

Marketing Strategies of Chinese Cosmetic Brands in Local Market: A Case Study of Florasis

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ABSTRACT

The beauty market in China has a broad prospect with a growing market share. Among new brands rooted in China, Florasis witnessed a rapid increase in sales relying on the Chinese traditional culture. Therefore, it is of great importance to look into the ways Florasis has made this success through marketing strategies. On this purpose, we used three different methods including literature analysis, survey and in-depth interview to find Florasis's performances and consumers' feelings. An online questionnaire was used to collect information about Florasis. To evaluate the current marketing strategies of Florasis, we chose 4P theory (products and services, pricing, places and promotion). We found that Florasis has a clear position, filling the gap of mid-to-high-end domestic brands in season. Besides, it has deeply cooperated with some top KOLs to gain huge amount of exposure. Apart from this, some disadvantages are also found, e.g., insufficient qualities, distrust and annoyance from overdone promotion, absence of off-line stores etc. Corresponding suggestions are offered that one need to invest more on R&D, focus more on ordinary people's real experiences and setting up off-line stores. These results shed light for Chinese cosmetic markets.

Keywords: Florasis, marketing strategies, cosmetic products, Chinese brands, Chinese cosmetic market

1. INTRODUCTION

China is one of the biggest cosmetic markets around the world with great potential. According to Euromonitor data ^[1], the market size of Chinese cosmetic industry reached 477.7 billion yuan in 2019, accounting for 14% of global cosmetic sales, only second to the United States. The year-on-year growth rate is 13.38%, higher than the global average. Besides the excellent performance, potential is huge as the average expense per capital on cosmetic products in China is only \$50, lower than the global average. There is still much room for growth. When it comes to players in this market, despite decades of dominance by foreign brands, Chinese make-up brands are growing rapidly contemporarily. According to National Beauty 2019 Insight Report ^[2] released by Tencent Advertising, the market share of local cosmetic brands in China reached 56%. Within only four years since establishment, the

Gross Merchandise Volumes (GMV) of the top two brands, Perfect Diary and Florasis, have exceeded 3 billion Yuan in 2020. As for financial activities, several top brands with less than 5 years of history have gone public, e.g., Perfect Diary and Winona. Besides Initial Public Offering (IPO) events, investments heat up on these brands, which can testify the great value of Chinese local cosmetic brands from another side.

As for the existing research in this field, some are focused on the features of the target groups' preferences and behaviours concerning with makeup purchasing. For example, Lu and Liu found that Chinese women preferred to gain product information through both social platforms and offline stores because they believed these two sources are reliable. Moreover, age, education and job would have a strong impact on their choices of information sources ^[3]. An empirical study done by Ma and Yang revealed that among price, quality of products and delivery time, price is the most influential factor in

female e-shopper's satisfaction with cosmetic products in north-western China ^[4]. Some organizations have conducted research on the general trend, major customers and popular marketing strategies in this industry. For example, CBNDData, together with Tmall Gold Cosmetics Award, released "The Road to Tmall Domestic Cosmetics, 2021 Beauty Industry Trend Insight Report" ^[5]. Other scholars are interested in the legends of successful brands. "The light of domestic products"-Perfect Diary are discussed most frequently. Li did a marketing analysis for it, introducing several operating advantages in detail and analysing its current problems ^[6]. Wen, Lv and Zhang analysed its marketing strategies from the perspective of new-media marketing ^[7, 8]. Older brands are also attractive to researchers. For example, Liu laid his attention on the cross-border marketing activities of the household name Pechoin born in 1931, indicating that taking advantages of big festivals, cultivating the spirit of ingenuity and combining online and offline platforms are major method contributing to its success ^[9].

However, few studies have touched upon another tier one local cosmetic brand, Florasis. According to public data, the revenue of Florasis was 1.8 billion yuan in 2020 and it aimed to gain the GMV of 5 billion yuan in 2021. In several months last year, its sales have exceeded the top one brand, Perfect Diary. With such a great market performance, it was estimated to be the next Chinese cosmetic brand to go public and the champion Chinese cosmetic brand in the future. Its marketing campaigns and brand positioning are also impressive and worth discussing, which may arouse inspirations for other brands.

