

Pulse of China

August 2024

HOT WEATHER AND PERSONAL CARE

WHAT PERSONAL CARE CATEGORIES
ARE CONSUMERS MOST INTERESTED
IN DURING THE SUMMER MONTHS?

REGULAR FEATURES

What were the most searched and viewed topics in the month of July in China?

Your Monthly update on what Chinese consumers are thinking, feeling and exploring

Brought to you by **Searchlight Management Consulting**
Data provided by **Xiaohongshu (小红书)**

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Hot weather and personal care

Personal care needs change from season to season. This month we examine what consumers are searching, posting and reading about on Xiaohongshu to get some insights into what they do to meet the challenges of summer.

China's second largest online shopping day – June 18 or 6.18 – is often an occasion for consumers to stock up on personal care items for the next few months. Since searches and consumer behaviour for the summer might be affected by what consumers did in preparation for 6.18, we've looked at two months data this time – June and July – to ensure we're capturing more representative data from the very start of the summer.

First up, it's interesting to see the interest in perfumes far outstripping that of any other product category. The searches for perfumes are almost four times those of the next most searched product – shampoo – and more than ten times that for any of the other products within personal care. (Perfumes here is a very broad definition that would cover all sorts of deodorant sprays, cologne and other liquid products used to mask body odour – the reference is not just to the fine fragrances category).



1. Perfumes are the most searched topic during the summer months, leading all other personal care categories by a very significant margin

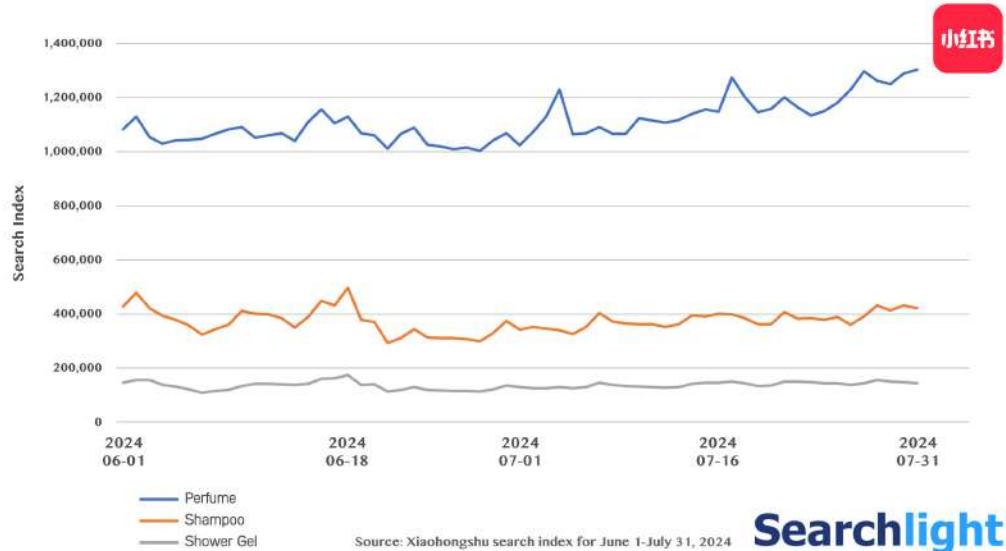
Perfumes and shampoo dominate search during June and July



Since we were aware of potential anomalies in the data caused by consumers researching their shopping lists for 6.18, we also looked at day-by-day search trends across the two months. Interestingly, while perfumes showed a mild peak just around 6.18, searches for perfume-related content have grown steadily across the two month period, reflecting an increasing interest in this area of personal care as the summer progresses. Shampoos have also had a consistent, mildly increasing interest over the period, following a small peak and then a slight decline in interest just after 6.18.

2. Despite the typical peaks caused by 6.18 shopping research, perfumes show consistent increases in search volume across the period

After a slight peak for 6 18, perfume related searches continue to climb



We wanted to see if perfume and shampoo - as the two dominant personal care categories being searched in June and July - also show increasing search trends for summer months compared to the rest of the year. We found that perfumes are searched for much more than shampoos and that searches grow to their peak over June to August. Shampoo, on the other hand, has a more consistent search pattern although there is a peak in October which may be a pre shopping research spike for 11.11, China's biggest online shopping festival.



