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BIBLIOGRAPHIC STUDY

BRAND DYNAMICS AND CONSUMER TRENDS IN THE COSMETICS MARKET: *FROM THE MARKETING MIX TO COHERENCE BETWEEN PROMISE AND DELIVERY*

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ABSTRACT

Introduction: the Brazilian cosmetics market is growing amid a wide variety of brands and a strong presence of digital content, which makes differentiation harder. **Objective:** to analyze the challenges companies in the sector face to stand out and to discuss how visibility, credibility and loyalty relate to one another. **Methods:** qualitative, exploratory and descriptive bibliographic research, searching Google Scholar; market sources were used only as context. **Results:** the trajectory of the marketing mix, from the 4Ps to Marketing 4.0, shifts the focus from the company to consumer trust; influencers and exposure are associated with acceptance, generally through credibility, and excess supply harms choice only under specific conditions. **Conclusion:** visibility, credibility and loyalty are distinct outcomes, linked by coherence between promise and delivery; evidence specific to cosmetics remains scarce.

1 INTRODUCTION

The cosmetics market is among those that best combine growth and competition. An IPC Maps projection estimates that Brazilians will spend about R$258.8 billion on personal hygiene and beauty in 2026, 6.8% more than the previous year (Rocha, 2026). The dynamism, however, is not evenly distributed: the consultancy Circana, in data released by the specialized press, records 10% growth in premium beauty in the first quarter of 2026 and 6% in the first half, a pace below that of the opening quarter (Féria, 2026; Redação Central do Varejo, 2026). These are contextual figures, not scientific evidence, and it is as context that they will be treated in this text.

This growth coexists with abundant supply. New brands emerge continuously, launches follow one another, and consumers have the means to compare prices, examine ingredients and consult reviews before

buying. The purchase journey now takes place across multiple touchpoints, many of them digital (Lemon & Verhoef, 2016), and consumers have become more connected and better informed (Kotler et al., 2017). Connectivity broadens access to information, but the volume of content can make the decision more laborious and reduce the perceived difference among offers.

In this environment, product quality alone may not be enough to sustain differentiation. Positioning, communication and brand building gain weight, including through influencers, whose own brands already account for about 25% of makeup sales in the segment analyzed by Circana (Féria, 2026). The underlying question is both managerial and theoretical: why are some brands able to be seen, under what conditions does visibility convert into trust and decision, and what makes the consumer stay?

To answer this question, the marketing literature offers a conceptual trajectory of its own: from the company-centered marketing mix (McCarthy, 1960), through its reinterpretation from the consumer's viewpoint (Lauterborn, 1990) and the notion of brand equity (Keller, 1993), to marketing in the digital environment (Kotler et al., 2017). A gap persists, however: this trajectory is rarely confronted with what empirical research shows about the cosmetics consumer, and the chain linking visibility, credibility, decision and loyalty tends to be asserted more than demonstrated.

The general objective of this article is to analyze the challenges cosmetics companies face in standing out in a scenario of intense competition, wide brand diversity and information overload. The specific objectives are: (a) to discuss how market saturation influences purchase behavior and the purchase decision process; (b) to identify the factors that hinder brand differentiation; and (c) to analyze marketing strategies that contribute to brand strengthening, visibility and loyalty. The thesis guiding the discussion is that visibility, credibility and loyalty are distinct and sequential outcomes, and that the coherence between what the brand communicates and what it delivers is what connects them.

The relevance of the study is twofold. For academia, it brings classical marketing theory closer to recent evidence on the cosmetics consumer and makes explicit what each type of source allows us to claim. For management, it offers criteria for selecting communication partners, incorporating trends into the product and measuring customer retention, rather than merely brand exposure.

2 THEORETICAL FRAMEWORKS

2.1 The marketing mix and its limits

Kotler and Keller (2012) define marketing management as the art and science of choosing target markets and of winning, keeping and growing customers through the creation, delivery and communication of superior value. The marketing mix brings together the controllable variables with which the company seeks this result and was systematized by McCarthy (1960) into the 4Ps: product, price, place and promotion. Each P synthesizes a family of decisions, relating, respectively, to the attributes of the offer, pricing policy, distribution channels and communication with the market.

