

DIGITAL FOOTPRINT OF CONSUMER PREFERENCE: GOOGLE TRENDS ANALYSIS OF HALAL COSMETICS MARKET TRENDS IN INDONESIA



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Abstract

This research investigates the digital footprint of consumer preferences by analyzing halal cosmetic market trends in Indonesia through five-year Google Trends time-series data. Using Korean cosmetics as a global benchmark, the study employs a stepwise quantitative methodology that integrates slope calculations grounded in the Theory of Planned Behavior (TPB) and quadrant analysis based on Segmenting, Targeting, and Positioning (STP) strategies. The findings reveal that halal cosmetics exhibit greater consumer interest stability with an aggregate slope of -0.08, compared to -0.31 for Korean skincare. Furthermore, the quadrant analysis successfully categorizes regional segments into Hybrid, Trend-Driven, Low-Involvement, and Conscious markets. The study concludes that the integration of slope parameters and spatial segmentation effectively captures market dynamics, providing a robust strategic foundation for optimizing halal cosmetic marketing tailored to the specific preference characteristics of diverse Indonesian regions.

Keywords: Halal Cosmetics, Google Trends, Consumer Preference, Big Data, Indonesia

INTRODUCTION

The global halal cosmetics industry is currently navigating an exponential growth trajectory, with its market valuation projected to reach \$81.31 billion by 2034 (Fortune Business Insights, 2025). This surge is not merely a demographic byproduct of the growing Muslim population but is driven by a fundamental shift in global consumer consciousness. Modern consumers increasingly demand products that align with ethical, cruelty-free, and sustainable values, principles that are inherently embedded in the halal-thayyib (permissible and wholesome) framework (American Halal Foundation, 2025.; Koswara & Herlina, 2025). In the Indonesian context, this urgency is further intensified by the enforcement of Government Regulation No. 42 of 2024. This mandate requires all cosmetic products to be halal-certified by October 2026, effectively transforming halal status from a voluntary marketing advantage into a mandatory legal requirement for market entry (Fatwa MUI, 2024; Ismail et al., 2024).

However, despite this robust regulatory framework, the Indonesian beauty landscape is characterized by a complex competitive dichotomy. While religious compliance is rising, the “Korean Wave” continues to exert a profound influence on consumer preferences, particularly through the K-Beauty phenomenon. Paradoxically, recent empirical evidence indicates that the high perceived value and prestige associated with Korean cosmetics often lead consumers to bypass concerns regarding halal certification in favor of aesthetic results and brand popularity (Ramadhani et al., 2023). This tension between religious obligation and the allure of global beauty standards creates a volatile market dynamic that remains insufficiently understood in contemporary literature.

Furthermore, the rapid digitalization of the Indonesian market has fundamentally altered the path-to-purchase. Data indicates that approximately 91.2% of consumers now utilize digital channels, including search engines, to conduct rigorous product research before finalizing a transaction (Accenture, 2022). As over 60% of skincare purchases in Indonesia have migrated to e-commerce platforms, digital footprints such as search queries have become the most reliable indicators of real-time consumer intent and market shifts (Nasuha, 2024). Consequently, traditional market analysis that ignores these digital signals fails to capture the nuances of modern consumer behavior.

A significant research gap exists in the methodology used to assess these market dynamics. Most existing studies on halal cosmetics rely on self-reported survey data, which is frequently compromised by social desirability bias, where respondents answer according to religious expectations rather than actual behavior. There is a critical need for an objective approach to measure genuine public interest. Contemporary research suggests that big data analytics through platforms like Google Trends offer a solution by providing longitudinal, real-time insights into actual search volumes, offering a more transparent reflection of consumer interest than traditional self-reporting instruments (Silva et al., 2019).

