



Consumer Behavior on Digital Platforms in the Indonesian Local Beauty Startup Industry

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ABSTRACT

The rapid growth of Indonesia's beauty industry, increasing digital literacy among younger generations, and a strong cultural identity have contributed to the emergence of local beauty startups competing on social media and e-commerce platforms. However, limited research has explored how Indonesian consumers evaluate and respond to their digital marketing communication. This study examines Indonesian consumers' expectations, preferences, and digital consumption toward local beauty startups. Using a qualitative descriptive approach, data were collected through in-depth interviews with five informants, supported by a literature review and participant observations. The findings suggest that the informants tended to be selective and critical when evaluating beauty products and digital brand communication. Authenticity, transparency, halal certification, and product credibility are key factors influencing trust and purchase decisions. Informants also highlighted the influence of social media, influencers, live shopping features, and AI-based recommendation systems in shaping online purchase decisions. The study contributes to consumer behavior and digital marketing communication literature by highlighting the interaction between cultural values, trust formation, and technology-driven consumer experiences. The findings provide insights for local beauty startups seeking to develop culturally relevant, transparent, and technology-oriented marketing strategies.

Keywords: beauty startups, consumer behavior, digital marketing communication; e-commerce, Indonesia,

INTRODUCTION

The last five years have witnessed tremendous growth in the beauty tech startup space in Indonesia as the middle class continues to grow leaps and bounds and adopt technology, combined with overwhelming influence of social media on purchasing decision making. Indonesian government has also been supporting local small and medium enterprises in the cosmetics business.

As stated by Statista, cosmetics revenue in Indonesia reached up to USD2.09 billion in 2025. It is expected to grow at 4.73% annually within the 2025 to 2030 interval. In comparison to the rest of the world, the United States will earn the most, at USD21 billion, during 2025. In 2025, each person in Indonesia is predicted to make USD7.40 in revenue. Furthermore, by 2025, 91% of the sales in Indonesia's cosmetics market will be for non-luxury items. The cosmetics market in Indonesia is growing quickly driven by a rising middle class and increasing demand for halal beauty products (Statista, 2025). In addition, Indonesia has the biggest online beauty and skincare market in Southeast Asia, which is in accordance with these numbers (Moojing Market Intelligence, 2024).

The fast growth of the local cosmetics and skincare market, including brands such as Somethinc, Avoskin, and Emina, shows that domestic brands are competitive and that Indonesians' purchasing habits are changing, especially among Millennials and Gen Z (Ministry of Industry of the Republic of Indonesia, 2024). The success of local brands in the domestic market is largely determined by the emotional connection and cultural relevance they build with consumers (Kim & Sullivan, 2019). Beauty and personal care in Indonesia achieved positive growth in both retail volume and current value terms in 2024, supported by several key factors. Younger consumers drove demand, influenced by awareness of hygiene, personal appearance, and global beauty trends (Euromonitor International, 2025).

Understanding consumers' expectations and preferences is foundational to the success and long-term viability of local beauty startups in Indonesia. In contrast to beauty startups that tailor their products and marketing strategies to adapt to the culture and behaviors of the local market, the local beauty startups may face challenges in the market which is highly competitive and continuously evolving. In Indonesia, beauty consumers vary based on age, gender, and geography. The internet, culture, and religion also determine consumer choices.

Local brands now dominate the majority of the market share through competitive price awareness and a culturally relevant quality image (Pahlevi, 2022). Indonesian consumers highly value effective yet affordable skincare products. Furthermore, the Indonesian market is characterized by its young demographic, with Millennials and Generation Z collectively comprising more than half the population (Permana, 2024). SOCO's Insight Factory looked at how Millennials

and Generation Z consumers spent money on cosmetics and beauty items in 2023. The survey used their own database of consumers, which included Millennials and Generation Z from regions across Indonesia, found that most of them (38%) spend between IDR150,000 and IDR300,000 on each transaction (Muhamad, 2024).

Within the startup ecosystem, sustainability, personalization, and the use of local ingredients are emerging as defining trends. Components of Indonesian plant, such as *pegagan* (centella asiatica), green tea, and turmeric, are increasingly embraced by young startups that seek to attract consumers interested in natural products, particularly young consumers who are mindful of the environment. Millennials and Generation Z consumers in Indonesia are increasingly discerning, looking at local influencer ratings, certification marks, and ingredient lists before making purchases (Marta, 2025). Social media trends, suggestions from friends, and digital content from influencers have a big impact on these younger consumers.

Despite this favorable trend toward consumer interest in beauty, the industry also deals with some challenges, including fake products on online trading, unreliable beauty information from social media, and its competition leading to a sense of mistrust about a product (The Food and Drug Monitoring Agency of Indonesia, 2023). Therefore, comprehending the regulations governing beauty startup ecosystem is prominent. All cosmetics traded in Indonesia requires a certification from Food and Drug Monitoring Agency of Indonesia to verify that all cosmetic products sale in this country is safe with good quality.

Given that a large proportion of Muslim in Indonesia, halal certification assumes considerable importance. Today, Indonesian consumers are looking for beauty products that express values of safety, sustainability, halal certification, and 'natural with science' claims (Salma, 2023). According to Law Number 33 of 2014, as of October 18, 2024, all incoming, circulating, or traded products in Indonesia must be halal-certified (The Halal Product Assurance Organizing Agency of Indonesia, 2024). It encourages beauty startups in Indonesia to adopt branding and product design that is considerate of the religious and cultural climate. For these startups, transparency in product formulation, credibility, and social media engagement with consumers can foster strong brand loyalty.

