



男士美妆

MALE BEAUTY REPORT

男士美妆为何成为品牌在中国市场的
下一个掘金点

AIR PARIS

NEW YORK PARIS SHANGHAI



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AIR PARIS 总裁 Dimitri Katsachnias 先生在 2011 年接受《环球企业家》杂志采访时曾表示，“巴黎男人花了大约 50 年的时间从使用古龙水到接受使用须后水，而在中国这种变化可能只需要一年”。

尽管这一预测极具先见之明，但男士美妆的热潮还是远远超出了我们的预想。在中国，须后水不是重点，中国男士更偏好面膜、精华和高端防晒产品。作为新一代的美妆购买者，他们也追随着韩国的趋势，接受使用 BB 霜或是唇膏等彩妆产品。无论是销量还是消费者行为，中国都在推动着价值 1220 亿美元的全球男士美妆市场的发展。

据欧睿信息咨询公司的数据显示，中国男士美妆市场的增速是全球平均水平的两倍以上（13.5% vs 5.8%）。在竞争激烈的美妆市场中，男士作为消费者的出现为品牌带来了诱人的增长机会，更吸引了精明的企业家，希望通过专注于男士美妆的本土数字化品牌来占领市场。从香奈儿这样的全球巨头到马丁这样的本土公司，中国男士对美妆的需求水涨船高。

在我们看来，中国男士对于美妆需求的觉醒是我们从事美妆业 20 多年以来所遇到的最重要的宏观趋势之一。

因此，我们编写了这份深入的报告，希望能帮助相关人士更加清晰透视地理解这一趋势。

编写报告就意味着我们需要去查阅数据，观察文化，领会创意。借此，我们关注了消费者行为和品牌策略，其复杂程度远远超出了我们最初的假设。这份报告还展现出由于男士消费者的出现，在很大程度上重新定义了传统品牌创意、产品创新和品牌体验设计的行业手册。

我们希望这份报告能给予您灵感与创造力，将男士美妆的潜力转化为品牌的有形增长。

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简介

“男士彩妆套装销售额增长 401%。”这条醒目的文案位于天猫最新广告的中前部，作为 618 购物节前夕对于平台的宣传。

比起数字，更引人注目的是广告的色调和组成。广告并没有选择精致的模特，而是展示了一个长相普通的男士以一种最日常而平凡的方式使用化妆品。

在惊人的销量背后，这种创意想要表达的趋势是男士美妆和护肤已经不再是小众市场的专属。它已走向大众，也因此为品牌的增长释放出了巨大商机。从诸如马丁之类的植根大众市场的本土数字化品牌，到香奈儿这样的美妆奢侈品玩家，男士美妆潮流潜力巨大。

A screenshot of a Tmall advertisement for men's makeup. The top part shows a man and a woman applying makeup to each other in a bathroom. The Tmall logo is in the top left corner. Below the image, there is a red banner with the text "生活 各自理想" and "天猫 618 理想生活狂欢季 即将开幕". To the right, there is a white box with the text "男士彩妆套装销售额增长401%*" and a shopping cart icon. The bottom part of the advertisement is a solid red background with white text and icons.

天猫 618 购物节男士美妆广告。来源：天猫

男士美妆的崛起 为品牌在各个细分市场 创造了商机

新品牌的崛起

男士植物精华补水保湿面膜

15分钟快速补水



来源：淘宝

作为天猫和京东最畅销的品牌之一，马丁代表着一种新型的数字原生品牌，专注于打造男士美妆的高性价比

现有品牌的创新



来源：淘宝

LAB 系列正与职业电竞团队合作，拓展营销策略，以转化新一代的男士美妆消费者

奢侈品品牌的扩张



来源：Chanel.com

凭借“Boy de Chanel”男士美妆线，香奈儿成为首批在男性市场上大量下注的奢侈品牌之一

男士美妆

已经不再是小众市场的专属， 它已走向大众

我们认为，男士美妆将是未来几年最激动人心的增长点之一。市场呈现出的是由亟待释放的消费能力、强大的文化基础和相对开放的竞争环境所组成的激烈格局。它为既有品牌和新玩家都提供了巨大商机，能有机会跻身一线，塑造消费者行为并在行为固化之前在市场立足。

这个市场最吸引人的就是其不确定性：哪些美妆将完全成为主流？有多少男士会从护肤转向美妆？哪些品牌会领先一步？消费者会青睐哪些购买渠道？他们喜欢

什么样的代言人和品牌大使？会出现哪些新的产品款式和成分？有哪些女性市场中的最佳案例可以在多大程度上转化用于男性市场？等等...

想要回答这些问题，就意味着我们要去综合考虑文化，产品，品牌和渠道创新这些方面。在这份报告中，我们正是考虑到了上述因素，展现出了美妆是如何适用于不断发展变得更加广泛的男性气概文化，如何解析新的男士美妆常规流程，绘制出针对不同消费者类型的男士美妆路线。



新一代的中国男士

推动男士美妆护肤市场

崛起的燃料

高增长的故事总是建立在强大的文化基础上。

社会规范准则和公众想法的重大转变

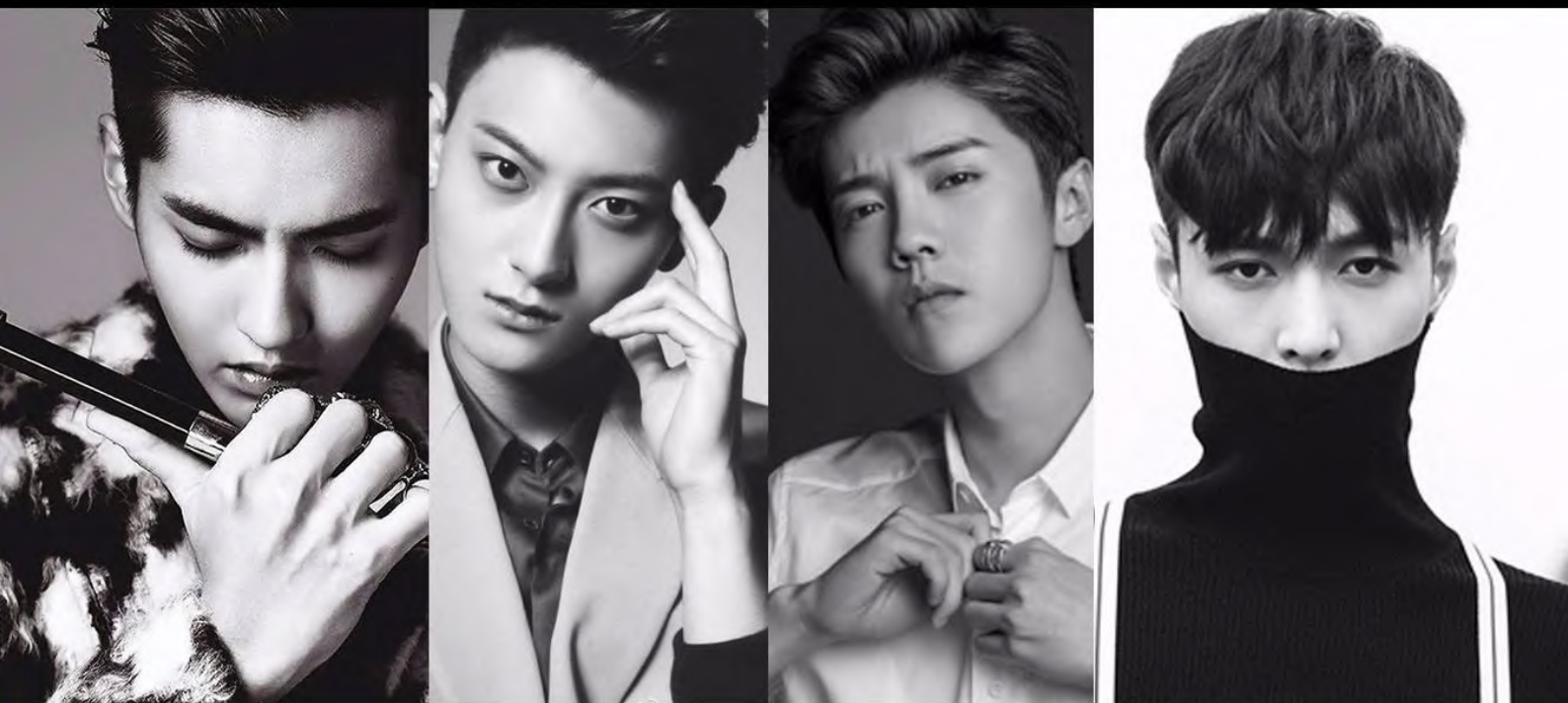
带来了新的行为和消费方式。

随着男性气质被重新定义，

新的生活方式习惯正逐渐成为主流，

塑造出“新一代的中国男士”。

“小鲜肉”：吴亦凡，黄子韬，鹿晗，张艺兴。来源：btime.com



解析新一代中国男士

传统意义上的男子气概



吴秀波，来源：Pinterest.com

- 被传统性别角色所塑造出的文化环境
- 地位来自经济上的成功
- 男人通过努力工作获得成功
- 消费参与度低
- 理想的男性外表：优雅、强大、成熟
- 男性化妆被认为是不正常的现象

新一代的男子气概



邓伦，来源：Pinterest.com

- 被性别重新定义所塑造出的文化环境
- 地位也来自个性和文化
- 男人也可以通过外表和个性获得成功
- 消费参与度高
- 理想的男性外表：温和、干净、年轻
- 男性化妆已经被完全接受，并且与男子气概并不冲突

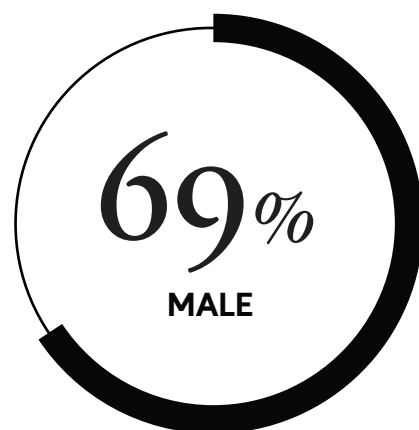
01.

完善自我的热情

如今的中国男士热衷于完善自我。他们将越来越多的空闲时间和可支配收入用于完善身心。自我完善不仅是一种实用主义的追求，更是一种生活理念，一种自我修养的道德观念，并体现在日常生活点点滴滴的好习惯中。

追求完善自我的一个方面是身体。这就体现在传统的健身房锻炼形式和新的诸如健身课程，24 小时健身房或者家庭健身等形式。仅在 2018 年，天猫男士运动手环的销量增长了 122%。这不仅反映出人们越来越多地将运动作为一种生活习惯，还表明了完善自我锻炼身体方面数据的重要性，对于男士而言，他们一直都对科技十分感兴趣。

自我完善还包括知识和心灵。男性用户在顶级知识应用程序中占大多数，例如知乎（69% 为男性）和得到（60% 为男性）这两个 app。在付费内容方面，截至目前，排名最高的类别是“个人成长”，占内容的近 50%，这再次表明了现代中国男士对持续的技能 and 知识培养的关注。



男性用户占顶级知识应用程序的用户主体

02.

消费独立性和参与度均有所提高

美团 CEO 王兴曾经说过，最有价值的消费群体等级依次是：少女 > 儿童 > 少妇 > 老人 > 狗 > 男人。这种传统观点反映出除了一些如电子产品之类的特定商品外，让男性参与到高端消费中是十分困难的。简而言之：男人缺乏能够推动消费的兴趣和爱好。

情况正在迅速变化。从体育到音乐，时尚，旅行和个人保健；男性正在发展新的兴趣爱好，更积极地进行消费。这种变化的标志之一就是专注男性的电商平台的兴起。例如，毒最初是为稀有运动鞋提供评估服务的应用程序。现在它已发展成为一个全面的电子商务平台，拥有大量男性用户，2018 年的总交易额超过 100 亿人民币。有货是这一波男性消费发展的另一个受益者，其年增长率为 100%。值得一提的是，除了更传统的运动鞋和街头服饰之外，它还包括一系列男士护肤产品。

各方参与者所创造出的“男士版小红书”或许可以成为这次全新男性消费文化崛起的最终证明。凭借最新推出的男性种草社区 CHAO，知乎朝着这个方向迈出了最雄心勃勃的一步，这个新 app 旨在为男性用户推荐好物和生活方式，并提供关于潮流单品的试用测验。



美妆个护产品正在进入流行的男性电子商务平台，例如有货。来源：有货 app



男性种草社区 CHAO：知乎打造的男士版小红书。来源：男性种草社区 CHAO

03.

颜值即财富

最近，根据求职平台 BOSS 直聘的调查显示，有 95% 的年轻人才认为外表对薪资有直接影响。众所周知的“颜值经济”一词主要惯用于通过外貌得到一定社会地位和经济成功的女性，尤其是在社交媒体时代，人们对视觉上的观感更加痴迷。

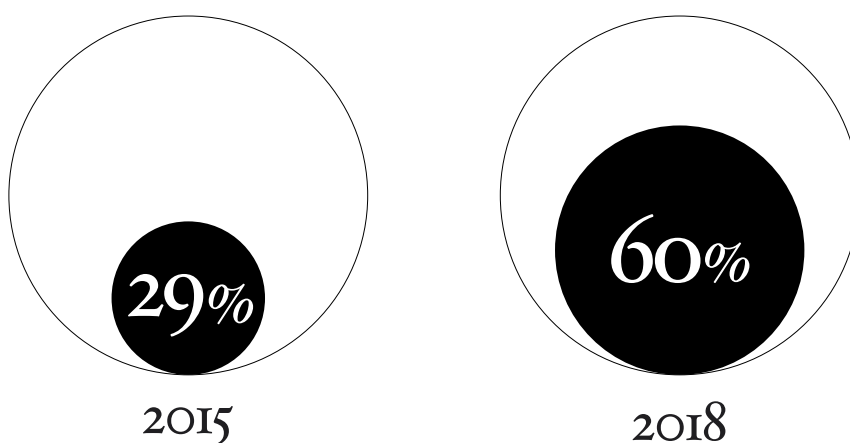
现在，90 后和 95 后的男性越来越多地将颜值视作一种财富，他们对自己的外貌也

十分重视，以期在现实世界得到优势。这种优势可以在工作场所带来丰厚的回报，颜值可以与教育背景相辅相成，以打造出完美的白领形象。颜值也能够帮助女性赋权，改变传统社会地位的影响。许多独立的，在职场上取得成功的 90 后女性对伴侣的期望已远不止于车和房。她们对约会对象的时尚风格，态度，文化和外表提出了越来越高的要求。

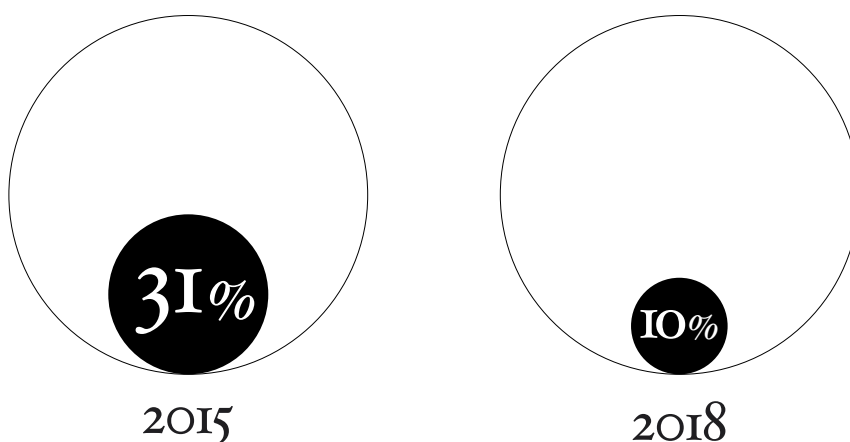
**男性接受颜值已成为社会
和经济成功的关键驱动力这一事实，
并参与到“颜值经济”中**

这种演变的标志之一，就是许多中国男性不仅接受了护肤产品，还开始接受美妆的概念。从“护肤”到“美妆”的跃升可能代表了这一过程中心态上最重要的转变。根据微博的调查，到 2015 年，有 31% 的用户“坚决反对”男士使用化妆品，有 29% 的用户则表示“坚决支持”。到了 2018 年，“坚决支持”的用户比例飙升至 60%，而“坚决反对”的用户比例不到 10%。

