Beauty & Skin Care Consumption Features of Women

in China's First- and Second-tier Cities

By Ipsos

With the awakening of fine living and fashion consciousness, Chinese female consumers' demand for skin care and beauty develops constantly. What kind of skin care and beauty demand do they have? What are the features of their product function demand? Recently, Ipsos has conducted a survey among 600 Chinese female consumers in China's first- and second-tier cities to analyze and disclose female consumers' beauty & skin care consumption features and trends.

No. 1

There is an obvious demand for skincare product segmentation

With the rising of fine living and skin care consciousness, Chinese female consumers are paying more attention to the effectiveness of skin care products. While with the development of skin care product experience and knowledge, the "full effect" products solving multiple problems simultaneously are often difficult to earn their trust, and the specialized products addressing a specific problem are more attractive to them.

The survey shows that 67% of female respondents express a preference for the use of highly specialized skin care products that can solve specific problems. The respondents with higher household income are more inclined to use highly specialized skin care products; among them, up to 80% of respondents with a monthly household income of 20,000 CNY and above make such a point, which is significantly higher than other consumers.

I inclined to use highly specialized skin care products that can addressing specific problems by monthly household income of respondents

Less than 10,000 CNY	50%
10,001 - 15,000 CNY	64%
15,001 - 20,000 CNY	67%
20,000 CNY +	80%

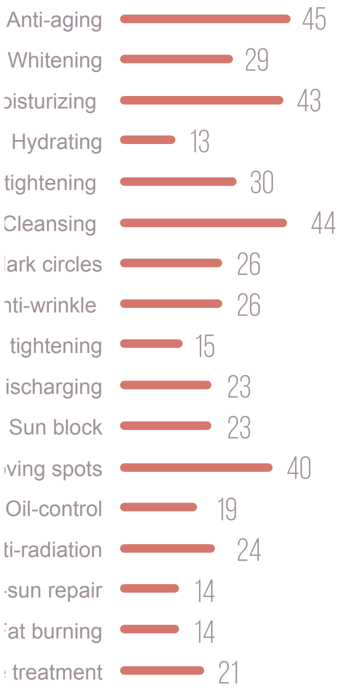
As for product category, the survey shows that mask (71%), toner (70%) and cleanser (68%) are the most important products used by female consumers; meanwhile, the lotion (59%), essence (56%), moisturizer (56%), eye cream (54%), sunscreen (53%) and face cream (50%) are also the products with a relatively strong demand.

As for product functions, the consumers have different demands for skin care products and think highly of product segmentation. The survey shows that moisturizing, hydrating, whitening and cleansing are the most valued product functions to consumers; meanwhile, the functions of sun block, anti-aging effect and pore tightening are also cared about.

Skin Care Product Currently Used - Female

Mask	71%
Toner	70%
Cleanser/Cleansing gel	68%
Lotion	59%
Essence	56%
Moisture cream	56%
Eye cream	54%
Sunscreen	53%
Cream (for both day and night use)	50%
BB cream	44%
Moisturizing cream	40%
Night cream	38%
Day cream	38%
Facial scrub	17%
Neck cream	13%

Functions of Skin Care Products Respondents Plan to Increase Investment in - Female



No. 2

It shows a sustained growth of investment in skin care products and demand for anti-aging

The deterioration of air quality in China's first- and second-tier cities makes women pay more attention to skin care. The survey shows that over three-quarters of female respondents indicate that they will increase investment in skin care products next year. At the same, the survey finds that the female respondents aged 20-30 show a strongest willingness to invest more (82%), which is higher than those aged 31-40 (78%) and 41-50 (63%).

Meanwhile, driven by the concept of fine living, Chinese female consumers are not satisfied with basic skin care. They begin to pursue "agelessness" and "inverse growth" and forever young becomes the ultimate goal of female consumers. The survey shows that consumers want to increase investment in anti-aging products most and 45% of female respondents indicate they will increase investment in anti-aging next year; among them, the female respondents aged 30-41 show a strongest willingness to invest in anti-aging (51%), followed by those aged 41-50 (45%).

No. 3

The green organic market witnesses a strong demand

In recent years, with industry incidents coming out one after the other, safe skin care products "returning to original nature" are becoming a fashion, and Chinese female consumers' concern of cosmetics begins to shift from simple product effectiveness to product safety and naturalness. Meanwhile, driven by the concept of global going green and environmental protection campaign, the concept of green organic living is affecting a growing number of Chinese female consumers, and mild green natural skin care products will become a trend of skin care products consumption in the future. The survey shows that 72% of female respondents indicate that they must know the composition of skin care products prior to using them. 74% of female respondents indicate that they are more inclined to use skin care products with natural and organic ingredients, even if they are much higher than common ones in price; and the respondents with higher monthly household income have a stronger demand for skin care products with natural and organic ingredients.

I am more inclined to use skin care products with natural and organic ingredients, **even if they are much higher** than common ones in price

No. 4

Strong Brand Awareness

The survey shows that a quarter of female respondents may accept skin care products priced at more than 2,000 CNY; the survey shows that over half (53%) female respondents indicate that they place more trust in foreign brands compared to domestic brands; 56% indicate they have more confidence in luxury brand skin-care products; and over six out of ten (63%) indicate that they believe the more expensive skin care products, the better effectiveness.

