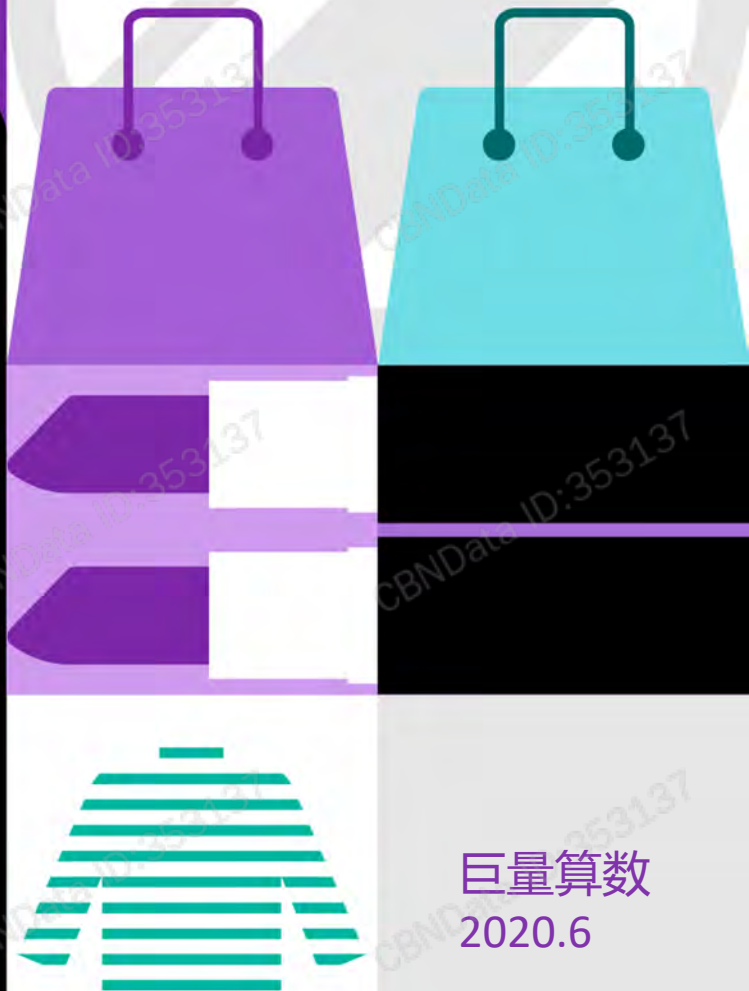


# 直播间里的潮流新时尚

The New Fashion in Makeup Live Stream

## 2020年抖音美妆直播报告

Douyin Makeup Live Stream Report in 2020



# 目录

OVERVIEW OF FASHION LIVESTREAM

## 时尚直播概况



AUDIENCE OF MAKEUP LIVESTREAM

## 美妆看播



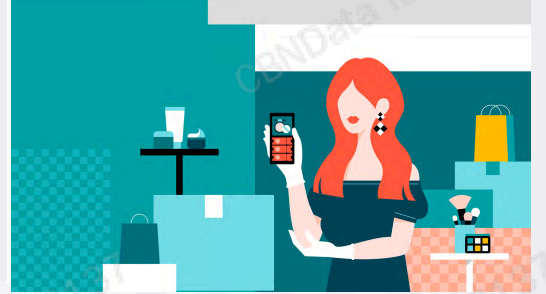
ANCHORS OF MAKEUP LIVESTREAM

## 美妆开播



LIVE STREAM MAKEUP SALES

## 美妆直播带货



# 洞察总结

## Part1. 时尚直播概况

- 直播逐渐常态化，用户规模和增长双向走高
- 抖音直播打开4亿DAU的另一扇窗，近六成用户每天观看抖音直播
- 复产复工开启，需求逐步回归，时尚行业全面复苏，直播热度后来居上
- 特殊时期时尚产业受到异常冲击，直播对产业改造程度最深
- 明星、达人、品牌全面渗透，多层次时尚生态助力行业崛起
- 时尚直播场景IP化发展，云端时尚+直播造节双向刺激新供给与新需求
- 多力驱动、需求回归，美妆行业是时尚直播回归复苏中的重要一环
- 美妆直播：一场高线轻熟女性引领下沉年轻丽人的美丽修行

