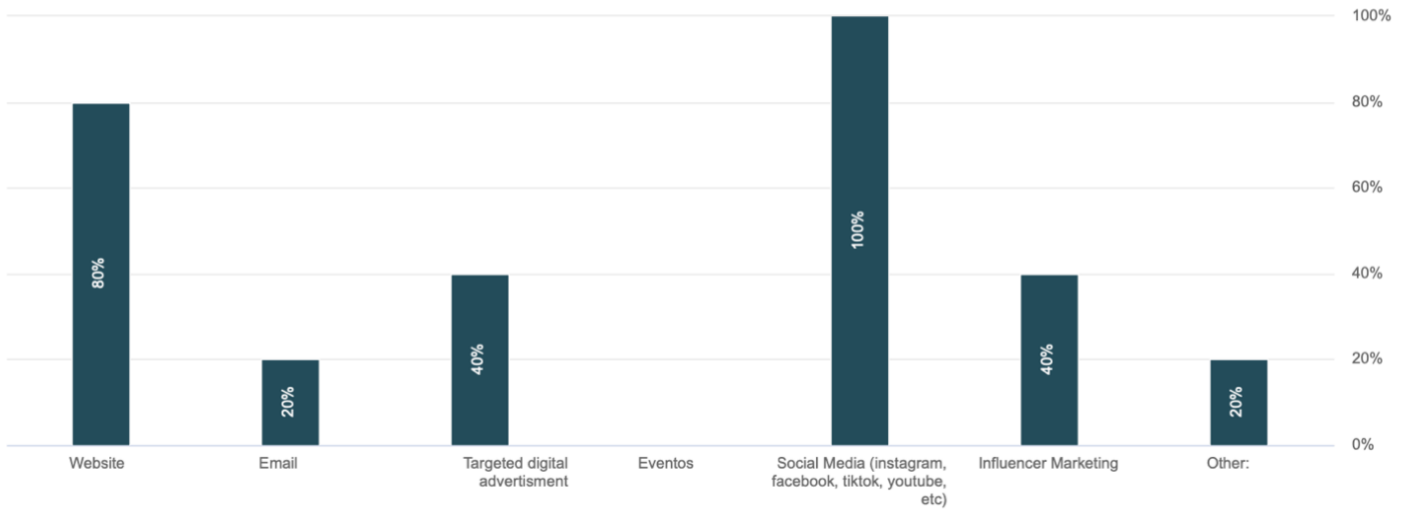


Figure 15. Question no.7 K-beauty product distributors in Mexico (Author 2023)

This figure displays that social media marketing is the most effective marketing strategy for these companies' promotion so far. This reaffirms the data obtained through the interview conducted with KBeauty Bible in which it was also stated that social media marketing is crucial for the interaction of consumers with K-beauty. The second most effective channel is through their website.

