Explore
Attitude-Behaviour Gap
of
Chinese Millennials
in Beauty Market

Final Fashion Management
Project

CONTENTS

Executive Summary

Chinese millennials demonstrate positive attitude towards sustainable consumption, however, the attitude and actual purchase behaviour are inconsistent. This report investigates sustainable consumption in Chinese beauty market and identifies the various reasons and factors that lead to millennial consumers' attitude-behaviour gap.

Part 1&2 are introduction and methodology, which provide the overview, rationale and research methods of this report.

Part 3 is detailed consumer analysis, including demographic analysis and consumer behaviour analysis in beauty market, and apply relevant theories and frameworks. The key point of this part is to explore consumer attitude towards sustainability and find out the gap between attitude and actual behaviour. Meanwhile, this part also involves analysis of the impact of COVID-19.

Part 4 is market analysis. This part focuses on scanning the macro environment of Chinese beauty market and identifies the factors lead to attitude-behaviour gap, It includes special beauty and skincare culture, social media and KOL influence, fast-moving beauty business environment and lack of education.

Part 5 is future strategy. This part presents new strategies according to the analysis in Part 3 and Part 4. It includes circular business model, advocates new beauty and skincare culture and slows down the current business environment.

Part 6 is conclusion. This part summarizes the report and draws conclusion of the report.

1.0 Introduction

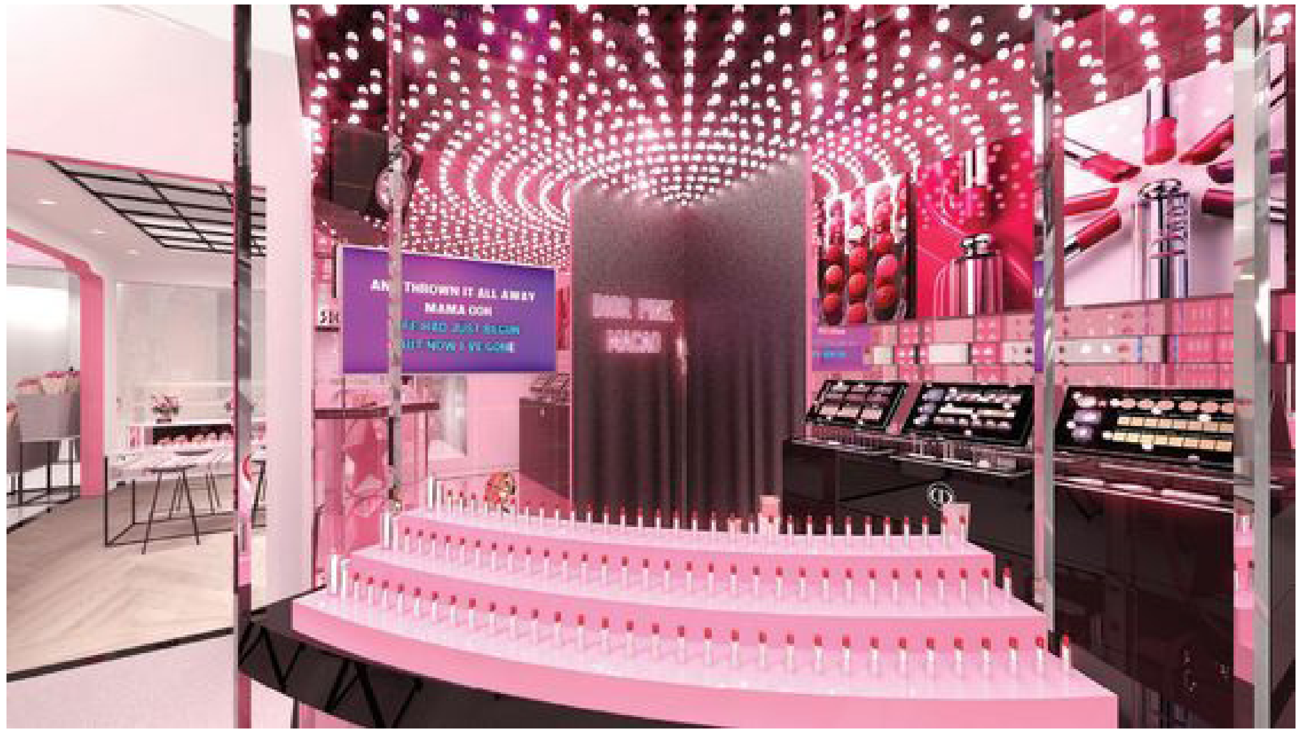

Figure 1: Dior Beauty Pop-up (Dior, 2019).

Chinese market has demonstrated rapid sales growth in beauty industry in recent years, which is expected to reach 60 trillion RMB by 2025 (Wu, 2019) (Business Wire, 2019). Emerging beauty brands still continually enter into Chinese market, meanwhile, taking advantage of optimizing marketing strategies, especially the power of social media and KOLs, which successfully arouse consumers burning desire to purchasing beauty products (Yu, 2019). As consumers with huge spending power, who contributed more than half the total sales of beauty products in the world second-largest beauty market (Euromonitor, 2019), Chinese millennial consumers have become the main driver of future beauty business development. According to Beauty Futures Report 2019, luxury beauty is booming in China, meanwhile, consumers expectation in beauty products become higher, including the increasing demand for speed, newness, packaging, and function, which lead traditional beauty brands business shift to fast beauty business model (LS:N Global, 2019).

However, these new business models lead to significant negative impact on the sustainability of environment and society. Data from Zero Waste Week shows that 120 billion units of plastics packaging are produced by beauty industry (Moore, 2019). Except for the over-purchasing the low-cost beauty, over-packaging of luxury beauty is also the factors causing the serious environmental issues (Sherriff, 2019), therefore, business model need to innovate immediately.

BOF & McKinsey (2019) emphasizes the importance of sustainability in The State of Fashion 2020, meanwhile, Chinese millennials are getting woke, who have more concerns on environment and social issues (Zheng, 2019). Particularly, under the influence of COVID-19, Chinese consumer aware that sustainability is no longer an option, leading the shift of purchasing behaviour (Lim, 2020). As a response, leading brands focus on a more sustainable business model, including providing more green products and services to meet increasing demand (Buchanan, 2020). However, sales of sustainable products are not in a growing trend, along with low market share in Chinese beauty market, in other word, despite consumers have positive attitude in terms of sustainable consumption, this attitude fail to shift to actual purchasing behaviour (White et al., 2019). This can be defined as attitude-behaviour gap (Park and Lin, 2018), which can be considered as the biggest threats and barriers to achieving sustainable development in beauty industry, therefore, it is necessary to identify factors causing the gap to developing specific strategies.

This report aims to explore Chinese millennial consumers attitude-behaviour gap in sustainable consumption in beauty industry. Comprehensive analysis in millennial consumers and current situation in beauty market will be conducted to investigate main factors that affect consumers purchasing intention, attitude and behaviour, and identify the barriers of the shift from positive attitude to actual purchase behaviour, meanwhile, finding out the challenges and opportunities for future development. This report will also include future strategies, involving consumer education and business model innovation, aiming to bridge the attitude-behaviour gap and build a sustainable business model.

2.0 Methodology

Affecting by COVID-19, the results of the primary research is not ideal, therefore, this report was based on systematic literature review and comprehensive secondary research.

1.Websites

Websites resources, such as LS: N Global and Business of fashion were the most important part in this report, which provides comprehensive and professional information in macro and micro trends in beauty industry, including consumer attitudes towards sustainable consumption and innovative business model. Due to this report focused on Chinese market, therefore, the research also included Chinese fashion business press, such as Jing Daily and China Daily, which provides more specific information to support the in-depth analysis of China beauty industry. Database websites, such as Mintel and Euromonitor provided reliable secondary data. Comparing with primary data, the secondary data are collected by professional researchers and teams, which are more efficient, accurate, with less cost-effectiveness (Walliman, 2018). In addition, in terms of the impact of COVID-19, websites resources also provided the latest dynamics and trends, especially consumer shifts, which give the direction for future strategy.

2.Academic Journals and Published Books

Academic journals and published books were mainly used to support the analysis of consumer attitude and behaviour in sustainable consumption. Scopus, Emerald group publishing and Science Direct databases were used for research, and research keywords were consumer purchasing behaviour, consumer attitude, consumer decision-making, consumers purchasing intention, sustainable consumption and attitude-behaviour gap, combining with keywords: millennials, Chinese market and beauty industry.

