



Skincare Products in China: Characteristics of Male Consumers

As consumption levels in mainland China continue to rise and the country's international business ties develop, looks increasingly matter at work. In light of this, the growth potential of the mainland skincare and cosmetics products market should not be underestimated. In step with cultural changes, today more and more mainland men are using skincare products and paying attention to benefit-based product segmentation. According to Euromonitor International's estimates, retail sales in the mainland male skincare and cosmetics products market will grow at an average annual rate of 13.5% during 2016-2019, much higher than the global average of 5.8%, to top RMB1.9 billion in 2019.

In order to get a good understanding of the characteristics and development trends of China's skincare and cosmetics products market, HKTDC Research conducted a series of company visits, consumer focus group discussions and an online questionnaire survey between October and December 2015 (see Appendix for details). The survey constituted an in-depth study into the spending mentality, consumer preferences, purchase considerations and purchase channels of mainland consumers of skincare and cosmetics products. This article examines the spending mentality and preferences of mainland male consumers in buying skincare products.

Male Skincare Routine: Cleansing, Toning and Moisturising

This survey targeted two groups of male consumers, namely young (aged 20-30) and mature (aged 31-45). Overall, male consumers' daily skincare routines are relatively simple, with 63% of respondents using only cleansing milk, lotion or face cream. Only 37% have their own daily skincare routine (using toner and face mask, for example). The average respondent uses 3.4 different skincare products every day. However, it is interesting to note that the proportion of respondents in Harbin, in Heilongjiang province, who have their own skincare routine (60%) and the average number of skincare products used by them every day (4.6 different items) are both higher than the overall average.



Skincare Routines of Male Consumers in Different Cities

City	Have own skincare routine	Average no. of skincare products used every day	City	Have own skincare routine	Average no. of skincare products used every day
Overall	37%	3.4	Chongqing	<i>38%</i>	3.3
Beijing	<i>42%</i>	<i>3.5</i>	Xi'an	28%	3.2
Shanghai	32%	2.8	Harbin	<i>60%</i>	<i>4.6</i>
Guangzhou	24%	2.8	Hangzhou	30%	2.9
Chengdu	36%	3.2	Qingdao	36%	<i>3.5</i>
Shenyang	<i>42%</i>	<i>3.6</i>	Changzhou	<i>46%</i>	<i>3.9</i>
Wuhan	<i>42%</i>	3.2	Zhengzhou	<i>40%</i>	<i>3.5</i>
Nanjing	36%	<i>3.5</i>	Wuxi	36%	3.4
Changsha	32%	<i>3.5</i>	-	-	-

Note: Figures in red italics denote percentages that are higher than overall average
 Base: All male respondents (800)

The survey finds that the higher the monthly household income of the respondents, the proportion having their own skincare routine and the number of skincare products used are also higher than the overall average.

Skincare Routines of Male Consumers with Different Monthly Household Incomes

	Overall	Monthly Household Income				
		Below Rmb10,000	Rmb10,000-12,000	Rmb12,000-20,000	Rmb20,000-40,000	Over Rmb40,000
Only cleansing milk, lotion or face cream is used	63%	<i>76%</i>	<i>66%</i>	59%	54%	58%
Have own skincare routine	37%	24%	34%	<i>41%</i>	<i>46%</i>	<i>42%</i>
Average no. of skincare products used every day	3.4	2.7	3.1	<i>3.5</i>	<i>4.0</i>	<i>4.1</i>

