



# 评价达人

Powered by real consumers

## Single's Day (11.11) - China female consumers' shopping plan survey – 2019



# Overview

## Single's Day

has become the biggest shopping event on the planet, and this year's sales are expected to set a new record. As major online spenders in China, accounting for 55% of the total eCom-merce spending last year, female consumers are projected to lead the way on this year's buying frenzy. The continuous expansion of the "sheconomy" across China has positioned the Chinese women as the core engine of consumption growth in the country; that despite the gender imbalance present in the Chinese society – there were 31.6 million more males than females at the end of last year. Considering the importance of the role of Chinese female consumers on the country's aggregated online consumption and economy growth, at 评价达人 - PJDaren, we decided to investigate the shopping plan of Chinese women for this year's 11/11 shopping festival.

As the Key Opinion Consumers (KOCs) are, by definition, every day, ordinary consumers who

influence other consumers' purchase decisions by creating a sharing on social media—their experience through pictures, videos, and reviews. They result in being an ideal representation of China's aggregated female consumers. Their purchases catalyze the brand choice of their peers.

For this study, we surveyed over 6,500 female KOCs from across five city tiers and rural areas in China, and from a range of ages and income levels. To better understand how they plan to shop on 11/11, we asked them questions about their preferences, their purchase intent, their budget, and their expectations for Single's day 2019.

In this study, we explore four factors affecting the purchase decision female consumers made on 11/11: preferences, planning, propensity to spend, and drivers to product choice.



# Methodology

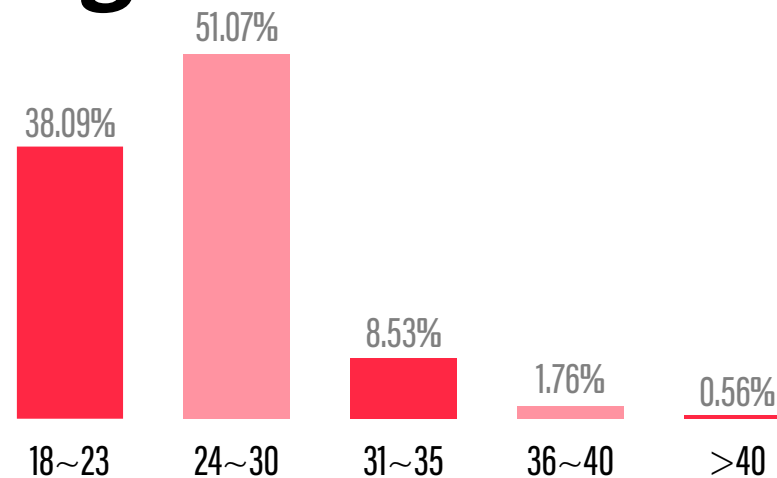
Our panel for this study was comprised of 6,732 women who are:

- Chinese Nationals
- Over the age of 18
- Verified members of Pjdaren's proprietary network of Key Opinion Consumers (KOCs) and chose to voluntarily participate in this study.

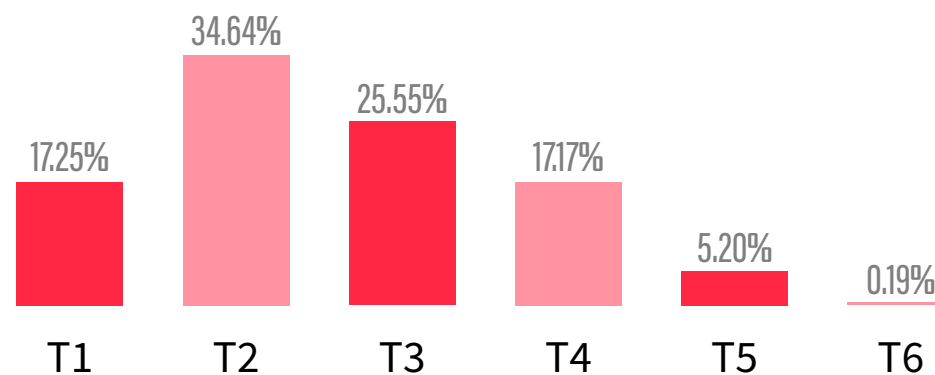
The survey was conducted online through 评价达人 APP, from October 23rd to 28th 2019. With a total of 6,732 completes and a sample of 6,732 female KOCs across all ages, with heavy social media usage (On 2+ social media channels: 99%). Average age of respondents: 26. The margin of sampling error is +/- 1.21 percentage points.

# Composition of survey respondents

## Age



## City Tier





# What is 评价达人-PJdaren

**评价达人- PJdaren** helps some of the world largest brands to engage Key Opinion Consumers with turnkey product sampling programs to drive sales in China. Our network of over a million Chinese consumers create authentic content, reviews and opinions that build trust and influence purchase decisions in a managed, scalable and measurable way.





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# What are KOCs?

KOCs are every day, ordinary consumers who love to create and share experiences through photos, videos and reviews. Their value is based on their relatability, and trustworthy nature. Despite KOCs' influence network is often comprised by few hundred followers; for millennial Chinese consumers, this personable, friend-like appeal have a powerful impact on their purchasing decisions.





