



## Comparing Marketing Strategies for Cosmetics Between China and The U.S.

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### Abstract

*This study presents a comparative study of promotional strategies in the cosmetic industry within two major global markets: The United States and China. They were chosen for this study because they are the two greatest e-commerce beauty markets in the world. The focus is on how digital transformation has reshaped these strategies, with a case study of L'Oréal providing practical insights. This topic is chosen for study due to the transformation of traditional marketing to digital marketing, especially with the emergence of social media marketing. The analysis reveals that while both markets have embraced digital marketing, there are significant differences in their approaches. In China, a more integrated strategy has emerged, leveraging E-commerce platforms to reach a broader consumer base and stimulate consumption. In contrast, the U.S. cosmetic market relies more on traditional promotional channels and offers fewer E-commerce discounts, with a slower adoption of live-streaming culture. However, U.S. firms continue to utilize digital channels to foster brand awareness, as demonstrated by L'Oréal's significant advertising expenditure and influencer collaborations. The study uses the literature review method with over three hundred of sources to synthesize and compare evidence in the U.S. market could potentially benefit from integrating more elements of the Chinese digital marketing strategy, particularly with respect to discounts and live-streaming. This study sheds light on the potential for adapting successful promotional strategies across diverse markets while acknowledging cultural and regional specificities. Despite its focus on top brands, future research could explore strategies employed by smaller firms and extend the comparison to other sectors.*

**Keywords:** Digital Marketing, Promotional Strategies, E-Commerce, Cosmetics Industry, Cross-Cultural Comparison

### INTRODUCTION

Cosmetics, encompassing skincare and makeup products, enhance individual appearances. Witnessing significant growth, the global cosmetic industry reached a market value of USD 262.21 billion in 2022 ([Grand View Search, 2022](#)). As the world's two dominant economies, the U.S. and China, command the largest shares in this market. In 2022, the market sizes for the U.S. and China were USD 49 billion ([Petruzzi, 2023b](#)) and approximately USD 57.14 billion, respectively ([Ma, 2023](#)). Although the Chinese market is 1.17 times larger than the U.S., the Compound Annual Growth Rate (CAGR) between 2016 and 2021 is markedly higher in China (10.3%) than in the U.S. (0.2%) ([MarketLine, 2022](#)). Factors such as economic conditions, distribution channels, content strategies, and consumer habits offer some insight into the varied growth rates in these countries ([Céline et al., 2023](#); [Durmusoglu et al., 2023](#); [Lin & de Kloet, 2023](#); [Mu et al., 2023](#); [Sugeng & Chusjairi, 2022](#); [Zhang et al., 2023](#)).

Before the era of digitalization, the impact of traditional media such as newspapers, posters, and handouts in advertising was remarkable. However, the advent of digital social media and the widespread use of smartphones have rendered these old-school marketing strategies less effective.

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Companies are now devising innovative methods to advertise their products, establishing a strategic relationship with their consumers, and creating a lasting brand image. Nevertheless, due to geographical and cultural differences across the globe, firms adopt unique marketing approaches to promote their products.

The primary aim of this study is to conduct a comparative analysis of promotional strategies in the cosmetics industries of the United States and China, exploring how economic, cultural, and technological factors influence these strategies (Khan et al., 2023; Parilla & Abadilla, 2023; Saeed et al., 2023). Specifically, this study will assess the impact of social media, digital platforms, influencer marketing, and e-commerce dynamics on consumer behavior and marketing tactics in both the United States and China. Through this analysis, the study aims to provide strategic insights for industry stakeholders and identify future research directions to further enhance the understanding of market dynamics in the global cosmetics industry.

## LITERATURE REVIEW

### Economic Analysis

In the past two decades, China's Gross Domestic Product (GDP) has experienced significant growth, reaching USD 12.6K in 2021 (Data Commons, 2021). This economic expansion has resulted in an increased disposable income per household from 2,000 Yuan in 2000 to 36,883 Yuan in 2022 (Textor, 2023). This increased purchasing power has led to a rise in consumerism, with a growing middle class shifting its focus from basic needs to luxury goods such as cosmetics.