3.0
Chinese Millennials In Beauty Market

Chinese Millennial Consumer

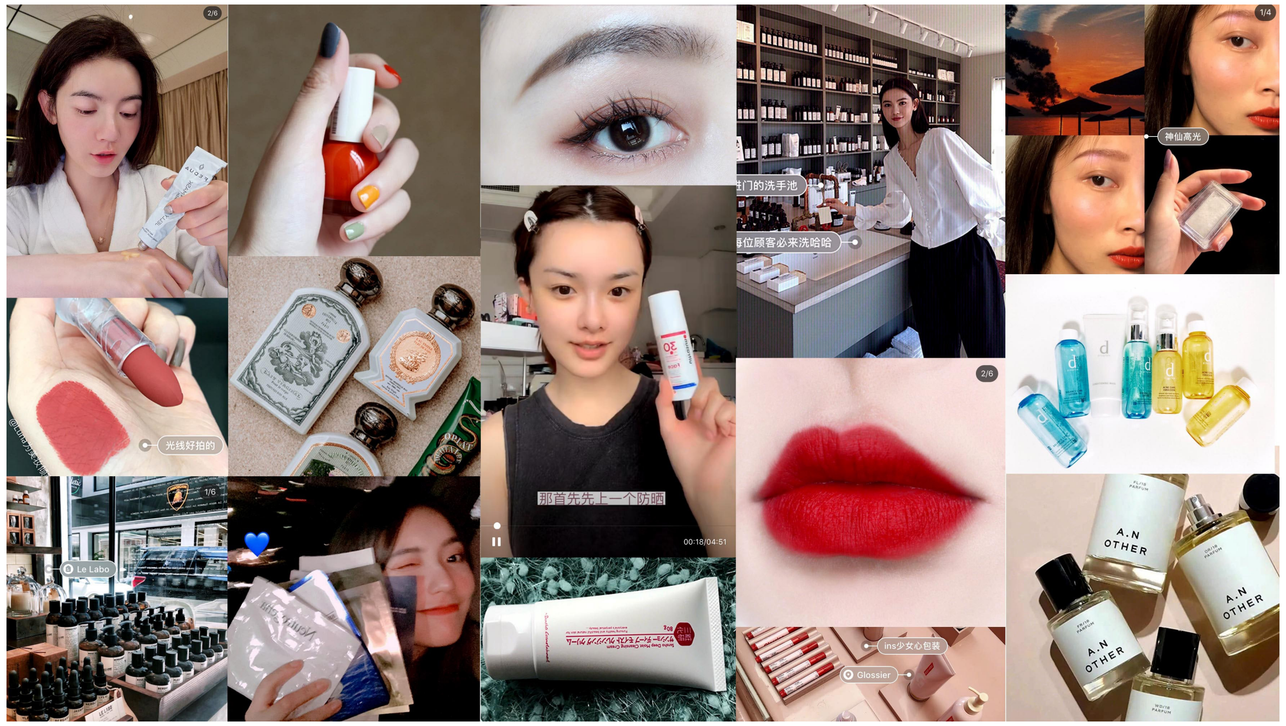

Figure 2: Chinese Beauty Consumer (Hall, 2019).

Chinese millennials were born between 1981 and 1996, who account for over one-fourth of China's population(Yuan, 2019), meanwhile, according to LS:N Global, this consumer group drives 65% of Chinese total consumption growth and contributes over RMB518bn (£58bn) in 2018 in beauty market (Withycombe and Bishop, 2019). For a long time, First-tier City in China is the main drive force of sales growth in beauty market, however, the report points out that sales in Second-tier City show obvious growth (Hall, 2020), which provide new market opportunities for beauty brands. Considering the large population with such strong spending power, beauty brands has realized the importance of Chinese millennials consumer, who are highly influential and might drive future development in beauty industry (Blazyte, 2020).

Affected by the One-Child Policy (begin from 1979) (Wang, 2017), Chinese millennials have more pressure from society and represent totally different consumer attitude and behaviour from other consumers who are not only other generations in China but also millennials group in other countries (Wang, 2018). Therefore, brands need to pay more attention to the most special generation. Chinese millennials experience China's economic reforms and rapid development (Kidwai, 2019), which forms the increasing consumption culture, and broaden the view on status and value (Suen and Hall, 2019). Meanwhile, their parents afford most of the expenses (education and living) to reduce the economic pressure. Therefore, millennial consumers have higher disposable personal income, who are more generous with less price consciousness when they purchase (Luan et al.,

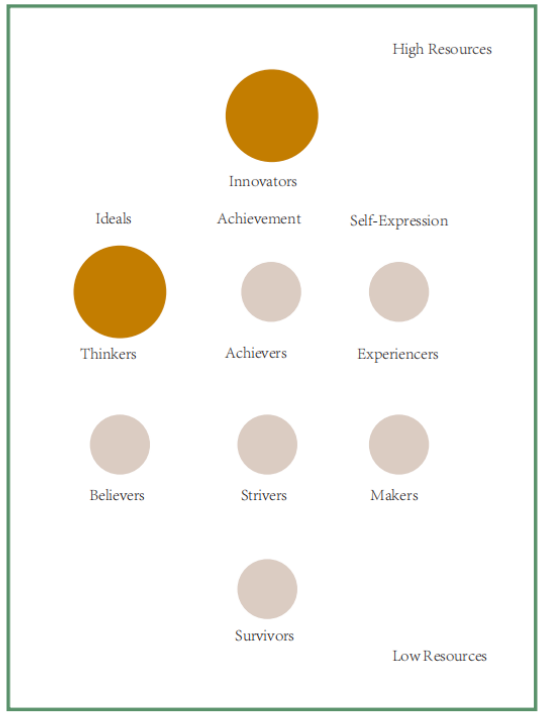

Figure 3:
VALs framework
(Zhou. 2020)(SBI, 2014).

2019), which provide opportunities for luxury beauty brands. Within the macro-environment in China, Chinese millennial consumers are considered as hedonism and individualism (Mckinsey & Company, 2019), which means this generation put self-fulfillment at first, seeking out more sophisticated lifestyles and demanding unique products to enhance happiness and personalization. As LS:N Global (2018) report that Chinese millennials consider makeup as self-expression, meanwhile, with high feminist consciousness, millennials support the belief with purchasing habits, therefore, they spend more on beauty products. In addition, compared with other generation, Chinese millennials also travel aboard more often, with 80% spending growth in 2018 (Kidwai, 2019), which not only provide opportunities to purchase different beauty products with different channels but also make them become open-minded, positive and optimism when facing new things. Therefore, Chinese millennial consumers can be considered as innovators and thinkers according to VALs (Figure 3).

Born in the period of rapid development of technology and digitization, millennial consumers are digitally-savvy and show increasing interests in innovation, with 92% Internet users and 73% online shoppers (Wang, 2018). As a generation who grow up in One-Child Policy without siblings, Chinese millennials extremely rely on social media, especially WeChat and Xiaohongshu, which can be considered as the channel for increasing communication (Tan and Hallanan, 2017), meanwhile, casuing certain impact on their behaviour and attitude. Through the Internet, millennials can have more information on brands and products easier, however, it also leads consumers to have increasing demand and higher expectation, with lower brand loyalty (Achim, 2019).

Sustainable Consumption in Beauty

BOF's report highlights the importance of sustainability (BOF & McKinsey, 2019), supported by Mintel, environmental sustainability is particularly important and become key trend in beauty industry, therefore, more and more brands provide greener beauty products (Mintel, 2020). As the leading e-commerce platforms in China, JD.com (2018) reported that Chinese consumers pay more attention to environmental issues, meanwhile, due to 70% consumers are aware that the environment can be directly impacted by personal purchasing behaviour, which increasing demand for sustainable products (Xinhua, 2017).

In Chinese beauty market, this consumer shift is evidenced by AlixPartners study, which 72% of all respondents stated that they recognized the importance of purchasing green products. Compared with other four surveyed nations, this figure reached to 90% of Chinese beauty consumers, who demonstrated more active attitude towards sustainable development (Houghton et al., 2019), meanwhile, 58% consumers said that green products can be paid more (Pan, 2019). Chinese millennials are considered as the consumer group of the highest environmental consciousness, who stated that they would pay 18% more if the products are eco-friendly, meanwhile, they also demand transparency of product ingredients (Masory, 2019). From beauty brands perspective, the consumer shift towards attitude and demand provide huge opportunities, which need to be put the heart of future business.

However, Mintel (2019) reported that the active attitude can not be turned into action. It is evidenced by another AlixPartners survey, compared with consumers who have positive attitude in environmental sustainable development, there are 11% fewer who actually purchase green beauty products (Rapp, 2019). The contradiction between active attitude and actual purchase behaviour can be defined as attitude-behavior gap (Park, and Lin, 2018), which can be considered as the biggest threat to achieve sustainable development in beauty industry. This is due to the gap not only reduces and limits consumers engagement in sustainability but also weakens the motivation for beauty brands which is still the startup in sustainable business. Attitude-behavior gap is pointed out that is caused by purchase inhibitors, therefore, it is necessary to identify the factors motivating and impeding sustainable (green) purchase through scanning macro and micro trends in the current beauty market, which can help brands to narrow the gap (Joshi and Rahman, 2015).

Figure 4: Beauty Over-consumption (Zhou, 2020).

The impact of COVID-19 on Consumers

Figure 5: Consumer in Sephora after COVID-19 (The New York Times, 2020).

Affected by COVID-19, it is obvious that Chinese consumer shift to patriotic consumerism (Luo, 2020). By June, this pandemic is still spreading globally with rapid growth, however, it has been well-controlled in China (McDonell, 2020). The well performance of Chinese government incites consumers' nationalist sentiments (Luo, 2020), therefore, consumers might tend to purchase C-beauty (domestic beauty brand). However, C-beauty is identified as one of the factors to lead negative environment issues (Analysis in Part 4), therefore, over-purchase C-beauty threaten consumer to engage in sustainable consumption.