Image Source : www.vogue.com.tw

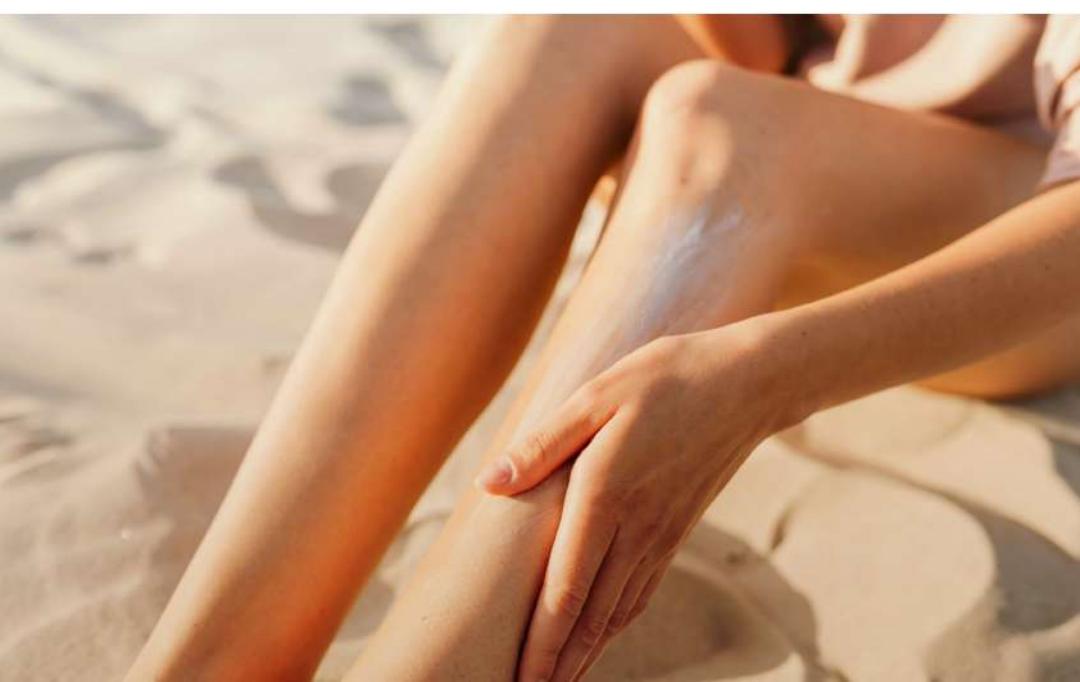
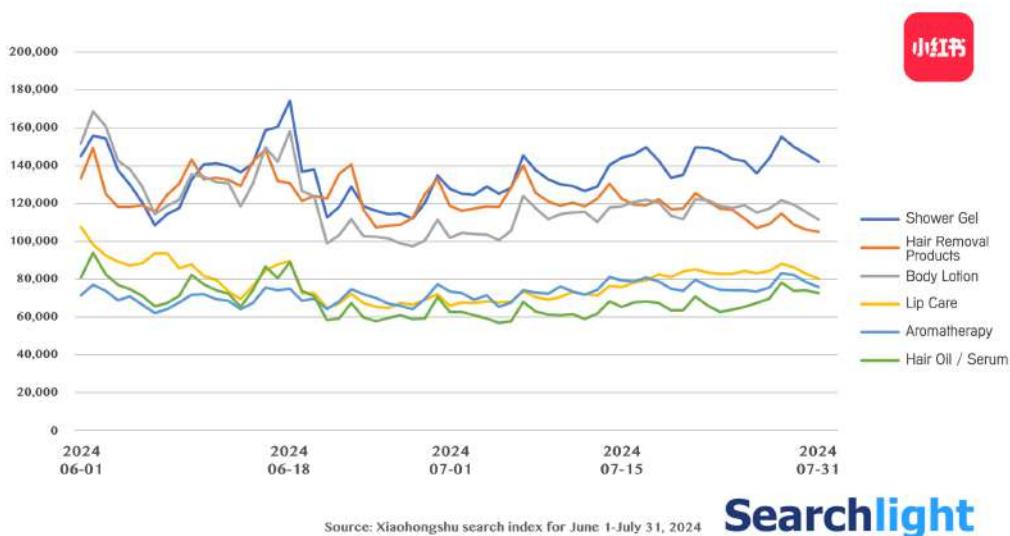
Given that perfume is a category with far more new brands, fragrances and news, the continuous high volume of search for perfume related topics is not a surprise. Consumers tend to look for new fragrances and products in this category and are therefore constantly researching everything that is new. Shampoos, on the other hand, are a more habitual buy where consumers do not typically research the category for new variants and products every time they are making a purchase decision.