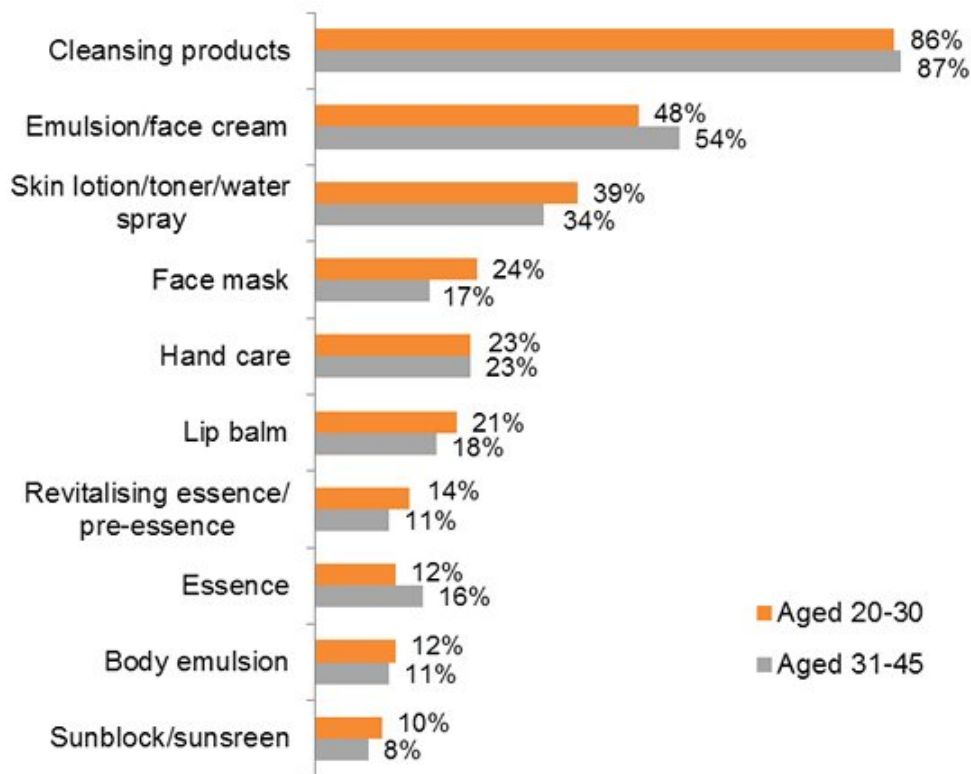
Note: Figures in red italics denote percentages that are higher than overall average
 Base: All male respondents (800)

According to male respondents participating in the focus group discussions, most do not like skincare routines involving multiple steps, while the types of skincare products they use in the morning and at night are more or less the same. The average number of skincare products used every day by young and mature respondents are 3.5 and 3.3 respectively. The majority of respondents only use cleansing milk, lotion or face cream for their daily skincare. As such, cleansing products (87%) and lotion/face cream (51%) are their most used skincare products, with toner (36%) ranking third. It is worth noting,



however, that some male respondents also use hand care products (23%) and revitalising essence (13%) every day. This shows that the demand among mainland men for skincare products has begun to move towards segmentation.

