

Background

Objective: Based on Douyin skincare video content of LRL and competitors, to pinpoint areas for optimization and craft strategic recommendations accordingly.

Scope:

- Skincare category: Essence, Cream, Toner&Lotion, Skincare Bum, UV-Protection
- Data Source:
 - PGC: Douyin Video by KOL & Brand Official Accounts
- **Data Period:** 202310-202409
- **Analysis:**
 - Skincare Category Overview - Competitive Landscape
 - Brand Engagement Trend & Content Analysis
 - LRL Skincare
 - PROYA
 - KANS

TOPLINE SUMMARY (1/2)



Key Product



PGC KPI

SOI	15%	Top 3
SOE	15%	Top 2
CPE	NA	NA

Content

- Brand content is quite official & traditional, most brand campaign & spokesperson content
- Brand campaign #我值得拥有 got positive feedback from fans
- Fewer CTA & conversion content
- More category/products are promoted

KOL

- KOL NO. 958
- Fewer KOL NO., though high ROI
- Top KOL: Beauty KOL & Sitcom-funny/campus KOL (小剧场, one piece)



Key Product



PGC KPI

SOI	25%	Top 1
SOE	24%	Top 1
CPE	1.0	👍

Content

- Utilize celebrity clips vividly by BGC, to drive conversion
- Branded short sitcom and micro-film to build brand image successfully
- TA-based content, offering solution for pinpoints, high authenticity

KOL

- KOL NO. 2809
- Spend aggressively on diverse KOLs
- Top KOL: Gossip/Entertain & Life-Pet KOL



Key Product



PGC KPI

SOI	16%	Top2
SOE	15%	Top2
CPE	1.2	/

Content

- BGC is diverse, with more life-oriented and casual celebrity content clips for seeding & conversion
- Effectively utilized Big V sales, such as贾乃亮, to boost conversions

KOL

- KOL NO. 1144
- Promote BOM product heavily;
- Top KOL: Life-Food, Sitcom KOL
- (short drama, series)

TOPLINE SUMMARY (2/2)

Product Strategy

Findings:

- A flagship product for each category garners high engagement; for instance, KANS' Red Ruby and LRL's LHP
- A single 'bom' can invigorate multiple product categories, as seen with PROYA's trio of toner, lotion, and essence



Suggestions for Product Strategy:

- Offer a flexible 'bom' product package that extends beyond just toner&lotion
- Consider a comprehensive 'bom' featuring all of LRL's top skincare products



Content Strategy

Findings:

- Content that is life-oriented and features casual celebrity moments is well-received
- CTA-focused and conversion-driven content is essential for boosting sales
- Sitcoms and humorous content continue to captivate audiences



Suggestions for Content strategy:

- ✓ Maximize conversion by employing celebrities as KOLs and expanding their influence
- ✓ Create engaging entertainment content that incorporates trending emotional elements from Douyin, such as humor, funny and everyday life scenarios

KOL Strategy

Findings:

- Capitalizing on DY ##新农人, leverage Life-Food&Family KOL is an effective strategy
- To capture the attention of the younger generation, KOLs of Gossip&Entertainment, ACG-Pet, and campus niches should be utilized



Suggestions for influencer strategy:

- ✓ Expand engagement with life KOLs to resonate with the mass audience on Douyin, as well as beauty comprehensive KOLs with skincare users
- ✓ Diversify KOL investments to tap into new fan bases, e.g. pets, food, etc.

Category Landscape



SKINCARE CATEGORY SOE, SOI AND CPE ON DOUYIN

PROYA is top one brand in terms of SOE & SOI from 2023, KANS has risen rapidly, gaining a significant share and reaching parity with LRL.