Over a 12 month period, Perfume related searches are higher than for Shampoo and trend upwards through spring and summer



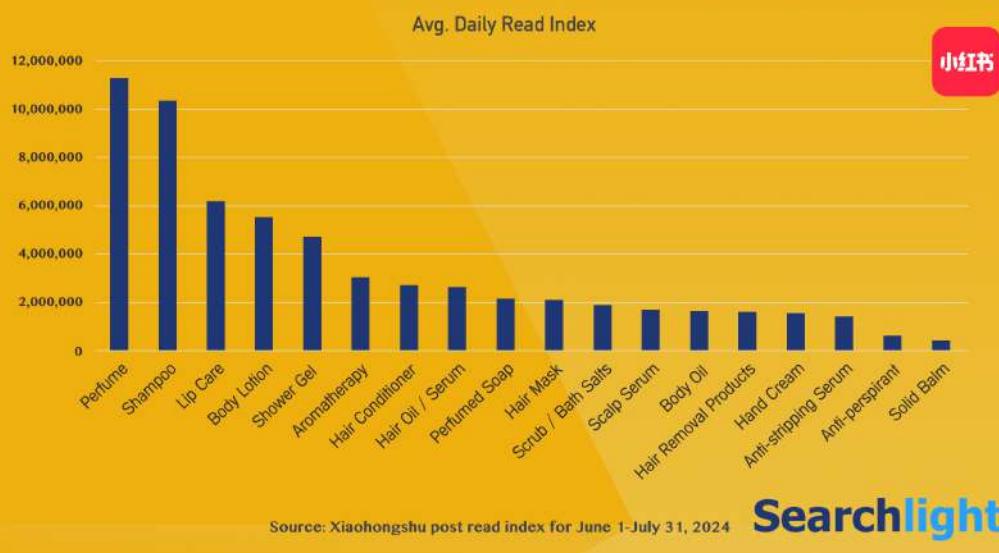
Apart from perfumes, most other products show a marked peak for 6.18 and tend to be fairly steady in search volume over the rest of the period. However, one exception to that is shower gel, which after the 6.18 peak and subsequent drop, then shows a consistent increase in search volumes. To make it easier to read, we've graphed the remaining personal care categories below, separately from the top 3 searched categories.

Product searches peak for 618, thereafter shower gel increases consistently from its post 618 drop



3. Readership is spread more evenly across personal care categories, although perfumes and shampoos still dominate consumer interest.

Posts read show a more consistent interest across personal-care categories, although perfume and shampoo are still the categories most read about



Source: Xiaohongshu post read index for June 1-July 31, 2024

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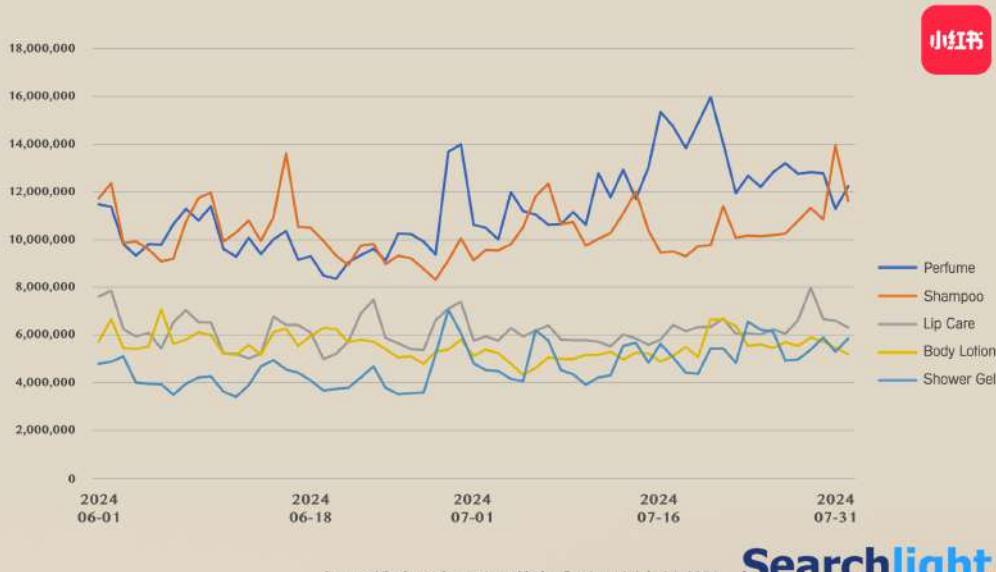