Everyday Skincare Products for Men

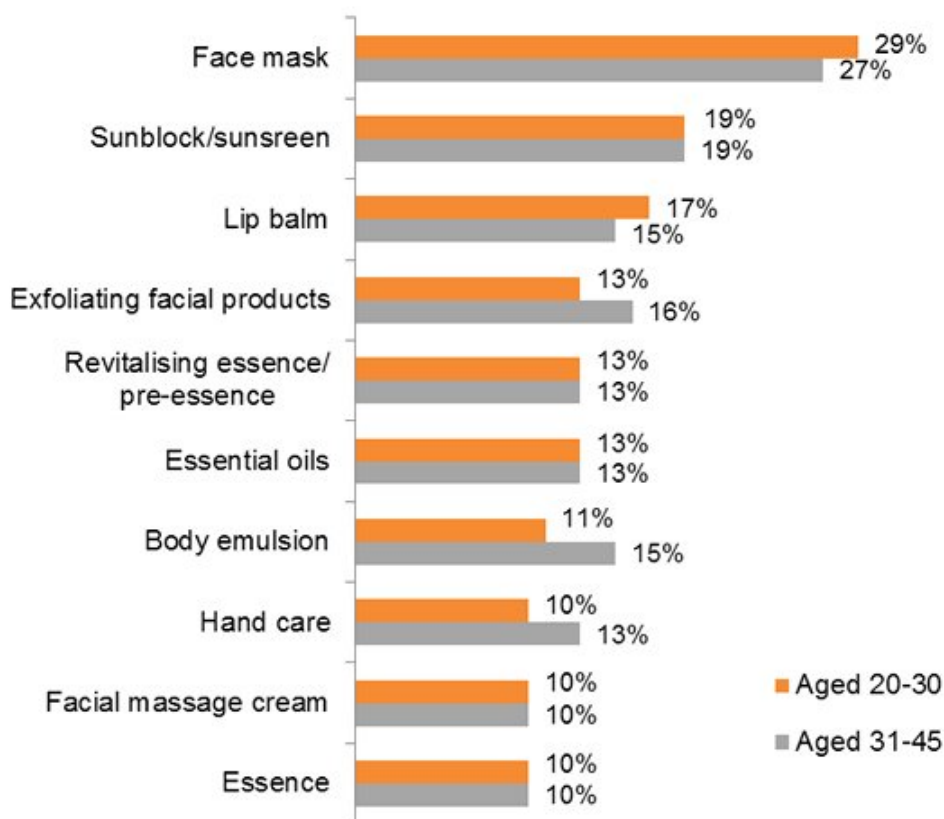


Note: Only the top 10 most mentioned products are included
 Base: All male respondents (800)

The survey finds that mainland male consumers have a growing awareness about skincare products and benefit-based product segmentation. Products respondents use regularly or on as-required basis include face mask (28%), sunscreen/sunblock (19%), and lip balm (16%). Moreover, skincare products which are more refined and targeted, such as peeling cleansers and facial massage creams, also have a mention rate of over 10%.



Male Skincare Products Used on As-Required Basis



Note: Only the top 10 most mentioned products are included
 Base: All male respondents (800)

Changing Aesthetic Ideals: Smooth Skin for Men

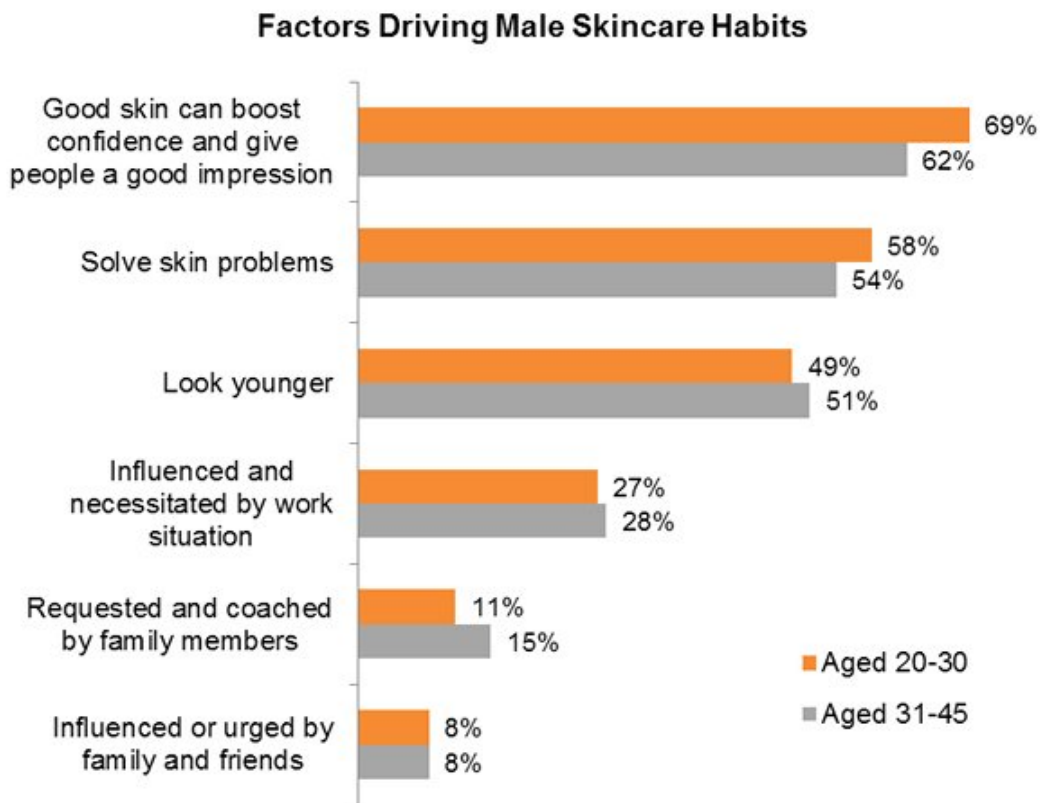
Male participants in the focus group discussions pointed out that in the past mainland men preferred macho facial features and paid hardly any attention to skincare. Today, however, under the influence of movie, TV and showbiz trends, in particular the well-groomed appearance of Korean actors, smooth skin has become more of a priority across the mainland. This has in turn prompted young men to adopt skincare habits (for more details, please see [Tapping China's Skincare and Cosmetics Market through Cross-Border E-Commerce](#)).

