

BGC OVERVIEW

From the official account posts, Essential is the most active brand, but Yolu and &honey achieve relatively higher engagement. Many brands, despite their limited number of posts, tend to focus on content related to celebrity collaborations.

Brand	Buzz	SOV	Engagement	SOE
Essential	781	61%	232,687	27.1%
Yolu	286	22%	297,657	34.7%
&honey	110	9%	318,765	37.1%
+tmr	47	4%	765	0.1%
Pantene	47	4%	856	0.1%
Wella	11	1%	973	0.1%
L'Oréal Paris	2	0%	6,790	0.8%
Total	1,284	-	858,493	-

Data period: 2023.10-2024.9

SOV=Brand Buzz/ Total Buzz

SOE=Brand Engagement/ Total Engagement

Total = monitored 7 brands in total

BGC= Brand Official Account

C1 - Internal use



PGC STRATEGY – PERFORMANCE OVERVIEW

- Among the analyzed brands, **Essential leads significantly** in buzz and engagement in the Japanese hair care and coloring market, with its **Share of Engagement (SOE) exceeding 50%**.
- Platform-wise, **L'Oréal Paris** shows the **best average engagement on Instagram and TikTok**.
- In terms of platform strategy, **most** brands focus on **Instagram**, with a few beginning to **experiment on TikTok**, while **YouTube** is gradually **declining** in importance in terms of KOL collaborating.

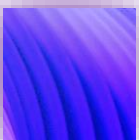
Brand	Instagram			TikTok			YouTube			Brand Total			
	Buzz	Engagement	Avg. Eng.	Buzz	Engagement	Avg. Eng.	Buzz	Engagement	Avg. Eng.	Buzz	Engagement	Avg. Eng.	SOE
Essential	564	579,228	1,027	44	705,874	16,043	7	56,187	8,027	615	1,341,289	2,181	55%
L'Oréal Paris	221	304,093	1,376	5	91,893	18,379	7	7,532	1,076	233	403,518	1,732	16%
+ tmr	109	65,997	605	23	222,321	9,666	-	-	-	132	288,318	2,184	12%
&honey	316	154,857	490	11	107,007	9,728	1	1,808	1,808	328	263,672	804	11%
Yolu	264	77,586	294	2	7,107	3,554	9	11,397	1,266	275	96,090	349	4%
Pantene	152	20,359	134	5	17,605	3,521	4	241	60	161	38,205	237	2%
Wella	292	19,001	65	1	9	9	3	1,083	361	296	20,093	68	1%
Total	1,918	1,221,121	637	91	1,151,816	12,657	32	78,248	2,445	2,040	2,451,185	1,201	100%

Data period: 2023.10-2024.9

SOE=Brand Engagement/ Total Engagement

Total = monitored 7 brands in total

C1 - Internal use



PGC STRATEGY – KOL TYPE

- From a KOL type strategy perspective, most brands collaborate with beauty, lifestyle, and hair-focused influencers. However, the effectiveness of these collaborations **varies** due to several factors, and overall engagement levels are not particularly outstanding.
- Among niche types, excluding the influence of public figures like singers and models, the "**girl next door**" type has collaborated with two brands and achieved good engagement. This persona and video content are closely associated with "**cuteness**," aligning well with the general perception of **Japanese aesthetic** culture.