This study aims to bridge this gap by analyzing and comparing the dynamics of consumer interest in Indonesia between halal-certified cosmetics and K-Beauty products through a digital search trend analysis. By utilizing secondary data from Google Trends, this research seeks to map the competitive fluctuations and identify whether religious-led regulations or global-led trends dominate the digital discourse. The findings will provide essential strategic insights for policymakers and industry stakeholders to navigate the

increasingly digitalized and ethically-conscious Indonesian beauty market insights for regulators and industry players in aligning mandatory halal requirements with the dynamic, digital-driven preferences of modern consumers.

REVIEW OF LITERATURE

The Evolution of Customer Value

Contemporary marketing management has transitioned toward a holistic discipline that seeks to build profitable relationships by creating superior value (Kotler & Keller, 2022). This evolution has culminated in Marketing 5.0, where the integration of Big Data and human-centered strategies addresses the needs of an increasingly fragmented market. In this framework, the traditional marketing mix has expanded to include “Purpose,” emphasizing ethical responsibility and sustainability as core value drivers. This paradigm shift provides a conceptual bridge to the Indonesian market, where a PESTEL analysis reveals a complex interplay of forces. Politically and Legally, Government Regulation (PP) No. 42 of 2024 has transformed halal certification into a mandatory market standard, strengthening domestic legal protections (Pramusita, 2021). Socio-culturally, the market is defined by a dichotomy between the rising “Halal Lifestyle” and the global influence of the “Hallyu Wave” (Andriani & Setiawan, 2020). Technological advancements now allow these macro-trends to be analyzed through digital footprints, facilitating a move toward hyper-personalization and data-driven strategy.

Halalan Thayyiban in Islamic Marketing

The preference for Halal products is conceptually rooted in the principle of Halalan Thayyiban (permissible and wholesome). As derived from Sharia principles, this concept requires products to be free from prohibited substances while simultaneously ensuring they are safe, high-quality, and beneficial for human use (American Halal Foundation, 2025). Within the framework of Islamic Marketing, these principles move beyond mere religious symbols to become indicators of “Value-Maximization” and societal welfare. In this context, Halal certification functions as a strategic mechanism to build “Brand Trust” and perceived quality, as Muslim consumers view the use of such products as an act of religious observance and an assurance of ingredient safety (Mardianto et al., 2025).

K-Beauty Phenomenon

The Indonesian beauty landscape is significantly shaped by the “Hallyu Wave,” which has established South Korea’s “K-Beauty” as a dominant global standard. This phenomenon leverages “soft power” to export not just products, but cultural aspirations and beauty ideals—most notably the “glass skin” aesthetic (Pramusita, 2021). The success of K-Beauty is attributed to continuous innovation in formulations and the use of digital marketing strategies that resonate with a “digital-savvy” audience (Credence Research, 2023). However, a conceptual conflict often arises between the adoption of these global trends and local religious values. For many Muslim consumers, even the most innovative global products are subjected to a “Halal awareness” filter, where the lack of clear certification can act as a significant barrier to purchase (Habibie et al., 2019; Syahputra & Mutiara, 2018). This interaction between religious values and global aesthetics forms the basis for comparing ‘halal’ and ‘Korean’ beauty trends.

Theory of Planned Behavior

Consumer behavior in the digital era is characterized by non-linear journeys across various social and technological touchpoints (Kumo, 2023). Central to this behavior is the concept of revealed preference, where digital footprints (such as search queries) provide a more accurate reflection of real-time intent than traditional “stated preference” surveys (Chakravarty & Sarma, 2022). This digital behavior is grounded in the Theory of Planned Behavior (TPB), which posits that intention is driven by attitude, subjective norms, and perceived behavioral control (Ajzen, 1991). In the context of halal cosmetics, factors such as religiosity and awareness of Jaminan Produk Halal (JPH) strengthen behavioral intentions, which are then manifested as search activities (Linarti & Ulfa, 2021).

Within the 5A customer journey (Aware, Appeal, Ask, Act, Advocate), the “Ask” stage represents the critical Zero Moment of Truth (ZMOT) where consumers actively compare halal and Korean alternatives (Kotler & Keller, 2022). This study utilizes the slope of search interest as a longitudinal measure of these intentions. A stable or positive slope indicates resilient behavioral interest, reflecting how spiritual and ethical determinants sustain consumer preference even amidst fluctuating global trends.