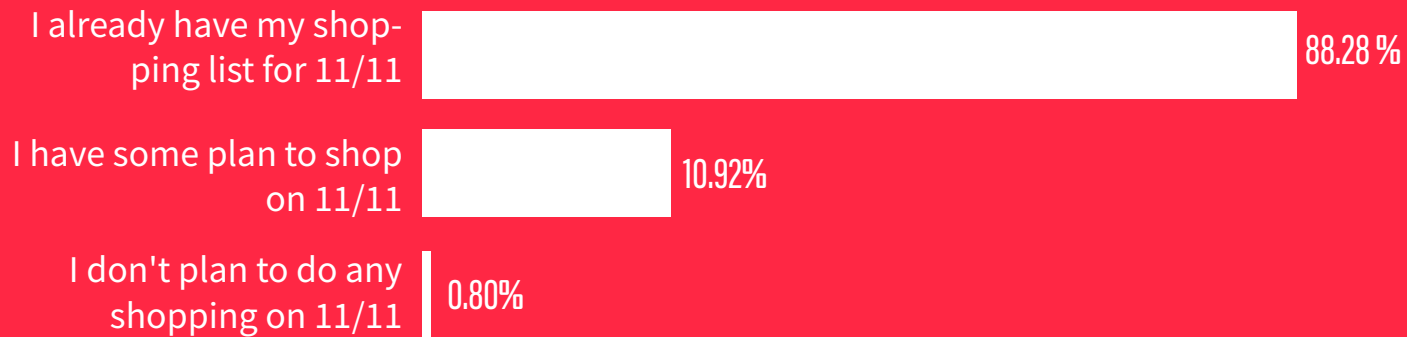
# KOCs' 11/11 preferences & purchase intent



# 1990%

Of female KOCs plan to shop on this year's 11.11 shopping festival.

## PERCENTAGE OF KOCs PLANNING TO SHOP ON 11/11 SHOPPING FESTIVAL.



**99%** of KOCs polled are planning to shop on 11/11. Among those intended shoppers, **94%** are repeated single's day shoppers and **88%** declared to have prepared their shopping list already.

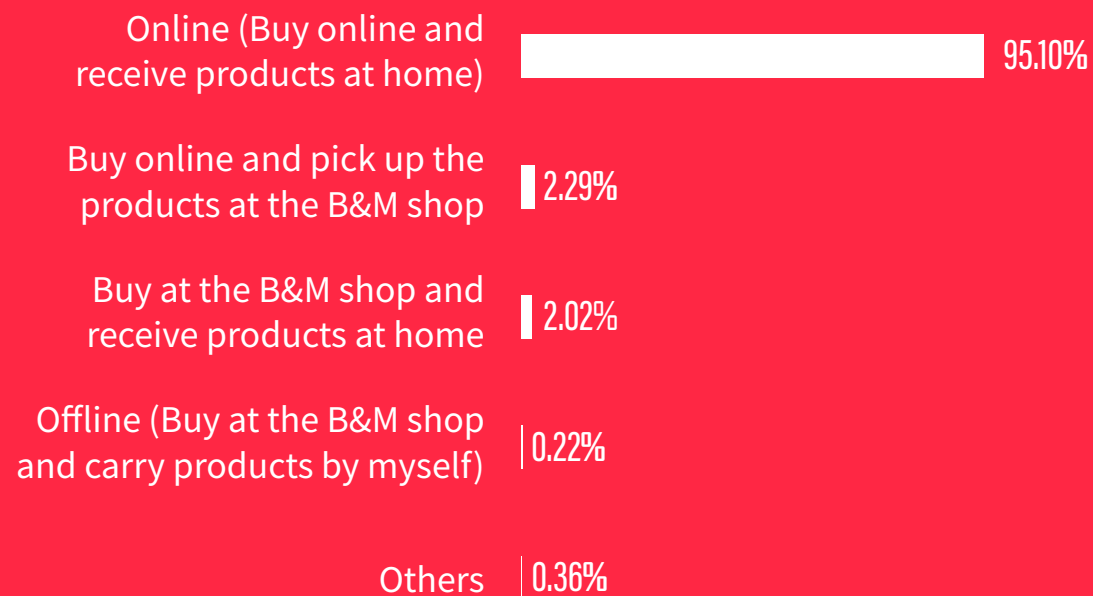


## “Females KOCs are digital native”

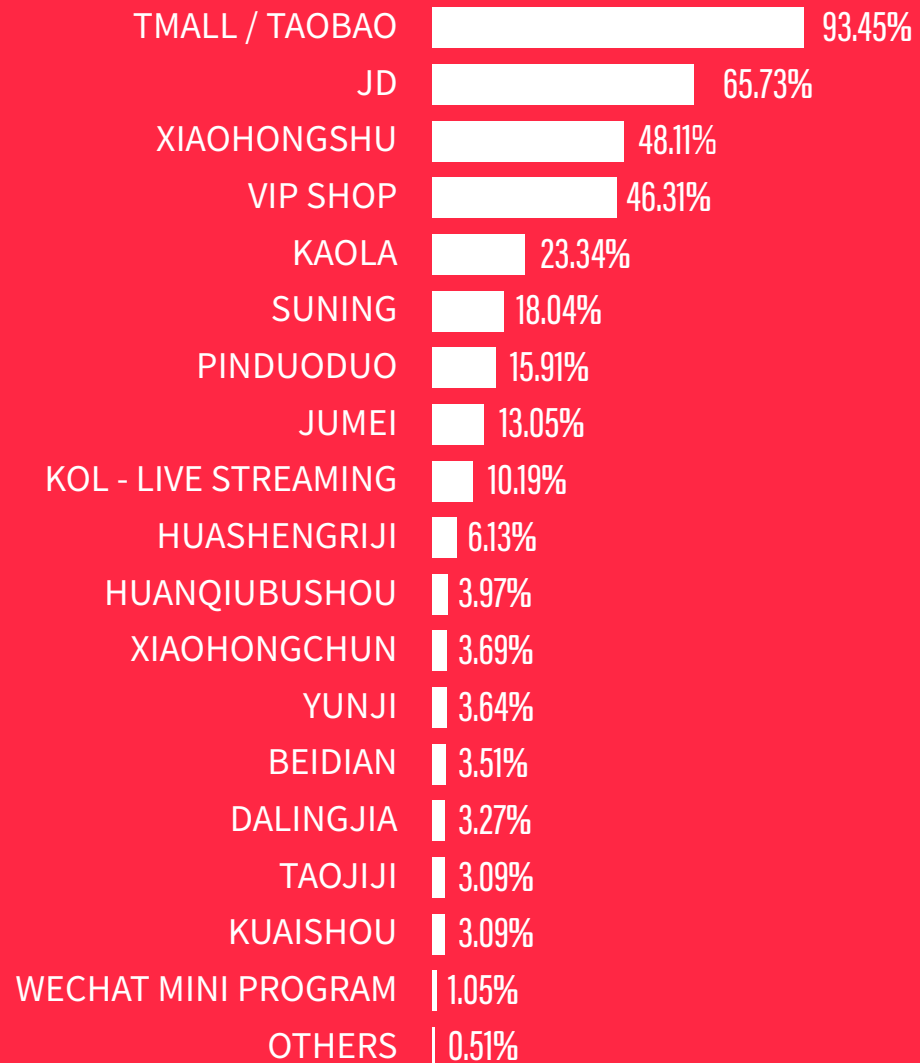
Females **KOCs are digital native** and avid convenience seekers, **95%** of them plan to shop entirely **online** on this year's 11.11 shopping festival.