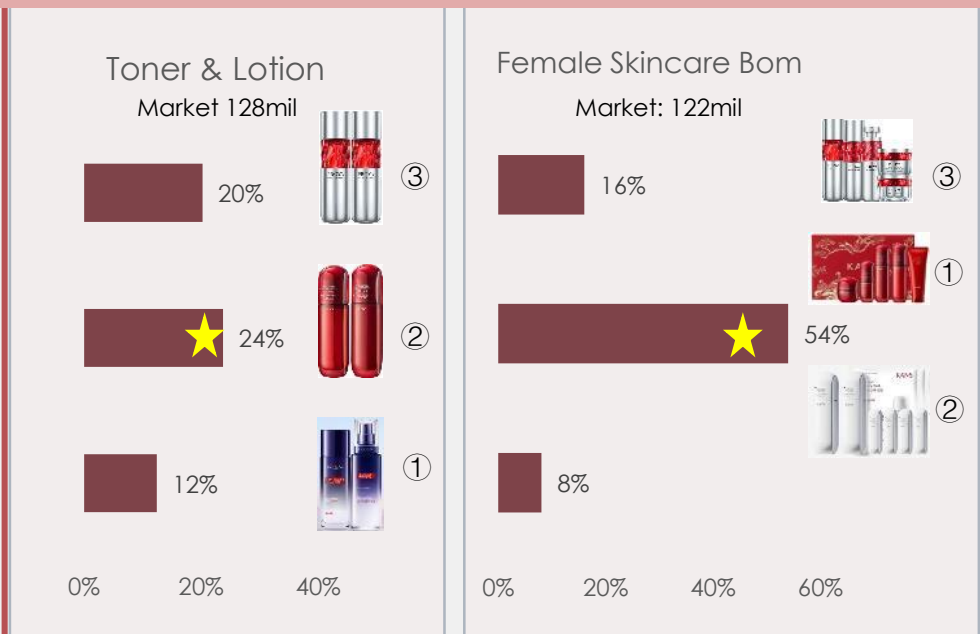
	Y2022						Y2023						Y2024 H1					
	Spendi ng (mil)	Engage ment (mil)	Impress ion (mil)	SOI	SOE	CPE	Spendi ng (mil)	Engage ment (mil)	Impress ion (mil)	SOI	SOE	CPE	Spendi ng (mil)	Engage ment (mil)	Impress ion (mil)	SOI	SOE	CPE
PROYA	60	34	477	8%	8%	1.8	122	121	3,075	<u>19%</u>	<u>20%</u>	1.0	103	100	3,784	<u>25%</u>	<u>24%</u>	1.0
KANS	14	8	112	2%	2%	1.6	80	64	2,968	18%	11%	1.2	74	61	2,407	16%	15%	1.2
LRL Skincare		100		<u>24%</u>	<u>24%</u>	0.0		106	2,222	14%	18%	-		60	2,240	15%	15%	-
Others	/																	
Market		423	5,690	100%	100%			598	16,279	100%	100%			408	15,231	100%	100%	

Data source: Douyin
Data period: 2022.01-2024.10
This statistics is covering all Skincare data

CATEGORY LANDSCAPE

THE BRAND'S ENGAGEMENT ON DOUYIN SHOWED DISTINCTLY DIFFERENT CATEGORY STRATEGIES

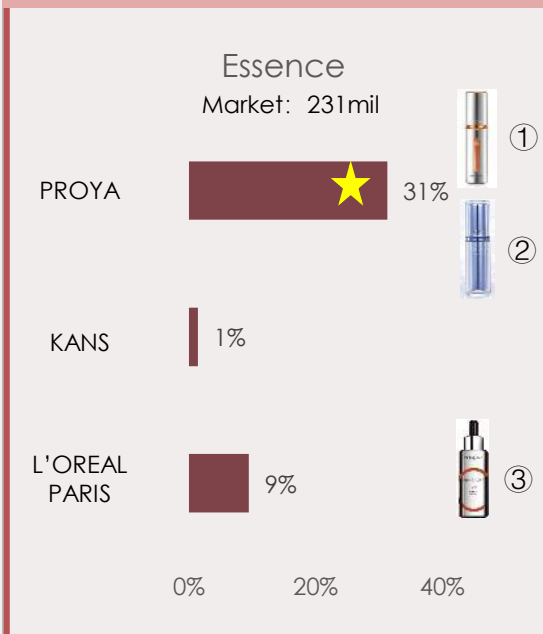
As an upgraded version of the Toner & Lotion set, the Skincare Bom has become a hit category for local brands.



Intense competition exists in the Toner & Lotion category, with each brand having its core flagship products.