Segmenting, Targeting, and Positioning Strategy

To translate these behavioral insights into actionable strategy, the Segmenting, Targeting, and Positioning (STP) framework is employed (Asy'ari & Winarno, 2025). Segmenting involves dividing the broad Indonesian market into homogenous geographic clusters to identify localized needs (Putra & Sismanto, 2021). This facilitates effective Targeting and Positioning, ensuring that a brand's unique identity occupies a specific space in the consumer's mind (Kotler & Keller, 2022). In market research, this positioning is visually captured through Perceptual Mapping, a technique that illustrates consumer perceptions of product categories within a defined multi-dimensional space (Schiffman & Wisenblit, 2019). By applying Quadrant Analysis, this research categorizes Indonesian provinces into four strategic archetypes: Hybrid, Trend-Driven, Low-Involvement, and Conscious markets. This spatial segmentation allows for a more disciplined and data-driven approach to marketing, helping organizations understand which regions demand a halal-centric narrative versus those more receptive to global K-Beauty trends (Rohmah et al., 2025). This integration of temporal slope parameters and spatial quadrant mapping provides a robust foundation for optimizing marketing communications in Indonesia's diverse and dynamic digital economy.

RESEARCH METHOD

This research adopts a quantitative methodological framework utilizing a descriptive-comparative design to examine the digital manifestations of consumer preferences via Big Data analytics. The empirical data are derived from Google Trends, serving as a secondary longitudinal source of Relative Search Volume (RSV) indices. The temporal scope of the study encompasses a five-year observation window, spanning from October 2020 to October 2025, localized to the Indonesian geographical domain. Data acquisition involved the systematic extraction of query-based interest for four strategic keyword clusters: “*kosmetik* halal,” “*skincare* halal,” “*kosmetik* Korea,” and “*skincare* Korea.” These keywords function

as operational proxies to evaluate the competition between value-based religious considerations and global aesthetic trends.

The analytical procedure follows a bifurcated approach, integrating both temporal and spatial dimensions to ensure a comprehensive market synthesis. In the initial phase, trend dynamics and growth trajectories are quantified through linear regression slope calculations executed within the Orange Data Mining environment. Grounded in the Theory of Planned Behavior (TPB), these slope parameters serve as longitudinal indicators of behavioral intent stability, where the rate of change in search intensity reflects the persistence or volatility of consumer interest.

Subsequently, the study applies the Segmenting, Targeting, and Positioning (STP) framework through Quadrant Analysis, operationalized via Perceptual Mapping in Microsoft Excel. By mapping regional search intensities across 34 Indonesian provinces, the methodology categorizes geographic segments into four distinct market archetypes: Hybrid, Trend-Driven, Low-Involvement, and Conscious. This synthesis of temporal slope parameters and spatial quadrant mapping provides a rigorous empirical foundation for identifying localized demand patterns and optimizing marketing strategies across Indonesia's diverse digital landscape.

RESULTS AND DISCUSSION

Digital Demand Dynamics of Halal and Korean Beauty Products

This study analyzes digital consumer interest in Halal and Korean beauty products using Relative Search Volume (RSV) data as a proxy for pre-purchase demand at the zero moment of truth. Figure 1 illustrates the comparative time-series trends, revealing structurally different demand dynamics between value-based and trend-based product categories.

