

Pulse of China

June 2024

HEALTH SUPPLEMENTS AND BEAUTY DEVICES



REGULAR FEATURES

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

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

Brought to you by **Searchlight Management Consulting**

Data provided by **Xiaohongshu (小红书)**

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Health supplements and beauty devices

Health and beauty, while somewhat different concepts, are often related in the minds of consumers. For many Chinese consumers, health or wellness is often reflected in outward appearance. Clear, healthy skin, in particular, is often something that consumers seek to achieve through eating the right herbs, avoiding the wrong foods, the cultivation of healthy habits and sometimes through new treatments like oxygen therapy.

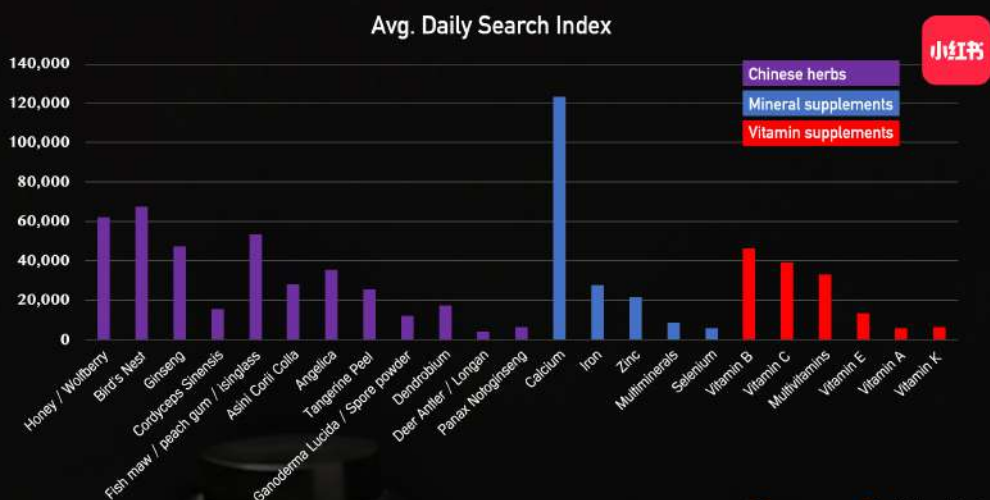
Health and beauty also sometimes have a common thread in that consumers are looking for long term, sustainable solutions for both rather than quick fixes. This can take the form of a daily ritual relating to exercise, supplements and also a beauty regimen with specific therapies that consumers believe will give them beautiful skin or other such benefits.

This month, we focus on two specific product categories that are related to health/wellness and beauty. We look at herbs and supplements – both from traditional Chinese medicine as well as Western pharmaceutical origins – to understand what consumers are looking for in the health arena. Additionally, we look at a very interesting beauty related category – home-use appliances that allow consumers to replicate some of the services normally found in beauty salons and beauty spas.



Health supplements

More searches for food-based / herbal medicine than vitamins or minerals, but calcium tops list



Source: Xiaogongshu search index for May 1-31, 2024

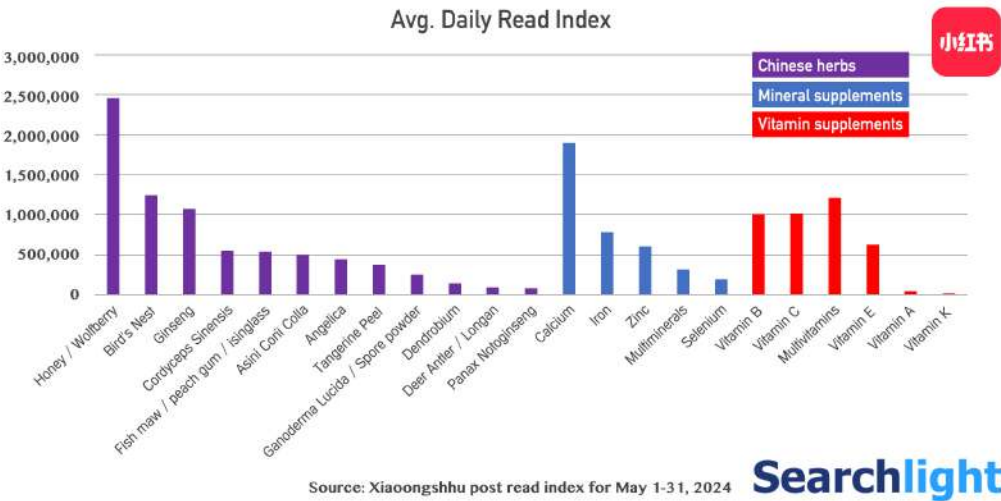
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1. Top searches and posts-read in this category relate mostly to Chinese herbs and extracts rather than vitamins or mineral supplements. However, calcium tops the list in terms of average search index over the month and is also the 2nd most read topic

Not surprisingly, there is more interest in Chinese herbs and supplements than in the more Western concept of specific vitamin and mineral supplementation. Calcium, however, stands out as one supplement that is much searched.