In contrast, the mature U.S. economy has witnessed moderate growth. Despite being the world's largest industrialized economy with the highest GDP (23.32 trillion USD in 2021) (Data Commons, 2021), its cosmetics market growth pales compared to that of China. Nevertheless, U.S. cosmetics sales reached 387 billion USD in 2021 (Petruzzi, 2023c), indicating robust consumer demand, which presents a promising future for the cosmetics industry.

### Social Media Analysis

Social media platforms, evolving as key marketing channels, have shaped the cosmetic industry's growth in both the U.S. and China. With 34% of the population having internet access (Internet World Stats, 2022), social media has gradually replaced traditional media (Mangold & Faulds, 2009).

In China, platforms like Weibo, Red, and WeChat Moments are leveraged by firms for marketing, yielding closer relationships with consumers (Man & Rahman, 2019). While U.S. firms also heavily rely on social media for product promotion, variations in consumer preferences necessitate differing advertising strategies.

### Culture Analysis

Consumer habits, particularly in distribution channels for cosmetics products, significantly vary between China and the U.S. China's advanced E-commerce infrastructure, with platforms like Taobao, T-Mall, and Douyin, dominates the cosmetics market, hosting significant shopping festivals such as the November 11th (Double-Eleven 11-11) and June 18th Festival (6-18) (Liu, 2021; L. Wang, 2022). In contrast, U.S. cosmetics sales are predominantly through independent brand websites and Sephora, with a lower frequency of promotional shopping festivals, indicating a less robust online shopping system.

Considering these cultural and market differences, firms adapt their advertising strategies accordingly. This study aims to analyze the key differences in marketing strategies between the U.S. and Chinese markets to facilitate the expansion of emerging niche brands.

## RESEARCH METHOD

This comparative study delves into the U.S. and Chinese cosmetics markets, using qualitative literature review techniques to augment the analysis of contrasting marketing strategies and analyze the trend of promotional strategies across time in these two regions. The primary databases used were Google Scholar, Scopus, and Statista. Google Scholar served as an essential platform to access various of documents and articles, and Scopus was selected to access peer-reviewed papers, providing a high-quality base for this research (Snyder, 2019). Statista provides a wealth of statistical resources for collecting evidence of market growth and marketing reports. These three resources provide a robust selection of materials to construct this research.

After conducting comprehensive research on the promotional strategies of the U.S. and Chinese cosmetics markets and L'Oréal promotional strategies over time by going through more than 50 literature reviews and exploratory analysis, the research is split into two main segments. The initial segment examines promotional strategies and their crucial variations within the U.S. and Chinese cosmetic markets. Subsequently, case studies are presented to illustrate the application of diverse promotion channels within these two countries. The primary objective of this research is to offer a comprehensive understanding of the contemporary market and draw comparisons between these two significant cosmetic industry markets.

## FINDINGS AND DISCUSSION

The principal distinction between the U.S. and Chinese cosmetic markets lies in the varied approaches each employs in promotional channels. Both countries leverage distinct promotional channels to advertise their products, choosing from traditional, digital, and social media platforms, influencer marketing, ecommerce & live streaming, and discount strategies. The following sections will delve into the characteristics of these promotional channels and their respective market applications.

### Traditional Media

Developed in the pre-digital age, traditional media does not hinge on internet usage and includes platforms like television, magazines, newspapers, handouts, radio, posters, billboards, and direct mail. These platforms facilitate one-way communication between businesses and consumers, aiming to engage consumers at physical locations. However, traditional media has experienced a substantial decrease in usage over the past two decades due to digital social media's ascent and Millennials' growing influences. Digital social media offers businesses a more cost-effective way to promote products, thereby reducing duplication costs for newspaper producers and consumer costs. Consequently, a transition from traditional to digital media has been observed among both parties (Ahlers & Hessen, 2005).