According to BOF's report, the pandemic increase the attitude differences between consumers, who can be divided into anti-consumerism and extreme consumerism (Business of Fashion, 2020). As Euromonitor (2020) pointed out that consumers environmental awareness were heightened because of the obvious decrease in pollution after lockdown policy, including consumers who pay less attention to sustainability before this crisis. Another report from Euromonitor (2020) also Chinese consumers care more about the relationship between their purchasing behaviour and environment, who also avoid irresponsible and unsustainable brands, which will accelerate the beauty sustainable growth. Meanwhile, due to the global recession, with significant unemployment rates growth, the millennial consumers become more price-conscious (Euromonitor, 2020), which means they might decrease unnecessary spending, threatening luxury beauty brands.

Figure 6: 'Revenge Buying' in China after COVID-19 (Zhang, 2020).

However, due to isolation for months, consumers have increasing demand for entertainment, leading revenge buying (Xu, 2020). This type of consumers are considered as extreme consumerism, according to Maslow's Hierarchy of Needs, they focus more on self-fulfilment needs (McLeod, 2007). Schumacher (2020) also stated that compared with individual's needs and desires, for consumers in this situation, sustainability is less of a priority. It is evidenced by Mintel that although consumers need to wear masks, the sales of makeup, such as eyeliners and eyeshadow rise rapidly with unpredicted (Kwek, 2020), meanwhile, consumers said that they even purchased more skincare products during COVID-19, especially consumers from higher-tier cities (Hui, 2020). It means beauty consumer has formed the consumption concept that beauty is essential spending, which can be identified as one of the barriers to sustainable consumption, leading the attitude-behaviour gap becomes wider.

4.0 Chinese Beauty Market

Chinese Beauty Culture

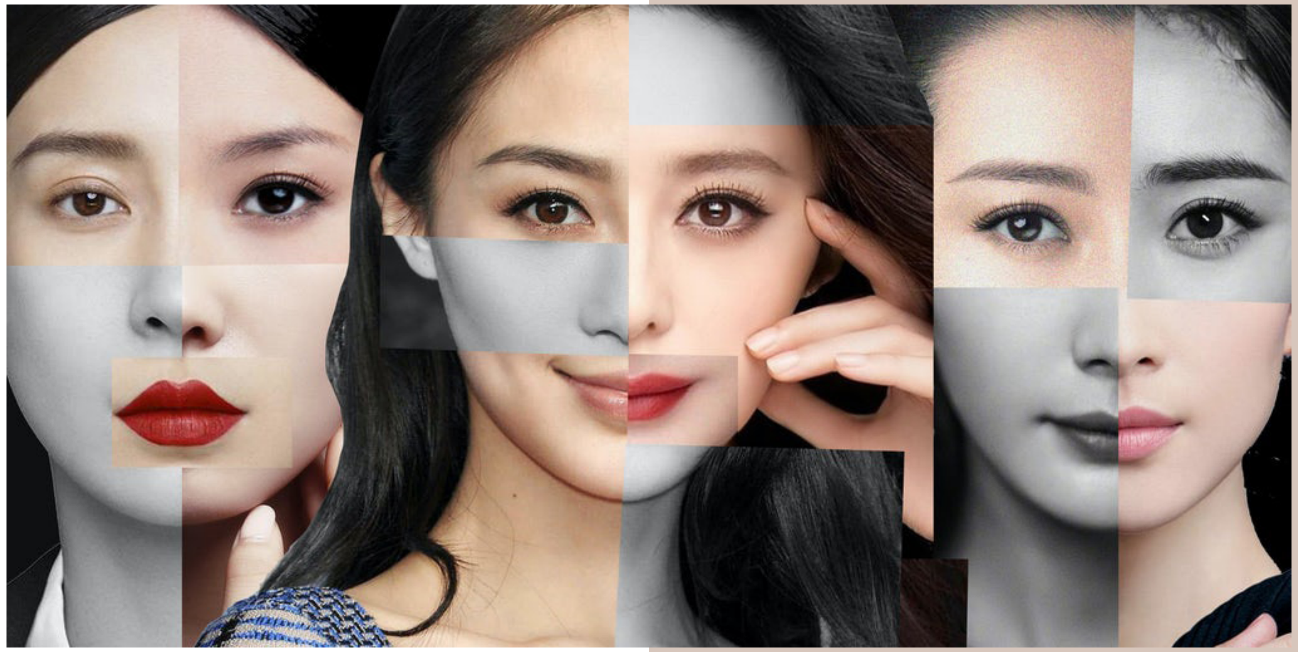

Figure 7: Chinese aesthetic standard (Suen and Wang 2019).

The State of Fashion 2020 reported that the growth of social media obviously slows down in western countries, however, it flourishes in Asian market, especially in China (BOF & McKinsey, 2019). Due to China firstly launched the world's largest 5G networks in 2019 (CNN, 2019), and Chinese consumer behaviour towards mobile-first nature, active social media users has reached to 911 million (Luxion Media, 2019). When discuss about the power of social media, Clampitt (2017) pointed out social media have significant impact on consumers behaviour, attitude and values. Meanwhile, Stephen (2016) highlighted that social media has become the key driver of consumer decision making when consumer purchase. From consumer perspective, compared with traditional media, social media can provide more information of brands and products and satisfy the need for speed (Godey et al., 2016), which is essential for beauty consumers, who need effect products reviews before purchase (Edith, 2020), therefore, millennials heavily rely on social media, especially KOLs (Key Opinion Leader). It is evidenced by Forbes that 72% millennials state they buy beauty products based on Instagram posts and KOLs (Arnold, 2017), which demonstrate that social media and KOLs have the power of high customer conversions (Suen, 2020). Therefore, beauty brands have heavily invested on social media marketing, while Est é e Lauder claimed that 75% marketing budget is spent on KOLs (Forbes, 2019).

Affected by social media, Chinese millennials focus more on their appearance with more rigid beauty standards, which lead to "nationwide epidemic of beauty dysmorphia" (Wang and Suen, 2019). Social media platforms, such as Douyin (Chinese Tik Tok) drives the beauty culture, which most of the in 15-second short videos are filmed by a pretty face with heavily filtered selfie (Luxion Media, 2019). However, these viral short videos make millennials strengthen the belief that beauty appearance can bring a better life (Wang and Suen, 2019) (Forbes, 2019), therefore, for reducing the anxiety about appearance, consumers purchase more on beauty products. Chitrakorn (2019) also claimed that for millennials, purchasing beauty products is not for the necessity, instead, this out of social pressure. It means that due to the appearance pressure driven by social media, sustainability is less priority for millennials beauty consumers, which directly hinder sustainable consumption.

Figure 8: KOL on Xiaohongshu (Zhou, 2020).

Figure 9: Beauty KOL on Weibo (Zhou, 2020).

With increasing distrust on traditional media, millennial consumers tend to opinions from peers and KOLs on social media (Arnold, 2017). According to Celebrity Intelligence, 80% surveyed consumers state that they will buy the products from KOLs’ recommendation (Beauty Business Journal, 2018). Particularly purchasing beauty products, consumers rely more on KOLs’ opinions (Zheng and Pan, 2018), which demonstrate the power of KOLs who can drive consumers purchasing and are pivotal in decision-making.

In Chinese beauty market, Xiaohongshu is the most popular social media platform, which encourages users to generate content, therefore, products tests, reviews and evaluates, including lipsticks and foundation swatches are more authentic, meanwhile, satisfy the millennial consumers needs for trust, community and convenience (Hallanan, 2018). KOLs on Xiaohongshu tend to use videos, including vlogs and unboxing videos, to show beauty products they have purchase, and share the real product experience. To millennials, KOLs engage with them naturally and KOLs’ opinions are more honest and convincing than celebrities advertising (Achim, 2019). Especially the makeup products, KOLs release well-filmed makeup tutorials, which increasingly burn their desire for the same products. With posts titled "The younger, The better", "So white that it glows", Chinese KOLs lead the trend of skincare (Luo, 2019). Millennials become skincare addiction, who will 10-step beauty routine (Luo, 2020), leading over-purchasing on skincare products, which have negative impact on the environment. Driven by KOLs and social media, the unique makeup and skincare culture in Chinese market can be identified as the main factors to motives consumers to purchase more products (Luo, 2019). Although social media marketing and KOL marketing can be considered effective for beauty brands to engage consumers (Luo, 2019), however, the marketing strategies tend to stimulate consumption that directly increase consumers demands for more beauty products (Suen, 2020). In other words, social media and KOL marketing in terms of encouraging consumption can be identified as one of the factors that hinder consumers actual purchase in environmental sustainable consumption.

Luxury Beauty

Figure 10: Chanel Beauty Store (Mira, 2019).

According to McKinsey & Company, Chinese millennials contributed over 50% of total luxury spending in 2018 (Suen and Khan, 2020). With most of luxury brands launch makeup, skincare and perfume, including absolute luxury Hermes, who announced to launch makeup in 2020, luxury beauty is also booming in Chinese market (Zhuang, 2020). For brands, as one of the business category, beauty becomes "Cash cow", which is proved as the most effective way to increase, with 80% profit margin, driving business growth (L’ Oré al, 2020). For consumer, despite a Hermes lipstick still need $67, three times the price of a Mac’s lipstick (Baird-Murray,2020), however, compared with $ 9000 Hermes Birkin bag, beauty products are more easily accessible and affordable for millennial consumers, who have the burning desire for luxury, accelerating to achieve "Luxury Freedom" (Arsenault, 2020). Especially facing financial pressures Post COVID-19, millennials are more willing to spend more on less costly products, which can be identified as lipstick effect (Strugatz, 2020).

