



# Chinese Social Media Landscape 2018

**With 40 Brand Case Studies**

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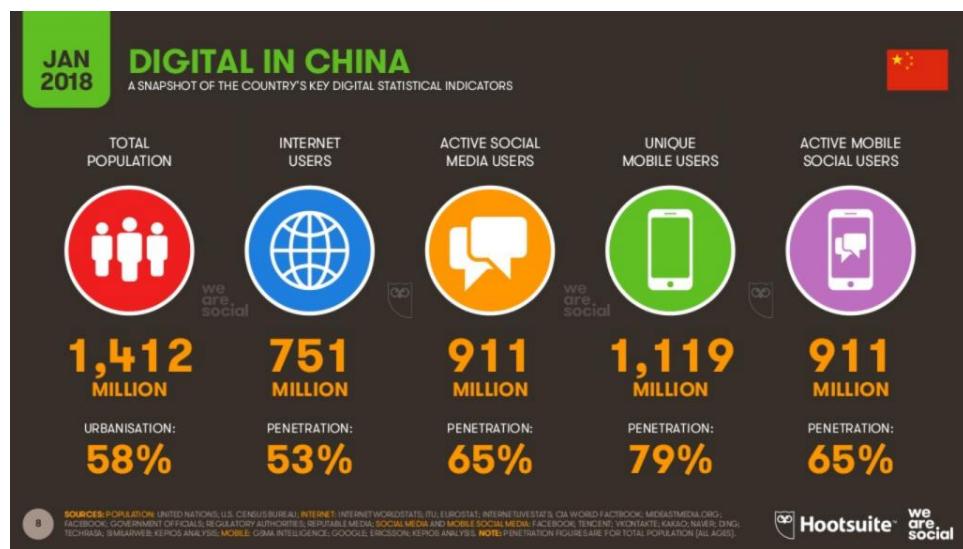
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# Introduction

Chinese social media has grown to unprecedented heights, and the expansion and surge of popularity in its countless platforms from the 2010 to 2020, will be one of the most pivotal and drastic developments for the luxury & social media industry a decade from now.

China has a whopping 911 million active social media users, compared with the U.S. figure of 207 million. The e-commerce consumer spend in China is valued at a whopping \$499 billion USD. The total amount of Chinese e-commerce consumers is increasing every year (581.5 million spenders as of Jan 2018, a 12% YoY increase) and more users are using social media for reference on purchases than ever before (physical stores only makes up for 16% of first awareness, the rest being attributed to social media, press, streams, audio references, and so on). There is no doubt that China's e-commerce market is on an upward trajectory.



With this significant upward trajectory for China's e-commerce market, and with Chinese consumers spending an average of 6 hours every day browsing the

internet, engaging with other users, and looking through hundreds of brands and products every day, there is an overwhelming need for brands to understand the most prevalent apps to connect with these users, and how they can all complement one another to create a powerful brand strategy in 2018.

This all goes into the importance of having a strong understanding of Chinese social media in 2018. But here's the problem: there are hundreds of social media apps in China, with a huge amount having more monthly active users than the entire population of Australia. Where do you start?



We have compiled a detailed and comprehensive guide, going into a dozen of the most important apps in Chinese social media for 2018. This will provide new readers & brands with all the information to get started and will be valuable for experts in Chinese Marketing to touch up on the latest updates about hit apps.

Starting off will be an analysis and look into the functions and statistics WeChat and Weibo, AKA the twin pillars of Chinese social media, followed by live streaming & short videos, the fastest growing trend among affluent young Chinese users. Within this guide, we will discuss Social E-commerce and how it changes the way Chinese consumers decide on the brands to buy from (Xiao Hong Shu/Little Red Book); Chinese Beauty Apps and how it shifts the dynamic for

beauty brands (Meitu); and how using Audio & Video Advertising, companies can bolster brand awareness just that extra bit more (Ximalaya FM and Youku).

By the end of this, you will:

1. Have a thorough understanding of all platforms that will be relevant for Chinese marketing in 2018 and,
2. Discover how each platform can potentially function together to form a cohesive business strategy targeting Chinese consumers

Whether you are completely new, an experienced marketer, or somewhere in between; there is no better place to start than with this library of information.

# Section One | WeChat and Weibo



WeChat and Weibo are regarded as 'the two pillars of Chinese social media'. Halfway through 2018, they boasted a combined total of 1.6 billion monthly active users (MAU), and they have quite literally become synonymous with 'Chinese Social Media'. Therefore, understanding what WeChat and Weibo are, and the different functions they possess, will be at the foremost of any Chinese social media strategy as they will act as the main central of any company's social media presence in China.

## WeChat

### 1. Overview

WeChat is most commonly defined as a Chinese multi-purpose app, which is true. However, to mistake it for just that doesn't do it justice in 2018. Underneath its surface, WeChat is one of the biggest social platforms in the global market today,

boasting unparalleled utility that allows it to function as not so much an instant messenger, but a digital hub providing the equivalent of a dozen apps in one.



- E-commerce functionality
- Creation of Official Accounts that function as business pages
- Services like food delivery, taxi services, booking doctor appointments, or even applying for visas
- Mini programs and games
- Meeting and connecting with strangers through just a shake
- Revolutionary day-to-day mobile payment system in WeChat Pay



## 2. Statistics

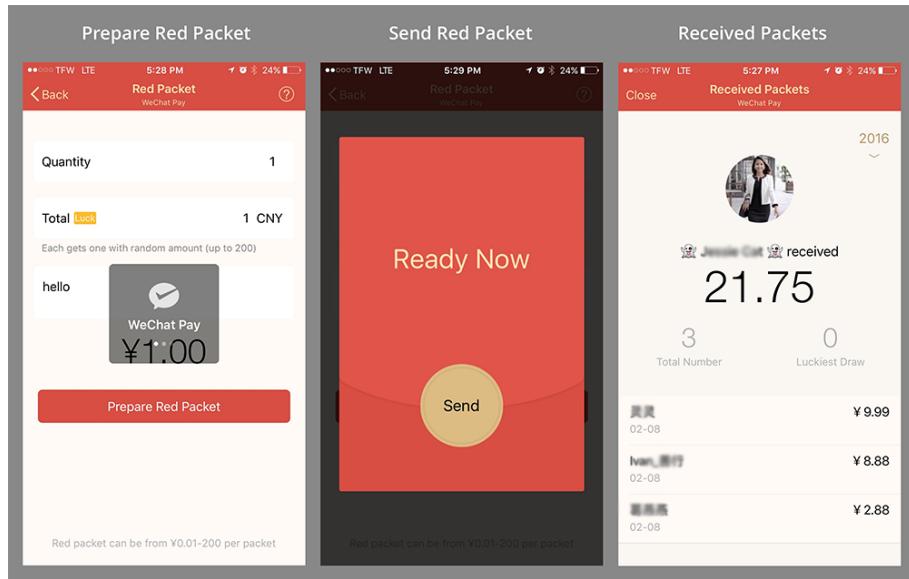
WeChat sits at 1.08 billion MAU, and that figure will only grow with its plans to overtake mobile apps and competitors, by providing mobile users with everything they need inside WeChat. There are 902 million daily active users, and with nearly 90% of users being in China, WeChat falls into a unique position for brands; with a user base that is both massive, and yet targetable all within a single country.

- WeChat had 1.08 billion MAU, and 902 million daily users.
- 100 million international users as of August 2017, meaning 90% of users are domestic
- The ratio of male to female users is 1.8:1.
- 90% of WeChat users are between 18-36 years old.
- A whopping 98.5% of senior citizens in China (50-80 y.o) are WeChat users
- 8 out of 10 smartphone owners in China use WeChat. This increases to 9 out of 10 across tier 1 cities like Beijing, Guangdong, Shanghai and Shenzhen.
- WeChat accounts for 34.0% of mobile app traffic in China, whereas Facebook accounts for 14% in the US
- 40% of WeChat users spend anywhere from 1 to 4 hours on the app daily.

## 3. Analysis

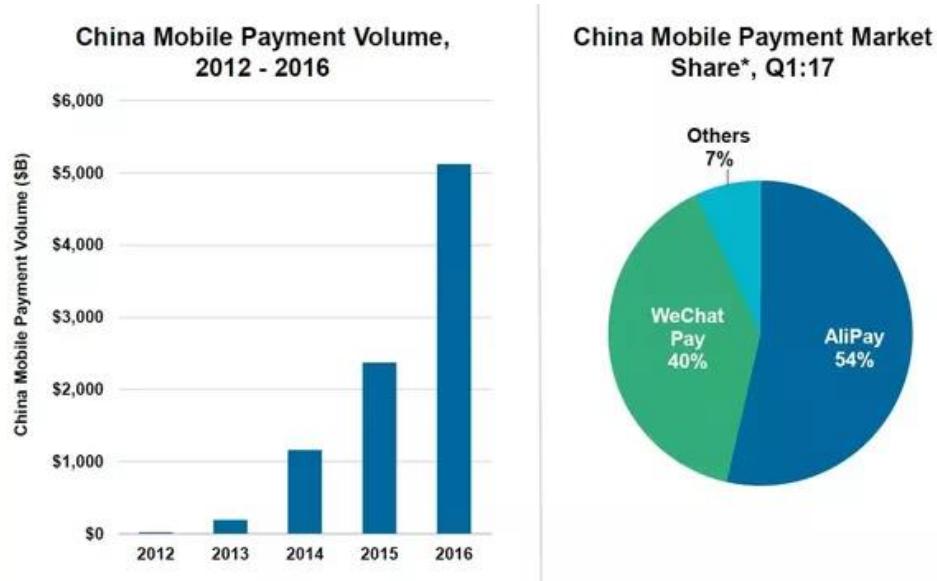
### *WeChat Pay*

WeChat Pay is Tencent's version of Alibaba's Alipay, a payment system that had all but monopolised the mobile payment market in China for a decade. This changed in 2014 when WeChat took Alipay and turned it into their own; a way to let users send digital red envelopes to others.



With this modern twist on a Chinese tradition, along with a flourishing user base, Tencent were able to super charge the adoption of WeChat Pay.

Four years later, it now rivals Alipay with a 40% China mobile market share compared to Alipay's 54% during Q1 2017. WeChat Pay has become one of the defining aspects of WeChat; allowing for seamless transference of money, great opportunities for brands in terms of e-commerce, and integration into physical stores through QR codes. This makes WeChat Pay in itself, one of the more important tools for any brand in China, as it is something virtually all consumers will be using, and with proper implementation, WeChat Pay can increase convenience and repeat sales.



## Official Accounts

WeChat Official Accounts are another integral part of WeChat. OA can be likened to Facebook or Twitter pages, allowing brands to have their own 'hub' in which they can publish articles, talk with followers, and more. While OAs can look bland and similar, the interfaces can actually be customised heavily, becoming more alike to a website or app.

Furthermore, all WeChat OA (currently 20 million registered WeChat OA) are equipped with at least one basic bot from the get-go to improve and streamline communications between company and customer. This is exceptional compared to Facebook, where in 2016, only 11,000 business pages had a chat bot, and a lackluster one at that.

There are two main types of Official Accounts; Subscription Accounts and Service Accounts.

- Subscription accounts are usually used as a daily news feed, where companies can push 1 new update a day to their followers. While this is often a single article, it can also be multiple articles bundled together into a larger news update.