Despite the decline in traditional media activities due to technological advancements and reduced print media demand, it still maintains a significant role in advertising. Traditional media can target individuals based on their preferences and characteristics effectively. By employing demographics, companies can target audiences by age, gender, and income level, etc. Direct mail also enables companies to reach potential customers within a certain vicinity of their stores, leading to substantial returns from their advertisements. For instance, research by the Data & Marketing Association reveals that direct mail's return on investment is 29%, nearly equivalent to social media's 30% (Dencheva, 2023). Moreover, technology development has made traditional media trackable, allowing companies to gauge response rates to their advertising strategies by using QR codes and website URLs on posters (Conquestgraphics, 2022).

Traditional media has had a notable impact on the cosmetic industry. For instance, L'Oréal's slogan "Because you're worth it" (Nast, 1999) went viral across media channels like television,

newspapers, and billboards. Due to this slogan's effectiveness, L'Oréal's advertisement expenditure increased by 40% within a decade, leading to a significant rise in their revenue (Faria, 2023b). However, traditional advertisements have faded from public view due to shifts in technology and promotional channels and increased advertisement spending.

Even though traditional media continues to be used for advertising across the industry, the significance of digital marketing and other marketing strategies has grown exponentially due to technological advancements.

### **Digital and Social Media**

Digital social media, based on internet use, has shown stable and sustainable development in recent decades. This type of media enables businesses to engage consumers by generating compelling and informative content accessible through various platforms and devices. The U.S. and Chinese cosmetic markets both utilize digital social media to advertise their products, yielding satisfactory sales results.

In the Chinese market, Xiaohongshu (Red), Weibo, and Douyin are the primary promotional platforms in the cosmetic sector. With over 68% of China's population using social media in 2021 (Thomala, 2023), companies have an excellent opportunity to reach potential consumers effectively. Cosmetics brands use different methods to promote their products on social media, including official accounts, banner and open-screen ads, and targeted algorithms based on consumers' browsing history.

Conversely, in the U.S. market, businesses use platforms like Instagram, Google Ads, and Youtube to advertise their products. Companies also employ Google Ads and Search Engine Optimization (SEO) to expand their consumer base, drive traffic to their official websites, and boost sales (Google Ads, 2022). Additionally, businesses in the U.S. cosmetics industry use YouTube ads to show their products' texture, packaging, and effectiveness. They also benefit from shoppable advertisements that increase their conversion rate and sales (O'Hara, 2021).

Both markets use varied strategies to promote their products. The Chinese market predominantly uses Xiaohongshu (Red), Weibo, and Douyin, all with over 100 million monthly users by 2022. The U.S. market relies on Instagram, Google Ads, and YouTube to advertise their products, effectively covering all internet users with varying consumer preferences. Careful platform selection is vital for cosmetics companies to optimize their product promotion and achieve higher revenue.

### **Influencer Marketing**

Influencer marketing, a subset of social media marketing, leverages individuals who can sway consumers' purchasing decisions with their social media content (Geysler, 2017). These influencers primarily operate on platforms such as Douyin, Weibo, and Red in China, whereas in the U.S., they favor TikTok, YouTube, and Instagram. Companies turn to influencers, who include Key Opinion Leaders (KOLs), celebrities, and entertainers (Influency, 2018), for product recommendations and reviews due to traditional advertisements lose their effectiveness and credibility.

In the Chinese market, influencers such as celebrities, KOLs, and social media entertainers play a pivotal role in promoting products, creating a strong, trustworthy relationship with consumers, and reaching over 50 million potential customers via social media (Barta et al., 2023). For instance, the mega-influencer Jiaqi (Austin) Li sparked enormous consumption in the cosmetic market using his live stream slogan "Oh My God! Buy It!" amassing over 250 million views during the Singles' Day shopping festival. This exemplifies the transformative power that influencers can have in this market, contributing to a staggering 11.1% conversion rate (Ma, 2022).

The mid-tier and micro-influencers, boasting followers ranging from 50K to 500K, apply soft advertising in their everyday posts and utilize paid ads along with videos to introduce products to the public. These influencers are perceived as knowledgeable specialists, thereby enhancing company sales and conversion rates. Similarly, celebrities have a significant effect on consumers, bolstering the product's credibility and, in turn, improving sales. It is worth noting that about 49% of social media users are celebrity fans and actively purchase celebrity-endorsed products (Tong, 2022).

