



Vietnam cosmetics market 2020

Q&Me is online market research provided by Asia Plus Inc.



Overview

The cosmetic market has grown steadily by the limitless diversity of consumer aspirations and by innovation

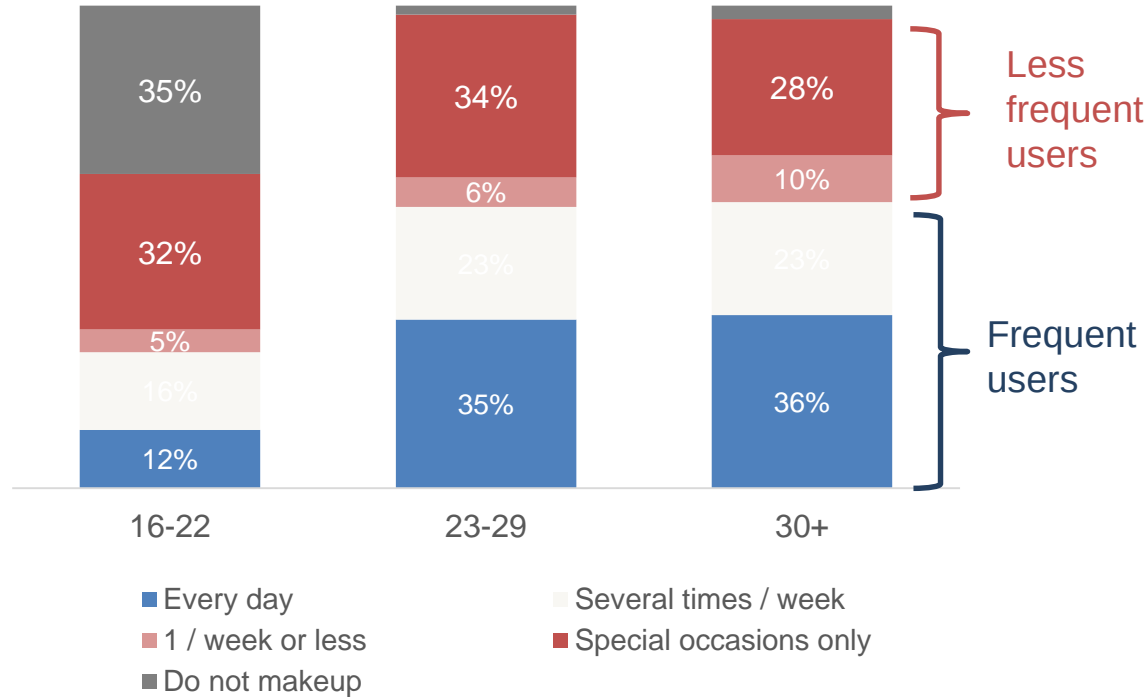
To keep track of the habits and behaviors of Vietnamese cosmetics users, the annual survey about the Vietnam cosmetics market was run by Asia Plus in Jan. 2020, succeeded the two surveys of the same topic from Jan. 2019 and Jan. 2018.

The survey was conducted among 458 females, from over 16 years old nationwide.

A woman with long dark hair is blurred in the background, looking towards the camera. In the foreground, a clear glass holds several black-handled makeup brushes with blue-tinted bristles. One brush handle has a small white label that reads "BRANDI.ESS". To the right, a white ceramic vase with a perforated pattern holds a green succulent. A white jar is partially visible on the left. The scene is set on a white surface.

Summary

How often do they make up?

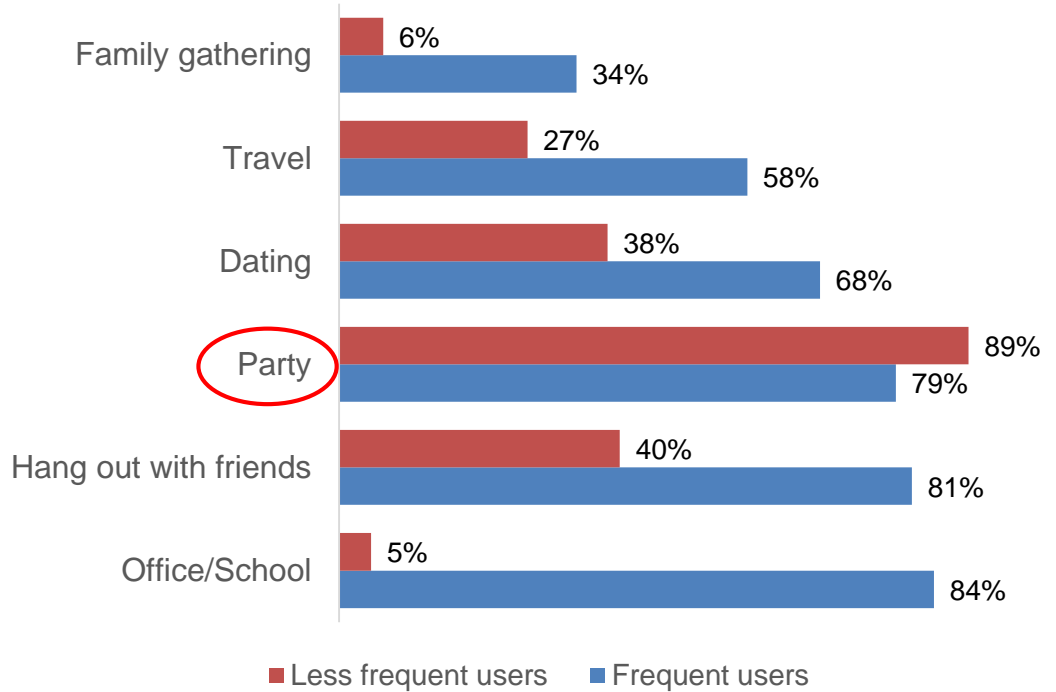


Makeup frequency differs by age. More than half of 23 and above make up regularly





When do they make up



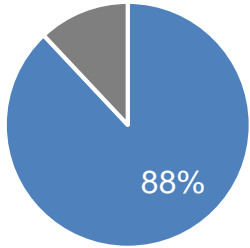
The major makeup occasions for less frequent users are party. but not for the occasions such as office / school



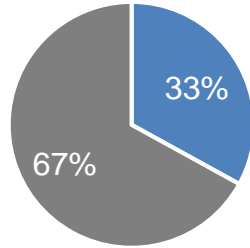
Q. Please choose all the occasions that you usually make up

Popular cosmetic items (often use)

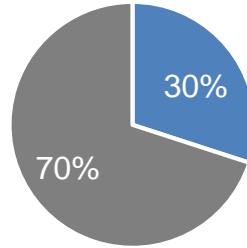
Lipsticks



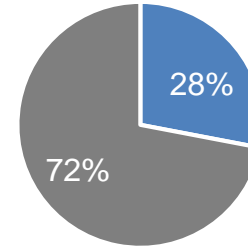
Eyebrows



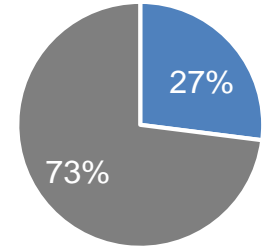
Concealer



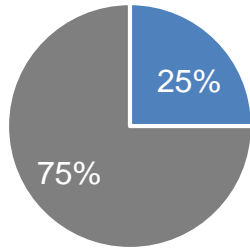
Foundation



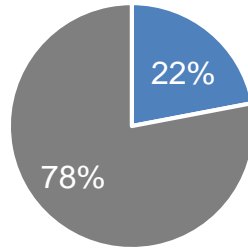
Mascara



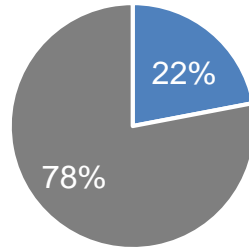
Blush



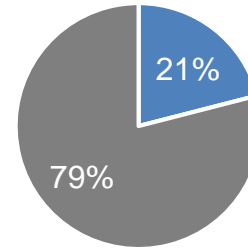
Makeup base



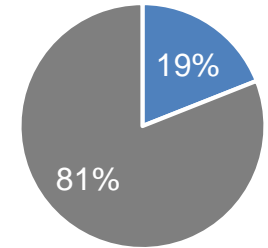
Face powder



BB/CC/DD cream



Lip gloss

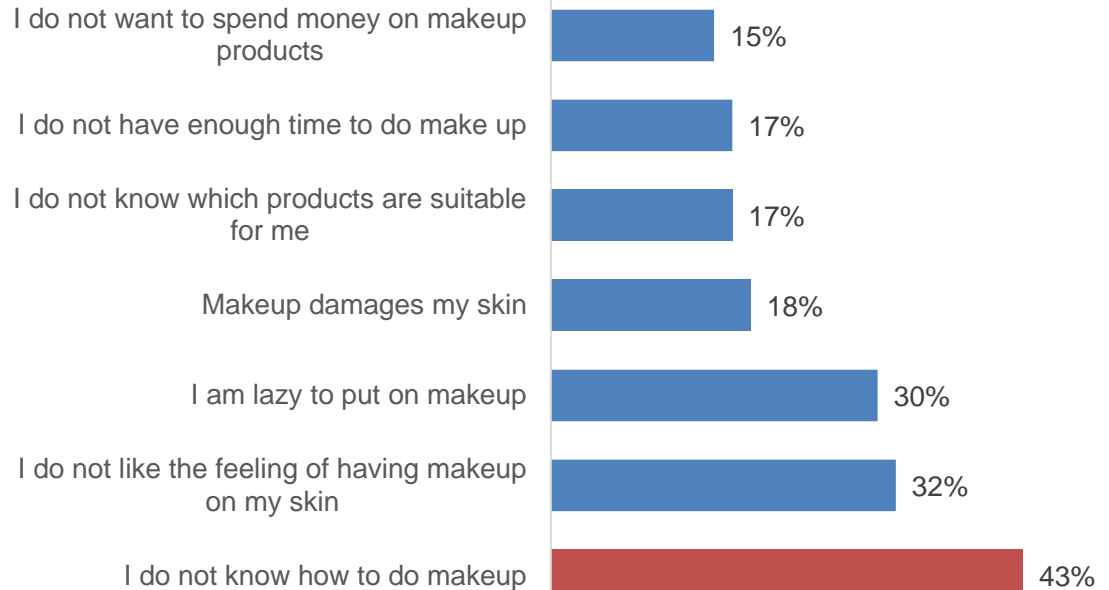


Lipsticks are the one that are used majority of makeup users. Other than lipsticks, the usage is less than 1/3.



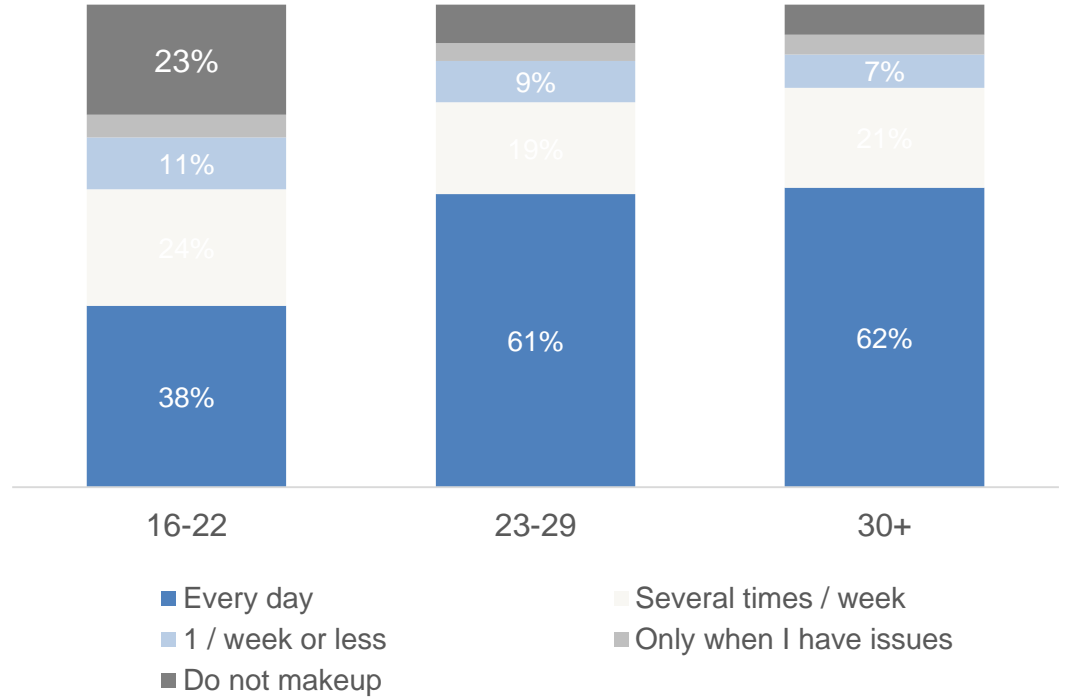
Reasons not to makeup

Non-makeup users are the youth who does not know how to do the good makeups, or who do not spare their time for makeup





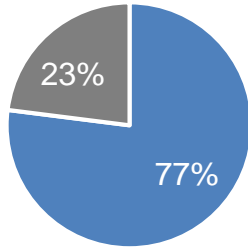
How often do they skin care?



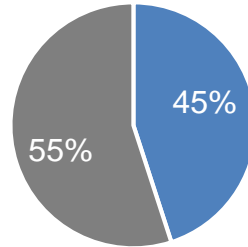
60% of above 23 years old do skin care daily

Popular skin care items (often use)

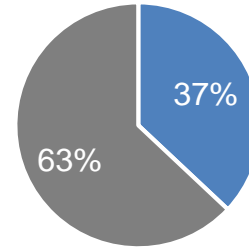
Facial cleanser



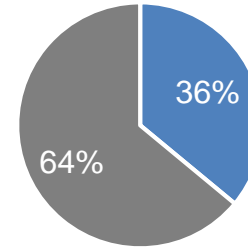
Sunscreen



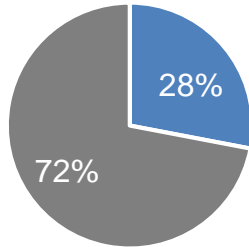
Facial moisturiser



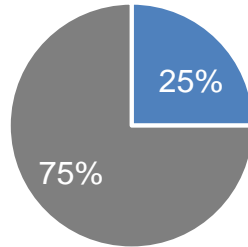
Toner



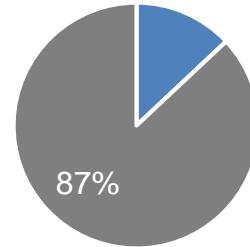
Facial oil or serum



Facial mask



Eye cream

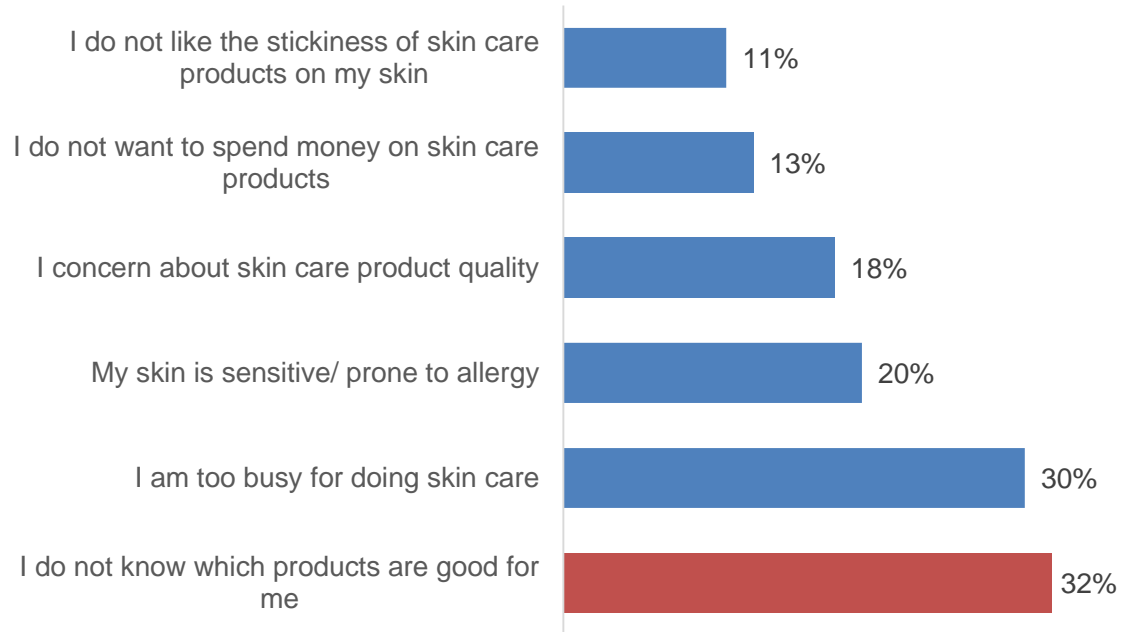


Facial cleanser (including makeup remover) is most commonly used followed by Sunscreen and moisturiser

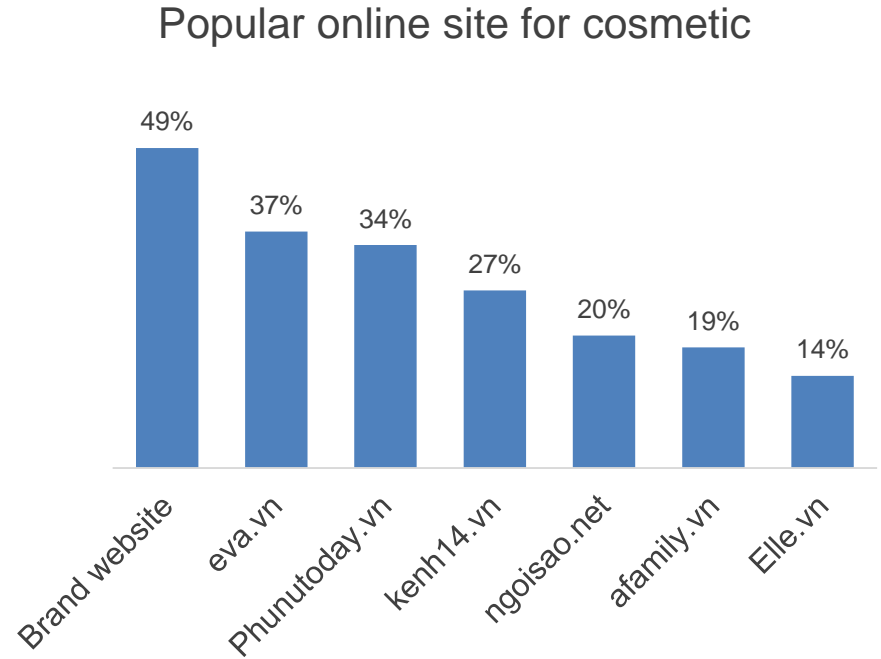
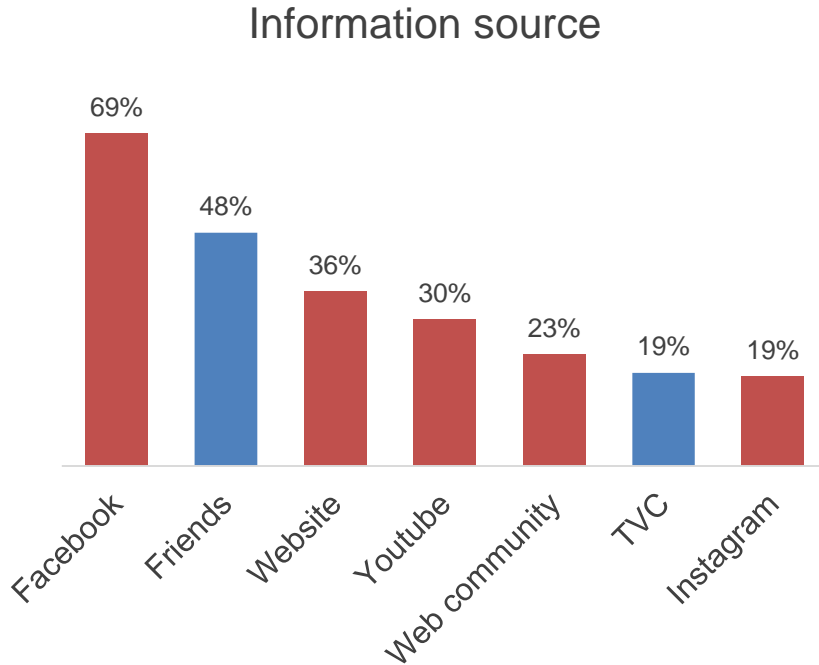