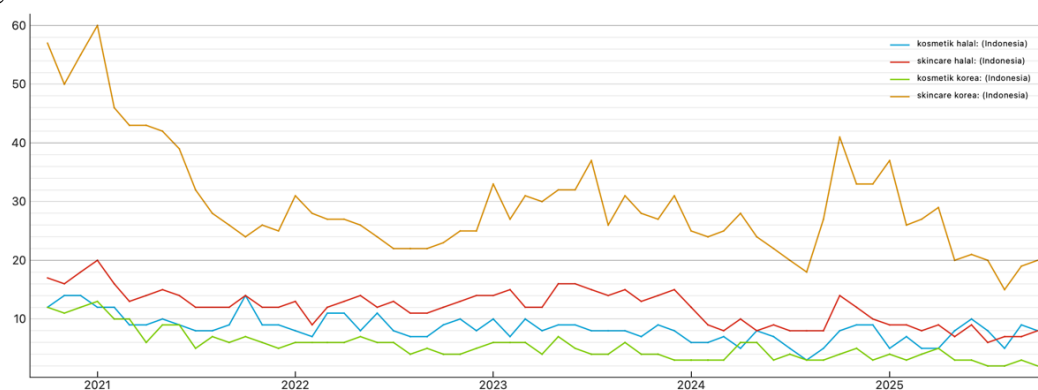


Figure 1.

Comparative Trends of Halal and Korean Beauty Product Searches

Source: Google Trends, processed by the author using Orange Data Mining (2026)

The Korean category displays a classic hype-driven diffusion pattern, characterized by an early surge followed by a rapid decline. In contrast, Halal-related searches remain comparatively stable despite lower peak intensity. This divergence suggests that Halal products benefit from demand anchored in structural values; religious compliance, perceived safety, and regulatory assurance, rather than transient aesthetic appeal.

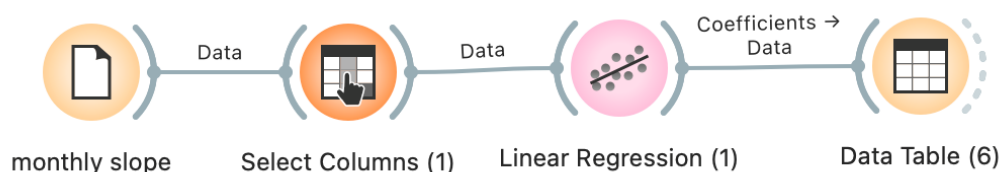


Figure 2.
Modelling Linear Regression

Source: Processed by the author using Orange Data Mining (2026)

To quantify these dynamics, linear trend slopes were estimated for the RSV data of each keyword category using the Linear Regression widget in Orange Data Mining. The slope coefficients obtained from the regression model, as illustrated in Figure 2, represent the average monthly rate of change in digital demand and serve as a proxy for changes in public interest over time.

Table 1.
Trend Slopes of Halal and Korean Beauty Categories

Category	Monthly Slope
Halal Cosmetics	-0.07985
Halal Skincare	-0.12507
Korean Cosmetics	-0.11544
Korean Skincare	-0.31296

Source: Google Trends, processed by the author using Orange Data Mining (2026)

Halal cosmetics exhibit the flattest slope at -0.08, indicating the strongest demand retention over time. In contrast, Korean skincare shows a decline rate more than three times steeper (-0.31), confirming its vulnerability to rapid saturation. When aggregated, the Halal category records an average slope of -0.10, while the Korean category declines at -0.21, implying that Halal-related digital demand deteriorates at less than half the speed of its Korean counterpart. Econometrically, this gap reflects superior demand resilience in Halal-oriented markets.

Value-Based Demand Resilience in Sharia Economics

From a Sharia economics perspective, the stability of Halal-related searches aligns with the principle of *halalan tayyiban*, where permissibility, safety, and quality form the core of consumption utility. Digital searches for Halal products are predominantly informational and verification-oriented, focused on ingredients, certification, and compliance, leading to lower volatility relative to fashion- or trend-based searches.

Within the Theory of Planned Behavior framework, subjective norms reinforced by religious awareness and mandatory Halal certification function as persistent behavioral constraints. The institutionalization of Halal certification in Indonesia transforms Halal compliance from a differentiating signal into a market baseline, thereby stabilizing consumer expectations and search behavior. This finding extends prior Islamic marketing studies by demonstrating that Halal values influence not only purchase intention but also the temporal structure of digital demand.