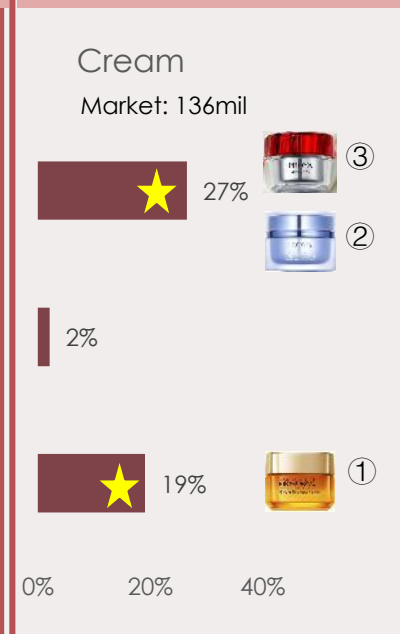
KANS is adept at promoting series products and has achieved significant returns. L'Oréal seems not engaged enough in this category.

PROYA is occupying a leading position in this category.



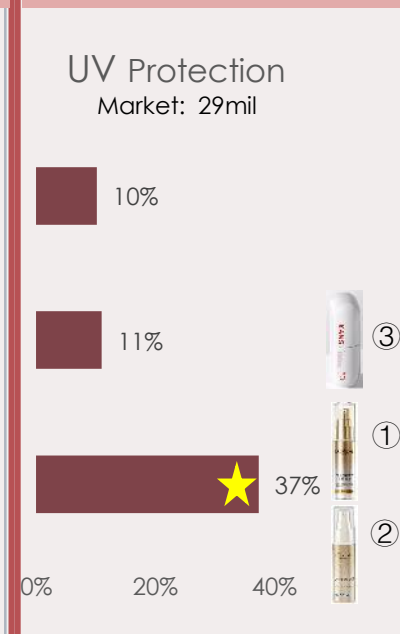
PROYA vigorously promotes its iconic Dual Anti-Aging Essence 双抗/源力, while L'Oréal mainly recommends the new VC essence 真C瓶.

LRL LHP in top one engaging cream.



L'Oréal 小蜜罐 is top engaging cream, but PROYA got more engagement from multiple products.

LRL is strong in UV category



L'Oréal is leading in UV category by top products 小金管 & 小银管. Followed by KANS, which promoted its 白蛮腰 UV cream intensely