## KOCs' PREFERRED WAY OF SHOPPING FOR 2019 SINGLE'S DAY



## KOCs' PREFERRED ECOMMERCE PLATFORM TO SHOP ON 11/11 SHOPPING FESTIVAL



**“Tmall/Taobao, JD and Xiaohongshu are top 3”**

Tmall/Taobao, JD and Xiaohongshu are the top 3 e-commerce platform where KOCs plan to shop on 11/11 shopping festival.



## “Beauty, Fashion and Baby products are the top 3”

Beauty, Fashion and Baby products are the top categories female KOCs plan to shop on 11.11 shopping festival.



92.95%

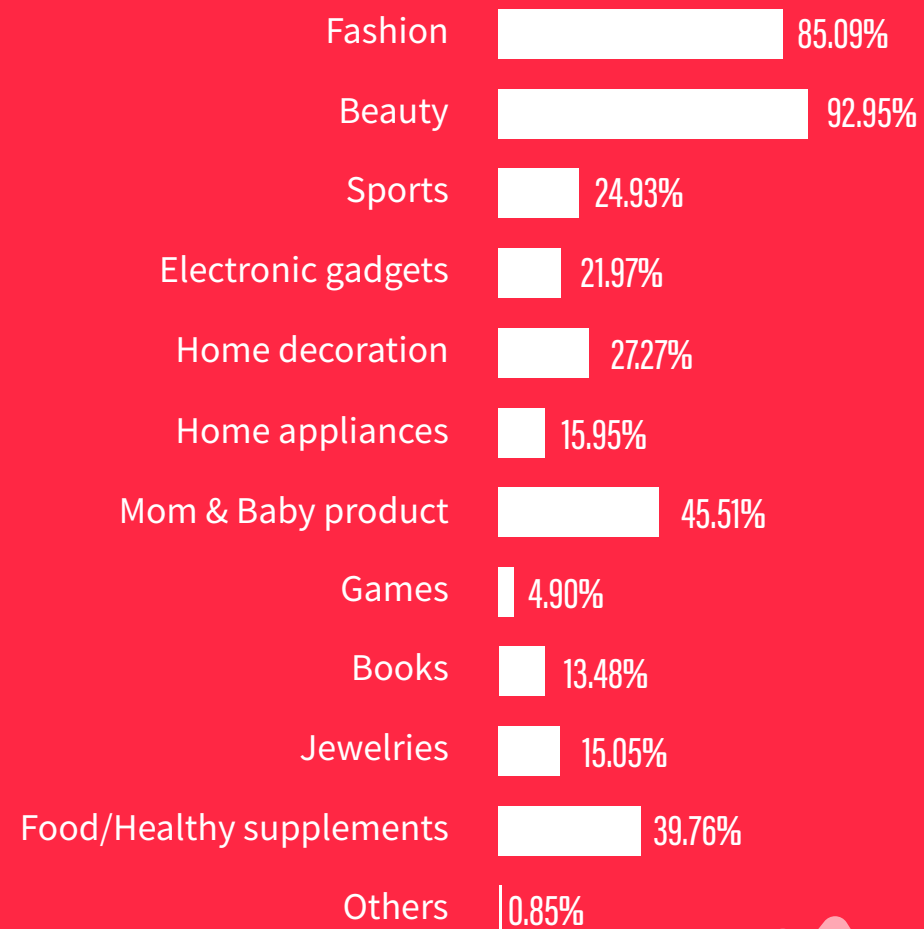


85.09%



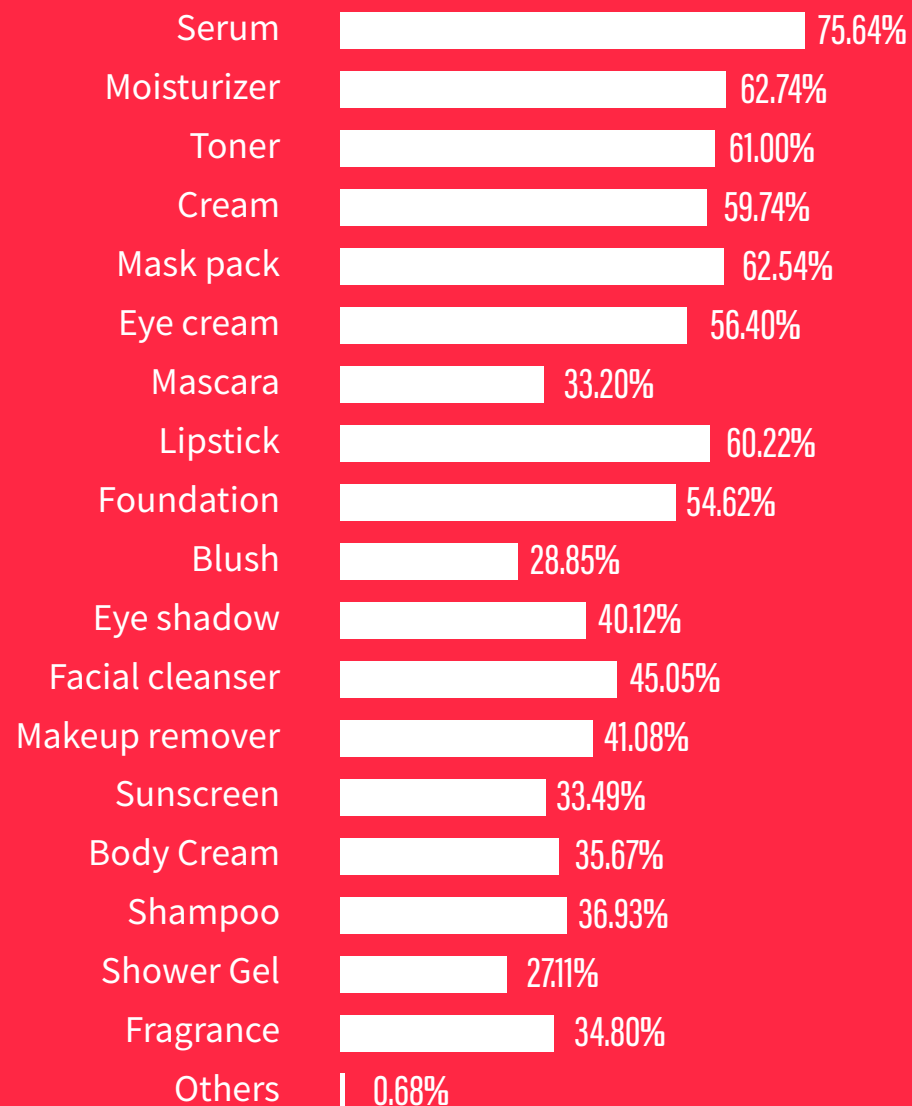
45.51%

## KOCs' PURCHASE INTENT 11/11 ON SHOPPING FESTIVAL BY CATEGORY





## KOCs' MOST PLANNED BEAUTY ITEMS TO PURCHASE ON 2019 SINGLE'S DAY BY PRODUCT TYPE.



**“Skincare is the top priority for beauty KOCs”**

Skincare remains as the top priority to most beauty KOCs. 63.01% of them plan to purchase at least 1 skincare item during the upcoming 11.11 shopping festival.