8. Which marketing chanel gets the least amount of engagement?

Number of respondents: 5

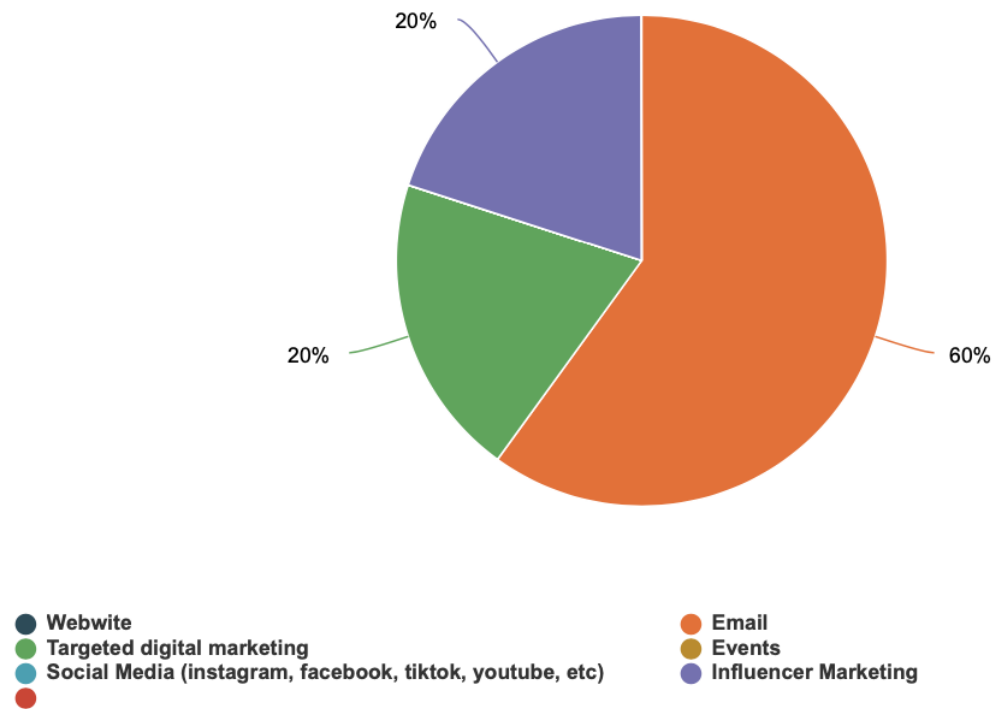


Figure 16. Question no.8 K-beauty product distributors in Mexico (Author 2023)

The pie chart in Figure 16 illustrates how the participants consider their least useful channel to create engagement with their audience is by email, followed by targeted digital marketing and influencer marketing. It is also observable that events do not have a relevant presence in the pie chart at all.

9. Which type of sales chanel does you store have?

Number of respondents: 5 , selected answers: 6



	n	Percent
On-line/E-commerce	5	100.0%
Physical store	1	20.0%
Other:	0	0.0%

Figure 17. Question no.9 K-beauty product distributors in Mexico (Author 2023)

This figure suggests that most of these stores are e-commerce businesses. This fact solidifies the observation that most of K-beauty's business happens online, from engaging with potential clients to the content that consumers depend on.