Amaral (2000), in examining 60 documents from the Information Science literature between 1975 and 1995, shows that the model was widely used, discussed and expanded with additional Ps. This finding is relevant to the argument of this article, since it indicates that the mix has always been a structure under revision, and not a dogma. In nondurable consumer goods, the category to which cosmetics belong, the 4Ps remain useful as a planning guide, but they say little about how consumers perceive, interpret and trust the offer.

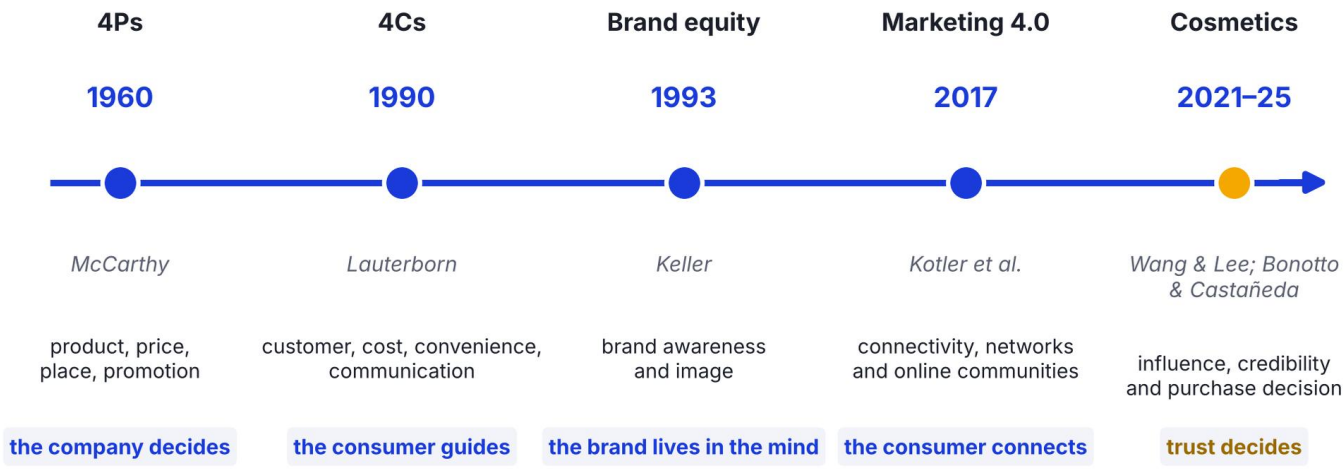
2.2 From company focus to consumer focus: the 4Cs and Marketing 4.0

The main criticism of the 4Ps is that they start from the company's perspective. Lauterborn (1990) proposed, in response, the 4Cs (customer, cost, convenience and communication), which reinterpret the same decisions from the consumer's point of view. The shift does not replace the mix: it changes the criterion by which each decision is evaluated, from "what the company offers" to "what the consumer perceives and experiences."

Digitalization amplified this movement. According to Kotler et al. (2017), the move from traditional to digital marketing does not imply abandoning fundamental principles, but adapting them to a scenario in which consumers are connected, informed and influenced by social networks and online communities. In cosmetics, this transition changes how brands communicate, distribute their products and build perceived value, as the

following sections show. Figure 1 summarizes the conceptual trajectory that organizes this article, and Table 1 translates the correspondence between the 4Ps and the 4Cs into a reading aimed at the sector.

Figure 1 — Conceptual trajectory of thinking about the marketing mix, from the company to consumer trust



Source: prepared by the authors (2026), based on McCarthy (1960), Lauterborn (1990), Keller (1993), Kotler et al. (2017), Wang and Lee (2021) and Bonotto and Castañeda (2025). The focus labels at the base are the authors' interpretive synthesis.