- Service accounts lack the daily update allowance and are limited to just 4 updates per month. However, this comes with several other advantages. Service accounts have access to a wider range of features than Subscription accounts, such as taking payments, 'shake' or using WeChat coupons.

Official Accounts will be the most important part of WeChat that brands will need to know about. It is the sole reason to why WeChat will act as a central hub for a company's social presence in China. Throughout this guide, there will be many aspects of the Chinese social media landscape discussed; from working with KOLs, to live streaming to social E-commerce and more. However, among all that, WeChat will still remain the center point. This is because, all followers and conversions gained through any other Chinese app, will eventually lead back into WeChat as it is the main app of China. Thus, the WeChat Official Account typically becomes the main source of information for users to rely on and check in with.

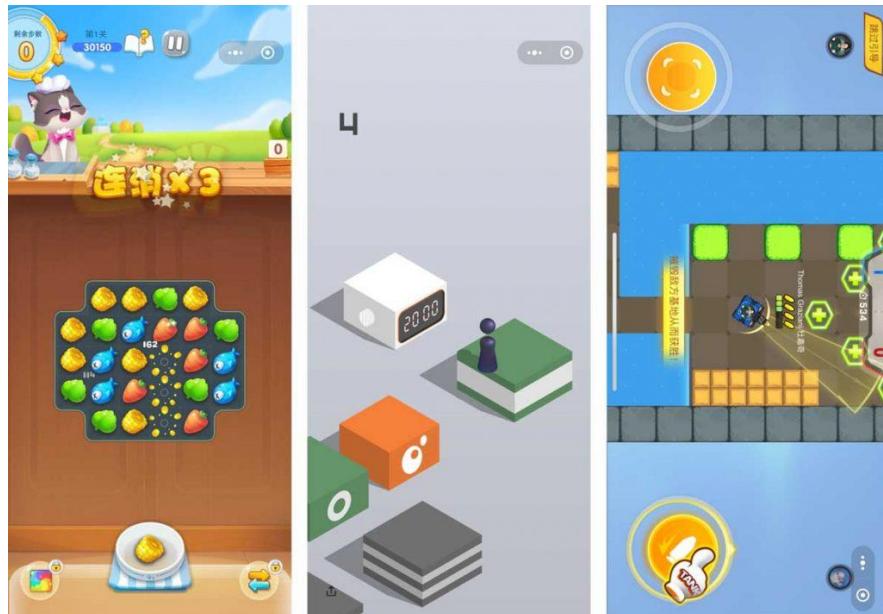
### ***Mini Programs***

Mini programs are apps embedded within WeChat that are accessible without any installation or download. These apps can be used for a wide range of purposes, from e-commerce, task management, quality of life and more. They have become one of the biggest disruptors in China's social media and e-commerce sector in 2017 and have been used to great success by luxury brands like Gucci, Michael Kors and Fendi.

- Tesla has a mini program enabling users to locate charging stations, schedule a test-drive and share their experiences about driving a Tesla car.
- Michael Kors launched a mini program focusing on improving the consumer's offline journey with online care by allowing the consumer to check shopping details in real time, review the experience and get after-sale service benefits.
- French Luxury brand Longchamp has an online customisation boutique mini program that allows users to create unique Longchamp bags with their choice of colors, badges and imprints.

## ***Mini Games***

In January 2017, Tencent rolled out mini games, a feature almost identical to mini programs. Within months, millions of users were hooked. This has provided an avenue for developers and brands to share games on WeChat in order to generate publicity and traffic.



As of 2018, according to research firm QuestMobile, one of WeChat's most popular mini games Tiao Yi Tiao has accumulated 390 million Chinese players, which is staggering considering China has a total gaming population of 583 million and the entire US population is just 325 million.



For a better comparison, the '*Pokemon GO*' craze that took the entire world by storm in 2016, had 27 million users during it's peak. WeChat's Tiao Yi Tiao mini game has gone well over 10x that figure, and all within a single country. Furthermore, it is only one of the dozens of mini games that WeChat has released so far. Therefore, mini games will become an effective addition to any WeChat business strategy looking to appeal to a younger, and tech savvy demographic in China.

### ***Givenchy's partnership with KOL***

Givenchy is a French luxury fashion house was able to combine KOL influence and luxury consumer behavior to sell 1.2 million RMB worth of products in just 12 minutes. In February 2017, Givenchy used WeChat to promote an exclusive limited edition handbag through the help of Mr. Bags (Tao Liang), a Chinese KOL with a WeChat following of 1.2 million at the time of the campaign.

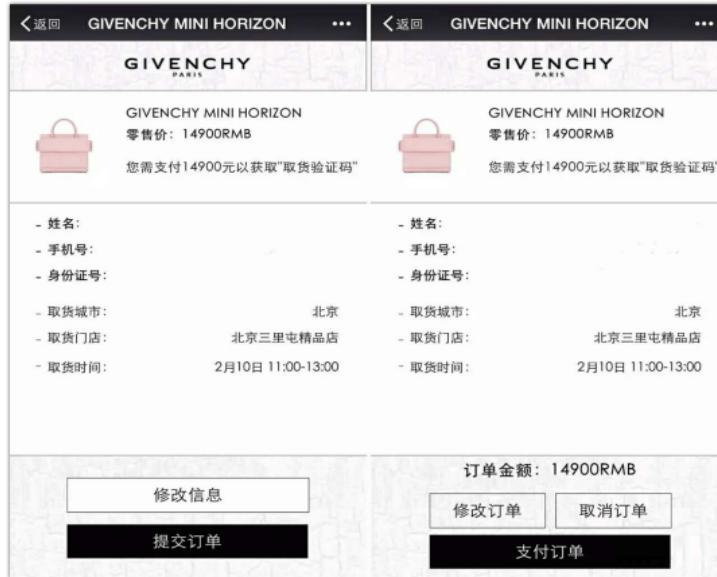


Mr Bags has a highly relevant and fashion-oriented community and has built his following since 2011. As such, the partnership was ideal for Givenchy to promote their new handbag.

On the 10th of February of 2017, a post was published on Mr Bags' WeChat account. The post referenced the partnership with Givenchy, and advertised 80 exclusive limited edition Mini Horizon pink handbags. Within just 12 minutes, all 80 handbags were sold, for 15,000 RMB each (about \$2000-3000 USD) and in total, netted about 1.2 million RMB, which was approximately 200,000 USD.



The campaign was a success because Givenchy was able to leverage the prestige and exclusivity that the limited edition bags would present. The key factor to the bags' prestige and exclusivity lay in the limited quantity of bags that Givenchy were offering and the time frame it was being offered in (only 2 hours before the campaign would conclude), giving a sense of urgency along with bragging rights to anybody lucky enough to purchase one in time. This was fundamental to positioning the bags in the eyes of consumers, as an ideal investment that should be purchased asap.



Along with the commendable integration of prestige positioning and KOL influence, Givenchy's 80-handbag WeChat campaign also integrates purchasing behavior with timing and seasonality. The campaign was initially posted on WeChat on the 10th of February, just a few days before Valentines Day. Chinese consumers are known for being more inclined to purchase gifts for others during special occasions. Givenchy takes advantage of this trend, by ensuring the post of the campaign is ideal and easy for ladies to re-post and share.



## WeChat - Longines

Longine is a swiss watchmaker that launched a Chinese Valentine's Day campaign. The campaign involved an article with a nice message about love: "True love is all about the companionship". The content of the article was formatted with H5, allowing for a more immersive and quality experience.

The article was kept simple, describing how Longine's watches are made with love and so on. It went on to display beautiful watches from three different collections. As such, though the content is simple, it manages to engage readers with the Valentine's Day theme while also giving the brand a way to freely educate users on their brand.



## Twist & Drink building Brand Image

How do you stand out in the Chinese market and engage over 250,000 users starting from scratch? Twist & Drink is a beverage company that through brand image building, WeChat mini games, and WeChat e-commerce, was able to do just that. Twist & Drink is a child friendly Austrian beverage brand created far back in 1973. China was a flourishing opportunity for this beverage brand, with a massive population of 1.4 billion, along with the single child policy having been recently lifted, however entering into this foreign market, they had practically no reputation.



The brand began by positioning themselves on several social networks, like WeChat, to promote their products through simple social media marketing. As Chinese users spend an average of 6 hours on the internet, it made for a valid strategy for Twist & Drink to launch out as much content as possible to reach and build their brand image in the minds of parents.

With the use of HTML5, the brand was able to develop an interface that allowed parents to connect and understand their vision. Within their WeChat interface, bottles were given personalities and characteristics, and became mascots that spoke

directly to mothers in China. This also allowed children to recognise themselves in the mascots.

Along with this, the brand would also launch a game on WeChat through the mini game function. With China's gaming population of 583 million, this was a powerful decision that would ultimately lead to Twist & Brand's recognition and popularity. The Twist & Drink game involved players competing to collect the most points in an arena. Over 10 000 players joined the game per day which was linked directly to their official account. This was combined with sharing content posts every day.



With Twist & Drink finally gaining a steady stream of followers within China, they launched their WeChat store, allowing parents to purchase their products directly from the app. Online, they now have exposure to over 250,000 WeChat users, and an average of 600 views on posts. On the physical front, Twist & Drink is now stocked in most local premium stores in Shenzhen, Shanghai, Guangzhou and Beijing, and are connected with several quality local distributors.



## Starbucks

As a celebration to their newest addition to their line-up of beverages, Starbucks launched a WeChat campaign in 2012, combining customer engagement with WeChat's QR code functionality. Starbucks placed QR codes in their brick & mortar stores, so that users could scan and add Starbucks as a friend on WeChat. Fans would then be invited to send WeChat any emoji expressing their mood, which WeChat would respond with an appropriate song chosen from a specially created playlist in correspondence to the user's mood.



Over 4 weeks, Starbucks gained 130,000 WeChat friends, and sales volume for Refresha hit 7.5 million RMB in just three weeks. All this was accomplished on a budget of just 250,000 RMB.

### ***DAMAC Properties***

DAMAC is a real estate company in the middle east and Dubai. They focus on providing their clients with unique living concepts as well as dream homes. WeChat opened up avenues for them to double down on branding, and lead generation in China.



