BEAUTY IN LOWER TIER CITIES - CHINA - 2023

Consumers in lower tier cities have a positive attitude towards emerging skincare concepts (eg the skin barrier), and are willing to change their skincare routine with guidance. Brands need to invest in long-term brand awareness and a professional image, impressing consumers in the lower tier market with all-round authenticity in terms of service, product efficacy and brand reputation.

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Report Content

MARKET FACTORS

INTERVIEWS WITH INDUSTRY EXPERTS

THE CONSUMER

Functional skincare: consumers are cautious when trying and rational when being influenced

- Consumers show a natural sense of trust in well-known brands
- Professional background is a key element in creating a brand effect
  - Graph 16: selection factors of function-driven brands, by age, 2022
- Consumers are rational when being recommended function-driven products, and only convinced by first-hand experience
- KOCs and the private domain are of great help for brands expanding into lower tier markets
- Comprehensive and authentic product introductions help in reaching a wider audience
- Judgement of benefits requires support from quantitative results
- For high-efficacy products, having rapid effects is not an advantage, but a cause for concern
- Consumers have a superficial understanding of the skin repair concept, and have not yet formed long-term usage habits

Premiumisation of national brands: significant progress, but effort still needed

- The image of national brands sees a comprehensive improvement
- The pricing of domestic brands is close to consumers' upper limit, and gaining a foothold requires improvements in product performance within the price range
- Brand effect and product details are both important
- Brands with an edge in managing skin conditions have a greater potential for premiumisation
- Safety is a must for prestige brands
  - Graph 17: desired values from prestige skincare brands, by age, 2023

Barriers to cosmetic surgery: consumers encounter obstacles in experimenting, and are more inclined towards safety

- Respecting the laws of nature and embracing ageing with an open mind
- Consumers lack understanding of post-operative recovery and worry about maintenance following surgery
- Beauty devices and services become a safe bet for anti-ageing in lower tier cities
  - Graph 18: reasons for using beauty services, by age, 2023

APPENDIX

Abbreviations

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