强烈支持男性化妆



强烈反对男性化妆



来源：知微数据

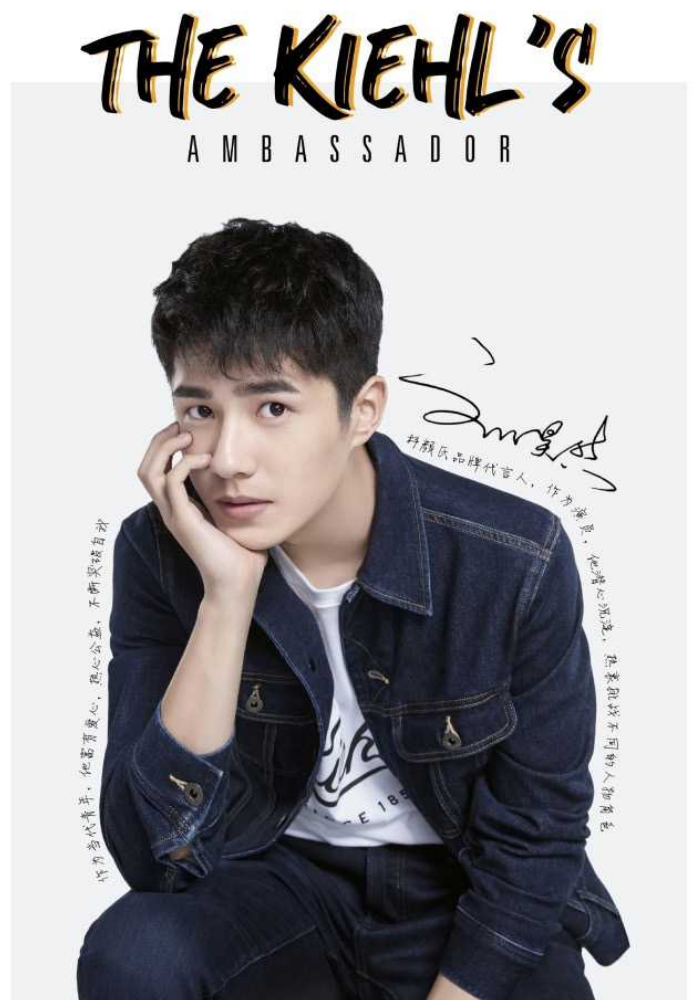
新一代的男子气概特点 反映在品牌创意中

由



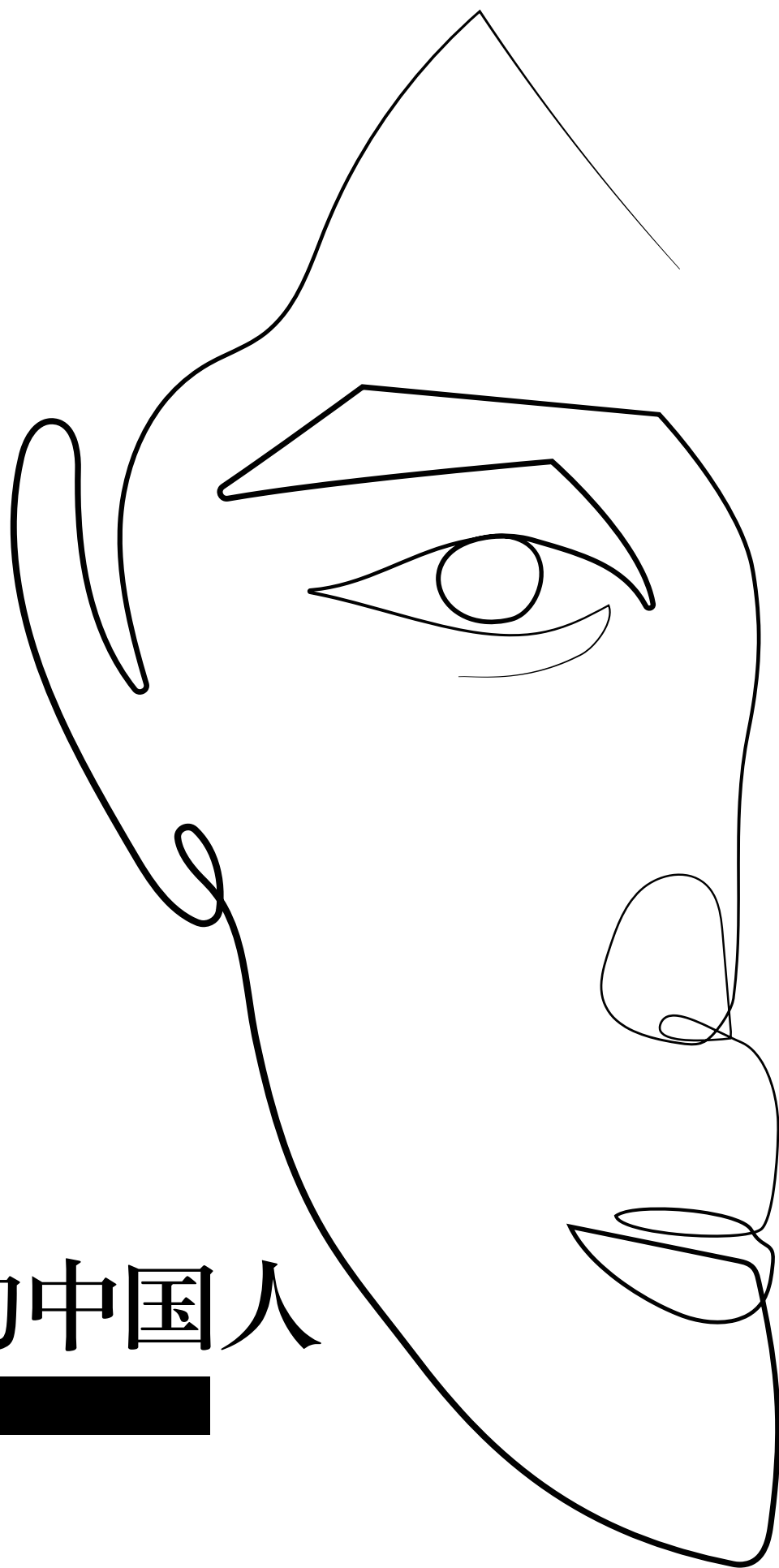
- 原始力量
- 雕塑一般的模特
- 力量投射

到



来源：天猫

- 轻松愉悦
- 态度
- 接地气



新一代的中国人

男士美妆常规流程

整体而言，男士美妆长势正盛。
但是想要充分了解这种趋势所带来的商机，
必须读懂头条新闻背后的信息，
更深入地了解新的男士美妆常规流程。
哪些产品可以视为主流？ 哪些增长最快？
消费者是如何过渡到新产品的？

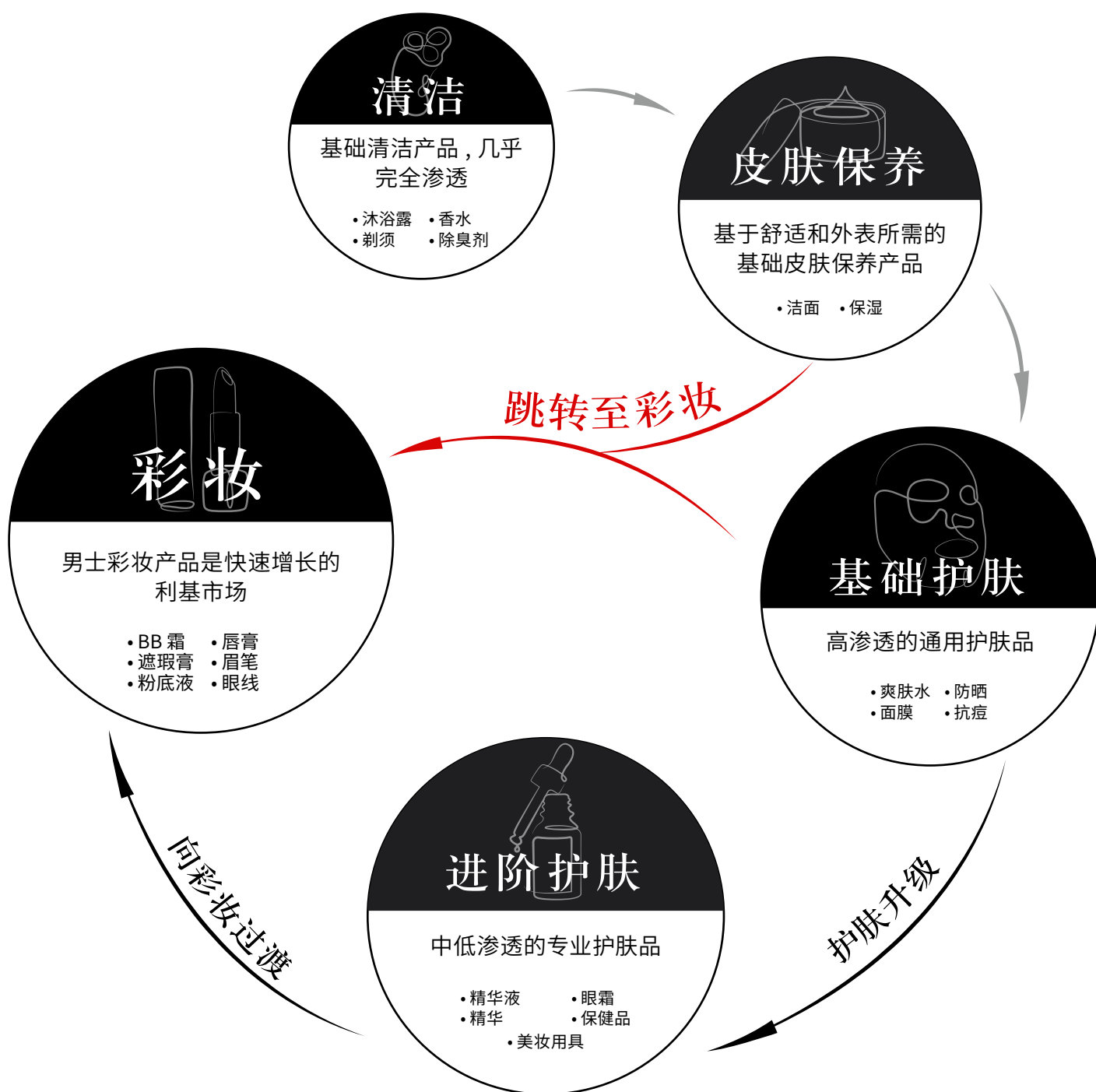
来源：天猫



OI.

从男士清洁到男士彩妆： 绘制男士的“美丽之旅”

根据我们的经验，我们将男士美妆常规流程按照精细程度分为 5 个不同阶段，
每个阶段分别对应不同的行为和产品。



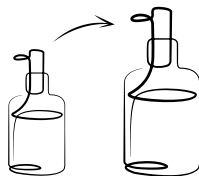
男士美妆重点增长品类

249%

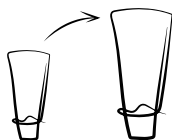
双十一期间 BB 霜购买量增长

126%

男士精华购买量同比增长



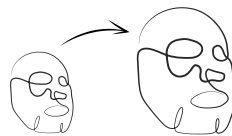
来源：天猫



来源：天猫

168%

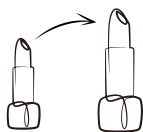
男士面膜销量同比增长



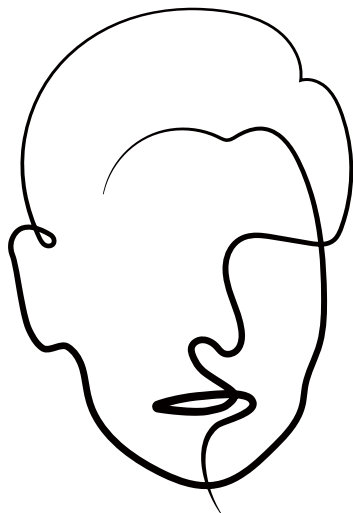
来源：阿里妈妈

278%

男士唇膏销量同比增长

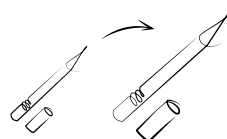


来源：天猫



214%

眉笔销量同比增长



来源：天猫

最开始，男士美妆的概念更多偏向于皮肤保养这一品类，即保湿产品和清洁产品。这两种产品在市场上可谓历史悠久。大众接受度高，已经成为现代男士的“必备品”。欧莱雅和妮维雅等大众市场的先行者在这些品类中享有很高的市场份额。

尽管它们的渗透率很高，但“皮肤保养”品类仍增长强劲，这主要归功于使用频率的提高和购买品牌的升级。例如，据阿里

妈妈数据显示，2018 年男士清洁产品销量同比增长 72%。

接下来的进阶产品就是我们所谓的基础护肤品，包括爽肤水，面膜和防晒等单品。这些产品具有很高的渗透率，尤其是在年轻和高端受众群体中（根据最近受天猫和欧莱雅的调查，85% 的男性受访者使用至少一种护肤产品）。尽管使用频率可能因人而异，但是对于注重外表的男士而言，这些产品已成为他们惯用产品的一部分。

面膜销量同比增长168%，
代表了男士美妆常规流程的升级



面膜逐渐成为男士美妆的重要组成部分。来源：天猫

根据阿里妈妈的数据，在这一品类中，男士面膜是取得突破性增长的单品，2018 年同比增长 168%。根据 360 的数据，防晒是另一个强劲增长的单品，2018 年搜索热度增加了 114%（所有品类中最高）。来自头条的数据也证实了面膜和防晒在 2019 年第一季度男性用户关注度最高的产品类别中排名前两位。

从基础护肤开始，许多男士开始朝着进阶护肤迈进。我们相信，这种转变标志着护肤从生活必需（“因为我需要”）转变到一种对生活方式的追求（“因为我想要”）。在进阶护肤产品中，我们看到了具有复杂配方和更具针对性效果的产品，例如眼霜，精华和精华液。这些产品通常与抗衰老或平衡忙碌的生活方式以及频繁加班的影响有关。其它一些新兴品类，例如美妆用具和护肤保健品也可以分入这一组。

整体而言，2018 年男士面霜销量同比增长 101%，而男士精华液购买量同比增长

了 126%。需要注意的一个有趣因素是，男性消费者倾向于从女性品牌购买例如精华液之类的进阶产品。虽然 2018 年男士精华液销售额增长了 126%，但来自专注于男士产品品牌的销售额仅增长了 26%。虽然附送赠品可以解决一些问题，但毫无疑问，男性消费者使用女士精华存在着强大的“隐藏市场”。例如，SKII 就因受到许多男性消费者的青睐而闻名。

最后，再进一步的话，许多（尽管不是全部）男士都逐渐主动从护肤转向彩妆。在天猫，男士彩妆产品的年增长率为 89%，比香水，护发，身体护理和面部护理产品的增长率都要快。男性通常会通过尝试 BB 霜和遮瑕膏打开这个新世界，因为这两个产品在广告宣传中经常将自己打造成“隐形”产品，只是用于遮掉细小瑕疵但同时保持自然肤色，仿佛给皮肤用了“作弊器”。结果是：与 2017 年相比，2018 年双 11 BB 霜和遮瑕的销售额分别增长 249% 和 192%。

更为引人注目的是唇膏和眉笔的崛起，这两种产品 2018 年的销量在天猫上分别增长了 278% 和 214%。这表明，男士正从单纯关注皮肤转变为“全脸美妆”。

尽管这些增长数字让人印象深刻，但必须记住的是，男士彩妆仍是一个新兴市场，渗透率相对较低。为了让该品类成为主流，品牌仍需要在营销和产品上做出持续努力（有关此主题的更多观点，请参见下文）。但是，我们确实注意到 95 后和 00 后消费者对于这些产品的使用率有着显著上升。例如，艾瑞咨询（iResearch）的数据就表明，95 后的消费者中有五分之一使用 BB 霜和眼线。



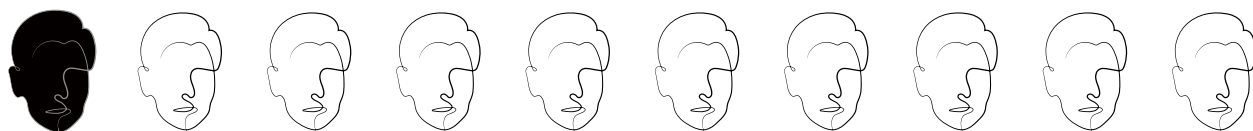
五分之一的 95 后消费者使用 BB 霜



五分之一的 95 后消费者使用眼线



十分之一的 95 后消费者使用眉笔



来源：艾瑞咨询

02. 升级进阶的三个机会

如果从整体上考虑市场，我们会发现大多数中产阶级消费者处于其“美妆之旅”的“皮肤保养”或“基础护肤”阶段。对于品牌而言，我们发现消费升级有 3 个重大机会：

护肤升级：从基础护肤品入手的消费者逐渐了解这一品类，找到自己喜欢的品牌，并对自己的护肤需求有更深入的了解。他们可能会开始升级自己用的基础产品，同时在日常护肤流程中使用诸如精华，眼霜甚至保健品之类的产品。

过渡至彩妆：经验丰富的护肤消费者逐渐接受了使用彩妆。他们将其视为追求更美丽肌肤顺理成章所要采取的下一步，并开

始尝试使用一些简单的产品（如 BB 霜），然后逐步尝试更多“进阶”品类，比如眼线或唇膏。但应注意的是，向彩妆的过渡是重要的一步，代表着思维方式的转变。许多的消费者，尤其是 80 后，可能永远无法通过护肤进一步升级转向彩妆。

跳转至彩妆：对于那些受过高等教育且已经采用复杂护肤流程的精英类消费者来说，彩妆显然具有更诱人的市场。现实情况表明，许多品牌，尤其是中国的新品牌，都瞄准了 95 后和 00 后消费者，希望他们能直接跳转到使用彩妆。对于我们来说，这一趋势对新品牌而言是最佳机会，能够塑造新一代“美妆原住民”消费者的消费习惯。

来源：天猫



许多年轻消费者正直接“跳转” 到接受彩妆的使用



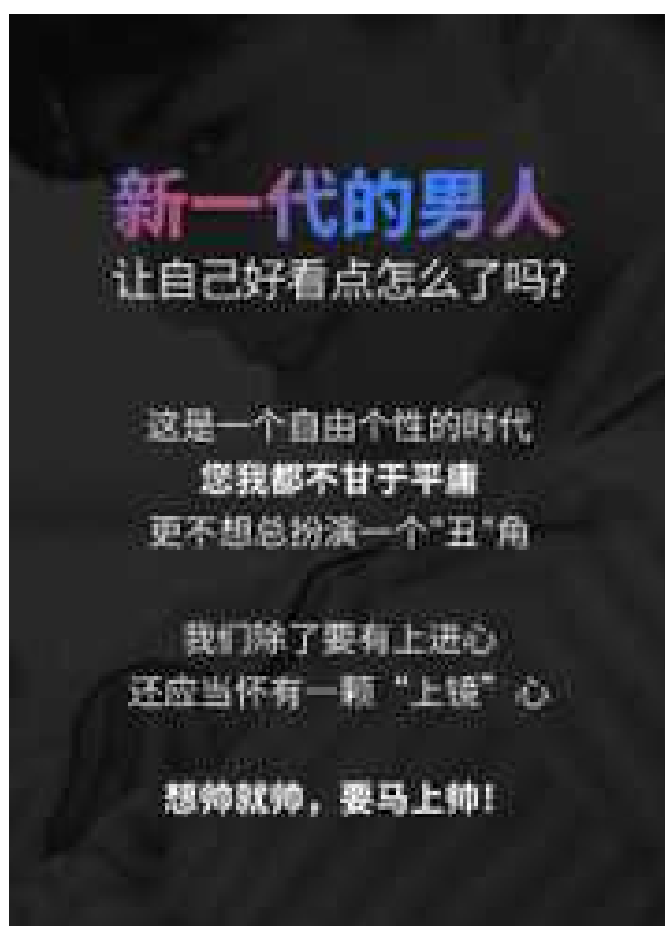
男士修颜气垫BB霜

轻松上妆
拒绝麻烦

- 提亮
- 隔离
- 修饰
- 遮瑕
- 保湿
- 不油腻

赫恩 男士

赫恩代言人:陈龙



新一代的男人
让自己好看点怎么了吗?

这是一个自由个性的时代
您我都不甘于平庸
更不想总扮演一个“丑”角

我们除了要有上进心
还应当怀有一颗“上镜”心

想帅就帅，要马上帅!

