

CHANGES IN PURCHASE AND USAGE PATTERNS OF COSMETICS DUE TO COVID-19 PANDEMIC: A CASE STUDY OF WOMEN OF GURUGRAM

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ABSTRACT

Cosmetics are an important part of the modern lifestyle of people. In 2019, the international cosmetics market amounted to \$380.2 bn and by 2027, will grow to \$463.5 bn.). The Indian Cosmetics Market size was \$13.19 billion in 2020 and is projected to expand to \$28.98 billion by 2026 showing a CAGR of 16.39% through 2026. The COVID-19 pandemic has impacted the practices of businesses as well as the lives of consumers. This has led to a change in the purchase behaviour of consumers. Such a change has been caused by many variables such as falling incomes, lockdowns, low availability of goods, breaking down of supply chains as well as accessibility of products. As there has been a change in the purchase behaviour of consumers due to the pandemic, this research aims to study the change in the cosmetic purchase behaviour of females in Gurugram, a city in Haryana (India), if any on various variables. A structured questionnaire-based survey of the 159 women of Gurugram was conducted to examine the impact of Covid-19 pandemic on the factors affecting cosmetics buying behaviour like customer buying behaviour like product brand, variety, price of product, friends recommendation, advertising, celebrity endorsement, social media marketing, e-word of mouth and product information.

Keywords: *Cosmetics, Buying Behaviour, Covid-19, Women, India.*

Introduction

In 2019, the international cosmetics market amounted to \$380.2 bn and by 2027, will grow to \$463.5 bn. Further, this market is projected to have a CAGR of 5.3% during the period of 2021 to 2027 (Chouhan et al., 2021). The Indian Cosmetics Market size was \$13.19 billion in 2020 and is projected to expand to \$28.98 billion by 2026 showing a CAGR of 16.39% through 2026 (Research & Markets, 2021). Cosmetics are an important part of the modern lifestyle of people. The global demand in this market has increased due to the consumers' focus on external beauty in addition to internal intelligence in the recent years. The global markets have also grown due to an increase in cosmetic use by men, in addition to women. However, female consumers hold the largest share as they are more inclined to cosmetic products.

The COVID-19 pandemic has impacted the practices of businesses as well as the lives of consumers. This has led to a change in the purchase behaviour of consumers. Such a change has been caused by many variables such as falling incomes, lockdowns, low availability of goods, breaking down of supply chains as well as accessibility of products (Eger et al., 2021). There has been a positive response from the cosmetics industry in the form of increased production of sanitizers or other cleaning agents as well as provision of cosmetic services free of cost to the frontline response workers. In such a time, the leaders of this industry must fulfil their responsibility to make sure of the survival of their companies. Internationally, the beauty industry accounts for sales of \$500 billion per year and provides employment to millions of people, both directly and indirectly (Barreiras, 2020). As there has been a change in the purchase behaviour of consumers due to the pandemic, this research aims to study the change in the cosmetic purchase behaviour of females in Gurugram, a city in Haryana, India, if any on various variables.

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Background

On 11 March 2020, the coronavirus, which originated in China, was declared as a pandemic (WHO, 2020). The closure of malls, shop, markets as well as problems faced by businesses created many difficulties in purchase of products by the consumers. For a short duration in the areas which were categorised as 'red zones' the online deliveries of products could not be completed. A large number of cosmetic and beauty brands responded positively to the pandemic by starting the production of hand sanitizers (Kalyani, 2020). A pre-pandemic survey showed that customer preferences favoured the purchase of products from retail stores as compared to online platforms. The consumption expenditure was seen to increase by 14% for personal care products whereas the amount spent by consumers on skincare and makeup products decreased by 15% in the Indian markets (McKinsey, 2020).

Purchase behaviour of a consumer refers to the positive or negative reaction for a product which is influenced by both internal as well as external factors. Such factors include level of income, product's price, package, ingredients, as well as consumers' preference for specific brands and more (Sharma & Mehta, 2020). The purchase behaviour is further impacted by social media platforms, ads as well as other content to promote the product. Many customers shifted to using a different brand as certain products were not available due to the breaking down of supply chain and other difficulties. Largely, the difference in buying behaviour is seen in products which are essential for daily use, hoarding of products as well as keeping a stock of groceries, and products relating to hygiene and self.