In the U.S., influencer marketing has taken the industry by storm. In 2020, companies invested 36.0% in TikTok influencer marketing, a figure that rose to 42% in 2021 (Barta et al., 2023). Influencers can significantly impact online purchasing decisions, with 66% of consumers turning to online comments and reviews of products (AstuteAnalytica India Pvt. Ltd., 2023). This shift toward influencer marketing can be seen in businesses like Glossier and Estee Lauder, which have significantly invested in influencer marketing.

In conclusion, influencers serve as bridges connecting businesses and consumers. The influencer market is a burgeoning industry, valued at USD 13.8 billion in 2021 (Dencheva, 2023a). Despite different strategies and consumer preferences in China and the U.S., the importance of influencers in advertising cannot be understated.

### **E-commerce**

E-commerce, the online transaction of goods and services, provides a convenient shopping alternative for customers, albeit without the physical in-store experience. The E-commerce landscape in China is more diversified than that in the United States, with platforms like T-Mall, Taobao, Doushop, and JD.com being the leading distributors of cosmetics. These platforms create a competitive market, housing a vast array of cosmetic products.

Contrarily, the U.S. E-commerce ecosystem operates differently, with businesses typically managing their online operations via their official websites. Sephora and Ulta Beauty are the two main retailers in the cosmetic market (Terakeet, 2021), shaping a duopolistic market. Both Sephora, which had a revenue of 2.3 billion USD in 2021 (Stanley, 2022), and Ulta Beauty, which earned 1.889 billion USD in 2022 (Stanley, 2022), use innovative methods to enhance consumer engagement and increase sales.

In conclusion, the E-commerce systems in China and the U.S. differ significantly. China's unified e-commerce system allows consumers to purchase a variety of products from one site, whereas the U.S. market is more fragmented. Despite these differences, both markets underscore the importance of personalized offers to retain customers.

### **Digital Coupons (E-Coupons) and Promotional Deals**

Digital coupons or E-coupons, which offer discounts, deals, and promotional incentives, is the digital tools intended to stimulate product purchases (BigCommerce, 2020). Delivered via social media or email, they enhance online sales conversion rates and foster customer loyalty (Ackner, 2020). With a longer validity than traditional paper coupons, E-coupons, bolstered by technological advances, have become an increasingly popular tool for product promotion (Kang et al., 2006).

The Chinese market has shifted from E-coupons to grand discount events like the Double Eleven (November 11th) and Six One Eight (June 18th) shopping festivals, aiming to revitalize retail consumption, particularly in the post-COVID-19 era (Global Times, 2022). Apart from E-coupons offered by malls, the cosmetics sector heavily relies on attractive deals on E-commerce platforms like T-Mall and JD (GMA, 2022). Promotional events occur frequently throughout the year, from the New Year Festival to Valentine's and Mother's Day promotions, the Mid-year (618) Festival, and the Double Eleven and Double Twelve events. Each month, Tmall and Taobao host promotional

festivals targeting distinct consumer groups. Brands often offer significant markdowns, with discounts of up to 60% during the 618 shops festival, accompanied by "Buy one, Get one Free" offers, samples, and gifts (Wang, 2022). In 2022, the 618 Festival saw cosmetic sales of the over 41 billion Yuan (Zheng, 2022). Although international brands like Estee Lauder, Lancôme (L'Oreal), and Shiseido topped the sales, some local brands such as Color Key, Florasis Beauty, and Perfect Diary are gaining ground (Cosmetic Watch, 2022). These promotional festivals drive vast sales, facilitate growth of both local and international brands, and underpin a competitive cosmetic culture in China.

In contrast, the U.S. E-commerce cosmetic market features less frequent promotions and fewer discounts. In the U.S., rather than relying on promotional codes and discounts provided by companies and E-commerce platforms, consumers actively seek promotional coupons on social media and rebate-focused apps and websites like slickdeals.net (Statista Research Department, 2022). More than 83% of U.S. consumers use coupons, particularly for everyday purchases (Thau, 2013). Despite the Sephora Spring Savings Sale, Daily Sale, Holiday Sale, and Black Friday Sale, the U.S. trails China in the frequency of promotional events (Jolene, 2023). Primarily, promotional deals and E-coupons in the U.S. are offered via official E-commerce websites and in collaboration with influencers partnered with cosmetic brands.