Younger respondents tend to have initiated their skincare routines earlier than the more mature respondents. From the focus group discussions it emerged that some young respondents started to use specialist face cleansing products while at senior high school, gradually moving on to using different kinds of skincare products to improve their skin condition after entering university or starting work. Comments included, "Today, air pollution is heavy and it affects the quality of skin", "[As I] often smoke, drink and stay up late, [I] find my skin has turned bad". Some male respondents said their girlfriend or wife encouraged them to use skincare products regularly. At the same time, the launch of male product ranges by foreign and mainland skincare brands in recent years has made it



much easier for mainland men to develop a skincare routine.

Overall, 27% of the male respondents said the reasons for them adopting a skincare routine were “influenced and necessitated by [their] work situation”. However, these proportions were higher in Wuhan (42%), Xi’an (40%) and Zhengzhou (40%), most likely because foreign economic relations and trade are now developing at a faster pace in inland cities, with the result that foreign culture has begun to influence these cities.

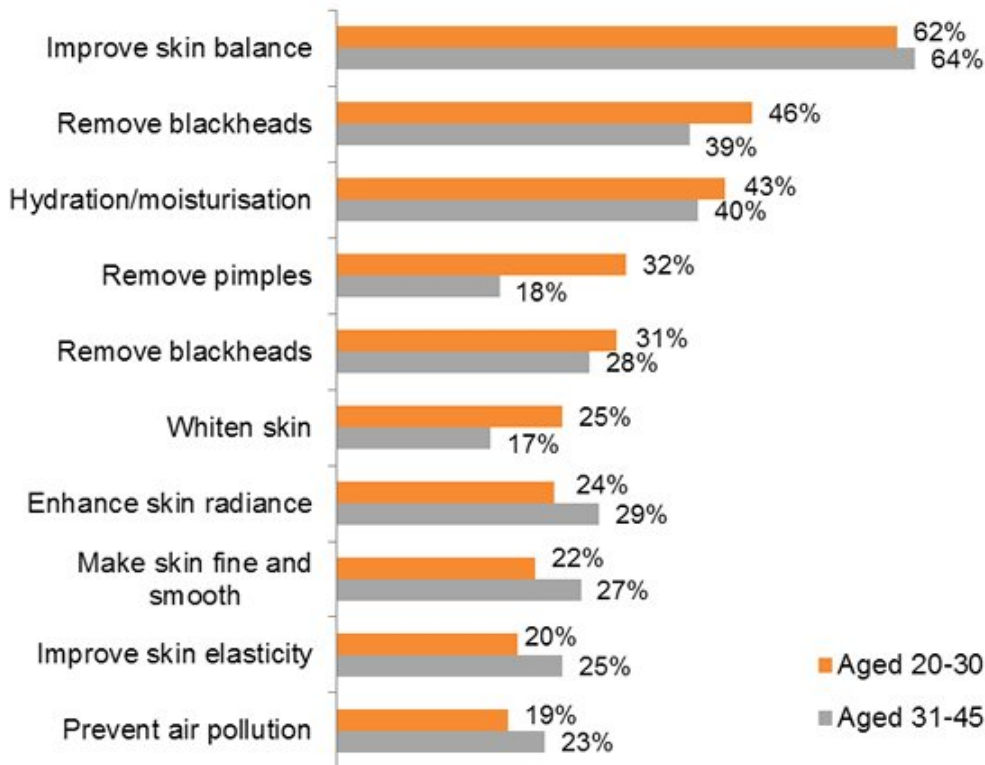


Base: All male respondents (800)

Men in different age groups have different expectations of the quality of their skin. Hence, the benefits they demand of skincare products also varies. Young respondents mainly take care of their skin in order to resolve skin problems, so they primarily look for products that can help get rid of blackheads, remove acne and whiten skin. On the other hand, maturer respondents tend to go for products that can give them clearer, smoother and firmer skin.