Literature Review

• Consumer Buying Behaviour

Consumer buying behaviour refers to the involvement of a customer measured emotionally, physically as well as psychologically, in the process of purchasing products. This consumer behaviour is impacted to a large extent by pricing, advertisements of product, substitutes available as well as consumer's income level (Sroka, 2020). It has been observed that a large part of decision making is taken up by products which are bought occasionally whereas frequently bought or daily use products do not require high level of involvement from consumers' side. In addition to price of a product, the purchase behaviour is also impacted by the religion and culture of a consumer since these are important aspects of consumers' lives (Pal et al., 2020).

The sales of a product are impacted both in the short and long run by variables which get favourable response from customers such as various tools for promotions, discounts, no-cost samples, marketing coupons, as well as other offers (Sroka, 2020). For instance, it has been observed that millennials are willing to pay a higher price for products which are eco-friendly even if such products do not have higher functionality (SivaKumar & Gunasekaran, 2017). In online shopping, the factors which have a large impact on consumer buying decisions are largely psychological and perceived, such as the how others have reviewed the product, the impression formed by product and the like.

• Consumer Buying Behaviour during Pandemic

Due to the pandemic, there have been many new threats and opportunities for businesses which has led to a need for changing marketing strategies. These shifts have caused many financial difficulties for business and thus, to ensure survival of business in the market, adaptation to new environment as well as innovation are needed (Kalyani, 2020). Many companies have been forced to shift to newer technologies in order to sustain and the companies which were earlier against such adaptations have also showed willingness to use such technological solutions (Sharma & Mehta, 2020). Many organizations have started making use of digital marketing during the pandemic. Digital marketing has been seen to have a large impact on the attitudes that consumers show towards a product.

The pandemic has caused delays in the supply chain processes, reduced productivity in production units, fall in demand by the customers as a result of increasing unemployment and an overall reduction in household income (Eger et al., 2021). According to Islam et al. (2021), in the initial stages of lockdown, consumer demand fell. However, the consumption expenditure again rose to pre-pandemic levels later. In the earlier stages, many consumers started hoarding essential goods such as groceries, hygiene products and more due to the uncertainty about availability of goods in the future. Such hoarding and stockpiling led to increase in the amount spent by consumers on groceries and this expenditure was different in different locations and demographic conditions. As lockdowns ended across regions and there was increased accessibility to markets, the purchase of essential products decreased suddenly. After the COVID-19 pandemic, it is projected that there will be five consumer segments, namely Get to normal, stay frugal, cautiously extravagant, keep cutting, back with a bang (Vautier, 2020)

Many consumers have started shopping online due to the pandemic. Consumers were also seen to be increasingly conscious while purchasing. It was observed that the fear of infection has caused the development of negative attitudes in consumers towards physical visits to stores (McKinsey, 2020). In red zones, customer preference favours home delivery as well as online shopping. Food retailers are increasing investment in capital as well as human resources for building strong supply chain and ensuring timely deliveries. Even though online shopping is increasingly preferred by consumers, various business processes have been delayed by breaking down of supply chain and thus online shopping has been impacted as buying behaviour of consumers goes down (Thakur et al., 2020).

- **Consumer Buying Behaviour for Cosmetics**

Humans have frequently made use of cosmetics for improving their external beauty. Recently, increasing number of men have also started using cosmetic products in order to increase self-presentation, and to be more confident about how they appear. The buying behaviour towards cosmetics is influenced by the brand preferences, product accessibility, advertisements, promotional content, price of product, quality of after sales services, quality of product, product designing as well as package, product features and more (Pal et al., 2020). The purchase decision is also impacted by the religious beliefs of consumer. Marketers can make use of celebrity advertising, product pricing as well as ensuring high quality products to build long lasting relationship with consumers of cosmetic products (Sharma & Mehta, 2020).

Consumer preference is favourable towards organic, home-grown cosmetic products and a major factor influencing purchase decision is the quality of product. It is seen that majority of customers show brand loyalty. In terms of brand loyalty, it is seen that women, married or not, have sensitivity towards pricing, product quality as well as ingredients used (Tomar, 2018).

Increasing awareness about environment sustainability as well as concerns over health have caused an increasing willingness to pay higher prices for environment-friendly products. However, there remains a large information gap related to the green cosmetic products which is caused by lack of effective communication. Organizations must focus on fixing such gaps by making use of Integrated Marketing Channels (Cinelli et al., 2019).