Serum, Moisturize and Maskpack are the top 3 skincare products KOCs intended to buy on 11/11. In addition, Lipstick, Foundation and cleanser rank as the top 3 items with the higher purchase intent among KOCs in the makeup category.

*“KOCs favor skincare product original from South Korea”*

## KOCs' PREFERRED SKINCARE PRODUCTS BY ORIGIN



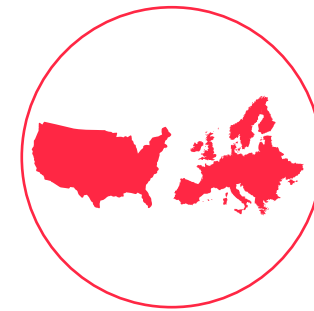
16.53%



28.66%



26.10%



25.81%

(Others: 2.90%)

## KOCs' PREFERRED SKINCARE PRODUCTS BY ORIGIN

Skincare brands original from Japan rank No. 1 in the preference of KOCs in tier 1 and 2 cities. Whereas, KOCs in Tier 3 and below cities prefer skincare brands original from South Korea. Additionally, KOCs in tier 3 and below cities declared higher favorability toward local skincare brands than their peers in tier 1 and 2 cities.

### T1&T2



11.96%



26.34%



29.93%



29.26%

### T3 AND BELOW



23.31%



30.26%



23.22%



20.84%

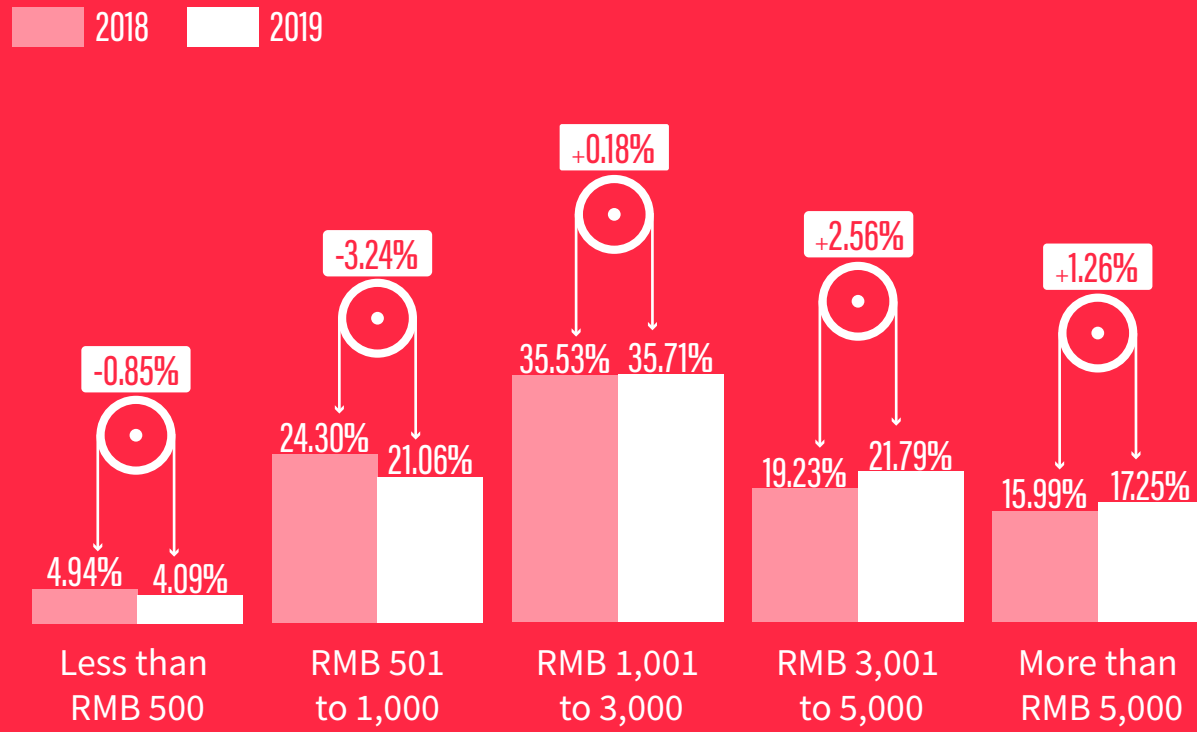
Others: T1&T2 2.51% / T3 AND BELOW 2.38%