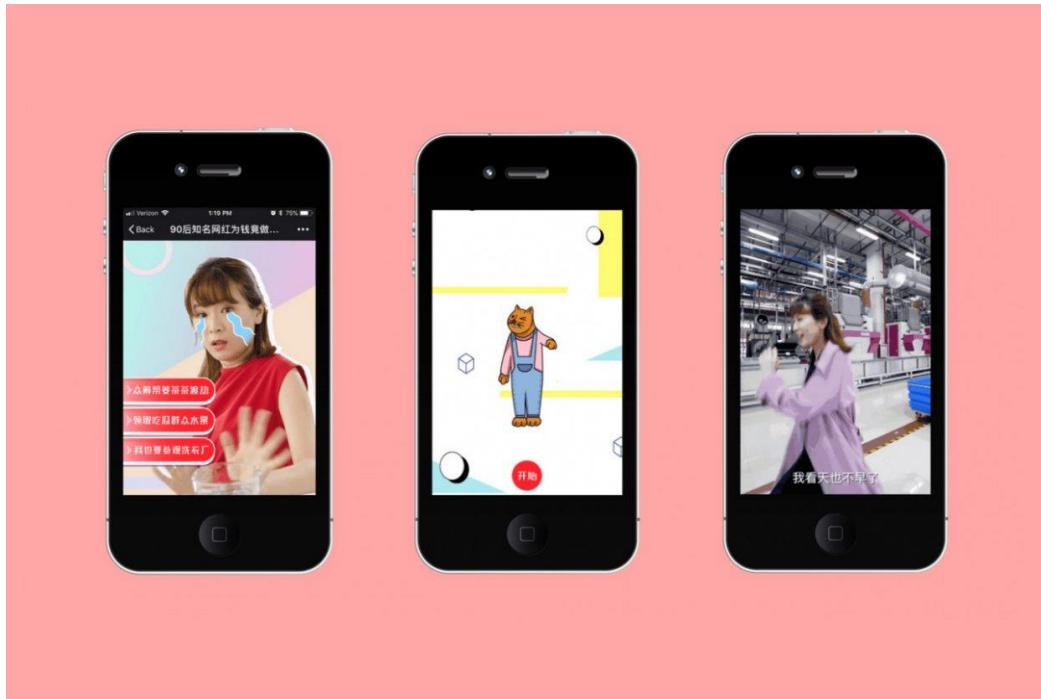
DAMAC's WeChat campaign focused around the presentation of the entire company through initiating the steps for building a brand image in China. DAMAC proposed a welcome page of its account on WeChat, complete with constant content with stylish HTML5 integration, keeping customers informed.



## ***Y Closet***

Y Closet is a Beijing-based fashion start-up that has managed to reach China's millennial consumers through seductive headlines and effective KOL choice.

With KOL Jiang Chacha, Y-Closet launched a WeChat video campaign aimed at educating consumer's about their cleaning process. This was in response to concerns about the sanitary risks involved with their second-hand clothing, which was one of the biggest barriers between them and acquiring consumers effectively.



The video campaign had their KOL Jiang Chacha take a drink from one of their washing machines, as to prove how clean and sanitary their facilities are. Furthermore, their choice in the KOL was unique in that Jiang Chacha is not a fashion influencer, but instead is revolved around advertising and marketing. But by collaborating with a marketing influencer, Y Closet is able to reach their target demographic of young, working women in high tier cities as most employees at Chinese marketing agencies tend to have more young females.

# Weibo

## 1. Overview

Sina Weibo was launched in 2009, 3 years after Twitter, and has since then become one of the most prominent sources of news for netizens in China. Initially seen as just a Chinese copycat of Twitter, it has gone on to make great strides in becoming its own individual platform -- and now surpassing Twitter in both daily and monthly active users.



Weibo is an open social media platform that focuses on providing media updates and information. It is very popular as Chinese users can simply open it up every morning, and within seconds will have all the latest news at their fingertips. Furthermore, while Weibo does act as a large source of news for Chinese users, it is just as commonly used to follow their favorite celebrities or influencers. This bears similarities to Instagram, where users watch videos, scroll through photos, and discover the latest trends through celebrities; making it ideal for brands that have relations with well-known KOLs.



With 91% of Chinese respondents (in a McKinsey survey) reporting the use of social media for information (versus just 67% in the US), Weibo has become a necessary part of the every day Chinese lifestyle.

## 2. Statistics

Like WeChat, Weibo is flourishing in it's position as the second pillar of Chinese social media. As of Q1 2018, Weibo has reached 411 million MAU, an increase of 20.7% year-over-year. Most impressively though is that their Western competitor Twitter in the same quarter only reported 336 million MAU, and only a 3% YoY increase at that.

- Weibo recorded 411 million monthly active users for Q1 2017.
- Avg. daily active users reaches 184 million, a net addition of 30 million.
- Among the active users, 93% were accessing Weibo through mobile devices.
- Gender usage is almost identical, with 50.10% of Weibo users being male and 49.90% female
- There are over 100 million messages posted by users each day
- 70% of Weibo's active users are at university level

## 3. Analysis

### *Account Authenticity*

With such a heavy reliance on social media for news, Chinese netizens are only too aware of how not all sources are equal. Thus authenticity can be a defining factor for a strong Weibo presence. Users need to feel confident the brand they are talking to is authentic.

This is where verified accounts comes in. Users are given an option to go through a verification process depending on the type of account they are, and the conditions that they have met:

Summary table

		Individuals				Organizations
Type	ORANGE 身份认证	PURPLE 关系认证 (达人)	RED		GOLD 金V认证	BLUE 官方认证
	自媒体认证	蓝V自媒体				
Suitable for	Personal users	KOLs	Grass root media	Grass root media partners	Superstar KOLs	Companies, non-profits & government institutes
Example						
Icon						
Requirements	Profile photo & verified phone number					
	Follow >50 users Have >50 Followers Support of 2 verified followers	In the past 30 days post >30 times and earn >10k reads	Post consistently in a specialized field (see Weibo's categories)	Post >20 toutiao articles or have uploaded >20 videos to weibo or miaopal	>1,000,000 reads per month and >10k followers	Pay a fee: Basic 500元 Medium 5,000元 Advanced 9,800元
VIP Phone Customer Service (Chinese Only)					✓ (medium and advanced)	
Annual Membership					✓ (advanced)	

Once complete, the verified account will receive it's respective V-for-Verified logo, proving their legitimacy. Though tedious, this verification process will enhance credibility, and provide companies with the best opportunity for success on Weibo.

## Micro Topics

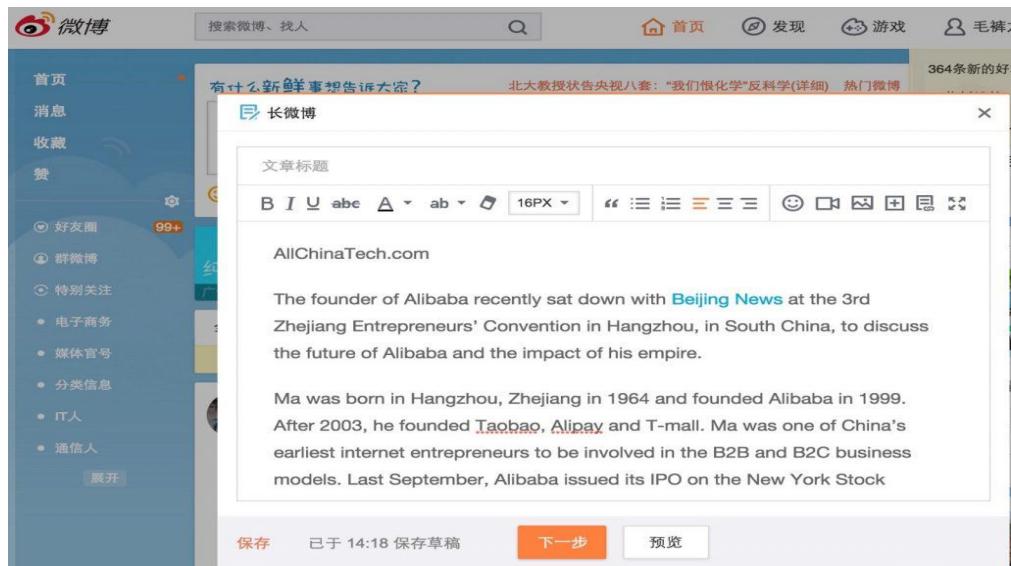
Micro Topics are a relatively new concept to micro-blogs and have been implemented by Sina Weibo to allow information to be more rapidly and effectively distributed. The feature gathers tweets about a certain topic, and then creates a unique page that lets all Weibo users to view and discuss that particular topic.

This makes it very easy for brands to spread news or knowledge about topics relevant to their company, and when done right, can be one of the best strategies to build brand awareness and to get known on Weibo for millions of Chinese consumers.

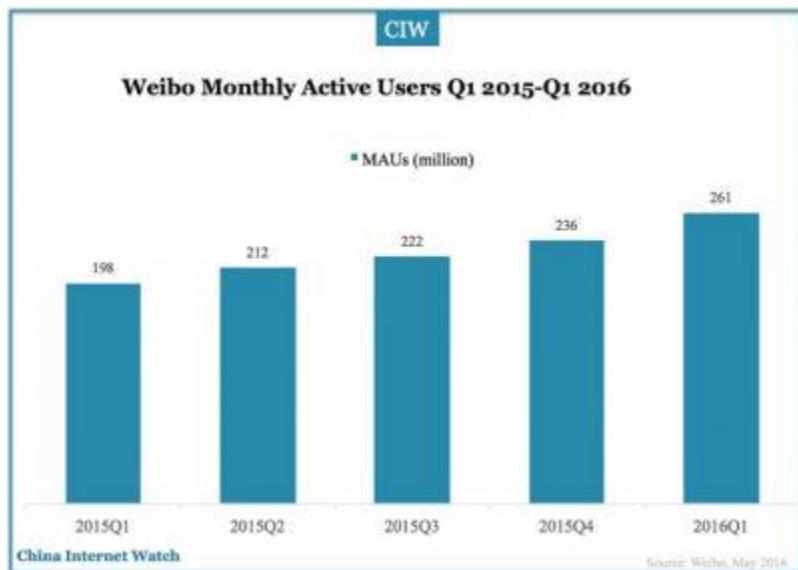


## Character Count

The most important aspect of micro-blogs like Weibo and Twitter is the brevity of the posts, allowing any brand to get across important messages while leaving a lasting impression on consumers. In January 2016, Sina Corp chose to be the first micro-blog to lift the 140-character count, expanding it to 2000.



This change was one that not even Western competitor Twitter was willing to make, and yet had immensely positive reception, securing Weibo the largest monthly active user increase since inception, and a significant boost in daily users.



Furthermore, the increase in character count also increases user engagement without taking away from the core image of what a micro-blog is. This is demonstrated when Twitter followed suit, lifting their 140-character limit to 280. Twitter CEO Jack Dorsey expected tweets to be longer after the change. On the contrary, the average length of the tweets did not change at all, while surprisingly the percentage of users who abandoned tweets had declined. The icing on the cake was overall user engagement significantly increasing. “We’re seeing a lot more retweets and we’re seeing a lot more mentions and we’re also seeing people get more followers and return more often,” said Dorsey.

Given Weibo's massive surge in user activity after their change, it is likely that the Chinese micro-blog saw similar results. The less restricted character count will allow brands to craft more detailed and informative posts than before. The character limit increase will play a key factor in motivating more users to leave feedback or opinions on topics, which will help bolster engagement between followers and a company.

### ***Coach's Raffle for Engagement***

Coach is a multinational luxury fashion company based in New York City. Founded in 1941 by Lillian and Miles Cahn, Coach has seen a steady growth, with a solid revenue of \$4.24 billion as of 2016 and is leading as one of the most prominent brands on Sina Weibo.

Coach released a Weibo campaign in China called Coach Footprints back in 2013. The campaign encourages any of Coach's Weibo page followers to provide their contact information for an opportunity to win a luggage tag, valued at RMB 500 (\$82).



Coach randomly selected one lucky fan every day and posted the winners on the brand's Weibo page. Since the launch of the campaign in September to mid September, reposts increased by over 13 percent and user comments by 50 percent. Their followers increased by 157% (7,358 followers) over the campaign. The campaign was not only a great way for the brand to connect with their fans and followers, but also provided the brand with a way to create their own customer relationship management (CRM) system in China.