Constructing strategies that are flexible and subject to real local market conditions has to do with the analysis of consumer meaning, re-reading what the consumer thinks, needs and means. "Perceived quality and value influence Generation Z's satisfaction, trust, ethnocentrism and loyalty towards local cosmetics" (Karisadini et al., 2022). In contrast, cultural, personal, and psychological factors affect the local cosmetics purchasing decision relatively greater than price does (Amimi & Suyanto, 2019).

Indonesian consumers no longer pursue traditional products but the

modern ones, which have been perceived useful and effective. Described as 'fast beauty', consumers seek for cheap, digital-native beauty products. Technology and the internet have changed how consumers look for and purchase beauty products. Instagram, YouTube and TikTok are now the places where consumers go to find out about the latest in beauty trends. In addition, beauty vloggers or influencers are crucial in sales as they post content relating to product promotions. Research finds that 89% of TikTok consumers have bought beauty products after being exposed to ads on the app. This evidence demonstrates exactly how social media can impact on purchasing behavior and, by extension, consumer tastes preferences (Mustika Ratu, 2025).

The ease and choice the online shopping facilitates has led to the popularity of online shopping. Especially during the time of COVID-19, primary e-commerce channels such as Shopee, Tokopedia and Lazada are now emerging as one of the biggest channels for beauty products. In order to cater to a larger consumer base, the availability of products across e-commerce platforms should be optimized to gain consumer attention. Predisposition to consumer loyalty and trust is observed in relation to brands with competitive pricing, favorable reviews on e-commerce sites, and quality customer support.

In relation to beauty products, particularly within the Indonesian market, demand is driven substantially by prevailing beauty trends. As previously stated, competitive market digital technology startups must focus on strategic flexibility, consumer preference and expectation alignment, and adaptive operational models (Mustika Ratu, 2025). Some gaps exist between producers' perceptions and consumers meanings, despite the efforts of many startups to incorporate findings from market research. Annisa and Hanafiah found that brand image, product quality, and price perception significantly influenced Generation Z consumers' purchase intentions toward local cosmetic products (Annisa & Hanafiah, 2024). Aulia and Oktariani reported that social media marketing activities and price perception were important drivers of purchase intention in the Indonesian beauty industry (Aulia & Oktariani, 2024). Similarly, Awanda et al. found that product quality and marketing strategies influence consumer satisfaction and market preferences for beauty products (Awanda et al., 2025).

Previous studies have identified factors influencing consumer purchase intentions and preferences in Indonesia's beauty industry, including brand image, product quality, price perception, and social media marketing activities. However, these studies have primarily employed quantitative approaches and focused on purchase intention, satisfaction, or product evaluation. Limited study has explored how consumers perceive and engage with local beauty startups on digital platforms, particularly regarding their preferences, digital consumption behavior, and the influence of cultural and religious values on purchasing decisions.

Therefore, this study explores consumer behavior on digital platforms in

the Indonesian local beauty startup industry. Specifically, the objectives of this study are: (1) to identify the expectations and preferences of Indonesian beauty consumers toward beauty products offered by local beauty startups; (2) to analyze the digital behaviors and shopping channel preferences of Indonesian beauty consumers on social media and e-commerce platforms; (3) to examine the influence of cultural and religious values on consumers' evaluation and purchasing decisions regarding beauty products. Hence, this study contributes to the understanding of consumer behavior on digital platforms within Indonesia's local beauty startup industry and provides practical insights for developing culturally relevant and consumer-oriented marketing strategies.

RESEARCH METHODS

The study employed a qualitative, descriptive approach. Qualitative approach is a research process aimed at understanding human or social phenomena by creating a comprehensive and complex depiction that can be presented in words, reporting detailed perspectives obtained from informant sources, and is conducted in a natural setting (Walidin et al., 2015). The reason for using qualitative study is that researchers explore the patterns, meanings, and subjective experiences of individuals or groups (Sugiyono, 2022).

Unlike quantitative study, which focuses on the positivistic view of reality and offers a superficial description, qualitative study seeks to appreciate the profundity of the social and human phenomena. The researchers analyzed how individuals and groups constructed meaning in their environment and how that meaning constructed their actions. The study is naturalistic, focusing on the variables without treatment and manipulation. This study is sequential, beginning with the identification of a problem, conducting a literature review, formulating research objectives, collecting, analyzing and interpreting the data, and finally, presentation.

To capture comprehensive, multi-dimensional insights into consumer behavior, purposive sampling was employed to select participants with rich, relevant experience within Indonesia's rapidly evolving digital beauty ecosystem. Informants were strategically drawn from three key stakeholder groups to provide diverse yet complementary perspectives on digital purchasing patterns: (1) active end consumers, specifically Millennials and Generation Z, who frequently purchase local cosmetic products via digital platforms; (2) beauty content creators who regularly produce reviews, tutorials, and discussions on social media channels; and (3) industry practitioners directly involved in managing strategic marketing, branding, and communication activities for local beauty brands. This structured tripartite selection ensured robust data triangulation across the entire digital marketplace.