Image Source : www.lush.com/hk/zh_hk

There is considerable interest in reading about these topics – we note posts read numbers much greater for these categories than for others we've examined in past months. The broad picture remains the same – perfume and shampoo related posts are read far more than posts about the other products within personal care. However, the gaps in readership across topics are far narrower than the gaps in search volume.

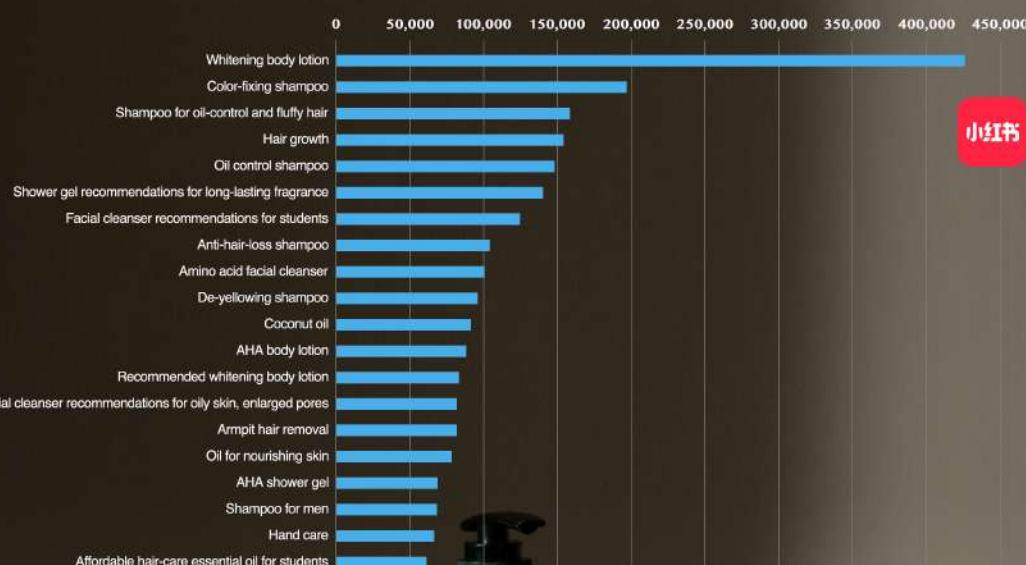
Just as we saw in search patterns, perfume and shampoo related posts attract more readership as the summer progresses. Shower gel has a somewhat slower, steady increase as well.

Perfume, Shampoo and Shower Gel related posts increase in readership over the two months (putting aside the 618 peak) while other products have more steady reading patterns over this time



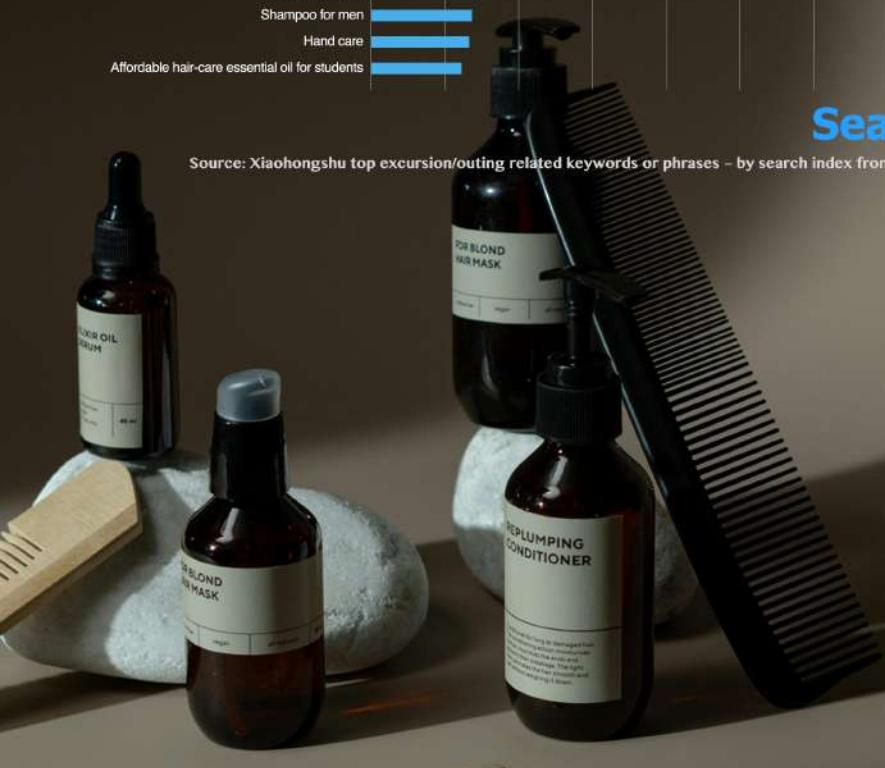
4. Searches are mostly for information or recommendations about very specific types of products to address skin or hair needs, not all of which relate to summer