### ***IWC (International Watch Company)***

There's a huge seasonal event coming up, which your target demographic will no doubt be heavily invested in. So what is the best way for a brand to get themselves at the forefront? Swiss luxury watchmaker IWC answers this question with their timeless Most Stunning Moon campaign, created as a way to position their relatively new brand at the centre of China's 2013 Mid-Autumn Festival.

The campaign encourages China's luxury consumers to follow IWC's new Weibo page. The main part of the campaign would lie in participants sharing a photo of the moon, along with a caption. The Swiss watchmaker would then select three winners with the most beautiful photo and caption to win a Mid-Autumn Festival surprise gift.



This campaign was a particularly clever way to generate interactions with Chinese customers, and introduce IWC to the Chinese audience as a brand that is aware of the festivals and events that take place in China.

There is no secret or recipe to success in Chinese social media, but it starts with a creative campaign that prompts users to engage with brands. Give Chinese consumers a reason to start engaging with your brand, even if you don't have a presence in China, and chances are they will start to pay attention to your products.

### *Tiffany & Co*

Tiffany & Co compares the accounts and lifestyles of high level KOLs and celebrities with their brand's product and culture. An example of this is with @wangxiaohei, where the artist's photography is compared to Tiffany's jewelry. Tiffany's focuses on Wang's ability to express the beauty of normal objects relating her use of visual words to express truth, to how Tiffany & Co's jewelry pieces are created. This tagging strategy allows the jewelry brand to target specific groups.

within the Chinese market, while simultaneously positioning their brand alongside these Weibo celebrities.

Tiffany & Co also posts customer service options on Weibo. This saves time for users as they do not have to actively search for help on Tiffany's website. This tactic also bolsters engagement with user and brand, and the immediacy promotes fast and easy connections. Once the connection is established, Tiffany's immediately follows through by providing a clear course of action to take with the necessary resources.

### ***Nestlé Ice Cream***

In 2012, Nestlé Ice Cream launched a Weibo campaign to promote their newest ice cream product at the time, the BenNaNa Ice Cream. The new item was unique in that it is eaten just like a real banana; an ice cream base, with a peel-able jelly shell.

Nestlé Ice Cream created a micro-site that would consistently publish funny videos and photos of users eating BenNaNa. With almost three million users sharing posts or uploading, it was safe to say that it was a success.



The success of this campaign was helped by the use of Sina Weibo hashtags, such as #LegendaryNestléBenNaNa and #EatingABananaWithoutSpittingOutTheSkin, which encouraged users to share their own jokes and experiences

Two weeks later, Nestlé Ice Cream's was behind the number one trending topic on Sina Weibo -- "BenNaNa", and has since been ranked among the top 10 Weibo searches seven times. While this campaign occurred in 2012, it may have had even more success in 2018 given the functionality of micro-topics, which would have further spread the influence of this craze through micro-topics like "dessert", "trend", "ice-cream" and so on.

## ***OPPO***

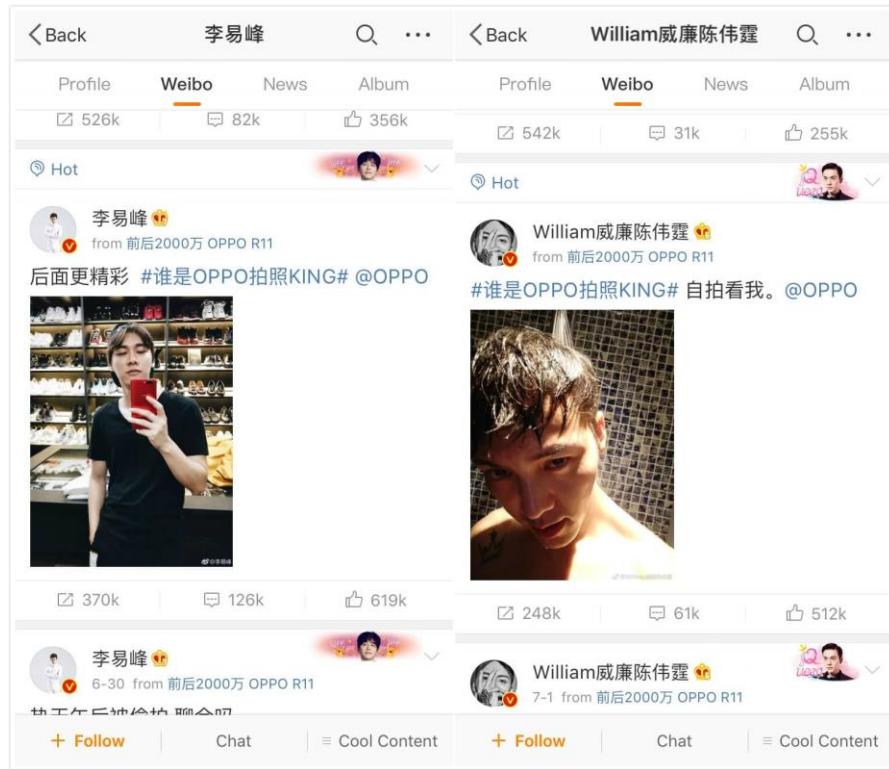
OPPO is a Chinese electronics company known for their camera phones for millennials. They released a Sina Weibo campaign in celebration of their new camera phone, the OPPO R11. Their Weibo campaign, called #Who is OPPO's Photo King, featured celebrity competition, KOL participation and User Generated Content.

The campaign began with KOLs William Chan and Li Yifeng uploading selfies with the front and back camera respectively, with the hashtag #Who is OPPO's

Photo King. The posts garnered a total of 187,000 comments, and 1,000,000 likes. This was then coupled with a promo video of each, which would then spark an online voting competition between the two influencers, where Weibo users could vote for whether they liked the front camera shots, or back camera shots more



At the beginning of the campaign, William Chan posted a selfie taken with an OPPO R11's front camera with the hashtag #Who is OPPO's Photo King#. The next day, Li Yifeng took a selfie with the back camera and also posted it on Weibo. Their posts caught people's attention, together receiving over 187,000 comments and more than 1,000,000 likes.



Other Weibo KOLs with millions of followers were also paid to promote the promo videos with the campaign hashtag, in total adding an additional 50,000,000 views overall. By the end of the 2 week long campaign, the hashtag #Who is OPPO's Photo King was viewed over 460,000,000 times and discussed more than 22,200,000 times

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# Section One Wrap-Up

## WeChat

- Most popular app in China with every 7 out of 10 people in China using it every day. Useful for almost every aspect in Chinese daily life.
- WeChat sits at 1.08 billion MAU and 902 daily users. 90% of the userbase is in China. Optimal for strategies targeting Chinese consumers.
- Males to females are fairly equal, and 90% of WeChat users are 18-36, making it an ideal demographic for luxury and fashion brands among others.
- WeChat has WeChat Pay, allowing brands to integrate WeChat with e-commerce strategies i.e. QR codes.
- WeChat Official Accounts (OA) are essential for any brand targeting Chinese consumers, providing a central hub of information in Chinese social media.
- Mini Programs are gaining popularity incredibly quickly and are not showing signs of slowing, can be used for campaigns, promotions and quality of life for consumers.
- Mini Games are effective especially among younger users, with the more popular games having more active users than ‘Pokemon GO’ had at its peak in 2016.

## Sina Weibo

- Sina Weibo was originally seen as a copycat of Twitter, but has since then moulded into its own platform.
- Surpasses Twitter in monthly and daily active users (411 million monthly and 184 million daily)
- Weibo is used for news, but is also just as often used to allow people see updates from their favourite celebrities and KOLs, kind of like Instagram.
- 91% of Chinese report the use of social media for information, which is a contributor to Weibo’s overwhelming success

- Gender usage is identical, and 70% of Weibo's active users are at university age. 93% of Weibo users access it through mobile, so focusing on improving the mobile QOL is necessary.
- Weibo's strongest benefit is micro topics, which collect information about topics into unique pages. Brands can spread news or knowledge about a topic relevant to them, to build awareness across millions of Chinese users faster than any other platform.
- WeChat unlike most micro-blogs (like Twitter until very recently) has broadened their character count to 2000 words versus the standard 140.

# Section Two | Live Streaming and Short Videos



China has completely stepped ahead of the curve on live streaming and short videos. China is more invested in video media on social platforms than any other nation, with viewership hovering around 456 million from live streams alone.

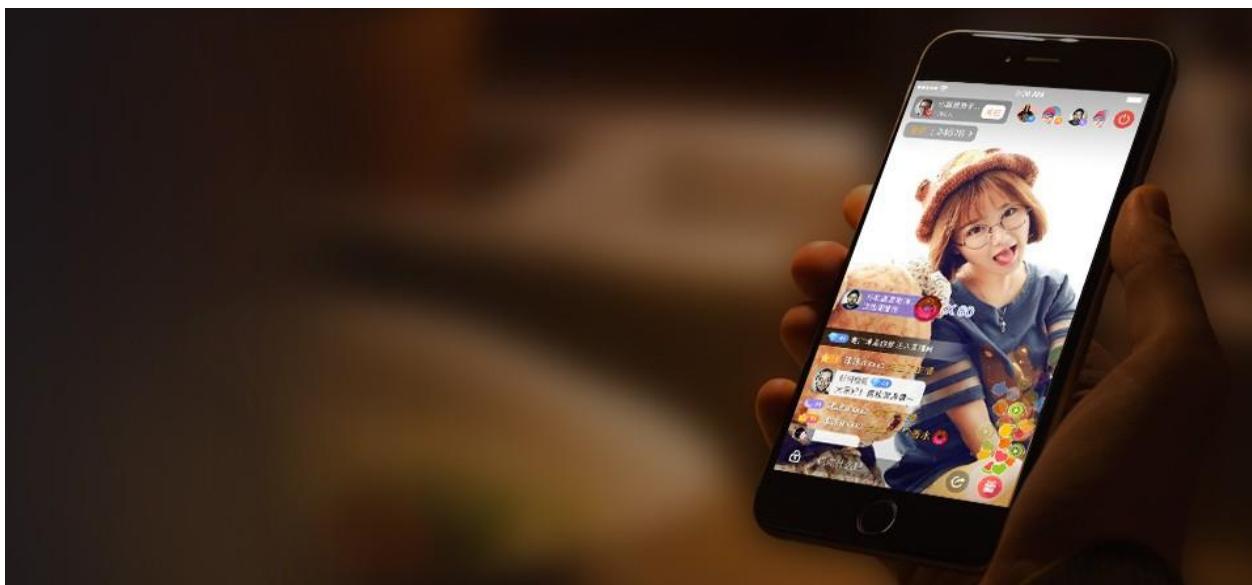
Deloitte, a consultance, estimates that China's live streaming revenue will hit \$4.4 U.S billion by the end of this year, up 32% from 2017 and 86% from 2016. Short videos are not getting the short straw either, with a report by iResearch showing China's short video market being valued at \$900 U.S million in 2017, a YoY increase of 184%. Young people are constantly immersed in live streaming and short videos every day in China, similar to the role YouTube might play in the U.S.