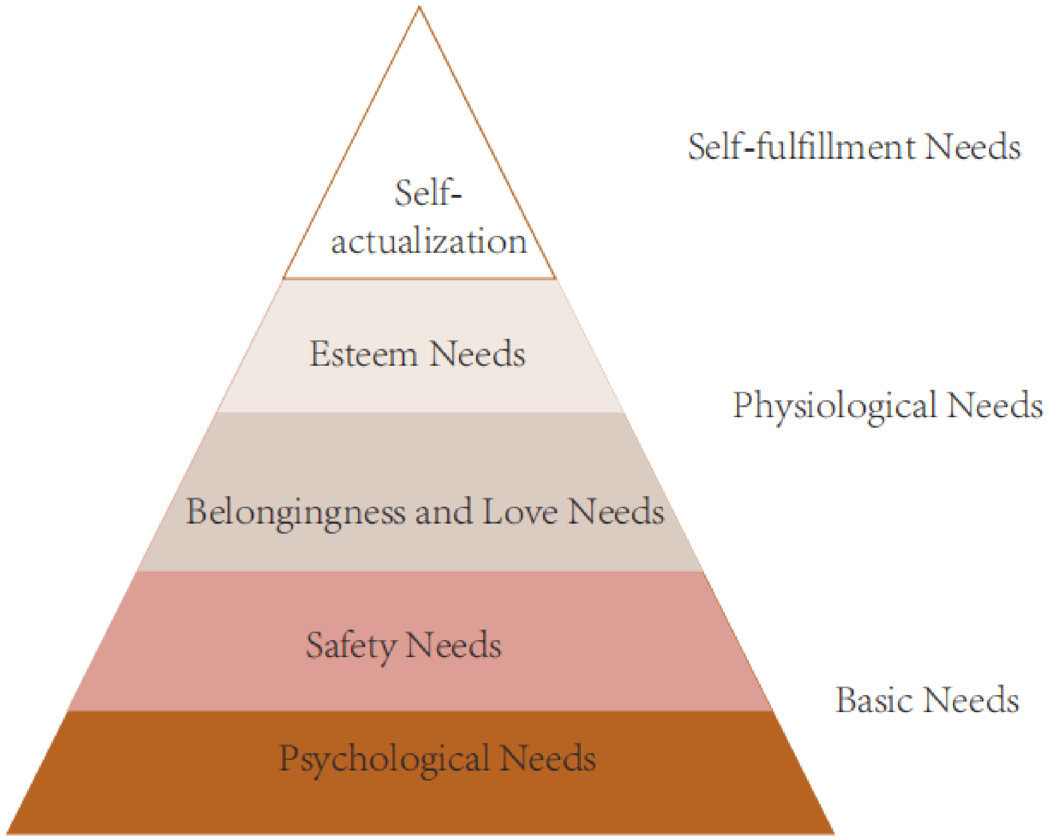

Figure 11: Maslow's hierarchy of needs (Zhou, 2020)

Luxury beauty growth is also driven by KOLs on Chinese social media platform, with posts titled such as "If you love me, Buy me YSL lipsticks". Through such emotional marketing, consumer purchase luxury beauty is not only for material consumption, what's more, shifting to belief and expectation, which can be considered as typical Symbolic Consumption (Liu et al., 2017). According to Maslow's hierarchy of needs, luxury beauty consumers also highlight self-actualization and self-fulfilment (McLeod, 2007), therefore, driven by the consumption culture and concept, although consumers state active attitude, however, they tend to purchase luxury beauty, especially facing with the same price, as luxury beauty means more values for them (Berghaus et al., 2018).

Dictated by rules of aesthetics, luxury beauty packaging create the luxurious experience (Coates, 2020), which can be considered as added value, and beauty consumers even purchase the products only for the packaging

However, luxury beauty is pointed out as culprit of over-packaging (Sherriff, 2019), causing 18 million acres of forest loss per year (Morris, 2018). Although consumers stated to avoid irresponsible brands, however, due to luxury packaging satisfy the value needs, sustainability becomes less prior (Cheng, 2019).

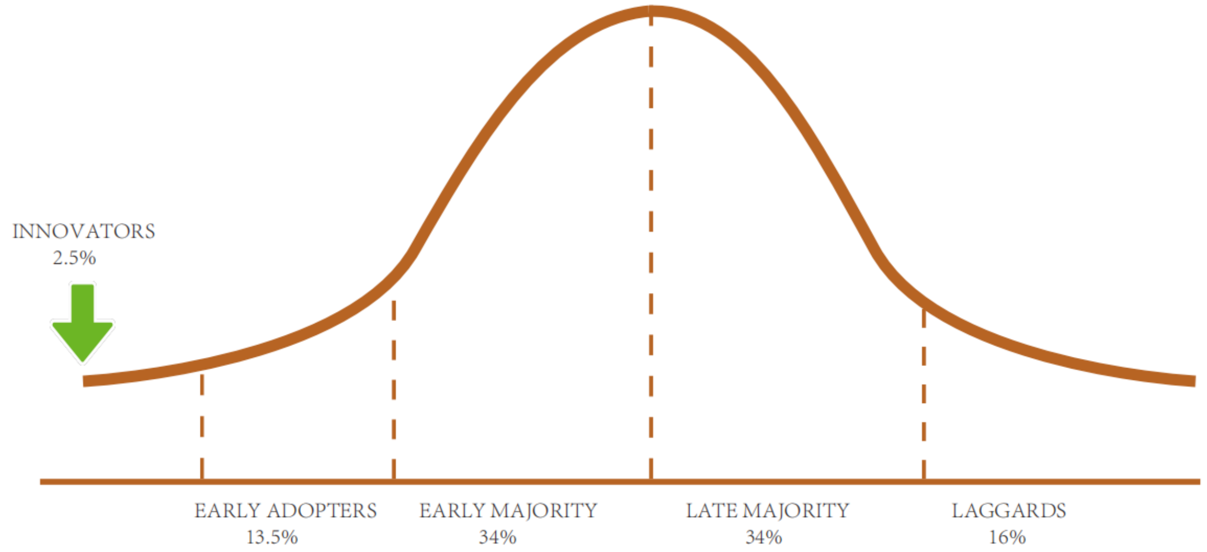

Figure 12: Rogers Diffusion of innovation (Zhou, 2020) (Rogers, 2003)

Fast Beauty

Offering trendy beauty products with lower prices and higher speed, fast beauty is booming in Chinese beauty market (Brown, 2017), which shift consumer behaviour, meanwhile, drive the beauty business environment to move faster.

The American fast beauty brand, E.l.f. Cosmetics, establish the brand value proposition of an affordable luxury beauty (Collins, 2018)., which can be defined as the innovators in Diffusion of Innovations (reference, 2019). E.l.f. Cosmetics offer alternatives of luxury beauty products, even "first-to-mass", with typically under $6 (Chitrakorn, 2018), attracting wider consumer group. For consumers who desire for luxury beauty, fast beauty makes luxurious beauty accessible, while, for luxury beauty consumers the alternatives satisfy the needs when products out of stock. With the speed of time-to-market raise from 32 weeks to 22 weeks, E.l.f. Cosmetics also launched 40% more products in 2017, with 128 new products (Collins, 2018). Utilizing the competitive advantage of speed, the fast beauty brand only used 10 days to reformulate the product when receiving negative feedback from consumers (Collins, 2018), which enhances the brand image. Driven by the needs of prices and newness, E.l.f. Cosmetics become the most attractive brand among Chinese consumers, with over one million brand-related posts on local social media platforms, involving makeup tutorials and products unboxing videos (Figure 13). By implementing vertical integration in supply chain, fast beauty brands not only shorten the speed of product conception to launch, reaching 6-12 times faster than traditional brands but also become more flexible to achieve more consumer-centric business (Chitrakorn, 2018).

Figure 13: Screenshot of E.l.f. Cosmetics posts on Xiaohongshu (Zhou, 2020).

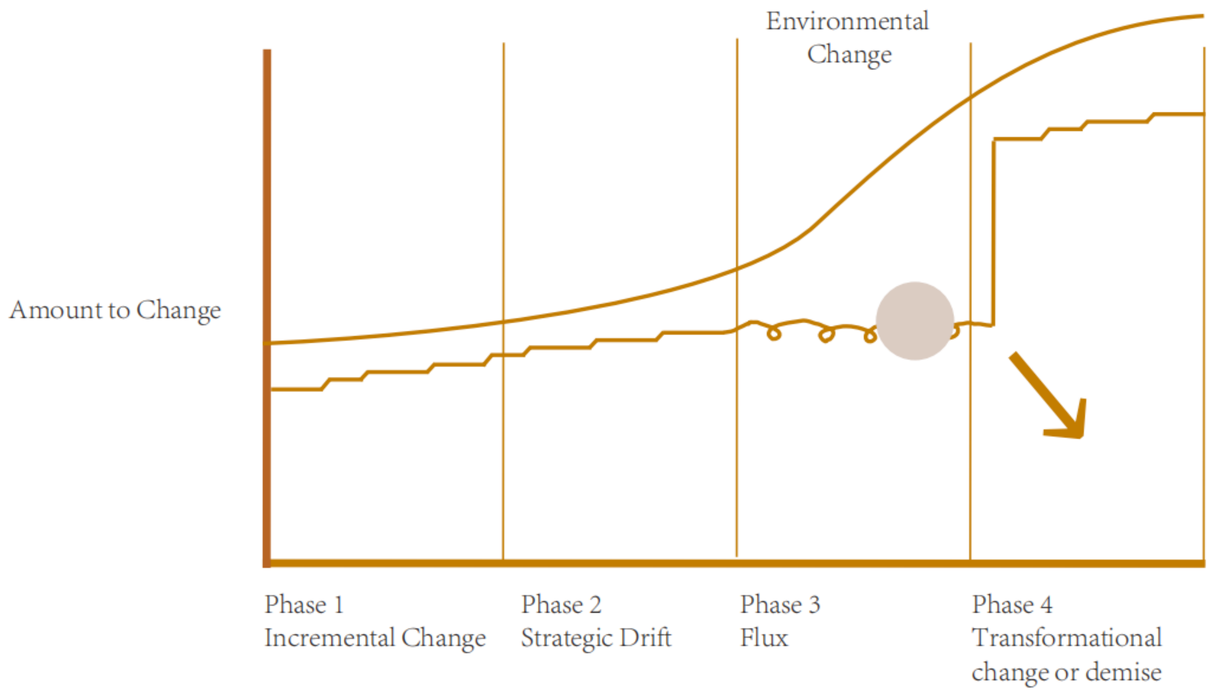

Figure 14: Strategic Drift Model (Zhou, 2020).