Therefore, this study is going to fill this gap and shed lights on Florasis. Based on literature analysis, survey and in-depth interview, the current situation and future trends of the Chinese cosmetic market are analysed in domestic make-up industry. Then, we will evaluate the current performance of Florasis with the 4P marketing model and analyse the advantages and disadvantages of its current marketing strategies. Finally, based on our first-hand data and secondary research, we will summarize three lessons other brands can learn from Florasis and offer our advice on how to further improve the marketing strategies of Florasis. The research results can not only help Florasis design the future blueprint, but also help other brands to understand Chinese cosmetic market and make their own success.

2. METHODOLOGY

2.1. Literature Analysis

Literary analysis means closely studying a text, interpreting its meanings, and exploring why the author made certain choices.

According to some domestic cosmetics brands reports, it is found that beauty and skin care market in China has a broad prospect. Florasis has become the first new domestic cosmetics brand to gain a foothold in the mid-to-high-end cosmetics market. Thus, we chose this brand as a typical and valuable case to study the marketing strategies and wanted to find future optimization measures of it.

We also looked into the Florasis's yearly analysis reports, which shows how they design the portfolio, how they position the brand and products, how they use social media to shape the brand image of "Chinese style", and sales data of the brand during certain periods. Half of our basic data came from these reports.

Apart from that, some articles about marketing strategies of domestic beauty products are referred when defining the research scope and deciding research methods.

2.2. Survey

Survey method studies the sampling of individual units from a population and the associated survey data collection techniques, e.g., questionnaire construction and methods for improving the number and accuracy of responses to surveys. We designed a questionnaire to explore the features of target consumers of Florasis and their feedbacks about the brand. A total of 367 questionnaires were collected, of which 360 were valid questionnaires.

2.3. In-depth Interview

In-depth interview is a type of one-on-one interviews, which includes long duration and is good for understanding details. After the questionnaire was issued, we selected ten senior users of the Florasis and conducted in-depth interviews to discuss more deeply the questions involved in the questionnaire, so as to obtain more details about costumers' thoughts.

3. RESULT

3.1. Analysis of the Development and Trend of the Beauty Industry

According to Domestic and international cosmetics and skin care brands and research status reports in 2020, one knows that the beauty and skin care market in China has a broad prospect. At this stage, the skin care market is the largest, and beauty products have the fastest growth rate. The proportion of online sales channels is increasing year by year, and the epidemic has accelerated the digital transformation of brand marketing ^[10].

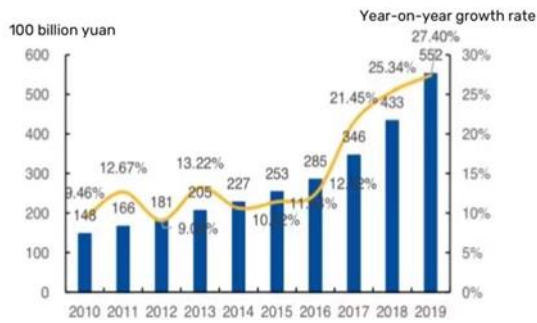


Figure 1 The scale and year-on-year growth rate of cosmetics in the Chinese market (100 million yuan) [10]

In 2019, the size of Chinese cosmetics market reached nearly 60 billion, and year-on-year growth is the highest. The turnover of online and offline channels was close to 90 billion. Moreover, online channels have become an important sales channel for the cosmetics products. Since 2015, the core e-commerce platforms represented by Taobao have actively introduced beauty brands. Taobao has made great efforts to introduce high-end brands. In the same year, it also began to hold the “Tmall Golden Makeup Award” to continuously stimulate the awareness of competition between various products and brands in sub-categories and put domestic products in the same arena. From 2017, Taobao began to raise the entry threshold of domestic products on the one hand, and retired low-end beauty brands with substandard sales and low self-conversion rates. In 2018, Taobao established a dedicated team for incubating emerging brands and support for small and medium-sized brands [11].