Brand Engagement Trend & Content Analysis

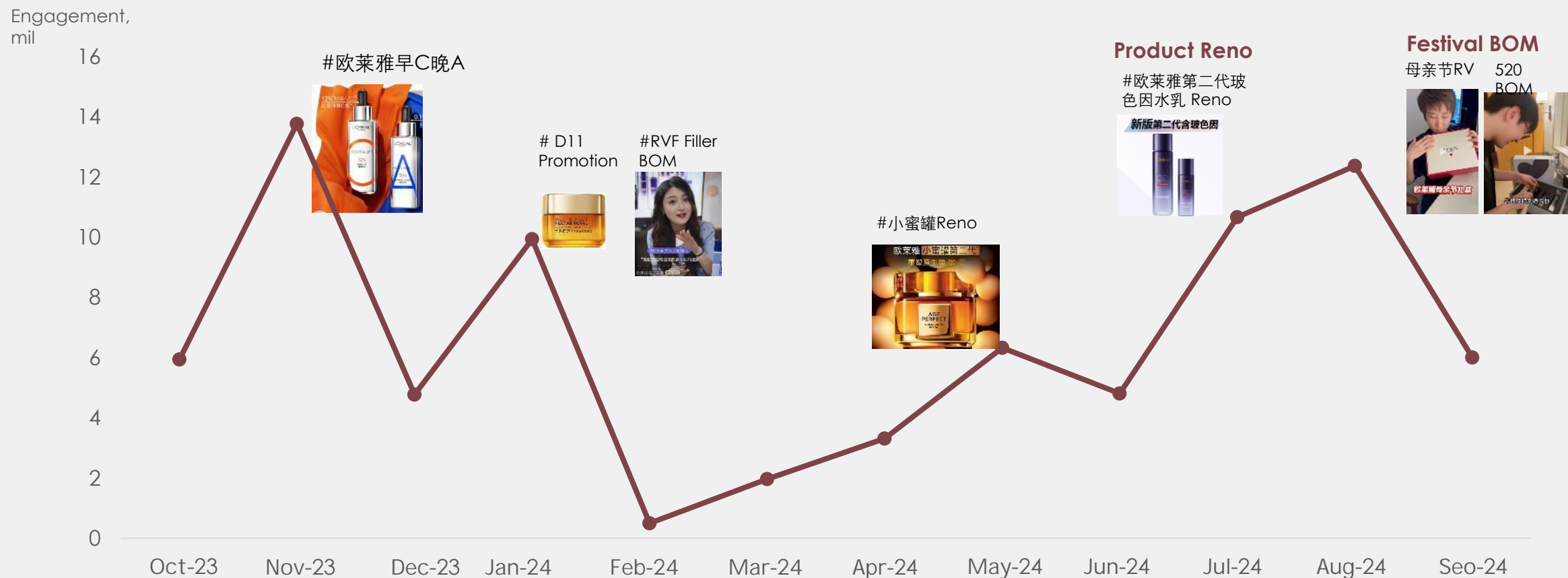
L'ORÉAL
PARIS
巴黎欧莱雅



THE PROMOTIONAL IS INTENSIFIED IN LINE WITH NEW PRODUCT LAUNCHES/RENO, EC PROMOTION & SPECIAL FESTIVAL

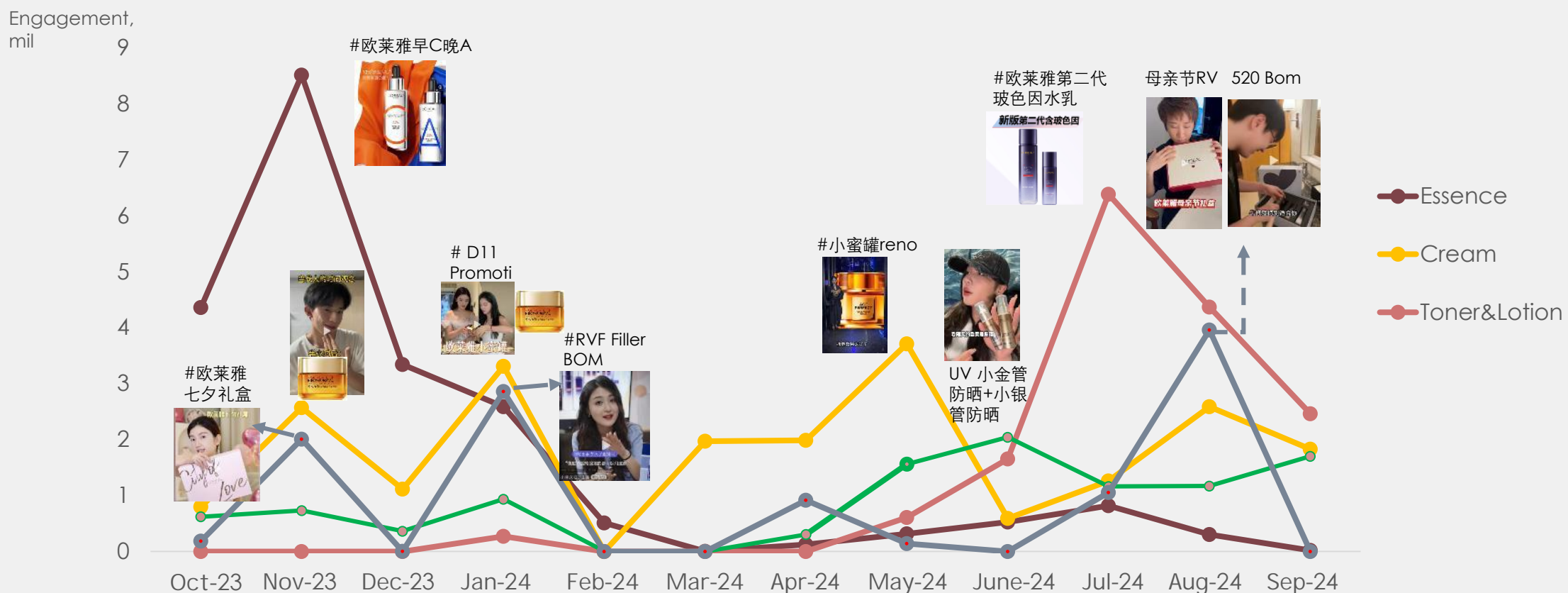


LRL Skincare Engagement Trend, 202310-202409



LRL SKINCARE APPEARS TO HAVE A MORE BALANCED INVESTMENT ACROSS ITS SUBCATEGORIES

LRL Skincare Engagement Trend By Category, 202310-202407



ALTHOUGH THE OVERALL INVESTMENT IS RELATIVELY WEAK, LRL SKINCARE OPERATES WITH HIGH EFFICIENCY IN MOST TYPES OF KOLS; PARTICULARLY SITCOM-FUNNY AND CAMPUS

	LRL		PROYA		KANS	
	KOL Post NO.	Eng. per post	KOL Post NO.	Eng. per post	KOL Post NO.	Eng. per post
TTL	958	83,924	2,809	51,783	1,144	87,108
Beauty-Comprehensive	186	49,241	218	26,584	117	19,447
Seeding-Beauty Product Recommendation	169	39,363	312	12,687	104	17,164
Life-VLOG	102	99,626	495	52,229	134	47,442
Seeding-Daily Product Recommendation	78	43,455	174	16,574	80	11,620
Beauty-Skincare	72	55,395	56	12,295	9	14,558
Sitcom-Couples	67	127,802	184	106,440	314	156,505
Sitcom-Funny	59	306,156	180	99,406	58	217,354
Beauty-Makeup	50	47,876	101	34,406	20	25,827
Fashion-Appearance	37	67,730	127	60,698	28	31,804
Sitcom-Family	32	130,882	274	67,478	89	89,236
Others	32	87,408	214	62,388	51	84,959
Life-Parents & Children	21	77,174	99	35,868	38	45,701
Sitcom-Workplace	12	120,247	17	117,806	8	85,517