Table 1 — Correspondence between the 4Ps and the 4Cs and a reading for the cosmetics market

4Ps	4Cs	Shift of perspective	Empirical support in the sector
Product	Customer	From the attribute of the offer to the consumer's needs and values, such as appearance and the environment.	Environmental and appearance consciousness raise attitudes toward organic personal care (Kim & Chung, 2011).
Price	Cost	From list price to perceived cost, which includes the effort of comparing and the risk of choosing poorly.	Product origin and price sensitivity enter as moderators of the purchase intention for "green" cosmetics (Hsu et al., 2017).
Place	Convenience	From distribution to the ease of accessing, comparing and buying in physical and digital channels.	The journey takes place across multiple touchpoints (Lemon & Verhoef, 2016); the premium segment highlights e-commerce (Redação Central do Varejo, 2026).
Promotion	Communication	From the message issued by the brand to dialogue and the trust built with the consumer.	Influencer, sponsorship and exposure interact (Wang & Lee, 2021); credibility is the category most cited by Brazilian consumers (Bonotto & Castañeda, 2025).

Source: prepared by the authors (2026). The "Shift of perspective" column is the authors' analytical reading based on Lauterborn (1990); the last column refers to studies cited in the text, whose designs and limits are discussed in Sections 4 and 5.

2.3 Brand, brand equity and influence

Keller (1993) defines customer-based brand equity as the differential effect of brand knowledge, composed of awareness and image, on the consumer's response to marketing. The distinction is useful in this study: exposure contributes mainly to awareness, whereas image depends on favorable, strong and unique associations that mere visibility does not guarantee. Therefore, being remembered is not, in itself, a lasting advantage for the brand.

The K-Beauty phenomenon illustrates how digital communication can strengthen recognition and the perception of value. Wang and Lee (2021) show that the type of influencer, the display of sponsorship and product exposure interact in the acceptance of new Korean cosmetics. Hudders et al. (2021) add, in a conceptual review, that influencers act as agents who commercialize their own audience, which alters the perception of the message and calls for attention to transparency and to the fit between influencer and brand. In these cases, the brand functions as an extension of the identity and credibility of whoever represents it, and branding ceases to be merely a tool for differentiating products and becomes the construction of relationship, meaning and trust.

2.4 Broad supply and purchase decision

The hypothesis that many options impair choice originates with Iyengar and Lepper (2000), who observed lower motivation and lower satisfaction when faced with large sets. Later research qualified it. Scheibehenne et al. (2010) found, in a meta-analysis, a mean effect close to zero and great variability across studies, and Chernev et al. (2015) showed that the effect depends on moderators, such as the complexity of the set, the difficulty of the task, preference uncertainty and the decision goal. Consequently, supply saturation should not be treated as an automatic cause of decision difficulty.

2.5 Experience, trust and loyalty

Oliver (1999) distinguishes satisfaction from loyalty: loyal customers tend to be satisfied, but satisfaction alone does not always produce lasting commitment. Chaudhuri and Holbrook (2001) show, in a survey of 107 brands, that trust and affect lead to purchase and attitudinal loyalty, with distinct effects on market share and relative price. Seiders et al. (2005) add that the relationship between satisfaction and repurchase is conditional and that intention and observed behavior may differ. Loyalty is therefore a process that depends on the quality of the experience and on the coherence between what the brand promises and what it delivers.

3 METHODOLOGICAL PROCEDURES

3.1 Research design

This is qualitative, exploratory and descriptive research with a bibliographic procedure. The objective is to understand, from academic output and specialized documents, the phenomena associated with brand differentiation in the cosmetics market. It is not a systematic review: there was no previously registered protocol, and the purpose is to interpret and articulate contributions, and not to estimate effects.