10. What is the store's most successful sales chanel?

Number of respondents: 5

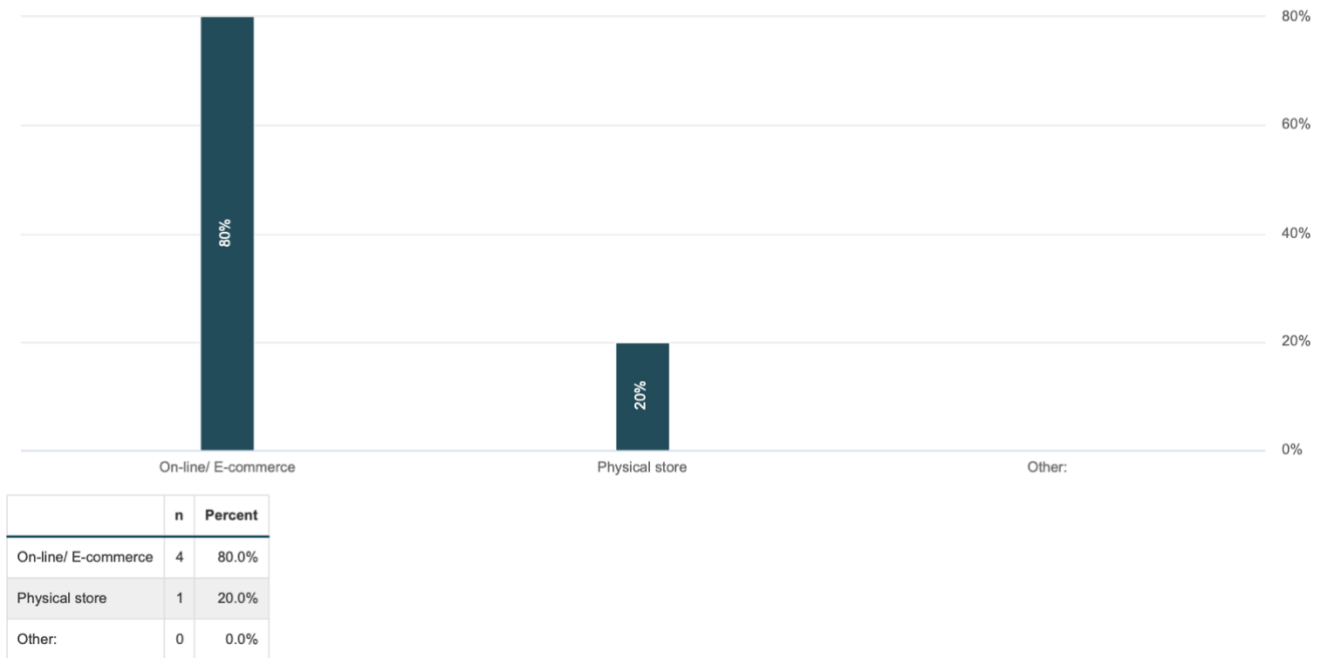
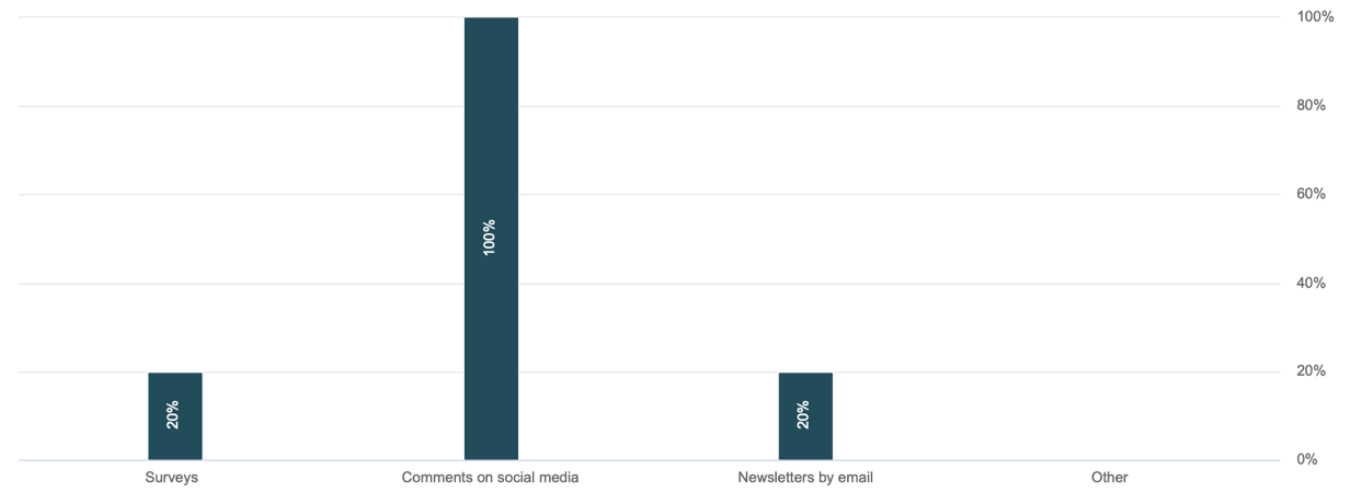


Figure 18. Question no.10 K-beauty product distributors in Mexico (Author 2023)

This figure suggests that as most of the stores are e-commerce that is their main channel of sales and distribution. This fact reflects on how most of these distributors have delivery systems in place for their products.

11. What tools do you use to recognize the needs of your customer?

Number of respondents: 5 , selected answers: 7



	n	Percent
Surveys	1	20.0%
Comments on social media	5	100.0%
Newsletters by email	1	20.0%
Other	0	0.0%

Figure 19. Question no.11 K-beauty product distributors in Mexico (Author 2023)

Most of the distributors get insight on their clients' needs through comments on their social media pages as shown in the figure above. This confirms the data obtained through the interview conducted with KBeauty Bible in which it was also discussed how K-beauty consumers communicate their needs through comments and direct messages.