Sitcom-Campus	10	348,654	21	128,639	8	152,586
Fashion-Outfit	7	8,463	55	25,978	9	7,663
Life-Food	6	123,995	105	66,493	21	284,431
Gossip&Entertainment	4	43,382	12	109,510	3	9,867
Others						

LRL SUCCESSFULLY LEVERAGED SITCOM FUNNY KOLS' TIME-TRAVEL THEMED SERIES,
TRIGGERED MORE ENGAGEMENT THAN SITCOM COUPLE KOLS' DRAMA

L'ORÉAL
PARIS
巴黎欧莱雅

Short drama by Sitcom-Funny KOLs:
Trigger more engagement with product placement, good at big exposure.

👍

合集·《穿越之先婚后宠》
刘大悦er
170mil views, EP1-5
#欧莱雅第二代玻色因水乳
@EP2,3,4
Average Eng: 737k



合集·我与顾少的百亿婚约
派小轩
500mil view, EP1-9
#欧莱雅第二代玻色因水乳
@EP5,6,8;
Average Eng: 993k



合集·恋曲1980
派小轩
300mil view, EP1-7
#欧莱雅第二代玻色因水乳
@EP6,EP7;
Average Eng: 774k



Short dram by Sitcom-couple KOLs:
Fewer engagement, more education details between couple interactions;

KOL Sitcom Couple	Short Drama	Total Views	EP NO.	Average Eng
乔七月	谎言之后	111mil	4	282k
糖一	玻动心弦	35mil	6	272k
浩杰来了	短剧·离婚律师	35mil	5	163k
乔七月	短剧·滚蛋吧前夫哥	63mil	5	133k
魔女月野	短剧·逆旅	95mil	11	109k
加菲鹵z	重生后，我平等地创飞每个人	13mil	5	70k

乔七月 - 谎言之后 浩杰来了 - 离婚律师 糖一 - 玻动心弦



CAMPUS KOLS THAT ATTRACT STUDENT DEMOGRAPHICS HAVE ALSO BEEN SUCCESSFULLY LEVERAGED, ESPECIALLY IN THE PROMOTION OF UV

Sitcom by Sitcom-campus KOLs:

The sitcom, which mirrors real-life college experiences and provides perceptive insights into university life, has garnered significant popularity on Douyin, especially resonating with and engaging a substantial student audience.