3.2 Sources, criteria and analysis

The survey was carried out in Google Scholar, focusing on publications about the cosmetics market, consumer behavior, digital marketing, branding, influencer marketing and brand differentiation strategies. The search was exploratory, and the period, the combinations of descriptors and the counts of documents identified and retained were not recorded, as acknowledged in the limitations. Materials adherent to the objectives that dealt with marketing strategies, brand building, consumption trends and competitive dynamics were included; those without a direct relation to the research problem were excluded.

The sources were separated into two groups. The first brings together books and scientific articles, which support the theoretical framework and the claims about consumer behavior. The second brings together specialized press articles with consultancy data, used exclusively to contextualize the sector. The analysis proceeded through critical reading and interpretation, seeking convergences and complementarities among authors and examining each claim in light of the design and sample of the study that supports it. The authors report having used Microsoft Copilot and Gemini as support for textual correction.

4 THE COSMETICS MARKET AND THE CONSUMER

4.1 Market overview and dynamics

The contextual articles describe the environment without testing relationships. The IPC Maps projection indicates consumption of about R$258.8 billion in 2026, up 6.8% (Rocha, 2026). According to Circana, premium beauty grew 10% in the first quarter, above the global average, which the article does not report, and Brazil accounts for about one third of regional sales in Latin America (Redação Central do Varejo, 2026). In the first half, the increase was 6%, and the article associates the result with a polarization, in which both extremes grow while the middle market loses ground, according to a consultancy executive (Féria, 2026).

These numbers suggest a market that is expanding and, at the same time, being reconfigured. For differentiation, polarization is relevant: brands positioned in the middle may face simultaneous pressure from

cheaper offers and from luxury options. This is, however, a press report, without open methodology, and the data do not allow us to infer the causes of the movement.

4.2 Digital influence and credibility

Wang and Lee (2021) manipulated, in a factorial experiment with Chinese millennial consumers, the type of influencer (celebrity or general public), the display of sponsorship and product exposure. The three factors interacted, and acceptance and purchase intention for new K-beauty products were higher in the combination of a general-public influencer, displayed sponsorship and product exposure. Visibility, therefore, is not a single lever: its effect depends on how the message is constructed, and the display of sponsorship did not cancel out acceptance in that combination.

In Brazil, Bonotto and Castañeda (2025) interviewed 11 women aged 21 to 29 in Rio de Janeiro, recruited through Instagram, and analyzed the content by categories. The consumers value quality at a fair price, peer opinion, a bond of trust with the influencer, innovation and credibility, the latter being the most cited category, with trust transferred from the influencer to the brand. The sample is small and restricted by age, which limits generalization, but the study directly accesses the decision-making process of the Brazilian cosmetics consumer.

Meta-analyses from other consumption contexts converge in associating influencers with engagement and purchase intention. Ao et al. (2023) report moderate to high correlations, with credibility the strongest for purchase intention, and Pan et al. (2025) show that the effect depends on the outcome and that there is mediation by persuasion knowledge and credibility. These findings reinforce the reading that credibility is the mechanism that translates exposure into willingness to buy, but they were not obtained specifically in cosmetics.

4.3 Values, sustainability and price

Kim and Chung (2011), with an online panel of 207 respondents, showed that environmental consciousness and appearance consciousness raised the attitude toward organic personal care, and that including past experience and perceived control improved the theory of planned behavior model. Hsu et al. (2017) examine the purchase intention for “green” skincare products and test product origin and price sensitivity as moderators. Taken together, the studies indicate that personal values and price guide purchase intention, which helps explain why attributes such as sustainability and naturalness gain ground in brand communication.

Both studies measure attitude and intention, and not repurchase, and were conducted in contexts different from the Brazilian one. It is therefore advisable to treat sustainability as a plausible and relevant trend, but not as a proven determinant of the national consumer’s choice.

5 DISCUSSION

5.1 Saturation, information and purchase decision

Regarding the first specific objective, the synthesis reveals a less direct relationship than intuition suggests. Consumers have more information with which to decide, but the experimental literature does not confirm that more options always impair choice: the mean effect is close to zero and depends on conditions (Scheibehenne et al., 2010; Chernev et al., 2015). In cosmetics, where categories are numerous, attributes are not always verifiable before use and preference may be uncertain, saturation may plausibly make the decision more costly, but no study examined tests this hypothesis in the sector.