Expected Benefits of Male Skincare Products

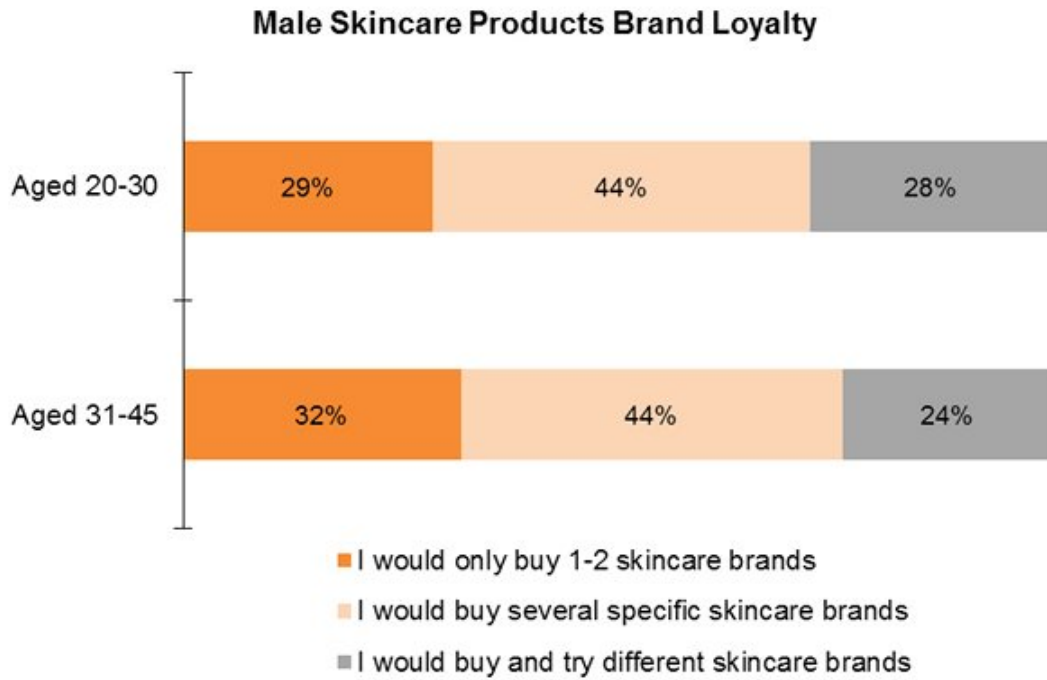


Note: Only the top 10 most mentioned products are included
 Base: All male respondents (800)

Skincare Sets In Demand

Overall, 45% of the male respondents prefer using skincare sets of the same brand mainly because they can use the whole set of products and follow the steps suggested by the brand. Some respondents (30%) would, on the basis of using skincare sets of a certain brand, add other products of the same brand. Only 25% of the respondents like to mix and match products of different brands and different sets. This is probably due to the fact that there is a limited choice of male skincare brands available on the mainland market, and because men do not like complex skincare procedures.

The survey also finds that 44% of the male respondents stick to a few specific brands when it comes to buying and using skincare products. Respondents participating in the focus group discussions indicate that they would not spend much time getting to know different skincare brands and only buy brands that they know well. However, other respondents admitted that when they encounter sales personnel who recommend new brands/products to them, they can be easily persuaded to make purchases. Based on this, we can observe that male skincare brand loyalty can be described as “passive”. Persuasive salespeople will likely succeed in inducing male consumers to try new skincare brands.



Base: All male respondents (800)

Male-Targeted Skincare Lines Attract Consumer Attention

Mainland men prefer to buy skincare brands they are familiar with. Therefore, when a new brand enters the mainland market, it must offer unique products before it can attract consumers to buy and try. Since currently not many male skincare brands are available on the mainland market, some male participants in the focus group discussions said that “When [I] see skincare ads saying that the product is specially designed for men, [I] would give it a try”. The survey shows that the factor that most attracts respondents to buy a new brand is “products meeting a specific skincare need” (59%), for example a range targeting only men, or specific skin types, or products such as anti-ageing or anti-wrinkle creams which offer specific benefits. Coming second is “new product ingredients” (45%), such as snail cream, horse oil or lanolin.