Reasons not to skin care

Lack of knowledge is the reasons why they do not do skin care



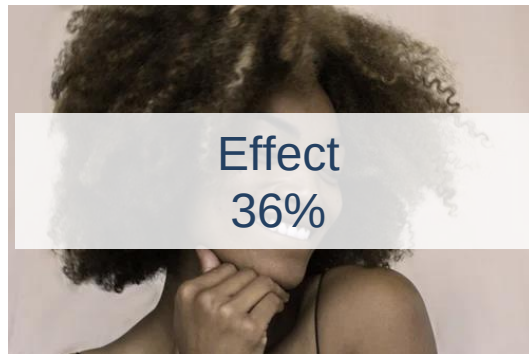
Information source



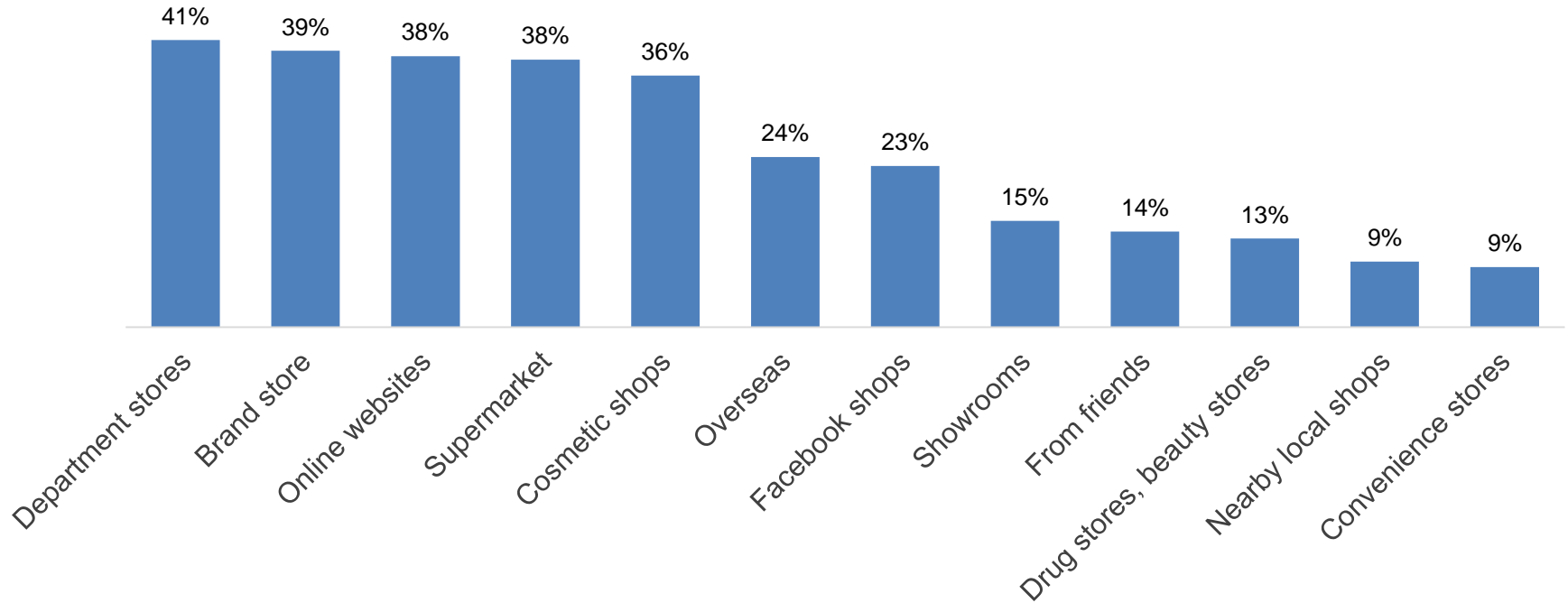
Majority of the information source are online (Facebook, web, YouTube)

Important factors in purchase

Rely on country of origin, ingredient to ensure the product quality



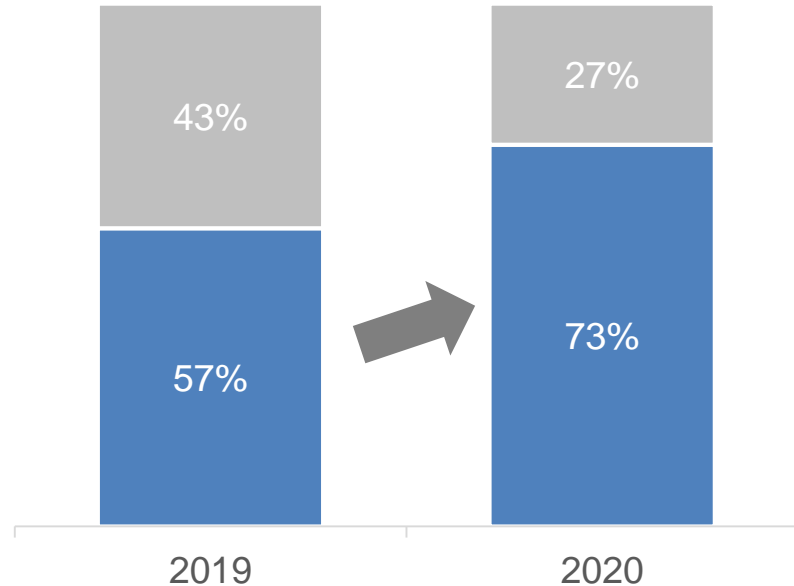
Popular purchase locations



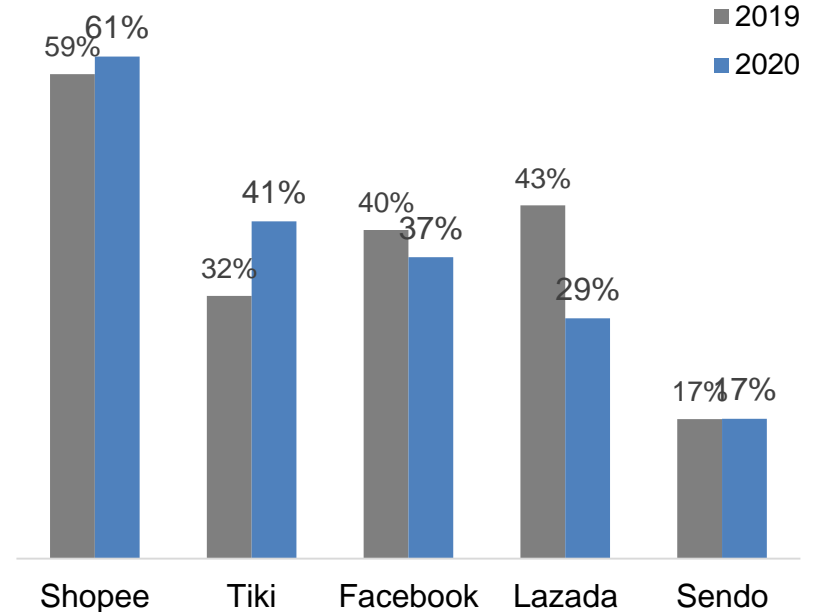
Department stores and brand stores are the most popular places to shop for cosmetics.

Higher usage of online shopping

Those who use online shopping to buy cosmetic products



Popular online channel



73% have used EC to buy cosmetic products due to good pricing and rich reviews. EC becomes one of the most popular channels for cosmetics

Celebrities with best makeup



1. Ho Ngoc Ha



2. Ninh Duong Lan
Ngoc



3. Ngoc Trinh



4. Hari Won



5. My Tam



6. Chi Pu



7. Huong Giang



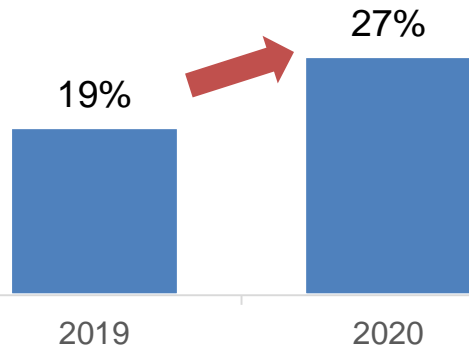
8. Sam

Summary - Trend changes

Cosmetics users increase among the youth

Those who makeup regularly among the youth (16 - 22 years old) increased rapidly. The makeup behavior increased among the younger audience

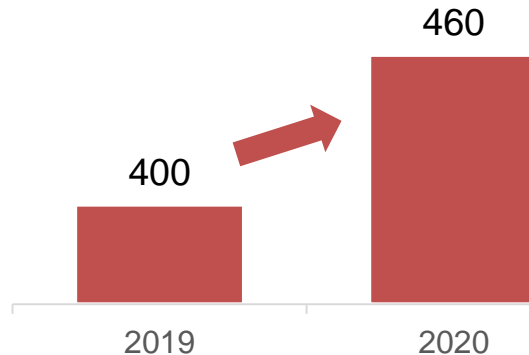
Daily makeup user ratio among 16-22 years old



Spending increase among the regular makeup users

Spending among the regular makeup users (once / week and more) increase by more than 10%. They are willing to pay extra for the better quality and comfort.

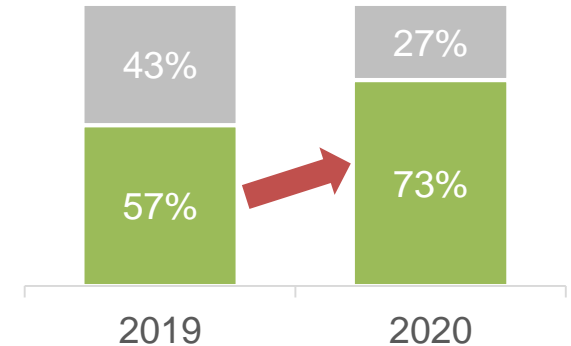
Monthly makeup spending (K VND)



Higher Online reliance

Online becomes one of the popular location to buy cosmetic items as well as the main information source. Shopee, Tiki and Facebook are the 3 biggest online channel

Online usage ratio for cosmetic shopping

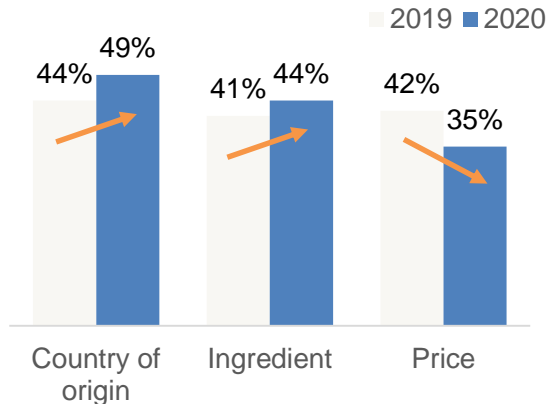


Summary - Trend changes

More attention to the quality

Vietnamese consumer get more quality oriented. Country of origin or ingredients are the items that they pay attention to, while price is still important but less than before

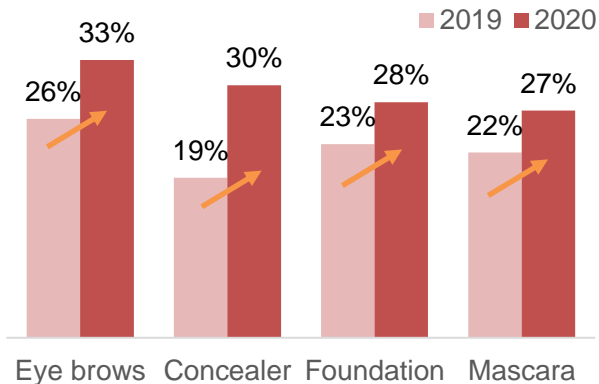
Important factors



Wider variety of makeup ownerships

Vietnamese used to rely on lipsticks only but they came to use the other products for their makeups

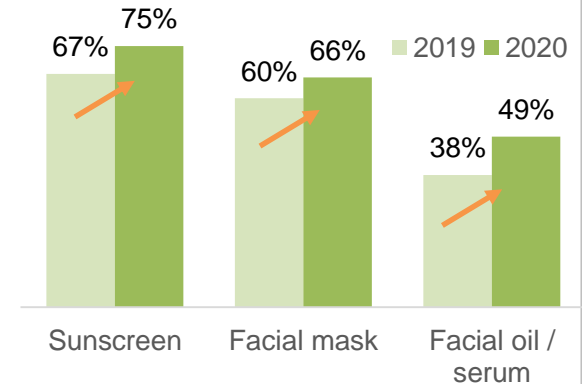
Popular makeup items



Rely on more commercial products for skin care

Skin care product also has more varieties. Vietnamese tends to use commercial products more for their skin care or sun protection

Popular skincare items





Detailed data

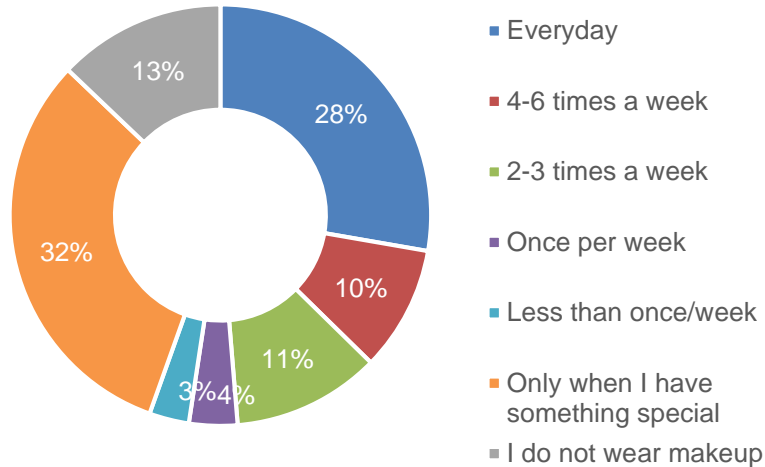




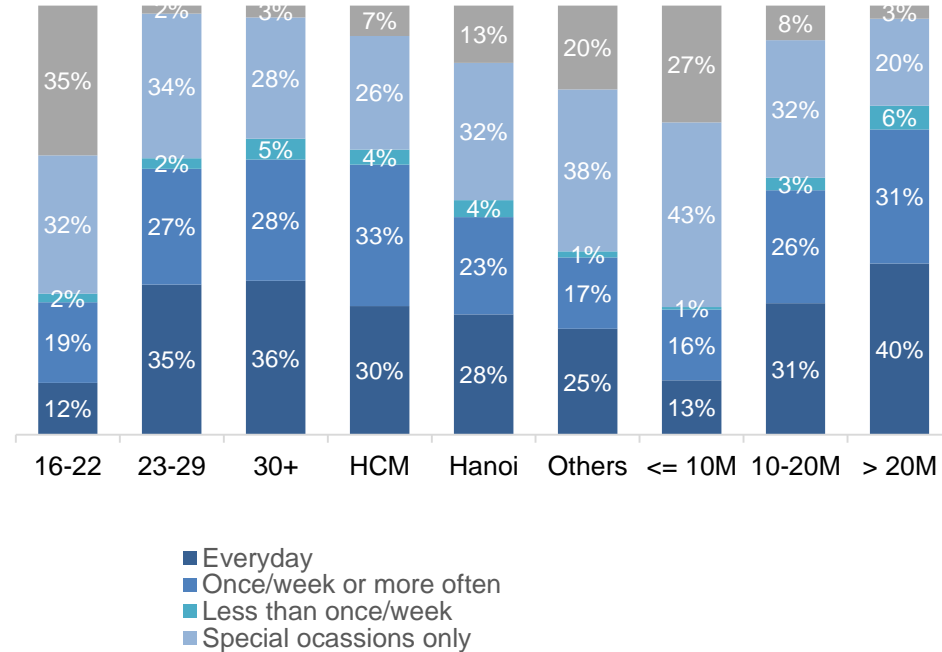
Makeup products usage

Makeup frequency

Makeup frequency



Makeup frequency by demographics

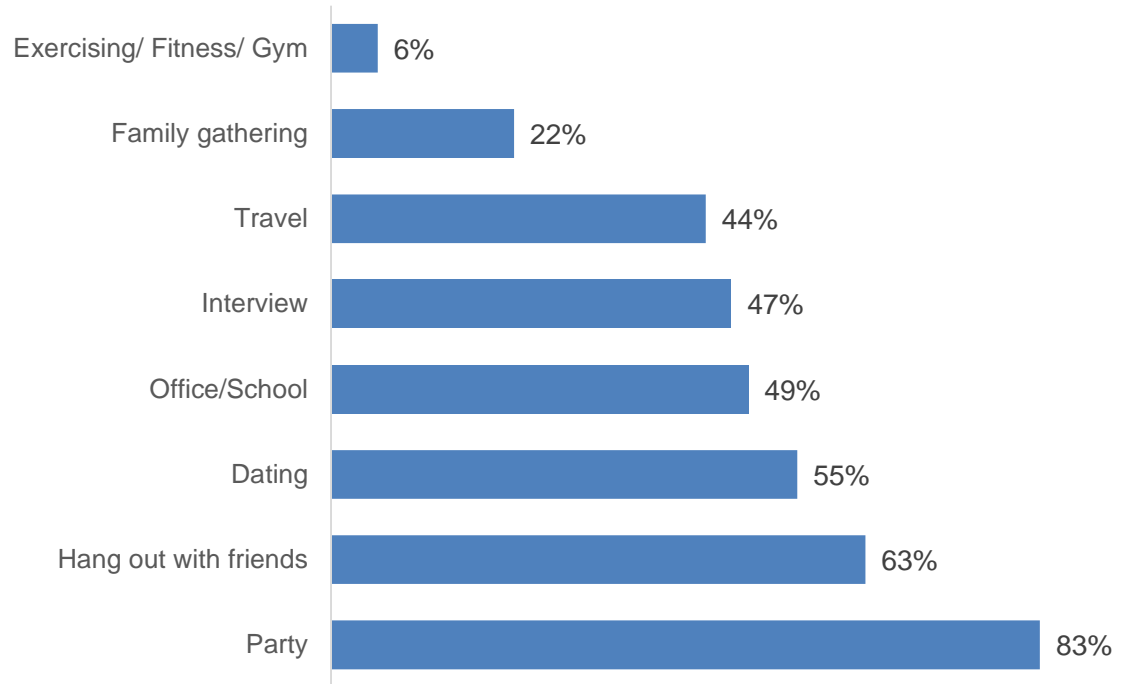


60% wear makeup at least once per week, in which 28% put makeup everyday. 30+ and higher income wear make up more often