Table 1. Vital supporting policies of measures in Taobao

Timetable	Important Policies or Events
2015	<ul style="list-style-type: none"> Established the Tmall Golden Makeup Award, bringing together popular beauty brands from various platforms; Start to introduce high-end brands.
2017	<ul style="list-style-type: none"> Raise the entry barriers for domestic brands, and gradually remove low-end beauty brands; Support the development of niche and cutting-edge brands.
2018	<ul style="list-style-type: none"> Establish an incubation team for cutting-edge brands to provide support for small and medium-sized brands.
2019	<ul style="list-style-type: none"> Start the Juhuasuan project for large-scale outstanding brands.
2020	<ul style="list-style-type: none"> Create a new track of "New Power of Domestic Products";

<ul style="list-style-type: none"> Establish a long-term beauty plan with 12 beauty brands to create a new incubation base; Initiated the "New Brand Growth Plan", planning to help 5,000 brands become industry leaders within 2 years.
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Thanks to a series supporting policies, in 2020, the online scale is expected to exceed 50 billion yuan. Chinese online cosmetics market was less than 10 billion yuan in 2015 but experienced a rapid growth in the following 4 years. Due to the COVID-19, it dropped down a bit but in the later month, The growth rate of cosmetics sales has returned to the medium-high speed, 20%. The annual cosmetics sales of Taobao and JD.com exceeded 50 billion.

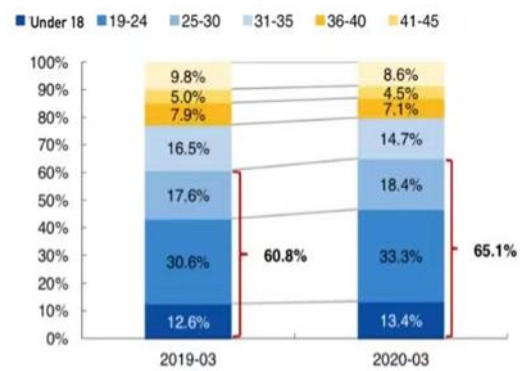


Figure 2 Age distribution of beauty industry [10]

Besides, Generation Z (born in 1996-2005) and The Millennials (born from 1986 to 1995) reached 171 million and 232 million, respectively, accounting for nearly 30% of the total domestic population. The purchasing decisions of these two groups are largely influenced by KOL contents on social media platforms, which are the core target groups for makeup dissemination. In 2019, Generation Z and Millennials bought 58.5% of China's beauty products and more than 70.0% of online beauty products. In domestic makeup consumer group, a trend of youth could be witnessed.

In conclusion, development and trend of the beauty industry has three clear features, sustained high growth of the market, support from e-commerce platforms, and the expansion of makeup crowd and younger generation.

3.2. The Performance of the Current Marketing Strategies of Florasis

3.2.1. Research Design

To investigate how the strategies are received by the target customers, we have designed an online questionnaire consisting of four main parts: a. questions about basic segmentation variables including gender,

age, job, location, monthly income and frequency of wearing makeups, to ensure this respondent belong to the target group; b. questions about behaviours associated with the purchasing of Florasis and other cosmetic products; c. questions about psychological movements associated with the purchasing of Florasis and other cosmetic products; d. for those who have bought at least one product of Florasis, questions about their assessments and comments on what they've bought. After integrating real consumers' feedbacks, we have gleaned corresponding information about the brand germane to certain topics from secondary research and other sources available on the Internet. With all information mentioned above examined, the advantages and disadvantages of current marketing strategies are analysed at last.

3.2.2. Data Collection

We have distributed a total of 367 online questionnaires, with 360 valid ones collected. The qualified participants are carefully chosen with diversified monthly income, locations (all in China) and frequencies of putting on make-ups. All of them are females aging from 20-25, which are the main targets of the brand. Most of them are students, others are junior workers.

3.2.3. Data Analysis

We are going to evaluate the performance of the current marketing strategies of Florasis from four perspectives: product and services, price, place and promotion, the classification based on the 4P theory raised by Jerry McCarthy, which is a demonstrated classic marketing model [11].

3.2.4. Overview

Within three years, Florasis has grown into domestic head makeup brand. In the early days of its establishment (2017-2018), Florasis produced a number of products such as eyebrow pencil and loose powder and carried out small-scale promotion attempts. In October 2018, a new product launched in the Li Jiaqi live broadcast. In that year, the air loose powder ranked first in double eleven festival store sales, with more than 20,000 pieces sold. 2019 was seen as an important turning point for Florasis, as it entered Tmall Double ELEVEN Makeup Category TOP 10; in 2020 Florasis surpassed Perfect Diary and a number of international big names and ranked Tmall Makeup Category TOP 1. In 2020, it won the second place in the Tmall makeup category with a turnover of 450 million on double eleven festival, and the brand size is expected to jump to more than 3 billion in 2021, making it the second largest national cosmetics brand after Perfect Diary.