# Yizhibo

## 1. Overview

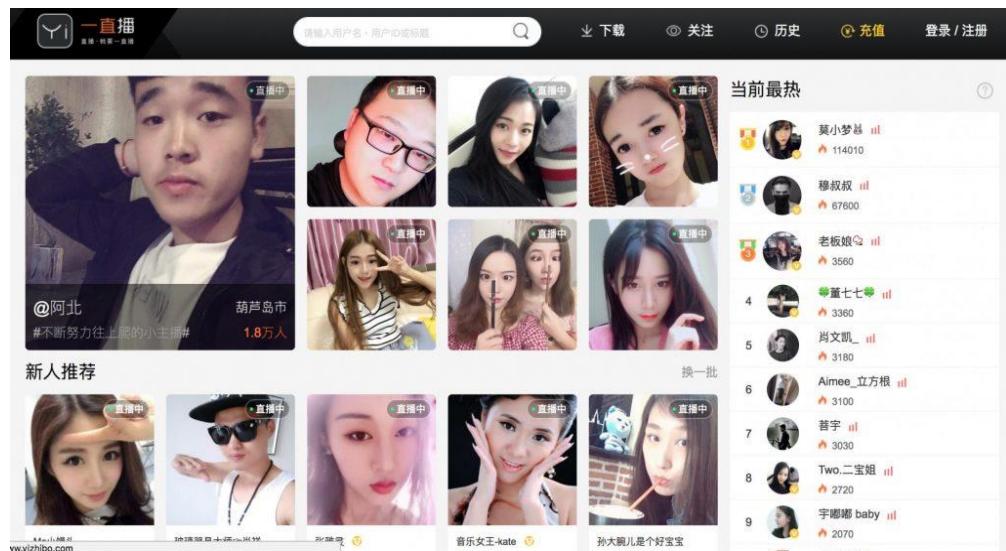
Yizhibo is the live streaming platform of choice for Chinese millennials. Yizhibo was founded in May 2016, and has quickly achieved massive performance and popularity, in part thanks to its partnership with Sina Weibo. The partnership allows users to view Yizhibo live streams and videos and interact with broadcasters (i.e. send virtual gifts) directly through Weibo without installing any other application.



Users can live stream almost anything, such as singing, dancing, tutorials, discussions, Q & A sessions. As a go-to channel for live-streaming events on Weibo, Yizhibo has attracted many Chinese celebrities and brands to debut collections and products on its platform. Yizhibo offers filters, which can be utilised by e-commerce for branding and interactivity. Along with this, broadcasts can be categorised according to location, popularity, topic etc. which allows live streams to be tailored towards certain demographics. Categories include:

- Overseas
- Fashion
- Gaming
- Teaching Skills
- Music/Singing
- Government

In terms of the interface and functionality, it is not unlike Instagram Live, or Periscope. Yizhibo has increased the efficiency of information exchange, due to its speed and immediacy, where users can simply move on to the next live stream with a tap of a button until they find something they are interested in learning about.



## 2. Statistics

A month after its launch, Yizhibo was able to boast an impressive 7 million daily active users, with more than 300 Chinese celebrities joining in. This has increased Yizhibo's exposure and trustworthiness in China, further pushing their already prominent user-count upwards.

In an interview by Harbinger China, with Spencer King (Divisional Head of the company behind Yizhibo), we learn that Yizhibo is one of China's most popular live streaming apps with over 3,000 celebrities using it daily. While MAU figures are unclear (Yizhibo has never officially published these numbers), since it is so closely linked with Sina Weibo, we can assume it could have anywhere up to 200-400 million monthly active users.

The main users of Yizhibo are young, tech savvy, and affluent with 30% being located in first-tier cities, and most belong to the post 90s and post-2000 generations. The demographics are largely skewed towards female. Spending power is often mid-level or higher, therefore making Yizhibo an ideal environment for content and product marketing.

## 3. Analysis

### *WeChat partnership*

Because Yizhibo is integrated with Sina Weibo, it opens up a new array of unique advantages. As mentioned earlier, users can watch posted Yizhibo live streams from Weibo, and even send gifts. Furthermore, if users miss a Yizhibo live stream, this allows them to navigate to the live streamer's Weibo to share, comment and interact even after the event has finished.



Celebrities and KOLs have used Yizhibo and Weibo together to connect different followings together, an amazing opportunity to promote products, shows, and so on.

### ***Key Opinion Leaders***

Yizhibo is also a place where key opinion leaders (KOLs), and their clients' brands, thrive, as KOLs are able to endorse products or places through live-stream content. Chinese users often appreciate and deeply trust KOLs' opinions. If a KOL is live-streaming on Yizhibo about a given topic, viewers are able to listen, ask questions, and engage in real-time to learn more about the given topic.



## ***User Behavior***

Like any other social platforms with a Chinese millennial-centric audience, Yizhibo's users are very caught up with trending topics and themes. For example, during Woman's Day, all content about make-up, skin care and women's fashion saw immense peaks in popularity.

In relation to the ideal time for live streams, Yizhibo users are also more likely to be on during the evening. As user numbers increase, their activity level and viewing duration also becomes higher. This is no surprise, as live streaming is an easy way for people to relax, get caught up with recent happenings during the day after work.

## ***Marketing Strategies***

With Yizhibo's huge user base, marketing strategies on it can usually yield massive success and follow-back. Two examples of successful Yizhibo marketing lie with Nutrilite and Haier.

Nutrilite launched a live stream named 'Breakfast for Everybody' in December 2016. This was to promote their products, along with a healthy lifestyle. This was further helped with KOL Junifly working together with Nutrilite to do a sponsored

live stream. The stream brought in 150 million views in just 3 days, and over a million users participated to share their breakfast.



Haier also started their first live stream on Yizhibo to promote their new no-clean washing machines. Haier introduced the product and encouraged the audience to participate in a free trial. The live stream attracted 1.8 million views and helped its Yizhibo official account attract 0.12 million followers in 2 hours.

### ***Impact of a single KOL***

In 2016, popular Korean actor Song Joong-ki's Asian Tour was backed by Jia Nailiang, Yizhibo's Chief Creative Officer.



During the Asian Tour, Nailiang interviewed the Korean actor live on Yizhibo. The impact of this was far-reaching, with 2 million viewers online at one time (which itself became a record). Within half an hour of the show starting, it had over 7 million views.

A week later, Yizhibo also live streamed Song Joong-ki's fan meet and greet in Beijing, with the broadcast receiving a total of 11 million views and 30 million likes. These figures go to show the influence of just a single influencer, and how much potential power and outreach brands have at their disposal through influencers.



### ***Travel Brands***

Yizhibo proves to be an invaluable asset to destination marketing organisations and travel brands. Similar to KOLs, there is not a direct conversion, but instead it generates significant buzz and influence. It is also an ideal way for consumers to learn more, as they can ask questions and interact with the brand in real time. This is shown to be the case with the San Francisco Travel Association who held consistent live-streams promoting their destination to Chinese viewers.



Beginning in December 2016, SFTA started holding Yizhibo live-stream events at locations such as San Francisco International Airport (SFO), San Francisco Museum of Modern Art (SFMOMA), Napa Valley, and Yosemite, with the Yosemite livestream gaining a total of 148,000 total views.

### ***Summer Sweetie***

Girl group reality show contest “Summer Sweetie” added a twist to their auditioning process. Instead of only offering traditional auditions, they also gave wannabe contestants the opportunity to apply through various online platforms. The girls with the most social media upvotes would get the chance to participate in the contest.

Among the platforms offered was Yizhibo and Weibo. The concept of this campaign was unique, and worked well in getting users to engage with the platform. Furthermore, it was a great way to promote the reality show contest as it would give a way for online users to connect with the brand and the show's contestants; making it easier for them to want to watch it.

## *Aptamil*

Aptamil (a baby milk company) collaborated with e-commerce platform Kidswant to create a live streaming campaign on Yizhibo.

They invited three top-tier Mommy / Babby KOLs such as Long-lena to share their unique approaches to caring for their own children. The live stream on Yizhibo reached millions of moms across China, and in total generated 6.2 million viewers. A week after the video campaign, they recruited 15 influencers to spread awareness of them; simply mentioning Aptamil. This bolstered their already successful results of the video campaign, with an additional social media exposure of 1 million Chinese users.

They also had a Weibo hashtag, #爱他美 燃烧吧小宇宙 included with the campaign which tracked 12.62 million views and 36,000 discussions.

# Alibaba (Tmall and Taobao) Live Streaming

## 1. Overview

The key to understanding Alibaba Live Streaming is to understand the powerhouses behind it. Tmall and Taobao are both online marketplaces created by Jack Ma's Alibaba group specifically for Chinese consumers.



However, they are not the same. Whereas Taobao operates C2C (consumer to consumer), Tmall uses a B2C (business to consumer) model. Taobao is generally unrestricted in terms of user use and acts as an intermediary (a platform) in sales between private parties. Tmall is unique in that it is exclusively for brands, and requires all sellers to be trusted and verified (at minimum, needing a physical store in China). Most importantly, Taobao and Tmall are not competitors. They simply cater to different shopping needs.

In relation to the live stream platform, Alibaba has made it clear that the goal of the live streaming platforms will be to promote consumption. Enforcing this, is the fact

that Tmall Live Streaming has popularised the 'See now, Buy now' strategy for live streams, being used on Tmall by notable brands like Burberry, Ralph Lauren, Victoria's Secret just to name a few.



## 2. Statistics

Taobao Live Streaming is competitive: with over 10,000 hosts. Top Taobao influencer such as Zhang Dayi's annual income is reported as 300m yuan (£35m; \$46m) in 2016. This was higher than the top Chinese actresses reported income.

- While Taobao is not the only live streaming platform for commerce, it is one of the most relevant for shopping. According to Alibaba, the conversion rate of content on Taobao Live is 32%, which means for one million views, 320,000 items are added to cart.

Tmall Live Streaming is dominated by influencers and is used by 67% of brands in L2's Digital IQ Index: Beauty China. Furthermore, broadcasts on Tmall Live Streaming generated 23 times more engagement according to L2. Streams are also benefited from KOLs.

- Celebrity live streams garner an average of 3.8 million interactions.
- KOL live streams garner an average of 476,534 interactions.
- Live streams without famous figures garner an average of 141,121 interactions.