However, fast beauty industry is sharply criticised due to the negative impact on the environment (Unterberger, 2018). Khatib (2020) also pointed out that fast beauty drives the consumerism, which consumers are over-purchase, meanwhile, due to the cheap price, product life cycle becomes shorter, increasing the disposable possibility (Mintel, 2020). In addtion, fast beauty brings huge pressure for traditional brands. Est é e Lauder establishes fast-beauty teams in house to speed up the product innovation cycle, meanwhile, and Maybelline decrease lead times from 12-18 months to 6-8 months (Collins, 2018). Within such fast move business environment, it is no doubt beauty industry enter into a vicious cycle, which directly hinders millennials' engagement in sustainable consumption.

Due to the product features, beauty products typically need long innovation timelines, as it takes time to source raw materials and test for formulas stability (Mintel, 2020). Lawlor (2019) pointed out that to reach a lower price, fast beauty cut manufacturing costs by using unethical ingredient and non-sustainable plastics packaging. It means except the overconsumption issues, fast beauty product itself also against sustainability.

Woken brands has taken action to address the issues. Innisfree, Korean fast beauty brand state the sustainable goal, including cruelty-free, all-natural products and recyclable and reusable packaging (Innisfree, 2020). However, Reuters (2016) reported that Innisfree still launches 400 new products a year and shorten product development cycles to 4 month, which means consumer might still over purchase products, therefore, it can be identified as greenwashing. From the consumer perspective, although purchasing green products demonstrates that they successfully turn active attitude into actual action, however, from the environment perspective, the impact is still negative, threatening sustainable development.

Figure 14 shows the Strategic Drift Model, it can be seen that fast beauty is in Phase 3, which will lead to fail if continue implementing current business model. Therefore, business model innovation is needed to be considered, not only for satisfy consumers sustainable needs but to achieve more sustainable beauty business.

Figure 15: Innisfree Advertisement (Innisfree, 2020).

C-Beauty

Figure 16: C-beauty: Perfect Diary (Zheng, 2020).

In the long-term trend, affecting by the appeals of country of origin, Chinese millennial tend to purchase foreign beauty products, due to foreign brands represent higher quality and stronger efficacy (Halepete-Iyer and Bennur 2018). However, according to Bain & Company, C-Beauty (Chinese local beauty brands) overtook foreign brands, with 15% sales growth since 2016 (Hall, 2020), which means Chinese consumer shift to more localize purchase. Meanwhile, according to the consumer analysis above (Part 3), patriotic consumerism of Chinese consumer is on the rise during COVID-19, therefore, for supporting local businesses, the possibility that they purchase C-Beauty might be higher.

Established in 2016, despite there is no awareness in other countries, Perfect Diary has evidenced as the giants of C-Beauty, with two million followers on Xiaohongshu, and sales reached to 1 billion RMB in 13 minutes during 11.11 shopping festival, according to Daxue Consulting (Achim, 2020). It can be said that C-Beauty is Chinese fast beauty, which follows fast beauty business model, with high agility for beauty trends, meanwhile, due to "Made in China", the localize supply chain provide the competitive advantage for more flexible and lower cost (Hall, 2020), therefore, Perfect Diary can launch 6 new products per month. As C-beauty can be local purchased, which provide convenience for consumers from lower-tier city, who is not easy to purchase foreign brands (Spencer, 2018), however, C-Beauty cause more serious over-consumption than fast beauty brands, which directly affect the engagement in sustainable consumption.

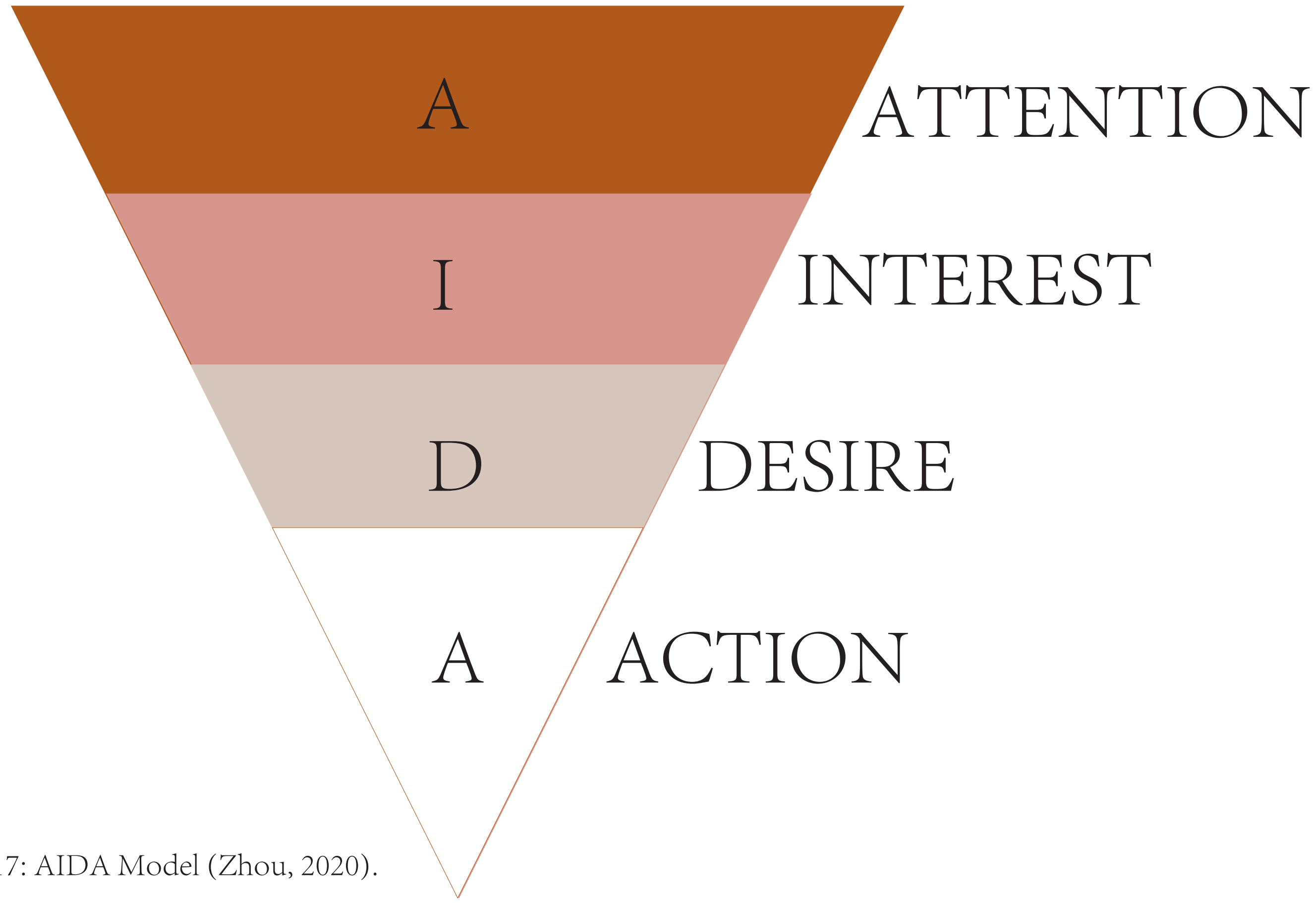

Figure 17: AIDA Model (Zhou, 2020).

Compared with foreign fast beauty, the most competitive advantage of C-beauty is to utilise unique social media infrastructure in China, especially streaming technologies, meanwhile, it is more brave and open in using KOL strategies, which can collaborate with hundreds of KOLs for product promotion (Hall, 2020). Bi (2020) pointed out that live-streaming can be considered as a more effective way to attract millennial consumer than tradition social media. Live-streaming KOLs not only recommend products, but putting a product shopping link that consumer can directly click and buy, which is only valid in few minutes. In addition, products in live-streaming video can be offered with lower price (Flora, 2020).

According to AIDA model (Figure 17), live-streaming KOLs significant impact consumers interest and desire, meanwhile, the limit purchase time force consumer shift to faster decision making on the spot, which lead to serious impulse purchase (Cheng, 2020).