In case of cosmetic products, customer attention can be brought by ensuring that product design and packaging is of high quality, even if the functionality or product quality itself is not very high. It is seen that consumers have higher intentions of purchasing those cosmetic products which have high quality advertisements. On the other hand, it has been observed that Gen-Y consumers give higher preference to quality of product, even if advertisements and promotional activities are of high quality (Fortunati et al., 2020).

Consumers take part in online shopping of cosmetic products once they are sure that the product and the online website is genuine. The purchase decision of millennial consumers is impacted greatly by celebrity endorsements and recommendation of products from social media influencers (Cinelli et al., 2019). However, to build a customer base, a company must make use of other promotional activities. Consumer satisfaction is influenced to a large extent by pricing, product quality, after sale services and more while shopping online for cosmetic products. Companies offering cosmetic products online must be careful about reviews since these impacts the image of the brand as well as customer buying behaviour (Pal et al., 2020).

Many female consumers have been seen to impulsively purchase products and as a result, marketers develop products which are visibly pleasing to the customers which is dependent of two characteristics viz. consumer characteristics and product characteristics. Large proportions of cosmetic items are bought by women and there is high variety of products available in the segment of female cosmetics (ALsahli & Ahmed, 2021).

- **Impact of Covid-19 on Consumer Buying Behaviour for Cosmetics**

All over the world, cosmetic companies produce different beauty products by combining different chemicals. Customers purchase and use such products in an effort to improve their external beauty or body odour. Before the COVID-19 outbreak, several factors were causing the market to grow, such as upgrade to better lifestyles, increasing levels of income, rising concerns over external beauty and more (Pal et al., 2020). Further, the promotional activities of companies now include use of social media platforms such as Instagram, Facebook and the like, to increase engagement with customers (Arab et al., 2019). Promotion of products on such platforms is possible by taking help of social media influencers.

Since the beginning of the COVID-19 pandemic in early 2020, the growth in the international cosmetics industry has reduced to a great extent (Kalyani, 2020). This is because the lockdowns implemented by governments created a shortage of labour which cause manufacturing units of cosmetics to temporarily shut down. Businesses were also forced to reduce workforce and implement work from home policies which further lowered production of goods. The pandemic also caused closure of many stores which were selling cosmetic and beauty products.

As more and more cosmetic retail stores close and sales in the first quarter fall, the fashion industry was greatly hit, in a much similar or even worse manner than in the 2008 financial crisis. Considering the opinions of international executives and keeping in mind the current trends, the worldwide beauty industry can face a drop in revenues of 20-30% in the year 2020 (McKinsey, 2020). However, many indicators suggest that the industry will manage to bounce back just as it did during the 2008 crisis and this industry has successfully developed generations of consumers who show high levels of loyalty.

Methodology

The aim of this study is to examine the impact of Covid-19 pandemic on the cosmetic purchase area of females in Gurugram. The researcher conducted a sample survey of the women of Gurugram. A questionnaire was drafted which had 25 questions of which the first six questions were based on the demographic profile of the respondents. The next eight questions were asked to identify the purchase behaviour of the respondents for the cosmetics. From question 15 to question 25 the respondents were asked about their cosmetic buying behaviour in pre-covid and post-covid scenarios. The factors which were discussed in question 15 to question 25 were based on the factors which govern customer buying behaviour like product brand, variety, price of product, friends recommendation, advertising, celebrity endorsement, social media marketing, e-word of mouth, product information and others. To evaluate the perception of the respondents on the above mentioned factors 5-point Likert's scale was used. The weighted average method was used to compare score of the above mentioned factors in pre-covid and post-covid scenarios.

The researcher pilot tested the questionnaire with five respondents to identify the errors. The errors identified in the pilot test were rectified and the final questionnaire was used for the survey. Because of the pandemic situation the researcher decided to use Google form to collect the responses. The questionnaire was prepared in the Google form and the link was shared with the prospective respondents through WhatsApp and other social networking platforms. It was decided to collect 150 responses for the survey. The final sample size was 159 women from the city of Gurugram. For the significance testing chi-square test was used by the researcher with the significance level of 95%. The data was analysed using SPSS software version 23.