In summary, the frequency and scale of discounts and promotional events differ considerably between the Chinese and U.S. markets. Chinese E-commerce platforms provide regular promotional festivals with substantial discounts, stimulating consumer spending and increasing market exposure for brands. In contrast, the U.S. market offers fewer promotional events, leading consumers to seek discounts via third-party websites. These distinctions necessitate different marketing strategies for businesses operating in each market.

## DISCUSSION

L'Oréal S.A., a leading French cosmetics enterprise, offers products across a diverse range of beauty segments, divided into four primary divisions: Professional, Consumer, Luxe, and Active Cosmetics. L'Oréal boasts 36 subsidiaries, and its most recent activity saw it acquire the Australian luxury cosmetics brand Aesop for 2.53 billion USD in April 2023. Having first penetrated the U.S. market in 1953, L'Oréal had generated revenue of 7.5 billion USD by 2019 (L'Oréal USA, 2023). Subsequently, it entered the Chinese market in 1997 (L'Oréal, 2023), and by 2021, with a market share of 12.2%, it emerged as a leader in the Chinese cosmetics industry (Ma, 2022a). In both countries, L'Oréal utilized distinct marketing strategies to garner significant sales.

In China, 26 years post-entry, L'Oréal endeavored to maximize its market share by leveraging the burgeoning digital and influencer marketing channels. The company utilized a multi-pronged approach that encompassed digital social media marketing, influencer marketing, live streaming, and enticing discounts via E-Commerce platforms. Initially, L'Oréal garnered widespread recognition through traditional media using their famous slogan "Because You're Worth It," translated into Chinese. With the advent of the digital age in 2010, L'Oréal China refocused its strategy toward digital marketing (Y. Wang, 2022). The company capitalized on three primary elements: E-Commerce, Data Technology, and Consumers, which facilitated their robust growth in the Chinese market (Y. Wang, 2022). By 2022, L'Oréal commanded nearly 27% of the E-Commerce cosmetic market (L'Oréal China, 2022). Leveraging the burgeoning popularity of live streaming, L'Oréal integrated KOL marketing, driving increased traffic to their online media and E-Commerce platforms. During the recent Taobao Double-Eleven shopping festival, live streaming by Jiaqi Li helped L'Oréal achieve sales of 1.492 billion yuan (approximately 212 million USD), with over 800,000 units of the L'Oréal Fresh Mix Ampoule Replumping Mask sold. The event saw L'Oréal offer significant discounts and samples, bolstering consumer engagement (Lian Xian Insight, 2022).

Online sales, incentivized by such discounts, were seven times higher than in-store sales (Y. Wang, 2022), strengthening L'Oréal's commitment to digital platforms. Thus, in China, L'Oréal successfully fused influencer marketing with live streaming and compelling deals during shopping festivals, setting new sales records and consistently expanding their market share.

In contrast, in the U.S. market, L'Oréal employed a different approach. Despite harnessing digital and influencer marketing strategies similar to those in China, the company varied its promotional channels. L'Oréal has invested over 2 billion USD annually in advertising (Faria, 2023a), relying heavily on traditional marketing means, such as television advertisements, billboards, and posters, to increase its brand awareness. As a significant player in the North American market, L'Oréal increased its market share to 10.3% in 2021 (Global Data, 2022). The company recognized the importance of fostering a diverse and inclusive culture, given the growing trend of globalization. L'Oréal's "Dream Team," composed of people from varied professions, origins, and backgrounds, exemplifies its commitment to diversity and serves as a vehicle for product recognition (L'Oréal Paris USA, 2023). As digital advancements led to the emergence of E-Commerce platforms, digital coupons, and deals, L'Oréal USA adopted new marketing strategies to align with technological improvements. The company focused on digital marketing and influencer marketing, building strong relationships with influencers to amplify its online presence, allowing consumers to access transparent information about L'Oréal products (L'Oréal Group, 2019).