## Part2. 美妆看播趋势

- 美妆行业社零消费同比增速触底回升，直播刺激行业重启增长
- 美妆看播成为国民必备，5月份看播用户规模超过美妆短视频用户
- 注意力向直播迁移明显，看播时长实现3倍增长，后半夜看播热情最高
- 即时效果展示、沟通体验反馈、快速产品问答，直播在互动中建立信任感
- 内容、产品和主播都是看播焦点，实用教程和技巧话题助力直播间引流

## Part3. 美妆开播趋势

- 美妆线上开播热潮新涌，主播数、直播场次实现翻番增长
- 晚八点是美妆开播高峰，最有利于预热和吸引晚间空闲时段的用户
- 美妆直播参与者不断升级，超七成达人开播，月度复播率超过80%
- 美妆短视频领域的优秀达人逐步成功迁移到直播间
- 美妆品牌直播参与度加强，近六成品牌每周至少开播一次
- 主流品牌陆续开播，直播助力品牌从深度沟通到长效运营
- 东部经济带开播品牌商家最多、市场活力最强，产业集中态势明显

## Part4. 美妆直播带货趋势

- 需求重启、信心回归，美妆直播带货效果突出，购物车点击翻倍增长
- 美妆带货品类分布：面膜、护肤套装需求量大，口罩也挡不住口红大军
- 美妆直播带货不可或缺三要素：限时优惠+主播推荐+互动氛围
- 达人主播是刺激购买的重要促因，互动能力和专业度决定带货效果
- 达人带货：平台IP造势+抽奖升温+独特互动，突破单场千万级高销
- 明星+美妆直播：大咖加持，顶流效应，助力行业破冰
- 品牌开播也能有效刺激购买意愿，六成看播用户对直播产品认知提升
- 直播能够调动用户后续深层探索，激活品牌长效营销机会点
- 品牌带货案例：品牌、达人多方联动、有效配合，实现品效双赢

# KEY FINDINGS

## Part1. OVERVIEW OF FASHION LIVE STREAM

- Live stream is widely accepted, the user scale and growth rate are both rising.
- Douyin live stream achieves 400 million DAU, nearly 60% of users watch Douyin live stream every day.
- Production and work restarted, fashion industry fully recovered, the popularity of live stream is increasing.
- Live stream brings the deepest transformation to fashion industrial, which has suffered negative impact during coronavirus period.
- Diverse PGC ecology in Douyin platform help fashion industry to recover.
- The development of IP-based fashion live activities stimulate new supply and new demand for fashion industrial.
- Beauty industry plays an important role in the recovery of fashion live stream.
- Participants of Makeup live stream: anchors are mainly mature women from first-tier cities, and audiences are mostly young women from lower-tier cities.

## Part2. AUDIENCE OF MAKEUP LIVE STREAM

- The growth rate of the society's consumption on cosmetics industry rises significantly, live stream stimulates the industry to restart.
- Watching makeup live stream has become a national popular entertainment, the number of makeup live watching users in May surpassed the number of makeup short video users.
- Attention has been shifted to the live stream significantly, the duration of watching the live has been increased by 3 times, and the enthusiasm for watching the makeup live stream is highest in the midnight.
- Interaction like real-time display and quick Q&A are key points to build trusts during live stream.
- Content, products and anchors are the focus of live audience when watching makeup live, tutorials and practical topics are more attractive.