Discussion and Data Analysis

As a part of the research, researcher surveyed 159 women cosmetic customers and users. The survey results were compiled and analysed for findings. This chapter discusses the findings and observations made from the data. The observations made can broadly be divided into four categories namely demographics, buying behaviour and the comparative changes before and during Covid-19 crisis. 159 respondents were surveyed that were a good mix of different age groups majority of which were salaried (66) or homemakers (41), married (124) with an average family income of above Rs. 100000 (78). Almost entire sample size was Hindu (155) with a family size of less than 2 (88) or less than 4 (65).

Majority of respondents were rare cosmetic shoppers (91) or purchased cosmetics once every month (45). Most of the respondents monthly less than Rs. 1000 on cosmetics (94) whereas 40 respondents spent between Rs. 1000 to 3000 per month. Respondents used cosmetics only when they went outside home (55) or occasionally (55). Wearing cosmetics at home was clearly not popular. Majority bought cosmetics from branded shops (45), online (15) or shops in nearby malls (16) or local shops (18). Majority bought cosmetics for self (122) but some for their family members also (22). People used cosmetics for body care, look attractive or improving their self-image. Most customer bought only cosmetics of famous brands only. While majority (84) respondents changed their buying behaviour, 50 (one third) of them did not find any change in their buying behaviour. They stated that they decreased their cosmetic spending (109) during the pandemic crisis. Majority of respondents also agreed that they cosmetic usage pattern has also changed during the pandemic. Considering the fact that most people stayed in-house during the pandemic crisis and used cosmetics while they went outside or used it rarely, changed pattern could be a result of this change pattern of living.

Table 1: Change in Behaviour for Different Segments of Cosmetics

Change in Behaviour	Eye makeup	Skin Care	Hair Care	Face Care	Lip Colour	Hair Colour
Increased	28	53	55	51	14	13
No change	51	76	72	75	46	85
Decreased	80	30	32	33	99	61

A part of the questionnaire and this research pertained to understanding whether or not and how cosmetic buying behaviour has changed during Covid-19 compared to their behaviour prior to the pandemic crisis. Considering the majority response as the mass opinion from the table above, it was observed that eye make-up and lip-care consumption decreased during Covid-19 whereas skin care, face care and hair care product consumption remained same as before the crisis started. This could be because of the fact that eye make-up and lip care are mostly used and worn when a person is going out of home or attending some social gatherings. Since Covid-19 outbreak, most people are refraining from going out, attending social gatherings. Moreover, work from home culture developed during this pandemic. When people are locked inside their homes, they are not using the cosmetics mostly used while outside. On the other hand, the general health and body care cosmetics like hair care, skin care and face care were used to keep updated on personal care.

Customer purchased cosmetic products based on certain features like brand, variety of products, price etc. The customers were asked how their buying behaviour changed pertaining to their criteria regarding buying products during Covid-19 compared to before the pandemic. Although usage behaviour has changed during the pandemic, response to these questions should reveal whether buying preferences have changed during the pandemic.

As is evident in the table below, despite changes in the usage of cosmetic products the buying criteria barely change barring a few exceptions. The weighted average scores for all the buying preference criteria like product brand, variety, price, advertising, celebrity endorsements, social media influence and e-word of mouth publicity increased by 5% to 12% whereas those for sales person recommendation and friend recommendation decreased by 1% and 4.5% respectively. The changes were too marginal to be considered relevant. Hence, it was concluded that there were hardly any behavioural changes in terms of buying criteria or preferences before and during the pandemic crisis. This could be interpreted from the findings that consumers had their personal preferences while buying or choosing their preferred cosmetic product and stuck to the same criteria. This could be due to the reason that customers had prior experience attached to the given criteria and could evaluate the products on the same even during the pandemic. This is why they continued with their same buying behaviour both before and during the pandemic. This could be a valuable finding for marketers because this means that they can continue with their same marketing strategy during pandemic as they were doing before.

Table 2: Importance of Various Factors in Pre-Covid and Post-Covid Scenarios

Attribute	Stage	Weighted Mean	Percentage Difference
Product brand	Pre Covid	3.26	5.21
	During Covid	3.43	
Variety	Pre Covid	3.08	5.51
	During Covid	3.25	
Price	Pre Covid	2.89	8.71
	During Covid	3.14	
Product Advertising	Pre Covid	2.47	9.16
	During Covid	2.70	
Celebrity Endorsement	Pre Covid	2.14	10.85
	During Covid	2.38	
Social Media Influence	Pre Covid	2.43	9.07
	During Covid	2.65	
e-WoM	Pre Covid	2.12	11.28
	During Covid	2.36	
Product Information	Pre Covid	2.56	11.55
	During Covid	2.86	
Sales Person	Pre Covid	2.48	-4.57
	During Covid	2.36	
Recommendation	Pre Covid	3.06	-1.03
	During Covid	3.03	

Looking at the weighted average scores for different criteria, the brand, variety available, price and friend's recommendation scored the highest indicating that these were and still remain the most influential factors affecting buying behaviour.