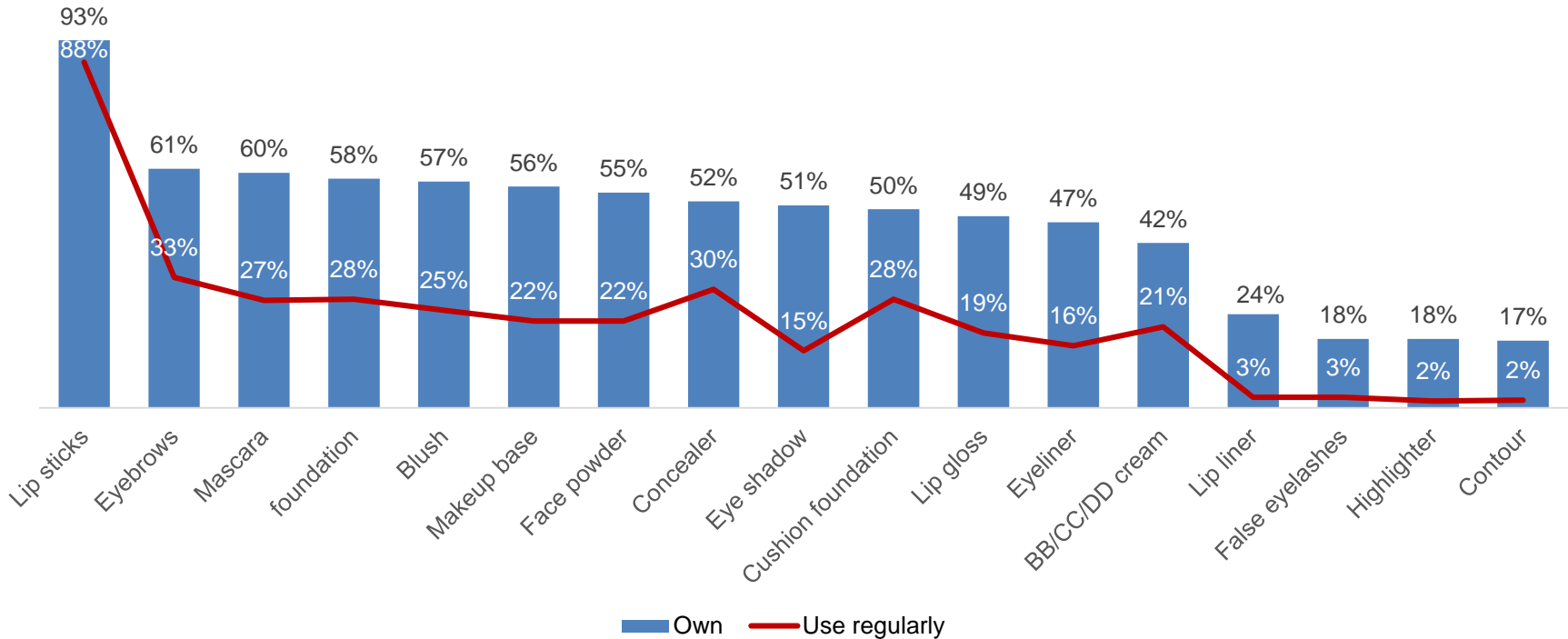
Makeup occasions

People wear makeup most often for party, hang out with friends and dating



Q. Please choose all the occasions that you usually make up?

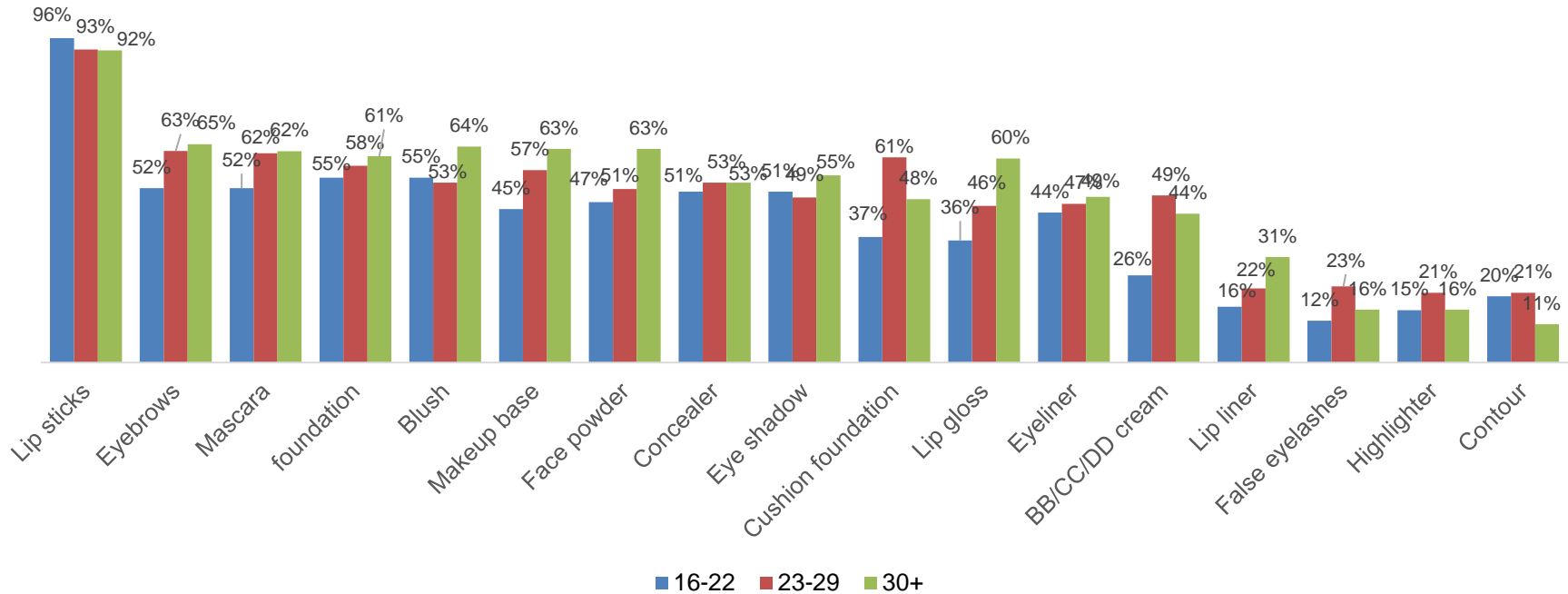
Popular makeup items



People generally own a fair number of makeup items but lipsticks are used most regularly, followed by eyebrows, concealer and foundation.

Q. Please choose all the makeup items that you have? Among those, which products do you use often? (Please pick up 5 products)

Popular makeup items by age

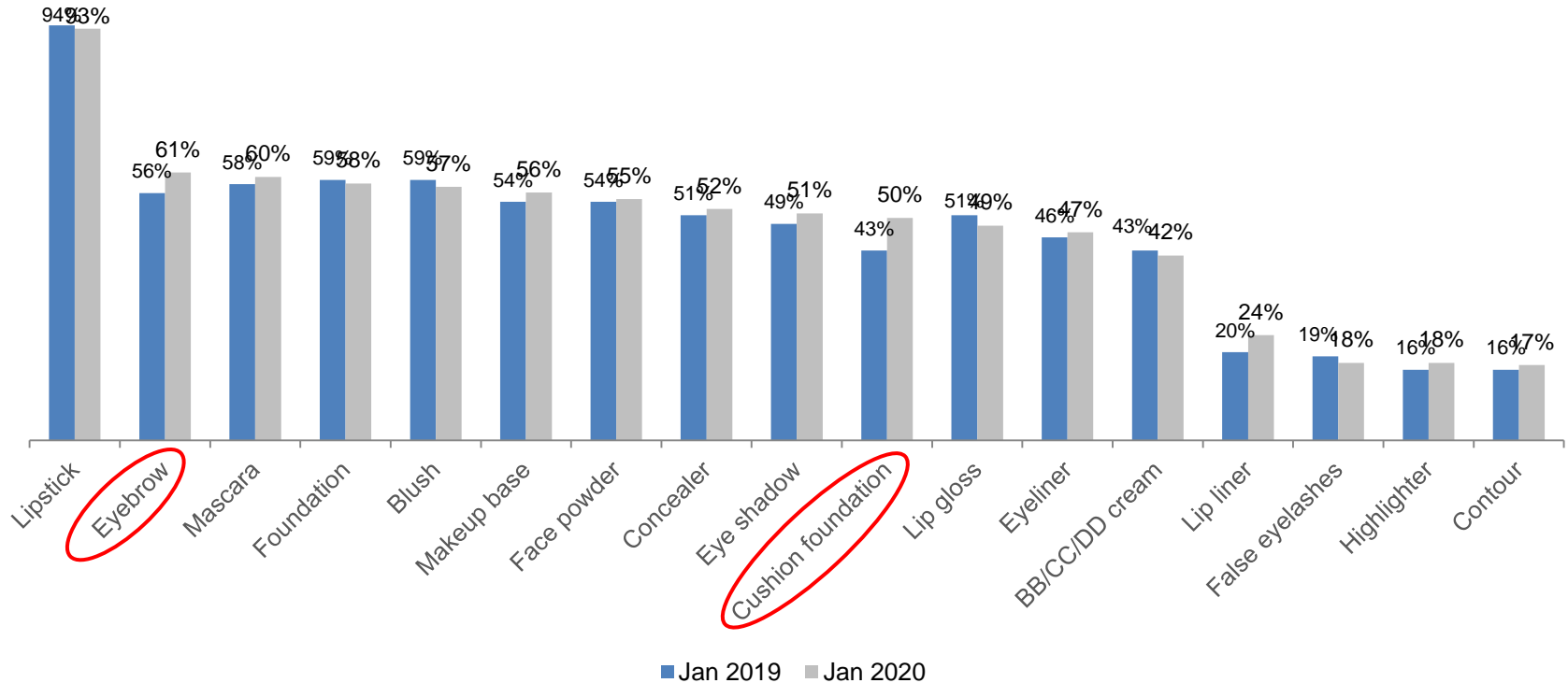


Except lipsticks widely used by all, 30+ years old generally use more makeup items. Concealer, cushion foundation are used popularly by 23-29 year-olds.

Q. Please choose all the makeup items that you have?

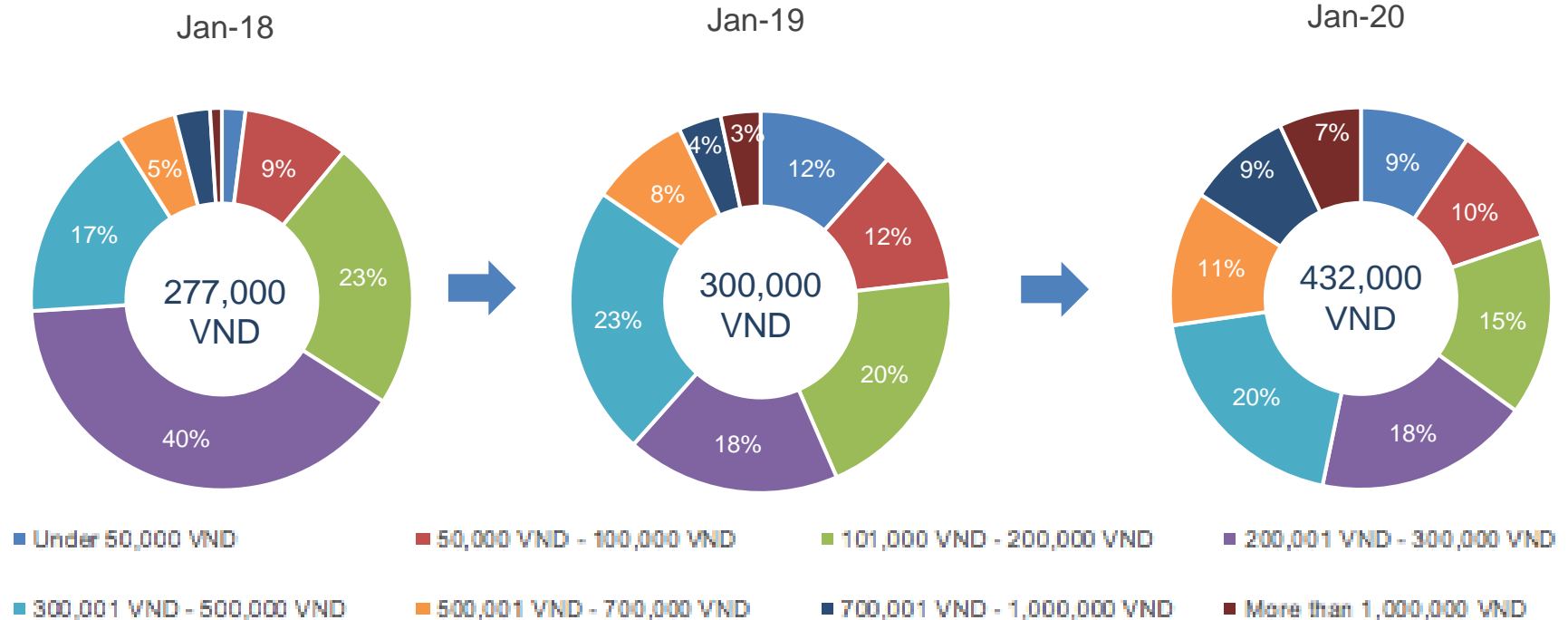


Changes in popularity of makeup items



Biggest changes are seen in eyebrows (+5%) and cushion foundation (+7%)

Monthly spending on makeup products

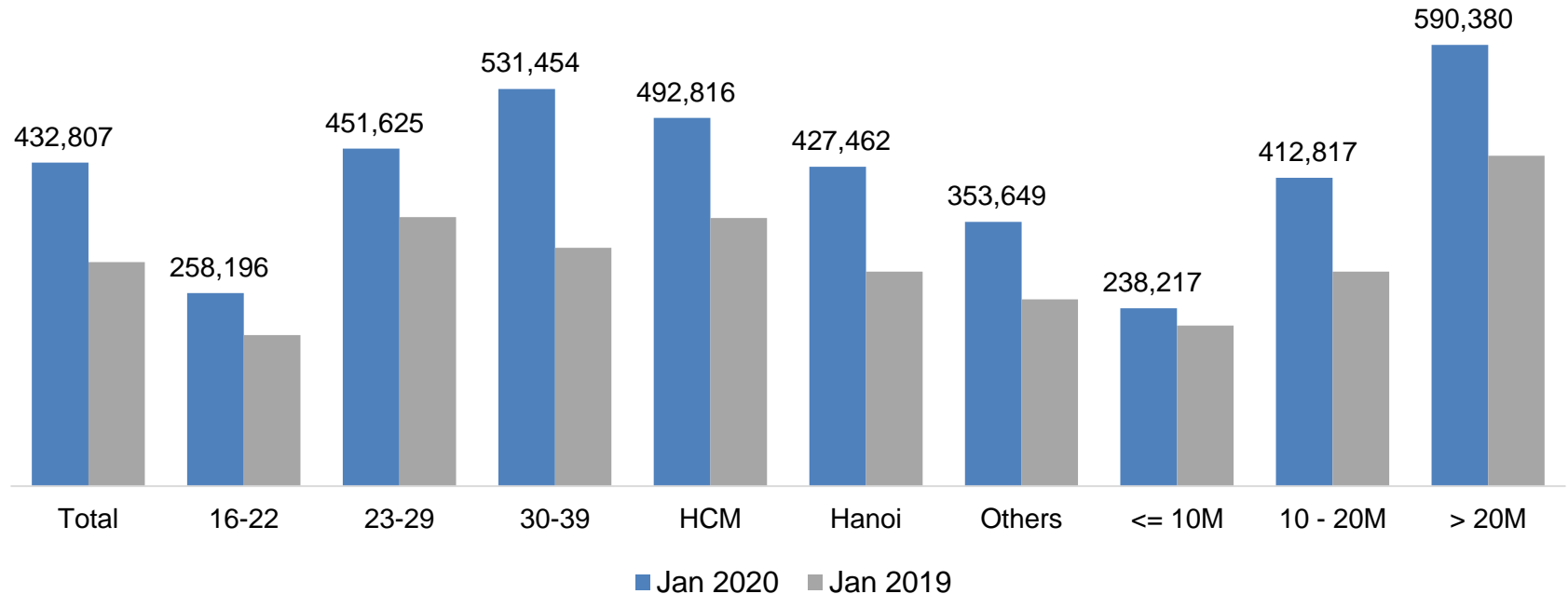


The average monthly spending in 2020 is 432,000 VND, increasing from 300,000 VND in 2019.

Q. How much do you spend on cosmetics on average a month?

Monthly spending on makeup products by demographics

(Unit: VND)



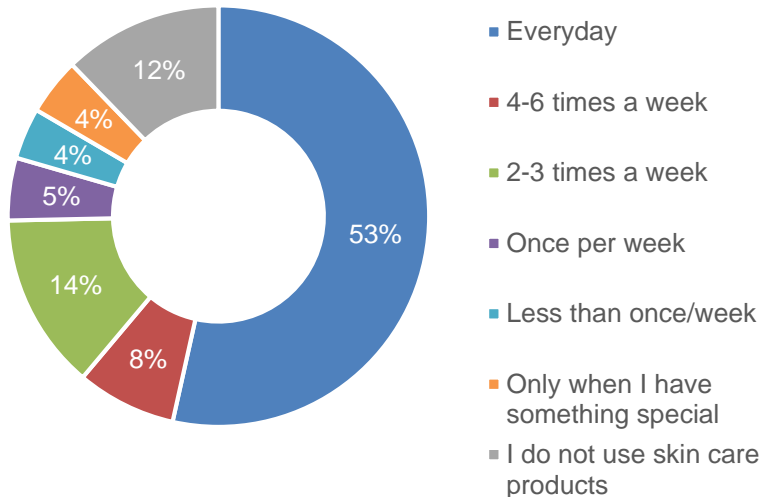
Average monthly spending for makeup of HCM is higher than other cities. Spending for makeup also increases with income.



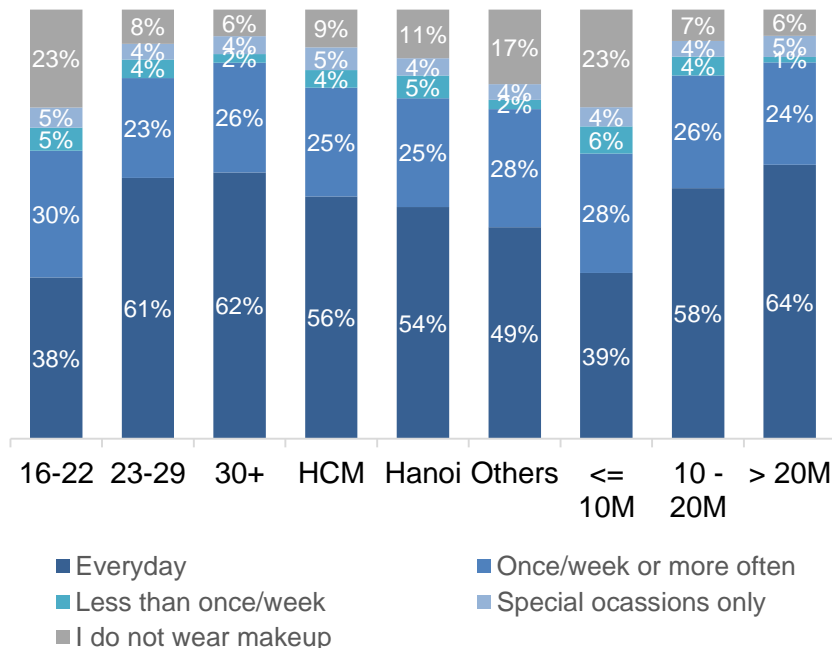
Skincare products usage

Skincare frequency

Skincare frequency



Makeup frequency by demographics



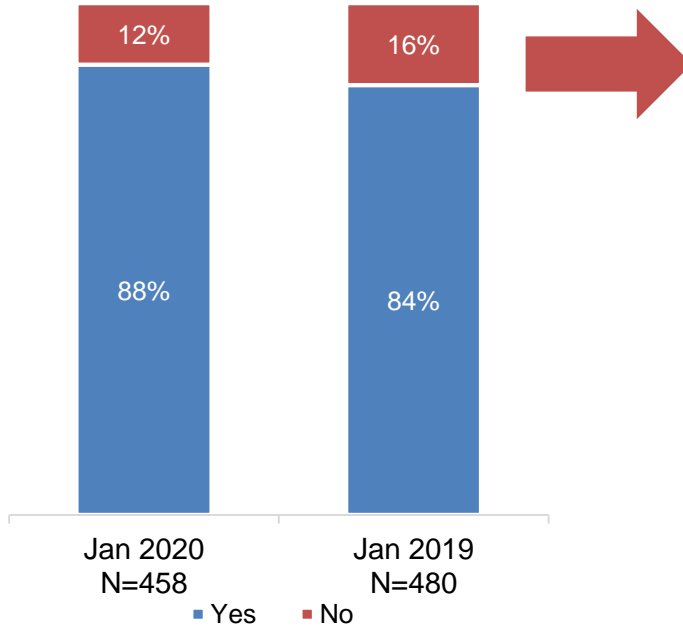
79% use skincare products once/week or more often, in which 53% do skincare everyday. 30+ years old and 20M+ VND income use skincare products more often.

