

DISRUPTING THE FUTURE

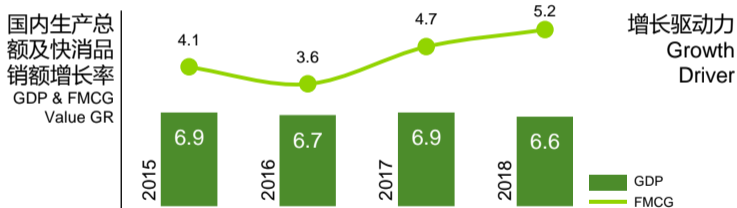
颠覆未来：市场变革下的品牌增长模式

Disruptive Growth Formula in China Beauty Market

凯度消费者指数

中国快消市场加速，个人护理大放异彩

China FMCG market accelerates driven by premiumization; Personal Care outperforms.



品类销额增长率
Category Value GR



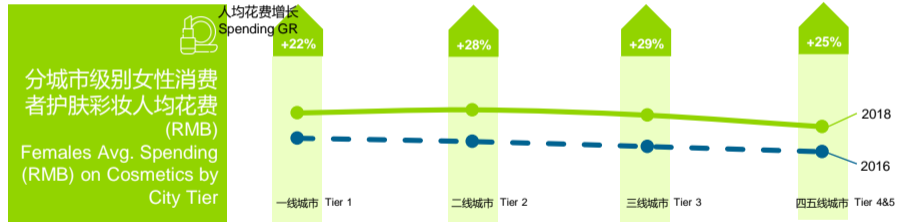
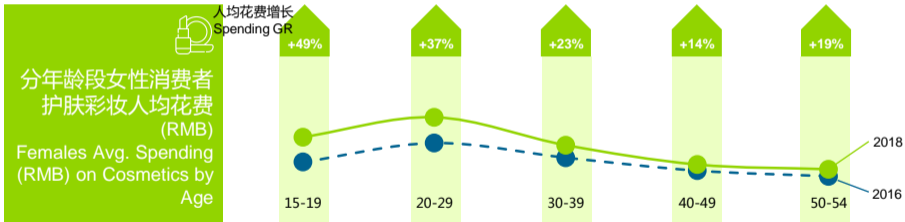
护肤彩妆独领风骚，潜力巨大

Facial Skin Care and Makeup keeps strong growth with massive potentials.



20代女性是化妆品消费主力，下线增长迅猛

20s females are the key group in cosmetics market; lower tiers show prospective growth driven by the young.



聚焦日新月异的消费模式

Looking into a growingly complicated China market

聚焦日新月异的消费模式

Looking into a growingly complicated China market



随时购买的习惯

Always-on
Shopping



逐步高阶的行为

Increasing
Sophistication



乐于尝新的态度

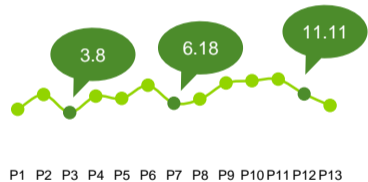
Loving
to Try

化妆品消费成为日常习惯，社交平台助力时刻种草拔草、并渗透小镇青年

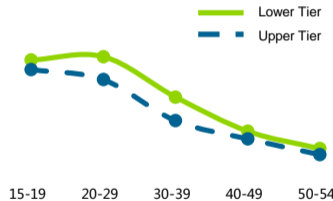
Consumers start to purchase all year round; social EC triggers shopping and breaks the barrier for low tiers.



分时间段线上消费人次增长率
Online Shopping Traffic GR by Period

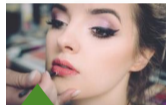


分年龄微信购物渗透率
WeChat Shopping Penetration by Age



消费者美妆知识不断积累，渴望更专业的护理和更高阶产品

Consumers' knowledge accumulates; they pursue more professional treatment and advanced products.



逐步高阶的行为
Increasing Sophistication

43%

的20代女性喜欢阅读最新的美妆信息
Of females love to read latest beauty news



基础研究



言安堂

+22%

女性去美容院/SPA的人数增长
Number of females went to beauty salon/spa



渗透率上涨品类
Category of High Penetration Incremental



精华
Essence



防晒
Sun Care



眼部护理
Eye Care



卸妆水
Makeup Remover



唇膏
Lip Stick



妆前乳
Primer



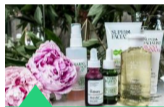
眼影
Eye Shadow



粉底液
Liquid Foundation

品牌选择愈加多样，多品牌叠加购买成为常态

Consumers are adding more brands into basket; shopping across brand nationalities and price tiers are usual.