The reason why consumers prefer foreign brands and luxury brands is that, on the one hand, the enhancement of consumption pattern and safety awareness among Chinese female consumers make them pay more attention to products' "quality". Product price is no longer the factor female consumers caring about most; compared to the weaker domestic brands, they would rather choose higher-priced foreign brands.On the other hand, women are "emotional beings", they are not only concerned about the quality of products, but more inclined to choose the brands being able to strike a chord with them emotionally and mentally, and there is still a large gap between the domestic and foreign cosmetics brands in brand building and emotion marketing.

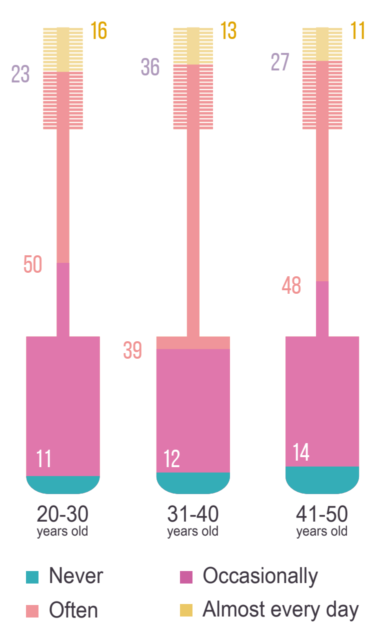
No. 5

Women aged 31-40 have the strongest demand for makeup

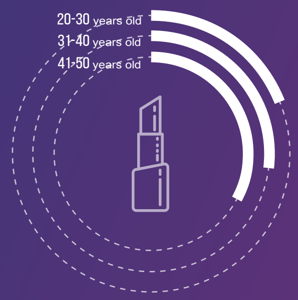
The survey shows that nearly half (49%) female respondents aged 31-40 indicate that they put on make-up often/almost every day, which is significantly higher than the respondents aged 20-30 (39%) and 41-50 (38%). As for the consciousness of makeup, Chinese female consumers have taken makeup as a basic etiquette and way of life. The survey shows that eighty percent (79%) female respondents think that cosmetics/skin care products are part of a woman's self-image; 74% believe that going out with makeup is an active lifestyle; over sixty percent (64%) believe that going out with makeup is an expression of respect for others.

Meanwhile, the survey finds that female respondents aged 31-40 are higher than those aged 20-30 and 41-50 in sense and consideration of makeup. On the one hand, the attitude to "agelessness" and living young makes female consumers aged 31-40 pay more attention to investment in their own makeup; on the other hand, more frequent meetings at work and social gathering make women in this age group pay more attention to their own makeup improvement.

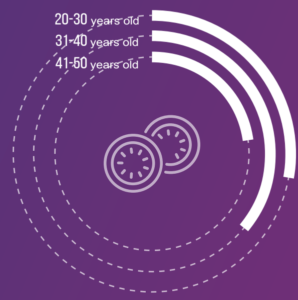
Normal Makeup Frequency – Female



Woman going out with makeup is
an expression of respect for others – female
- Totally agree (%)



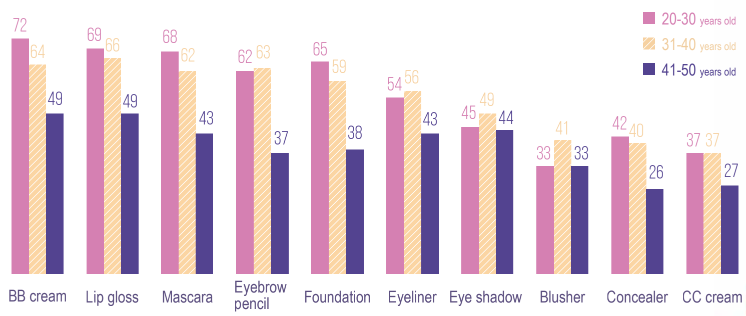
Woman going out with makeup is
an active lifestyle – female
- Totally agree (%)



Cosmetics/skin care products
are part of a woman's self-image
– female

As for the product demand

The demand of female consumers aged 31-40 for eyebrow pencil (63%), eyeliner (56%), eye shadow (49%) and blusher (41%) is even higher than those aged 20-30; The demands of female consumers aged 31-40 and 20-30 for other categories of product are very close.



No. 6

It shows a high degree of acceptance to plastics

According to this survey, 43% of female respondents indicate that they are not satisfied with their appearance. It shows that currently 15% of female respondents indicate that they have undergone plastic or micro plastic surgery. While among those having not undergone plastic/micro plastic surgery, 36% indicate that they will consider plastic/micro plastic surgery in the future.

Judging from their household income, the higher the household income, the more intense will to plastic/micro plastic surgery in the future. The survey shows that 45% of female respondents with a monthly family income of more than 20,000 CNY having not undergone plastic/micro plastic surgery will consider plastic or micro plastic surgery in the future, which is significantly higher than other respondents.

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