Top search keywords / phrases tend to be specific to skin / hair conditions, not all are summer-specific. Students are constantly looking for recommendations specific to their budget



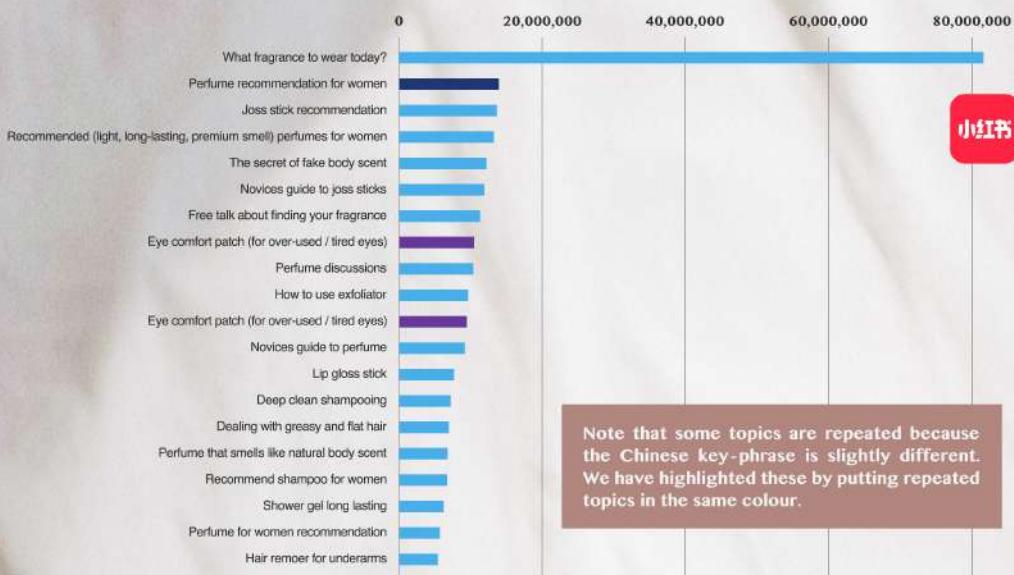
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Source: Xiaohongshu top excursion/outing related keywords or phrases – by search index from June 1 – July 31, 2024



5. Perfume dominates the top 20 topics read

Fragrance related topics dominate the top 20 most read topics, with a search for a fragrance “today” being the most popular topic



Note that some topics are repeated because the Chinese key-phrase is slightly different. We have highlighted these by putting repeated topics in the same colour.

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Source: Xiaohongshu top excursion/outing related topics – by post viewing index from June 1 – July 31, 2024

“What perfume to wear today” is a very dominant and popular topic. Thereafter, perfume recommendations for women in various slightly different topics dominate the list. There is interest in long-lasting perfumes and also long-lasting shower gels.



Summary

Perfumes seem to dominate consumer interest when it comes to personal care in the summer months. Even after accounting for the peak in research preceding the 6.18 shopping festival, perfumes seem to be a topic more consumers explore over the course of the summer, both in search and in posts read.

Other personal care categories seem to be more problem-solution oriented in the minds of consumers, with searches and posts relating to recommendations or information to address a specific skin or hair issue. Many of these are not specific to summer.