Considerations When Buying New Male Skincare Brands



Base: All male respondents (800)

Mainland and European Skincare Brands Most Popular

Skincare brands in the China market are becoming increasingly diversified. Apart from mainland brands, a great number of foreign brands have made their way onto the mainland market. Young and mature respondents both mostly purchase mainland and European skincare brands. In recent years, young people have been strongly influenced by Korean culture and trends, and as a result the proportion of young respondents (18%) buying mostly Korean skincare brands is higher than that for mature respondents (12%).



Origin of Most Purchased Male Skincare Brands

City	China	Europe	South Korea	Japan	US	Others
Overall	43%	21%	15%	12%	8%	1%
Beijing	<i>44%</i>	<i>22%</i>	10%	<i>16%</i>	8%	-
Shanghai	36%	<i>28%</i>	8%	10%	<i>16%</i>	<i>2%</i>
Guangzhou	28%	<i>24%</i>	<i>22%</i>	10%	<i>12%</i>	<i>4%</i>
Chengdu	<i>60%</i>	20%	6%	4%	8%	<i>2%</i>
Shenyang	<i>44%</i>	<i>24%</i>	<i>22%</i>	10%	-	-
Wuhan	40%	<i>22%</i>	14%	10%	<i>14%</i>	-
Nanjing	38%	<i>22%</i>	12%	12%	<i>14%</i>	<i>2%</i>
Changsha	40%	20%	12%	<i>22%</i>	4%	<i>2%</i>
Chongqing	42%	18%	<i>22%</i>	<i>14%</i>	2%	<i>2%</i>
Xi'an	<i>46%</i>	18%	<i>22%</i>	8%	4%	<i>2%</i>
Harbin	<i>48%</i>	16%	<i>16%</i>	12%	6%	<i>2%</i>
Hangzhou	<i>44%</i>	14%	<i>18%</i>	<i>14%</i>	8%	<i>2%</i>
Qingdao	<i>48%</i>	12%	<i>20%</i>	10%	<i>10%</i>	-
Changzhou	42%	<i>24%</i>	14%	<i>16%</i>	2%	<i>2%</i>
Zhengzhou	<i>48%</i>	14%	14%	12%	<i>10%</i>	<i>2%</i>
Wuxi	40%	<i>32%</i>	8%	8%	<i>12%</i>	-

Note: Figures in red italics denote percentages that are higher than overall average
 Base: All male respondents (800)

The price of imported skincare brands is higher than that of mainland brands. Inevitably, therefore, the purchasing power of consumers affects their choice to a certain extent. The proportion of respondents with a monthly household income of under RMB20,000 buying mainland skincare brands is higher, while the proportion of respondents with a monthly household income of over RMB20,000 buying foreign brands is also higher. In terms of price, the average prices paid by respondents with a monthly household income of less than RMB20,000 for toner and face cream are, respectively, RMB171 and RMB166 respectively. For those with a monthly household income of over RMB20,000, those figures are RMB334 and RMB339.



Origin of Most Purchased Male Skincare Brands

Origin of Brand	Overall	Monthly Household Income				
		Below Rmb10,000	Rmb10,000-12,000	Rmb12,000-20,000	Rmb20,000-40,000	Over Rmb40,000
China	43%	59%	50%	46%	26%	23%
Europe	21%	15%	18%	19%	30%	20%
South Korea	15%	12%	13%	14%	17%	23%
Japan	12%	8%	11%	11%	15%	15%
US	8%	6%	6%	7%	11%	18%
Others	2%	-	2%	3%	1%	1%

Note: Figures in red italics denote percentages that are higher than overall average
 Base: All male respondents (800)

According to interviews with mainland skincare and cosmetics products distributors (for details, please see [Tapping China's Skincare and Cosmetics Market through Cross-Border E-Commerce](#)), mainland consumers have formed certain impressions of skincare and cosmetics product brands from different countries or regions even if they have not actually used these products themselves. For instance, consumers generally have the perception that Swiss brands focus on medical cosmetology, that US brand products have more advanced formulae, and that Japanese brands specialise in whitening and are more suitable for the skin of Asians.