小熊的奇思妙想

#内容过于真实
#真实还原 #宿舍日常#小熊的奇思妙想#小金管+小银管
Views: 18.9 mil, Eng: 1mil



小扇

菌子引发的闹剧#内容过于真实
#反转剧情 #大学生哪有不疯的 #女王你好痞#欧莱雅小金管防晒
Views: 1.1 mil, Eng: 132k



Sitcom series by Sitcom-campus KOLs:

Sitcoms crafted with humorous memes from Douyin are highly amusing.(e.g. Chinese people pretending to speak Korean.)

叮叮喵dxy

#韩剧 #剧情 这么抽象的商战剧情 应该是第一次吧#欧莱雅第二代玻色因水乳
Views: 14.8 mil, EP1-3
Average Eng: 206 k



CONTENT CRAFTED FOR THE TARGET AUDIENCE, COUPLED WITH THE INFLUENCE OF KOLS, CAN SIGNIFICANTLY BOOST ENGAGEMENT LEVELS

- TA: Ingredient enthusiasts
- Content: instrumental analysis
- Sub-category: Essence



李嗲Lydiaaa

科学“算命”#DNA测序 #情侣 #欧莱雅双A瓶

Views: 22 mil, Eng: 1.3m



- TA: Girls who love taking photos
- Content: photo taking in Weihai
- Sub-category: Cream



小雪

没白来 真的没白来!!! 好美#欧莱雅小蜜罐第二代

Views: 29 mil, Eng: 1.3m



- TA: Couples
- Content: couple's interaction
- Sub-category: 520 skincare Bom



冬冬和37

第一次拍撕拉胶片! 感觉手一抖 200就没了 #520 礼盒

Views: 15 mil, Eng: 519k



BRAND OFFICIAL ACCOUNT ON DOUYIN: MOST OFFICIAL CONTENT ARE PRODUCT INTRO AND CELEBRITY ENDORSEMENT, WHILE FANS HAVE REPLIED THEIR LOVE AND SUGGESTIONS

Brand Campaign #我值得拥有
Subject: 是辨手，也是律师，詹青云
#巴黎欧莱雅 #我值得拥有
Eng: 26k



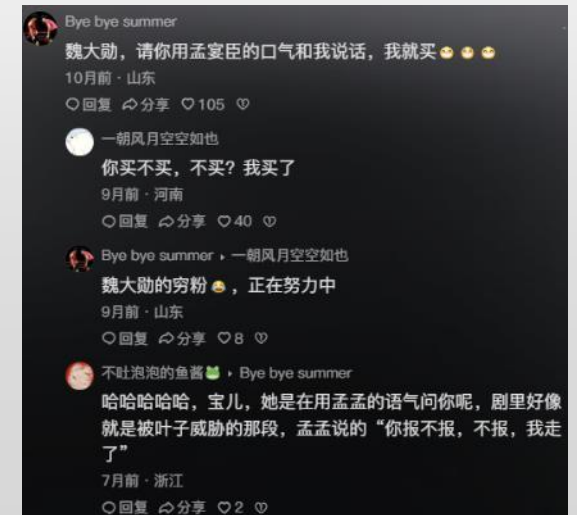
Fans have expressed their fondness for this series #我值得拥有, stating that it has given women an empowering core.



Celebrity Endorsement
Education video by 魏大勋,
promoting #欧莱雅第二代玻色因水乳
Eng: 7.5k



Fans expected he speaks and behaves just like his explosively popular character 孟宴臣.



LRL SKINCARE ON DOUYIN

BOTH BGC AND PGC IS MISSING ENOUGH CALL TO ACTION AND CONVERSION

CONTENT, HEAVILY ON BRANDING AND SEEDING



PGC-KOL

Awareness			Consideration (seeding)			Conversion			
Hero	Entertainment /trend	Information	Endorsement	Testimonial	Education	Benefit	Before / After	Crash Test	Sales
	FUNNY			Seeding		BENEFIT / USP			

Brand Account

HERO	INFO	Endorsement	Education	Benefit	Benefit	Conversion