



Beauty Consumers in Lower Tier Cities - China - December 2020

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This report looks at the following areas:

- Trusted BPC information channels
- Preferences and trust in online and offline purchase channels
- Opportunities within personal grooming routines
- Skincare knowledge of lower tier city females and ingredients-driven consumers
- Perceptions and preferences for skincare brand origins
- How at-home beauty devices can attract lower tier city consumers

'Lower tier markets' and 'suburban youths' have become buzzwords. This shows that the great potential of lower tier city consumers is being unleashed, amid a backdrop of economic development, information explosion and changes in consumers' life attitudes. In the BPC market, the usage of online and offline channels are on par with each other. Female consumers from lower tier cities are catching up with those in tier one cities; data shows their behaviours are similar to their tier one city counterparts in terms of product usage, information sources and purchase channels.

However, a considerable number of lower tier city consumers maintain some of their old habits and attitudes; they are still in a transition period. Apart from using similar strategies as in tier one cities to target sophisticated consumers in lower tier cities who are the swiftest to catch up, brands could also look at the wider consumer base and the greater opportunities within this 'mixed' group in transition. To tap into this group of consumers, brands need to understand their distinctive attributes compared to tier one city consumers. For example, they trust offline information sources and channels more; they have higher expectations for 'authentic' information; they have sophisticated personal grooming routines and a need for function upgrade; they might have a misunderstanding of popular skincare concepts and biases against some brand nationalities; they might also have expectations for beauty science and some barriers prevent them from embracing these technologies. Brands that quickly adjust their marketing strategies according to this information will be



"Although they widely use online information channels, lower tier city consumers have more trust in 'ordinary people'. They are active users of online shopping channels but have widespread distrust about the authenticity of products bought online."

– Anne Yin, Research Analyst

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able to reach more lower tier city females more effectively and stay ahead of their competitors.

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