# KOCs' propensity to spend



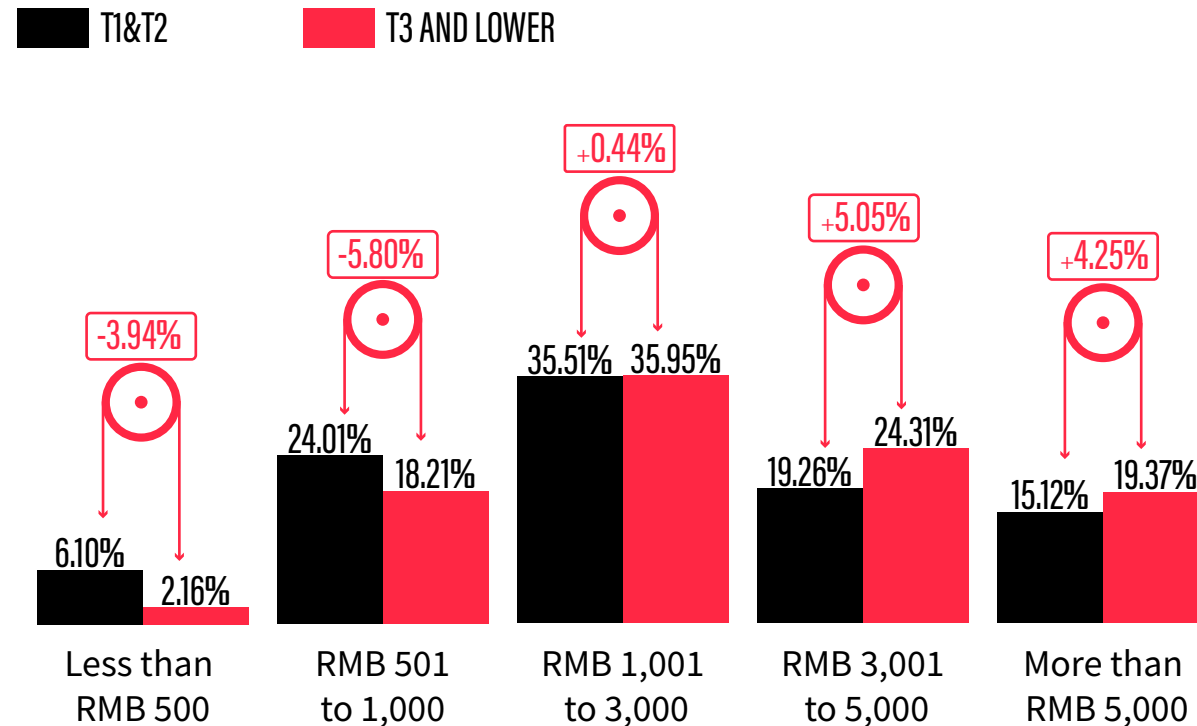
## KOCs' PROPENSITY TO SPEND ON SINGLE'S DAY (2018 – 2019)



**“KOCs are confident about their spending”**

This year female KOCs are expecting to open their wallets wider than last year; 39.04% of them plan to spend more than 3,000 on 11.11 shopping extravaganza, a 3.82% increase compared to last year.

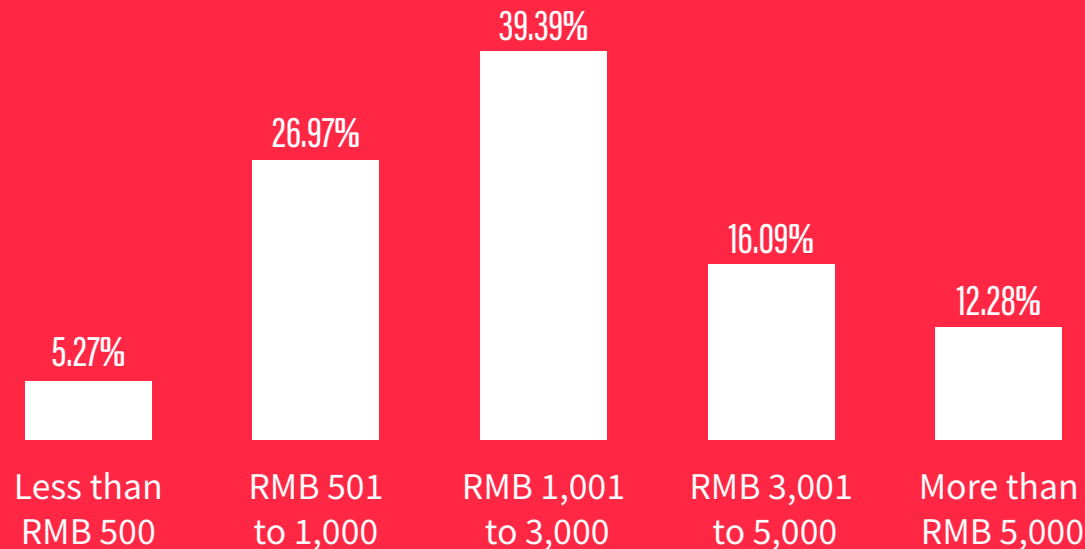
## KOCs' PROPENSITY TO SPEND ON SINGLE'S DAY ( 2019)