3.3. Analysis Based on the 4P Theory

3.3.1. Product

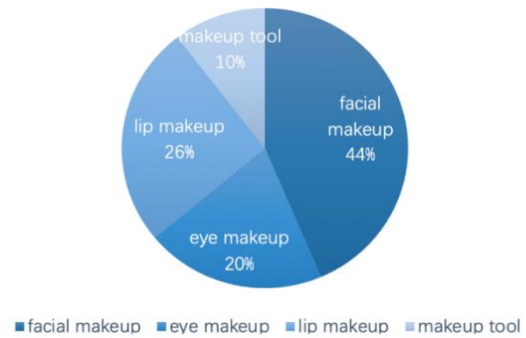


Figure 3 Proportion of Florasis's products bought by customers

Table 2. Products offered by Florasis

Facial makeup	Loose powder
	Air cushion CC
	Primer
	Setting spray
	Concealer
Eye makeup	Eyebrow pencil
	Eye liner
	Eye shadow
	Mascara
	Eyelash curler
Lip makeup	Lip stick
	Lip mask
Makeup tool	Makeup remover wipes
	Beauty blender
	Makeup brush

Florasis offers a wide range of products including facial makeups, eye makeups, lip makeups and makeup tools, covering the entire process of putting on makeups. The specific products in each category are listed in Table 2. As displayed in 3, the proportion of Florasis's products bought by customers according to our survey, from which we can find that facial makeups account for 44% of the sales, ranking the first, followed by lip makeups (26%).

It's no wonder that these two categories are better received by customers as they lie at the core of the brand's portfolio. The top star product of Florasis is the air powder. Based on plant formula, it is announced to be delicate and fine, with long-lasting effects of oil control and sustaining other makeups. Another star is a series of lipsticks with refined classic Chinese patterns carved on the paste and elegant packages of intense

Chinese flavor. Florasis is the first brand in Chinese market to have etched patterns, particularly Chinese totems, on the makeups, arousing great interest and popularity among Chinese people. According to our results, 78.9% of customers take efficacy into consideration when buying cosmetic products while 63.4% value outlook, maybe that explains why the air powder and lip stick series perform well.

3.3.2. Price

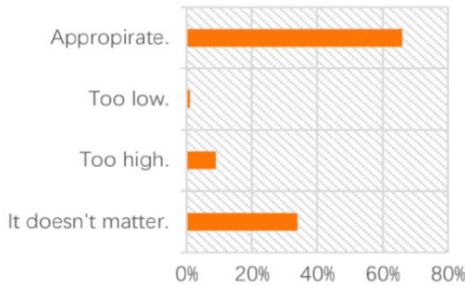


Figure 4 Customer's views on Florasis's Price

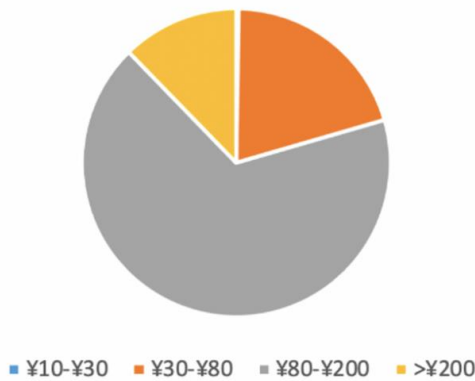


Figure 5 Transaction Prices of Florasis's Products (May 2020 – Oct. 2020) [11]

Based on the results, 77.3% of respondents reported that price is an important factor influencing their purchasing intentions and 67.4% thought the price of Florasis was appropriate, which indicates that most target customers of Florasis are satisfied with its price.

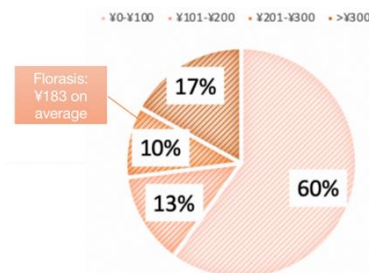


Figure 6 Price of Powders offered by Top 30 Brands (2017.11) [11]