Quality and Word-of-Mouth Influence Purchase Decisions Most

Overall, male consumers' four main considerations when buying skincare products are: guaranteed quality/good word-of-mouth (65%), good value for money (55%), suitability for Asians (34%), and natural ingredients (34%). Among those respondents who mostly purchase mainland skincare brands, 72% said they believed those brands offered good value for money and, 40% said they were more suitable for Asians. Among respondents who mostly purchase European brands, meanwhile, 81% said their preferred brands offered guaranteed quality, while 34% identified advanced technology as a factor in their purchase decisions.



The Brand Origin Factor of Most Purchased Male Skincare Brands

Base: Respondents who mostly purchase brands from that country/region	Overall (n = 800)	Origin of Most Purchased Skincare Brands				
		China (n = 344)	Europe (n = 165)	South Korea (n = 120)	Japan (n = 94)	US (n = 65)
Guaranteed quality/ good word-of-mouth	65%	55%	81%	69%	70%	68%
Good value-for-money	55%	72%	36%	51%	44%	40%
Suitable for Asians	34%	40%	12%	48%	48%	8%
Natural ingredients	34%	33%	34%	40%	35%	26%
Advanced technology	22%	9%	34%	33%	29%	32%
Special formula/unique product	20%	12%	30%	31%	18%	17%
High grade	16%	8%	26%	22%	15%	26%
Choice of product grades and price points	14%	15%	9%	18%	14%	12%
Lots of promotional offers	9%	9%	11%	12%	3%	12%
Attractive packaging and design	6%	5%	7%	8%	7%	5%

Note: Figures in red italics denote percentages that are higher than overall average

Conclusions

The survey shows that the daily skincare routines of mainland men are relatively simple, with most using only cleansing milk, lotion or face cream. However, young males are beginning to pay attention to the specific benefits of skincare products and are likely to use such products as sunscreen/sunblock, face mask and lip balm which target specific areas or needs. Currently, not many male skincare brands are available on the mainland market. When a new brand enters the market, if it can offer products featuring specific formula for men and its sales personnel are persuasive enough, male consumers may be interested to buy. However, the most important considerations when buying skincare products are still product quality/word-of-mouth and value for money.

Appendix:



Focus Group Discussions:

City	Shanghai	Chengdu
Respondent Profile	Monthly household income: RMB20,000 or above	Monthly household income: RMB10,000 or above
	Monthly personal income: RMB10,000 or above	Monthly personal income: RMB5,000 or above
Sampling Distribution	Bought skincare or cosmetics products in last 3 months	
	Have daily skincare or makeup habits	
	4 groups in each city (a total of 8 groups):	
	Group 1: females aged 20-30	
	Group 2: females aged 31-45	
	Group 3: males aged 20-30	
	Group 4: males aged 31-45	

Online Questionnaire Survey:

City	Beijing, Shanghai, Guangzhou	Chengdu, Shenyang, Wuhan, Nanjing, Changsha, Chongqing, Xi'an, Harbin, Hangzhou, Qingdao	Changzhou, Zhengzhou, Wuxi
Respondent Profile	Minimum monthly household income: RMB12,000	Minimum monthly household income: RMB7,500	Minimum monthly household income: RMB6,500
	Bought skincare or cosmetics products in last 3 months		
Age Distribution	Have daily skincare or makeup habits		
	Sampling in each city:		
	Aged 20-30: 75 females and 25 males		
	Aged 31-45: 75 females and 25 males		
	Total 3,200 respondents: 2,400 females and 800 males		


Average Monthly Household Income of Male Respondents:

City	Average Monthly Household Income (Rmb)	City	Average Monthly Household Income (Rmb)
Overall	19,568	Chongqing	16,360
Beijing	26,500	Xi'an	15,520
Shanghai	26,740	Harbin	18,100
Guangzhou	30,180	Hangzhou	18,245
Chengdu	19,195	Qingdao	17,520
Shenyang	16,425	Changzhou	17,360
Wuhan	18,655	Zhengzhou	16,970
Nanjing	22,695	Wuxi	17,065
Changsha	15,560	-	-

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