KOCs from tier 3 and below cities plan to spend more than their peers in tier 1 and 2 cities. 77% of KOCs in tier 3 cities and below expect to spend RMB 1,000 or more on single's day. On the other hand, KOCs residing in tier 1 and tier 2 cities declared to have a more conservative budget to spend on 11.11, only 70% of them plan to spend more than RMB 1,000 on 11/11.

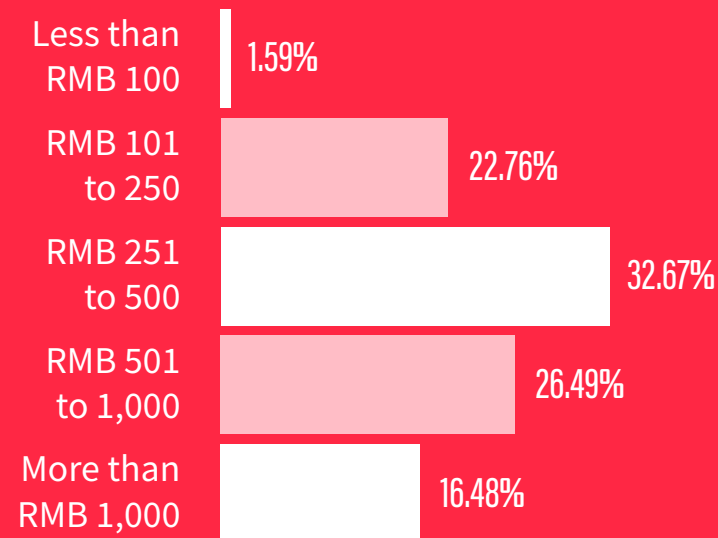
**“ More than 67% of KOCs plan to spend more than RMB 1,000 for purchasing beauty products on 11/11 ”**

### KOCs' INTENDED BUDGET FOR BEAUTY SHOPPING ON 11/11 (2019)



**76%** of beauty KOCs plan to spend more than **RMB 250** per each beauty item they plan to purchase on this year 11.11 shopping festival. Among them, **26%** indicated to plan to spend more than **RMB 500** per product and while **17%** of KOCs are willing to pay more than **RMB 1,000** for a single beauty item.

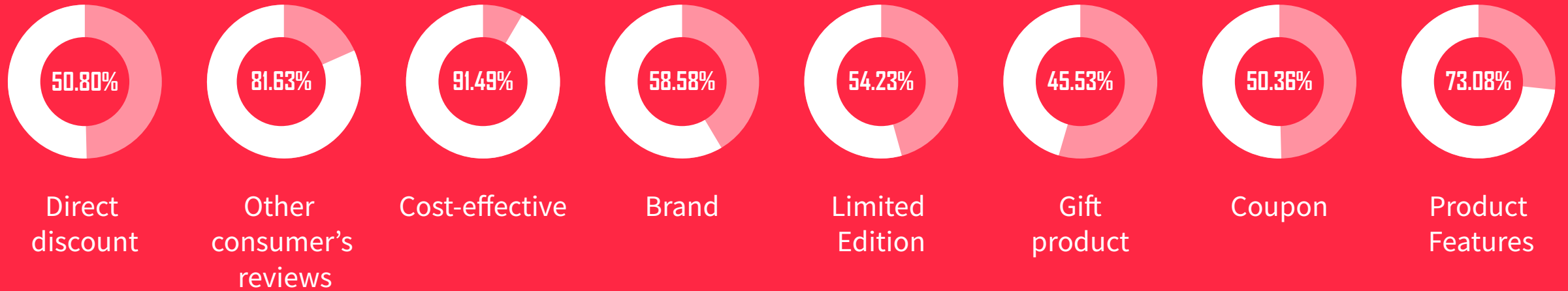
## KOCs' PROPENSITY TO SPEND PER BEAUTY ITEM ON 2019 SINGLE'S DAY