Perfumes, of course, covers a wide range of products that address both fragrance and deodorizing needs. Summer represents a unique opportunity for this category in particular to leverage consumer interest and build their presence in consumer minds and shopping baskets.



XIAOHONGSHU **HOT TOPICS** **of THE MONTH**

As we do every month, we looked at top topics without any filters on the areas of discussion to arrive at our generic hot topics of the month. While these span fashion, summer cooking and travel, it's interesting to see that personal care in the form of "whitening" makes its appearance here as well. The context here is the "dog days" (named such because of astrological links to Sirius, the dog star) in the hottest period of summer. According to the Chinese Lunar calendar, this is the best period for long-term treatments that boost the immune system.



Topic	Content Description	Views	Article Link
#fitcheck	Hurry up and follow the trend and start a new summer dressing trend - #fitcheck!	180 million	Article Link
Summer School of General Knowledge	Share your knowledge with others! It can be useful knowledge in life, knowledge about summer, knowledge to guide the future	180 million	Article Link
Summer Kitchen Wars	"It's so hot in the summer, cooking has become a big problem. Share dishes that don't require cooking, or cool summer delicacies!"	24 million	Article Link
My Dream Car	What is your dream car? Or do you already have your own dream car? Does its experience meet your expectations ?	16 million	Article Link
Small tips for travelling in Hong Kong	From the dazzling night view of Victoria Harbour to the bustling streets of Central, every moment is worth capturing ! Take a stroll through the streets of Hong Kong and record your trip to Hong Kong.	14 million	Article Link
Whitening plans for the dog days of summer	"Dog Days" – the hottest period of summer – are the best time for treatments to boost your immune system and for general beauty related treatments (according to the Chinese Lunar Calendar)	11 million	Article Link

the platform, the users, and the consumers

Xiaohongshu is China's leading lifestyle platform that inspires people to discover and connect with a range of diverse lifestyles. As of the end of 2023, Xiaohongshu has attracted over 300 million monthly active users sharing content about their daily lives on the platform. On Xiaohongshu, consumers can search, read and share authentic content about all kinds of product categories and lifestyle related experiences and services. On Xiaohongshu, 90% of content on the platform are UGC (user-generated content) coming from ordinary users. Xiaohongshu has truly become the trusted source where ordinary people turn for making consumption decisions. Its average number of searches daily has exceeded 300 million. Xiaohongshu's users engage through authentic, interesting and useful content, building a relationship based on trust. They share, discuss and are constantly "seeding recommendations" about their favorite products and lifestyle trends. 70% of users are from the post-90s generation, and 50% of users come from first-and second-tier cities in China, representing strong spending power. Consumers can directly engage with a feed based on topics they are interested in, follow certain specific content creators or influencers, or search for content on specific topics and subtopics.

Marketers can look at broad sweep statistics to get a sense of what's hot in their category, which brands / segments / consumer needs and questions are most current. They can examine what content consumers are engaging with, separate brand content from UGC, and see consumer trends expressed in posts, content views, and searches.

If you want to know more about Xiaohongshu, come and explore our consumer experience for yourselves via the web on

<https://www.xiaohongshu.com>



ABOUT
XIAOHONGSHU



ABOUT US

Searchlight

Set up in early 2020, Searchlight is a boutique management consulting firm headquartered in Shanghai. We focus on helping brands understand and prioritize their opportunities and overcome their barriers to growth. We do this by working closely with our client teams over an extended period of time, facilitating their process of decision-making, building capability by guiding and training their teams, and also helping with organization redesign if necessary. Our team of 14 associates covers a wide range of specialist areas – marketing, advertising, media, content marketing, brand management, HR, CRM, sales management, technology, and business management. Each of us has at least 20 years of work experience, a large part of that in China.

We coach and assist client teams to make quality decisions for the business. We also assist in the design of organizational processes and financial models, especially building internal and external capabilities for strategy implementation.

We've worked with both international and local brands, startups and public listed companies - J&J, Hollister Medical and Pandora as well as SUNNER Foods (a listed company that leads the food processing category with a 40-year history) and startups like Little Ondine, LeBunna and Youxin coffee. For more about us visit

www.searchlightchina.com

If you want to convert information into usable insights and strategy, contact us:

enquiries@searchlightchina.com