赫恩呼吁新一代男士通过颜值取胜。来源：天猫

如何制胜：

接触、吸引新一代的

中国男性美妆消费者



显然，男士美妆流程正变得越来越复杂，
这为短期销售增长和长期品牌建立提供了巨大的商机。

但是品牌应该如何在这个市场上取胜？

如何将宣传，产品和渠道整合在一起，
来接触并转化新一代的中国男性美妆消费者？

虽然没有能够保证成功的万能公式；

我们总结出了我们认为该领域的品牌

应遵循的 4 条关键原则。

来源：天猫



OI.

发挥女性的指导和影响力

尽管男性越来越主动地参与美妆过程中，但不可否认的是，他们仍然受到周围女性的强烈影响。女性，无论是他们的妻子，女朋友还是女性朋友，都可能影响到他们的购买，影响他们的选择，而且她们自己往往也是男士美妆产品的购买者。来自阿里妈妈的数据表明，女性购买了多达55%的男士面霜和70%的男士面膜。

面对“低垂之果”，专注于男士的品牌应开展针对性活动，以发挥女性的影响力。例如马丁，这个品牌专注于男士护肤，在天猫男士美妆类排名前五。马丁的大部分销售额集中在在京东和天猫上，但它也利用女性占主导的小红书开展赠品活动，来吸引年轻女性。

同样在小红书上，韩国高端护肤品牌雪花秀通过修改某些产品的名称，来鼓励女性为男性购买产品。例如，其明星产品在天猫上的名字很简单，就叫做“清爽洗面乳”，在小红书上则有了“老爸老公爱上洗脸”的新昵称。欧莱雅还采用了“还你一个清爽男票”这类好玩的名字作为套装昵称。



欧莱雅“还你一个清爽男票”套装
来源：淘宝网



雪花秀“老爸老公爱上洗脸”洗面乳
来源：淘宝网

02. 采取“数字时代原住民”的心态

与女性相比，男性缺少线下购买美妆产品的经历。他们并不需要直接体验商品，去闻，去感受质地，去试用。对于大多数男性而言，美妆依旧是他们参与度较低的品类，他们更重视的是哪个品牌更便利。这就为新的本土线上品牌创造了机遇。

在天猫上最畅销的化妆品品牌中，我们可以看到许多熟悉的名字，例如欧莱雅，资生堂 UNO 吾诺和妮维雅。但是，除了这些品牌之外，还有一些新品牌（通常它们的销量更高），例如马丁，左颜右色以及



马丁代表了直面向消费者的新一代男士美妆品牌。来源：淘宝网

赫恩。它们代表着新一代的男士美妆品牌，精通电商渠道，擅长数字化媒体宣传，懂得利用社交媒体，性价比高。基于它们的主要增长渠道，这些品牌通常被称为“淘品牌”和“播品牌”。

马丁的例子很能说明问题。自 2017 年末推出以来，马丁现已成为天猫和京东同级别产品中表现最好的品牌之一，在两个平台分别拥有 20 万和 22 万粉丝。马丁复制了其他 2C 品牌的最佳案例，将相同的明星成分（古龙水）扩展，用到了从洗发水到面膜，防晒，精华液甚至私密产品等一系列各种价格合理的产品中。通过产品的简单化和一致性，此举为所有护肤需求提供了“一站式”解决方案。为了促进并加大重复购买，它还在包括天猫，京东，小红书和微信小程序等社交和电商生态系统中扩展了业务范围。

通过马丁的案例，我们还注意到利用京东转化男性消费者的重要性。尽管女性护肤品销售平台的地位远远落后于天猫，但以男性用户为主要用户群的京东在男士美妆热潮中占据优势，无论哪种品牌，都应该把京东看作这一市场中的头等优先渠道。

新兴的数字本土品牌 通过数字渠道 对传统品牌发起挑战

另一个数字化推动增长的例子是左颜右色。左颜右色成立于 2012 年，每月销售超过 75,000 瓶明星产品 BB 霜，这要归功于品牌对在线短视频的精通。它在斗鱼上收获超过 100 万个赞，在微视频应用“快手”上有 22,000 个关注者。左颜右色在

这两个视频平台上都很活跃，发布的内容更多地借鉴了闹剧喜剧和“沙雕文化”，而非传统的护肤知识讲解。该品牌特别与主播许华升合作，制作了一系列幽默视频来宣传火山泥洁面乳。所有内容均会重定向至其天猫店面，以推动直接转化。

左颜右色的快手内容大量借鉴了“沙雕文化”。
来源：快手 app

左颜右色通过其快手店从视频中直接转化客户。
来源：快手 app





电子竞技和常规运动：高夫汇集了新一代和传统男士护肤的核心。来源：天猫

03.

探索新的文化领域来吸引 男士美妆消费者

从代言人的选择到内容的制作，男士美妆的崛起迫使许多品牌重新审视其传统营销方式。尽管越来越多的男士开始关注自己的外表和皮肤，但他们的护肤美妆的精细程度在总体上仍然受到限制，大多数男士仍然通过其他文化领域接触到美妆。品牌面临的挑战就是要通过适合的内容，和其他各方展开合作，将自己植入到这些文化领域。

长期以来，美妆品牌直接触男性消费者的

传统领域之一是运动。贝克汉姆或克里斯蒂亚诺·罗纳尔多等运动员很早就开始了和美妆品牌的合作。尽管这不是新事物，但是运动这张牌对于建立与男性消费者之间的文化相关性依旧十分有效。碧欧泉与中国篮球队的知名球员开展了紧密合作，并将篮球元素纳入其最新的快闪店中。2019年初，曼秀雷敦与NBA超级巨星林书豪签约，而高夫则在其最新的宣发中选择了田径选手谢振业。

尽管体育运动仍然是吸引男性消费者的可靠途径，但我们认为，品牌在探索新兴文化领域时应更加大胆。在这些领域中，最主要的就是网络游戏，网络游戏在过去的几年中已经从从低端职业变成了时髦的生活方式。妮维雅，LAB 和碧欧泉最近都与职业电竞团队或顶级玩家建立了合作伙伴关系。碧欧泉在游戏领域特别活跃，赞助了《王者荣耀》游戏，并与具有电竞背景

的品牌大使一起直播。碧欧泉最近的营销宣传很多都与游戏相关，将其产品类比为游戏中“升级”皮肤的“武器”。LAB 的营销宣传则使用了很多游戏语言：其的新款爽肤水，受到 IG 的认可推荐（IG 是中国顶级电竞团队之一），“辅助”颜值，“Gank”角质，净化肌肤。除了借助游戏用语进行营销宣传，我们认为游戏提供了与 IP 深入合作和游戏内广告植入的巨大商机。



LAB x IG 团队合作。来源：天猫



产品说明从游戏语中大量借用。来源：天猫



碧欧泉将游戏作为其最新的品牌活动核心。来源：微博





网络游戏成为许多男士美妆品牌的新战场

还有其他一些品牌是通过时尚和街头文化的角度来营销美妆产品的。比如前文提到的毒和有货，街头服饰一直是推动男性消费文化发展的关键品类，而美妆品牌设法在这一空间中立足，以赢得更大的成功。例如，高夫最近与潮牌 NPC（New Project Center）合作，围绕“有颜有面”的概念举办了一次快闪活动。该活动结合了时尚与护肤，让男士注重颜值，一潮到底。

接下来，我们预计品牌会进一步与明星，其他品牌，数字平台或 IP 等方面的男性流量领头羊展开合作，发挥更大的创造力。



高夫与 NPC 融合了护肤与时尚，致力于让男士“有颜有面”
来源：微博

04.

科普产品功效来触发购买欲

发展男士美妆市场的主要挑战之一就是科普。大多数男性在美妆护肤领域仍然知之甚少。要释放市场的全部潜力，品牌必须对受众进行产品，使用和功效方面的科普。很多时候，品牌方的工作不仅是销售特定产品，而是销售整个品类。通过回顾不同品牌的内容，我们确定了3个关键的消息传递角度，这些角度已有效地向男性消费者科普了升级配装产品提高开支的重要性。

女性验证：如前文所述，对于在日益竞争激烈的约会市场中，女性对于男性的外貌与时尚有着更高的要求，此时颜值对于男性就尤为重要。因此，许多品牌自然而然就将重点放在了这里。许多营销宣传强调了女性对于男性外貌颜值的期望，而男性则需要尽力达到期望。过去，男性多因不够成功而感到自卑，而现在，他们还会因为没有足够重视打扮自己忽视了外表而自卑。许多类似内容都略有夸大，借鉴了网络上的表情包来以一种较为幽默诙谐的方式来传递着信息。左颜右色特别热衷使用这种简单粗暴的方法，利用微视频展示出糟糕的皮肤是如何毁掉潜在艳遇机会的。

从许多方面来看，这些持续不断的信息展现出女性期望对于推动男性接受护肤的重要性，同时，也展示出消费行为与更广泛的文化和趋势相联系。



左颜右色在快手发布的内容直白的展示了皮肤好坏对于男性魅力的影响。来源：快手 app

皮肤问题 陷人窘境



面试

熬夜熊猫眼，面试秒被×



约会

满脸痘痘印，约会惨被拒



聚会

密集大毛孔，聚会遭嫌弃

欧莱雅的 BB 霜可以使男士在关键情况下保持最佳状态。来源：天猫

表现和自信：传统男性生活方式既适用于工作场合又适用于社交活动。美妆品牌自然也就着重使用相关话术来宣传其产品的功效。护肤成为帮助男性在重要时刻获取优势的工具。

碧欧泉在最近的营销推广中使用游戏进行类比，唤醒男性的竞争精神，呼吁男性使用碧欧泉来“开启高能模式”。许多其他品牌将产品功效与具体场景相关联，其中最重要的场景就包括加班工作，运动和商务旅行。这种短期的，基于具体场景的，以功效为导向的宣传模式，与女性美妆领

域更常见的“长期护肤管理”概念形成鲜明对比。

便利：“男人是懒惰的”这一句老生常谈蕴含着真理。正如我们前面提到的，许多男性认识到他们需要更好地照顾自己，但又接受不了这样做所需要投入的大量时间。他们期望产品能够提供立竿见影的结果，同时又不会影响他们的日常行为习惯。许多品牌通过强调护肤产品的便利性，以及产品可以无缝整合到男士的繁忙生活中这两点来解决这一问题。

BB 霜的案例最为有趣。这个领域的大多数品牌都将 BB 霜作为集保湿，清洁和美妆于一体的神奇产品来宣传。品牌方展示了 BB 霜能够怎样减少男士在护肤上花费的时间和精力。左颜右色声称其 BB 霜可将复杂的护肤流程压缩至只使用这一种多功能产品，从而为消费者省出了半小时睡眠时间。



马丁帮助光鲜亮丽的男士在人群中脱颖而出，并在工作中更受关注。来源：微博



MORE SLEEP

让你每天多睡半小时



不用早起
30秒提亮



不用卸妆
植物养肤



早晚呵护
水光透亮

FROM HAIR ROOT TO HAIR TIP

左颜右色的宣传：简化美妆流程，让你多睡半小时。来源：淘宝网

花式贴膜说明书

教你一言不合就贴膜

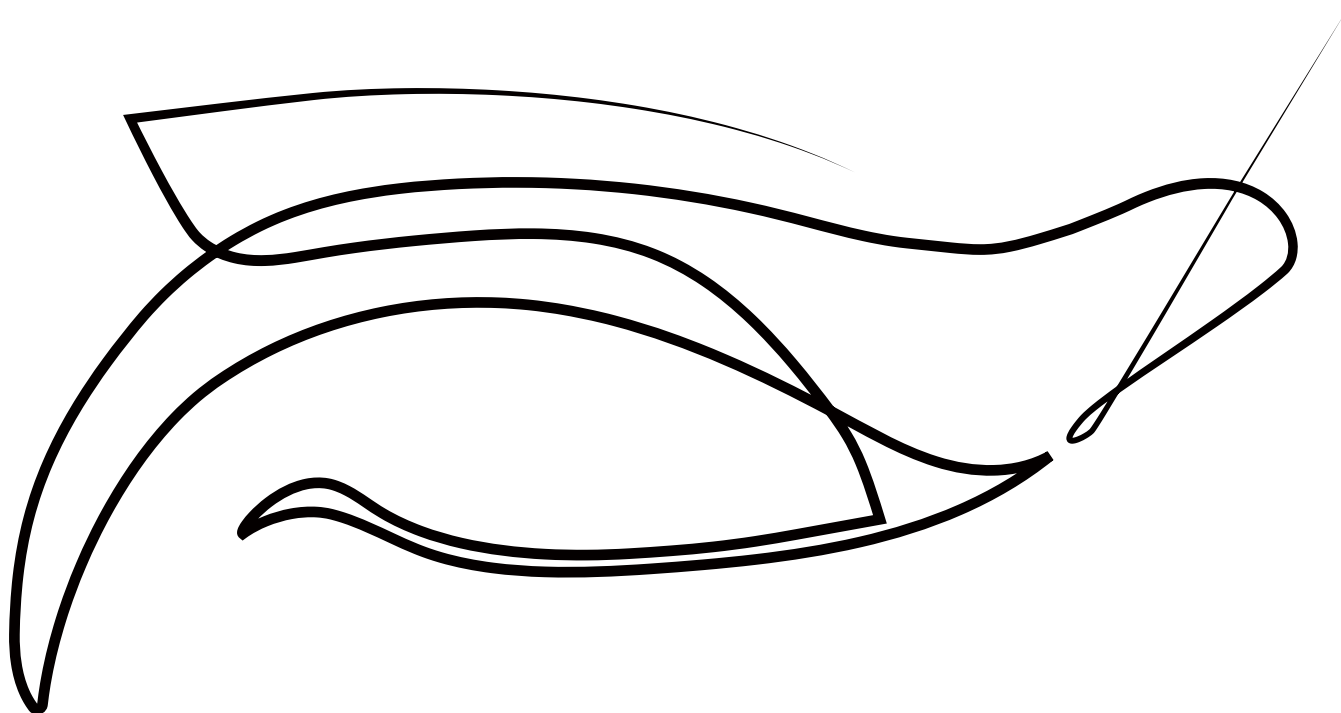


用欧莱雅, 像男人一样敷面膜。来源：淘宝网

欧莱雅等大品牌也以便利来吸引男性消费者。欧莱雅男士面膜产品的页面几乎完全围绕其产品的便利性做文章：可撕开包装而不会损坏面膜，面膜足够坚固不会被撕裂，其大尺寸的设计适用于男士的面部，可以在运动时敷上面膜，只需 5 分钟即可起效。

如何致胜：

让彩妆成为主流



尽管减少男士美妆产品比重
而转向彩妆可能是错误的选择
但不可否认的是
这一品类不仅为现有品牌和新玩家提供了最高的增长率
同时也为创新提供了最大的机会

来源：天猫

MAKE-UP

BEGINNER BB CREAM

NEW STYLE



在早期阶段，男士彩妆发展的驱动力是采用进阶护肤流程的高端客户，他们敢于尝试彩妆，即便是女士彩妆产品。这些早期使用者通常极具魅力，时尚而大胆。然而，男士彩妆的未来发展不会像是过去那样。增长点将不仅仅来源于时尚先锋，而是通过将美妆大众化，让新的消费者接受、习惯、主动想要去使用。只有时间能证明不同的品牌如何应对这一挑战。从我们的角度来看，我们认为可以采取三条途径能够高效的将彩妆融入男士日常生活之中：

自然之美胜过魅力：获得主流认可的关键

之一在于品牌要让整个品类都能获利。女士美妆与时尚息息相关。它与消费者的个人风格紧密相连，提供不同的颜色让消费者去尝试不同的风格类型。随着时间，这个概念也可能会逐渐被男性消费者接受，但对于大多数男士美妆购买者来说还为时过早。现今男士美妆提倡的依旧是隐形，突出自然五官，巧妙地改善外貌而不会引人注意。男士美妆的重点不应放在彰显风格魅力，而应着重打造清爽自然又健康的妆容。我们甚至看到一些品牌着力于将自己的产品和女士美妆同类产品进行对比，突出差异，来消除消费者的顾虑。



本土品牌和风雨宣称其男士唇膏不同于女士口红，以缓解消费者对妆容过重的担忧。来源：淘宝网

NO SENSE OF PARTICLES

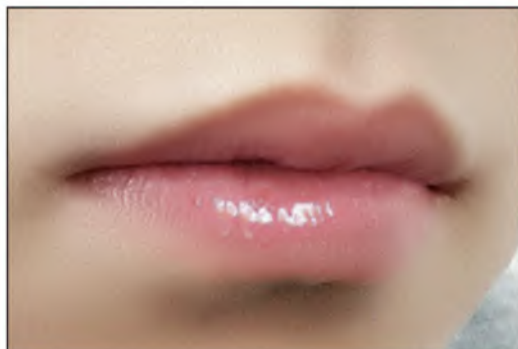
无颗粒感

一抹细腻可见，无粉末感，不会像女士口红那么尴尬。

A TOUCH OF DELICACY, NO POWDER, NOT AS AWKWARD AS
A WOMAN'S LIPSTICK.