More sustained interest in reading posts around vitamin and mineral supplements, although top read posts are around honey /goji berries

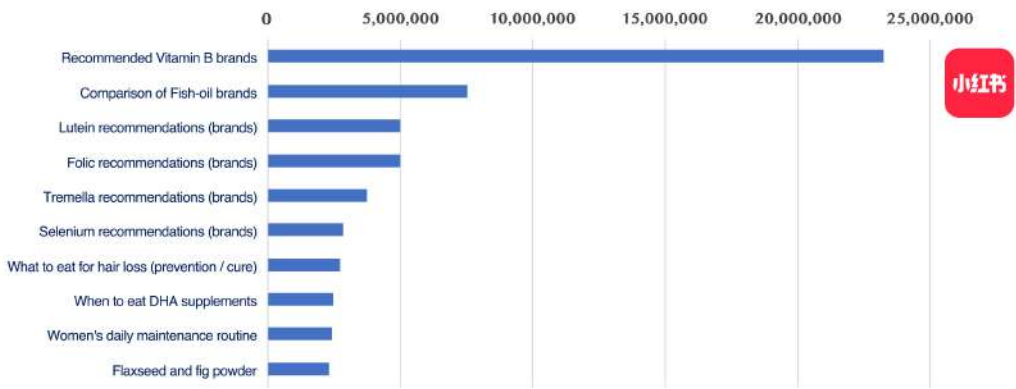


There is more consistent and sustained interest in content across the category, with calcium again popping up as a topic of great interest, although outdone on posts read by honey / wolfberry. (A lot of the names we've used here are what is available as an English translation but apart from well-known herbs such as ginseng and cordyceps sinensis, we understand not all of them may be familiar).

All of this suggests that brands in this space (and there are many), should focus on educating consumers and providing more information about how supplementation helps with long-term health rather than competing purely for salience in search terms.

2. A large proportion of the top read topics relate to comparisons between brands / versions of well known supplements – Vitamin B, Fish-Oil, Folic acid and so forth

Most read topics dominated by branded supplements, comparisons / evaluations of brands



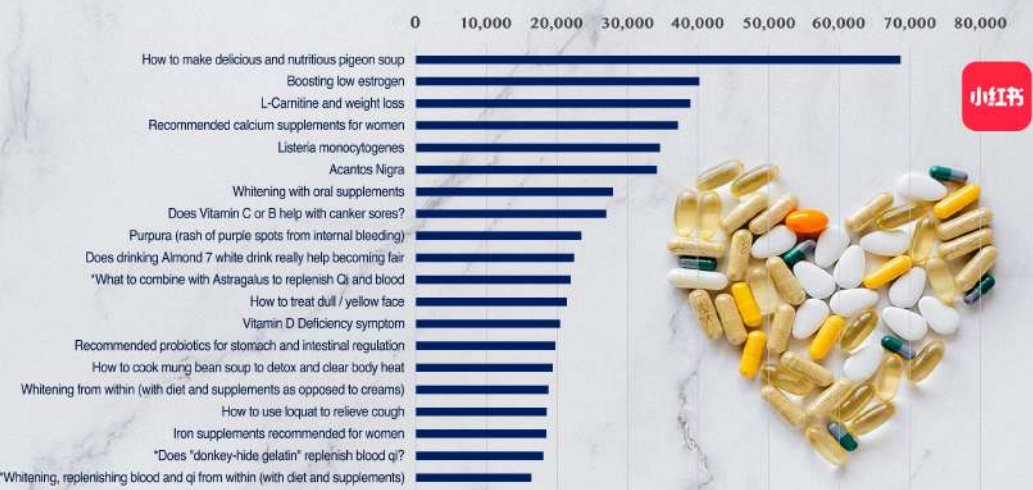
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Source: Xiaohongshu top health-maintenance related topics – by post viewing index from May 1 - 31, 2024

When consumers are looking to make brand choices they look online for studies and comparisons across different brands – which may be the place to focus on driving preference for a specific brand based on positive comparisons by third-party evaluators.