Table 1. Demographic Profiles of the Informants

Informant	Category	Age	Occupation/Role	Selection Criteria
Atami Puspa Reusi	Beauty Content Creator	29	Beauty Creator	Actively reviews local beauty products on social media
Zaki Agung Makarim	Industry Practitioner	29	Brand Marketing Manager	Experience managing digital marketing strategies
Nur Rosidah	Consumer	42	Housewife	Active user of beauty-related digital platforms
Eliza	Consumer	27	Head of the training unit at a beauty course.	Regular purchaser of beauty products through digital channels
Fanesya Fasya	Consumer	24	Graduate Student	Experience using AI-assisted beauty features

Source: Research Data, 2025

This sample size was considered appropriate for the qualitative descriptive approach, which emphasized rich and detailed insights rather than statistical representativeness. Persistent observation focused on recurring themes related to digital purchasing behavior, social media engagement, product evaluation, and trust formation throughout the data collection and analysis process.

Data analysis followed the interactive model proposed by Miles et al. (2020), consisting of data collection, data reduction, data display, and conclusion drawing or verification. Interview transcripts and observation notes were reviewed repeatedly to identify recurring patterns and meaningful statements. The data were then categorized into thematic areas, including consumer preferences, digital shopping behavior, and cultural and religious influences. Themes were refined through continuous comparison across participant responses and interpreted in relation to the study’s theoretical framework and relevant literature.

RESULTS AND DISCUSSION

Informant Characteristics and Observed Consumer Trends

Like any other country in the world, the beauty industry in Indonesia has seen tremendous growth in the last few years. Indeed, it is predicted that ‘the revenue from the cosmetics market in Indonesia has grown almost 48% between the years 2021 to 2024, and will continue to grow more than 5% a year until the year 2028’ (Ministry of Industry, 2024). This growth, however, is stimulated by not only global players in the market but also local companies that have become increasingly competitive in pricing, quality, and innovation. While these statistics provide an overview of industry development, informants perceive this growth as

being strongly influenced by the increasing role of social media, digital accessibility and awareness of self-care practices. Some informants explained that beauty information is now more accessible through social media platforms than conventional media channels.

According to the informants, women remain the dominant consumers of beauty products. Gender-wise, women continue to dominate in the purchase of beauty products, especially skincare, makeup, and bodycare. However, there has been a noticeable increase in male participation in beauty consumption, particularly in urban areas. As an informant explained, “more men are now comfortable using skincare products because self-care is increasingly viewed as part of a healthy lifestyle rather than a practice limited to women” (Interview with Tresna, July 2025). This finding suggests a shift in how beauty and self-care are socially perceived among certain consumer groups.

Informants in this study perceived Millennials and Generation-Z consumers as the most active groups in seeking beauty information and engaging with beauty-related content on digital platforms. Most people in this age group have no difficulty accessing skincare and beauty information and have already incorporated skincare into their lifestyle. Most informants identified these age groups as the most active segments in seeking beauty information and engaging with beauty-related content online. This finding reflects the experiences and observations shared by the participants in this study. They explained that Millennials and Gen Z frequently search for product reviews, follow beauty influencers, and compare product claims before making purchase decisions. That digital literacy shapes beauty consumption practices among younger consumers. Both demographics are extremely active on different social media platforms and are highly responsive to trends while being able to think critically on product claims. The interview data further indicated that these groups are often perceived by informants as important trendsetters within their social networks.

Additionally, consumption is greatly affected by socioeconomic characteristics. Middle-class consumers in particular make up an important part of the beauty products consumers in Indonesia. Hence, even with an improvement in the level of spending power, consumers still act in a rational manner and allocate funds capably toward the purchase of beauty products. Informants emphasized that consumers often compare product ingredients, reviews, and perceived value before making purchasing decisions, suggesting that price sensitivity remains a strong consideration. In addition, the background of the informant's occupation has a notable impact, as well. Several participants noted that individuals working within the beauty industry tend to adopt new products earlier and are more likely to recommend them to others due to their professional exposure and knowledge of emerging trends.

Patterns of beauty consumption differ between rural and urban areas. Urban

consumers are more likely to adopt global trends more rapidly. They engage with modern retail and use social commerce with greater frequency. This is an example of social media being used more for an active purpose of product discovery and acquisition. In contrast, rural areas and secondary cities still rely more heavily on local grocery stores and kiosk for purchasing. These consumers purchase the offline daily necessities and use e-commerce only for certain products unavailable locally. Based on the experiences shared by the informants, participants living in urban areas reported greater exposure to global beauty trends, social commerce features, and digital marketing campaigns. Meanwhile, informants from smaller cities described a stronger reliance on local retail outlets and offline purchasing practices. These findings highlight differences in access to products and information.

Consumption patterns among rural and urban populations show sharp contrasts. Urban consumers have a complete skincare line and routine, regularly using products such as toner, serum, and sunscreen. In contrast, rural consumers tend to simplistic skincare, focusing mainly on cleansing and moisturizing. Study reveals that rural consumers tend to prioritize the more basic functions and offerings of products, such as soap and moisturizer (Suja et al., 2022). Conversely, rural consumers still rely more on physical stores due to limited digital infrastructure. The interview findings similarly revealed that urban-based participants described using more comprehensive skincare routines, whereas participants from less urbanized areas tended to prioritize essential products. The differences between the urban and rural consumption patterns indicate that the beauty brands should focus on different distribution strategies. Furthermore, informants frequently associated Millennials and Gen-Z consumers with high digital engagement, critical evaluation of product claims, and strong consideration of product affordability.