LADY



MAN

来源：淘宝网

化妆是职场上的利器：男士美妆依旧需要定位精确且具备实用案例的宣传，将其与男士对于外形的顾虑相关联，以形成长期使用的基础。在这方面，韩国值得参考。韩国男人以最早使用彩妆而闻名，这在很大程度上受到功利主义和职场因素的影响。在竞争激烈的就业市场中，外表是年轻专业人才对于来说不可或缺，颜值能够帮助男性在职场中走得更顺。正如我们在本文中所写到的，颜值对收入的影响在中国已经广为人知，我们也预见到，如果品牌能够成为年轻职场男士的必备，那么就很可能获得巨大成功。这样一来，重要的就不仅仅是营销宣传，

产品款式也需要加强，让其更为便携，要求出差在外和居家使用都要便捷。

对产品款式进行创新以吸引消费者：许多男士回避彩妆产品，是因为他们对于自己使用彩妆依旧有顾虑。我们认为产品款式是转化男性消费者，引领他们进行初次消费和重复购买的最重要因素之一。在形成购买习惯的初期，正确的款式可以鼓励消费者进一步探索，把产品定位为男士专用，通过新颖的外形设计来吸引消费者。购买之后，简单易用的款式还可以帮助美妆初学者养成使用习惯。

款式还可以提高消费者的使用频率，尤其是出门在外。可以把产品打造成配件的样式，让男士在公共场合使用起来更易接受。品牌应大胆尝试不同的包装设计和产品形状，以更好地迎合男性的审美敏感和使用习惯。



韩国品牌 MIP 为男士美妆带来更男性化的工业设计美，来源：淘宝网



锐度的眉笔包装在时尚且更男性化设计的盒子里。来源：淘宝网



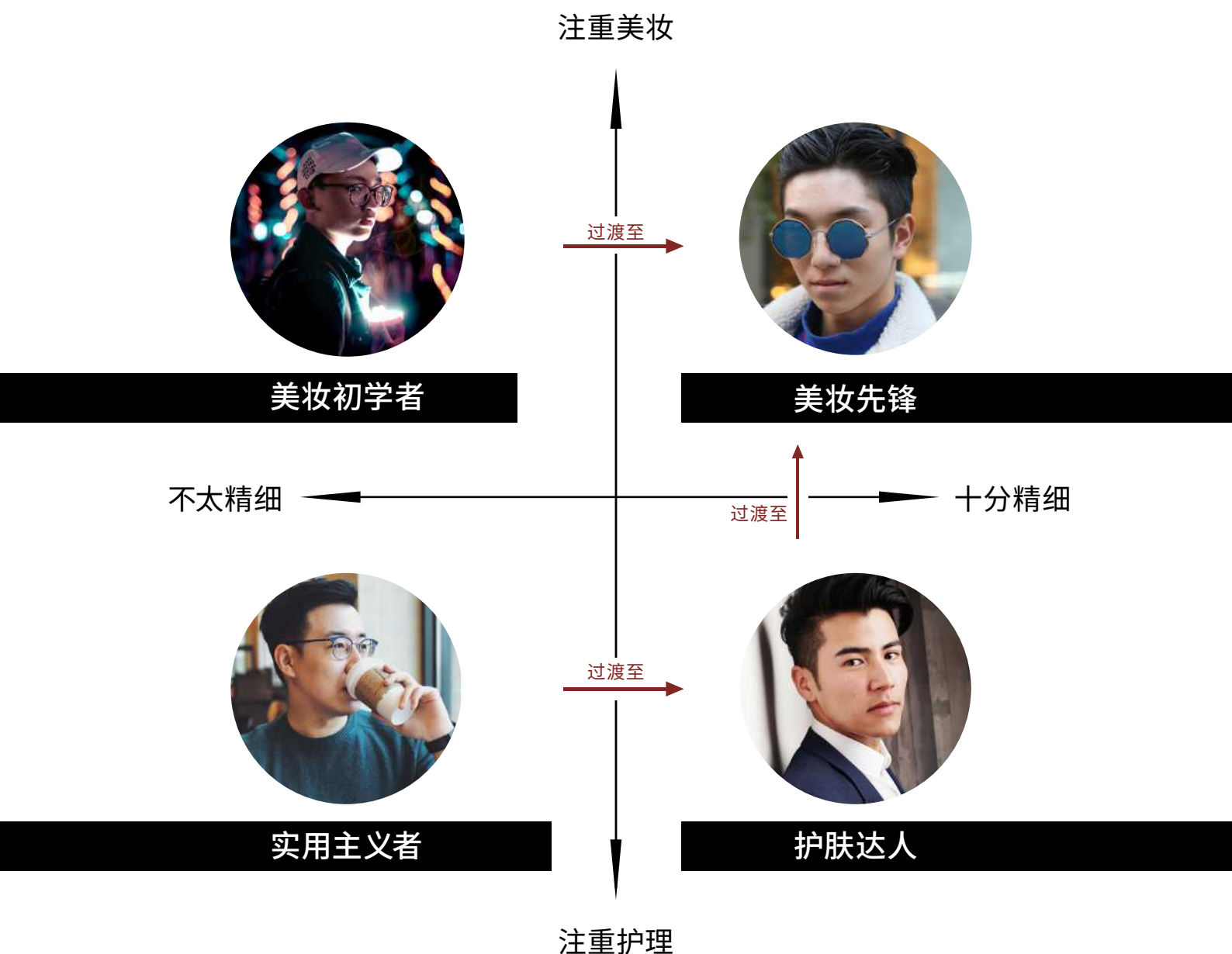
如何致胜：

找到正确的男士美妆消费者类型

并满足其需求

我们已经了解了不同美妆产品吸引男性消费者的方法趋势和最佳案例。从中分析，我们可以得出，男士美妆并不是铁板一块，而是千人千面，不同的消费群体展现出了不同的需求和行为。要在这个领域取得成功，品牌就必须清楚地意识到他们针对的是哪种男士美妆消费者，品牌自己的目标又是什么。

结合我们自己的经验与多个第三方数据集，根据其护肤方法和精细程度，我们建立了男士美妆消费者类型分类。



实用主义者

概 况

- 了解护肤的必要性，感受到这样做的社会压力
- 非常实际的顾虑：讨好女友，在客户面前看起来更精神，避免尴尬.....
- 不愿意花时间购物或使用护肤品。愿意追求简单
- 极不可能主动地查找护肤产品或内容。通过其他感兴趣的领域（体育，视频游戏.....）了解到美妆这一领域
- 只要回购容易，就极有可能固定购买某一品牌，并且可能会坚持用熟悉了的产品
- 重点产品：洁面，保湿，基础款面膜



来源：Unsplash.com

顾 虑

- 如何在约会或工作面试等关键场合确保皮肤状况不会拖我的后腿？
- 我应该买什么？我如何才能选择合适的产品？
- 哪些品牌和产品可以针对基本问题最快起效？

方法和机会

- 设置简单的护肤流程，针对不同场合使用
- 通过套装提供“一站式”产品
- 通过忠诚度和订阅来推动重复购买
- 逐步开展有关护肤最佳案例的科普，以鼓励更多的消费者参与到这一品类



来源: Unsplash.com

护肤达人

概 况

- 高端和奢侈品牌护肤品的现有消费者
- 使用较为复杂的美妆护肤流程，包括专用面膜，精华液，眼霜等产品。
- 包括护肤品消费者，愿意花时间了解产品
- 十分注意产品的成分，配方和质地
- 如果找不到合适的男士产品，可以在某些品类中选择女士产品

顾 虑

- 我如何按照特定标准改善皮肤的状况和外表（例如：美白、眼袋）？
- 与女士产品相比，我如何能确保所用的产品同样具备最佳的成分和配方，同时又是专为男性皮肤而设计的？
- 我如何在美妆流程中增加新的步骤，以进一步提升颜值？
- 我如何获得最适合我皮肤和生活方式的护肤方案？

方法和机会

- 开发新的高端产品，为男士带来最新的护肤科学方法
- 通过引入新的护肤产品，例如保健品或工具设备，来将支出最大化
- 开发定制化服务
- 连接离线服务中心，以打造高端男士美妆“大品牌”

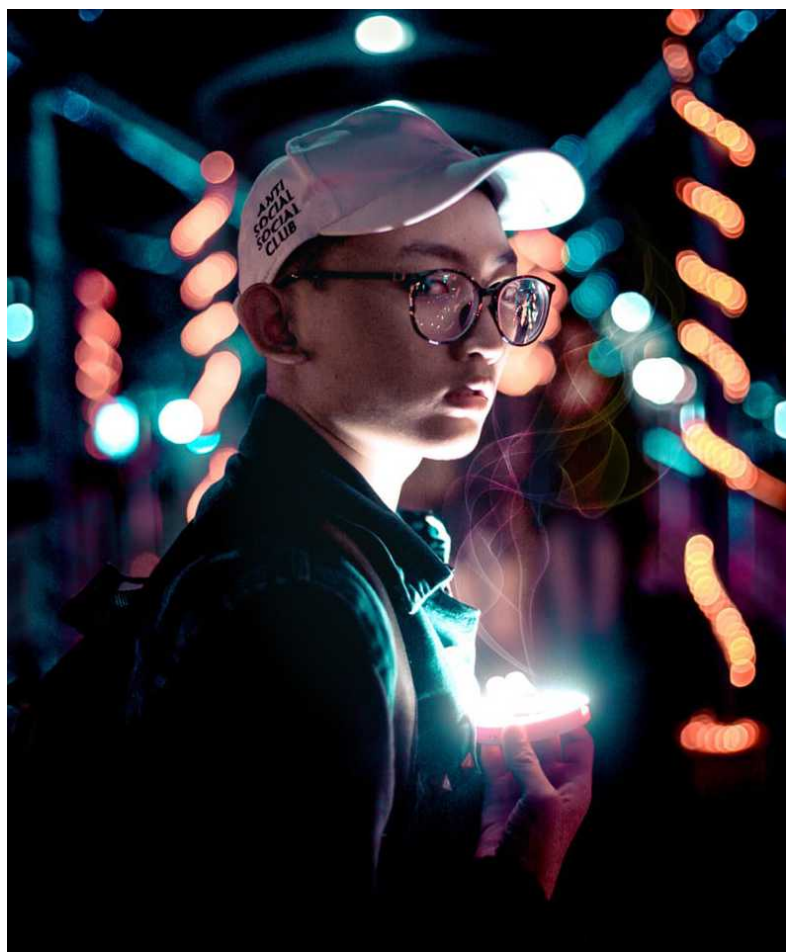
美妆初学者

概 况

- 主要通过服饰来修饰外形的时尚前卫男士
- 接受美妆概念，使用基础护肤和入门级彩妆产品，例如 BB 霜
- 渴望了解有关男士美妆的更多信息，但相对而言对该主题了解不足
- 对一些进阶彩妆（例如眼线或唇膏）可能仍有所保留，需要得到指导，消除疑虑

顾 虑

- 我如何找到优质且使用简便的男士美妆产品？
- 哪些形式的男士美妆是可以接受的？哪个适合我？
- 我怎样才能能在提升颜值的同时彰显男子气概？
- 我该如何去了解美妆秘诀和技巧，并运用在日常生活中？



来源 : Unsplash.com

方法和机会

- 为对于美妆感兴趣的男士进行科普，通过易懂易得的科普内容讲解日常美妆技巧
- 开发易于使用的入门级彩妆产品，让男性更容易开始尝试



Source: baidu.com

美妆先锋

概 况

- 最早一批开始化妆的男性
- 高度参与到这一品类中，将很大一部分可自由支配的支出用于护肤和美妆。在这两方面都购买高端品牌
- 护肤和美妆流程结合起来，较为复杂精细
- 既购买男士品牌产品也购买女士品牌产品
- 购买途径和受影响的方式与女性美妆消费者非常相似

顾 虑

- 我怎样才能找到最好的男士美妆产品？
- 我如何使用不同的颜色来改变妆容？
- 我如何通过我精致的妆容脱颖而出

方法和机会

- 推出男士美妆的高端和奢侈品牌
- 在基础产品之上进一步发展男士彩妆，并提供更多色彩和修容选择
- 打造进阶的男士美妆专属内容
- 对于成熟的女士美妆品牌来说，这个受众群体带来巨大商机，品牌可以将成功的女士品牌产品扩展到男士市场

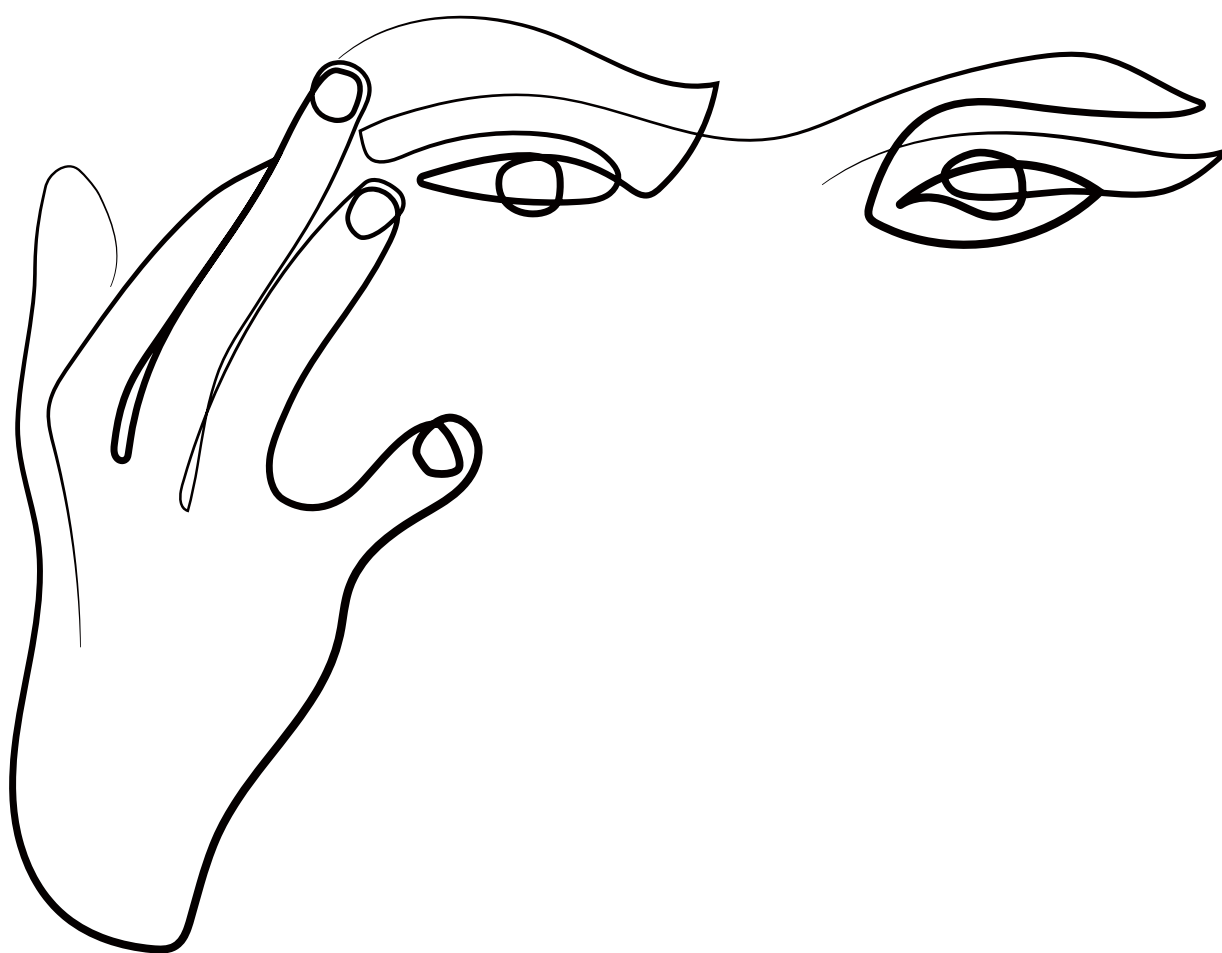
如我们所见，“男士美妆”蕴含了方方面面。并非所有男性在美妆流程和思维方式上都有相同的起点。也并非所有男性都有同样的美妆产品使用习惯。

从许多方面而言，男士美妆市场成熟的关键标志之一将是统一“男士美妆市场”这一构想的终结。几年后，男性将不会再被视为一个整体的细分市场。成功的公司将确定专营市场，并针对关键细分市场开发产品和品牌。

对于当今的品牌，无论是在市场占主导的老手还是新入局的玩家，问题已不再是男士美妆的潜力。这个问题已经解决掉了。问题变成了在男士美妆这个庞大的市场中，这些品牌想在哪些具体细分市场和品类开始博弈。

写在最后：

透过现象看本质



我们的这份报告旨在探讨男士美妆市场的不确定性。在结束前，我们想尝试探讨如何透过这些不确定性，对该市场的发展方向，提出我们的看法：

I

对于新品牌而言，男士美妆市场是终极商机。我们相信，直面消费者的本地数字原生品牌将主导市场，成熟的美妆企业也很可能收购新一代男士品牌，这与 2016 年联合利华收购 Dollar Shave Club 有所不同

2

就像运动服饰品牌带动了男性美容和香水市场的早期发展一样，我们希望男士潮流和生活方式品牌能够利用自身积累的资本和客户群基础，自行拓展或者通过合作成为美妆品牌

3

到如今，男士美妆产品在很大程度上仍模仿同类女士产品。在配方，包装和使用方式上存在着进行根本性革新的潜力，以更贴近男性的生活方式和行为习惯

4

男性对便利的追求将推动定制和订阅服务的兴起，
以提供最终的一站式美妆解决方案

5

尽管目前男性所需的“美妆场合”主要限于工作和约会，
但我们希望男士美妆市场能够模仿女性市场，
提供针对特定时刻和场合的多种护肤解决方案和“妆容”
(例如：运动，旅游，特定季节的产品...)



AIR PARIS

NEW YORK PARIS SHANGHAI



Air Paris 与品牌方开展合作，为新品牌的创建和品牌的成长制定综合策略。我们将品牌战略的所有变量进行清晰量化，并辅之以可行的行动路线图。

Air Paris 代表了卓越的创意和内容制作。我们通过各种渠道和形式，提供与众不同的品牌内容，帮助您建立品牌资产并推动品牌接触点的转化。

Beauty Clients

ESTÉE LAUDER

CLARINS

Elizabeth Arden

RéVive

LANCÔME
PARIS

MAYSU
美素

BOBBI BROWN

MAC

SHISEIDO

CLINIQUE

Kiehl's
SINCE 1851

LAB
SERIES
SKINCARE FOR MEN

KORRES

羽
YUE-SAI
西

BIOtherm
HOMME

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男士美妆

MALE BEAUTY REPORT

WHY MALE BEAUTY

IS CHINA'S NEXT

BRAND GROWTH STORY

AIR PARIS

NEW YORK PARIS SHANGHAI

In a 2011 interview with Global Entrepreneur magazine, AIR PARIS president Dimitri Katsachnias shared prediction that 'Men in Paris spent about 50 years moving from using cologne to accepting after shave, while in China it may only take one year' .

While the prediction proved prescient, the magnitude of the male beauty boom goes far beyond our predictions. Forget about after shave, Chinese men are enthusiastically embracing masks, serums and premium sunscreen. A new generation of beauty buyers is also catching up to Korea in adoption of color makeup products like BB cream or lipstick. Be it in terms of sales or behaviors, China is driving the development of the 122 billion USD global male beauty market.

Data from Euromonitor shows the Chinese male beauty market growing at over double global average (13.5% vs 5.8%). In an intensely competitive beauty market, men represent an attractive growth opportunity for existing brands and also attract savvy entrepreneurs eager to populate the market with new male only, digital native brands. From global behemoths like Channel to homegrown players like Martin, Chinese men's beauty enthusiasm is lifting all boats.

We believe that the rise of Chinese male beauty ranks amongst the most important macro trend we have encountered in over 20 years of activity in the beauty scene.

For this reason, we have compiled this in-depth report with the hope of bringing both clarity and perspective to the topic.

This exercise meant navigating data, culture and creative. It revealed to us consumer behaviors and brand strategies whose sophistication far exceeded our initial assumptions. It also showed to the extent to which men are re-defining the traditional industry playbook for brand creative, product innovation and brand experience design.