3. Searches tend to focus on very specific questions – often conditions where consumers are looking for a remedy – and are spread quite evenly across a long list of topics

Top 20 searched topics relate to specific conditions or remedies. Search numbers are low compared to other categories, but there is a long list of topics clustered close together in terms of numbers



Source: Xiaohongshu key phrase search Index May 1 - 31, 2024 Searchlight

This suggests that consumers are very problem-solution oriented and marketers in this category need to build a very strong link to the specific health enhancement / problem that they are addressing with each supplement. However, from our previous newsletters covering other categories, you'll also see much larger search numbers, often in the hundreds of thousands or millions. For this category, search numbers for any specific topic are much lower – typically in the tens of thousands, but the list extends beyond the top 20 with similar search index numbers.



Beauty Devices

Before we dive into any analysis here, let's first understand exactly what we mean by beauty devices.

Essentially, in China, consumers have access to relatively affordable devices that can replicate, at home, some of the more expensive ones in professional beauty salons. There is, therefore, a far greater likelihood of consumers in China buying these devices and taking care of some of their beauty related regimen on their own.

We've captured some of the more popular devices in this category in the image below just to give you an idea of the variety of devices and the functions they cover.



**LED Skin
Treatment Lamp**



**Photo Skin
Rejuvenator**



**RF Stimulator -
Collagen generation,
anti-wrinkle**



**Microcurrent facial-
stimulate skin, facelift**



Home mesotherapy



Oxygen injector for skin rejuvenation



Facial deep cleaner



Ultrasonic blackhead remover



Milk-light device - brighten, de-age skin



Laser hair remover



Facial steamer for cleaning pores



LED Skin-treatment mask

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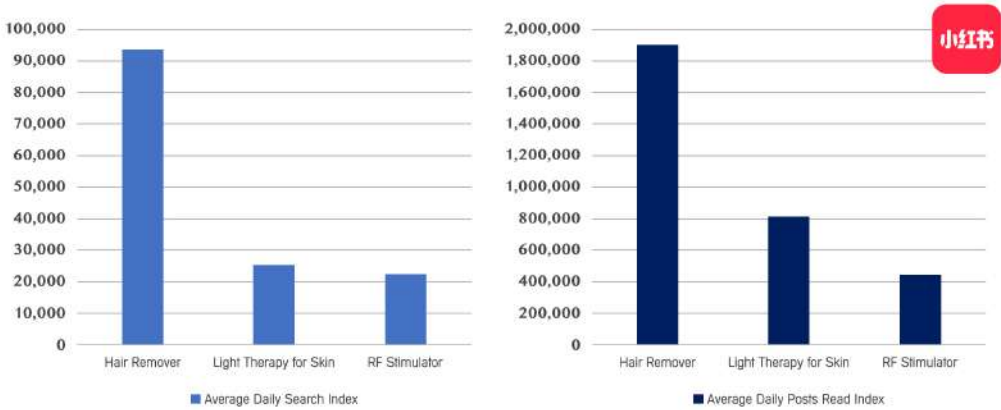


There are devices that help with tightening skin, devices that help with removing blackheads, hair-removal devices, devices that rejuvenate skin with oxygen therapy and also light therapy. Our data covered 14 different devices but for the purpose of this newsletter, we've just focused on a few that have significant search and post reading numbers.

1. Hair-removal and skin therapy RF (Radio-Frequency) are the top 3 types of devices both searched for and read about – although reading numbers are far greater than search numbers

While we looked at data for 14 different types of devices, search and read numbers dropped sharply after the top 3. Hair-removal and skin-therapy devices are clearly the main areas of interest for consumers as shown by both search and post-reading numbers. Most consumers are interested in just reading about the category, understanding what the devices do and so forth – purchase intent would be signaled by more proactive product searches where consumers than start to evaluate the pros and cons of different devices and brands.

Hair removers, light therapy and RF skin stimulators dominate searches and posts read

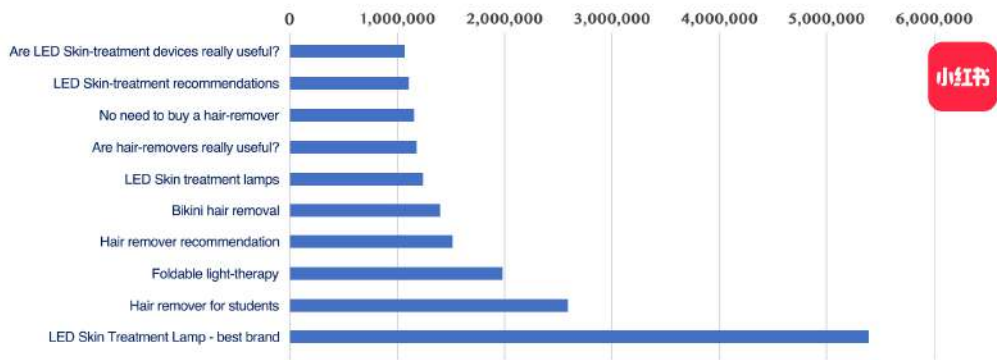


Source: Xiaohongshu keyword search and posts read Index May 1 to 31, 2024

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2. Most read topics are dominated by posts related to hair-removal and LED skin-treatment devices