## Part3. ANCHORS IN MAKEUP LIVE STREAM

- A new upsurge in makeup live stream has emerged, the number of anchors and livestream has doubled.
- The peak of makeup live appears at 8pm, which is most conducive to attracting users in the free evening time.
- Participants of the makeup live continue to upgrade, with over 70% of the KOL going live, the monthly rebroadcast rate exceeds 80%
- Makeup Brand participate in Douyin live stream more frequently, nearly 60% of brands go live at least once a week.
- Douyin live stream helps brands with in-depth communication with users and long-term CRM operation.
- The eastern economic area has the largest number of brand merchants, the strongest market potential, and obvious trend of industrial concentration.

## Part4. LIVE STREAM MAKEUP SALES

- Livestream makeup sales have excellent performance, clicks of shopping carts achieves double increase.
- Top 3 most popular makeup categories of live sale: facial mask, skin care sets, lipstick.
- Three indispensable elements for livestream makeup sales: attractive offer, anchor recommendation and interactive atmosphere.
- Purchase intention is stimulated by anchors, who's interaction and professionalism determine the effect of live sales.
- Celebrities's influence can help makeup live stream to attract attention.
- Branded livestream can effectively stimulate purchase intention, 60% of viewers have improved their product awareness after watching branded live.
- Branded livestream can motivate viewers to explore product more deeply like search, recommendation, following brand etc.
- Case of branded livestream makeup sales: Effective cooperation of brand and KOL achieves win-win result in brand recognition and revenue.