### **Practical Applications:**

As evidenced by the L'Oréal case study, Chinese firms have transitioned from traditional marketing strategies to omnichannel approaches. This involves the integration of E-commerce, live-streaming, and influencer marketing to form a sophisticated marketing ecosystem for the contemporary cosmetic industry. L'Oréal China successfully boosts its sales through frequent discount festivals like 618 and Double Eleven on major E-commerce platforms such as Taobao and T-mall, facilitating a wider consumer reach and fostering brand loyalty. Conversely, promotional strategies in the U.S. are less combined. With fewer discounts and deals offered on E-commerce platforms and promotion-oriented live-streaming yet to gain momentum, the U.S. market could benefit from an enhanced online shopping environment. This could be achieved by introducing more discounts on E-commerce platforms and integrating influencer marketing to augment online visibility, thereby enabling consumers to gain deeper product understanding and potentially driving future sales.

### **CONCLUSIONS**

Five main promotional strategies have been discerned in both the U.S. and Chinese cosmetic industries to enhance product visibility and bolster brand awareness. Traditional media, encompassing television and billboards, initially served as the prime marketing channel before the advent of digital media and advanced technology. However, companies in both regions have gradually pivoted toward digital promotional strategies, with China embracing this transition at a faster pace. Predominantly, Chinese firms leverage social media, influencer marketing, and E-commerce platforms. They have also begun to amalgamate influencer marketing with digital coupons and E-commerce platforms to broaden their consumer reach. Conversely, in the U.S., despite fewer E-commerce platform choices and promotional discounts, firms continue to value traditional media, employing billboards and conventional advertisements to build brand recognition. Moreover, consumer preferences in the U.S. vary, particularly regarding the adoption of live-streaming culture, which contrasts starkly with China, where live-streaming has become an integral marketing channel for cosmetics firms.

Taking L'Oréal, one of the leading giants in the cosmetics industry, as an example, this paper

highlights the distinct marketing approaches between the Chinese and U.S. markets and the unique opportunities that arise from these differences. At the present stage, China's market leans more toward digitalization, employing different E-Commerce tools to boost sales. On the other hand, the U.S. market continues to prioritize traditional marketing tactics. This study provides novel insights and methodologies that address existing gaps in knowledge. This paper expands on various technologies and methods of marketing strategies employed in China and the U.S. by doing so, it validates previous scholars' findings and proposes new hypotheses for further exploration. Additionally, the study identifies potential areas for future research, encouraging continued exploration and innovation in the field. Future studies could investigate how marketing strategies evolve over time for small or local enterprises and could broaden the scope to include other market segments, offering a holistic view of the shifts in marketing strategies.

### **LIMITATION & FURTHER RESEARCH**

This research primarily focused on comparing top brands in China and the U.S., neglecting smaller players. These lesser-known brands may lack substantial market power and, as a result, could opt for different promotional strategies to sustain brand awareness and boost sales. Additionally, this research focused exclusively on promotional strategies for multinational corporations, which may not necessarily apply to local brands due to disparities in market share, revenue, and company size.

While this study provides a comparative analysis of promotional strategies in the cosmetics industry in the U.S. and China, further research is required to delve deeper into various facets that have not been fully explored. Specifically, the exploration of promotional strategies employed by smaller or emerging brands in these markets can be undertaken to understand their unique challenges and innovative solutions. Additionally, it would be beneficial to investigate how local brands in both countries develop and implement promotional strategies, particularly as they strive to compete with multinational corporations. Research could also be extended to other sectors to evaluate whether the findings from the cosmetic industry are industry-specific or can be generalized. Another potentially fruitful avenue would be examining consumer behavior and preferences in more depth. This could involve studying consumer responses to different promotional strategies and how these responses are affected by cultural factors and regional characteristics. Ultimately, each of these research directions could provide a more nuanced understanding of promotional strategies in different markets, contributing to the development of more effective, targeted marketing practices.

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