The 'skinimalism' movement has encouraged the younger generation to adopt a more natural appearance instead of a more heavily made up and bold look. A beauty creator, Atami Puspa Reusi, one of the informants, shared a recent change in trends. She explained, "I often see younger consumers choosing simpler skincare routines and looking for products that offer multiple benefits in a single product" (Interview, July 2025). This statement suggests that practicality and efficiency have become increasingly important considerations in beauty consumption. Millennials and Gen Z have been heavily instrumental in trend shaping and are first to adopt new styles. They are more likely to purchase an item after seeing influencer marketing on Instagram and TikTok, and they read reviews extensively. According to informants, social media influencers play an important role in introducing new products, although some consumers remain cautious and prefer to verify product claims through reviews and personal experiences before making purchases.

Social pressure to look desirable, especially in professional environments, is dominant in Indonesia. This is mostly due to the cultural expectations surrounding women. These sentiments are emotional and can stem from within. The sentiments are positive and more aimed toward self-love and personal growth. This is mostly due to the practices and trends surrounding change. The expectations surrounding women are emotionally charged and can stem from within (Sari, 2025). Some informants highlighted that appearing well-groomed is often associated with professionalism, self-confidence, and positive self-presentation. However, participants also emphasized that beauty practices are increasingly viewed as forms of self-care and self-expression rather than solely as responses to external social pressure. In the case of Indonesia, the demographics of beauty consumers is very broad, with millennials and Gen Z heavily influencing the trends and the case of purchasing the products mainly driven by social media and digital marketing.

Expectations and Key Preferences of Indonesian Consumers in Beauty Products

Middle and lower-middle-class people tend to be price-sensitive, but they're also selective. Checking prices, looking for discounts, and waiting until sales were standard activities. There's a critical need for companies to implement an omnichannel distribution strategy that thoroughly integrates their online and offline offerings. Factors such as cultural perceptions surrounding product attributes also matter. The value of beauty products rests on transparent and evidence-based propositions implemented with inclusive omnichannel strategies (East Ventures, 2024).

They are demanding proof and explanation for what brands are claiming. Ingredient transparency is no longer optional; it is required. It is nonnegotiable. Current branding revolves around and promises the importance of natural and advanced technology, halal, cruelty-free, and non-animal tested products. Terms such as clean beauty and all the aforementioned promises capture and sell the new class of beauty products.

Consumers want to invest in products that benefit others, and they want the impact to also reflect their purchases and the causes they support. This means better brand storytelling while continuously clarifying local identity and innovation and connecting product to the needs of local consumers. The expectations that come with brand consumption are demonstrated through the success of Indonesian beauty startups, Skintific and Scarlett Whitening. Risk-benefit trade-offs and a preference for products with scientific validation are dominant. Young consumers are attracted to product education along with visibility around the development process. When Millennials and Gen Z shop, they want evidence of benefits and real benefits as well, along with value for money. Interviews indicate

that overstatements of product benefits lead to distrust. Companies must fine-tune their communication to avoid contradictory overpromising.

Social media, beauty influencers, and digital technology are rapidly changing trends in the beauty industry. The rise of social values that incorporate inclusivity is beginning to change traditional perceptions of beauty. The incorporation of social values into a product provides situational engagement with the consumer and social concern integration. The purchase of an environmentally friendly product can be perceived as a motivated consumer responding to social change (Syauki & Avina, 2020). Companies that offer comparable goods or services to rivals might benefit greatly from emotional branding since it helps set a brand apart from rivals. Establishing a strong emotional bond with consumers is the main objective of emotional branding, which aims to increase sales by appealing to their emotions (Niharika & Yadav, 2023).

Beauty ideals in Indonesia are shifting from fair skin to a more inclusive beauty. Today, beauty is defined by how a person consciously cares for themselves, has self-confidence, and has a positive attitude toward themselves. Industry reports note that these millennials and Gen Z prioritize authenticity and sustainability in beauty products (Sudirjo et al., 2024). Research in Kudus, Indonesia shows that Gen Z in small towns is highly influenced by green brand image and product quality, with green trust being a strong mediator of purchasing intention (Noor et al., 2025).

Brands are communicating how they source ingredients ethically and how their products redeem environmental credits. An Indonesian beauty startup faces competition from Korean beauty products that are sophisticated and affordable. Over the past few years, the K-Beauty products have gained popularity and in 2024, data from Euromonitor International showed that the K-Beauty market in Indonesia had grown by 25% compared to the previous year. A clear indication of interest from local consumers. This is a clear manifestation of behavioral change with respect to the availability of international products, especially Korean beauty products. With the demand for K-Beauty products, many local brands have also resorted to launching products inspired by Korean innovation and technology (Awanda et al., 2025).

The qualitative findings from in-depth interviews underscore that consumers rely heavily on community validation and specific endorsements before making a purchase. For instance, Nur Rosidah emphasized that local beauty reviews act as a primary safety filter against counterfeit products. This primary evidence aligns with macro market trends; a wider survey by Jakpat involving 4,901 respondents similarly indicated that the majority of Indonesian consumers crosscheck social media reviews to verify product efficacy. Furthermore, concerns regarding product safety raised by informants, such as Eliza, are heavily contextualized by recent reports from the Indonesian Food and

Drug Authority (BPOM), which note a rise in cosmetic violations. However, the core evidence in this study remains the nuanced, lived experiences of the informants who actively navigate these risks digitally.