Top posts read are all to do either with LED skin-treatment devices or hair removal – though the detailed content of the posts focuses on specific aspects or questions relating to these devices



Source: Xiaohongshu posts read Index May 1 to 31, 2024

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Interestingly, a lot of the posts appear to be evaluating the basic efficacy of devices – and then a large number focus on recommending specific brands or the best brand. All of this suggests that many consumers are still evaluating the relative merits of different devices that claim the same benefit, although LED skin-treatment lamps seem to have arrived at the stage where consumers are evaluating / asking for specific brand recommendations in order to make a purchase decision.

Summary

Chinese consumers approach long-term health and beauty quite differently than consumers anywhere else. Consumers in China are more likely to rely on TCM based herbal concoctions and natural ingredients, although a few key supplements like calcium appear to have captured significant consumer interest. Top topics in the health space are very specific, relating to specific health conditions or problems and solutions for these problems.



When it comes to beauty devices, hair-removal and skin-treatment top the list, with LED skin-treatment lamps being the device most searched and read about. Underlying the numbers in this section is the fundamental fact that consumers in China are very willing to buy devices that help replace a beauty salon regimen, allowing them to treat their beauty needs more frequently by owning a means of doing so.

Also, in both categories, devices / supplements are linked to very specific problems that the consumer is seeking solutions for – suggesting that brands in this space need to signal very clearly what problems or conditions they're addressing.

While in most categories the top 20 keywords / phrases or the top 10 post topics account for a large part of the total, in this category the numbers are more spread out. There is a long list of topics that people read or research, they tend to be very specific.

All of that suggests a very different consumer mindset. Consumers are looking for information with a specific product / problem focus, reading topics without necessarily searching for them purposefully, and very likely, not necessarily doing research with an intent for immediate purchase. Given that both the supplements and beauty devices are intended for long-term use and once purchased, will form part of a long-term regimen, that makes complete sense. Brands in this space need to focus on education, publishing data from third-party trials and evaluations and building a reputation for efficacy without side-effects.

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HOT TOPICS

of THE MONTH

Since we focused on consumers health-related behavior this month, the first table of hot topics continues on that theme – looking at the health related topics that garnered the most views. We've listed only the top four since viewing numbers tail off significantly after those.

Topic	Content Description	Views	Article Link
My health rituals	Everyone shares their own health secrets - from bedtime health rituals to office health secrets	5.2 billion	Article Link
Controlling sugar in your diet	Controlling blood sugar doesn't have to be hard. Share with everyone your eating and drinking tips for painless blood sugar control!	440 million	Article Link
What does long-term health mean?	What does it mean to be a healthy person? It's not that you don't have any minor problems, but that you are willing to approach health as a lifestyle, keep learning and keep taking positive actions	160 million	Article Link
Each of us has minor ailments	If you could eliminate one disease for women in the world, what would it be?	84 million	Article Link



As we do every month, we also looked at top topics without any filters on the areas of discussion to arrive at our generic hot topics of the month. These are quite varied, relating to the time of year in topics like summer travel, student graduation and so forth. However, topics like home management and pets seem to pop up every so often as perennial favorites.

Topic	Content Description	Views	Article Link
Shoot your own film	Record the vivid moment of Summer in films	1 billion	Article Link
Our family pet in a video	There is no need for complicated editing and filters, nor for excessive dubbing and text. Record the most vivid moments and the most sincere emotions in your pet's daily life	790 million	Article Link
My Graduation Vlog	It's the end of my university years. Time to record my graduation with a vlog	160 million	Article Link
Home manager	Looking for the best Home manager who manages their home well. Your home represents your unique lifestyle and the result of your efforts.	120 million	Article Link
Filming every moment of your holiday travel	Come and share your travel vlog with us	94 million	Article Link



the platform, the users, and the consumers

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

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

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

<https://www.xiaohongshu.com>

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ABOUT
XIAOHONGSHU



ABOUT US

Searchlight

Set up in early 2020, Searchlight is a boutique management consulting firm headquartered in Shanghai.

Our typical scope of work covers:

- a. Market and consumer analysis to identify opportunities
- b. Defining business strategy and business model to leverage these opportunities
- c. Brand architecture, proposition and positioning to deliver the strategy

Our team of 14 associates covers a wide range of specialist areas – marketing, advertising, media, content marketing, brand management, HR, CRM, sales management, technology, and business management. Each of us has at least 20 years of work experience, a large part of that in China.

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

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

www.searchlightchina.com

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

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