12. What do you focus on to tailor your marketing strategy to your audience?

Number of respondents: 5 , selected answers: 9

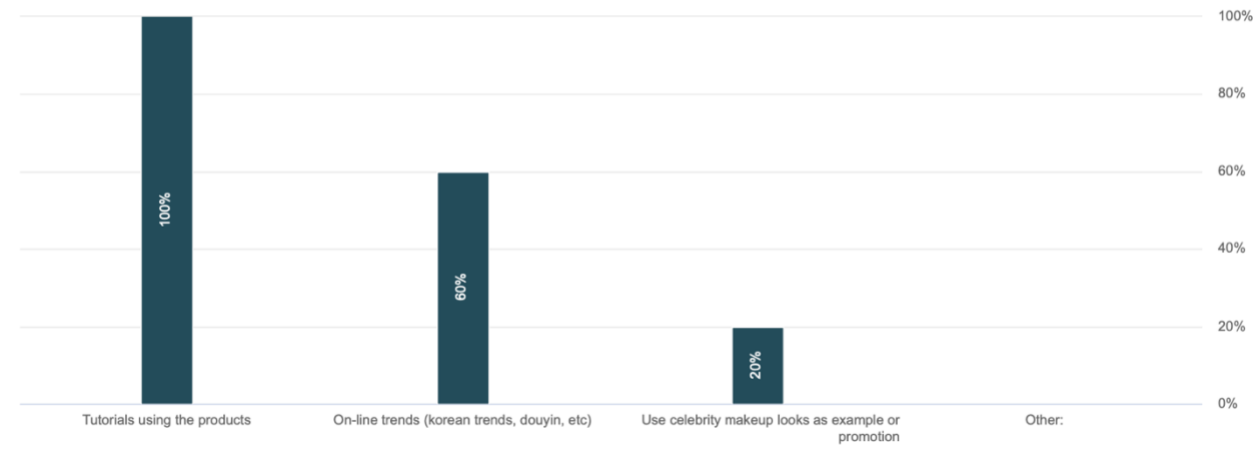


Figure 20. Question no.12 K-beauty product distributors in Mexico (Author 2023)

Figure 20 suggests that most distributors chose to create promotional content focused on showing tutorials and teaching their audience how to use their products.

Question no.13 was an open-ended question, so it is not represented by a figure in this paper. The question was, “In your company’s experience with customer service, what is the main obstacle/inconformity for your Mexican clients regarding K-beauty products or trends?”

There were 4 main answers given by the participants: Not knowing how to identify the main focus of K-beauty, the clients compare Korean products’ price with Chinese products without taking into account the quality of the first, the share range for skin tones is very limited and oriented towards whitening the skin, products like foundation and concealer are hard to adapt to Mexican skin, clients aren’t used to the “dewy effect” of Korean makeup because Mexican cosmetics focus more on a mattifying effect and finally the lack of commitment to using the products.

5. Conclusions

In this final chapter, the author examines the key findings obtained throughout the investigation. Being mindful of the importance of reliable sources and data, the author selected and contacted fitting candidates to the extent of their possibilities after carefully considering their profiles and qualifications.

5.1. Discussion

In this subchapter the author discusses the valuable and useful insight provided by the interviewee and the K-beauty product distributors along the data collection process. The author of this thesis analyzes the information obtained with the objective of answering the four investigative questions (IQ) defined at the beginning of this paper and the research question (RQ). The next paragraphs will reflect the final statements surrounding this research project and the author's conclusions regarding K-beauty's footing in the Mexican cosmetics market.

Thanks to the background information provided in the theoretical part of this paper and the result of the interview with makeup artist Mariana Jones the author can answer the first IQ, **“What are the characteristics of the Mexican cosmetics industry compared to the Korean cosmetics industry?”** by identifying important factors that point out the differences between both industries. These factors include key beauty ideas and concepts that are almost opposite; Korean beauty focuses on naturalness, looking healthy and dewy and using natural colors to enhance beauty, Mexican beauty trends often mirror beauty trends in U.S.A and lean towards a more saturated range of color and matte finish that let you create who you want to be that day.

Another difference in the cosmetic market of these two countries is the constant development of technology and innovation in its manufacturing of raw materials. South Korea has positioned its beauty industry in the global stage and continues to pursue a leading position among cosmetic technology and use of raw materials.

On the other hand, the production sector of the Mexican industry is quite stagnant making imports the main economic activities in the cosmetic market. This shows that Mexico's importing and consuming behavior make a great pot of opportunities for Korean beauty companies, not to mention South Korea's advantage after the popularization of its culture and entertainment that appeals to all audiences around the world as cited in this paper.