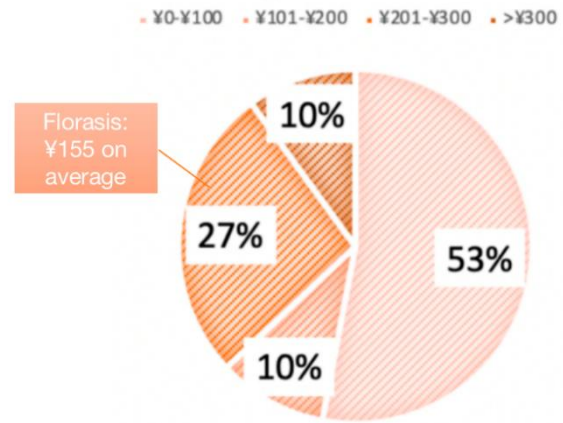


Figure 7 Price of Lipsticks offered by Top 30 Brands (2017.11) [14]

Based on the statistics done by Data Insider Consulting, the proportion of different range of transaction price of Florasis from May 2020 to Oct. 2020 is shown in Fig. 5. One sees that most transaction prices fall into the category of ¥80 to ¥200, with over 12% above ¥200 and only less than 1/5 below ¥80. In terms of its price, we consider Florasis as a medium- and high-end cosmetic brand, which is rare in domestic brands at that time.

As for the specific price for major products, the average price of air powder is 183 yuan and for lipstick 155 yuan, filling the gap at ¥101-¥200 where less products and players are aiming at in 2017 when Florasis was established, as illustrated in in Figs. 6 and 7.

3.3.3. Place

Online retailers became our only focus, since Florasis has no actual stores in China. Florasis entered Taobao in 2017. The DSR index is an important indicator for Ali to judge the behavior of the brand, and Florasis performed well.

For Florasis, there are four major sales places, Taobao, Jingdong, Pinduoduo, and overseas online platforms. We asked where young females have bought products of Florasis and found that, most of our subjects bought them from Taobao (76%). Some girls also purchased makeup products from Jingdong and overseas online platforms, representing 6% and 14%, respectively. Pinduoduo only accounts for a small proportion, with just 4%.

In literature analysis, live broadcast in Taobao played an important role for this brand. Florasis has formed a cooperative relationship with the head anchor Li Jiaqi in the early days to fully enjoy the explosive dividends of live broadcast e-commerce. It officially interacted with Li Jiaqi as early as 2018. In 2019, with the outbreak of Taobao live broadcast and Li Jiaqi's exit,

Florasis became the first brand to enjoy the live broadcast bonus.

Sales in Taobao increased from more than 10 million in January 2019 to 250 million in November 2019. In September 2019, the brand invited Li Jiaqi to serve as the chief recommendation officer and began co-creation on the products side. Some statistics showed that ^[11] Florasis and Li Jiaqi cooperated on live broadcasts at least 4 times a month in 2020, and the number of live broadcasts reached a peak one month before double eleven and other festivals. In terms of the number of single product live broadcasts, the TOP 1 product, air powders were broadcast live up to 20 times throughout the year.

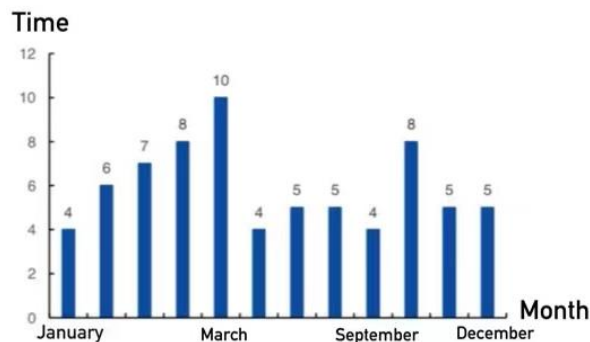


Figure 8 Number of Li Jiaqi's live broadcasts for Florasis in 2020 ^[10]

3.3.4. Promotion

Florasis has various marketing strategies on social media platforms and uses customized content to penetrate users on multiple platforms and multiple circles.

From our survey, 50% of people knew this brand from social media, like The Red and Douyin, while 24% of all got familiar with Florasis from live broadcast. Also, some knew it because of friends' recommendation or advertisements in other places.

As half of our subjects mentioned some social media like The Red, which is a trendy social platform dominated by young female users, we also did further study about that in the in-depth interview. One student from Shanghai told us that, in Red Book, she browsed an article about powder review posted by a KOL which mentioned air powder from Florasis, Nars and Bobbi Brown. The conclusion of that evaluation is that air powder of Florasis is better at oil control, also more natural, which is exactly what she wants from a powder. Some comments below also showed great passion for Florasis and plenty of applause could be seen. As a result, she placed an order from Taobao right after reading that.