We hope that this report will inspire you and trigger ideas to turn the potential of male beauty into tangible growth for your brand.

For more information on how AIR PARIS can help your business, please visit **www.airparisagency.com**



Chris Krakowski
Managing Director China
AIRPARIS

A stylized, handwritten signature in dark ink, appearing to read 'Krakowski'.



Introduction

‘Sales of male makeup kits are up 401%.’ Such is the eye catching copy that is featured front and center in one of Tmall’s latest advertising campaigns meant to advertise the platform ahead of the 6/18 shopping festival.

More remarkable than the figure though is the tone and composition of the ad. Instead of a polished model, the visual features an average looking man in a mundane setting applying his makeup in an un-glamorous way.

What this creative choice communicates is that beyond its remarkable growth, male beauty and skincare is no longer the domain of a niche avant-garde. It has gone mainstream and in so doing is unleashing enormous opportunities for brand growth. From mass market digital native brands such as Martin to incumbent luxury beauty players such as Channel, the male beauty tide has the potential to lift all boats.

Tmall betting big on male beauty for 6/18. Source: Tmall.com

The Rise Of Male Beauty Creates Opportunities For Brands In All Segments Of The Market

NEW BRAND DISRUPTION

男士植物精华补水保湿面膜

15分钟快速补水



Source: Taobao.com

One of the top selling brands on Tmall and JD.com, Martin 马丁 represents a new breed of digital native, male only beauty brands offering high value for money

INCUMBENT INNOVATION



Source: Taobao.com

LAB Series is evolving its marketing playbook by working with pro-gaming teams to convert the new generation of male beauty consumers

LUXURY BRAND EXPANSION



Source: Chanel.com

With its 'Boy de Chanel' male makeup line, Chanel is amongst the first luxury brands to bet heavily on the male market

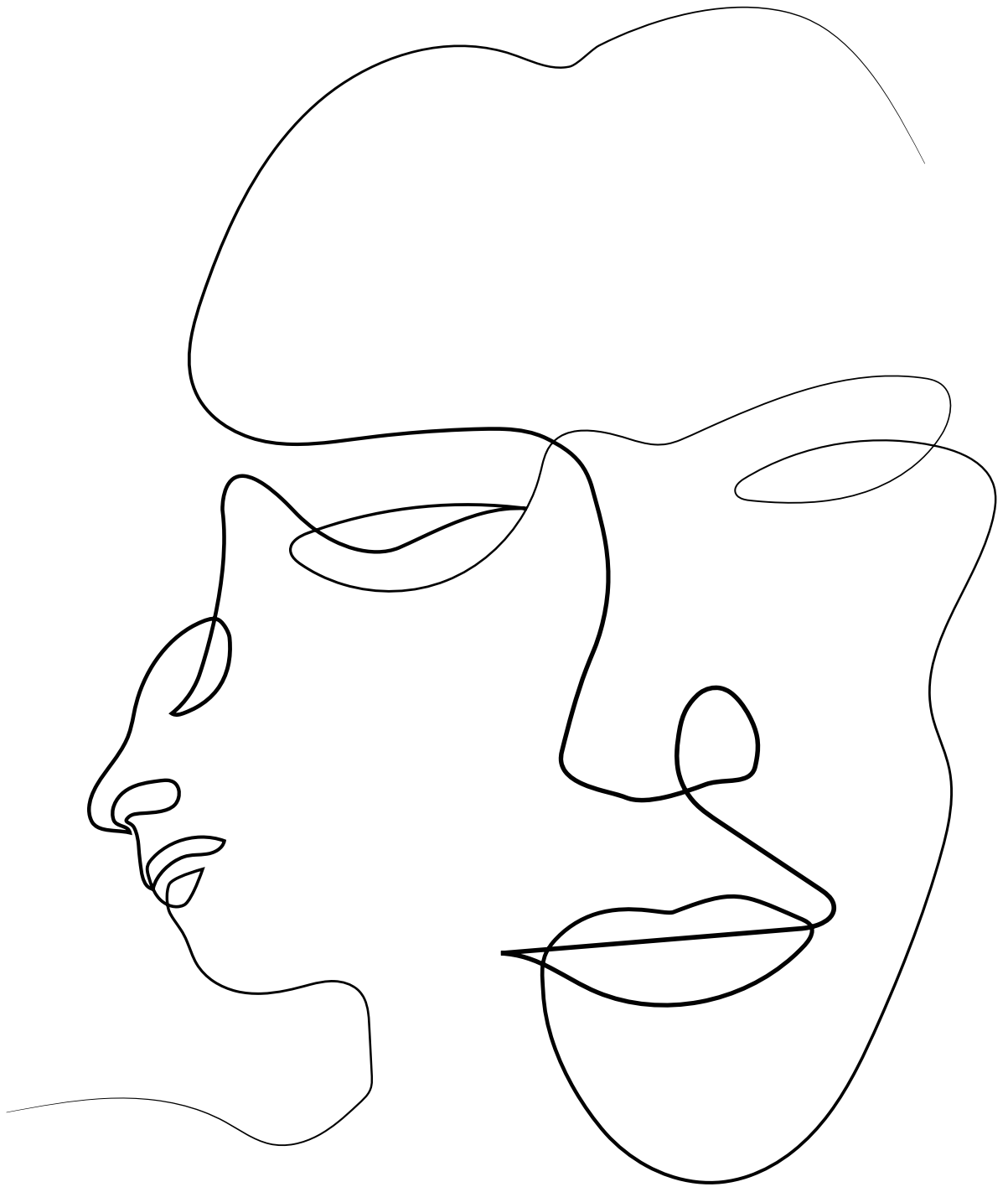
Male Beauty Is No Longer The Domain Of A Niche Avant Garde. It Has Gone Mainstream.

It is our opinion that male beauty will be one of the most exciting growth stories of the coming years. The market presents a perfect storm of pent-up spending power, strong cultural underpinnings and relatively open competitive landscape. It offers tremendous opportunities for both established brands and newcomers alike to get in at the ground floor, help shape customer behaviors and gain a foothold in the market before it consolidates.

Most fascinating about this market is its uncertainty: Which beauty rituals will become fully mainstream? How many men will cross over from skincare to makeup? Which brands will come out ahead? Which purchasing channels

will customers favor? What type of celebrities and ambassadors will they respond to? Which new product formats and ingredients will arise? To what extent are female best practices transposable to the male market? Etc...

Answering these questions means standing at the intersection of culture, product, branding and channel innovation. It is this approach that we adopt in this article, showing how beauty fits into a broader cultural evolution of masculinity, breaking down the new male beauty routine, mapping the male beauty path to purchase and identifying different archetypes of male beauty shoppers.



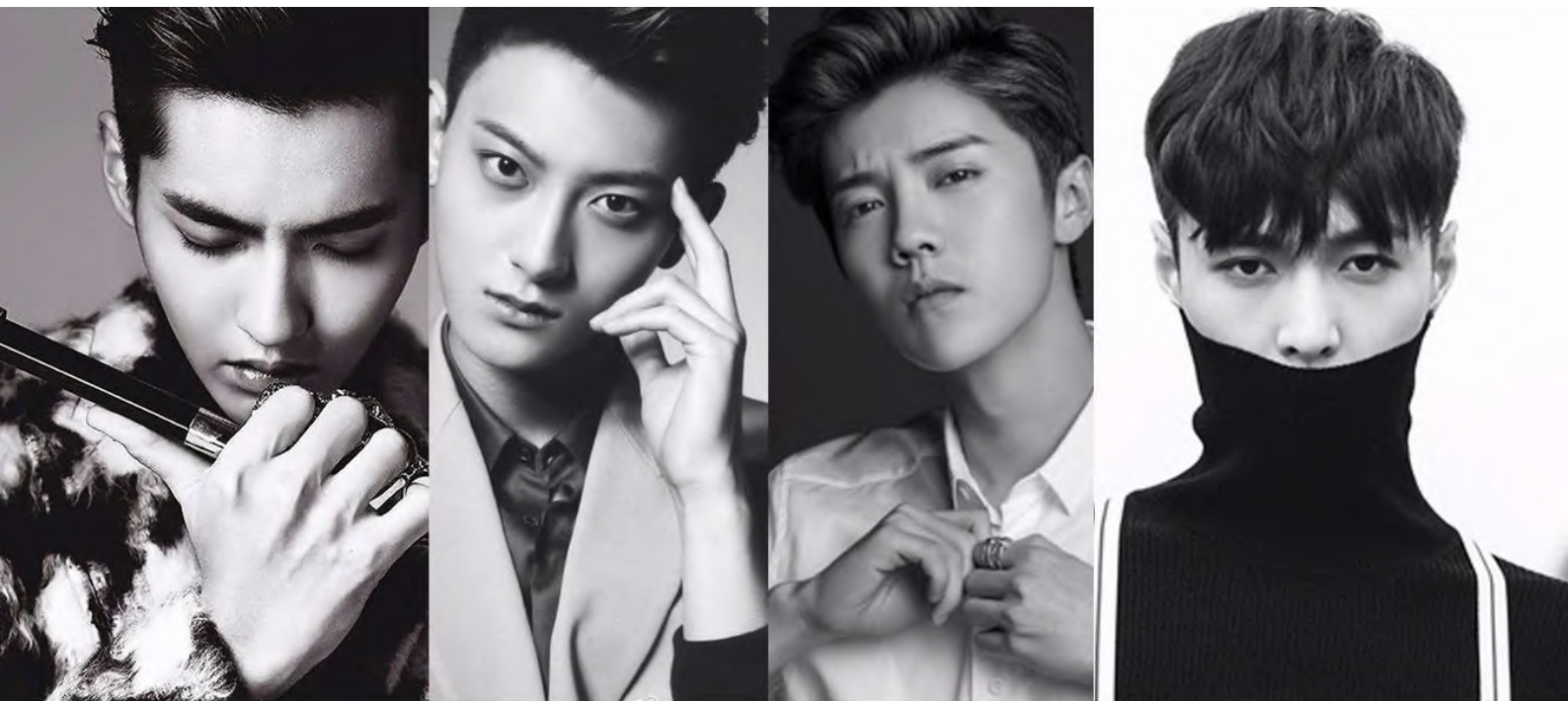
The New Chinese Man

THE FUEL POWERING THE RISE OF THE MALE
BEAUTY AND SKINCARE MARKET

Big growth stories are always built on strong cultural foundations. Major shifts in norms and popular aspirations bring about new behaviors and new spending patterns. This is precisely what is happening at the moment as new definitions of masculinity and new lifestyle habits enter the mainstream and shape a 'new Chinese man' .

This 'new Chinese man' is often embodied in the figure of the 'Little Fresh Meat' (小鲜肉): fashionable, delicate, fresh faced men built on the template set by Korean boys bands. While this image carries some truth, it can also be misleading by reducing a complex cultural trend to a single extreme expression. Not all modern Chinese men aspire to become 'Little Fresh Meats' but most converge on a number of behavioral and cultural trends.

'Little Fresh Meat': Kris Wu, Z.TAO, LU HAN, LAY Zhang. Source: btime.com



BREAKING DOWN THE NEW CHINESE MAN

TRADITIONAL MASCULINITY



Wu Xiubo. Source: Pinterest.com

- Cultural environment shaped by traditional gender roles
- Status comes from economic success
- Men succeed through their hard work
- Low involvement consumer
- Ideal of male appearance: elegant, strong, mature
- Male makeup as a deviant phenomenon

NEW MASCULINITY



Deng Lun. Source: Pinterest.com

- Cultural environment shaped by gender re-definition
- Status comes also from personality and culture
- Men succeed also through their looks and personality
- High involvement consumer
- Ideal of male appearance: soft, clean, youthful
- Male makeup is fully accepted and compatible with masculinity

OI.

Passion for self-improvement

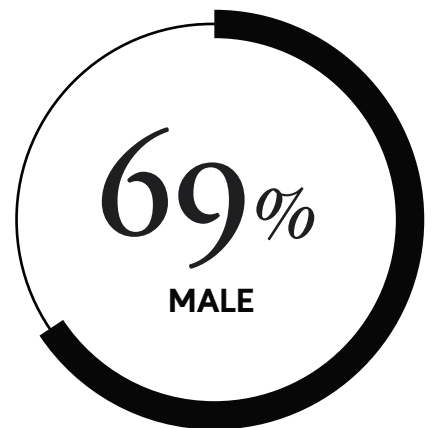
Modern Chinese men are passionate about self-improvement. They dedicate an increasing amount of their free time and discretionary income to the betterment of their minds and body. More than an utilitarian pursuit, self-improvement is a life philosophy, an ethic of self-cultivation and constant progress through good daily life habits.

One dimension of the self-improvement quest is physical. It is projected in the rise of fitness in both traditional gym formats and new formats such as exercises classes, 24h gyms or in-home fitness. In 2018 alone, sales of sports bracelets by men on Tmall increased 122%. This not only reflects the increasing adoption of sport as a daily life habit but also shows that physical self-improvement is closely linked to data tracking and 'body hacking', intersecting with a more traditional male interest in technology.

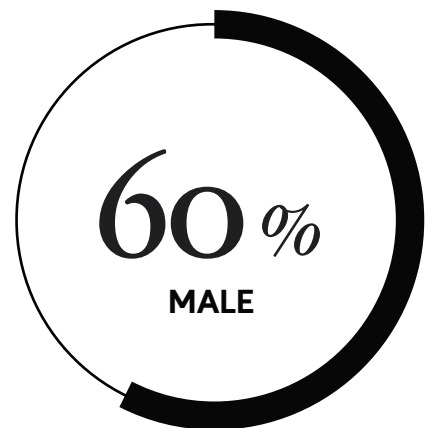
Self-improvement is also intellectual and spiritual. Men represent a majority of the user base of top knowledge apps such as Zhihu (69% male) and De Dao (60% male). Within paid content, the top category by far is 'personal growth' accounting for nearly 50% of content and demonstrating once again modern Chinese men's commitment to on-going skill building and intellectual growth.



Zhi Hu 知乎



De Dao 得到



Men represent a majority of the user base of top knowledge apps

02.

Increased independence and involvement in consumption choices

Meituan CEO Wang Xing once said that the hierarchy of most valuable consumer groups went: young women > children > middle aged women > the elderly > dogs > men. This traditional view reflected the difficulty of getting men involved in premium consumption beyond a limited set of categories like electronics. Put simply: men lacked the sort interests and hobbies that drive spending.

This state of affairs is changing fast. From sports to music, fashion, travel and self-care; men are developing new passions and becoming more involved consumers. A sign of this change is the rise of male focused e-commerce platforms. Du 毒 for instance started as an app offering appraisal services for rare sneakers. It has grown into a comprehensive e-commerce platform with a largely male audience and a GMV of over 10 billion RMB in 2018. Yoho有货 is another beneficiary of this wave of male spending and is posting 100% YOY growth rates. It is northeworthy for including a selection of male skincare products alongside its more traditional sneakers and streetwear categories.

Perhaps the ultimate proof of the power of this new male consumption culture can be found in the efforts by various players to create the 'male RED'. The most ambitious step in this direction has been taken by Zhihu who just pushed a new app called CHAO which bills itself as the go to place for lifestyle tips and product reviews for young trendy men.



Beauty products are making their way into popular male e-commerce platforms such as Yoho. Source: Yoho!Buy app



CHAO: Zhihu's effort to create a male equivalent of RED. Source: CHAO app

03.

Beauty as an asset

95% of young professionals recently surveyed by job search platform BOSS 直聘 agreed that looks had a direct impact on salary. The well-known term of 'Looks economy' (颜值经济) used to apply mainly to women for whom physical appearance has long been accepted as a direct driver of social status and economic success, especially in the social media age with its obsession with visual content.

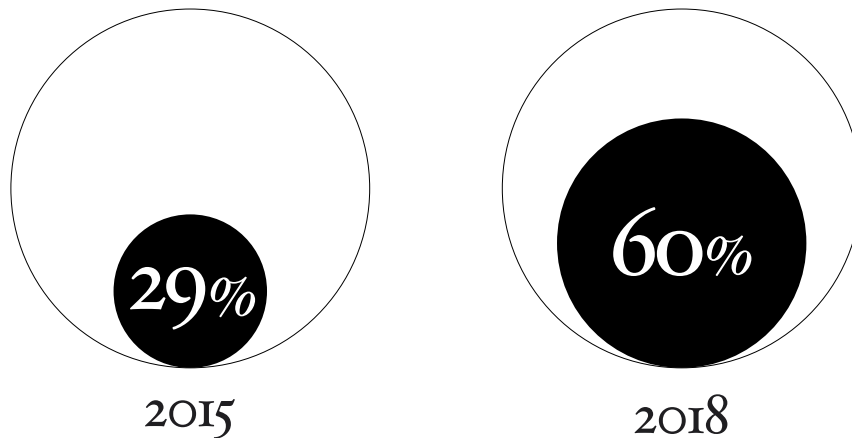
This vision of beauty as an asset is now increasingly embraced by post 90s and post 95 men who invest in their appearance to gain an edge in the

real world. This edge can deliver dividends in the workplace where a good physical appearance complements educational background to create the perfect 'up and coming' white collar worker. It can also apply to relationships where female empowerment makes traditional forms of status projection increasingly irrelevant or at the very least insufficient on their own. Many independent, professionally successful post 90s women expect more than a car and house in a partner. They bring to the dating game increasingly high demands in terms of style, attitude, culture and physical appearance.

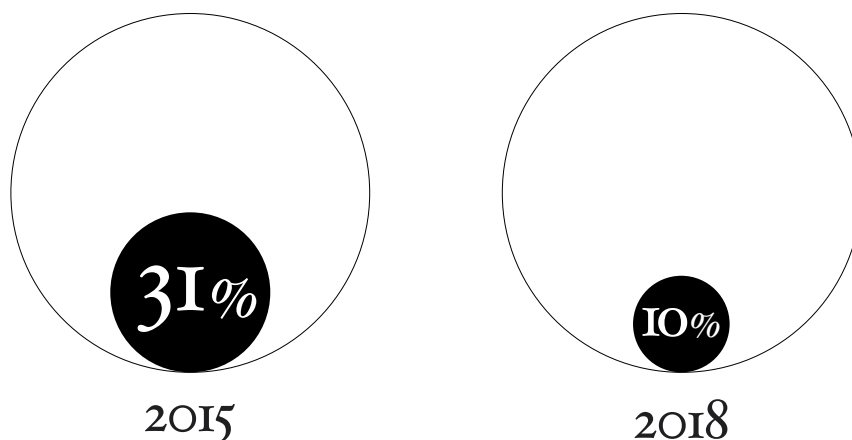
Men Accept That Beauty Is A Key
Driver Of Social And Economic
Success, They Participate In The
'Looks Economy'

A sign of this evolution, many Chinese men are going beyond skincare and accepting the idea of beautification of the male face through makeup. This jump from 'skincare acceptance' to 'beauty acceptance' represents perhaps the most consequential shift in mindset at play. According to Weibo surveys, 31% of users 'Strongly opposed' men using makeup as recently as 2015 with 29% 'Strongly supporting' . Fast forward to 2018 and the share of 'Strongly supporting' has shot up to 60% while 'Strongly opposed' accounts for less than 10% of respondents.