Prioritizing value, quality, and reputation is preferred over price. Displaying trust strengthens the level of satisfaction, yet trust is not the sole determinant of a customer's decision to purchase. Additionally, it appears that the role of customer satisfaction mediation between price and trust in the decision to purchase is weak. Other factors, particularly social proof and the product's immediate advantage, are much more influential in this situation. Considering this, the marketing strategy of aesthetic brands in Indonesia should focus on perceived value through quality and marketing, rather than on competitive prices (Sulistyowati & Hwihanus, 2024). Presently, effective branding encompasses more than selling a product; it entails fostering relationships with consumers and earning their trust. In addition to packaging, cosmetic businesses consider the safety and ethical dimensions of their products during manufacturing. This shows that local beauty startups can take advantage of opportunities, but are also faced with challenges. In the context of the expanding domestic beauty industry in Indonesia, consumers will streamline their preferences towards licensed and demand-satisfying products regulated by the Food and Drug Monitoring Agency that has recorded 76 cases of cosmetic crime, with an approximate economic value of IDR24 billion (Aulia & Oktariani, 2024).

With the right communication strategy, the perception of local cosmetic brands can shift from 'replica' to being valued for their uniqueness, quality, and innovation, such as the strategy of Wardah, Indonesian beauty brand that sets the bar for halal-certified beauty products. Other brands are also trying to meet the same criteria. Scarlett Whitening has become a brand with its brightening lotion and skincare products, which have been heavily promoted by celebrities and influencers, and has been started by Indonesian actress Felicya Angelista. Somethinc is another top beauty startup in Indonesia that makes minimalist, science-based skincare products for Millennials and Generation Z. It also has a strong online presence online, such as in TikTok and Shopee Live. In the same way, Avoskin focuses on products that are eco-friendly and animal-testing-free, which is in line with the growing concern for the environment among Indonesian consumers.

In support of sustainability, the business utilizes eco-friendly packaging and ethically sourced materials. Also thriving on TikTok viral marketing, an Indonesian beauty startup, Skintific, offers affordable and clinically researched skin care products for prevalent skin issues, such as acne and sensitivity. Y.O.U. Beauty has targeted a different segment of the market, successfully positioned for reasonably priced, quality beauty products that is also growing in the ASEAN region. Another example, founded as Indonesia's first personalized skincare

startup, BASE personalizes skin care routines based on consumer assessment using AI and recommends customized products. This is a sign of the increasing demand for personalized skin care, through both product and shopping journey at large.

Digital Behaviors and Shopping Channels of Indonesian Beauty Consumers

Interesting dynamics on how consumers are behaving digitally in Indonesia's beauty industry due to the evolution of social media and e-commerce. Major e-commerce sites such as Shopee and Tokopedia, in addition to TikTok Shop, have become big players and undoubtedly brought the advent of social commerce to Indonesia. This was evident in the priority that some informants placed on e-commerce as their preferred shopping channel, citing it being convenient with highly competitive promotional offers and knowing that they are purchasing genuine products from official online stores. But offline outlets remain relevant to the shopping experience, especially when people need to touch and feel the products to know how they look and feel, or whether they are of good quality. In this sense, the significance of sensorial experience to decision making is emphasized.

For the majority of informants, Shopee is their most-used platform. This is in line with the data of Moojing (2023) that Shopee is the designated e-commerce market leader in Indonesia within the beauty sector. TikTok Shop is ascending as Shopee's alternative as it combines short-video content with live shopping, generating urgency through social commerce. Furthermore, Tokopedia is noted to serve as a less utilized platform, particularly for purchases made at official stores.

Various studies indicate that social media influences purchasing decisions significantly, particularly TikTok, Instagram, and YouTube. Regardless of the contrasting reasons for their perception, all the informants rated live shopping as effective. Siregar et al. described live shopping within the Shopee Live ecosystem or TikTok as a means of enhancing consumer trust through dialogue, real-time interactivity, and authenticity (Siregar et al., 2025). This shows the continued significance of trust and personal research in the purchasing decision.

In recent years, live shopping has become a key trend in social commerce and e-commerce platforms. In accordance with the finding of Ardiyanti (2023), live shopping in Shopee and TikTok also has positive impact on impulse purchasing, with a stronger effect for Tiktok. Interactivity and special offers are primary motivators. Social engagement in live shopping stimulates purchase intention, but stability is achieved by adopting a long-term approach. Trust is a key factor on digital shopping (Xu et al., 2022).

The impact of promotions and discounts on consumer behavior cannot be

denied. This is similar to other consumer behavior patterns identified, flash sales are effective in driving conversions particularly during promotional periods, such as national shopping day (*Hari Belanja Nasional*) or payday sales, due to the urgency and economic pressure they create (Andriyana et al., 2024).

With online shopping becoming increasingly popular, there are a few pros to visiting an offline store. The beauty sector must maintain an omnichannel approach. Brand Marketing Manager of a prominent beauty brand in Indonesia stated, “If you’re a brand, video reviews, short tutorials, before-and-afters and comparison tests are the most powerful drivers of purchasing activity. Content based on evidence is more trustworthy than traditional advertising” (Interviews with Zaki Agung Makarim, 2025).