The implication for management is one of method, and not of alarm: instead of assuming that excess supply paralyzes the consumer, it is advisable to reduce the uncertainty the consumer faces. Clear, objective and coherent communication, which presents benefits, differentiators and the value proposition in an understandable way, acts precisely on the moderators identified in the literature.

5.2 Differentiation and trust

As for the second specific objective, the studies indicate that product quality remains relevant but may not be enough to differentiate brands in a market of similar offers. The construction of a consistent identity, associated with credibility and digital communication, then becomes fundamental. In light of Keller (1993),

visibility produces awareness, and differentiation requires image, that is, favorable, strong and unique associations.

The studies by Wang and Lee (2021) and by Bonotto and Castañeda (2025) have different focuses, but their results are complementary. The first shows that exposure and the form of the message affect the acceptance of new products; the second, that credibility is the category most valued in the decision. The comparison suggests that exposure may arouse interest, whereas trust influences the evaluation of the offer. The two studies differ in country, design and sample, so that the complementarity is an interpretation, and not a tested result.

5.3 Marketing strategies, visibility and loyalty

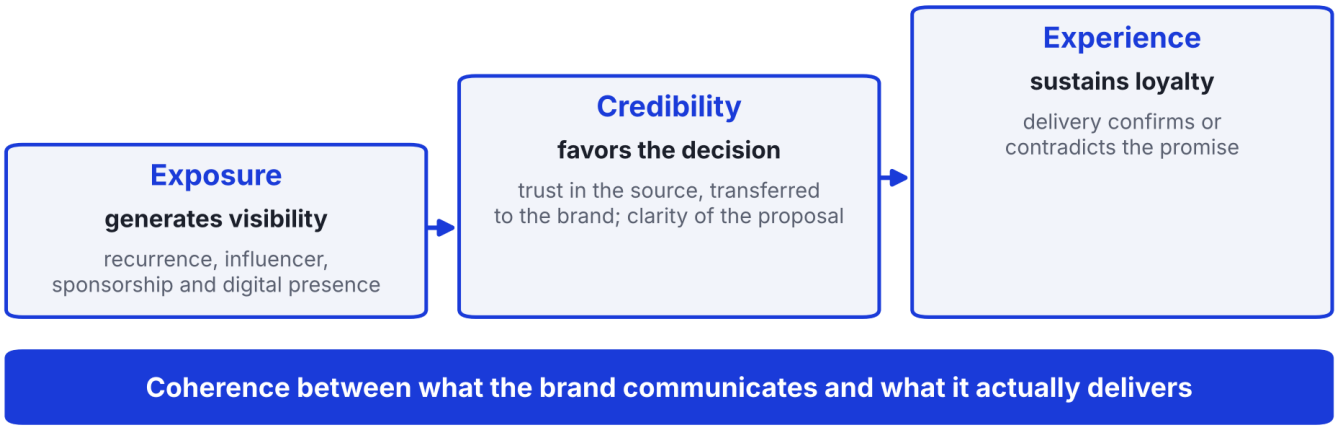
Regarding the third specific objective, three families of strategies appear in the literature. The first is communication with influencers, which can broaden visibility and acceptance, provided there is compatibility among the influencer's image, the brand's values and the audience (Wang & Lee, 2021; Hudders et al., 2021). The second is the incorporation of consumer values, such as sustainability and naturalness, into the product and the offer (Kim & Chung, 2011; Hsu et al., 2017). The third is experience management, which sustains loyalty through trust and affect (Chaudhuri & Holbrook, 2001).

There is, however, a point at which the evidence is fragile: no study in the sector examined measures repurchase. Seiders et al. (2005) show that satisfaction and repurchase are associated conditionally and that intention and behavior may diverge. The link between visibility and loyalty in cosmetics is thus plausible but remains undemonstrated.