STRONGLY SUPPORT MEN WEARING MAKEUP



STRONGLY OPPOSE MEN WEARING MAKEUP



Source: Zhiwei Data

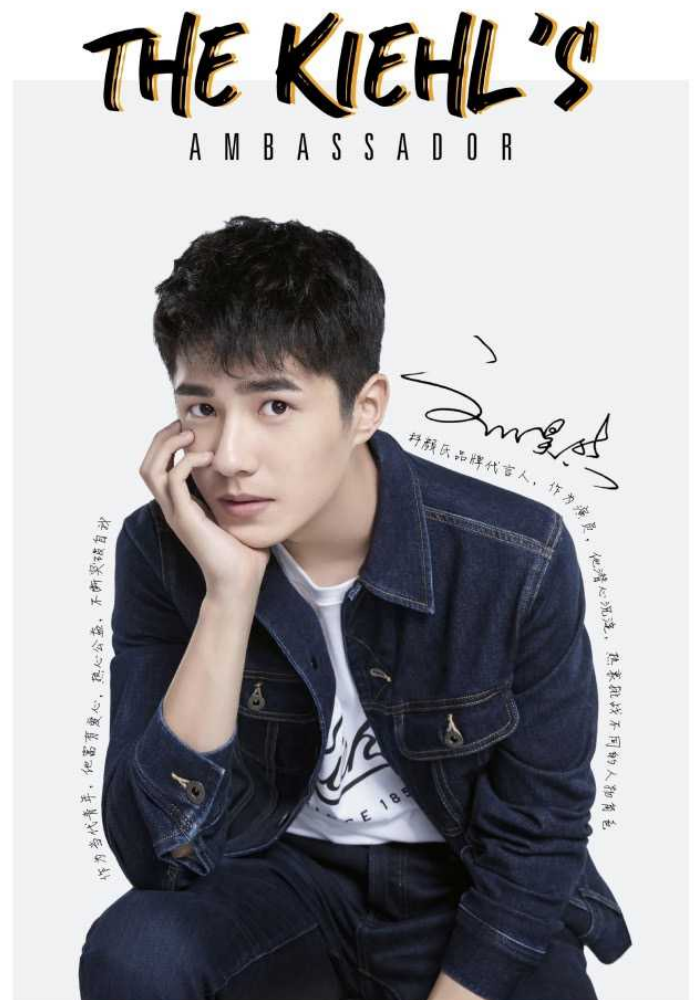
New Masculinity Codes Are Reflected In Brand Creative

FROM

TO

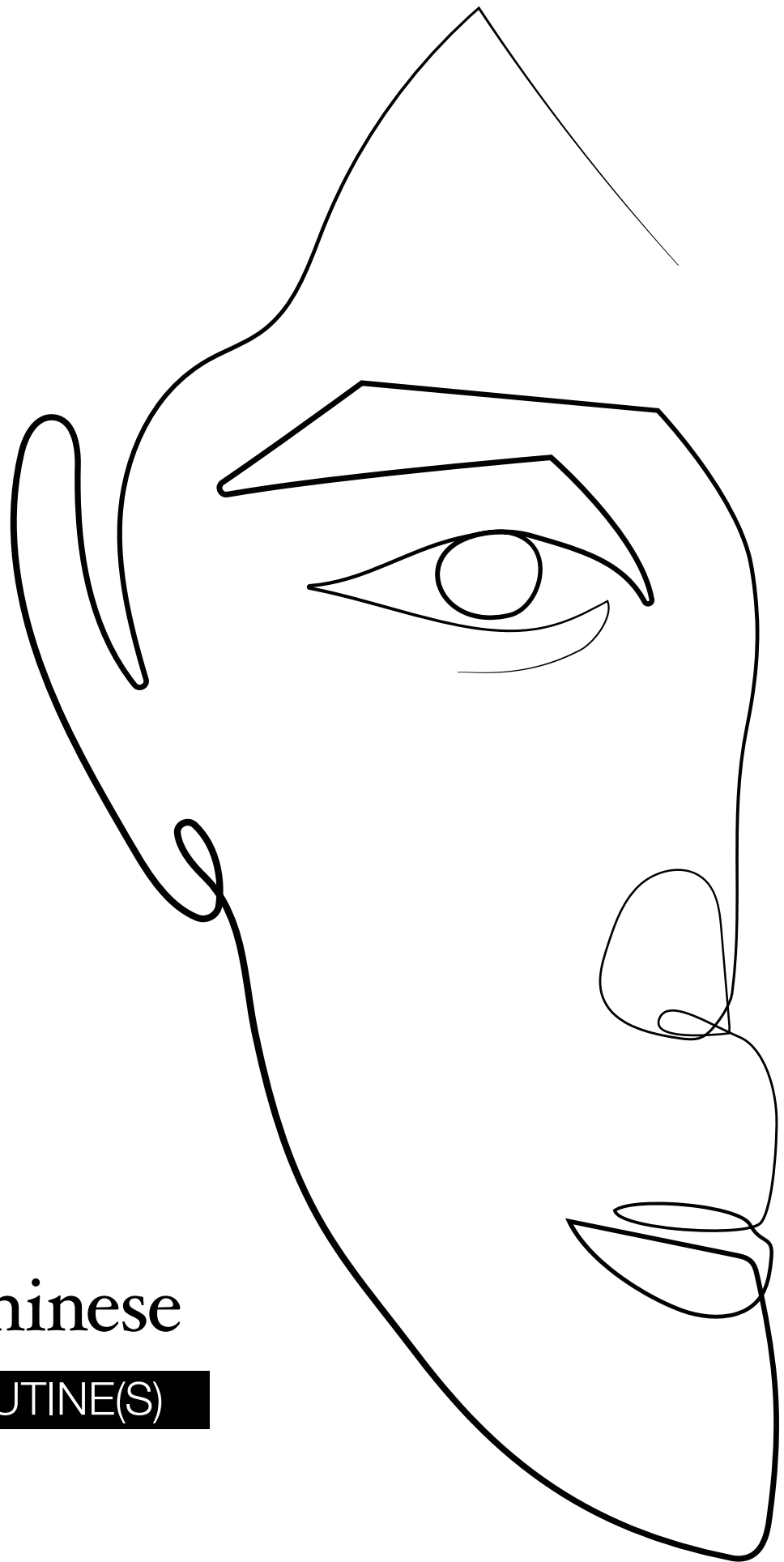


- Raw power
- A god-like model
- Projection of strength



Source: Tmall.com

- Playfulness
- Attitude
- Approachability



The New Chinese

MALE BEAUTY ROUTINE(S)

Male beauty as a whole is growing strongly. But to fully understand the opportunities offered by this trend, one must look beyond the headlines and dig deeper into understanding the new male beauty routines. Which products can be considered mainstream? Which are growing the fastest? How are customers transitioning to new products?

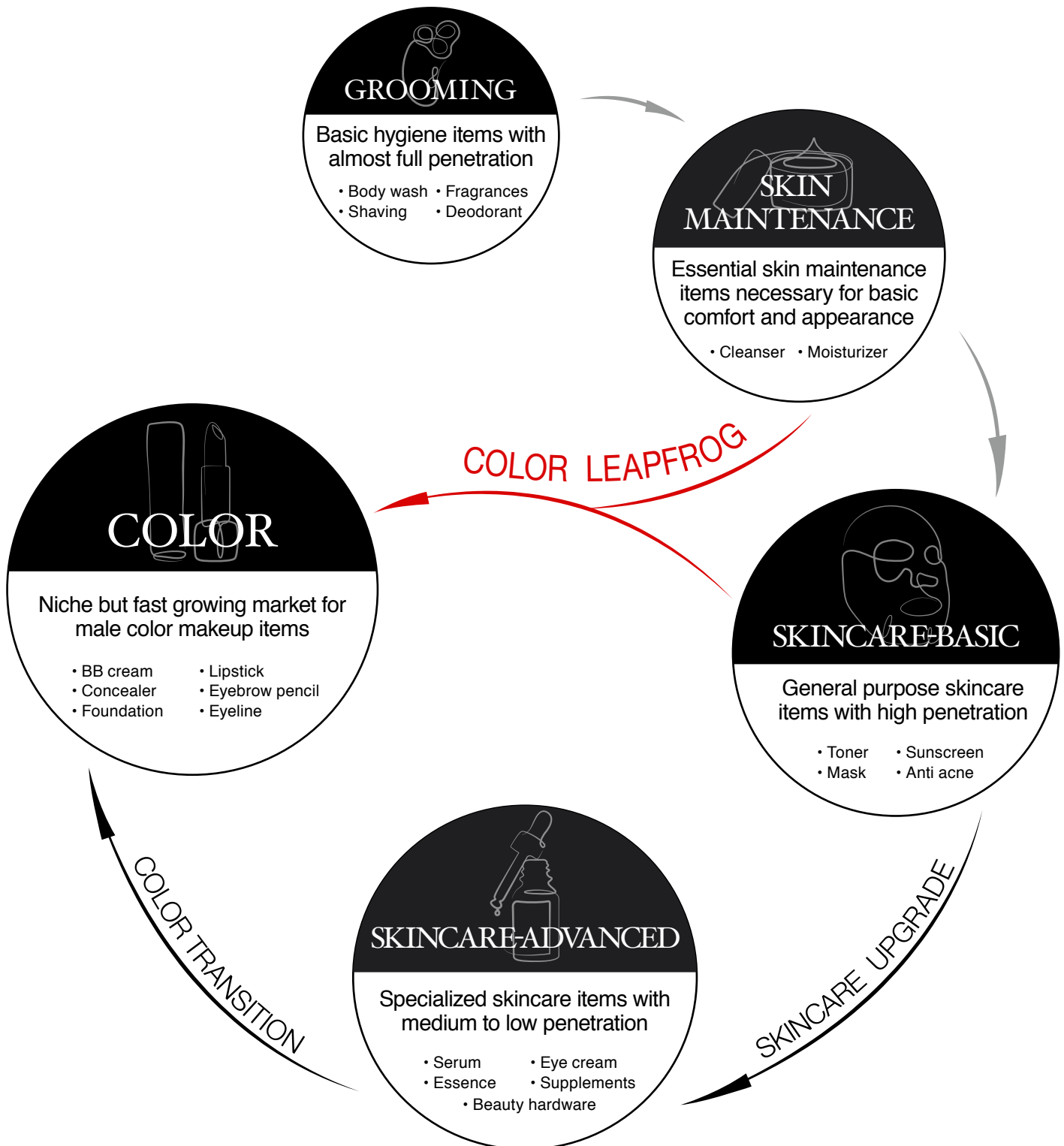
Source: Tmall.com



OI.

From male grooming to male color beauty: Mapping the male 'beauty journey'

Based on our experience, we have divided the male beauty routine into 5 different stages of sophistication each corresponding to different behaviors and products.



Key Male Beauty Growth Categories

249%

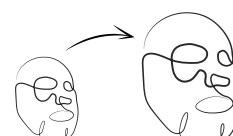
Increase in BB cream purchases during 11/11



Source: Tmall.com

168%

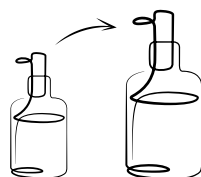
Year on year increase in sales of male face masks



Source: Alimama

126%

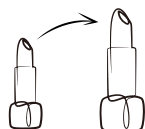
Year on year increase in purchases of serums by males



Source: Tmall.com

278%

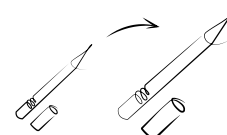
Year on year increase in sales of male lipstick



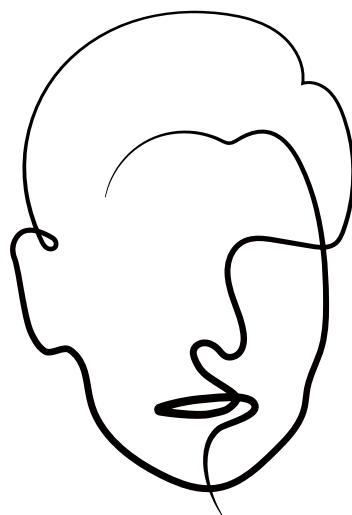
Source: Tmall.com

214%

Year on year increase in sales of eyebrow pencils



Source: Tmall.com



At the start of what can be considered male beauty is what we call skin maintenance categories: moisturizer and cleansers. These products have a long history in the market. They are almost universally accepted and considered 'must haves' for any self-respecting modern man. Mass market early movers like Loreal and Nivea enjoy very high market shares in these categories.

Despite their very high penetration, 'maintenance' categories are still growing strongly thanks mainly to increase in usage frequency and trading up in

brands. Alimama data shows for instance male cleanser sales growing 72% year-on-year in 2018.

The next step up the beauty ladder is what we refer to as basic skincare with items such as toners, masks and sunscreen. These items have a very high penetration, especially with young and premium audiences (85% of men recently surveyed by Tmall and Loreal use at least one skincare product). They are part of the self-care habits of most appearance conscious men although usage frequency might vary from individual to individual.

With 168% Year On Year Growth, Masks Represent The Upgrade Of Male Beauty Routines



Masks are becoming a key part of the male beauty routine. Source: Tmall.com

Within this category, male masks stand out as a breakaway growth item with 168% year on year growth in 2018 according to Alimama data. Sunscreen is also another strong growth product with 114% increase in search interest in 2018 according to 360 (highest of all product categories). Data from Toutiao confirms this with masks and sunscreen ranking as the top 2 most followed product categories by male users during Q1 2019.

From basic skincare, many men move forward towards advanced skincare. We believe that this transition marks an important inflexion point from skincare as a necessity ('because I have to') to skincare as a key lifestyle pursuit ('because I want to'). Within advanced skincare we find products with sophisticated formulations and a more targeted effect such as eye creams, serums and essences. These products are often linked to anti-aging or counterbalancing the effects of busy lifestyles with frequent overtime work. We can also fit in this group emerging categories such as beauty hardware or skincare supplements.

Male face creams as a whole grew 101% year on year in 2018 while purchases of

serums by men has increased 126% during the same year. An interesting element to note is the propensity for men to buy advanced products such as serums from female brands. While sales of serums by men have risen by 126% in 2018, sales of serums by men from male specific brands has risen only 26%. While gifting can account for some of the delta, there is without a doubt a strong 'hidden market' of men using female serums. SKII for instance is well known for being favored by many male users.

Finally, at the far end of the spectrum, many (though not all) men are enthusiastically making the jump from skincare to color makeup. On Tmall, male color cosmetics are growing 89% year on year, faster than fragrances, hair care, body care and face care. Men typically enter this universe through BB creams and concealers, products that often advertise themselves as 'invisible' and meant to correct small blemishes while maintaining natural skin color, like a 'cheat code' for your skin. The result: sales of BB cream and concealer have risen respectively 249% and 192% during double 11 2018 compared to 2017.

Even more remarkable is the rise of lipstick and eyebrow pencils which have grown respectively 278% and 214% on Tmall in 2018. These products show that men are moving from a pure focus on skin to a ‘full face beauty’ approach.

As impressive as these growth figures are however, we must keep in mind that male color cosmetics is still a nascent market with relatively low penetration. Sustained efforts from brands on marketing and product are still needed to make the category go mainstream (see below for more perspectives on this topic). We do notice however a significant uptick in adoption with post 95 and 2000 consumers. iResearch data for instance suggests that 1 in 5 post 95 consumers uses BB cream and eyeliner.



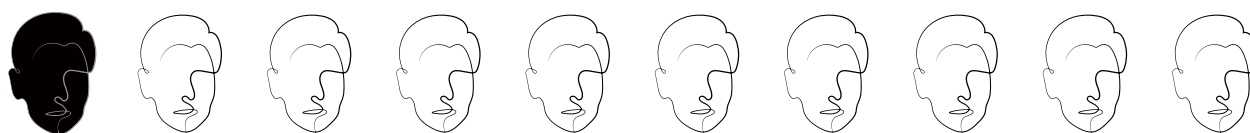
1 IN 5 POST 95 CONSUMERS USES BB CREAM



1 IN 5 POST 95 CONSUMERS USES EYELINER



1 IN 10 POST 95 CONSUMERS USES EYEBROW PENCILS



Source: iResearch

02.

3 opportunity spaces for upgrade

If we consider the market as a whole, most middle class consumers would find themselves in the 'maintenance' or 'basic skincare' stages of their beauty journey. For brands, we see 3 major opportunities for consumption upgrade:

Skincare upgrade: customers who start out with basic skincare items gradually learn about the category, find their preferred brands and develop a finer understanding of their skincare needs. They are likely to start upgrading basic items while adding new steps to their routine with products such as serums, eye cream or even supplements.

Color transition: sophisticated skincare users gradually become more comfortable with the idea of color makeup. They see it as the natural next step in their pursuit of more beautiful skin and start experimenting with simple solutions such

as BB creams before gradually adding more 'advanced' categories like eyeliners or lipstick. It should be noted though that the transition to color makeup represents an important step and shift in mindset. A significant contingent of customers, especially in post 80s generations, are likely to never fully move beyond skincare and into color makeup.

Color leapfrog: it would be tempting to see color makeup as the sole domain of an elite of highly educated customers who have already adopted a sophisticated skincare routine. Reality though shows that many brands, especially new Chinese brands, are targeting post 95 and 2000 customers, trying to get them to leapfrog straight to color makeup. This trend is for us the most interesting opportunity space for new brands who have the chance to shape the habits of a new generation of 'beauty native' consumers.