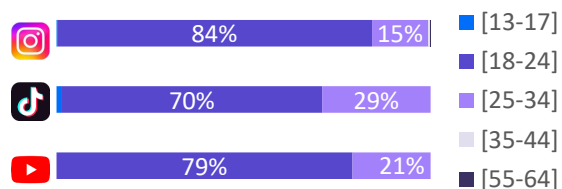
KOL Type	Essential		&honey		Wella		Yolu		L'Oréal Paris		Pantene		Plus Tomorrow		Total		
	Buzz	Avg. Eng.	Buzz	Avg. Eng.	Buzz	Avg. Eng.	Buzz	Avg. Eng.	Buzz	Avg. Eng.	Buzz	Avg. Eng.	Buzz	Avg. Eng.	Buzz	Engagement	Avg. Eng.
Makeup	315	765	157	683	18	85	108	409	56	454	61	141	29	565	744	444,461	597
Product Promoter	129	1,001	61	450	43	32	35	491	31	1,905	53	139	32	2,683	384	327,359	852
Hair	9	176	25	478	180	59	5	403	70	75	9	277	3	575	301	35,648	118
Vlog	48	384	32	20	16	110	35	307	21	243	13	588	29	2,747	194	123,974	639
Fashion	21	774	9	220	22	43	53	138	25	8,347	3	3,396	11	1,339	144	260,101	1,806
Skincare	24	156	15	97	2	459	6	305	4	51	8	69	8	2,082	67	25,349	378
Food	6	42	10	655	6	230	1	0	4	66	10	127	-	-	37	9,714	263
Public Figure	8	19,521	3	31,539	4	169	6	629	2	4,297	-	-	-	-	23	263,833	11,471
Mom & Kids	4	278	3	9	2	151	7	182	4	249	-	-	2	109	22	3,930	179
Travel	2	1	3	370	-	-	3	22	-	-	1	0	2	629	11	2,433	221
Bodycare	4	26	-	-	-	-	1	43	1	11	-	-	3	31	9	250	28
Girl Next Door	4	39,743	-	-	-	-	-	-	3	11,465	-	-	1	39,843	8	233,210	29,151
Singer	3	23,739	-	-	-	-	-	-	2	18,458	-	-	3	1,202	8	111,737	13,967
Gen Z Trendsetter	8	30,471	-	-	-	-	-	-	-	-	-	-	-	-	8	243,771	30,471
Actor/Actress	3	22,351	-	-	-	-	1	2,523	2	5	-	-	1	20,488	7	90,074	12,868
Beauty Beacon	4	8,061	-	-	-	-	1	3,996	1	2	-	-	-	-	6	36,242	6,040
Pets	1	0	-	-	3	192	-	-	-	-	1	0	-	-	5	575	115
Model	4	22,684	-	-	-	-	-	-	-	-	-	-	-	-	4	90,736	22,684
Photographer		-	-	-	-	-	3	17	-	-	-	-	-	-	3	51	17
Other	18	6,081	10	1,064	0	-	10	106	7	2,665	2	54	8	977	55	147,737	2,686
Total	615	2,181	328	804	296	68	275	349	233	1,732	161	237	132	2,184	2,040	2,451,185	1,201



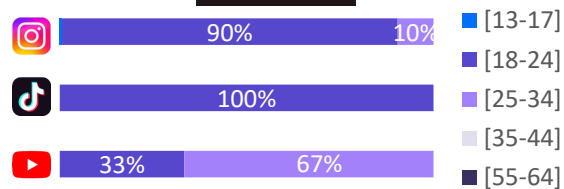
PGC STRATEGY –TA AGE GROUP

- Although the age distribution varies slightly across different platforms for each brand, most brands target young consumers aged 18-24 as their primary audience, followed by working professionals aged 25-34, with the two groups accounting for approximately 85% and 15%, respectively.
- Some brands, such as Wella on TikTok and &honey on YouTube, exclusively targeted the 25-34 age group, but the overall results were not satisfactory.

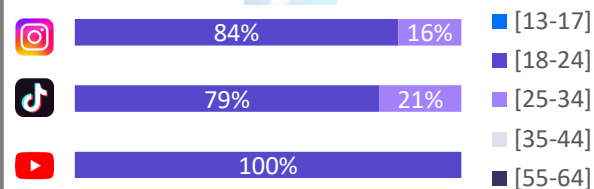
Total



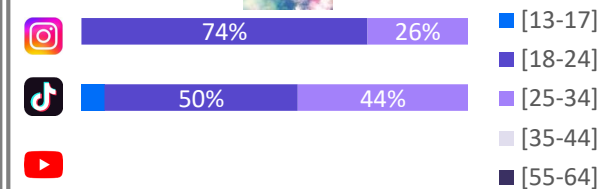
- ✓ primarily target : young student groups aged 18-24
- ✓ the secondary target group: working professionals aged 25-34



- ✓ Instagram and TikTok: primary the 18-24 age group
- ✓ YouTube: the 25-34 age group

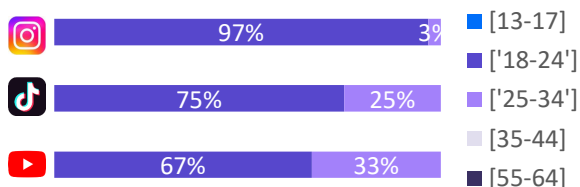


- ✓ Instagram and TikTok: primary the 18-24 age group, with a small portion from the 25-34 age group,
- ✓ YouTube: entirely aged 18-24.