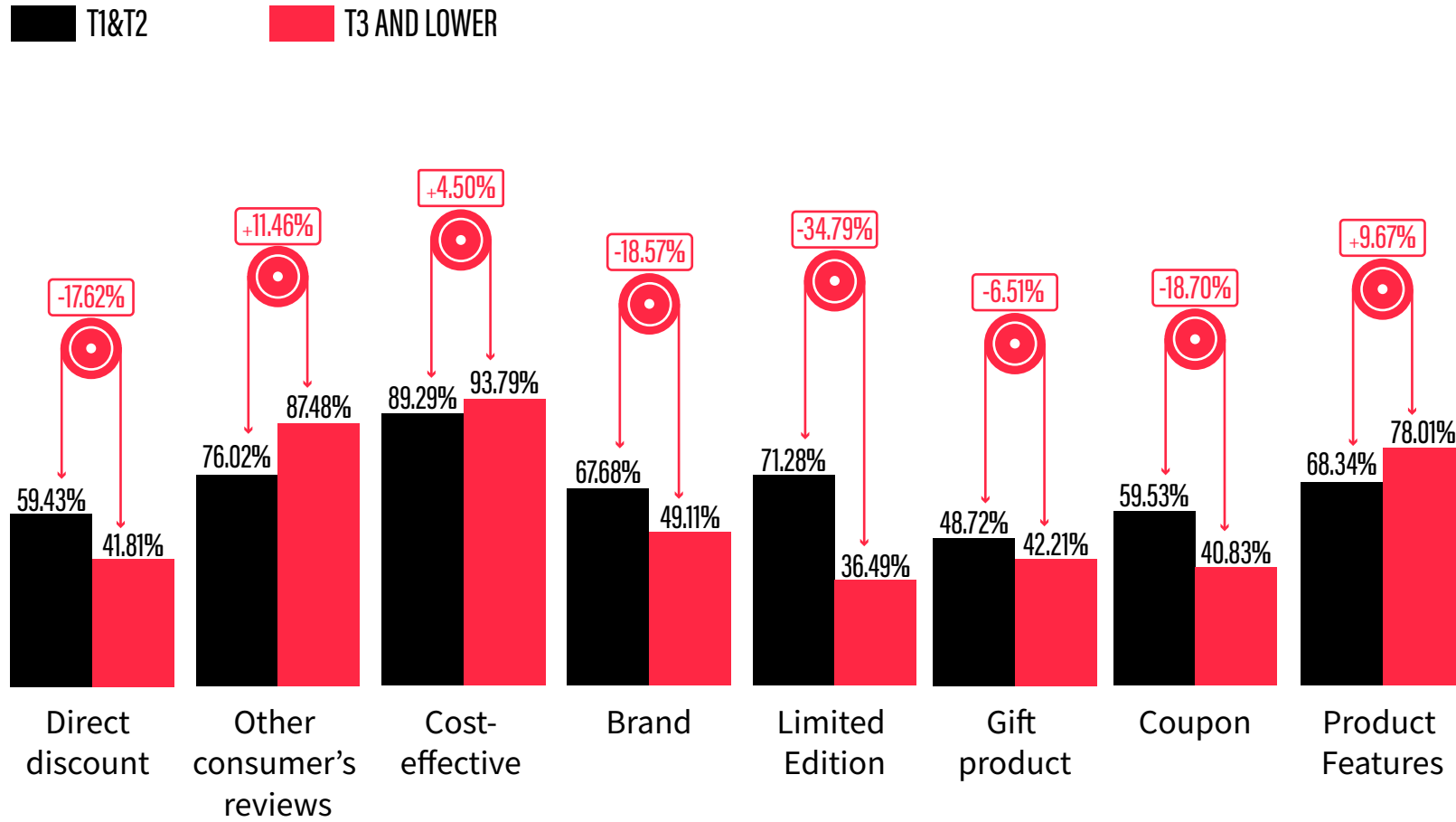
# KOCs' drivers to product choice

## KOCs' KEY DRIVERS TO BEAUTY PRODUCT CHOICE ON 11/11



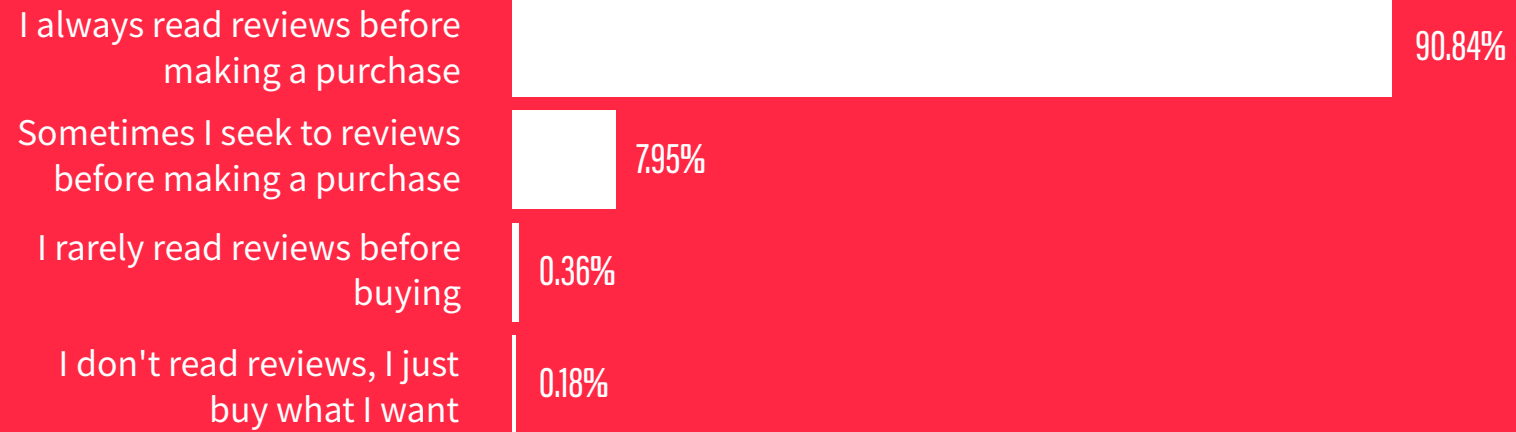
When evaluating what influence the purchase decisions of beauty KOCs **cost-effectiveness, other consumer opinions and products features rank as the top 3** drivers influencing beauty KOCs' product choice.

# KOCs' KEY DRIVERS TO BEAUTY PRODUCT CHOICE ON 11/11



The key drivers influencing beauty products KOCs purchase in tier 1 and 2 cities differ significantly from those impacting the product choices of KOCs in tier 3 and below cities. While 59% of KOCs residing in tier 1 and 2 cities identified "direct discount" as one of the critical factors influencing their product choice, only 42% of KOCs in tier 3 and below cities consider direct discount as an impactful driver to their beauty product they choose to buy. Additionally, we found that purchase drivers like brand positioning and exclusivity are not as influential for KOCs living in tier 3 and below cities, as they are for KOCs from tier 1 and 2 cities. For KOCs from tier 3 and below cities other consumers opinions, product function and effectiveness are more determinants in the purchase decisions they made.