Following that train of thought the author moves on to Investigative Question 2, **“What are the factors that hinder and motivate Mexican consumers from using K-makeup?”**. As mentioned before South Korea is experiencing a surge or popularity due to its culture exports, k-drama, k-pop, k-fashion, and K-beauty, which has led many young people around the world to follow their curiosity and explore the world of Korean beauty and skin care.

As it was stated by the survey answers and interview, there are several attractive points to Mexican consumers of K-beauty, among these are the interest in other makeup concepts and ideas besides the traditional ones, the beautiful packaging and high quality formulas that Korean skincare and makeup are known for and the influence that Korean entertainment has had in the past few years leading curious people to try the products that their favorite Korean celebrity is promoting.

The hinderances that consumers face when using K-beauty were clearly stated in both the interview with content creator Mariana/My K-Beauty Bible and the surveys answered by Korean beauty product distributors: lack of shade range in facial makeup products with color and language barriers that don't allow non-Korean speaking Mexican consumers learn more freely and understand their own products. These issues can lead Mexican consumers to feel left out and frustrated with Korean cosmetic companies that are just slowly but surely beginning to pay attention to the huge business opportunity that the Mexican and Latin American audiences represent.

Answering the third IQ, **“What does the Mexican K-makeup consumer look like?”** is quite easy going off the information obtained through the data collection process. The average K-beauty consumer in Mexico is 19 to 35 years old on average, processes purchasing power to carry the costs of retail prices for the Korean imported beauty products, is usually female and has interest in Korean culture and trying out a different way of experiencing makeup.

To answer the fourth and final Investigative Question, **“What are the product adaptation strategies that Korean makeup brands can adapt to enter Mexican makeup market?”** the author considers all the information gathered through this paper, theory, and data collection.

As mentioned in the previous paragraphs the Mexican consumer wants to try the products that Korean companies have to offer but it is imperative that they construct business plans that consider the different needs that their new audience is vocalizing.

Korean companies need to be more proactive to fulfill the need for inclusive range of makeup shades and make the ecosystem around their products more accessible for Spanish speaking consumers, this includes labeling, tutorials on how to use the products, subtitles available in multimedia and partnering with K-beauty content creators and makeup artists to create successful marketing promotion that can reach not only already existing consumers but potential customers in the Mexican community.

After answering all four investigative questions the author is ready to provide the final conclusions to the Research Question stated at the beginning of this paper, **“What are the opportunities for Korean makeup to enter the Mexican beauty market?”**.

The process of writing this thesis allows the author to learn and dive deep into this topic, the desktop research led the author to not only find new knowledge about the Korean cosmetic industry, but also previously unknown things about its Mexican counterpart. The author makes use of Porter’s five forces to analyze the real opportunities for K-beauty to penetrate the Mexican cosmetic market.

Potential of new entrants and competition in the industry: As previously stated, the national innovation and domestic production of cosmetics in Mexico is somewhat stagnant, especially after the covid-19 pandemic, however the real business opportunity appears in Mexico’s imports are based on one group of products (HS code 3304), beauty, makeup, and facial care products.

The most consumed products among Mexican people are skin care products, capillary products, and mass products respectively, which perfectly align with the type of products K-beauty can offer. However, there are other countries that also have an interest in the Mexican market such as U.S.A., France, China, Colombia, and Spain. These are strong competitors that are already established in Mexico and worldwide.

Power of suppliers: Although K-beauty companies were not exempt of the effects of the covid 19 pandemic, as stated in this paper, the industry is recovering and growing stronger each day thanks to the rise in popularity of Hallyu and Asian culture in recent years. This combined with Korean companies’ continuous development of new technologies and IT innovation suggests that K-beauty can afford venturing into the Mexican cosmetic market and Latin American market.

Power of customers: As mentioned previously in subchapter 2.7, Mexico’s cosmetic market reached the 13th ranking worldwide in 2021, making it a thriving industry for foreign interest and

development of its market. The country's per capita consumption of cosmetic products in 2021 was of 1614.2 mxn pesos (90 USD approx.). This proves that Mexican consumers have the purchasing power to be invested into a good quality an innovative range of products like Korean cosmetics.