In contrast, Korean beauty products rely heavily on extrinsic drivers such as visual trends, celebrity endorsement, and fear of missing out. These drivers generate rapid attention accumulation but lack long-term anchoring mechanisms. As aesthetic novelty diffuses and marginal utility diminishes, digital demand contracts sharply, particularly in the skincare segment where functional differentiation becomes easily replicable.

Substitution Effects and Market Internalization

The sharp decline in Korean-category RSV does not imply a contraction of K-beauty influence. Rather, it reflects a substitution effect driven by successful imitation and localization by domestic producers. Indonesian brands increasingly replicate Korean formulations, textures, and packaging while simultaneously offering Halal certification and competitive pricing (Hadiwidjaja, 2025). As a result, consumers obtain equivalent functional and symbolic benefits without relying on imported brands or Korean-specific search terms.

From a marketing economics standpoint, this represents a reduction in search costs and a reallocation of consumer attention toward domestically branded Halal alternatives. Consequently, declining RSV for Korean keywords indicates market internalization rather than declining category relevance. Halal thus operates as a value-based differentiator that accelerates substitution away from trend-dependent imports.

Regional Market Segmentation

Figure 3 presents a perceptual mapping of provincial RSV scores, revealing four distinct regional clusters based on relative preference for Halal and Korean beauty products.

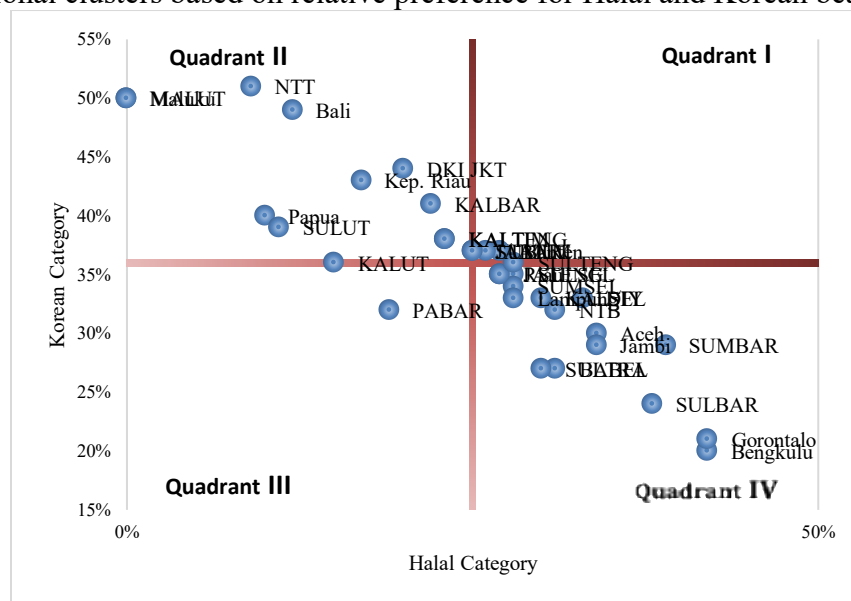


Figure 3.
Perceptual Mapping of Provincial Preferences
Source: Processed by the author using Microsoft Excel (2026)

The emergence of these clusters provides strong empirical evidence that the Indonesian beauty market is structurally heterogeneous, thereby rejecting the assumption of a uniform national demand pattern. These findings are consistent with consumer subculture theory, which posits that consumption behavior is shaped by local cultural norms, religiosity, and socio-economic context (Kotler & Keller, 2022). From an Islamic marketing perspective,

the results confirm that Halal sensitivity varies spatially and interacts with exposure to global popular culture, digital infrastructure, and demographic composition.