In The Red, Florasis builds an online marketing matrix based on celebrities and top KOLs. It chose spokespersons that conforms to the brand's temperament, e.g., Dujuan, who has a classic face. Besides, top KOLs posted professional evaluation, makeup tutorial or made topics to improve brand recognition and credibility, like Li Jiaqi and SamChak.

Another girl in Beijing mentioned that she learned about Florasis from Li Jiaqi's live broadcast, during which they introduced Florasis's brand culture, some star products and then, indicating how to use air powder to maximize the effect.

Additionally, since 2017, short video platforms represented by Douyin and Kuaishou have become popular, and the average time users spend on these emerging platforms has increased year by year, providing a good medium for the dissemination of makeup products. From Douyin, some short videos that introduced how makeup of Florasis could make people more charming. Thus, we could see that Florasis has different marketing placements on multiple social media platforms.

4. DISCUSSION

4.1. Advantages of Current Marketing Strategies of Florasis

4.1.1. Clear positioning filling several gaps

The positioning of brand is successful in filling two gaps in Chinese cosmetic market in 2017. Firstly, with the average prices of 100 yuan to 200 yuan, it has filled the gap of mid-to-high-end domestic brands. As shown in Figs. 6 and 7, only 13% of companies priced their powders at ¥100-¥200 and rather less companies (about 10%) marched on lipsticks at ¥100-¥200. In addition, it fills the gap of ancient Chinese fashion. In 2017, most local makeup brands are recognized as cheap and inferior copycats of major foreign brands. With no outstanding features or time-proof qualities, these brands never show up in the mainstream and were easily forgotten. Florasis, however, presented itself clearly a high-quality national style brand immersed with traditional Chinese aesthetics and culture. According to three of our interviewees, it's this one-of-a-kind style that impressed them and aroused their interests at first glance.

4.1.2. Comprehensive use of KOLs (Key opinion leaders)

Florasis has cooperated with KOLs of a great range of kinds. It has chosen three spokespersons; Jingyi Ju, a popular Chinese actress famous for outfits in ancient China costumes, Juan Du, a classical Chinese beauty, and Shen Zhou, a renowned singer skilled in popular

songs inserted with traditional Chinese elements. It has also cooperated with at least five more stars to promote the products among their fans. As for Leading KOLs on social media, it has hired the unmistakable top live streamer Jiaqi Li as the “Chief Recommendation Officer”, who, together with other leading KOLs, led the discussion, tested the efficacy and gave applying instructions of the products. Thanks to them, Florasis gained huge amounts of exposure overnight and become the champion in terms of accumulated sales of all products sold by live streams. It has also established partnership with many KOLs of small and medium influences diffused in nearly all social platforms in China, such as Weibo, the Red, Bilibili, Douyin and Kuaishou, to penetrate into certain small groups and amplify its voices.

4.2. Disadvantages of Current Marketing Strategies of Florasis

4.2.1. Poor effects of products

The effects of the major products of Florasis have much room for improvement. About 61.53% of customers unsatisfied with the brand reported that their disappointment came from the mismatch between the real effects of the products and those claimed in the advertisement. Among top ten complaint videos with the highest view counts on the social platform, 8 speak against its effects. Our in-depth interviews also point to this problem. For example, as for its star product, the air powder, six out of ten interviewees made negative comments on its quality, specifically poor efficacy of oil control and preserving other makeups.

4.2.2. Overdone promotion

As a double-edged sword, the pervasive advertisements backfired on this brand. Once a potential customer realized that so many KOLs making positive comments are hired by the brand to do so no matter how the real quality is, the good comments will be much less trustworthy, which is an obvious detriment to their buying intention. Moreover, too much promotion will render consumers’ expectations too high to live up with. According to one interviewee, when she found the real efficacy is far less than was expected, she was deeply disappointed and upset, thus generating rather negative feelings on this brand. Last but not least, too many advertisements with high frequencies appearing everywhere online and offline occupied people’s minds and were somewhat annoying. According to the survey, about 53% of customers unsatisfied with the brand reported that the promotion was overdone, and seven out of ten interviewees indicated that one reason they turn from Florasis is its overwhelming recommendations on social platforms.