Threat of substitutes: Although K-beauty is the leader when it comes to popularity of Asian cosmetics there are other countries who can represent a threat of substitution for K-beauty, such as China, Singapore, and Japan. As mentioned in the survey results some distributors also regard Chinese products as possible deterrent factors for clients to not follow through with their purchases of K-beauty products. However, K-beauty has many solid selling points and the strong cultural power of Hallyu as a backbone to strengthen the popularity of beauty products and persuade consumers.

Finally, the author of this paper concludes that there are many commercial opportunities for the K-beauty industry in the Mexican cosmetic market. The Mexican market presents the right environment for foreign brands seeking to appeal to Mexican audiences. The interested companies and stakeholders must carry out proper market research and studies to learn what are the specific needs of current and new customers in Mexico. Another recommendation to be made to these companies is to strive to work with the correct digital media strategies (SEM marketing, social media marketing, and inbound marketing) alongside makeup artists and content creators that specialize in K-beauty for latino audiences, in order to get the right insight that can help them gain the trust and loyalty of potential and existing clients. This thesis concludes that there is great potential for the K-beauty industry in the Mexican cosmetic market.

Appreciations

This body of work represents the culmination of all the dreams, hopes, fears and growth I experienced throughout my time in university. It is the mixture of the knowledge I acquired during college and the passion I hold for Korean culture, and seeing it being brought to life as the final wrap to my student experience equally brings me nostalgia and great joy.

It is with great pleasure that I, the author of this thesis, dedicate my work and extend all my gratitude to my mother, Maria del Carmen Delgado Cruz who has supported me, nourished me, taught me, and walked with me through my life, and without whom I would not be the person I am today. Thank you for being patient and outstanding in every way, being my first example of professionalism and academic excellence and sowing solid ground for me to grow in every step of the way.

It is because you never gave up on me, even when I gave up on myself, that I am where I am today and was able to come out at the end of this four-year long process with my head held up high. It is because of you that I developed the skills necessary to complete this project and it is thanks to you that I have the life experience to support it. I want to thank you for every day and night, every prayer, and every piece of advice because this would not be possible without you. Thank you, Mom.

I want to extend my deepest appreciation to Gyeonghun Ahn who has supported me and encouraged me throughout this whole process, giving me reassurance and words of encouragement whenever I needed them. Thank you for being such a strong and immensely admirable person, an example of passion, drive and work ethic, someone I can look up to and with whom I find comfort and endless joy. Thanks to you I find happiness I never knew before; you make me want to be a better person and lead a healthy and passionate life together.

To my beloved friend Nara Bask, who always has a kind word and powerful advice to make me see myself like other see me, thank you, your friendship means the world to me and keeps me going to become the woman I know you see in me. You inspire me every day.

To my dear friends and classmates, I want to extend my gratitude for all the time, tears, and moments we shared along the last four years. Although we had an unconventional college experience we remained as a source of encouragement for each other despite international lines and being in different continents at times. Thank you for being great people and sharing this ride

with me. The things I learned from you I will cherish throughout my life and professional endeavors. Thank you for every moment we spent together and for being such a source of strength and help in this thesis project.

I would like to specially mention Miss Elena who was the first one to formally teach me Korean language and nurture my love for South Korea and its culture, your support and encouragement along the way was key to me following my dreams and continuing to work hard to get to where I am. Thank you for believing in me.

I want to thank every group and artist that inspired me to be passionate about Korean culture and gave me strength with their music and work. We are one.

Finally, I want to express my sincere gratitude to all those who have been there for me along the way, my friends, Mariana (My KBeauty Bible) and the stores who participated in the survey, thank you for lending me your insight of the industry, your help allowed me to support my research with first-hand information and conclude my project successfully.

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Appendix

Appendix 1. Research Tool: Survey



Haaga-Helia
Marketing para Tiendas de K-beauty en Mexico

1. Nombre de la compañía/ Name of the company (no es obligatorio)

2. Tamaño de la compañía

Pequeña

Mediana

Grande

3. Edad aproximada de sus consumidores:

15-23

23-34

35-45

46 o más

4. ¿Cuál consideras que es el interés principal de tus clientes al probar K-beauty? 1 es el MAS importante y 7 el MENOS relevante.