Quadrant I: Hybrid Market

Table 2.
Provincial Profile of the Hybrid Market Cluster

Province	Halal RSV	Korean RSV
Banten	27%	37%
Jawa Barat	25%	37%
Jawa Timur	26%	37%
Sumatera Utara	25%	37%
Sulawesi Tengah	28%	36%

Source: Google Trends, processed by the author (2026)

Provinces in this quadrant exhibit above-average interest in both Halal and Korean beauty products, indicating a dual-orientation consumption pattern. Consumers in this cluster actively engage with global beauty trends while simultaneously maintaining sensitivity toward Halal compliance. This configuration reflects a modern–religious or bicultural consumer identity, particularly prevalent in urban and peri-urban regions with high internet penetration and a dominant Gen Z and Millennial population (APJII, 2025).

From a behavioral perspective, Halal functions as a conditional constraint rather than a substitute for innovation. Consistent with the Theory of Planned Behavior, religious norms operate as perceived behavioral control, shaping acceptable choice sets without suppressing trend adoption. This finding empirically supports the concept of halal innovation, whereby global aesthetics can be successfully internalized within a Sharia-compliant framework (Mahri et al., n.d.). For marketers, this segment represents the most competitive market structure. Brands must simultaneously communicate functional efficacy, trend relevance, and Halal credibility. Failure in any dimension risks rapid substitution, given the high information accessibility and comparison behavior characteristic of this cluster.

Quadrant II: Trend-Driven Market

Table 3.
Provincial Profile of the Trend-Driven Market Cluster

Province	Halal RSV	Korean RSV
Bali	12%	49%
Nusa Tenggara Timur	9%	51%
Maluku	0%	50%
Maluku Utara	0%	50%
DKI Jakarta	20%	44%
Kepulauan Riau	17%	43%
Kalimantan Barat	22%	41%
Papua	10%	40%
Sulawesi Utara	11%	39%
Kalimantan Timur	23%	38%
Kalimantan Tengah	23%	38%

Kalimantan Utara	15%	36%
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Source: Google Trends, processed by the author (2026)

This cluster is characterized by a strong dominance of Korean beauty searches and relatively low Halal-related interest. The regions included are either highly cosmopolitan urban centers or culturally heterogeneous and tourism-oriented areas. In these markets, aesthetic appeal, brand image, and influencer endorsement exert greater influence than religious certification.

Empirically, this pattern aligns with prior findings that Halal knowledge does not significantly moderate purchase decisions for Korean skincare products in environments where popular culture exposure is high (Hadiwidjaja, 2025). Digital demand in this cluster is largely driven by extrinsic cues such as celebrity endorsement, visual trends, and lifestyle signaling, resulting in higher volatility and shorter demand cycles.

From a marketing economics perspective, this segment is characterized by high responsiveness but low persistence. While demand can be rapidly stimulated through promotional intensity, it is also prone to rapid decay once novelty diminishes. Halal certification, although not irrelevant, functions primarily as a secondary attribute rather than a primary decision driver.

Quadrant III: Low-Involvement Market

Table 4.
Provincial Profile of the Low-Involvement Market Cluster

Province	Halal RSV	Korean RSV
Papua Barat	19%	32%

Source: Google Trends, processed by the author (2026)

This cluster exhibits below-average interest in both Halal and Korean beauty categories. The low engagement reflects structural constraints rather than preference rejection. Limited digital infrastructure, lower income levels, and reduced market maturity restrict consumer involvement in symbolic or value-based product evaluation.

Consistent with prior consumer behavior studies, low-involvement markets prioritize functional utility over brand symbolism or ethical attributes (Francescucci et al., 2023). Beauty consumption in this context is utilitarian, and digital search behavior remains shallow. From a Sharia economics standpoint, the low Halal RSV does not imply low religiosity, but rather limited informational engagement. This segment represents latent demand potential that may expand as internet penetration, education, and purchasing power improve.