Influencers are trend setters; for consumers, they are front line opinion leaders. Two research informants, beauty product consumers, followed top beauty influencers such as Tasya Farasya and Huda Kattan, but still took the time to evaluate whether the products were fitting for their personal needs. Conversely, another informant, a beauty creator, stated the significance of honest reviews and the need for product transparency and real time usage. As a whole, this tends to support the opinion that the younger generation are the most critical of the promotional material (Interview with Eliza and Fanesya Fasya, June 2025).

An Indonesian beauty influencer, Tasya Farasya, is known for her trusted reviews of beauty products and the phenomenon ‘Tasya Farasya Approved’ which has gained influential consumer trust label. With millions of followers on social media, she built reputation on critical, honest, and thorough reviews of beauty products. Products receiving the ‘approved’ stamp (Figure 1) gain considerably more trust, which translates into increased sales on e-commerce sites. Consistently establishing her personal brand as a fully independent reviewer, she fosters this trust. From the perspective of consumer trust formation, the “Tasya Farasya Approved” label functions as a symbolic cue that reduces perceived risk in online purchasing decisions. Rather than evaluating every product attribute independently, consumers often rely on trusted influencers as information shortcuts when facing information overload in digital marketplaces. The endorsement does not merely promote a product; it acts as a mechanism through which trust is transferred from the influencer to the brand.



Source: Research Observation on Shopee and Social Media Platforms, conducted on June 15, 2025. Screenshot were collected through systematic platform observation by researchers while examining beauty product promotions, influencer endorsements, and AI-assisted shopping features available to Indonesian consumers.

Figure 1. The stamp 'Tasya Farasya approved' appears on the product of Wardah brand

Product choices have vastly increased, and they provide consumers with a supply-side confusion. Consumers find larger available assortments so confusing that they do not purchase products at all. The 'Tasya Farasya Approved' stamp is a quality indicator and consumers know they do not have to think hard when they see it. This phenomenon demonstrates how consumers negotiate meaning within digital shopping spaces. The label serves as a form of social validation that simplifies decision-making processes and contributes to the construction of collective trust. In this context, influencer endorsement becomes a powerful form of electronic word-of-mouth (e-WOM), often perceived as more authentic than brand-generated advertising messages.

Moreover, Tasya Farasya Approved has an effect on social media as well. Products approved by Tasya Farasya go viral and discussed on Twitter, TikTok, and beauty discussion boards, especially Twitter as a new channel for gathering information (Rusmana et al., 2024). As a result, brand awareness skyrockets. Most importantly, community and consumer network enclosed around a product develop. This stamp of approval, as a result, signals quality and encourages a culture of collective consumption around a product in the beauty industry.

Consumers in Indonesia, particularly those in the Millennial and Gen-Z age groups, want custom personal beauty products and services. Although online shopping is quick and offers many options, consumers want more tailored skincare recommendations. Consumer uncertainty in finding products best suited

to one's skin type is one of the barriers to beauty shopping online. Therefore, the advancements in digital technology prevalent in the beauty industry provide innovations to assist consumers in making shopping decisions.



Source: Research Observation on Shopee Platform, conducted on June 18, 2025. Image was screen captured during systematic observation of AI-based shopping assistance features available on selected beauty product pages.

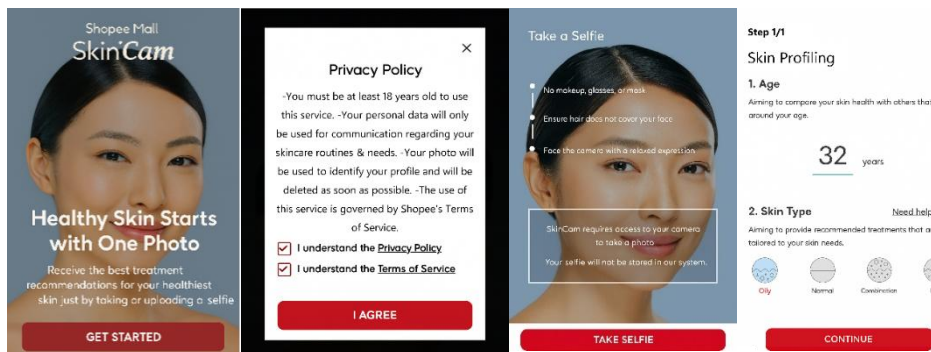
Figure 2. Local beauty product uses the SkinCam feature on Shopee

E-commerce sites are starting to incorporate AI to help address this. For example, N'PURE, a popular skincare line in Indonesia, integrated the SkinCam feature into certain products on Shopee. Beyond its technical functionality, the SkinCam feature represents a shift in how trust is generated in digital beauty consumption. Traditionally, consumers relied heavily on influencer recommendations and peer reviews. However, AI-assisted features introduce a new form of algorithmic trust in which consumers place confidence in data-driven assessments. This finding is relevant to the study's objective of examining how digital platforms influence consumer decision-making processes.

Interactive technology helps consumers feel more comfortable making product purchases, as the shopping process is tailored through recommendations for common skincare purposes. From a marketing perspective, digital SkinCam contributes to the showcasing of personalization strategy in Shopee, speeds up the conversion process, as consumers are more likely to believe data-driven recommendations. Lemon and Verhoef argue that personalization rules, in whatever form they are applied, increase the quality of the experience across different stages of the customer journey (Lemon & Verhoef, 2016). The integration of personalization technology also reflects the evolution of social commerce from a transaction-oriented platform into a decision-support ecosystem. By offering individualized recommendations, SkinCam reduces

uncertainty regarding product suitability, which has historically been one of the main barriers to online beauty purchases.