Source: Tmall.com



Many Young Consumers Are 'Leapfrogging' Straight To Color Makeup



男士修颜气垫BB霜

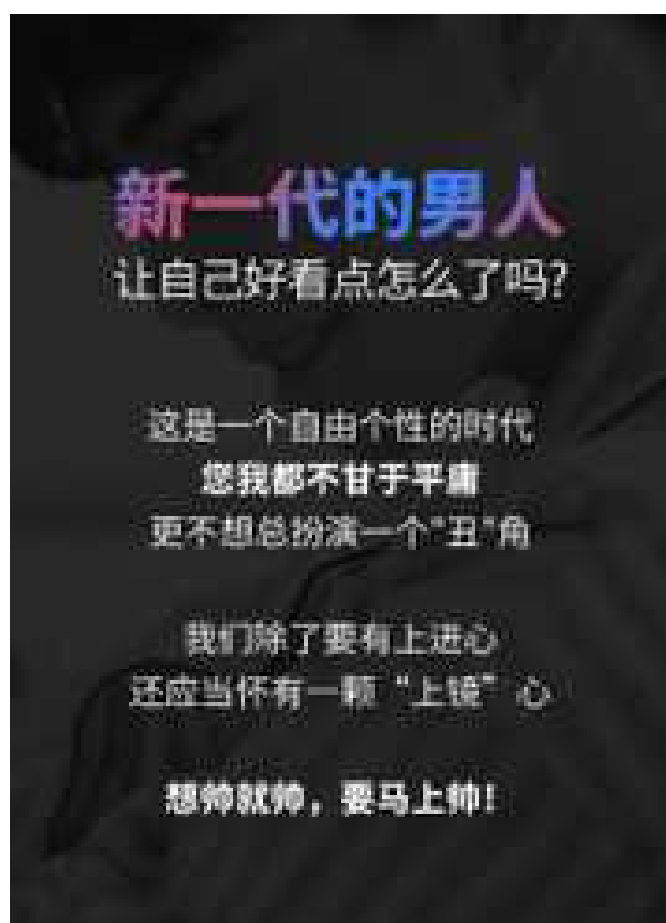
轻松上妆
拒绝麻烦

- 提亮
- 隔离
- 修饰
- 遮瑕
- 保湿
- 不油腻

陈龙

赫恩 男士

赫恩代言人:陈龙



新一代的男人
让自己好看点怎么了吗?

这是一个自由个性的时代
您我都不甘于平庸
更不想总扮演一个“丑”角

我们除了要有上进心
还应当怀有一颗“上镜”心

想帅就帅，要马上帅!

HE 赫恩 calls on the new generation of men to gain an edge in life through better skin. Source: Tmall.com

How To Win:

REACHING AND SEDUCING

THE NEW CHINESE

MALE BEAUTY BUYER



It is clear that the male beauty routine is becoming more complex, opening up considerable opportunities for both short term sales growth and long-term brand building. But how should brands go about winning in this market? How can they bring together communication, products and channels to reach and convert the new Chinese male beauty buyer? While there is no set, guaranteed formula for success; we have identified 4 key principles that we believe brands in this space should follow.

Source: Tmall.com



OI.

Leverage the influence of women as educators and influencers

While men are becoming more involved in their beauty routine, it is an undeniable fact that they remain heavily influenced by the women around them.

Women, be them wives, girlfriends or friends, act as purchase trigger, choice influencer and often times are also the buyers of male beauty products. Data from Alimama suggests that as much as 55% of male face creams and 70% of male masks are bought by women.

As a 'low hanging fruit', male oriented brands should run targeted activities geared towards making allies of women. One example is Martin 马丁, a direct to consumer male skincare brand that ranks in the top 5 male cosmetics brands on Tmall. While Martin generates the bulk of its sales on JD.com and Tmall, it also uses female-dominated RED 小红书 to reach young women with gifting oriented campaigns.

Also on RED, Korean premium skincare brand Sulwhasoo goes as far as changing the names of certain products to encourage women to purchase for the men in their lives. Its signature cleanser for instance, called simply 'Fresh face wash' 清爽洗面乳 on Tmall, takes on the new nickname of 'dad and husband love to wash their face' 老爸老公爱上洗脸 on RED. Loreal also plays the game of playful nicknames with its 'Giving you back a fresh boyfriend' 还你一个清爽男票 set.



'Giving you back a fresh boyfriend' set by Loreal. Source: Taobao.com



Sulwhasoo 'Dad and husband love to wash their face' cleanser. Source: Taobao.com

02.

Adopt an 'online native' mindset

Compared to women, men lack a history of buying cosmetics offline. They do not have the same need to be directly exposed to the products, smell them, feel their texture and do a test application. For most of them, beauty remains a relatively low involvement category in which the most prized brand attribute is convenience. This opens up a space for new online native brands.

A look at top selling cosmetics brands on Tmall reveals many familiar names like L'Oréal, Shiseido UNO and Nivea. But alongside these brands (and frequently out-selling them) are a new group of brands such as Martin 马丁, Man Codes 左颜右色 or HE 赫恩. These represent a new generation of recently created male



Martin represents a new generation of direct to consumer male beauty brands. Source: Taobao.com

beauty brands built around mastery of e-commerce channels, agile digital communication, social community engagement and high value for money. Because of their main growth channels, these brands are often dubbed 'Tao Brands' 淘品牌 and 'Bo brands' 播品牌.

The example of Martin 马丁 is very telling. Launched in late 2017, Martin has become one of the top performing brands in its category on both Tmall and JD.com where it has respectively 200,000 and 220,000 followers. Replicating best practices from other direct to consumer brands, Martin extends the same signature ingredient (cologne) across a wide range of affordable products from shampoo to masks, sunscreen, serums and even intimate grooming. Through simplicity and consistency, it provides a 'one stop' solution to all skin-care needs. To facilitate discovery and maximize repeat purchase, it extends its presence across a social and e-commerce eco-system that includes Tmall, JD.com, RED and a Wechat mini program.

Through the case of Martin 马丁 we also note the importance of JD.com to convert male audiences. While its position in female skincare lags far behind Tmall, JD.com's predominantly male user base put it in a strong position to benefit from the male beauty boom and it should be seen as a top priority channel for any brand in this market.

New Digital Native Local Brands Are Disrupting Incumbents Through Their Mastery Of Digital Channels

Another example of digital powered growth can be found in Man Codes 左颜右色. Founded in 2012, Man Codes sells over 75,000 units of its star BB cream every month and owes a large part of its success to its mastery of online short video. It has over 1 million likes on Douyin and 22,000 followers on micro video app Kuaishou. Highly active on both video

platforms, Man Codes' content borrows more from slapstick comedy and 'Stupid culture' 沙雕文化 than from traditional skincare codes. The brand worked in particular with influencer Xu Huasheng on a series of humorous videos promoting the volcano mud cleanser set. All its content re-directs to its Tmall storefront to drive direct conversion.

Man Codes' Kuaishou content borrows heavily from 'Stupid Culture' 沙雕文化 codes.
Source: Kuaishou app



Man Codes drives direct conversion from its videos through its Kuaishou shop
Source: Kuaishou app





E-sports and regular sports: GF brings together new and traditional male skincare codes. Source: Tmall.com

03.

Explore new cultural territories to influence male beauty buyers

From choice of ambassadors to content production, the rise of male beauty is forcing many brands to re-visit their traditional marketing playbook. While more and more men pay attention to their appearance and to their skin, their sophistication as a whole remains limited and most men still enter beauty through other cultural territories. The challenge for brands becomes to insert themselves in these cultural territories through the right content and collaborations.

One traditional territory that beauty brands

have long used to reach male customers is sports. Athletes such as Beckham or Cristiano Ronaldo were early pioneers in partnering with beauty brands. While not new, the 'sports card' is still highly effective to build cultural relevancy with male beauty buyers. Biotherm collaborates closely with prominent players of the Chinese basketball team and included basketball related experiences in its latest pop-up stores. Earlier in 2019, Mentholatum signed up NBA superstar Jeremy Lin while GF features track runner Xie Zhenye in its most recent communication assets.

While sports remains a reliable avenue to reach male customers, we believe that brands should be more ambitious in exploring new, emerging cultural territories. Chief amongst these is online gaming which has gone in a few years from low-end occupation to trendy lifestyle hobby. Nivea, LAB and Biotherm have all recently struck partnerships with pro-gaming teams or top players. Biotherm has been particularly active on the gaming front, sponsoring Honor Of Kings games and holding live streams with its pro

gamer ambassadors. Its recent communication is replete with gaming references, presenting Biotherm products as ‘weapons’ for ‘leveling up’ the skin. LAB content feature similar language: its new toner, endorsed by the IG Team (one of China’s top pro gaming organizations), ‘Supports’ the skin and ‘Ganks’ impurities. Beyond borrowing slang, we believe that gaming offers tremendous opportunities for highly disruptive forms of commerce and communication through in-depth IP collaboration and in-game advertising.



LAB x IG team collaboration. Source: Tmall.com



Product descriptions borrow heavily from gaming slang. Source: Tmall.com



Biotherm puts gaming at the center of its latest brand campaigns. Source: Weibo.com

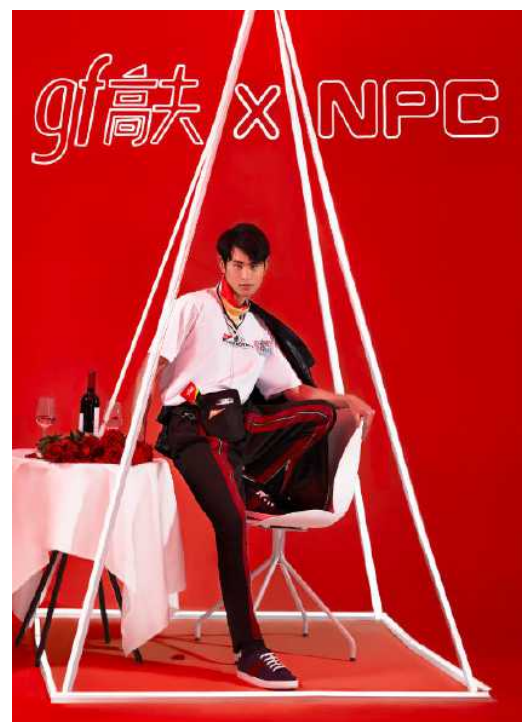




Online Gaming Is The New Battle Ground For Many Male Beauty Brands

Still other brands introduce beauty offerings through the angles of fashion and street culture. As shown by the aforementioned examples of Du 毒 and Yoho 有货, street wear has been a key category in driving the development of a male consumer culture and beauty brands who manage to insert themselves in this space stand to win big. GF for instance recently partnered up with hot fashion brand New Project Center on a pop-up event around the concept of 'total makeover'. The event combined fashion and skincare, calling out for men to comprehensively upgrade their appearance.

Moving forward, we expect brands to be ever more inventive in collaborating with the gate-keepers of male traffic be them celebrities, other brands, digital platforms or IP properties.



GF and NPC bring together skincare and fashion for a total male makeover. Source: Weibo.com

04.

Educate on products benefits to trigger purchase

One of the key challenges in developing the male beauty market lies in the need for education. Most men remain relative newcomers to the world of beauty and skin-care. Unlocking the full potential of the market requires brands to educate audiences on products, routines and benefits. Very often, their job is to sell not just their specific product but the category as a whole. By reviewing the content of different brands, we have identified 3 key messaging angles that have proven effectiveness in convincing male customers of the importance of upgrading their beauty spending.

Female validation: as mentioned earlier, beauty is for men an important way to gain an edge in an increasingly competitive dating market where women set high demands in terms of style and appearance. It is thus un-surprising that seduction is a key point of focus for many brands

trying to get across their benefit in a simple, relatable way. Many communication pieces stress women's expectations for a well put together man and the need for men to live up to these expectations. While men used to be shamed for being un-successful, they are now also shamed for being negligent with their appearance. Much of this content is voluntarily over the top, borrowing from internet meme culture to get the message across humorously. Man Codes 左颜右色 in particular embraces this crude and simple 简单粗暴 approach with its micro videos showing how a potential romantic encounter can be ruined by bad skin.

In many ways, the enduring presence of such messages shows how important female expectations are in driving male skincare adoption and how consumption behaviors connect to much broader cultural and social trends.



Man Codes' Kuaishou content shows in no subtle terms the difference between good and bad skin when it comes to seduction.
Source: Kuaishou app

皮肤问题 陷入窘境



面试

熬夜熊猫眼，面试秒被×



约会

满脸痘痘印，约会惨被拒



聚会

密集大毛孔，聚会遭嫌弃

Loreal's BB cream allows men to be their best in key situations. Source: Tmall.com

Performance and confidence: the traditional representation of male lifestyles is one in which men are expected to perform both at work and in social situations. It is no surprise then that beauty brands would frame the benefits of their products in performance related terms. Skincare becomes a tool for men to gain an edge in important moments.

Biotherm in its recent communication uses gaming analogies to connect to the male competitive spirit, calling on men to 'turn on their high-energy mode' with Biotherm solutions. Many other brands directly connect these benefits to concrete occasions amongst which the most important are overtime work, sports and business travel.

This dominance of short-term, occasion driven benefits messaging contrasts with the 'long term skincare management' approach that is more common in the female beauty space.

Convenience: like most clichés, 'men are lazy' contains a kernel of truth. As we mentioned earlier, many men recognize the need to take better care of themselves but remain put-off by the necessary time investment. They expect solutions that offer immediately visible results while at the same time not disrupting their daily habits. Many brands address this issue head on by emphasizing the convenience of their skincare solutions and their seamless integration into busy male lifestyles.

The example of BB cream is perhaps the most interesting. A majority of brands in this space present their BB cream as a miracle combination of a hydrating, cleansing and beautifying solution. They demonstrate how BB cream can allow men to cut down on the time and energy they spend on skincare. Man Codes 左颜右色 goes as far as claiming that its BB cream offers customers '30 extra minutes of sleep' by reducing a complex skincare routine down to a single all-purpose product.



Martin allows the well-groomed man to stand out from the crowd and get noticed at work. Source: Weibo.com



MORE SLEEP

让你每天多睡半小时



不用早起
30秒提亮



不用卸妆
植物养肤



早晚呵护
水光透亮

FROM HAIR ROOT TO HAIR TIP

Man Codes' promise: 30 extra minutes of sleep through a simpler beauty routine. Source: Taobao.com

花式贴膜说明书

教你一言不合就贴膜



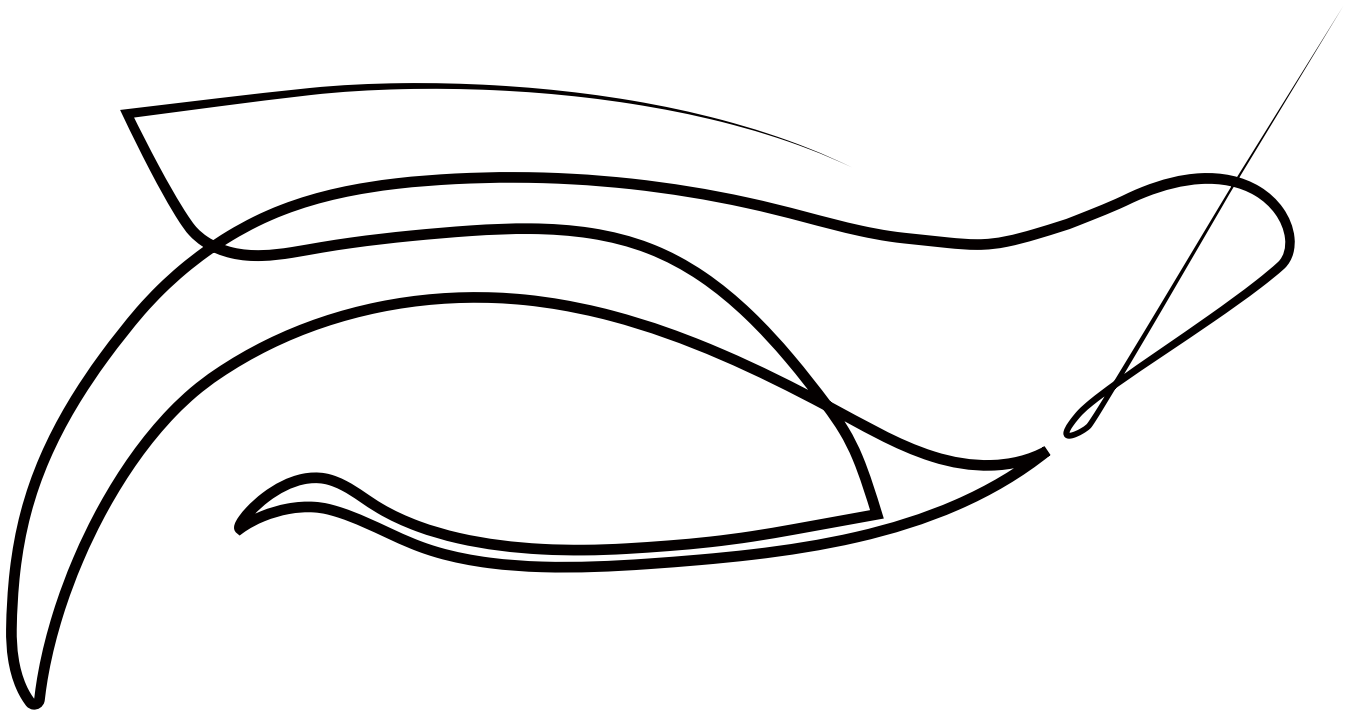
With Loreal, apply your mask like a man.
Source: Taobao.com

Major brands such as Loreal also play the convenience card to lure male buyers. The Loreal male face mask product page revolves almost entirely about the product's convenience: the packaging can be torn apart without damaging the mask, the mask is sturdy enough to prevent ripping, its large size is engineered for men's faces, it can be worn while exercising and only 5 minutes are necessary for it to delivery its effects.

How To Win:

MAKING COLOR BEAUTY

MAINSTREAM



While reducing the male beauty opportunity to color makeup would be a mistake, it is undeniable that it is the category that offers not only the highest growth rates but also the biggest opportunities for innovation both for incumbent brands and new entrants.

Source: Tmall.com

MAKE-UP

BEGINNER BB CREAM

NEW STYLE



During its early development, male color beauty was driven by highly sophisticated customers with an advanced skincare routine who dared to make the jump into makeup, often through female products. These early adopters were glamorous, stylish and bold. The future of male color cosmetics however will not look like its past. Growth will come not exclusively from the avant-garde but by making makeup acceptable, useful and desirable to new customer groups. Only time can tell how different brands will tackle this challenge. From our perspective, we see 3 high-potential avenues to making color makeup part of every man's routine:

Natural beauty trumps glamour: one key to achieving mainstream acceptance lies on how brands frame category benefits.

Female makeup intersects strongly with fashion. It connects with consumers' individual style and offers the possibility to play with colors to create different looks. While this vision may become accepted by men with time, it is still a step too far for most male beauty buyers. Rather than appearance alteration, male makeup should be promoted as invisible, highlighting natural features and subtly improving overall appearance without being noticeable. Focus should be not on style or glamour but on promoting a clean, natural and healthy looking face. We even see some brands going the extra mile in assuaging consumer fears by directly comparing their products to female equivalents so as to clearly highlight the differences between them.