Q. How often do you use skin care products?

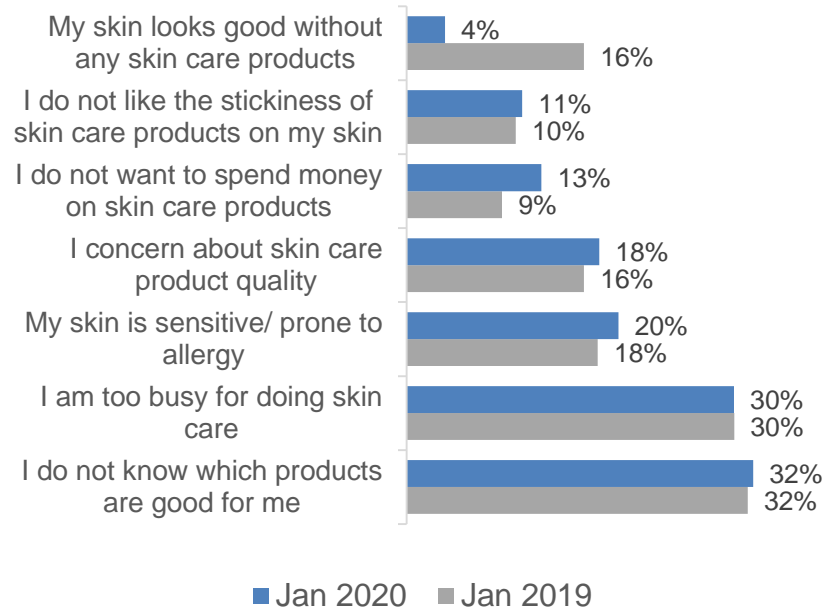


View of skincare non-users

Skincare product usage



Reasons for not using skincare products



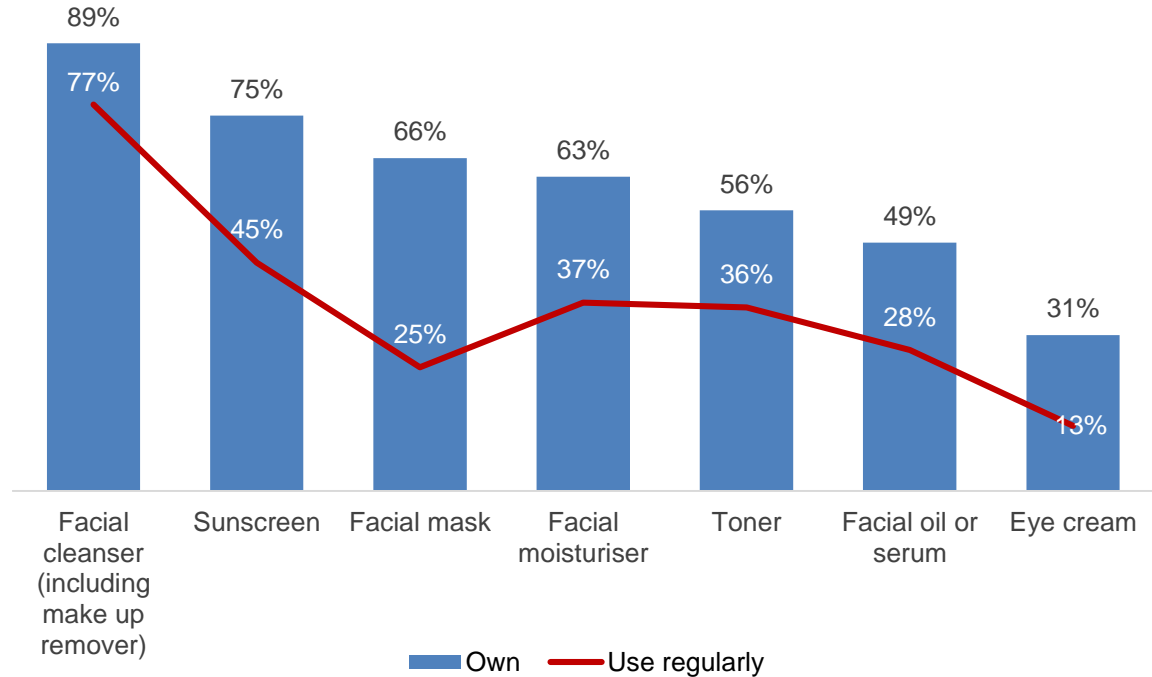
Skincare users have increased. Product knowledge and timing are reasons not to use skincare products

Q. Why do not you use skincare products?



Popular skincare items

Facial cleanser is the most popular bought and used skincare item, followed by sunscreen

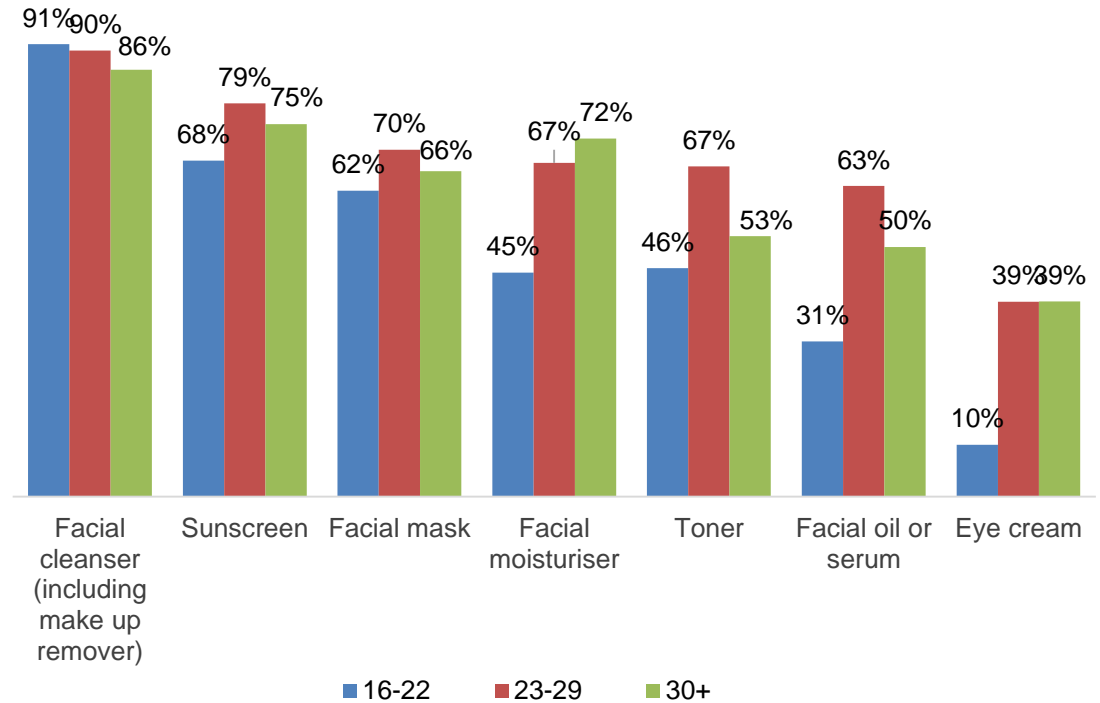


Q. What are the items that you have bought? Among those, which ones do you use most often?



Popular skincare items by age

Facial cleanser is the most popular bought and used skincare item, followed by sunscreen

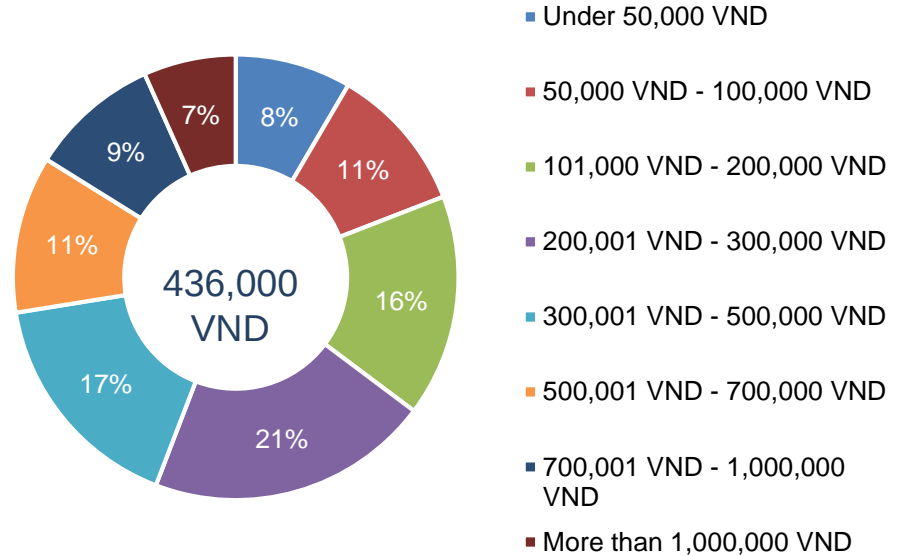


Q. What are the items that you have bought? Among those, which ones do you use most often?



Monthly spending on skincare products

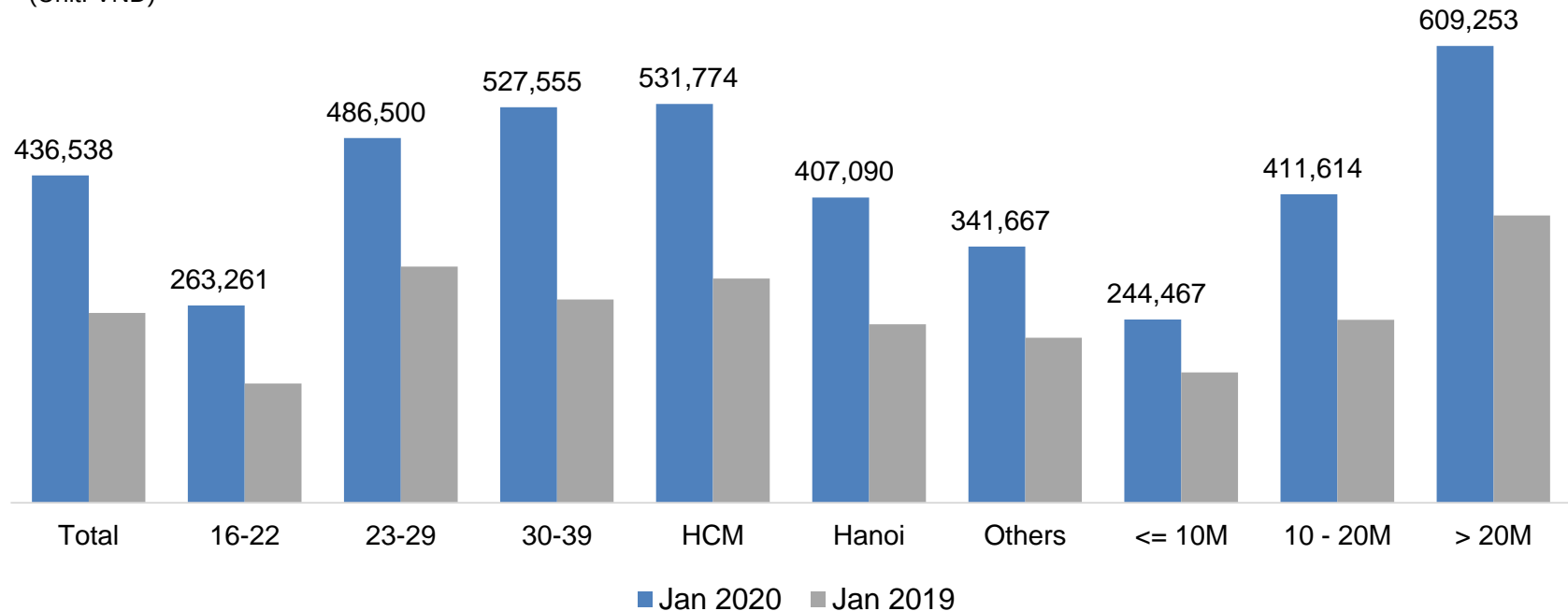
The average monthly spending on skincare products is 436,000 VND



Q. How much do you spend on skin care on average a month?

Monthly spending on skincare products by demographics

(Unit: VND)



Average monthly spending for makeup of HCM is higher than other cities. Spending for makeup also increases with income.

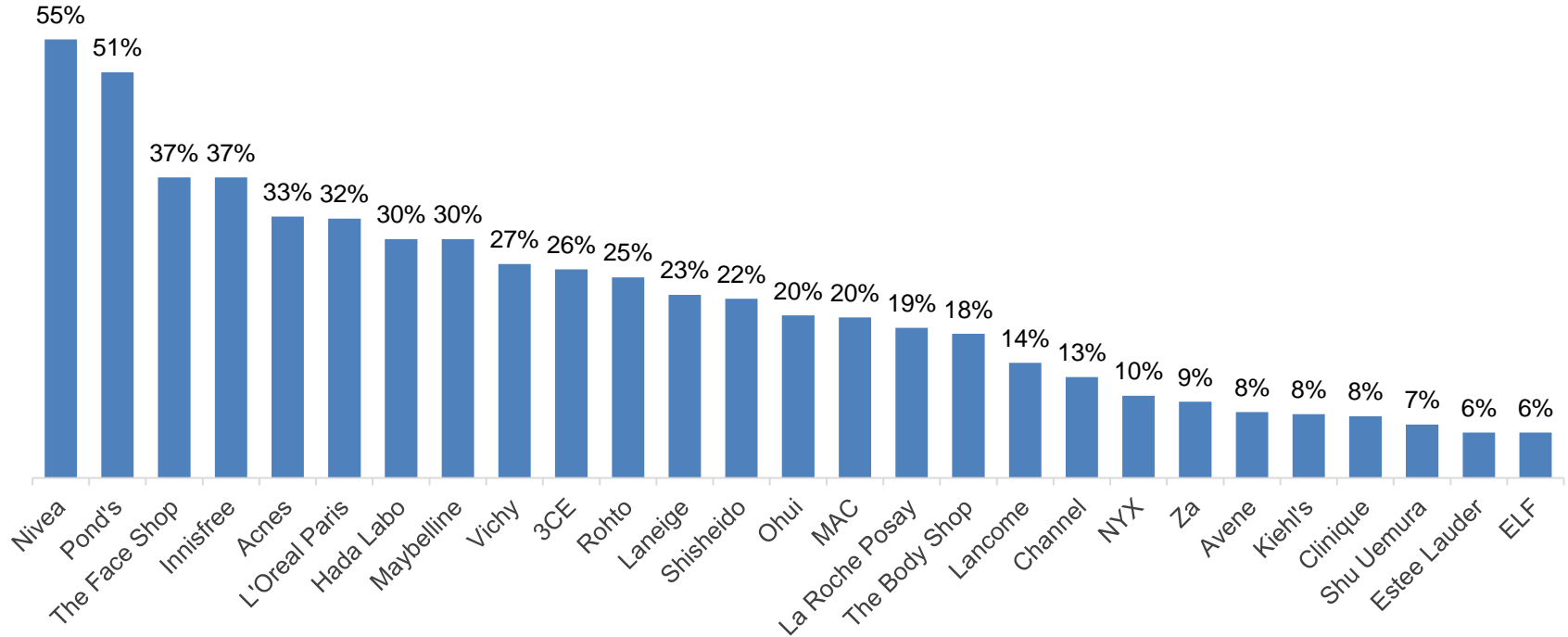
Q. How much do you spend on cosmetics on average a month?





Cosmetic products purchase

Brands in use

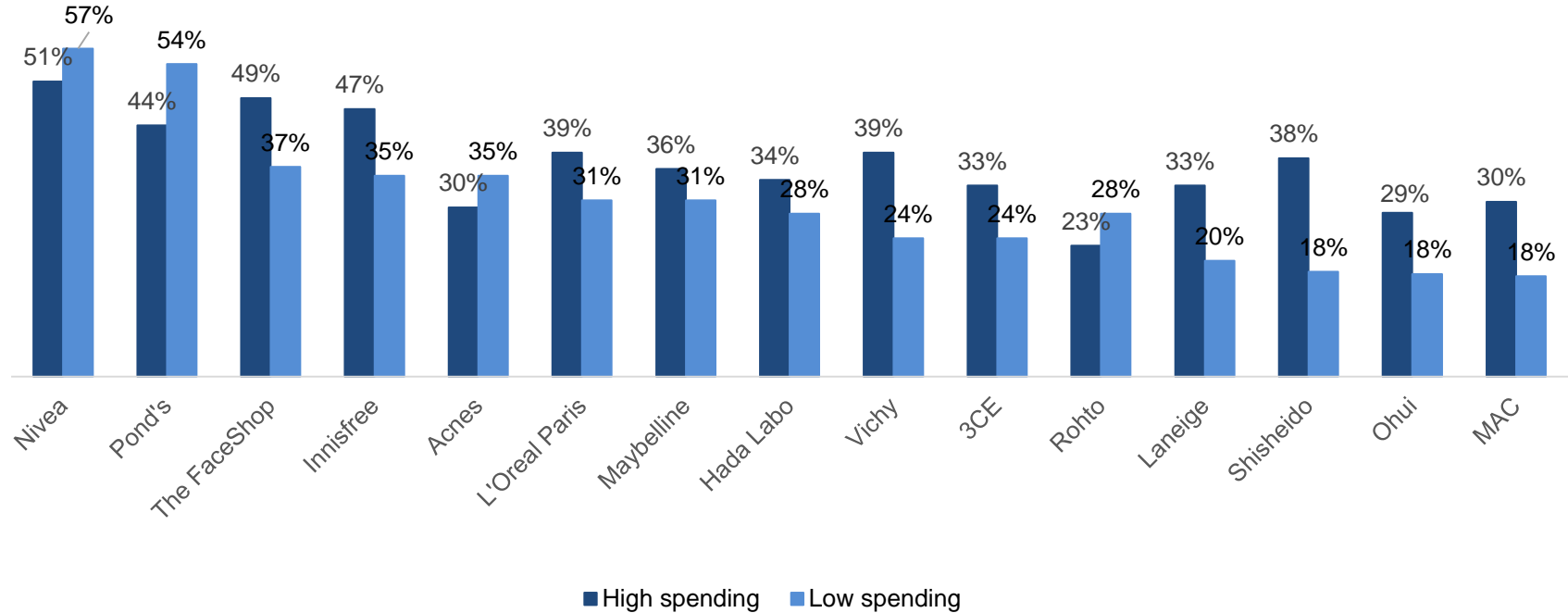


Top 3 most used brands are Nivea, Pond's and The Face Shop

Q. Please choose the beauty brands that you have used?

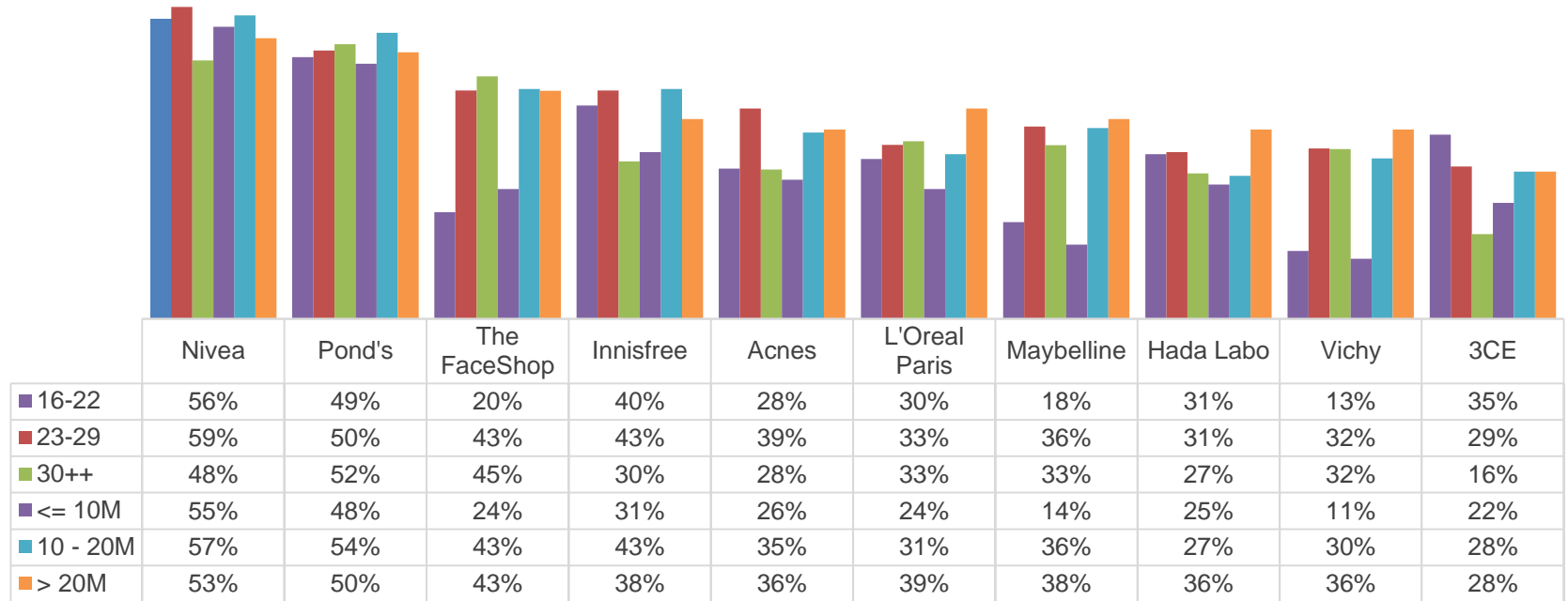


Brands in use



High spending users prefer using higher price brands such as TFS, Innisfree, Vichy and shiseido

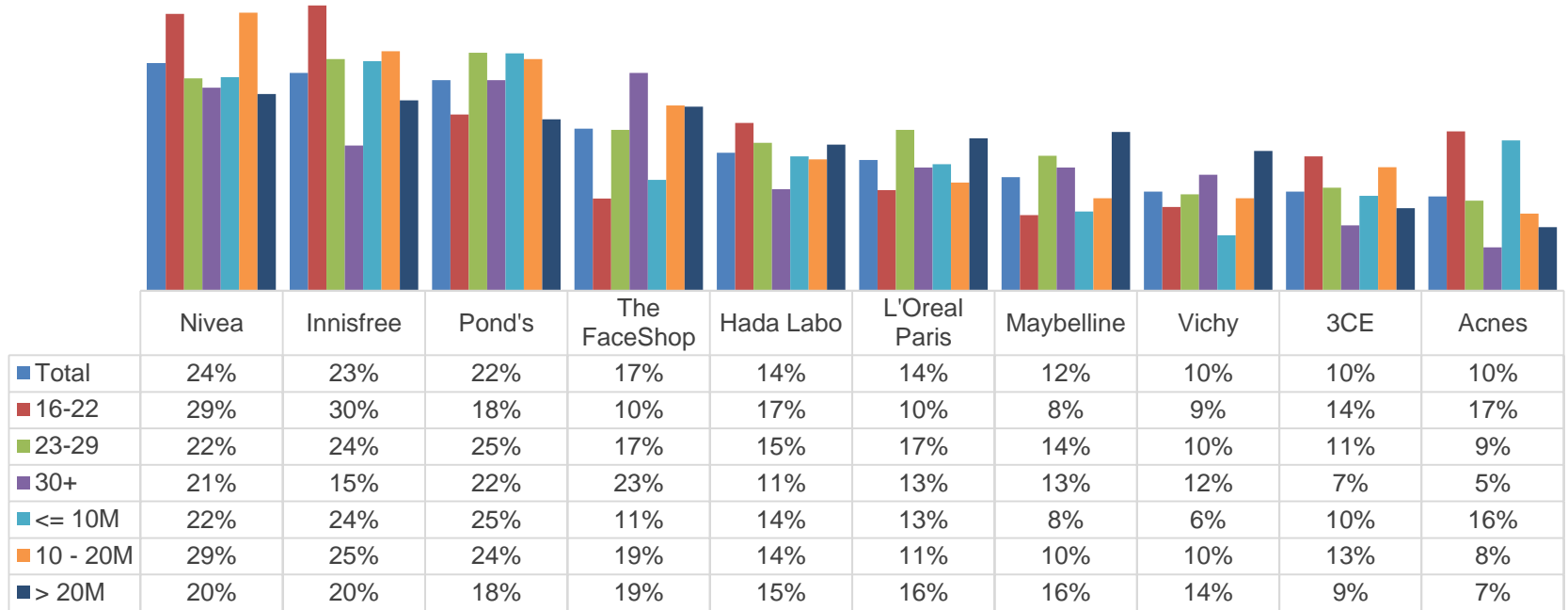
Top 10 brands in use by demographics



Nivea is the most dominant. L'Oreal and Hada Labo especially popular among high incomers.