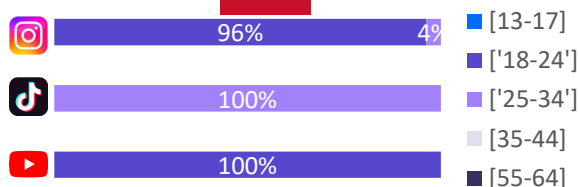


- ✓ Instagram: primary the 18-24 age group, with a small portion from the 25-34 age group
- ✓ TikTok: a more diverse age distribution

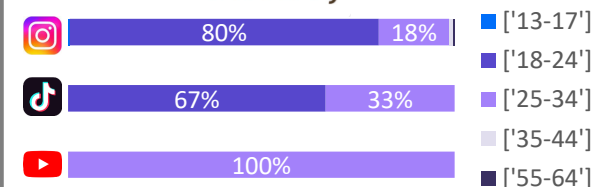
PANTENE



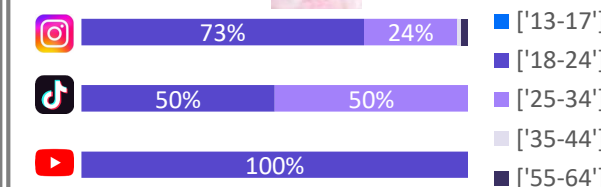
- ✓ All platforms: primary the 18-24 age group, with a small portion from the 25-34 age group



- ✓ Instagram and Youtube: primary the 18-24 age group
- ✓ Tiktok: entirely aged 25-34



- ✓ Instagram and TikTok: primary the 18-24 age group, with a small portion from the 25-34 age group,
- ✓ YouTube: entirely aged 25-34



- ✓ Instagram and TikTok: primary the 18-24 age group, with a small portion from the 25-34 age group,
- ✓ YouTube: entirely aged 18-24



PGC STRATEGY – PLATFORM CONTENT

- On Instagram, most brands use **straightforward recommendation** methods to promote their products. Among them, L'Oréal Paris stood out by collaborating with **models**, and Essential effectively used influencers' **beautiful selfies** as the cover image to attract fans engagement. Other brands, however, showed relatively average engagement.



Brand KOL Content Strategy on Instagram

L'ORÉAL
PARIS



- Celebrity** (model) Collaboration
- Showcasing the hair care process
- Straightforward Product Seeding

Essential



- Using **selfies** as cover image
- Focusing on **aesthetics**
- Straightforward Product Seeding



- Celebrity** collaboration
- Straightforward Product Seeding
- Showcasing the hair care process

PANTENE



- Showcasing the hair care process
- Straightforward Product Seeding
- Focusing on product **ingredient and function**



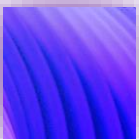
- Straightforward Product Seeding
- Showcasing hair coloring process
- Post about attending **events**



- Straightforward Product Seeding
- Showcasing hair care process



- Showcasing hair care process
- Product seeding
- Vlog**
- Emphasis on **night hair care**



PGC STRATEGY – PLATFORM CONTENT

- Although no brand is currently investing heavily on TikTok and most are still in the **testing phase**, some brands have already achieved good results. These are usually driven by **eye-catching content and dramatic presentations**. In contrast, regular recommendation content tends to struggle to generate high engagement.



Brand KOL Content Strategy on TikTok



- Showcasing the hair care process
- Product Seeding
- lacks attention-grabbing elements**



- Diverse content type
- School romance sitcom**
- Exaggerated styles created with hair spray**
- Showcasing the hair care process



- More diverse content
- Vlog, sitcom, seeding**
- Showcasing the hair care process
- Focusing on **ingredients**

PANTENE



- Showcasing the hair care process
- Product Seeding
- Similar to Instagram
- lacks attention-grabbing elements**



- Not a primary focus of Wella
- Showcasing the hair coloring process
- Product Seeding



- Showcasing the hair care process
- Promote **new package**



- Not a primary focus of YOLU
- Showcasing the hair care process



PGC STRATEGY – PLATFORM CONTENT

- The majority of analyzed brands are showing a **trend of reduced investment** on YouTube, with a generally low volume of influencer collaborations. Content on this platform tends to feature **longer videos with more detailed introductions**. Highly engaging content often has a "**professional/ expert**" characteristic, such as explaining ingredients to followers, providing recommendations for different situations, and demonstrating how to pair and use products from a series.



Brand KOL Content Strategy on YouTube



- Longer & detailed introduction and seeding
- Showcasing the hair care process



- Detailed explanation of popular series with **comparisons and differentiated recommendations**.
- Focusing on explaining the **ingredients**

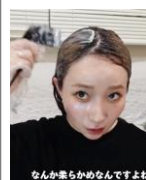


- No PGC from +tmr

PANTENE



- "**Hair Care for Your 50s**"
- Hair care on rainy day
- Showcasing the hair care process



- Expert interview** of introducing **gray coverage** hair dyeing tailored for individuals **aged 40+**
- Showcasing the hair care process



- Not the primary focus of &honey
- Implementing the product during the hair care process



- Not the primary focus of YOLU
- VLOG & Showcasing the hair care process