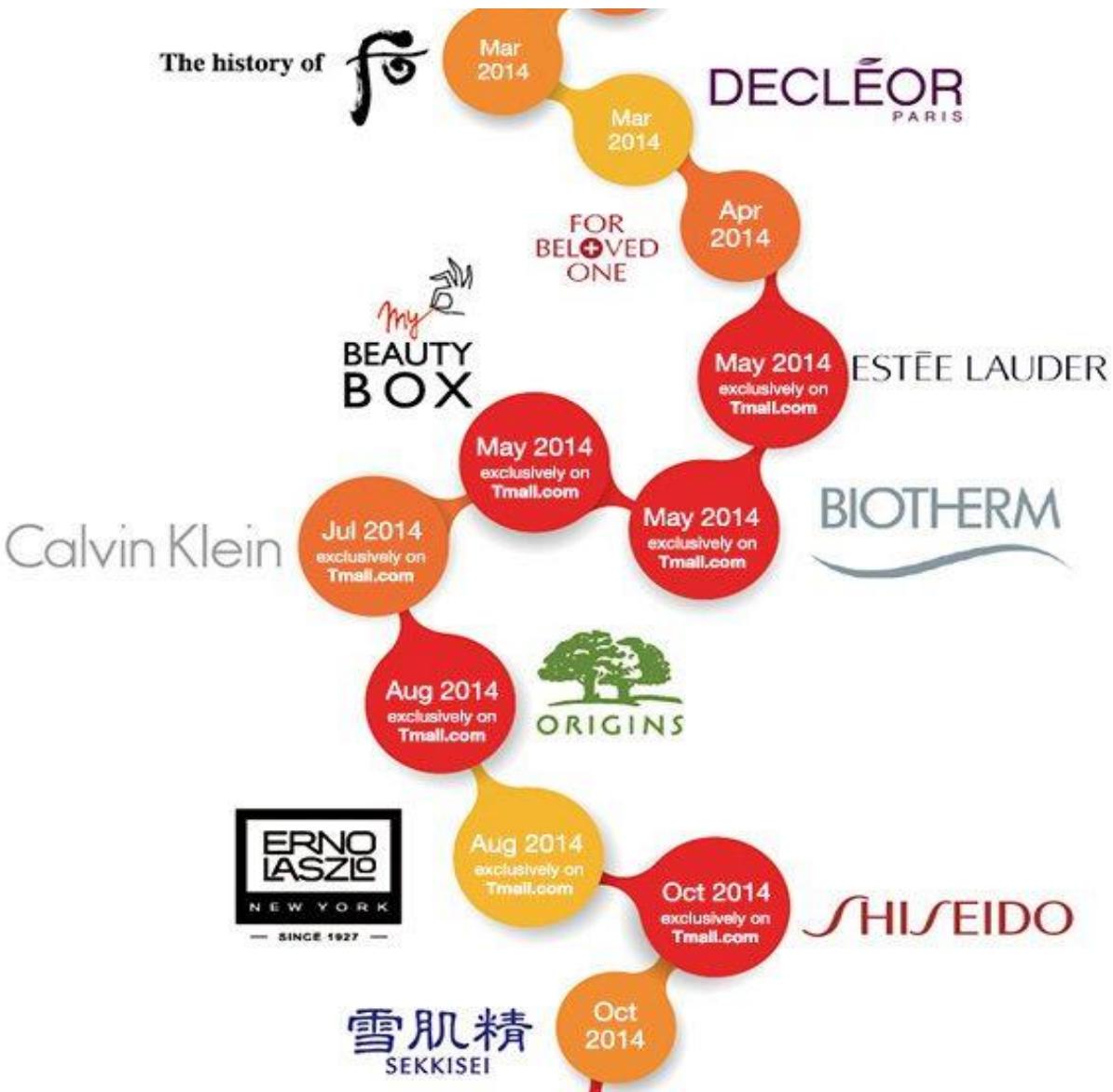
### 3. Analysis

#### *See Now, Buy Now*

Tmall kicked off 2017's Singles' Day Build-up with a star-studded 'See Now, Buy Now' live fashion show in Shanghai on October 20, with "retail as entertainment" as its main theme. This marked the official start of Alibaba's 3-week promotion campaign to build interest ahead of the 11.11 online frenzy.



This show would showcase more than 50 carefully-selected fashion brands (local and international). These selected fashion brands would later become available to preorder for Alibaba's November 11 Singles' Day. Top brands i.e. Estee Lauder, Victoria's Secret, Ralph Lauren, and Furla, were among this year's participants.



Meanwhile, as part of the deal for the recent partnership between Alibaba and New York Fashion Week, three prestigious American brands (Opening Ceremony, Robert Geller, and Jason Wu), were selected to bring the Fashion Week spirit to China in their debut show this year.

To further stoke the online frenzy and build consumer interest, seven major Chinese media platforms, including Youku, Weibo, and Taobao and Tmall's shopping apps, broadcast the live show on October 31 2017.



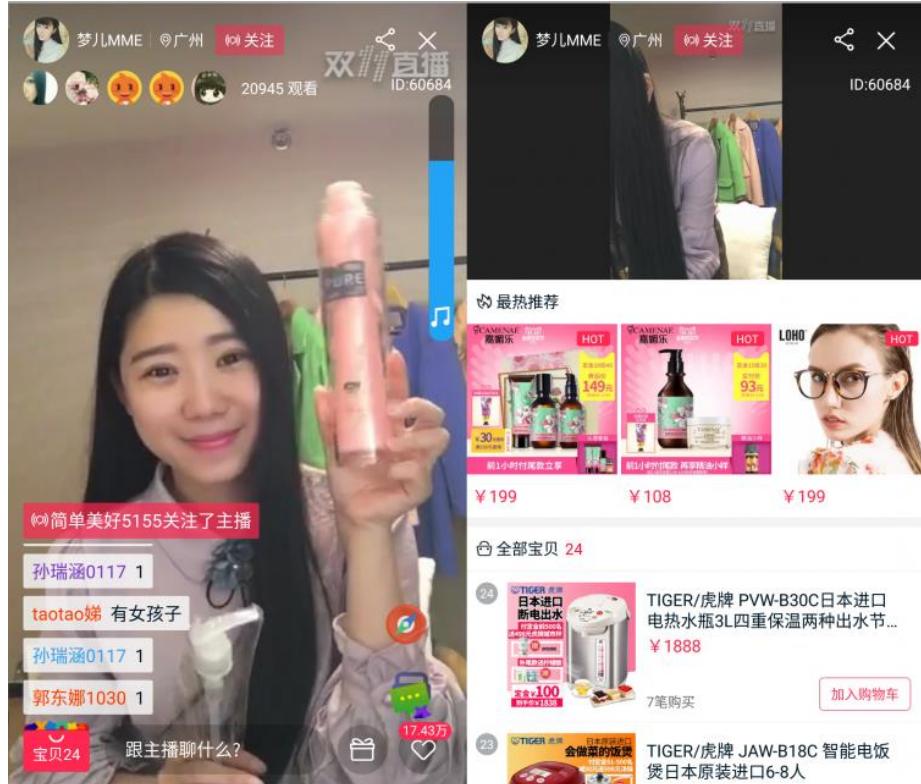
## Tips for success

Kuo Liao, a Taobao/Tmall live streamer with 105,600 followers gives these tips to brands for a successful live stream:

1. Start at a good time, preferably in the evening, and last at least 2 hours. The longer the better.
2. Use special offerings or discounts to push your audience to purchase.
3. Excellent presentation and useful information to introduce products, such as brand story, true personal experience, media recommendation, and analysis.
4. Always read the messages left by your audience and work towards building good communication.

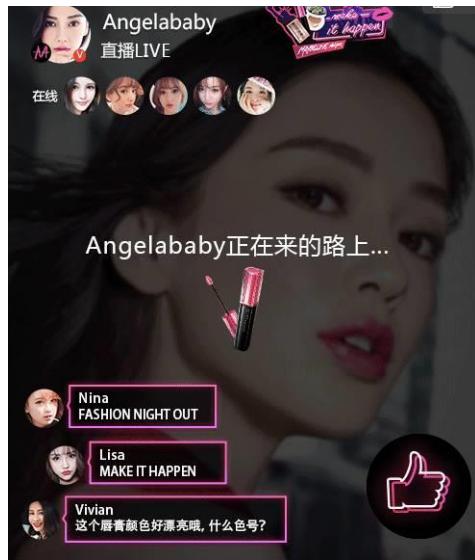
“Live-streaming in the e-commerce industry has become similar to home shopping channels in the US ... except you can engage with the merchants and they can answer any questions you have live. Right away, you hear positive comments about the item you’re interested in, and it’ll urge you to buy it immediately,” said

Tiffany Wan, general manager of VS Media, an agency that represents content creators and live-streaming stars in Hong Kong, Taiwan and the mainland.



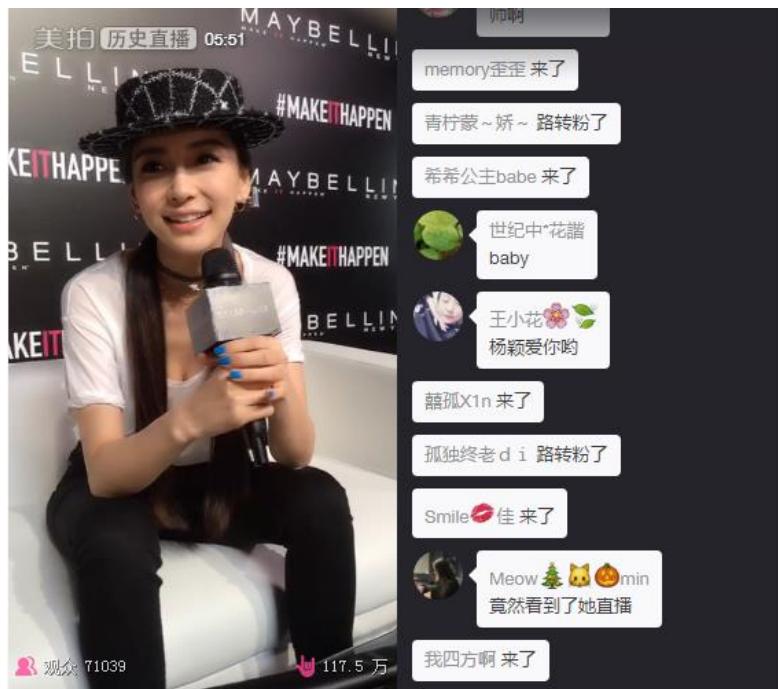
## Maybelline

Maybelline launched a live streaming campaign across Tmall and Taobao to promote their new lipstick products. They invited Angelababy, a very well known Chinese actress, in addition to several other cosmetic/beauty KOLs to participate.



The event was broadcasted via nine popular live streaming platforms, at the forefront of which were Tmall and Taobao's.

The live stream gathered over five million people on the two platforms, and sold over 10,000 lipstick within two hours, achieving 1.42 million RMB (over \$210,000 USD) in sales.



"Tmall brand positioning, and Taobao's 400 million active users can help us expand the scope of this brand activity in a short period of time." Maybelline e-commerce manager Teng Biao told "First Financial Weekly"

Illume

Another brand that utilised celebrity influence was Illume, a baby formula company who invited Wu Chan (a famous Chinese movie star) to host a one hour live stream on Taobao's live streaming platform.



Through the shopping-while-watching function, the sales conversion rate reached 36% – seven times more than Illume’s regular e-commerce conversion rate – and achieved over RMB1.2 million (US\$176,000) in sales during the broadcast.