# 时尚直播概况

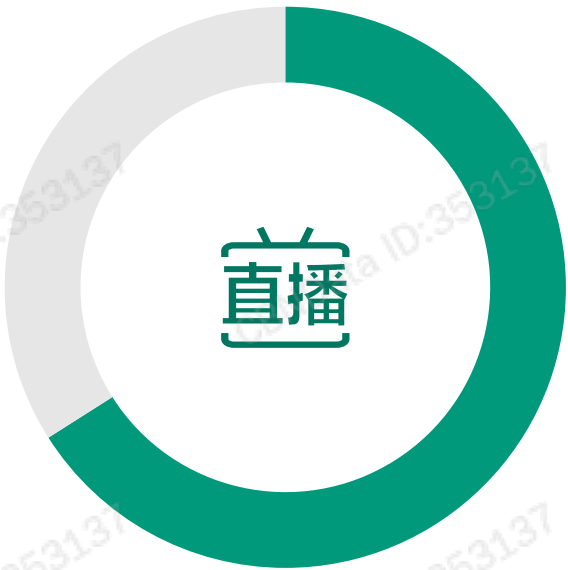
OVERVIEW OF FASHION LIVE STREAM



Part.1

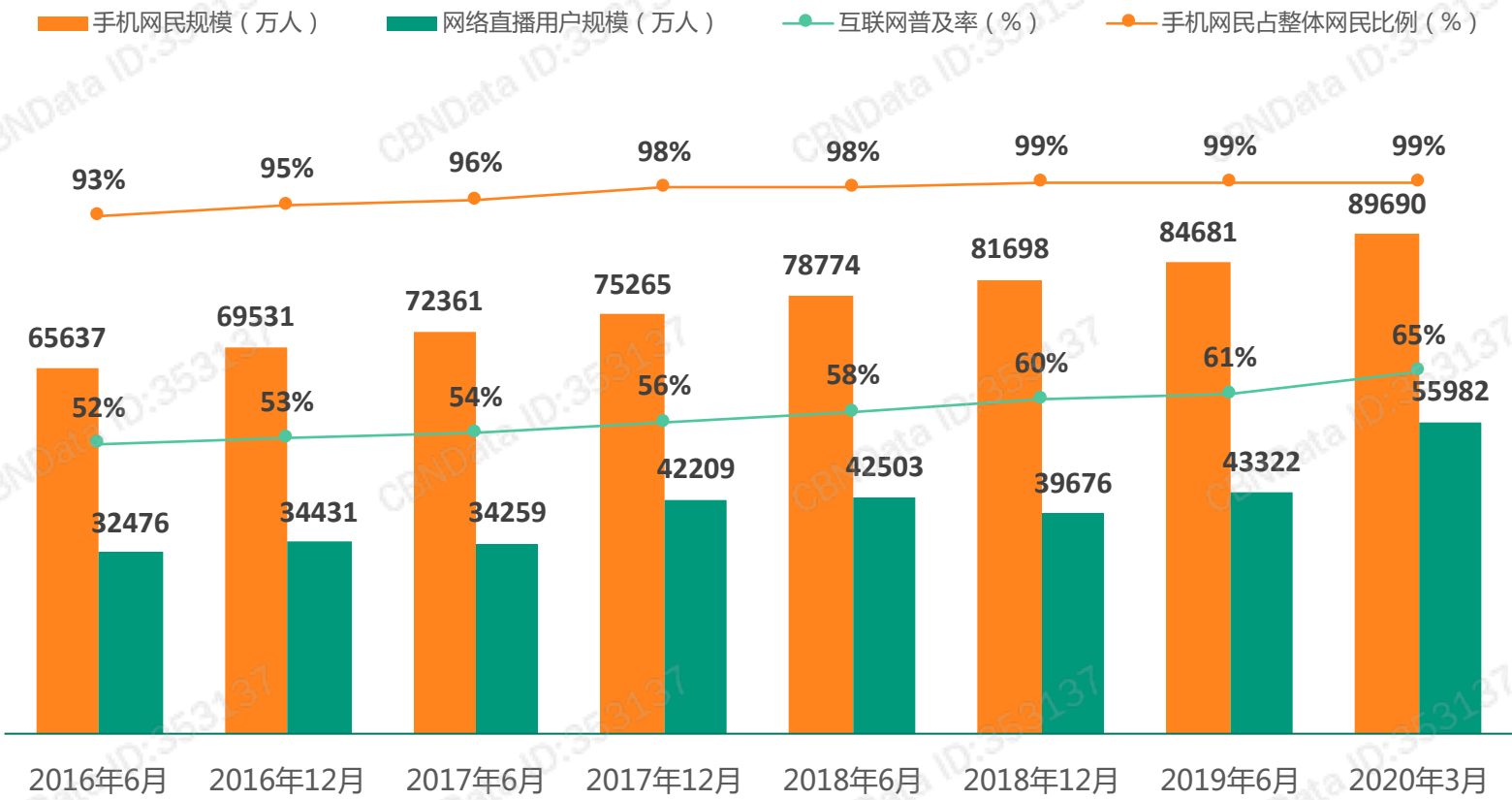
# 直播逐渐常态化，用户规模 and 增长双向走高

中国网络直播用户在整体网民中占比近2/3，网络直播已经成为重要的数字化传播媒介



数据来源：CNNIC，巨量算数整理

中国网络直播行业用户规模趋势



# 抖音直播打开4亿DAU的另一扇窗，近六成用户每天观看抖音直播



## 关注抖音直播的用户中

你多久看一次抖音直播？

“每天至少1次”

58%

## 抖音直播初印象

50%  
有趣活泼的

49%  
亲民接地气

48%  
个性有特点

41%  
时尚新潮的

32%  
高级有品质

# ■ 复产复工开启，需求逐步回归，时尚行业全面复苏，直播热度后来居上

2019.12-2020.5抖音时尚直播场次分天份额

直播大盘

时尚直播

除夕

成长探索期

服饰、美妆商家库存压力较大，通

全面复苏期，供需两端双向回暖

商场、品牌店、中小专卖店、产业带商家等全面激活，试水直播，明星达人开播推高热度峰值，直播成功经验逐步积累，用户侧随着环境好转需求大量释放，行业回暖，走势超过大盘水平

预览已结束，完整报告链接和二维码如下：

[https://www.yunbaogao.cn/report/index/report?reportId=1\\_16866](https://www.yunbaogao.cn/report/index/report?reportId=1_16866)