	1	2	3	4	5	6	7
Buena calidad	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Precio accesible	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cultura y tendencias coreanas	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Empaques bonitos y vanguardistas	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Recomendación por una tercera persona	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Curiosidad	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Otro	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

5. ¿Cuál es el género de la mayoría de sus consumidores?

Femenino

Masculino

Otro

6. ¿Cuál es/son los productos más populares en su tienda? 1 es el MAS popular y 5 el MENOS popular.

	1	2	3	4	5
Skincare (mascarillas, toner, serum, cleanser, etc)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Maquillaje para rostro (Base/Cushions, corrector, contour)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Maquillaje de ojos y cejas (Sombras de ojos, glitter para ojos, mascara, delineador, etc)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Productos para labios (tintas, labial, gloss, etc)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Otro	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

7. ¿Cuál es el canal de marketing principal de la compañía?

Página web

Email

Publicidad digital

Eventos

Redes Sociales (Instagram, facebook, tiktok, youtube, etc)

Marketing con influencers

Otro: _____

8. ¿Cuál es el canal de marketing que tiene menos respuesta/engagement?

Página web

Email

Publicidad digital

Eventos

Redes Sociales (Instagram, facebook, tiktok, youtube, etc)

Marketing con influencers

Otro: _____

9. ¿Con que medios de venta cuenta la tienda?

En línea/ E-commerce

Tienda física

Otro: _____

10. ¿Por cuál medio de venta tiene más éxito la tienda?

En línea/ E-commerce

Tienda física

Otro: _____

11. ¿Qué herramientas usan para conocer las necesidades o deseos de sus clientes?

Encuestas

Comentarios en línea/redes sociales

Newsletters por email

Otro: _____

12. ¿En que se enfocan para personalizar su estrategia de marketing a su audiencia?

Tutoriales usando los productos

Tendencias de tiktok (korean trends, douyin, etc)

Usan looks de maquillaje de celebridades coreanas como ejemplo

Otro: _____

13. En su experiencia con servicio al cliente, ¿Cuál es el obstáculo/inconformidad principal de los clientes mexicanos con los productos o tendencias de K-beauty?

Muchas gracias por tu participación en esta encuesta. Ten un bonito día. ^^

Figure 21. Screenshots of the full survey. (Author 2023)

Appendix 2 Research Tool: Interview

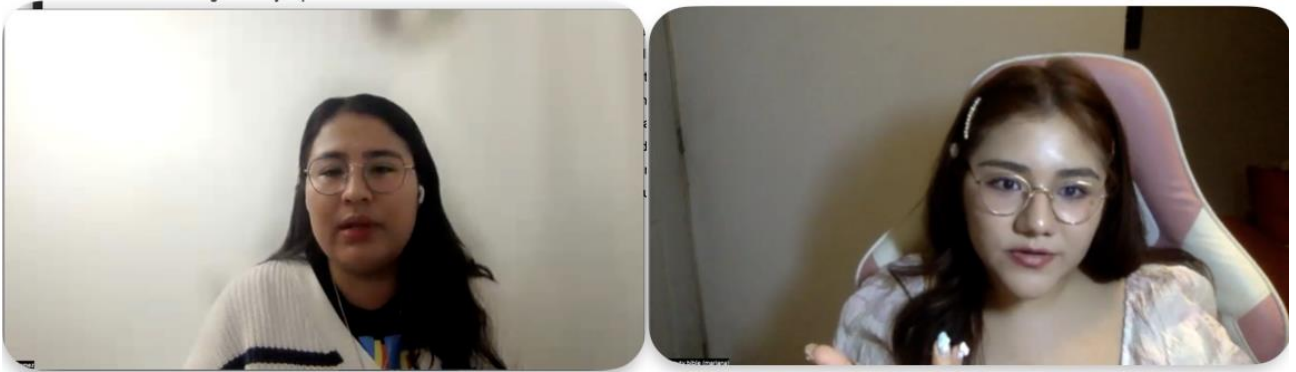


Figure 22. Screenshot of the virtual interview with My KbeautyBible. (Author 2023)