### ***Planters Time Travel***

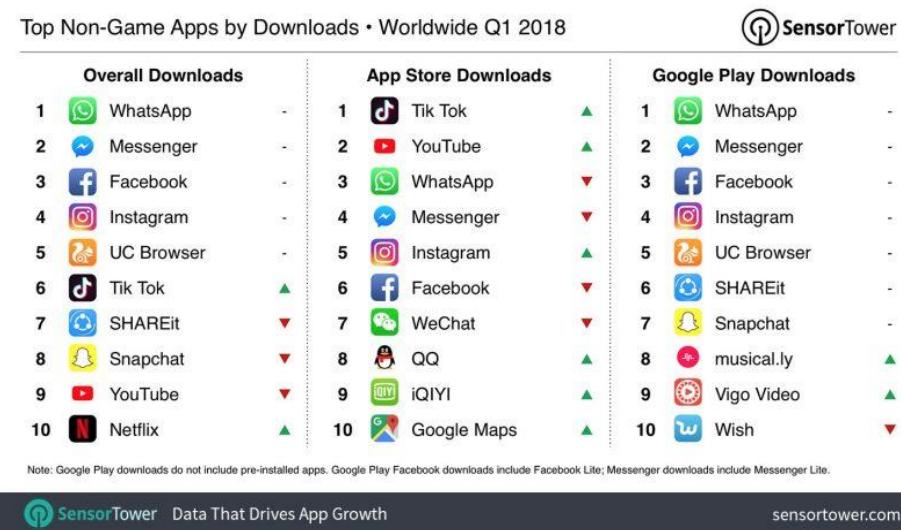
Planters launched a Tmall live streaming campaign using country history and KOL influence. Their campaign was built around a time travel theme, where they would set up 5 different variations of USA History.

It garnered a total of 28 million views (Tmall live streaming record at the time), along with their daily sales exceeding 1 million. Their Tmall following also increased by over tenfold, to 53,000.

# Douyin

## 1. Overview

Douyin is one of the most popular social media apps in China, and is built around short videos. Douyin allows users to post and send photos, livestream videos, and lip sync along to music. Douyin, is owned by ByteDance and was launched in September 2016. Despite having a relatively glacial growth until mid-2017, it has since then skyrocketed in popularity, both domestically and abroad. Tik Tok, the international version of Douyin, topped the Apple App Store's global non-game download chart for the entire first quarter of 2018, besting the likes of Facebook and YouTube.



Douyin's main use is to upload short videos (no longer than 15 seconds) for people to watch. Coupled with robust editing capabilities and quick consumption anywhere anytime, Douyin has become extremely addictive to the young Chinese crowd. Genres of clips can vary, and just about anything can become a viral sensation on the platform.

Some of the most popular genres of videos are entertainment focused, like pranks, stunts, comedy skits and of course dancing and lip-syncing to music, all of which can appeal to anybody.

## 2. Statistics

Douyin has had a meteoric rise of users due to the ease of content consumption on it. Furthermore, the variety and quality of videos being uploaded every day is staggering, getting users to come back day after day.

- A Jiguang Data report earlier this year showed that users are spending 20.5 minutes per day (avg.) on Douyin. Considering videos are 15 seconds each, that's 82 videos per day for EACH user.
- Douyin is getting 150 million users per day, and as of June, boasts a very impressive 300 million monthly active users (MAU).
- The click rates of videos on Douyin averaged 100 million times each day in May 2017. In August, the number jumped to 1 billion. This figure has likely increased tenfold since then.

The demographics of Douyin are ideal for brands:

- Over 60% of users have college degrees.
- 66.4% of Douyin's userbase is female.
- A whopping 80% of users on the platform are under the age of 30.
- Over 40% of Douyin's user base live in first and second tier cities.

## 3. Analysis

### ***Beauty Sells***

An overwhelming 80% of Douyin's userbase are under 30, and 66% of them are female, both are key demographics for fashion brands. Furthermore, Douyin, like

most social media apps, places more focus and promotion towards attractive content creators. With Douyin's core format of short 15 second videos, a pretty face can sometimes be the whole appeal of a video, leading to KOLs being immensely valued.



“The videos are funny, and some are just beyond my imagination, so I’ve often found myself still watching it more than an hour after I opened the app,” said Hao Jingyi, a 19-year-old college student in Shanghai. “And another important thing is that I can see many pretty boys and girls there,” she said.

### ***Wealth and Affluence***

Over 40% of Douyin's users live in first and second tier cities indicating wealth and affluence. Furthermore, a large portion of the users are between the ages of 20 and 25, meaning many are just beginning their careers and have potential to become luxury buyers in the future even if they aren't now. With 60% of these users having college degrees, the likelihood only increases.



## Hashtag Challenges

Michael Kors was one of the first luxury brands to partner with Douyin, and has had one of the most influential Douyin campaigns. Michael Kors made use of Douyin's hashtag challenge feature to get user engagement on a platform-wide scale. Michael Kors hired 3 fashion influencers to appear at a live streamed event with the brand's ambassadors including but not limited to Yang Mi and Mark Chao. Additionally, the Douyin KOLs present at the huge event (who have a collective follower base of 4 million) would promote a 'city catwalk' hashtag challenge by sharing videos of them doing a catwalk with Michael Kors products. Users would be invited to complete for the most popular video.



The three fashion influencers' clips garnered over 5 million views, along with over 30,000 other users posting their own 15-second catwalk videos using the hashtag.

### ***Douyin Stickers***

Another company that managed to use Douyin to success is Pizza Hutt. Their strategy was more simple, and utilised Douyin's own stickers. Pizza Hut launched a series of brand-sponsored animated stickers. These animated stickers are a fantastic opportunity for engaging millions of content-creating users every day, and would be used in short videos and even live streams.

### ***Mai Dong Ipad Air***

Mai Dong is a sports drink brand, targeting cityfolk around the ages of 18-35. Douyin presents an ideal opportunity for Mai Dong, with the right age along with plenty of penetration with China's more populated cities. Mai Dong's official

account on Douyin currently has 2.2k followers and just a mere 2 videos broadcasted.

The first video fell short, with just 200 likes and 7 comments. The reasoning behind this was that the video was neither engaging nor creative. A common trend among strategies in Chinese social media, is to place customer intractability near the front. The second Mai Dong video takes this philosophy, and succeeds with it.

Their second video presents a contest by the brand, where viewers would be asked to create a video while using the BGM provided by the brand, along with the hashtag #StartYourSpectacle during posting. At the end of the campaign, the challenger with the most popular video would receive an Ipad Air, and the top 30 challengers would be sent a box of Mai Dong's newest drink. Due to how easy it was to interact with this video, over 74,614 people joined, and the top video boasts an impressive 63.5 likes and 352 shares.

### ***Michael Kors Stickers***

Similar to Mai Dong, Michael Kors had also Douyin's platform in order to promote their hashtag (catwalk). However, the globally renowned fashion brand also accessed another aspect of Douyin, using short film effectively in a music video promotion along with Douyin's sticker functions as well.

Participants were asked to use Michael Kors virtual stickers that were specifically provided by Douyin for the campaign, as decorations on the video. More than 30,000 people uploaded their videos with total views reaching 200 million with 8.5 million likes. The campaign helped Michael Kors successfully refresh its brand image while collecting user-generated content and engaging a young target audience that may not have participated in their catwalk hashtag challenge (which was understandably less appropriate for users under 18).

## ***Douyin - Haidilao Hot Pot***

Haidilao Hot Pot introduced one of the most innovative Food & Beverage challenges on Douyin, featuring innovative call-to-actions. At the hot pot, restaurant-goers could request the ‘Douyin Dish’ (as mentioned earlier in this guide), and the staff would automatically know to let you ‘style’ your hot pot yourselves, and would provide you with raw eggs, tofu, shrimp paste and anything else you might need.



As of April 2018, an enormous 15,000 Douyin users had participated and about 2,000 short videos of the ‘Douyin Dish’ had been posted. The versions posted by certain food and lifestyle KOLs was able to receive over 50 million views. Most amazingly, this was all done without a single cent spent by Haidilao Hot Pot.

## ***Douyin - Chanel***

French luxury giant Chanel became the latest high-end brand to set up a presence on Douyin, the trendiest, millennial-focused short video social site in China.

From July 12 to 23, a total of 12 short videos about Chanel's J12 watch was released on Douyin's special channel, helping increase their product's presence on the short video platform.

# Section Two Wrap-Up

## **Yizhibo**

- Yizhibo has over 3,000 celebrities using it daily, and likely as much as 400 million monthly active users. 30% of users are located in first-tier cities, and most belong to post 90s and post 2000s generations.
- Yizhibo is large skewed towards female, and spending power is mostly mid-level and higher making the platform an ideal environment for content and product marketing.
- Yizhibo is partnered with Sina Weibo, allowing users to view live streams and interact with broadcasters through Weibo directly.
- The partnership with Sina Weibo allows for unique opportunities to use the two platforms together to increase engagement and influence. Brands can refer back to their Sina Weibo account, as to direct users to posts and brand updates.
- Users on Yizhibo are very influenced by KOLs, and Yizhibo encourages engagement between viewer and streamer. Using Yizhibo as a live streaming tool with any partnered KOLs to promote a campaign or product is likely to be a success.
- Yizhibo users are more likely to be on during the evening, so having strategies and streams beginning around then will reach more users.

## **Alibaba (Tmall and Taobao) Live Streaming**

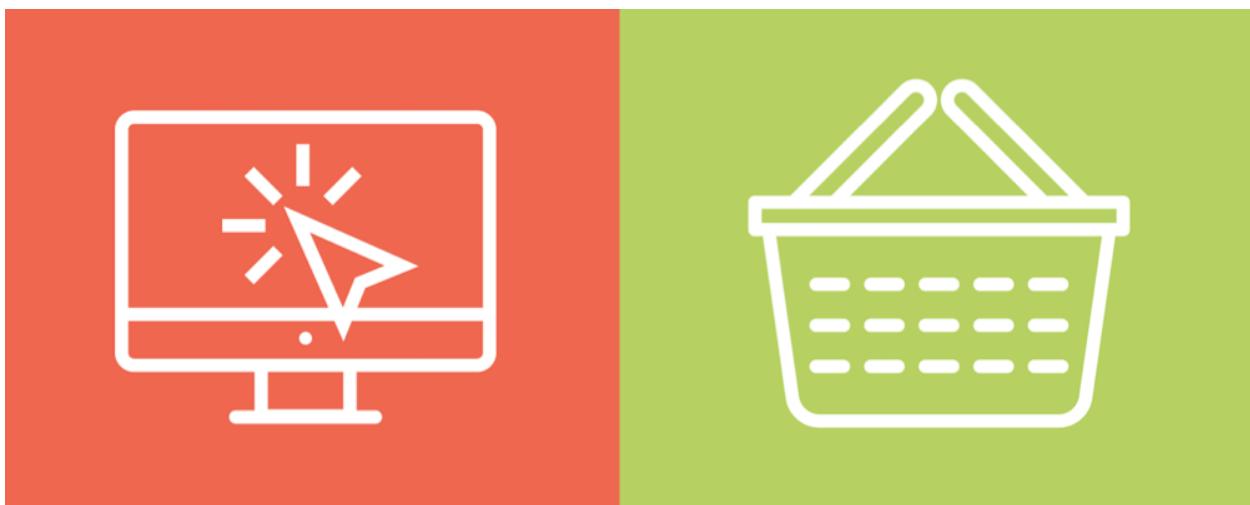
- Alibaba Live Streaming is essentially two different streaming services for two different e-commerce hubs.
- Taobao Live Streaming has over 10,000 hosts, with a 32% conversion rate on content. Taobao is more lax, for C2C.
- Tmall Live Streaming is used by 67% of Beauty brands in China. Using famous figures for Tmall live streams is highly beneficial, as live streams with celebrities can typically garner an average of 3.6 million more interactions. Tmall is more strict, for B2C.