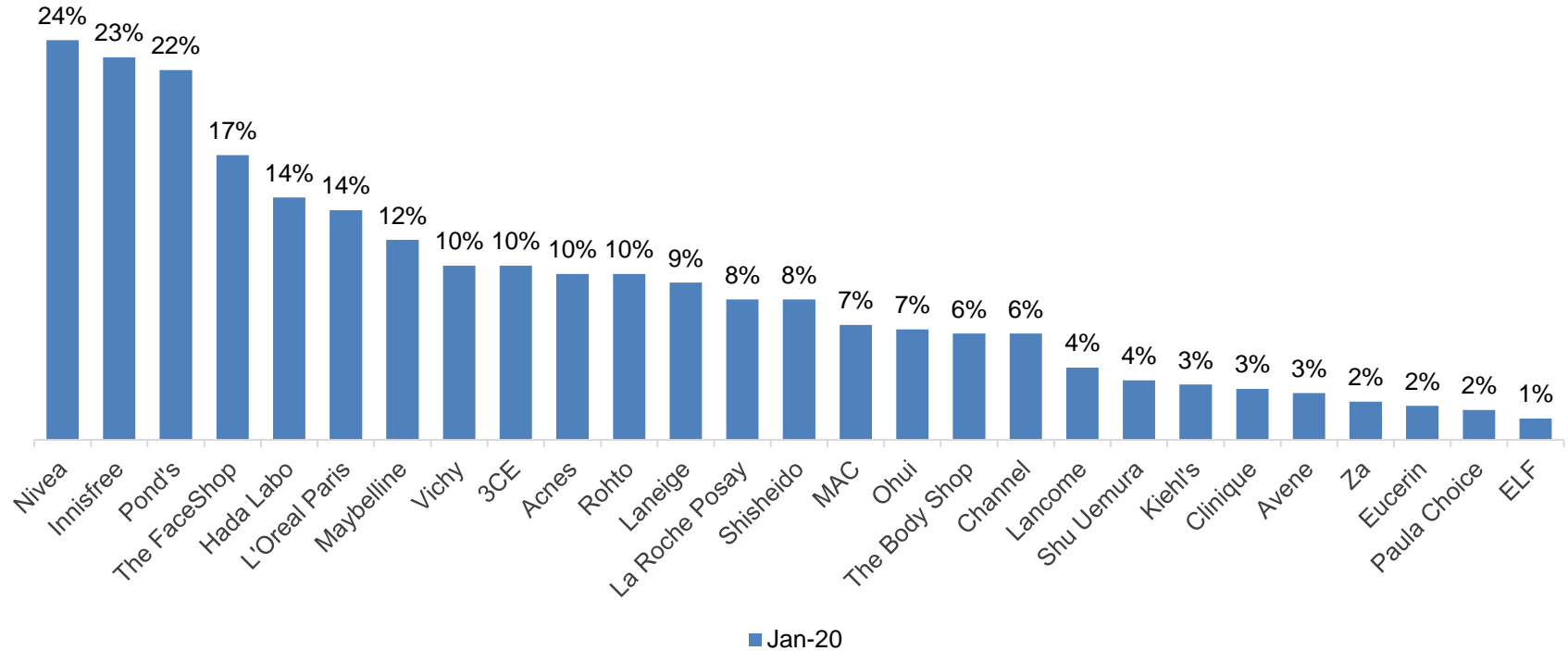
Q. Please choose the beauty brands that you have used?

Favorite brand/ used most often



Nivea is liked by 16-22 years old. 23-29 likes Pond's, 30+ is keen on The Face Shop

Favorite brand/ used most often

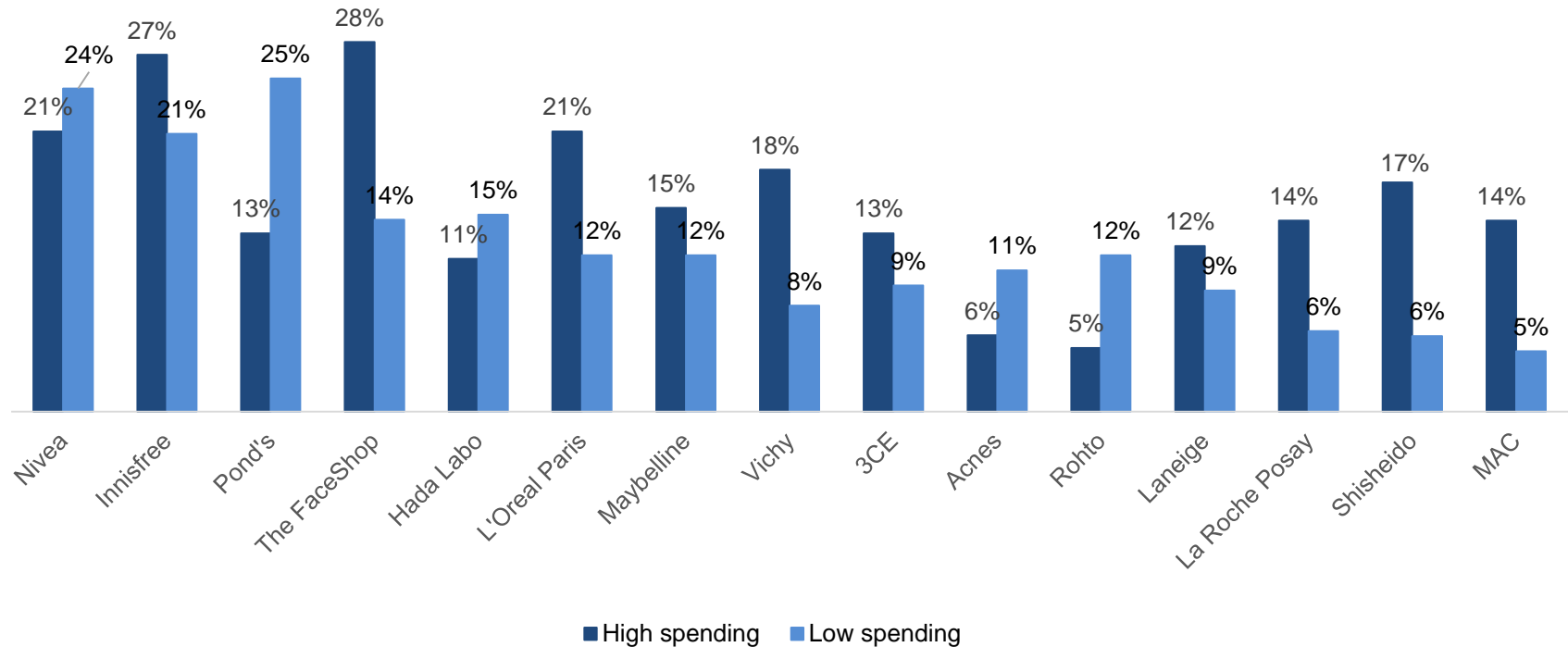


Top 3 most used brands are Nivea, Pond's and The Face Shop

Q. Please choose the beauty brands that you have used?

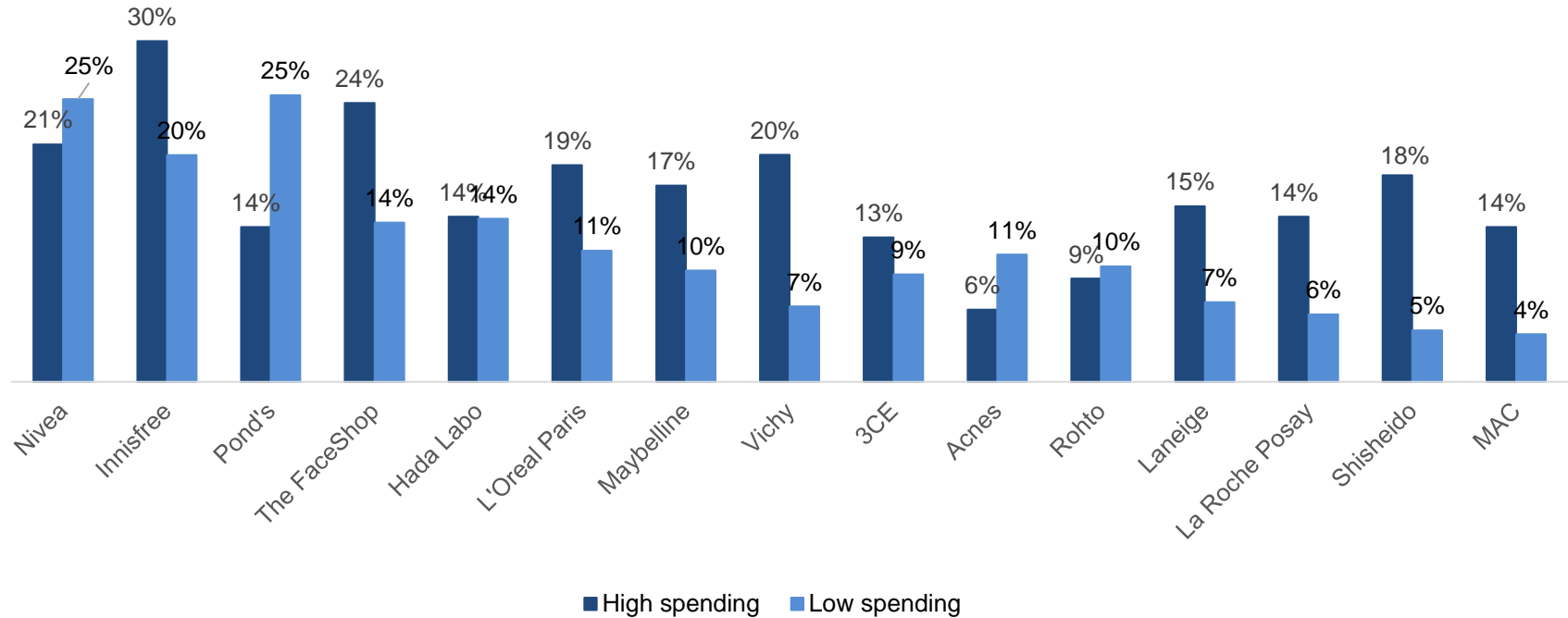


Favorite brands- makeup



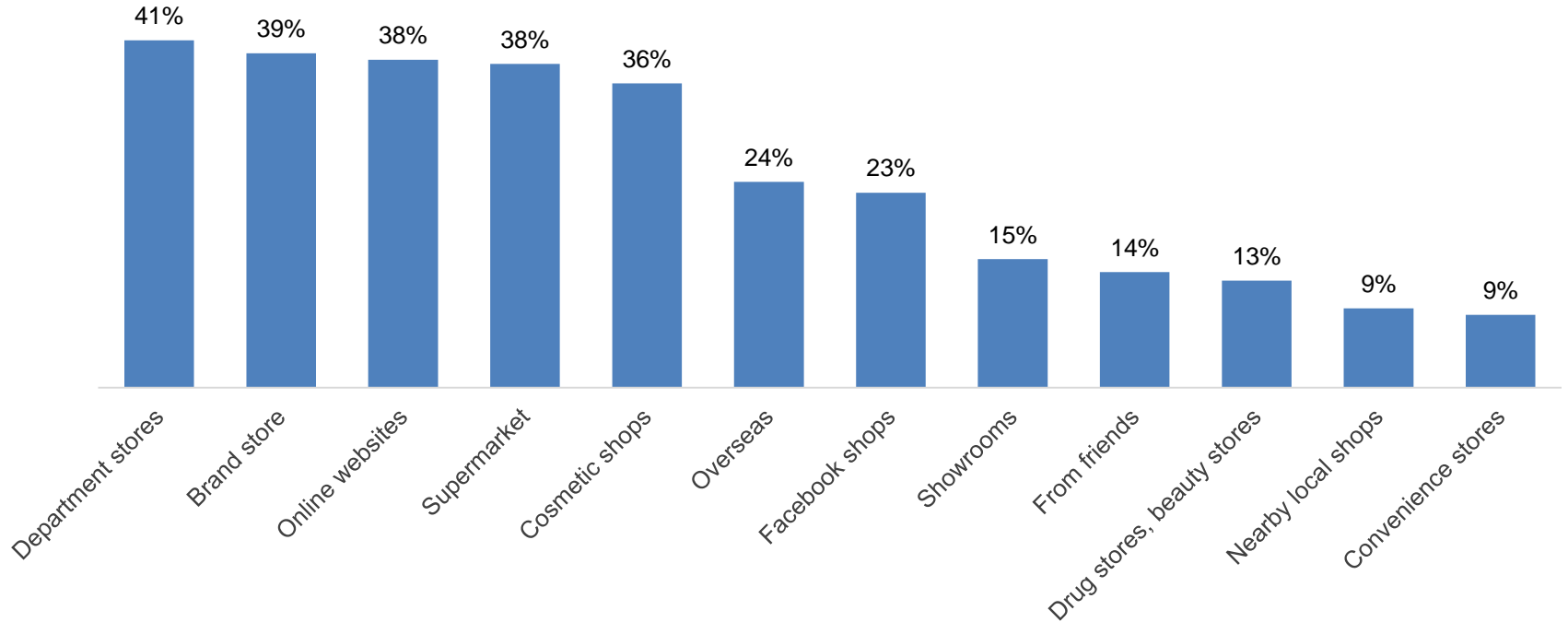
For those who have high spending on skincare, TFS and Innisfree are preferred.

Favorite brands- skincare



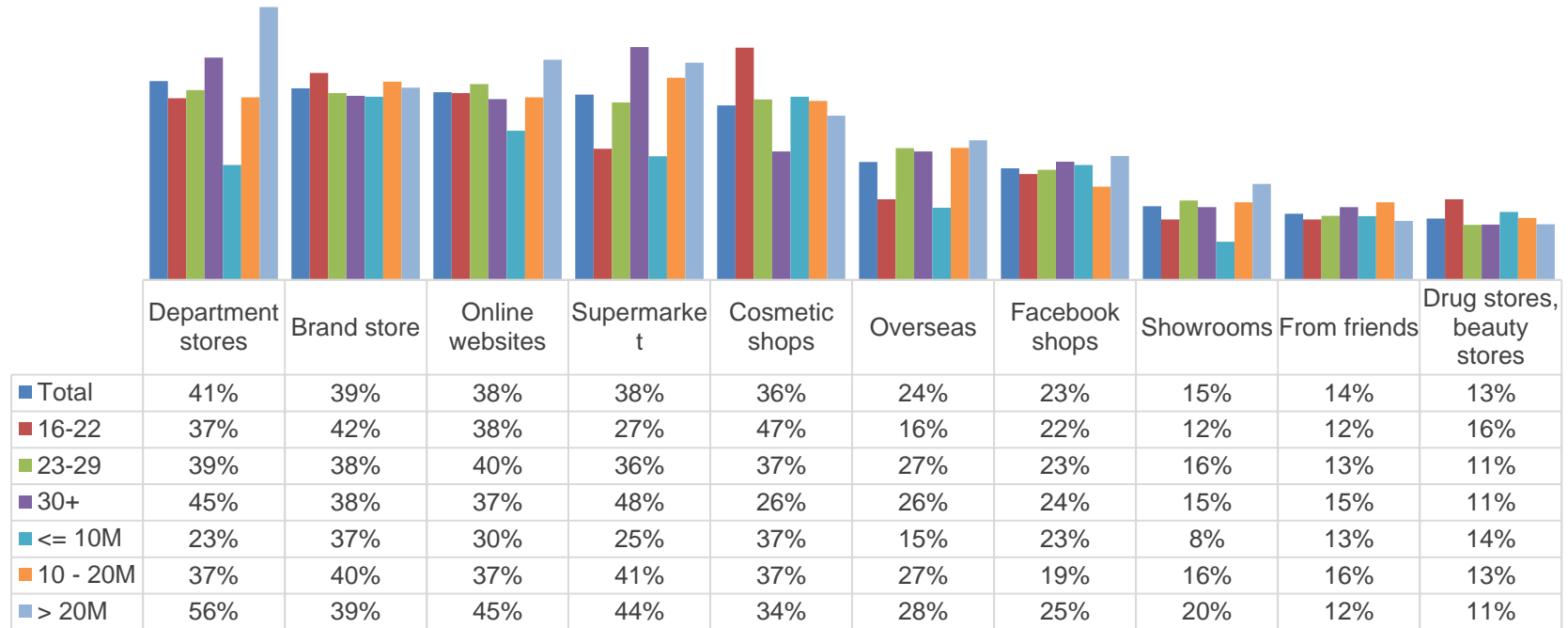
For those who have high spending on skincare, Innisfree is most favored.

