

Beauty Devices - China - 2022

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

This report looks at the following areas:

- Market overview and growth of beauty device market in each segmentation.
- The ownership and usage of different beauty devices.
- Usage frequency of different beauty devices.
- Functions of skincare products used with beauty devices.
- Desired feature of skincare product used with beauty devices.
- Barrier for more frequent use of beauty devices.
- Motivation factors that could drive more frequent use of device.

The devices market has recorded a shrink in size after a few years of strong growth, it is also worth noting that lapsed users take up a significant proportion of current device owners (ranging from 23-34% across different devices types), suggesting a low utilisation of devices.

These lapsed users are swayed to alternatives such as skincare or facial treatments due to the unsatisfactory results of devices with troublesome usage. This signals that the brands cannot be sitting on their laurel and requires work in enticing consumers' continuous usage and delivering more irreplaceable benefits compared to the skincare products or cosmetic treatment.

To re-engage with these consumers, device brands are required to seek ways to enhance the results of device use such as leverage on complementary skincare products to optimise the efficacy, complete the solution toolbox and to generate a continuous revenue stream. Devices could also think beyond as not only a product provider, but as a complete beauty solution provider, offering an all-rounded solution that fosters consumers' loyalty to the brand.



“After a few years’ rapid growth, the market has recorded a decrease for the first time, reflecting consumers’ reserved attitudes in making large spending and their reluctance in purchasing devices with basic functions such as hydration or cleansing.”

– Renee Gu, Senior Analyst

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

OVERVIEW

- **What you need to know**
- **Covered in this Report**
- **Key issues covered in this Report**
- **Definition**
- **Excluded**

EXECUTIVE SUMMARY

- **Market and Competition**

Figure 1: Value sales and growth rate of total beauty devices market and each segment, 2021-22(est)

- **The consumer**

- **Lapsed users take up a significant proportion**

Figure 2: Product ownership and usage of beauty devices, 2022

- **Hydration and cleansing devices are used more often**

Figure 3: Usage frequency of beauty devices, 2022

- **Hydration and anti-ageing products are the most used with devices**

Figure 4: Functions of skincare products used with beauty devices, 2022

- **Skincare products could lend a helping hand on the use of beauty devices**

Figure 5: Desired feature of skincare products used with beauty devices, 2022

- **Lack of prominent results of devices drives consumers to seek alternative solutions**

Figure 6: Barriers for more frequent use, 2022

- **Complementary products and more proof of efficacies drive usage**

Figure 7: Features to drive usage frequency, 2022

- **What we think**

ISSUES AND INSIGHTS

- **Complete the package to provide all-round beauty solutions**

Figure 8: FLES product offering, Japan, 2020

- **Finding your comrade**

Figure 9: Team and community feature on Whoop app, US, 2022

Figure 10: Sisley referral program, UK, 2022

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

MARKET SIZE

- **Shrink in size amid the pandemic**
Figure 11: Value sales and growth rate of total beauty devices market, 2021-22(est)

MARKET FACTORS

- **Regulation is expected to tightened and raise the bar of entry**
- **Renting services offered**
Figure 12: Rental services offering, China, 2022
- **The willingness to pay a pretty penny on beauty devices is lower due to COVID-19**

MARKET SEGMENTATION

- Figure 13: Value sales and growth rate of total beauty devices market and each segment, 2021-22
- **Shaping and anti-ageing is still the most important segment**
 - **Awareness of preventing overcleaning leads to the further decrease of facial cleansing devices**
 - **Multifunction segment has decreased significantly in sales**
 - **Hydration devices may have lost their charm among potential new users**
 - **Skin treatment segment is increasing**
 - **Eyecare devices have sustained their growth**

MARKETING ACTIVITIES

- **Making beauty devices ornament-like**
Figure 14: AMRIO RF device V&A box set, China, 2022
- **Emphasise the technological know-how**
Figure 15: TriPollar Tmall product page, China, 2022
- **Trade-in and upgrade**
Figure 16: YAMAN Trade-in program, China, 2022
- **Offline stores to provide more all-rounded experience**
Figure 17: YAMAN offline store treatment offer, China, 2022