It was evidenced by Zheng et al. (2019) who claimed that social commerce shift consumer purchase experience to increase consumers to buy impulsively. Zafar et al. (2019) defined impulse purchase as hedonical behavior, which entirely coincides with the characteristics of millennial consumer purchase behaviour. It means although millennial state they consider environment impact when they purchase, affected by external factors, they tend to put self-fulfillment in priority.

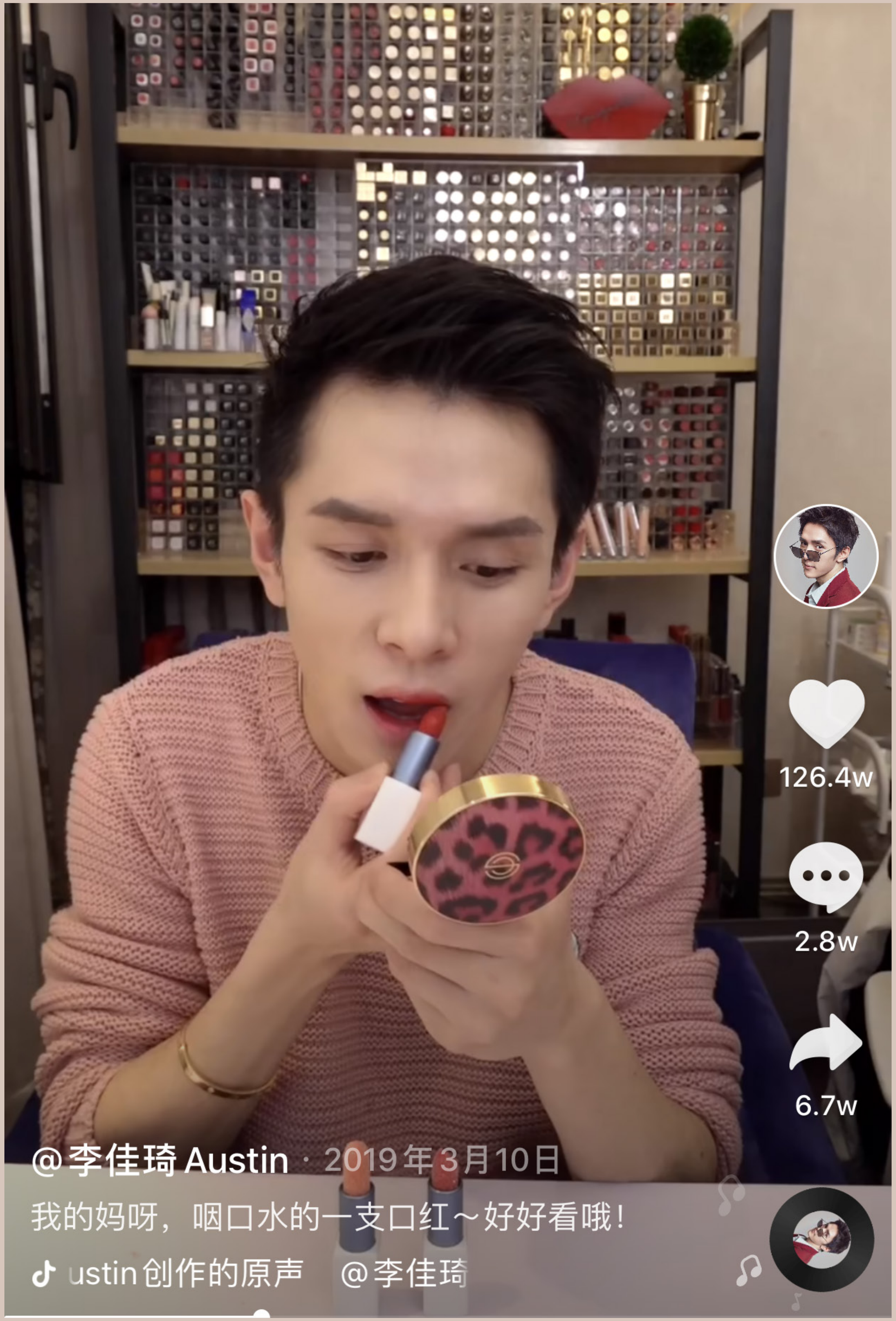

Figure 18: Chinese Livestreaming KOL (Zhou, 2020).

Education

Chen and Deng (2016) claimed that sustainable purchase behaviour is influenced by attitudes. Sreen et al. (2018) also proved that it has a positive association between active attitude and actual sustainable purchase. It means that the more positive attitude consumers have, the more possibility that consumers will shift to actual purchase behaviour. However, Todeschini et al. (2019) reported that although leading sustainable beauty brands have implemented sustainable business model, involving green beauty offers to motive consumers for sustainable consumption, however, due to the lack of education, consumers have less environment-related and sustainability knowledge, which cause beauty brands fail in sustainable business. It is evidenced by a study that most surveyed consumers is unclear and confused about the standards of sustainable beauty (Lin et al., 2018), therefore, it leads consumers have neutral attitudes in terms of sustainability, as they do not recognize the benefits of sustainable beauty products. It means that in order to enhance consumers active attitude, education in sustainability is important, which can narrow the attitude-behaviour gap of consumers.

Bom et al. (2019) pointed out that laws and regulations can be considered as determining factors in education consumer. In terms of sustainable development education, consumers of western countries rely more on the private sector, while, Chinese consumers tend to believe the power of the government, however, the environmental-related polices implementing are quite behind. It explain that despite Chinese consumers have proved that has demand for sustainability, however, compared with western consumers, the environmental awareness is still weak, which affecting actual sustainable purchase (Smith, 2019). However, Chinese government has taken action, which implementing new waste sorting law (Household Garbage Management Regulation) in Shanghai (Tier-One City) in 2019, aiming to enhance consumer awareness negative impact of the waste on environmental sustainable (Zheng, 2019). Meanwhile, animal testing in beauty products also come to end Chinese Premier announced the new cosmetics regulations in 2019 (Baird-Murray, 2020). It shows that government has take the responsibility to educate consumers, which would cause positive impact on consumer attitude.

Figure 19: Cheng Fen Dang KOL on Weibo (Zhou, 2020).

For a long time, due to nature of the products, beauty can considered that have less negative impact on the environment, as brands highlight the feature of "natural"and "organic" (LS:N Global, 2019). In fact, due to the term "organic" and "natural" are unregulated, despite 99% of a beauty product are chemicals or pesticides, as long as it contain 1% ingredient from natural or organic, it can be identified as natural products (Morosini, 2019), therefore, they have little practical meaning in beauty products. Zheng (2019) stated that compared with altruism of western consumers, the main differences in sustainability is Chinese consumers are self-interest, in other word, when they purchase sustainable products, western consumers care more about greater impact, such as purchasing unsustainable products might accelerate global warming, but for Chinese consumers, they purchase natural and organic ingredients due to considering self-skin safety. In order to satisfy consumers demand for sustainable products, unethical brands launch "natural" and "organic" products to confuse and mislead consumers (Niven-Phillips, 2020), which hinder the real sustainable brands to enter the market. In addition, consumers still not realize that although products might be biodegradable and 100% made of plant, however, they ignore the results of widespread deforestation during the sourcing stage (McGregor and Smith, 2019). Despite from consumer point of view, they seem to engage in sustainable, however, for the impact on environment it still negative. It means lack of education in the meaning of sustainability will cause failure of millennials actual engagement (Joshi and Rahman 2015).

Except for government and brands, KOLs also have the opportunities to educate consumer. According to PARKLU, more KOLs mentioned green beauty brands, with the number increasing by 134% from 2018 to 2019 (Rapp, 2019). Meanwhile, on Chinese social media platforms, "Cheng Fen Dang" KOLs are on the rise, who focus on analyzing the ingredients in beauty products, educating consumer how to recognize sustainable products (Luo, 2019). For millennial consumers, "Cheng Fen Dang" become the authorities, therefore, beauty brands can collaborate with such types of KOLs, which not only satisfying consumers needs for transparency of ingredients, what's more, can have a positive impact on enhancing consumer sustainable awareness.

5.0 Future Development in Chinese Beauty Market

Circular Business Model

Figure 20: Hermes Refillable Lipstick (Hermes, 2020).

As The State of Fashion 2020 pointed out that consumer are getting woke and have increasing demands for the new business model, therefore, beauty brands need implement circular business model to achieve a sustainable goal (BOF & McKinsey, 2019). Todeschini et al. (2017) define circular economy as "keep products, components, and materials at their highest utility and value at all times". For beauty brands, circular business model provide opportunities for extend product life cycle. For consumers, it decrease disposable, which motivate them to engage in sustainable beauty consumption.

Refill

77% consumer state that beauty brand have to take the responsibility to address the issues of disposable packaging and they will rely on brands with well performance in sustainable development (Mintel, 2020), therefore, ethical beauty brands begin to implement circular business model, offering refill options to reduce over-packaging. L'Occitane claimed that brands have saved more than 170 tonnes of plastics by using the eco-refills, which proves the positive impact on reducing environmental waste by using the refillable packaging solution (Coates, 2020). Herm è s can also be considered in the leading position in sustainability. Herm è s launched the Rouge Herm è s lipstick collection in 2019 with permanent packaging, which is a metal case that can be endlessly refillable, meanwhile, the price of refill is less lower than original lipsticks, reducing from $68 to $42 (Rosenstein, 2020). Despite compared with other countries, Chinese beauty consumer has less awareness of refillable products, according to Mintel (Zheng, 2019), due to the position of absolute luxury, Herm è s have huge impact on consumer education. Chinese consumer on beauty social media platform Xiaohongshu have shown high satisfaction towards the collection with increasing interest, therefore, from the brands perspective, refill can be one of the solutions of addressing over-packaging and over-consumption.