From a purchasing decision perspective, the SkinCam feature serves a dual purpose: first, as an educational tool for consumers unfamiliar with skincare, and second, as a driver for impulse purchasing, especially when the analysis results are directly linked to promotions or flash sales. The presence of skin cams allows Gen Z to make a purchasing decision as they no longer rely solely on influencers, but on self-assessment as well. Trust is one of the determining factors in online beauty product purchases. The findings confirm the role of sensory shopping experience in purchase decisions, which is also related to the trend of global beauty tech (Krishna & Schwarz, 2014). The use of AI in the beauty industry is driving a shift in consumption patterns toward data-driven ones. By adopting similar technology to L'Oréal through ModiFace, Shopee demonstrates that Indonesian e-commerce is capable of integrating global innovations for local needs (Winarto & Wisesa, 2024).



Source: Research Observation on Shopee Platform, conducted on June 18, 2025.

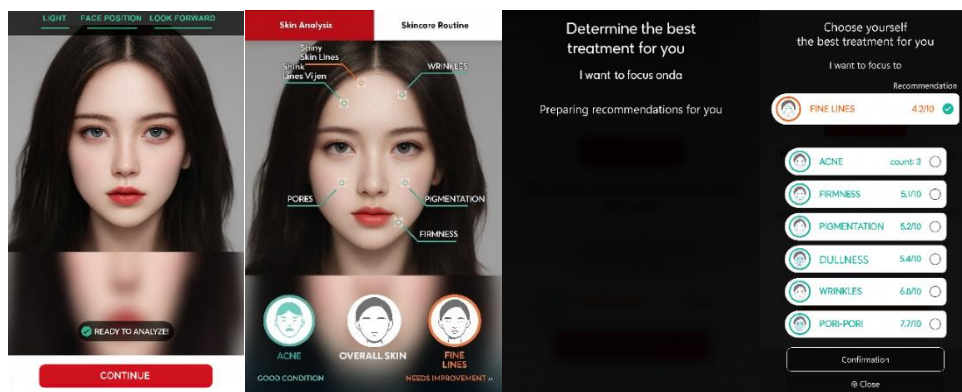
Screenshots were captured while researchers systematically tested the SkinCam feature using the procedures available to platform users.

Figure 3. Stages for using SkinCam on Shopee

Figure 3 shows the steps for using the SkinCam feature on Shopee, which is available in Bahasa Indonesia and translated into English by the researchers. The sequential design of the SkinCam process is also significant from a consumer communication perspective. Each stage, from privacy consent to selfie submission and skin analysis, gradually builds user confidence in the system. The requirement to provide personal data and facial images necessitates a high level of trust in the platform. Therefore, the feature communicates transparency, credibility, and procedural legitimacy to users. This process illustrates how digital platforms actively shape consumer perceptions through interface design. Besides being marketplaces, platforms increasingly participate in constructing trust and

influencing purchase decisions through interactive technological experiences.

The results of employing the SkinCam feature on Shopee are presented in Figure 4. When the user follows the guide to take a selfie, SkinCam analyzes the skin state considering light, face position, and facial expression. The analysis results reveal some important factors, such as broken capillaries, fine lines, wrinkles, pores size, pigmentation and elasticity of the skin as well as brightness level. They provide a score and or number of occurrences (e.g., the number acne breakouts or the degree of fine lines) for each parameter, which gives consumers insight into their skin condition at great detail. From this output, the system also gives personalized treatment suggestions, so consumers may know which skincare focus is good for them.



Source: Research observation on the Shopee platform, conducted on 18 June 2025. Screenshots were documented by the researchers during a systematic test of the SkinCam feature following the procedures available to platform users. The figure presents the skin analysis results and personalized recommendations generated by the AI-based system.

Figure 4. Results of using the SkinCam feature

Additionally, since Shopee's SkinCam feature is usually associated with suggestions from authorized stores of beauty brands, it enhances credibility and minimizes the risk of consumers acquiring fake products. The personalized results generated by SkinCam demonstrate how artificial intelligence transforms beauty consumption into a data-driven experience. Instead of relying exclusively on subjective evaluations or influencer recommendations, consumers are provided with individualized diagnostic information that appears objective and scientifically grounded. It contributes to stronger consumer confidence and may increase purchase intention by reducing uncertainty regarding product suitability.

In relation to the research objectives, Figure 4 illustrates the growing importance of technology-mediated trust in Indonesian beauty e-commerce. That consumers increasingly combine multiple sources of credibility, including

influencers, peer reviews, and AI-generated recommendations, when making purchasing decisions. This reflects an important shift in digital consumer behavior, where trust is no longer formed solely through interpersonal communication but also through interactions with platform technologies.

Cultural and Religious Influences on Indonesian Beauty Consumers

Indonesia has a very rich and diverse culture, reflected in the numerous customs, traditions, arts, and culinary specialties found in every region. The country is also highly diverse in terms of religions and beliefs. The impact of this diversity on the patterns of consumption in the society. Besides, the digital behavior of consumers in the Indonesian beauty market illustrates a unique but selective phenomenon. Social commerce, influencer marketing, and live shopping represent global trends. Though trends influence Indonesian consumers to a certain extent, they prioritize transparency, credibility, and product authenticity, especially regarding review content and predictive analytics. Reflecting the ethical awareness and growing conscientiousness of product contents and ethical manufacturing, Indonesia, a predominately Muslim nation, manifests higher demand for halal-certified cosmetics (Wahab et al., 2023).