Quadrant IV: Conscious Market

Table 5.
Provincial Profile of the Conscious Market Cluster

Province	Halal RSV	Korean RSV
Aceh	34%	30%
Sumatera Barat	39%	29%
Bengkulu	42%	20%
Gorontalo	42%	21%
Sulawesi Barat	38%	24%

Province	Halal RSV	Korean RSV
Jambi	34%	29%
Nusa Tenggara Barat	31%	32%
Bangka Belitung	31%	27%
Kalimantan Selatan	30%	33%
Sulawesi Tenggara	30%	27%
Sumatera Selatan	28%	34%
Lampung	28%	33%
Sulawesi Selatan	28%	35%
Riau	27%	35%
Jawa Tengah	27%	35%
D.I. Yogyakarta	33%	33%

Source: Google Trends, processed by the author (2026)

This cluster records the highest Halal-related search intensity and below-average interest in Korean beauty products. These regions are characterized by strong religious norms, where Halal compliance constitutes a non-negotiable market entry condition. In such contexts, Halal labeling functions not as a differentiating attribute but as a minimum requirement for consumer acceptance. The findings corroborate earlier studies indicating that in highly religious regions, Halal certification significantly shapes consumer trust, perceived safety, and purchase legitimacy (Ningsih et al., 2025).

Several provinces classified within the Conscious Market, including South Kalimantan, South Sumatra, Central Java, Riau, and Lampung are positioned in this quadrant due to relative preference dominance rather than the absence of Korean beauty interest. While Korean-related RSV remains positive, it does not exceed the national mean (36%), whereas Halal-related RSV consistently surpasses the 25% threshold, indicating a stable hierarchy in consumer preference ordering. A comparable transitional structure is observed in the Special Region of Yogyakarta, where Halal and Korean RSV levels are numerically equal (33%), yet the province remains statistically assigned to this quadrant because Korean interest does not achieve relative dominance. These patterns suggest that religiosity operates as a structural constraint that conditions, rather than excludes, trend adoption, thereby anchoring digital demand and limiting the displacement effects of global aesthetic cycles.

Economically, this segment exhibits high demand persistence and low elasticity to trends. While growth rates may be gradual, demand stability is strong, making the segment strategically important for long-term market sustainability within Islamic finance and Halal industry ecosystems.

CONCLUSION

This study examines the competitive dynamics between Halal value based and Korean trend-based beauty products in Indonesia using Google Trends data as a proxy for digital consumer demand. The empirical findings indicate that Halal beauty products exhibit markedly greater demand stability and temporal persistence, while Korean beauty products, particularly within the skincare category, are characterized by pronounced volatility and demand contraction following peak popularity. These results suggest that Halal attributes have transcended their traditional role as indicators of religious compliance and have become

a baseline determinant of consumer demand associated with perceived safety, quality assurance, and sustained market relevance.

From a theoretical standpoint, this study contributes to the literature on consumer behavior and Islamic marketing by demonstrating that value-based attributes operate as structural anchors within digital demand systems. Consistent with the Theory of Planned Behavior, religiosity and institutionalized regulatory frameworks enhance preference stability and condition the diffusion of global beauty trends. Rather than functioning as direct substitutes, trend-based attributes are mediated by Halal values, resulting in an asymmetric interaction between global aesthetic influences and locally embedded normative structures.

The findings further confirm substantial regional heterogeneity within Indonesia's beauty market. The quadrant-based segmentation reveals distinct geospatial demand regimes, ranging from hybrid markets that integrate global aesthetics with Halal integrity to conscious markets in which value consistency dominates consumer decision making. This spatially differentiated analysis extends conventional market segmentation approaches by incorporating digital trace data to capture regional variations in consumer interest more accurately.

In practical terms, the results indicate that cosmetic firms should adopt hybrid positioning strategies that combine trend-oriented product innovation with Halal certification as a long-term mechanism for trust formation, supported by regionally differentiated marketing strategies. From a policy perspective, the reinforcement of the national Halal ecosystem as a universal standard of product safety and quality, beyond its religious dimension, remains critical for sustaining industry development. Future research should integrate mixed methods approaches and transactional data to validate digital demand indicators and to further elucidate the behavioral mechanisms underlying the interaction between value-based and trend-driven consumption.

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