Figure 21: Kjaer Weis Refillable Packaging (Kjaer Weis, 2020).

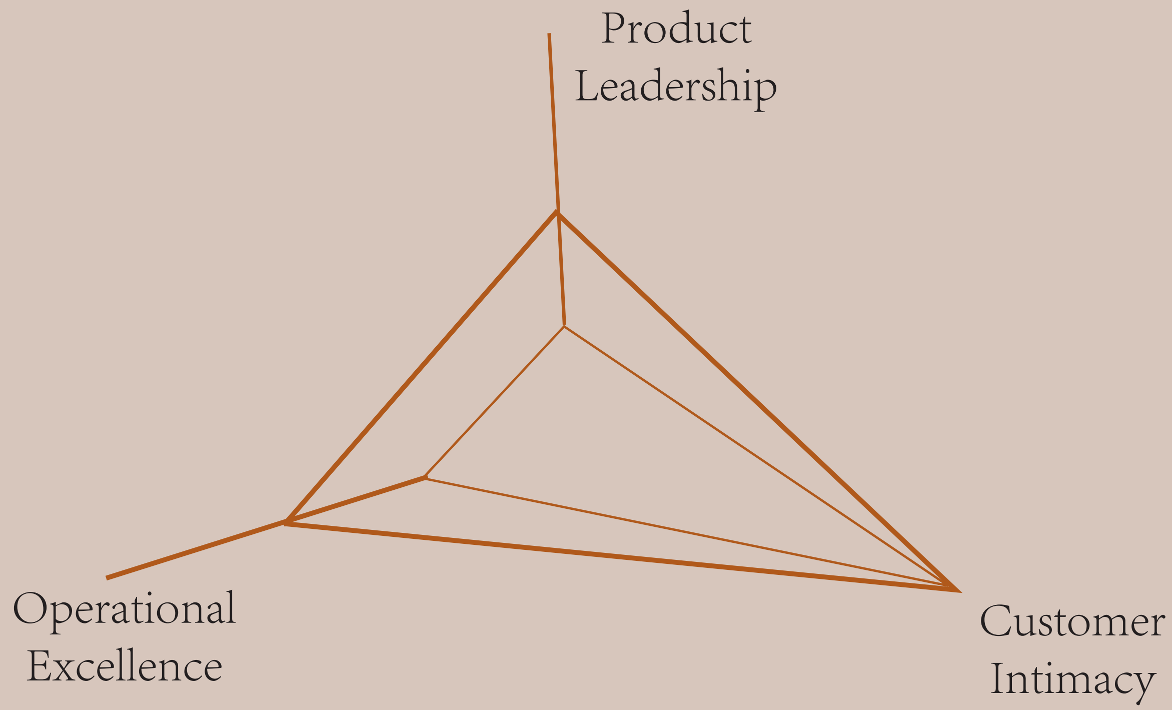

Figure 22: Value Net (Zhou, 2020)(Thind, 2018).

As a pioneer of sustainable beauty, Make-up brand Kjaer Weis also offer refillable products, however, the price of refill cream foundation still need € 44, which consumer can purchase new products from other brands for alternatives (Niven-Phillips, 2019). Joshi and Rahman (2015) pointed out high price can be considered as the barriers to environment-related purchase, Jacobs et al. (2018) added that brand value also impacts consumer decision-making. Therefore, even if Kjaer Weis provides more refillable categories, including blushes, foundations, powders than Herm è s, Kjaer Weis has less influence in Chinese beauty market.

To sum up, refill can be the solution, however, it depends on high brand loyalty and high product quality. Despite considering the price sensitivity, if fast beauty provides refillable with lower price, it still not attract consumers. On one hand, the original price of fast beauty is entirely affordable, on the other hand, fast beauty consumer has low brand loyalty, who tend to purchase for newness and trendy products (LS:N Global, 2019). Therefore, as a solution, refill can be more effective and practical for luxury beauty brands.

For future sustainable development, luxury beauty brands can introduce refillable products, including make-up, skincare and perfume, which not only address the issues of over-packaging but extend product life cycle. As packaging is part of the luxury value chain which represent "its DNA, its story, its heritage" (Culliney, 2020), therefore, luxury beauty brands can also collaborate with famous designer to launch special refillable cases. However, it is questioned by materialism consumer, who consider luxury as extravagance even waste, the refill solution might damage the brand image of exclusivity (Berghaus et al., 2018). On the contrary, due to the refillable packaging is designed by designer, which can be considered as the the unique selling point (USP), it will add value for luxury beauty consumer. Meanwhile, refill represents permanent and durable, enhancing luxury brand image of "stand the test of time", which is also entirely consistent with the concept of sustainability (Berghaus et al., 2018). Refillable products also provide a competitive advantage in product leadership, according to Value Net (Figure 22). It means that the refillable option can not only satisfy the value demand of symbolic consumption consumer, what's more, it can motivate consumer to engage sustainable consumption, narrowing the attitude-behaviour gap.

Recycle

Figure 23: Screenshot of Back to MAC. (Zhou, 2020).

According to Garnier, compared with 90% who recycle kitchen waste, there are only 44% consumers recycle beauty products (Coates, 2019), which shows consumers still have less awareness in the negative impact of beauty packaging on the environment, despite the waste need more than 400 years to be broken down in a landfill (Defino, 2018). Meanwhile, it also means that consumers lack of the education on the real meaning of sustainability.

To encouraging recycle, L'Occitane state that when consumer return the empty products, they can be offered 10% off (Coates, 2019). However, it also can be considered as greenwashing, as consumer are actually encouraged to purchase new products due to the discount offered. Established by Mac, Back to MAC program follows a circular business model, which offer a free lipstick if consumer return six MAC products packaging (M.A.C., 2020). It can be considered as a successful recycling program, which enhances brand loyalty and achieves differentiation. The most important is by offering a reward, MAC encourage consumer to engage in sustainable beauty consumption, which can be the solution for actual sustainable purchase.

Beauty brands can expand "Recycle & Reward" program to recycle consumers products packaging. Every consumer will have a personal account when they first purchase the brand. After they return the empty products, it will be recorded in personal account. When it reaches to 3 times, consumer can be offered a sample, however, 10 empty products return can be rewarded free products. This program aims to increase consumer interest in sustainable beauty and educate consumer, enhancing the awareness of packaging waste. Despite it has limitation to implement refill, this solution provides opportunities for C-beauty and fast beauty to decrease disposable, meanwhile, taking greater social responsibility to eliminate negative brand image in sustainability.

Resell

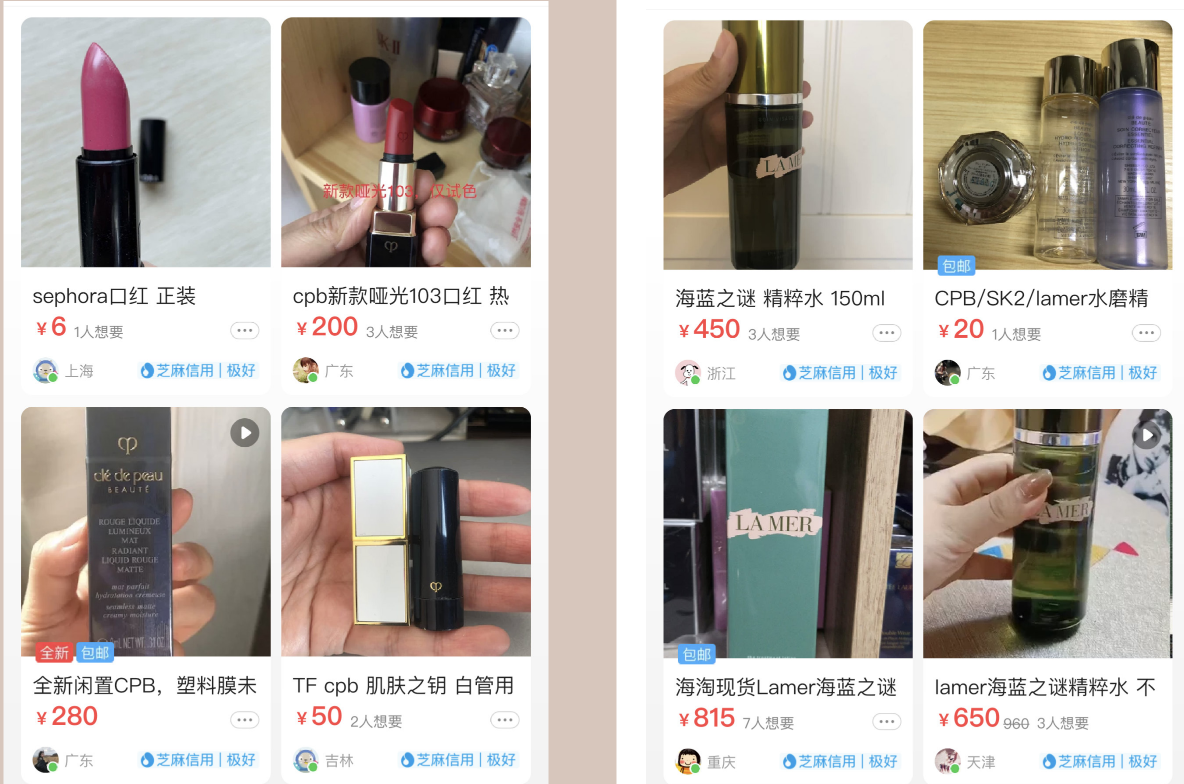

Figure 24: Screenshot of Idle Fish (Zhou, 2020).