Another interesting finding could be that weighted average scores for these criteria remained near the average score of 3 showing that they did not affect too much on consumer preference. This could indicate that customers already have set preferences based on their earlier use of products and experience. Customers prefer believing more on those and hence don't respond as much to marketing stimulus like brand, variety, price etc.

Another significant part of researcher's observations came from the cross tabulation of the data in terms of the demographic features. To establish cross impact of any demographic criteria from another criteria of researcher conducted chi-square test.

Table 3: Comparison of p-values

	Age	Profession	Income	Marital Status	Family Size
Any change in your cosmetic buying behaviour during Covid-19	p=0.459	p=0.270	p=0.189	p=0.635	p=0.635
Monthly expenditure on cosmetics decreased during Covid-19	p=0.063	p=0.011	p=0.556	p=0.557	p=0.557
Any change in your cosmetic usage behaviour during Covid-19	p=0.321	p=0.003	p=0.042	p=0.648	p=0.648

No significant association was found using p value (chi-square test) between age and buying behaviour (p=0.459), age and monthly expenditure change (p=0.063) or age and consumer usage (p=0.321).

When tested for professional background, no association could be established between professional background and buying behaviour (p=0.270) but there was association between professional background and monthly expenditure (p=0.011) and professional background and consumer usage (p=0.003).

Similarly, in case of monthly income and related criteria, it was observed that although no association was established between income and buying behaviour (p=0.189) and income group and monthly expenditure (p=0.556), there existed association between income groups and usage (p=0.042).

When investigated for association between marital status and buying behaviour or monthly expenditure or usage, no association was found with buying behaviour (p=0.635), monthly expenditure (p=0.557) or consumer usage (p=0.648).

Similarly, for family size also, no association was confirmed between family size and buying behaviour or monthly expenditure or usage. P values for the three were 0.895, 0.068 and 0.080 respectively.

Conclusion

Covid-19 has taken world by surprise and has virtually overtaken our lives and life style. Cosmetics are important part of a woman's life and life style. As people are forced to stay indoors due to pandemic crisis and lock-down situations, people's life style and social life has changed drastically. This research started with an aim to identify the change in purchase and usage patterns of cosmetics among women of Gurugram during Covid-19 pandemic. Researcher conducted detailed analysis of the literature available on Covid-19 and cosmetic industry and related consumer behaviour. Consumers buy cosmetics to look good and take care of their body. They also use cosmetic products to feel good and confident. Cosmetics have special place in the lives of women worldwide and India too. But Covid-19 seems to have changed much for Indian cosmetic buyers and consumers.

To confirm the literature findings, researcher also conducted a survey of 159 Indian female respondents and analysed the data collected for final findings. It was observed that Covid-19 has considerably affected consumer buying behaviour, monthly expenditure and usage pattern of the sample size. This could be because of the fact that the lifestyle has undergone a tremendous change due to pandemic and frequent and long lockdowns. Moreover, people have also started avoiding social gathering, outdoors and meeting friends or relatives. People like wearing makeup when they are going out because this makes them look and feel good but now that they are not doing it often, they have changed their buying and usage pattern.

It was noticed that usage of different products was affected differently. For instance, usage of lip care and eye care products decreased during Covid-19 but, at the same time, usage of body care products like hair care, skin care or face care remained nearly same. Consumer kept using body care products however decreased other cosmetic products that are mostly used outdoors or during social gatherings. Because outdoors and social gatherings were not taking place, Indian women customer decreased usage of related cosmetic products.

Research also investigated possible association between demographics and consumer buying behaviour, usage and monthly expenditure. Professional background was found associated with monthly expenditure and usage. Similarly, association was established between monthly income and cosmetic usage. No other associations were observed in the research. Finally, researcher concludes that Covid-19 has considerably changed the buying behaviour and usage pattern of Indian cosmetic consumers. Buying and consumption pattern has largely changed due to drastic change in the lifestyle and decrease in the outdoor activities of the consumers.

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