Concerns should be raised regarding the view that domestically produced cosmetics are merely imitations of international brands, especially given the emphasis on global standards, the inclusion of foreign brand names, and the adoption of foreign brand aesthetics, all of which overlook the high quality and creative innovations many local brands offer.

Muslim consumers constantly prefer halal cosmetics brands that align with their belief, values, cultural norms, and practices. Local wisdom is part of the way companies stimulate the emotional aspects of consumers, which forms a bond between consumers and their love for local culture, and even becomes a unique identity. Companies that want to connect with consumers must develop an emotional brand. Zaki Agung Makarim agrees that cultural elements and halal certification are fundamental aspects to be communicated to consumers.

Research findings indicate that attitude, perceived behavioral control, and brand awareness influence the purchasing intention of Muslim women towards halal cosmetics. Attitude, perceived behavioral control, and brand awareness exert a notable favorable influence on consumers' propensity to purchase halal cosmetics (Ismail et al., 2024). Wardah is the first halal-certified cosmetics brand in Indonesia, designed to keep pace with current beauty trends, using high-quality natural ingredients while avoiding substances that may pose health risks to the skin or body.

Even for non-Muslim consumers, the halal label becomes a consideration when purchasing products. Non-Muslim consumers view the halal label as a guarantee of safety, health, quality, and consumer protection. It provides

assurance to consumers that the product has met certain standards, which can add value for those prioritizing verified products. Thus, psychologically, it imparts a positive vibe and assurance that can attract the interest of non-Muslim consumers seeking products with high cleanliness and safety standards.

In the last few decades, globalization and advancements in technology, particularly in the digital sphere, have shifted consumer behaviors and expectations, significantly altering how brands build relationships with consumers in the beauty industry. Up until the 1980s to 1990s, the industry was mostly focused on promoting its cultural heritage. In Indonesia, beauty products such as body scrubs, rose water, and cold powder had market dominance by proclaiming the use of traditional spice ingredients. The 2000s, and more specifically the last decade of the 20th century, saw the birth of local brands with a strong digital presence which greatly shifted industry dynamics. The decade starting in 2010 saw a great increase in beauty influencers and vloggers, leading to the direct use of social media by brands as a marketing tool and allowing brands to engage in two-way communication with consumers. In this period, brand marketing strategies built a strong emphasis on the recognition, and celebration, of local diversity and eco-sustainable practices. Local brands are increasingly attuning their alignment with consumer needs and values and trends. This demonstrates the unique role 'beauty' can play in achieving social empowerment and environmental sustainability (Aruman, 2024).

Beauty branding and the communication of those brands have undergone considerable transformation. Contemporary branding has begun to incorporate and prioritize local wisdom. For instance, Indonesian beauty products, have become more inclusive to all Indonesian women, as women from different regions have diverse shades of skin. Influencers often highlight the importance of brands catering to a diverse range of shades, and are unreserved in critiquing brands that lack inclusivity.

Previously, beauty was defined strictly as having fair skin, a slim body, and a symmetrical face. This ideal is starting to change in the community, especially among the youth, who realize that beauty can be diverse. There is less of a pressure to conform to the so-called 'perfect' beauty standards, and people are more willing to display their true selves, embracing their individuality and uniqueness. At present, our consciousness in self-care, self-confidence, and positive self-regard encompasses the meaning of beauty.

The language represents the quality and benefits of the products. Bahasa Indonesia might create some positive associations for the products, as the brand names promote more Indonesian identity national identity in international market and resound nationality (Zein, 2019). The demand characteristic of each area in Indonesia is different. For example, Sundanese in West Java have relatively more fair skin than the eastern part of Indonesia, which requires brighter makeup

shades. On the other hand, Balinese culture is a bit different from other regions in Indonesia, as Bali is well-known for its natural beauty treatment such as SPA (Ferdinand & Ciptono, 2022).

CONCLUSION

This research examines how Indonesia's beauty industry is changing within the intersections of culture, the digital realm, and technology. Beauty startups are receiving great attention lately, and consumers are increasingly purchasing products from beauty and personal-care startups. The findings suggest that the Millennials and Generation Z consumers interviewed in this study were digitally literate and attentive to authenticity, personalization, and transparency when evaluating beauty products. The findings suggested that digital platforms, particularly TikTok and Shopee, could shape purchasing behaviors among the participants interviewed in this study.

Local beauty startups and brands that is culturally fit have gained consumer attention, for example by receiving halal certification, along with ethically embracing AI algorithms personalization. Consumers respond positively to personal engagement strategies, while trust remains a critical factor influencing purchasing decisions.

The findings suggested that the research informants, particularly Millennials and Generation-Z consumers, relied on social media, influencers, live shopping, and AI-powered features when searching for information and making purchasing decisions. Trust is built through a combination of influencer credibility, electronic word-of-mouth, and technology-enabled personalization. These findings contribute to the literature on digital consumer behavior by highlighting the growing role of algorithmic trust alongside interpersonal trust in the beauty industry. Practically, the study suggested that beauty brands prioritize authentic communication, transparency, and personalized digital experiences to strengthen consumer trust. However, the findings are limited to the perspectives of the small number of informants and ungeneralizable to all Indonesian consumers. Future research may involve larger and more diverse samples with quantitative or mixed-method approaches to further examine digital beauty consumption and trust formation.

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