Purchase places



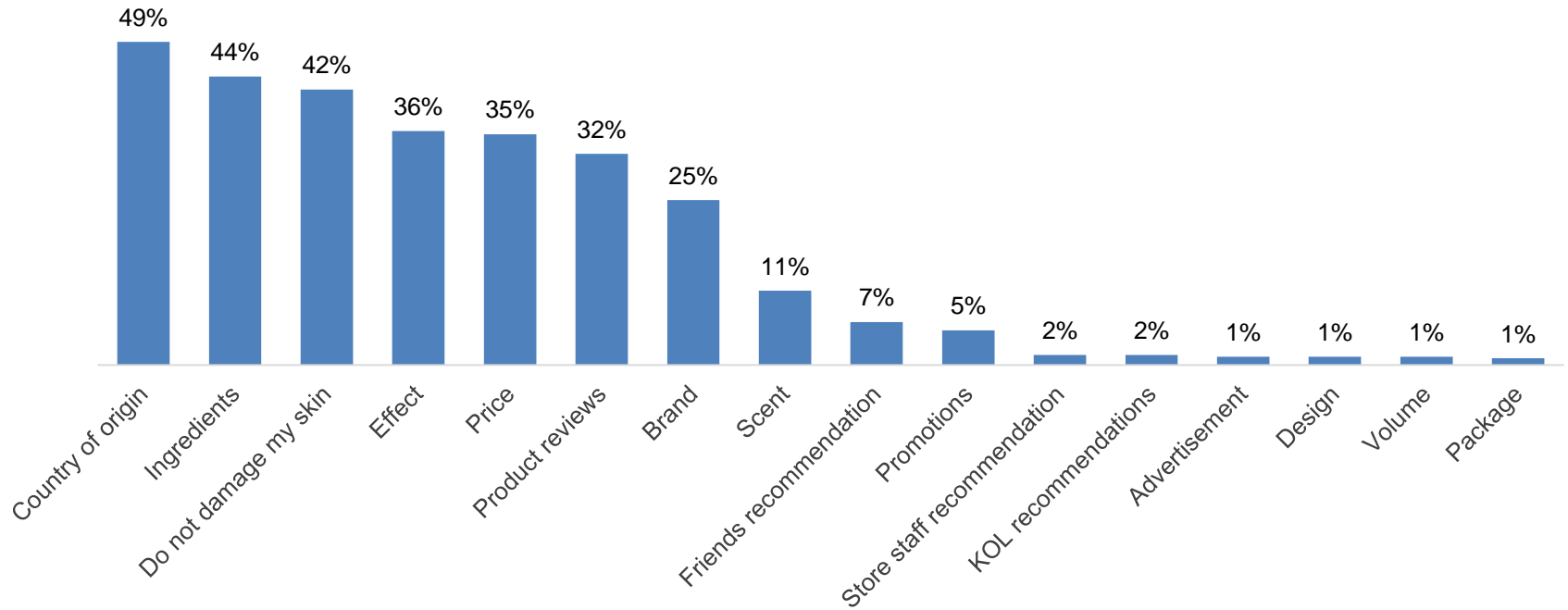
Department stores and brand stores are the most popular places to shop for cosmetics.

Popular purchase places by demographics



While 30+ often buy in supermarkets, 16-22 buy in cosmetic shops. High income people often shop at department stores

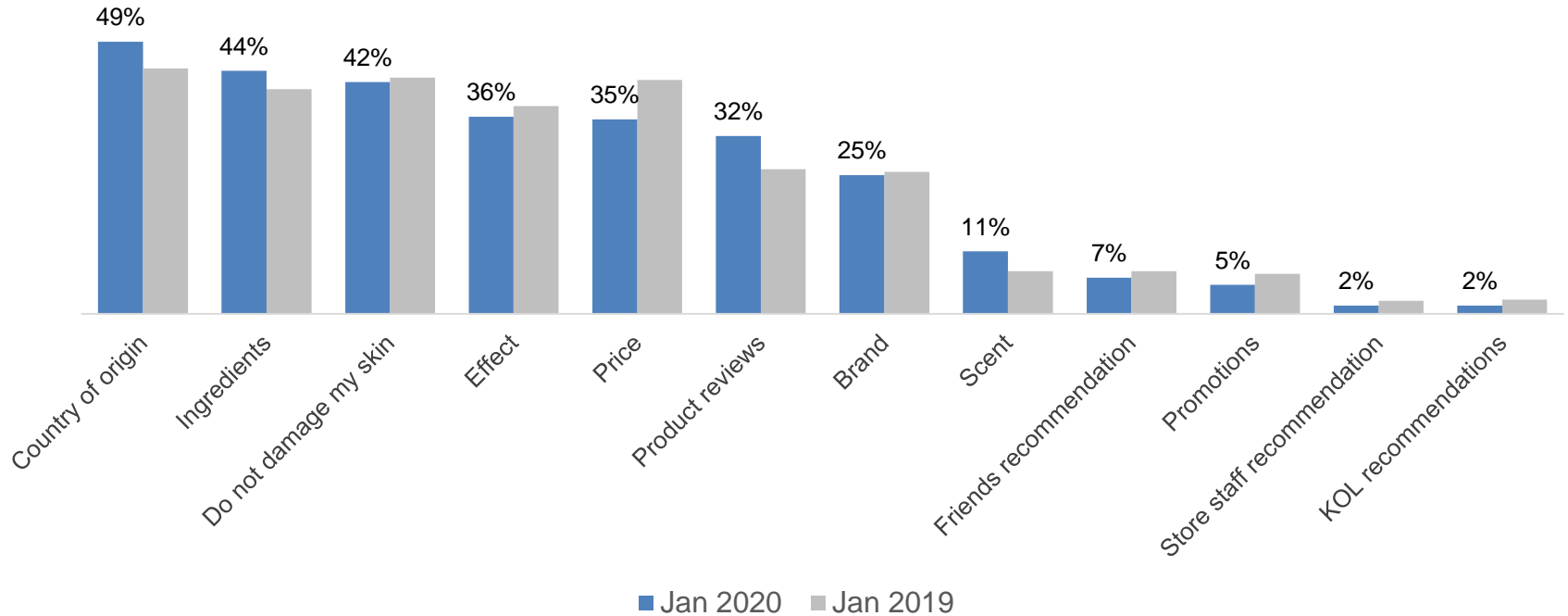
Important factors when buying cosmetic products



COO, ingredients and safety are key factors

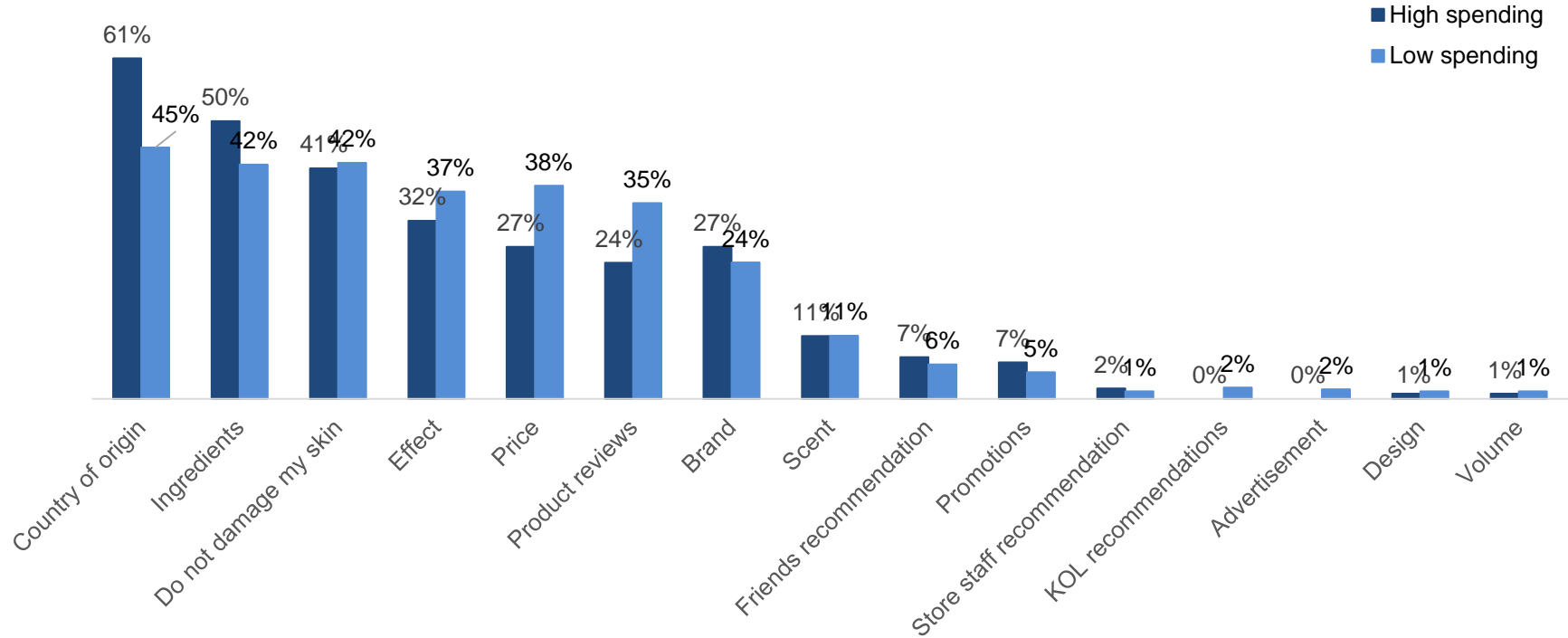
Q. Please choose up to 3 factors that are important when you purchase makeup items

Important factors when buying cosmetic products



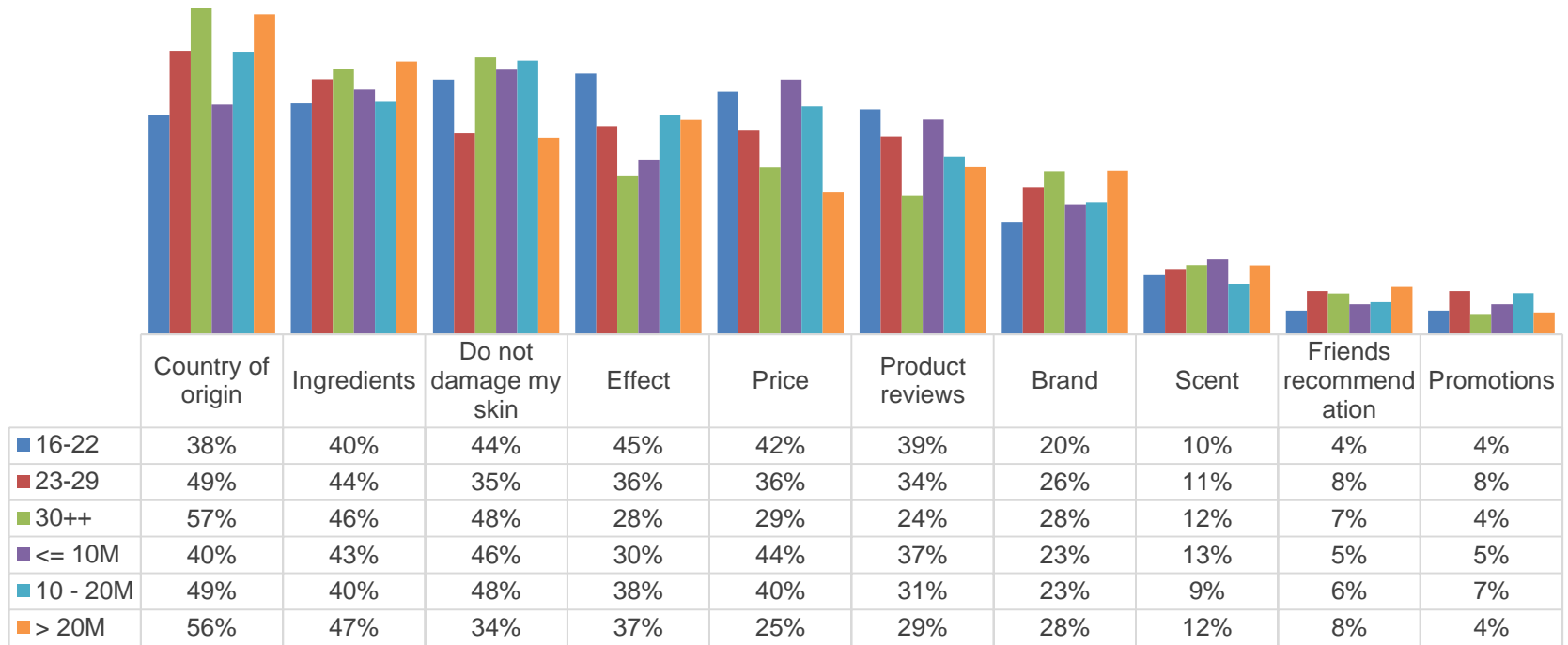
COO, ingredients and safety are key factors

Important factors when buying cosmetic products



High spending users pay more attention on the country of origin and ingredients.

Top 10 factors by demographics

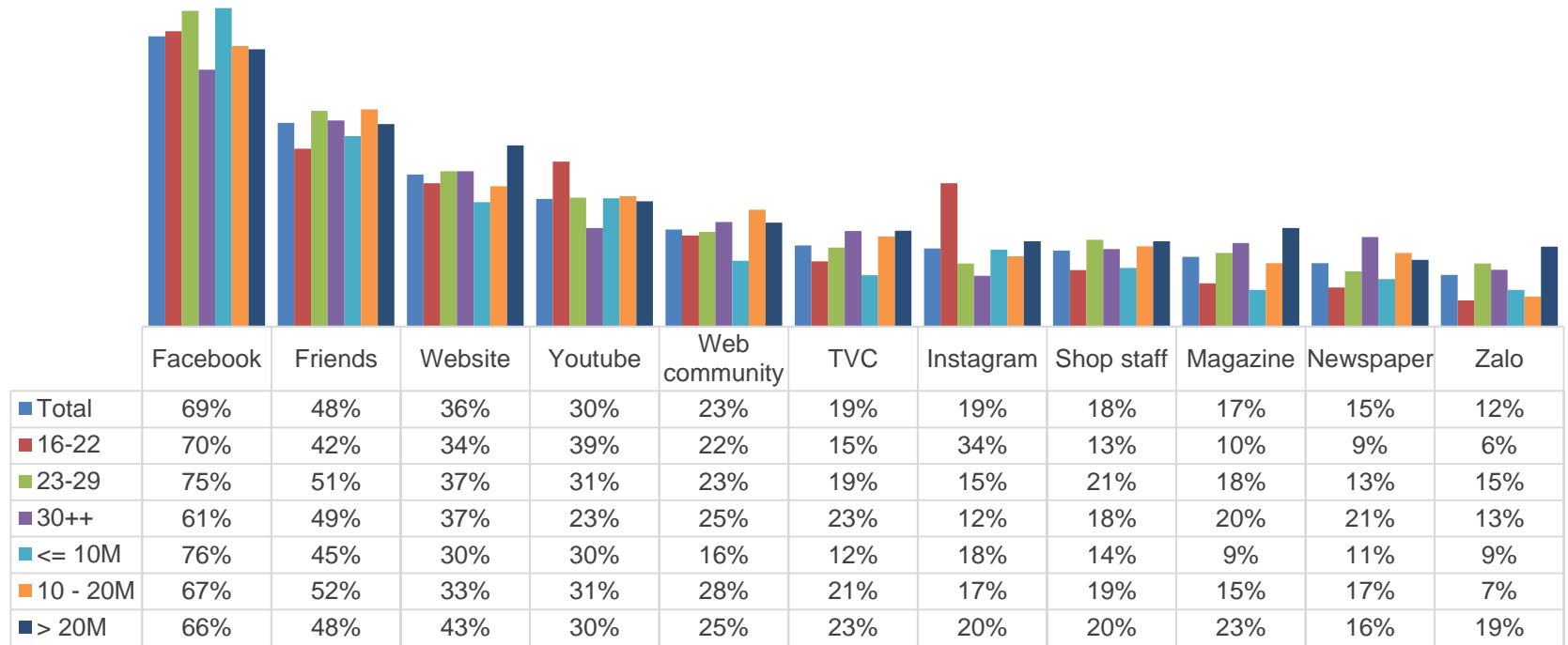


High incomers and 30+ care about COO and ingredient. By contrast, lower income and younger people care safety and price

Q. Please choose up to 3 factors that are important when you purchase makeup items

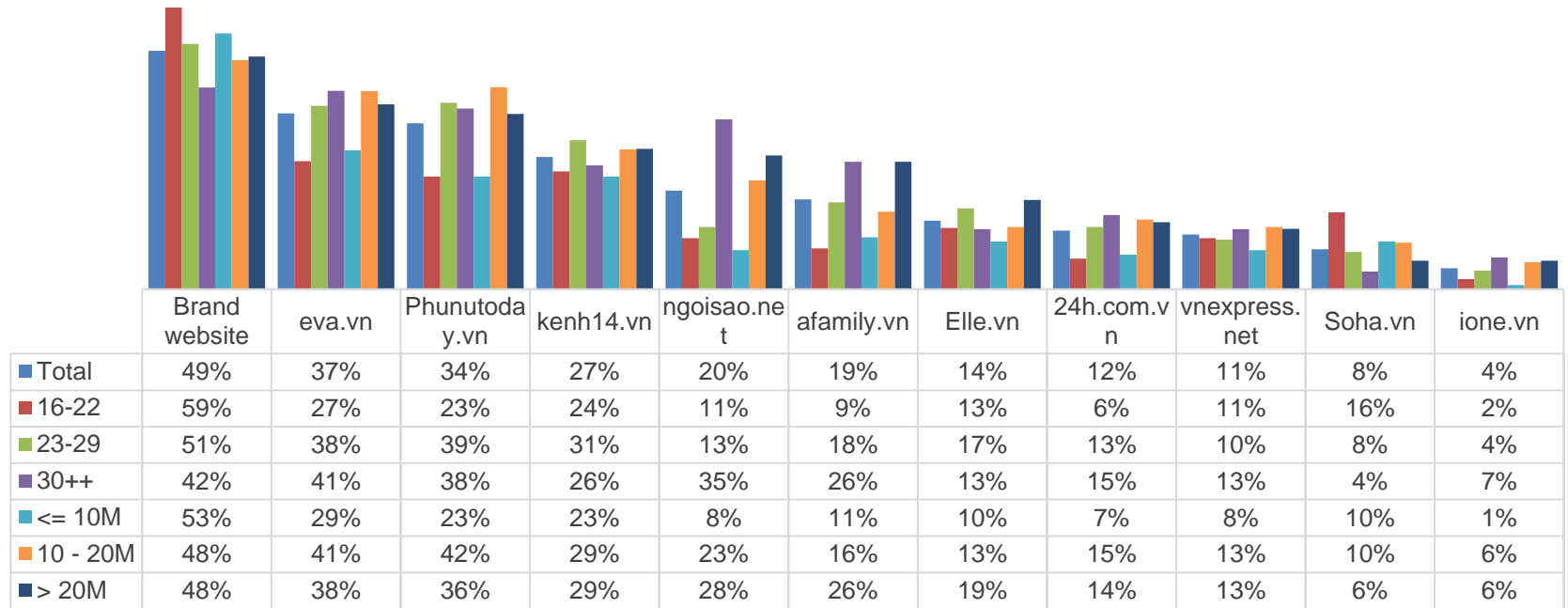


Sources of information



Facebook, WOM and websites are sources to get information about cosmetics

Online websites as a source of information



Brand websites are used as No.1 online site for information, especially in 16-22 years old group

Q. Please choose the online site that you use to update information about cosmetics?

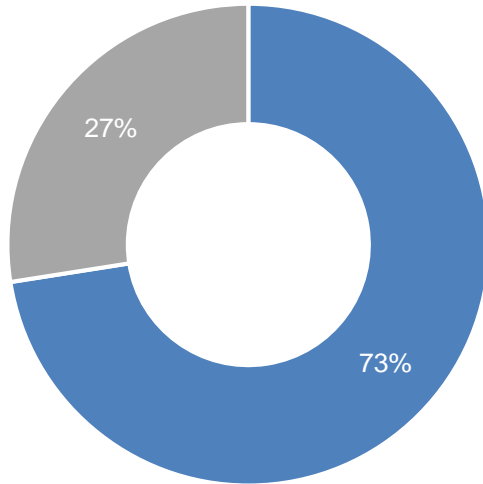




Online cosmetics shopping

Online cosmetics shopping usage

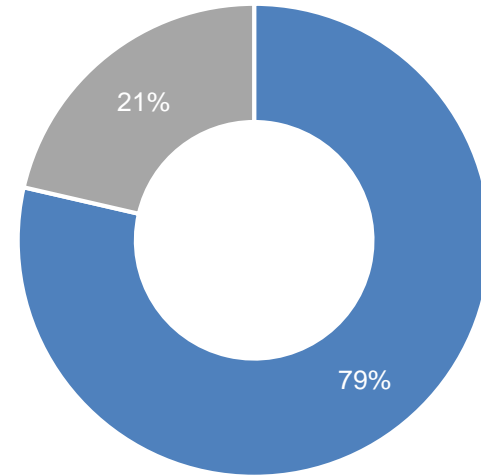
Online cosmetics shopping (N=399)



■ Yes

■ No

Online cosmetic shopping in last 6 months (N=291)



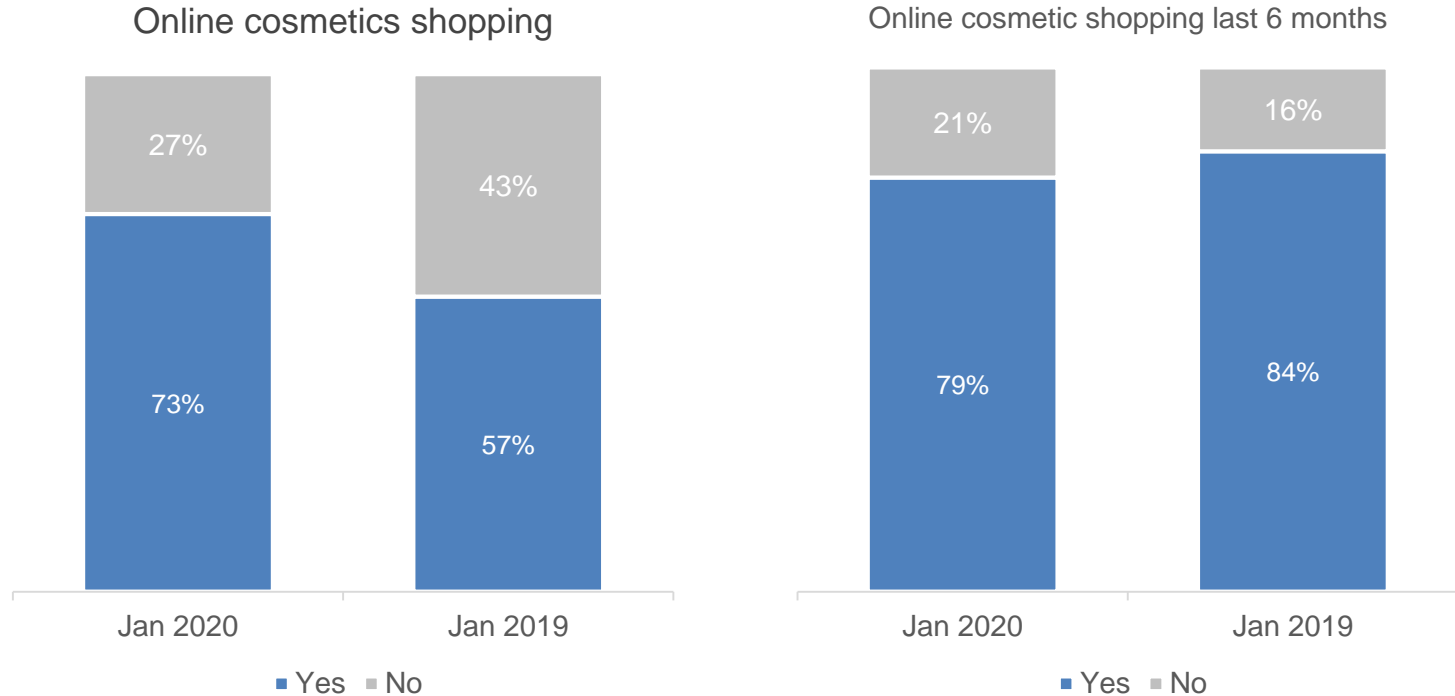
■ Yes

■ No

73% of cosmetic users have shopped online for cosmetics, among whom 79% have shopped online for cosmetics in the last 6 months.