4.2.3. Absence of off-line stores

According to our survey, 75.4% of consumers clarified that they inclined to try samples first before deciding which products to buy and 45.3% of them would like to undergo this process at a cosmetic counter where professional assistants are ready to introduce the products, demonstrate the best way to apply products and offer free samples proactively and warmly. When it comes to Florasis, however, it has never established an off-line store. 55.3% of our respondents thought that the absence of off-line store of Florasis makes it hard for them to try on the makeups. On this basis, it’s not convenient for to testify the real effects of the products and interact with the staff, thus hindering them from potential purchases.

4.3. Lessons

4.3.1. Differentiation from existing brands and products

Florasis succeeded in cultivating a brand-new brand with its style, product catalogues and price differentiated with its competitors and rapidly occupied the unexplored and unsaturated niche makeup market that has relish for traditional Chinese culture and can afford mid-to-high-end makeups. When a brand plan to enter a market, remember to design and showcase certain unique features, which can be triggers for a brand to become customers’ potential choices.

4.3.2. Building a brand image fit in with the social milieu

With the renewed cultural confidence and the development of technology in China, traditional cultural derivatives become more and more popular over the past five years. Meanwhile, the trade friction between the United States and China has encouraged patriotism, leading to Chinese people’s enthusiasm to support the development of the national brand. According to iMedia Research, in 2019, the recognition of new national brand among Internet users is relatively high, and more than 90% of users online expressed their willingness to support new national brand. The expectations are high-quality, affordable price and Chinese characteristics, which is particularly what Florasis claimed to offer. Without such an environment compatible to a brand’s positioning, it can’t make solid steps and grow rapidly.

4.3.3. Pioneering in the emerging sales channel conforming to technical trends

Now, one sees that the emerging sales channel, live stream, was a great contributor to Florasis’s success and even boosted the entire consumer industries. However, back to 2017, it’s an unexplored field that few marketers

dare to step into. In contrast, Florasis's decision-makers have rationally anticipated that with the popularization of videos, development of mobile communication technology, and strengthened capacities of logistics, the advent and legend of live stream is inevitable. They prove right that before making decisions concerning sales and promotion, marketers should analyse carefully the related technical trends to gain the optimal results.

4.4. Suggestions

4.4.1. To invest more on R&D

Innovation and quality are always priorities for the sustainable development of a brand and is now a major weakness of Florasis. The Company should invest more to develop product portfolios and improve the qualities of certain products, including strengthening the corresponding efficacy, making them more suitable for Chinese skin, making them compatible to other products and different situations, etc. Moreover, it should pay heed on the tactile and visual impression of its package, which is a strong factor influencing customers' experiences.

4.4.2. To convert from KOLs to ordinary people

To offset the side-effect of overdone promotion and get the trust back, the brand should focus more on ordinary people's real experiences. According to our survey, 85.2% of customers trust the experienced shared by whom they know while 45.4% deem public endorsements associated with commercial interests dubious. To let its potential consumers learn real entrusted positive feed-backs, the company can organize user groups in we chat, where consumers will know each other gradually and communicate their experiences. To expand the coverage of such groups, rewards should be given to those who have successfully invited a newcomer into a group.

4.4.3. To set up off-line stores

Apart from providing a place of buying, off-line stores can serve other important functions like showcasing the products, attracting potential audiences, distributing free samples and making efficient and valuable communications with customers. As for Florasis, to avoid fierce battles with counters established tier-1 brands in most department stores all over the country, it can set up independent flagship stores in the centre of main cities.

5. CONCLUSION

5.1. Main Findings

In summary, we found that Florasis has a clear position, filling the gap of mid-to-high-end domestic brands in season. Apart from that, Florasis has deeply cooperated with some top KOLs, like Li Jiaqi, to gain huge amount of exposure. We also saw some disadvantages, e.g., distrust, disappointment and annoyance derived from overdone promotion, poor product quality and lack of off-line stores. As innovation and quality are always priorities for the sustainable development of Florasis, the company should invest more to develop product portfolios and improve the qualities of certain products. Furthermore, the brand should focus more on ordinary people's real experiences. Additionally, off-line stores are extremely vital. These results offer a guideline for Chinese cosmetic brands developing.

5.2. Limitations

With the main research objects in questionnaire concentrated in the developed coastal cities, there is a paucity of samples coming from the middle and western parts like Gansu and Xinjiang province. Moreover, all revenue data came from online resources, which may not be precisely exact and not all are the latest ones. We tried to make up for it in the later in-depth interview, and find more emotional factors related to its marketing strategies that cannot be exposed easily in questionnaires.

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