乐于尝新的态度
Loving to Try

2018年消费者触及品牌个数
Number of brands having reached consumers in 2018



护肤
Skincare

▲ +20% vs.2016



彩妆
Makeup

▲ +22% vs.2016

平均购买品牌数
Avg. # of cosmetics brands purchased



多品牌叠加购买
Brand mix

>60%

女性跨品牌国籍购买
Women buying from 2 or more brand nationalities

>70%

女性跨价格带购买
Women buying from 2 or more price tiers

升级“降级”同时进行

Upgrading and “downgrading” at the same time



高端品牌渗透率增长
Luxury Brands Penetration

▲ +20% vs.2017



大众品牌平均花费增长
Mass Brands Avg. Spending

▲ +10% vs.2017

挑战和机遇并存的市场为不同的品牌提供增长机会

Challenges and opportunities co-exist for both emerging and big brands

新兴品牌爆发式增长
Emerging brands booming

ATREUS®

PERFECT DIARY
PRÉLÈVE

ISDIN
LOVE YOUR SKIN

elta
MD
SKINCARE

CHIOTURE
稚任泉®

LEGEND AGE

Annabella

Mageline
MAG. PARIS

HomeFacial Pro
Beauty Creates

BYPHASSE

大品牌坚守阵地
Big brands keep strong

ESTÉE LAUDER

clé de peau
BEAUTÉ

LA MER
海蓝之谜

CLARINS

ANESSA

LANCÔME
PARIS

SK-II

SHISEIDO
GINZA TOKYO

fi

解码颠覆式增长

Decoding Disruptive Growth

随时购买的习惯
Always-on shopping



多触点、多时机
触及人群

Trigger consumers
everywhere using
multiple touchpoints

逐步高阶的行为
Increasing sophistication



乐于尝新的态度
Loving to try



电商助力快速崛起的品牌扎根成长，并为传统品牌打开下线市场

EC facilitate growth of emerging brands and unleash lower-tier market for big brands.

薇诺娜
线上销额占比
WINONA online
value share%

>50%

WINONA
薇诺娜

线上销额增长
Online Value GR

+50%



整体销额增长
Brand Value GR

+45%

线上
多平台策略

天猫 Tmall.com

JD. 京东

唯品会
vip.com

兰蔻线上线下
销额增长
LANCÔME online
& offline
value GR

均
Both >20%

LANCÔME
PARIS

下线城市销额增长
Lower Tiers Value GR

+47%



全国销额增长
TTL China Value GR

+36%

81%

的下线城市
新消费者来自线上
of lower-tier **New**
brand buyers
recruited **online**

随时购买的习惯
Always-on shopping



多地点、多时机
触及人群

Trigger consumers
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逐步高阶的行为
Increasing sophistication



运用步骤和场景
激发需求

Drive needs
in sophisticated routine and
usage occasions

乐于尝新的态度
Loving to try



丰富使用场景，填补碎片化时机

Enrich usage occasions and fill up the blank in fragmental moments.

现代都市生活
Urban lifestyle

早晨时间宝贵

晨间面膜
Morning Mask



晨间60秒
サボリーノ
Saborino
懒人面膜

上班族 学生党 起床困难户

长时间带妆在外

面部定妆喷雾
Facial Makeup
Setting Mist



妆前使用

·妆前打底，妆后定妆保湿

·持久锁妆，水润持久

·妆后使用

·妆后保湿，水润持久

·妆后保湿，水润持久

·妆后保湿，水润持久

·妆后保湿，水润持久

·妆后保湿，水润持久

·妆后保湿，水润持久

·妆后保湿，水润持久

·妆后保湿，水润持久

全天任意时间使用

·妆前打底，妆后定妆保湿

·持久锁妆，水润持久

·妆后使用

·妆后保湿，水润持久

·妆后保湿，水润持久

·妆后保湿，水润持久

·妆后保湿，水润持久

·妆后保湿，水润持久

·妆后保湿，水润持久

·妆后保湿，水润持久

·妆后保湿，水润持久

熬夜加班



熬夜必备精华



告别蓝光损伤

场景定制
Occasion
customization

重要场合前

社交场合容光焕发
Perfect skin condition in social
occasions



婚纱面膜
"Wedding Dress"
Mask

旅途中

出差旅行便于携带
Easy to carry in trips



7日旅行套装
7-day Trip Set

不同妆容

妆容浓淡不同清洁力度
Different products for different
makeup



卸妆乳/水/
油
Removal in
different formats

随时购买的习惯
Always-on shopping



多地点、多时机
触及人群

Trigger consumers
everywhere using
multiple touchpoints

逐步高阶的行为
Increasing sophistication



运用步骤和场景
激发需求

Drive needs
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独特的产品优势和品
牌定位
传递价值

Deliver value
with unique product benefit
and brand positioning

有效成分沟通、专业形象打造独一无二性

Incorporate scientifically-convincing ingredients and forge unique brand image

有效成分沟通
Ingredient
communication



品牌人设打造 - Brand Characteristics



颠覆性增长 =

持续创新和差异化定位，
最大化品牌价值

捕捉市场趋势，提供独特的产品优势和品牌形象应对消费者日益成熟的美妆使用行为和场景

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渠道融合，打造联通线上线下一致的品牌体验

通过互动内容和线下交流，扩大品牌的跨渠道、多触点销售机会

中国速度