NEW PRODUCT TRENDS

- **Complete the package with product and device**
Figure 18: RÉDUIT Spa, France, 2022
- **From sports recovery to beauty**
Figure 19: Therabody TheraFace Pro, China, 2022
- **Incorporate skin analysis to help consumers better understand their skin conditions**
- **Utilisation of one technology to provide dual benefit**
Figure 20: Tmall product page of Silk'n, China, 2022

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

PRODUCT OWNERSHIP AND USAGE

- **Devices of basic functions top the highest usage rate**
- **Still, lapsed users are taking up a significant proportion of device owners**

Figure 21: Product ownership and usage of beauty devices, 2022

- **Eyecare devices attract younger generations more**
- **Over 60% of women used more than 3 types of beauty devices**

Figure 22: Product ownership and usage of beauty devices – ‘I have and have used it in the last 6 months’, by age, 2022

Figure 23: Repertoire of beauty devices owned and used in past six months, 2022

USAGE FREQUENCY

- **Majority of consumers use beauty devices on a weekly basis**
- **Young consumers are diligent with use of the eyecare devices while middle-aged women use massage devices frequently**

Figure 24: Usage frequency of beauty devices, 2022

Figure 25: Usage frequency of selected beauty devices, by age, 2022

FUNCTIONS OF SKINCARE PRODUCTS USED WITH BEAUTY DEVICES

- **Hydration and anti-ageing are adopted by consumers the most**

Figure 26: Functions of skincare products used with beauty devices, 2022

- **Consumers aged 25-29 focus on skin texture improvement**

Figure 27: Functions of skincare products used with beauty devices, by age, 2022

- **Repairing needs among tier 3 city consumers are strong**

Figure 28: Functions of skincare products used with beauty devices, by city tier, 2022

DESIRED FEATURE OF SKINCARE PRODUCTS USED WITH BEAUTY DEVICES

- **Consumers demand more prominent efficacy**

Figure 29: Desired feature of skincare products used with beauty devices, 2022

Figure 30: Complementary products of Illuminage Laser Device, China, 2022

- **Catering to the more specific needs for heavy users**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 31: Desired feature of skincare products used with beauty devices, by repertoire of used products, 2022

Figure 32: YOUNGMAY Space time skin booster, China, 2022

BARRIERS FOR MORE FREQUENT USE

- **Trouble to use remains the top barrier for more frequent use**

Figure 33: Barriers for more frequent use, 2022

- **Younger consumers are less patient**

Figure 34: Barriers for more frequent use, by age, 2022

- **Reasons for lapsed use vary by type of machine**

Figure 35: Barriers for more frequent use, by usage of devices, 2022

FEATURES TO DRIVE USAGE FREQUENCY

- **Consumers look for more body of proof and a helping hand to enhance the effect**

Figure 36: Features to drive usage frequency, 2022

- **Affluent consumers look to more professional help**

Figure 37: Features to drive usage frequency, by monthly personal income, 2022

- **Laser devices require more care afterwards**

Figure 38: Features to drive usage frequency, by types of device not used in past six months, 2022

BEAUTY PERSONAS

- **Who are they?**
- **Beauty Mavens show high enthusiasm in using beauty devices**

Figure 39: Repertoire of beauty devices used in past six months, by beauty persona, 2022

- **Enthusiastic Experimenters demand more repairing benefit with smoother usage of device**

Figure 40: Functions of skincare products used with beauty devices, by beauty persona, 2022

- **Beauty Mavens look to experts to convince them for more frequent use**

Figure 41: Features to drive usage frequency, by beauty persona, 2022

APPENDIX – METHODOLOGY AND ABBREVIATIONS

- **Methodology**
- **Abbreviations**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.