## % OF KOCs' WHO READ REVIEWS BEFORE MAKING A PURCHASE DECISION WHILE SHOPPING ONLINE

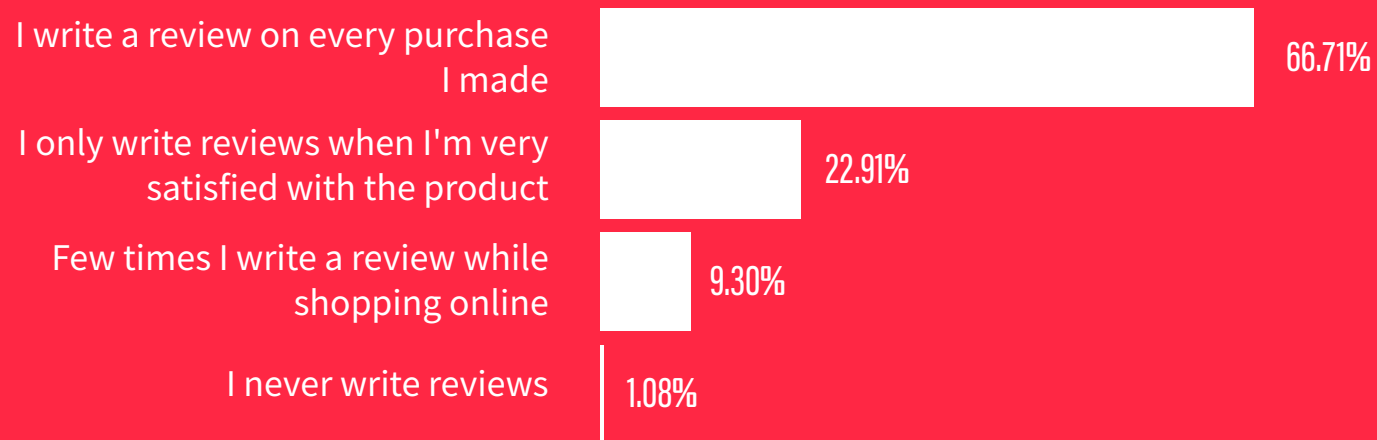


**98%** of female consumers consult products reviews prior to purchase. Reviews are an expected component of the shopping experience of female KOCs. In fact, **92%** female consumers consider reviews to be an essential resource when making a purchase decision.

**83%** of female consumers indicate they won't purchase a product online without reading reviews. And over a third (**47%**) won't purchase products in a offline store without first consulting reviews.

Consumers don't write reviews for every purchase. **66%** of KOCs claim to write a review for most of their purchase, while **22.91%** claim to leave a review only if they are very satisfied with the product.

## % OF KOCs' WHO WRITES REVIEWS WHILE SHOPPING ONLINE





eCommerce gamification plays an important role capturing the attention of female KOCs. More than **60%** of female KOCs declared to engage and enjoy the various missions-like games released by e-commerce platforms prior to the shopping festival.

## KOCs' ATTITUDE TOWARD GAMIFICATION IN E-COMMERCE PRIOR TO 11/11



# FINAL NOTES

Despite the overall economy slow-down, Chinese female consumers remain confident about their future and are willing to spend. 99% of female KOCs plan to shop on this year's 11/11 shopping festival. Among those intended shoppers, 39.4% plan to spend more than RMB 3,000 on single's day, a 3.82% increase compared to last year. Female consumers in tier 3 and below cities show a higher propensity to spend, compared to their peers in tier 1 and 2 cities. Online is the way Chinese female consumers prefer to shop on 11/11 (95%). Taobao/Tmall, JD, and Xiaohongshu are the top 3 eCommerce platform where KOCs plan to shop for this year's shopping festival.

Beauty, fashion, and baby products are the top 3 categories female KOCs plan to shop on 11/11. Taking a closer look at the purchase intent of female KOCs for beauty related items, skincare products result in being the most planned items in their shopping list. Most KOCs from tier 3 and below cities prefer skincare products original from South Korea and show a higher favorability to local skincare brands. Japanese skincare brands are most preferred for KOCs from tier 1 and 2 cities.

When analyzing what moves KOCs to choose a beauty product over another, cost-effectiveness, other consumers' reviews, and the product's features were pointed out as the most influential factors in general. Factors such as direct discount, brand positioning, and exclusivity are more determinant on the beauty product choices of KOCs in tier 1 and 2 cities.

Product reviews are an expected component in the shopping experience of Chinese female consumers. 98% of them consult consumers' reviews prior to purchase. Product reviews are not only relevant to the online shopping journey of female consumers, but they also play a critical role in their offline purchase decisions. Over a third of female consumers (47%) reported a high resistance to make any purchase decision offline without consulting other consumers' opinions first.

Chinese female consumers are open to spend and clear about their preferences. And, as they become more sophisticated, their expectations, desire for convenience, and hunger for crowdsourced information are also on the rise. Female consumers in tier 3 and below cities demonstrate a higher "willingness to pay" compared to those in tier 1 and 2 cities. The increasing interest toward more top quality items among female consumers in less developed cities represents a significant shift in their consumption pattern, which opens a new field of opportunities for brands to tap into.

## About this study

Single's Day (11.11) - China female consumers' shopping plan – 2019 is a survey of 6,732 Chinese female Key Opinion Consumers (KOCs), and subsequent analysis, architected by 评价达人 - Pjdaren with the goal of helping brands and retailers better understand how females plan to shop on 11/11 shopping festival, their preferences and the factor affecting their brand choices. The study was released in October 2019.

## About 评价达人 – Pjdaren

评价达人 – Pjdaren helps some of the world largest brands to engage Key Opinion Consumers with turnkey product sampling programs to drive sales in China. Our network of over a million Chinese consumers create authentic content, reviews and opinions that build trust and influence purchase decisions in a managed, scalable and measurable way.

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