5.4 Coherence between promise and delivery

The synthesis of the findings allows us to distinguish three interconnected but not equivalent outcomes: exposure provides visibility, credibility may favor the purchase decision, and a positive experience contributes to loyalty (Figure 2). Each step depends on the previous one, but none guarantees it. A highly visible brand may not be considered trustworthy, and a trustworthy brand may not be repurchased if the experience does not confirm what was promised.

Figure 2 — From exposure to loyalty: three distinct outcomes sustained by coherence between promise and delivery



Source: prepared by the authors (2026), from the synthesis of Sections 2 to 4. It represents an interpretation by the authors, not an empirically tested model.

This is where the consumption trend ceases to be merely a communication argument. Sustainability, personalization and efficacy sustain differentiation only when they are embedded in the product and in the company's practices, since the distance between discourse and delivery compromises the credibility that communication had built. Following trends, therefore, requires effective decisions in product development, communication and relationships.

5.5 Implications for brand management

- **Choose communication partners for credibility and fit.** Reach and popularity are not enough: what matters is the compatibility among the influencer's image, the brand's values and the audience, and the way sponsorship is presented.
- **Reduce consumer uncertainty.** Instead of merely expanding digital presence, organize communication clearly and coherently, so that benefits and differentiators are understood without effort.
- **Incorporate trends into the product.** Attributes such as sustainability and naturalness must be in the formulation and in the practices, not only in the promotional discourse.
- **Measure retention, not just exposure.** Because intention and observed repurchase differ, retention and repurchase indicators should complement those of visibility and acceptance.

5.6 Limitations and research agenda

The first limitation is methodological: the research is bibliographic and narrative, without a systematic protocol, and the record of the screening stages was not preserved, which prevents reproducing the survey and may have left relevant studies out. The second is the scarcity of sector-specific evidence: few studies deal directly with cosmetics, with different samples, countries and designs, and part of the framework comes from other consumption contexts. The third is the use of market sources, which contextualize but do not allow generalization. Finally, there was no field research with consumers or companies.

Future research may test, with Brazilian data, the relationships discussed: field studies that measure purchase and repurchase behavior, and not only intention; experiments on choice overload in cosmetics categories; and comparisons across categories, audiences, sales channels and digital communication strategies.

6 FINAL CONSIDERATIONS

This study analyzed the challenges cosmetics companies face in standing out in a scenario of intense competition and information overload. Differentiation in this market does not depend only on product quality, but on the articulation of brand identity, communication, credibility, experience and coherence in delivering the value proposition. The trajectory of the marketing mix, from the 4Ps to digital marketing, shows that the center of gravity has shifted from the company to the consumer and, today, to the trust the consumer places in the brand.

As for the specific objectives, it was concluded that the expansion of supply and of digital channels increases access to information, but its effect on the decision depends on conditions and is not demonstrated in cosmetics; that the difficulty of differentiation stems from the similarity among offers and from the distance between visibility and image; and that influencer marketing contributes to visibility and acceptance when there is compatibility among influencer, brand and audience, without guaranteeing loyalty by itself.

The main conclusion is also a warning: exposure generates visibility, but it is credibility and the delivery of value that sustain trust and loyalty. For management, this means developing consistent value propositions, selecting communication partners with discernment, incorporating trends into the real characteristics of products and following consumer behavior over time. For research, it means testing, in the Brazilian context, the relationships that proved plausible here but remain little verified.

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Author contributions (CRediT): Bastos, Moura, Santos, Souza and Gomes: conceptualization, literature search, analysis and writing of the original draft; Freitas: guidance, supervision, validation and final review.

Data availability: no primary data were generated; the sources analyzed are listed in the References.

Use of artificial intelligence: the authors used Microsoft Copilot and Gemini as support for textual correction. In this version, Claude (Anthropic) was used to restructure the text, to refine the writing and to verify the bibliographic references. The authors reviewed the content and take full responsibility for it.

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