Q. Do you shop for cosmetics online? (N=399) Have you bought makeup products online in past 6 month?

Online cosmetics shopping usage

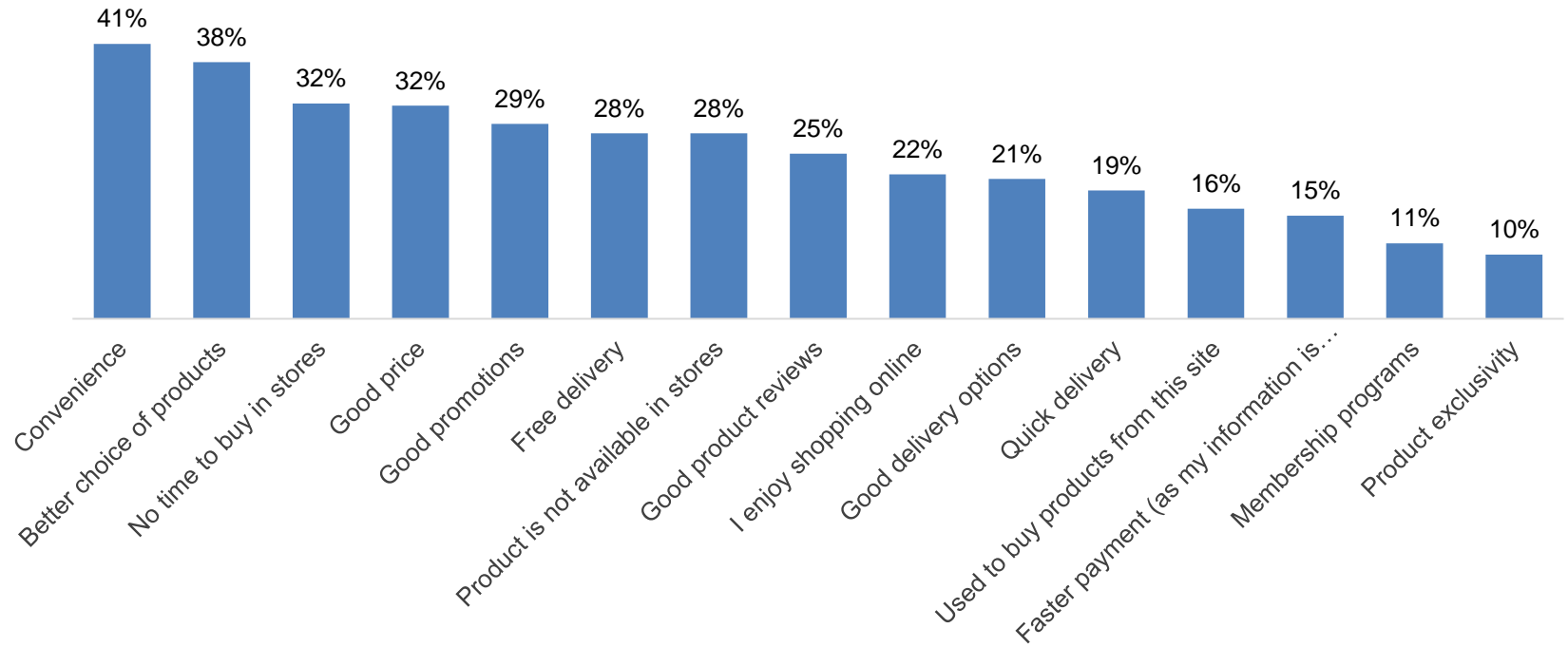


Online shopping is an up trend. 73% of cosmetic users have shopped online for cosmetics, among whom 79% have shopped online for cosmetics in the last 6 months.

Q. Do you shop for cosmetics online? (N=399) Have you bought makeup products online in past 6 month?



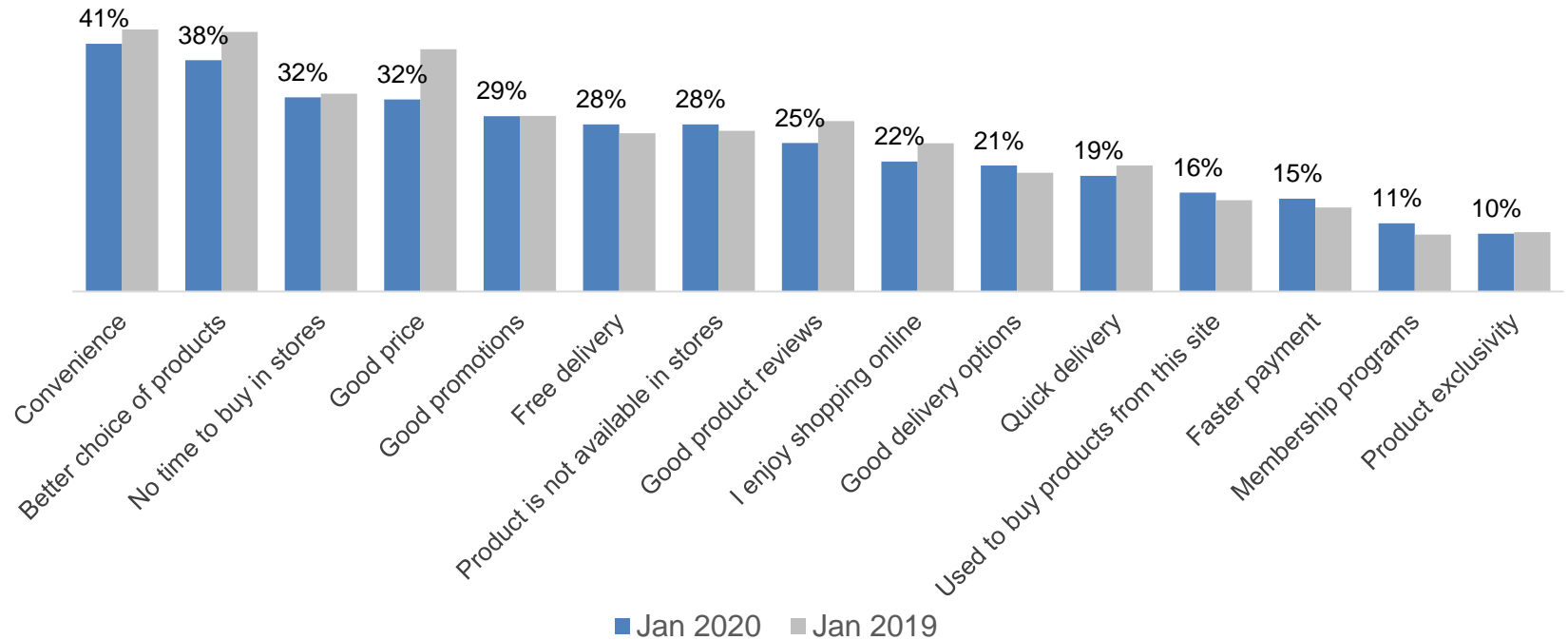
Reasons for cosmetics online shopping



People shop online for cosmetics for the sakes of 'Convenience', 'Better choice of products' and 'Good price'/'saving time'.

Q. What are the reasons that you use online rather than in store?

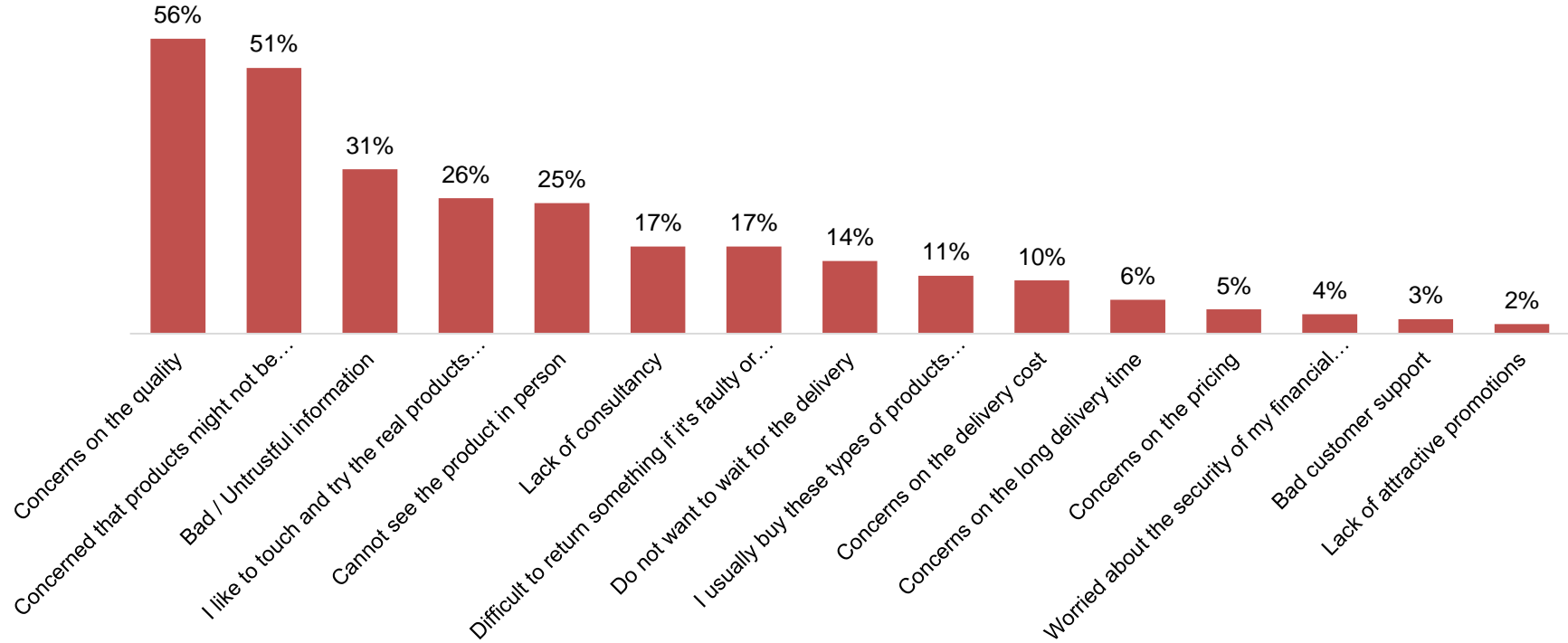
Reasons for cosmetics online shopping



People shop online for cosmetics for the sakes of 'Convenience', 'Better choice of products' and 'Good price'/'saving time'.

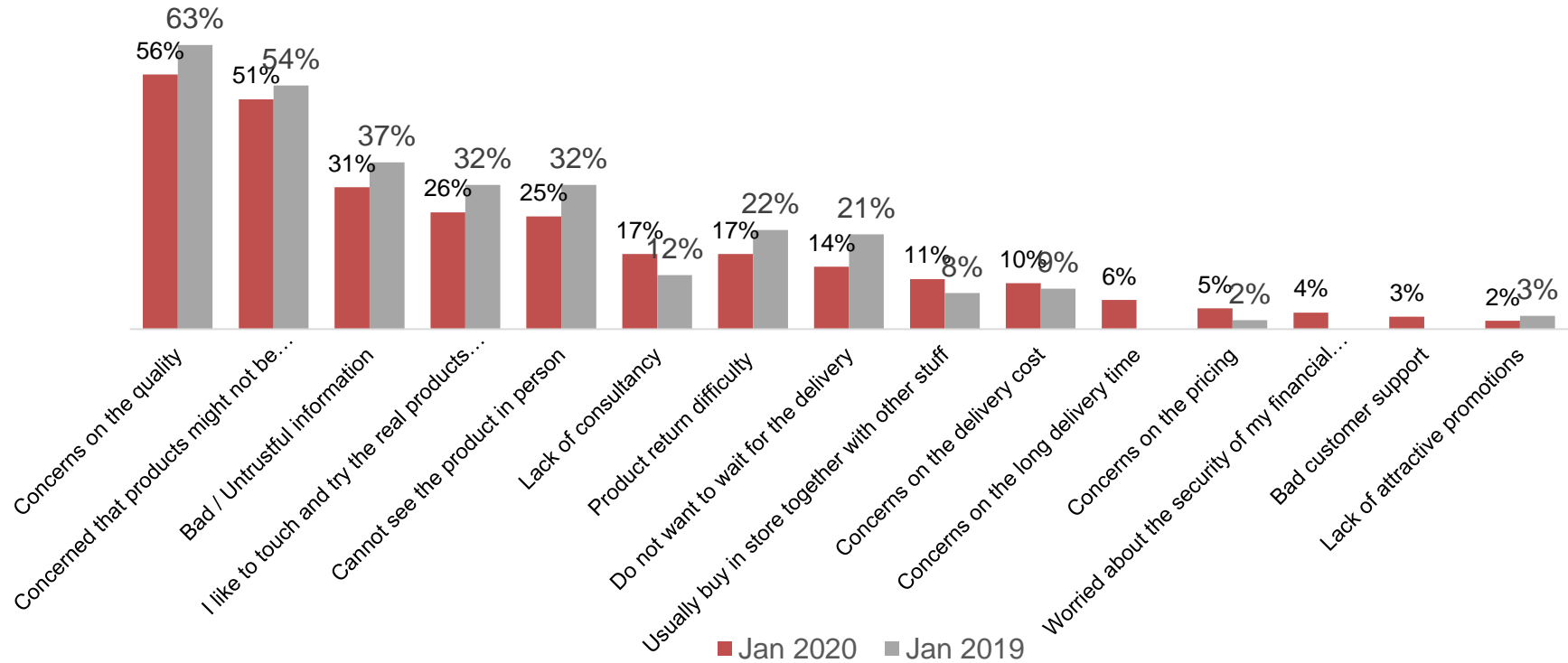
Q. What are the reasons that you use online rather than in store?

Reasons for not shopping online for cosmetics



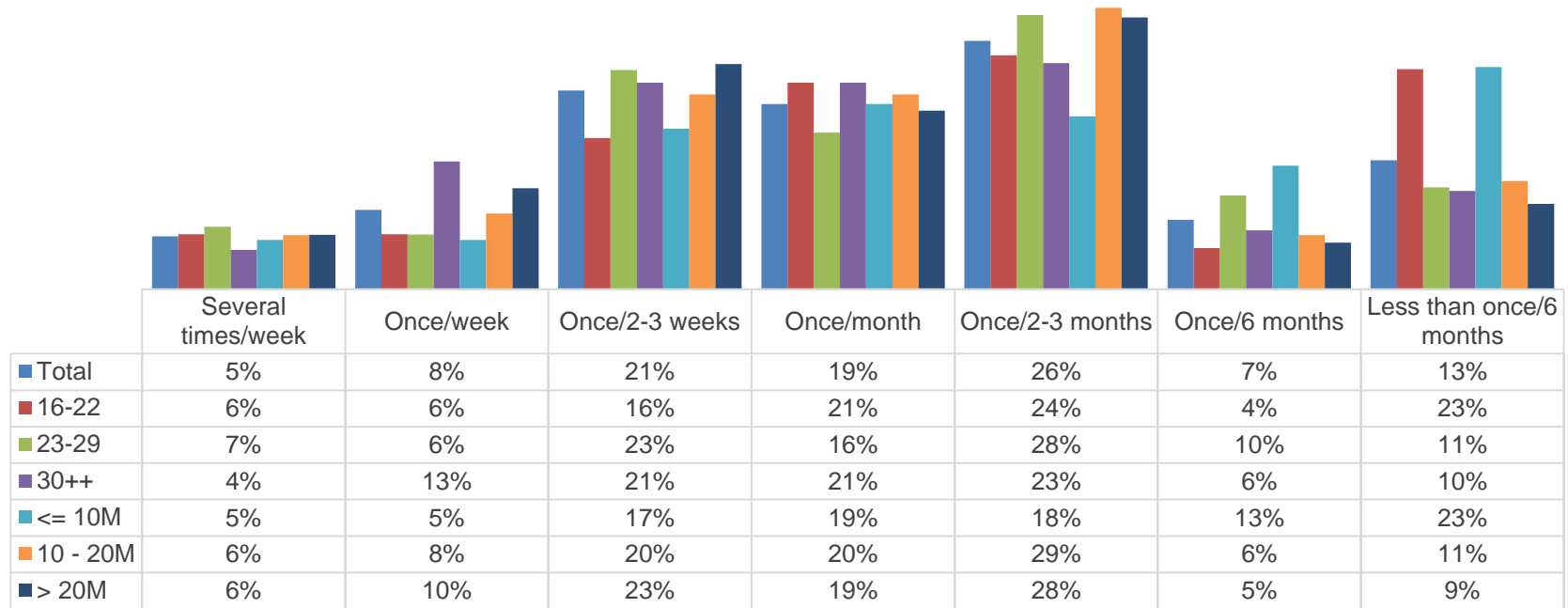
Quality, genuine concern and untruthful information are top barriers