Local brand Solehe 和风雨 advertises its male lipsticks as discreet and different from female lipsticks, assuaging consumer fears about looking too heavily made up. Source: Taobao.com

NO SENSE OF PARTICLES

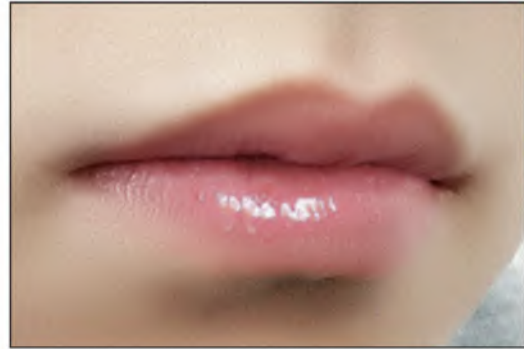
无颗粒感

一抹细腻可见，无粉末感，不会像女士口红那么尴尬。

A TOUCH OF DELICACY, NO POWDER, NOT AS AWKWARD AS
A WOMAN'S LIPSTICK.



LADY



MAN

Source: Taobao.com

Makeup as a practical tool for advancement in the workplace: adoption of male makeup also goes through clearly communicated use cases that connect to male concerns and can form the basis of long-term habits. Korea is worth considering as a reference in this respect. Known for being the earliest adopters of color cosmetics, Korean men are driven in large part by utilitarian, work related concerns. In a highly competitive job market, looks are an integral part of the young professional's arsenal and assist men in moving up the corporate ladder. As we already hinted earlier in this report, the influence of looks on earnings is already well recognized in China and we foresee big potential for brands who can make themselves the workplace companions of ambitious young male professionals. This approach

impacts not only brand messaging but also product formats, placing a higher emphasis on portability and ease of use outside the home.

Innovating formats to make products desirable: many men shy away from color cosmetics because they are intimidated by the products in and of themselves. It is our opinion that format is one of the most important factors in turning male interest into initial transaction and repeat usage. Early on in the purchasing journey, the right format encourages discovery, establishes the product as male-specific and elicits desire through the appeal of novelty and the attractiveness of the form factor. After purchase, format supports habit formation by making products easy to use for beauty newcomers.

Format also encourages frequent usage especially outside the home by turning products into accessories and making male makeup look acceptable in public settings. Brands should be bold in experimenting with different packaging design and product form factors to better cater to male aesthetic sensitivities and usage habits.



Korean brand MIP bring an ultra-masculine, industrial design aesthetic to male makeup
Source: Taobao.com



RD Men 锐度's eyebrow pencil comes in a fashionable, masculine box.
Source: Taobao.com



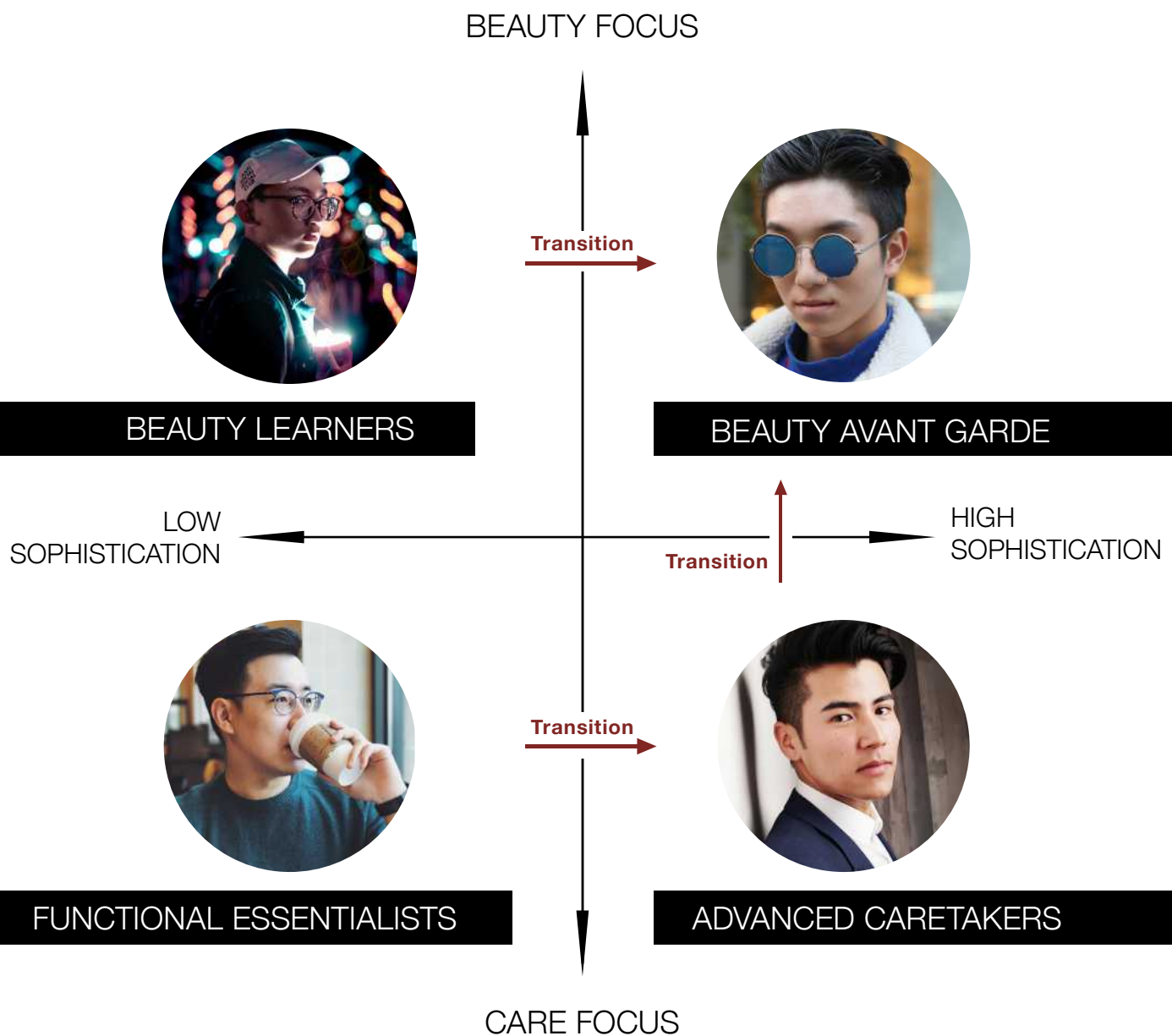
How To Win:

CATERING TO THE RIGHT

MALE BEAUTY BUYER ARCHETYPE

We've seen key trends in adoption of different beauty products along with best practices in engaging with male beauty buyers. What clearly comes out of this analysis is that male beauty is not a monolith but a multi-faceted phenomenon with different consumers groups exhibiting different needs and behaviors. To succeed in this space, brands must be clear which male beauty consumer they are targeting and what their objective is.

Based on our own experience and by recouping multiple 3rd party data sets, we have established a typology of male beauty customers classified based on their approach to skincare and sophistication.



Functional Essentialists

PROFILE

- Understand the need to take care of their skin, feel social pressure to do so
- Very pragmatic concerns: please girlfriend, look good for clients, avoid embarrassment...
- Unwilling to spend time shopping for or using skincare. Seek simplicity and are willing to pay for it
- Least likely to spontaneously look for skincare products or content. Will access skincare through other areas of interest (sports, video games...)
- Likely to stay loyal to the same brand as long as re-purchase is easy, likely to stick with what is familiar
- Key products: cleanser, moisturizer, basic masks



Source: Unsplash.com

CONCERNS

- How can I make sure that my skin serves me well in key situations like dates or job interviews?
- What should I buy? How can I make I pick the right products?
- What brand and products can take care of basic concerns in the fastest, most efficient way?

APPROACH & OPPORTUNITIES

- Create easy skincare routines with clear benefits for different occasions
- Propose 'all in one' solutions through sets
- Drive repeat purchase through loyalty engagement and subscription models
- Gradually start education on skincare best practices to encourage more involvement in the category



Source: Unsplash.com

Advanced Caretakers

PROFILE

- Existing users of premium and luxury skincare
- Have a sophisticated beauty routine including products such as specialty masks, serums, eye cream...
- Involved skincare consumers, willing to spend time learning about products
- Care greatly about ingredients, formulation and texture
- Can use female products for certain categories if they do not find the right male option

CONCERNS

- How can I improve my skin's health and appearance along very specific criteria (Ex: whitening, eye pockets)?
- How do I make sure I'm getting the best in ingredients and formulation, on par with the best female products but engineered for male skin?
- How can I add new steps to my beauty routine to further improve my appearance?
- How can I get a skincare regimen specifically adapted for my skin and lifestyle?

APPROACH & OPPORTUNITIES

- Create new premium products bringing the latest in skincare science for male skin
- Maximize spending by introducing new skincare products such as supplements or hardware
- Develop customization options
- Connect to offline service centers to create advanced male beauty 'macro brands'

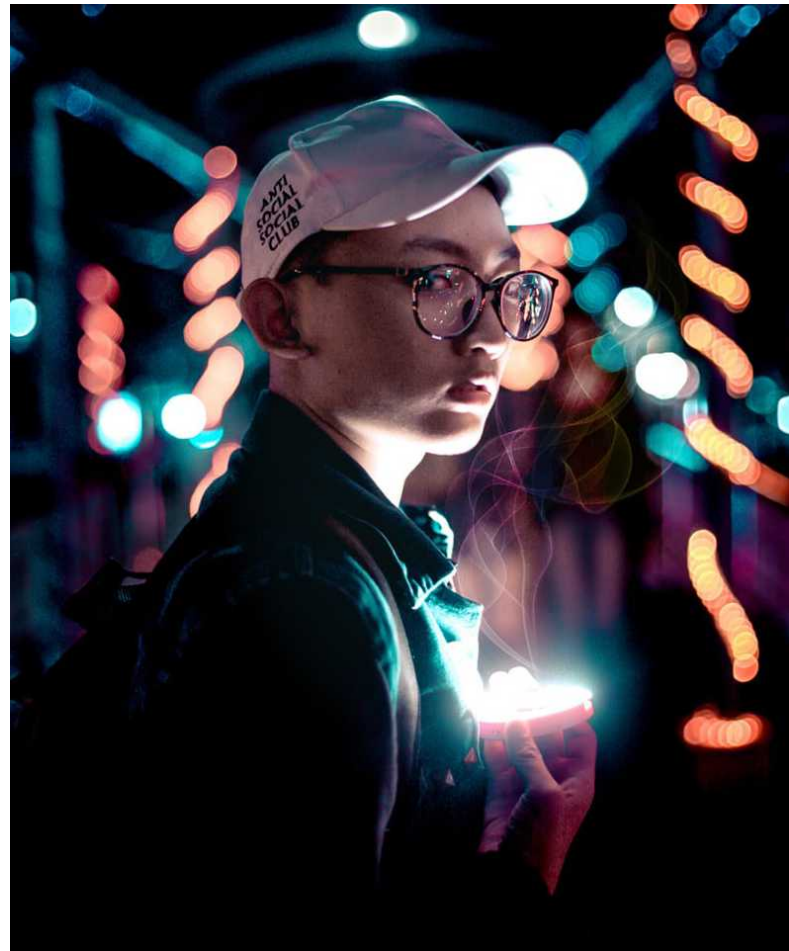
Beauty Learners

PROFILE

- Fashion forward men who already take great care of their appearance mainly through apparel and accessories
- Open to the idea of beautification, use basic skincare and entry level color makeup such as BB cream
- Eager to learn more about male beauty but are confronted to the relative lack of content on the topic
- May still feel reservations about more advanced color cosmetics products such as eyeliner or lipstick, need to be guided and reassured

CONCERNS

- How can I find male beauty products that are good quality but still easy to use?
- Which forms of male beauty are acceptable? Which are right for me?
- How can I be beautiful but remain masculine?
- How can I educate myself about beauty tips and tricks to look better everyday?



Source: Unsplash.com

APPROACH & OPPORTUNITIES

- Educate beauty curious men on everyday beauty tips through accessible educational content
- Propose easy to use entry level color beauty products that make it easy for men to start experimenting



Source: baidu.com

Beauty Avant Garde

PROFILE

- Earliest adopters of male makeup
- Highly involved in the category, spend a large part of their discretionary spending on skincare and beauty. Buy premium brands for both
- Combine a sophisticated skincare and makeup routine
- Buy a mix of male and female brands
- Path to purchase and influences are very similar to female beauty customers

CONCERNS

- How can I find the very best beauty products for men?
- How can I play with different colors to change my look?
- How can I stand out through my exquisite appearance?

APPROACH & OPPORTUNITIES

- Launch premium and luxury male beauty and makeup brands
- Evolve male color makeup beyond basic products and offer more color and shade options
- Create advanced male specific beauty content
- This audience represents a big opportunity for established female brands who can extend successful franchises to male products

As we see, there are many dimensions to the 'male beauty' phenomenon. Not all men have the same starting point in terms of beauty routine and mindset. Not all men will share the same beauty journey.

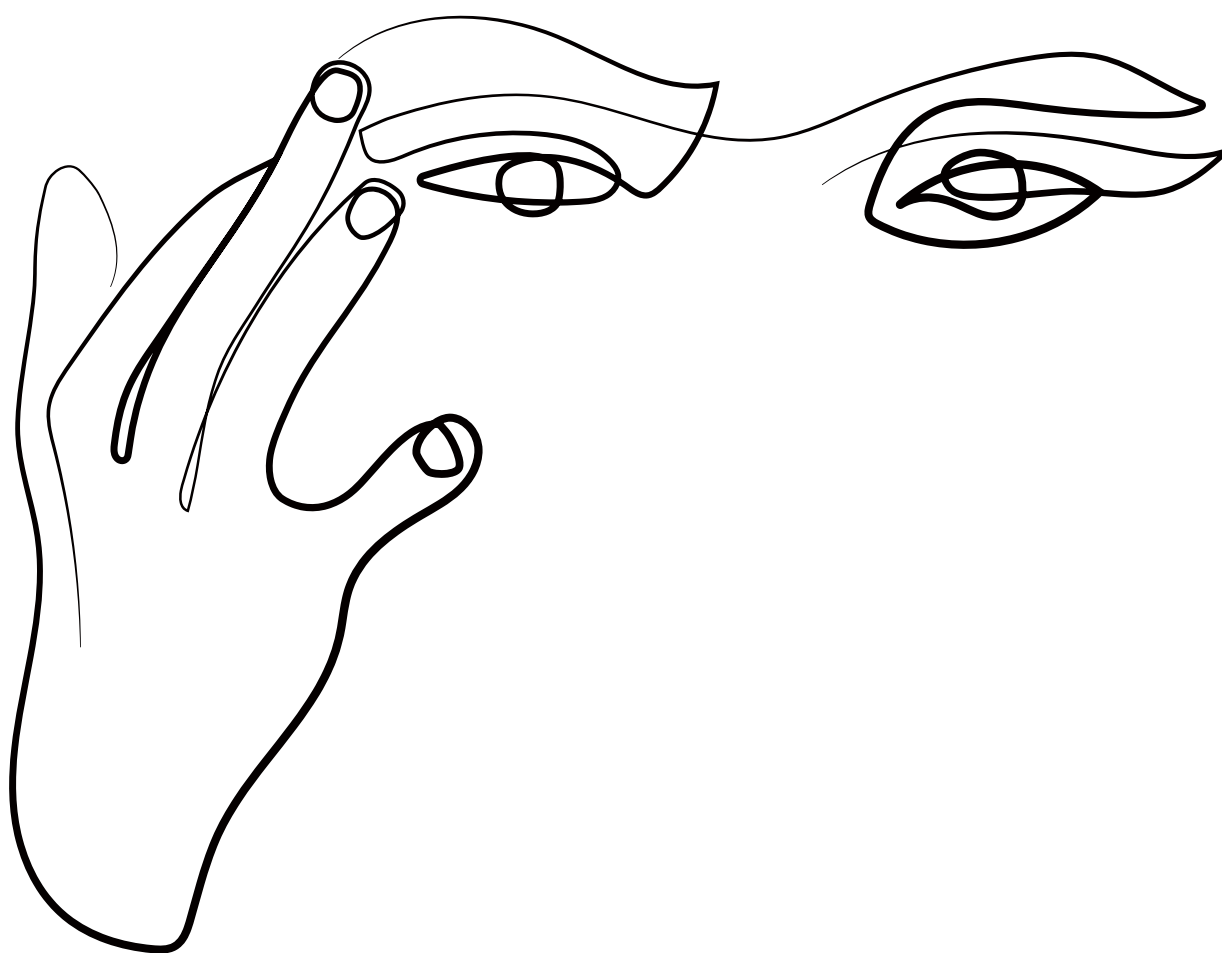
In many ways, one of the key signs of the maturation of the male beauty market will be the end of the very idea of a uniform 'male beauty market' . In a few years' time, men will no longer be discussed as a uniform market segment. Successful companies will have identified niches and developed products and brands specifically targeted at key segments.

For brands today, both incumbents and would be disruptors, the question is no longer about the potential of male beauty. This question is settled. The question is about where in the male beauty market they will chose to play.

Parting Thoughts:

LOOKING INTO

THE CRYSTAL BALL



We opened this report talking about the uncertainty that characterizes the male beauty market. As parting thoughts, we try to cut through this uncertainty and offer our own perspective on where we believe this market is heading:

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The male beauty market represents the ultimate opportunity space for new brands. We believe that local, digitally native, direct to consumer brands will dominate the market and see a huge potential for acquisitions of new male brands by established beauty players, not unlike the 2016 Unilever acquisition of Dollar Shave Club

2

Just like sportswear brands spearheaded the early development of the male grooming and fragrance market, we expect popular male fashion and lifestyle brands to leverage their accumulated equity and customer base to expand into beauty either on their own or through collaborations

3

As of today, male beauty products still largely mimic their female equivalents. We see a huge potential for more fundamental innovations in formulations, packaging and modes of application to fit more closely male lifestyles and behaviors

4

The male search for convenience will fuel the rise of customization and subscription services that will provide the ultimate one-stop beauty solution

5

While male 'beauty occasions' are currently mostly limited to work and dating, we expect the male beauty market to mimic the female market with multiple skincare solutions and 'makeup looks' for specific moments and occasions (Ex: sports, travel, season specific products...)



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