According to the Market Analysis in Part 4, it is obvious that Chinese millennials face with huge over-purchasing issues. Except for external factors lead to over-consumption, the nature of the product also cause waste issues. consumer state that it is difficult to find the match colour, especially purchase from online retail, the computer screen has serious colour differences (Chhabra, 2019). However, as hygiene is the key to beauty industry, return policies is strict in China, which most C-beauty do not accept returned products, even it has not been used, directly leading the waste. With increasing demand for more sustainable purchase, resell is on the rise.

MobData reports that Chinese consumer have increasing interests in resell market, which will reach to $178 billion in 2020, meanwhile, millennials are most active, 60% surveyed consumers are willing to second-hand products (Weinswig, 2020). It shows that second-hand market would drive consumer to engage sustainable consumption, however, in terms of beauty second-hand market, it shows no clear growth (LS:N Global, 2019).

Launched in 2014, Idle Fish (Alibaba) is in the leading position in second-hand market (Reuters, 2020), however, despite it has shown operational excellence, product categories on this platform are wide varieties, which have less share for beauty products. It means this platform might have less impact on educating beauty consumers. Although analysis in Part 4 shows that Xiaohongshu can be identified as the main factors for over-purchasing, for beauty consumers, they still rely on this platforms when purchase, meanwhile, as this platform implement user-generated business model, therefore, it can also be the opportunities for establishing the C2C second-hand community on Xiaohongshu to create beauty resell culture.

In this virtual community, users can sell and purchase second-hand beauty products, which not only satisfying millennials demand for newness, but also achieve sustainability, during the process of shifting the role between consumers and sellers (BOF & McKinsey, 2018). In order to provide more convenience for users, there will embrace a link under the post. It means when users want to purchase the products of KOLs recommendation, they can click the link, which can directly show who is selling the second-hand alternatives. By optimizing the platform, on one hand, it satisfies millennial needs for speed, what's more, it can dramatically reduce the over-purchase issues. In addition, from the platform point of view, establishing second-hand community enhance the social responsibility, and educating extreme consumerism consumers for more sustainable purchase.

However, hygienic issues and expiration date become the biggest challenge for beauty resell market, with 68% respondents said that they are unwilling to buy second-hand beauty due to bacteria and hygienic concerns (Schiffer, 2020). The professional dermatologist also suggests that considering the potential health and safety issues, consumer need to avoid second-hand beauty products (Defino, 2018). Especially affected by COVID-19, Euromonitor highlighted that the demand of second-hand products will decrease, due to increasing concerns about products safety and hygienic issues, meanwhile, consumers habits even back to pre-COVID (Euromonitor, 2020), which significantly threaten the development of second-hand beauty, in other words, it hinders consumer engagement in sustainability.

To eliminate the concerns, from platform point of view, it needs to implement specific guidelines, including only accept second-hand products, which are not opened and under 20% usage. If the seller against the guidelines, he/she will be banned the qualification of selling on the platform. From brands point of view, products packaging can be redesigned, which need to be easier to resell. It means to achieve success in implementing second-hand business model, it not only the responsibility of consumers but also both brands and retailers.

New Beauty Culture

Figure 25: Screenshot of Xiaohongshu: Over-purchase Beauty Products (Zhou, 2020).

Based on the analysis in Part 3, it is obvious that over-highlighting the function of skincare product by brands and KOLs drives the belief of more skincare products means better skin, leading the habits of purchasing more skincare, which become the main barriers of sustainable consumption. Therefore, new beauty culture aims to shift current beauty habits and advocate to use less products in daily routine, which can achieve the sustainable goals.

The dermatologist pointed out that excessive skincare not only can not bring advantage for skin but disrupting skin natural ability and metabolic system (LS: N Global, 2019), therefore, Koko Hayashi, the found of Mirai Clinical (Japan skincare brand) suggest "Skin Fasting" and "Skip-Care" (also beauty fasting) to improve the complexion (Hall, 2019). "Skip-Care" refers to reduce the skincare steps in daily routines while "Skin Fasting" is a stripped-back approach, which means beauty consumer only need to give up using skincare products in a day, even a week (Vogue, 2020). Considering the benefits and effects of the skin, dermatologist agreed that "Skip-Care" and "Skin Fasting" can repair and rejuvenate skin (LS: N Global, 2019), therefore, these two approaches might shift consumers beauty habits of multiple-step skincare routines. It means skincare addiction consumer will reduce purchase unessential skincare products, directly addressing the over-consumption, which can be considered as the opportunities for more sustainable development.

“Slow beauty is growing so rapidly that in due time it will become the norm, and the new standard for beauty.”

Estée Lauder

Following the new beauty trend, beauty brands can launch multi-purpose products which can reduce the number of beauty products, meanwhile, reduce packaging waste. Considering the power of KOLs, brands can collaborate with "Cheng fen dang" to introduce the benefits of applying "Skin Fasting" and encourage beauty fasting, driving the slow beauty. As this group of KOLs focus on educating consumer, who can cause more positive impact compared with other KOLs. "Cheng fen dang" will use vlog to record the skin complexion without using skincare products in a week and share the experience to the audience. Encouraged by KOLs, consumer will follow the trend and shift the beauty habits, what’s more, consumer will shift to more rational consumption to achieve sustainability.

However, the cost on beauty KOLs on Chinese social media platforms is enormously high, which needs 50,000RMB for the posts on WeChat if collaborate with a powerful KOLs (Suen and Hall, 2019), which will be the challenge for small beauty brands. Considering the power of KOLs, the marketing cost is necessary, due to engaging in sustainable can bring positive brand image, which will benefit for long-term business (Kingsnorth, 2019).

Figure 26: Chinese consumer heavily rely on Beauty Products (Zhou, 2020).

Anti-consumerism

Despite implementing circular business model is effective for reducing over-consumption, however, it aims to address the issue after consumer purchase (Todeschini et al., 2017), which means it might have less impact on reducing consumer demand for more new beauty products before purchase. According to the effect of COVID-19, it is obvious that despite consumer might reduce purchasing during isolation, the long-term controlled has led to the result of revenge consumption (Euromonitor, 2020). It means for extreme consumerism, relying on external control can not shift consumer behaviour of irrational consumption. As Bennett (2019) state that purchasing is never entirely sustainable, therefore, shifting the culture of extreme consumerism, reducing millennial consumer desire of purchasing become the main challenge.

LS: N Global (2019) reported that the search for the term "no buy" on Google show a significant increase in 2019, meanwhile, YouTuber also engage the #nobuy movement. Hannah Louise Poston, a beauty blogger on YouTube shared #nobuy video, receiving hundreds of supportive comments, and successfully help audience reduce purchasing (Hall, 2019). It means despite KOLs are recognized as the factors of driving purchasing, they still have influence power to positive result.

To drive #nobuy movement, Chinese KOLs can film the series vlogs for document the "No Buy Year" on Weibo, and build a community to share experience with the audience. Instead of recommending latest products, these KOLs aim to encourage audience to rethink the unsustainable purchasing behaviour, especially the extreme consumerism, who need to recognize that the more does not mean the better, and reduce the unnecessary beauty purchases. Meanwhile, instead of buying sustainable beauty products with high price, the #nobuy movement has no decision-making cost, which increases the possibility of the price conscious consumer to engage sustainability.

From brands perspective, as the driver of consumerism, C-beauty and fast beauty need to disrupt the current business model, while, decreasing the number of products is the first step, which challenges the current competitive advantage, and will hurt profits. However, for long-term business, the shift is necessary, brands have to balance the triple bottom line to achieve sustainable business (Geissdoerfer, Vladimirova and Evans, 2018).

6.0 Conclusion

Figure 27: Sustainable beauty Packaging (L’Or é al, 2020).

Serious environment issues make Chinese millennials realize that sustainable development is no longer an option, however, consumer demonstrate attitude-behaviour gap (Jacobs et al., 2018), which directly slows down the sustainable growth in beauty market.

According to the analysis, this report identifies the factors that motivate and hinder consumer towards actual sustainable purchase. Firstly, Chinese millennial consumer have special beauty and skincare culture, who highly concerns about the appearance, leading the increasing demand for beauty products. Secondly, social media and KOLs not only add the pressure of the appearance but also lead the trend of consumerism, meanwhile, optimized E-commerce platforms significantly stimulate consumer for faster decision-making, which leads to impulse purchase. Thirdly, faster beauty business environment leads consumer desire for newness. Finally, lack of education makes consumer unaware of the benefits of sustainability.

Beauty brands have to embrace circular economy to address the issues of over-consumption and create more value (Todeschini et al., 2017), meanwhile, enhancing consumers’ interest in sustainability and encourage consumer to engage in sustainable consumption. In addition, to address consumerism, it is essential to advocate new beauty and skincare culture to reduce purchase frequency, the most important is, the business environment have to slow down to achieve authentic sustainable development.

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