Reasons for not shopping online for cosmetics



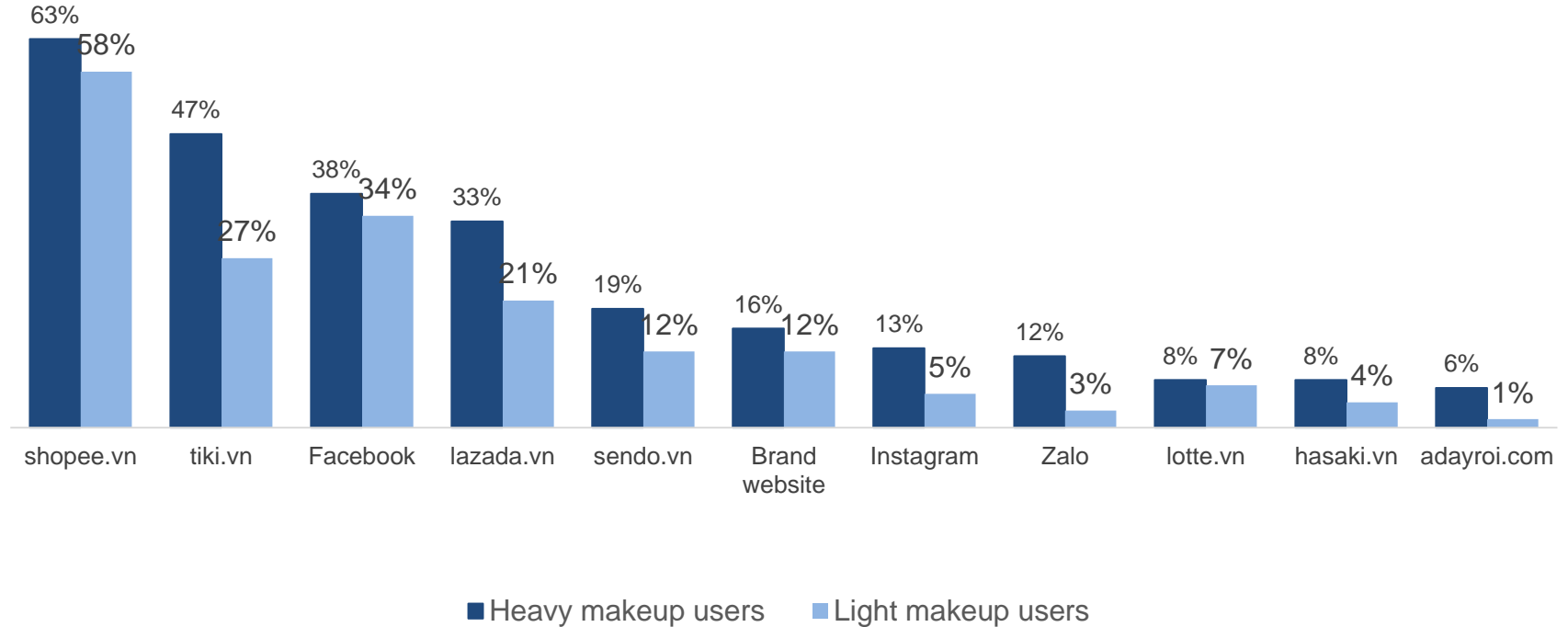
Quality, genuine concern and untruthful information are top barriers

Frequency of online cosmetics shopping



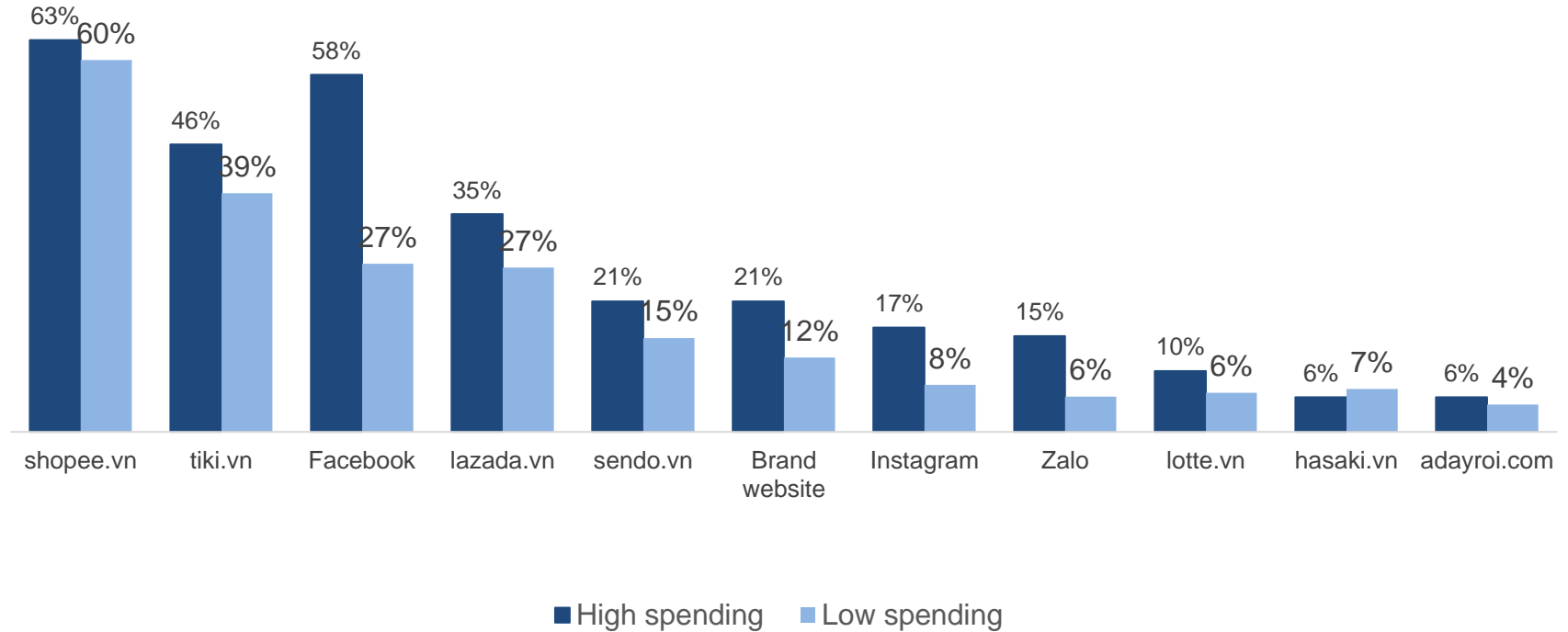
Among those who shop for cosmetics online, most buy once per month or once every 2 or 3 months.

Most popular EC sites



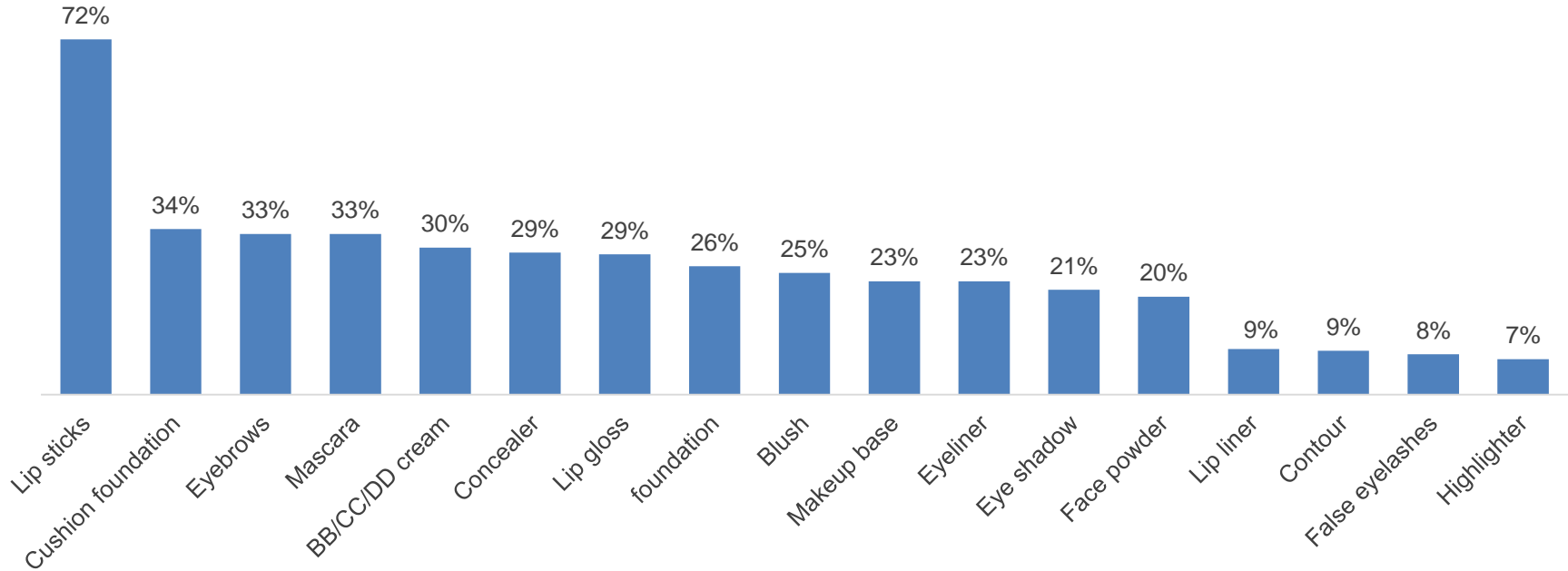
Lipsticks, cushion foundation and mascara are the most online bought makeup items.

Most popular EC sites



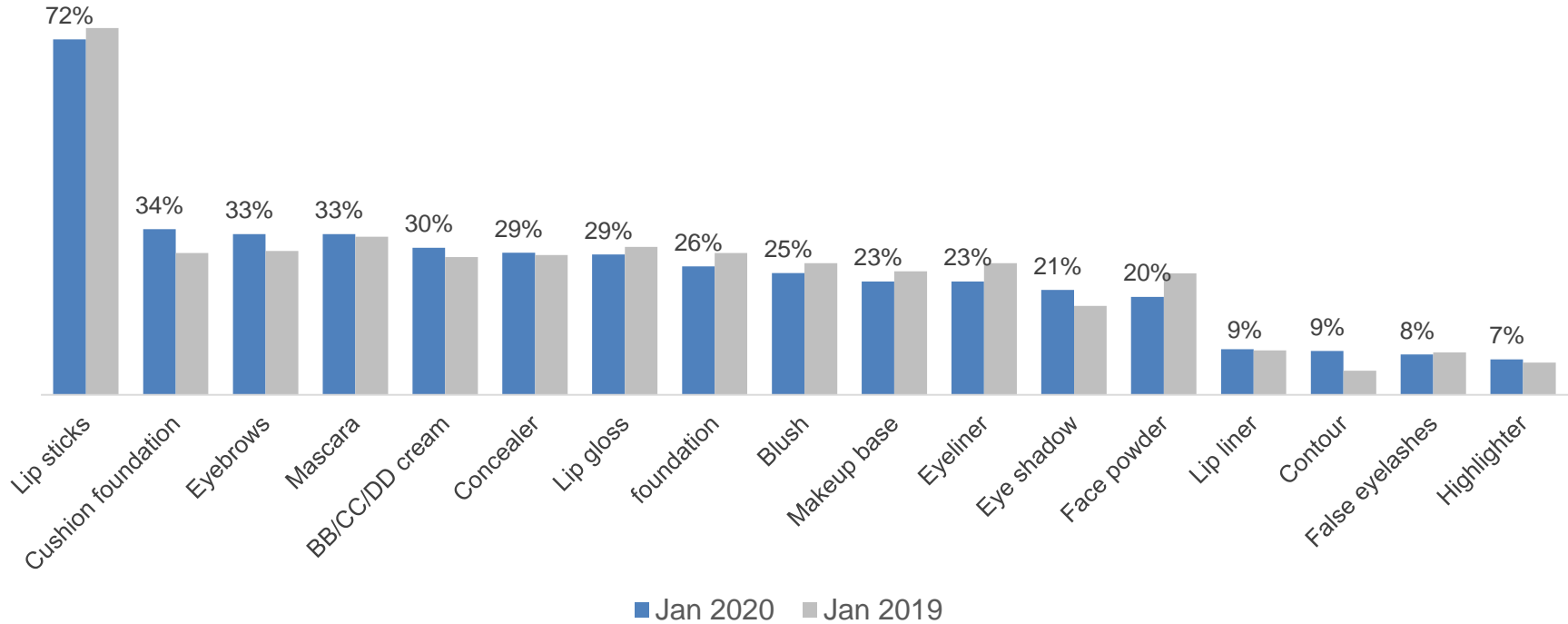
Lipsticks, cushion foundation and mascara are the most online bought makeup items.

Makeup items bought online



Lipsticks, cushion foundation and mascara are the most online bought makeup items.

Makeup items bought online



Lipsticks, cushion foundation and mascara are the most online bought makeup items.

Online brand association

Brands with strong online image

No. 1	 <i>innisfree</i>	(13%)
No. 2		(10%)
No. 3	 NATURAL STORY	(7%)
No. 4		(6%)
No. 5		(6%)

Online stores to shop for cosmetics

No. 1		(25%)
No. 2		(18%)
No. 3		(11%)
No. 4	 since 1957	(3%)
No. 5		(2%)

Q. What brand name comes up when you think about 'online shopping for cosmetics'? What online store name comes up when you think about 'online shopping for cosmetics'?

Online brand association- by makeup spending level

High spending



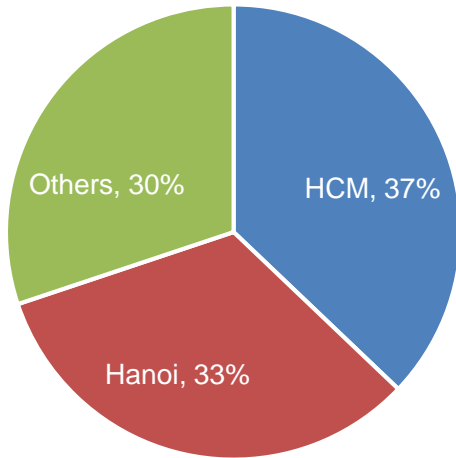
Low spending



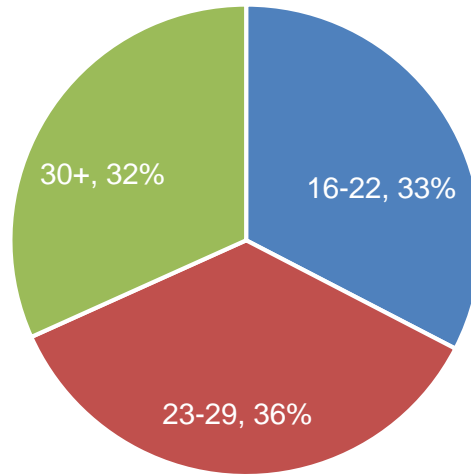
Q. What brand name comes up when you think about 'online shopping for cosmetics'? What online store name comes up when you think about 'online shopping for cosmetics'?

Respondent profile (N=458)

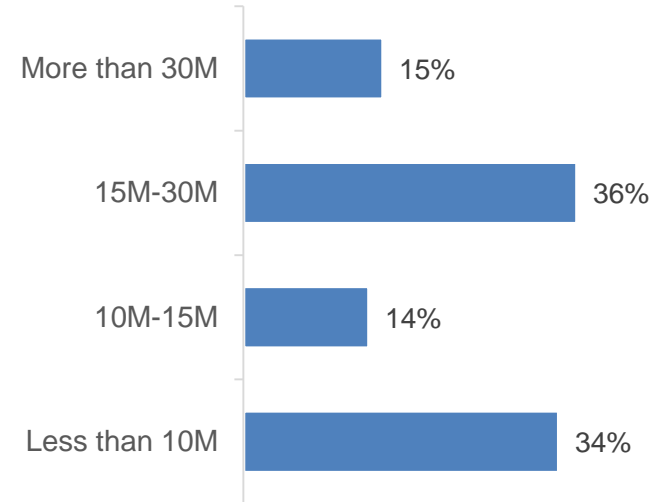
City



Age



Household income





Q&Me – About Online Market Research Services

Our service

We offer the opportunity for you to understand Vietnamese consumers better with technology.



Online market research

Understand consumers quick and deep with over 500K direct Vietnamese panels.



Offline market research

Traditional market research with technology, for better and quicker data collections



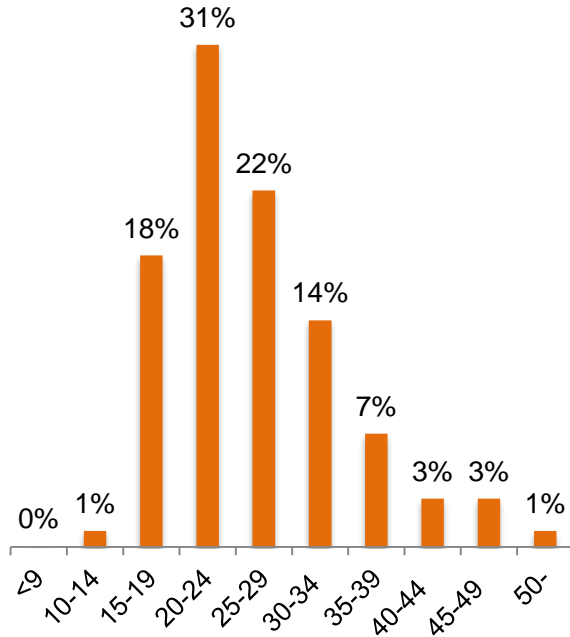
Field marketing app

Cloud-based solutions to ease manual-based operations in the field

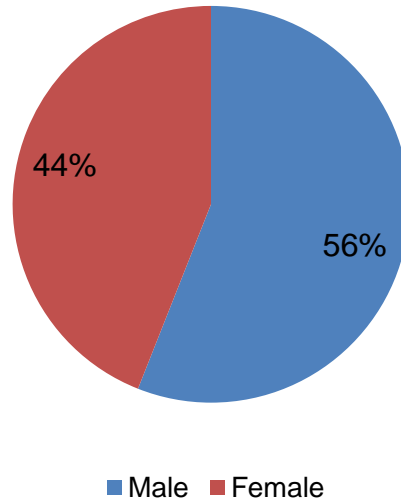
Our advantage: Direct Panel Management

Our strength is **16-39 years old and urban areas**. This is where most biz customers would like to research. **500,000 members** as of July, 2019

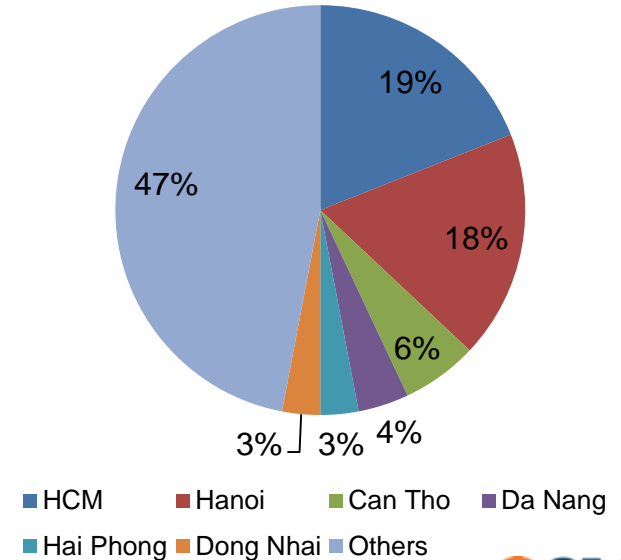
Age



Gender



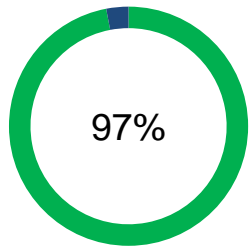
City



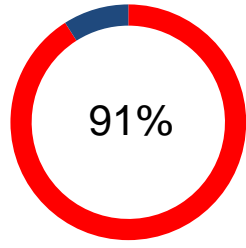
Our advantage – Quick with quality

Online is considered to be “cheap and bad” in general. Q&Me provides several methods providing data with quality

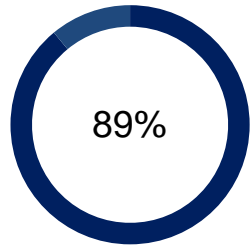
Our quality score by SSI



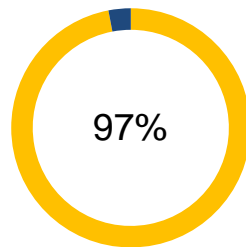
FACT CONSISTENCY SCORE



THOUGHT
CONSISTENCY SCORE



STRAIGHT-LINER/ FLAT-
LINER SCORE



SPEEDERS SCORE

QUALITY CHECK SURVEY SPECIFICATION

N (Sample size)	300
IR (Incident rate)	100%
LOI (Length of Interview)	10 minutes
Success Criteria	Overall score of 80% or higher

THE RESULTS

Overall score	93.5%
Average score in the industry	73%

Our quality assurance process



Questionnaire based on the exact profile

- Refined and very detailed database panel

Take out users with irrelevant replies

- Remove Fake questions hit users
- Remove Contradicted answer users
- Take out straight answer users

Take out speed users

- We count the average median time and take out those who are less than that

Manual check by the experienced researchers

- Our experienced researchers will check the relevance as well as open comments

Re-assortment of panelist priorities

- Based on the survey results, bad users are screened out while prioritizing those who return s good feedbacks.

Contact Us

URL: <http://www.qandme.net>

Contact: info@qandme.net

Q&Me is operated by Asia Plus Inc.

Asia Plus Inc.

Floor 1 25/7A Nguyen Binh Khiem str., Ben Nghe ward, District 1, HCMC,
Vietnam

Tel. +84 839 100 043