- Every year, Tmall hosts its Singles' Day fashion show, with an enormous selection of carefully selected fashion brands like Estee Lauder, Victoria's Secret, Ralph Lauren and more. Even if your brand is unable to be on that list, Alibaba typically offers other opportunities for brands to benefit through promotions and sponsorships.
- As Alibaba Live Streaming connects to their e-commerce malls, it allows brands to more effectively increase conversions. This makes Alibaba Live Streaming ideal for e-commerce, and even better so provided you've spread brand awareness well (e.g. Weibo's micro-topics).

## Douyin

- Douyin has seen massive success in growth, with 300 million monthly active users and 150 million daily users, and consistently tops international charts with its global app Tik Tok.
- 40% of Douyin's users live in first and second tier cities. 60% of Douyin users have college degrees, and almost 7 out of every 10 users are female.
- Douyin's entertainment is very tailored towards beauty, with many of the popular users being attractive young adults. With over 80% of the userbase being under 30, this makes Douyin perfect for brands, especially beauty or fashion.
- Most of Douyin's userbase are still young, but since most have degrees and are beginning their careers, they are very likely to become luxury buyers in the future. Douyin users will typically have a WeChat and Weibo, and paying attention to users' other social media can be key in locating up and coming KOLs.
- Douyin has a very useful Hashtag Challenge feature that can easily propel any brand campaign to viral status. Users would be invited to compete by uploading videos following the theme of a Hashtag. Brands can use this to increase engagement and grow their following.

# Section Three | Social E-Commerce



8 out of every 10 people in China are browsing the internet daily, and with luxury consumption being so prominent, many of these users are undoubtedly looking at reviews and discussions of the latest trendy products and brands.

However that only accounts for browsing and searching for product information. When it comes to actual purchases, 581.5 million Chinese people are purchasing consumer goods via e-commerce every month, with the figure having increased 12.5% since 2017. In 2018, simply putting up a store online and hoping users happen to purchase something is not enough. Brand awareness, social standing and a reputation of high quality is a necessity, hence the need for social e-commerce in any Chinese strategy.

## Little Red Book

### 1. Overview

Little Red Book fits the criteria for social e-commerce perfectly, and is one of, if not the only platform that provides everything that brands need on the social e-commerce front. It provides a brilliant social networking interface, allowing brands to build trust and reputation amongst potential buyers through user-generated reviews and tips, while also having a very functional e-commerce system implemented which allows users to purchase straight away. Thus, making Little Red Book the one and only social e-commerce platform your brand will need to focus on



Xiao Hong Shu, or Little Red Book (also shortened to Red) is the top social e-commerce shopping app in China. It was launched in 2014 and became a hit among Chinese women. The concept of the app is uniquely Chinese, tailoring to

the three highly prominent needs of the affluent Chinese consumer; trust, community and convenience.



How Little Red Book works is it is a social platform for travelers to share and recommend products they brought while they were abroad. Users post product photos with reviews and tips, and others can read, comment or save these posts to boards. (Think of Pinterest) Red has created partnerships with multiple foreign brands, and also has an e-commerce component; allowing users to purchase directly through the app. In the past women that wanted to purchase these products would have to travel. Red Book now provides a better and more reliable alternative, especially as warehouses in free-trade zones can significantly cut shipping costs.

There are no paid ads on Little Red Book, as it focuses on authenticity by encouraging user generated content. As such, working with KOLs on Little Red Book is not just cost-effective, but one of the main strategies for brands on the app.

## 2. Statistics:

Little Red Book currently has amassed 100 million monthly users, with over 100,000 new users joining every day. The target demographic is 18-35 year old Chinese women, with 90% being female and 80% being under 30 years old.

Little Red Book has a blog site with over 200,000 bloggers who post their findings.

17% of the total daily visitors on Little Red Book were opening it six or seven times a day. According to market reports, the app delivers conversion rates between 8%-20% — which is considered the highest rate attainable within the industry.

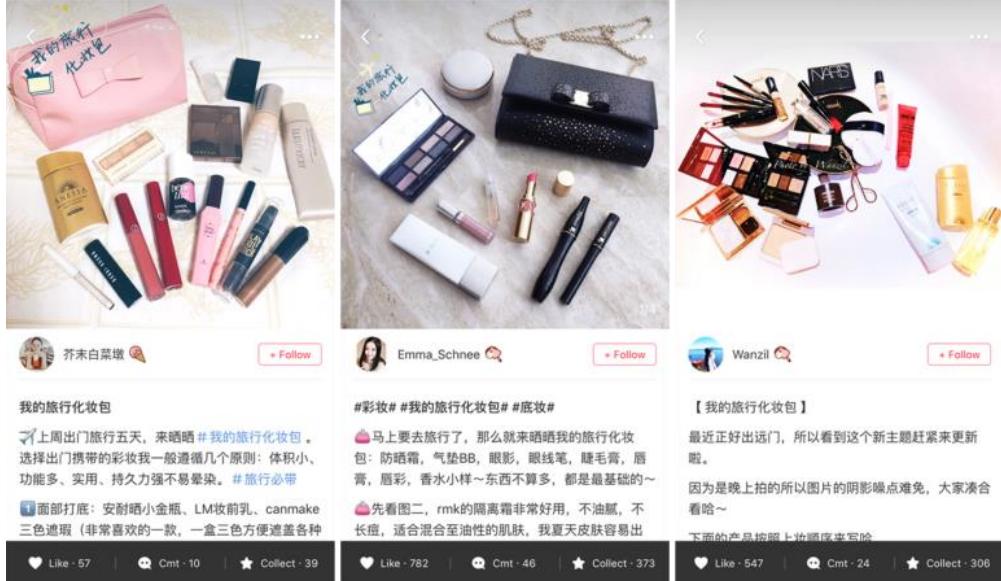
## 3. Analysis

### ***Red Book Hosted Events***

Little Red Book occasionally hosts Events that encourage users to post based on these events. This is in some ways similar to Douyin's Hashtag Challenges. Event-specific filters and stickers are created for the users to use, and posts that have used these seasonal filters and stickers will stand out.

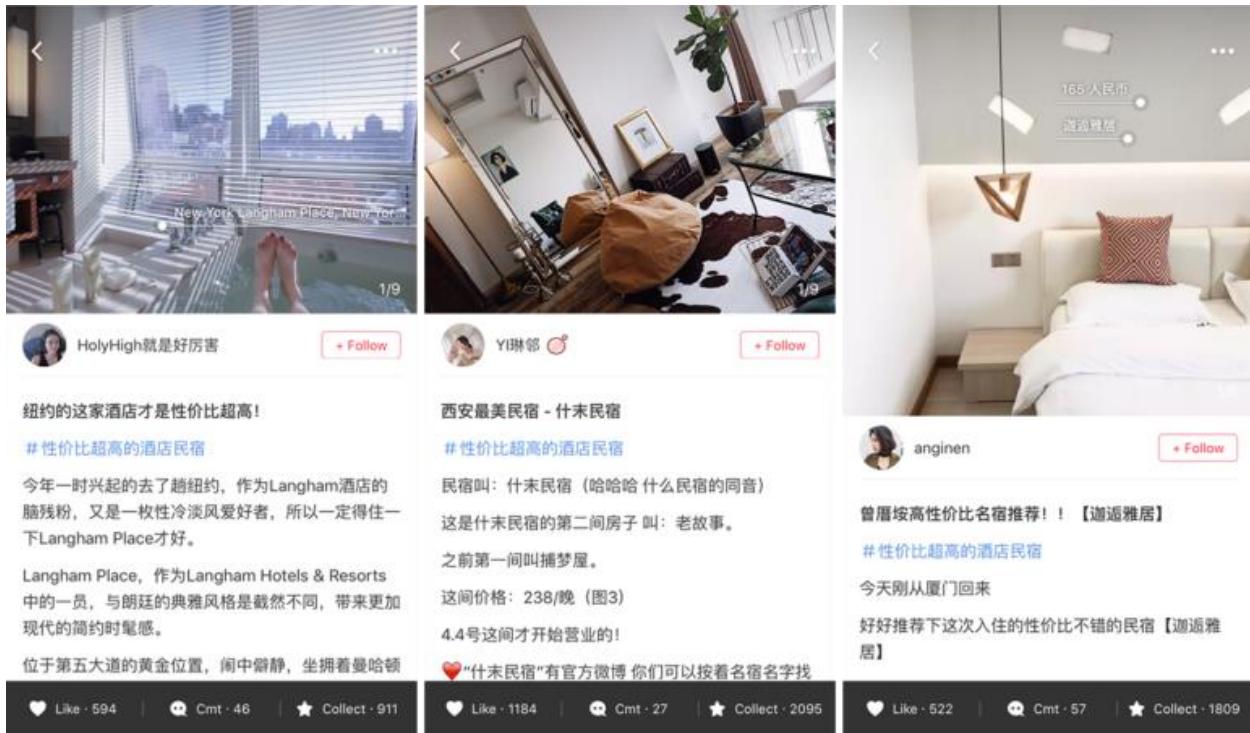
Brands can utilise these events to get more exposure and position themselves as the industry leader for certain occasions. An example of this is the '5-minute makeup challenge' that launched in mid 2017. Users would be encouraged to share tips for completing their makeup in 5 minutes, and the products they'd use.

If Chanel, as a brand, wanted to position their foundation as a product necessary for any quick & easy makeup routines, then it would make for a great opportunity to partner with Little Red Book KOLs to accomplish this.



## Topics

Similarly, Little Red Book will host **Topics** such as #My fall/winter outfits#. If brands are interested in featuring any seasonal products, it is a great opportunity to partner up with KOLs to do so.



## Top KOLs

With KOLs being such an essential part of Little Red Book marketing, it is important to know the who some of the most popular figures are, the type of content they deal in, and whether or not they can work with your brand. Below is a list of the top 20 Red Book fashion and beauty KOLs based on the ranking by Robin8, an Influencer search engine. This ranking is based on a number of factors including follower accounts, content relevancy, and engagement (comments, likes, reposts and shares).

Rank	Name	Follower	Aggregate Avg. Collections	Aggregate Avg. Comments	Aggregate Avg. Likes	TAG Probability	Industry Avg. Comments	Industry Avg. Likes	
1	美妆薯	372852	89	89%	214	50.00%	746	350	
2	穿搭薯	362540	40	87%	138	62.00%	428	372	
3	Swiss	184824	16	87%	90	62.50%	22	303	
4	吱吱cm	183340	62	83%	299	75.00%	92	375	
5	米儿姐姐	185942	27	94%	129	63.44%	53	329	
6	依格瓦	146197	9	89%	84	58.46%	63	325	
7	Irene林恩如	183714	478	86%	728	50.00%	281	264	
8	黄美丽	130061	41	100%	201	87.14%	72	239	
9	孙闪闪⚡	130909	73	89%	302	Fashion & Beauty	68.57%	105	448
10	MAXINE 时尚日记	129596	179	84%	324		82.50%	208	362
11	肖苗苗_p	107827	23	81%	161		70.00%	192	694
12	胡艾夫	101903	81	89%	167		75.00%	203	45
13	玛小粒Marley	104615	31	90%	194		90.00%	120	189
14	peki beauty	98166	66	81%	158		80.00%	195	293
15	夏鱼落Sarah	91487	30	82%	139		72.00%	28	211
16	蘑菇Maki	75353	47	86%	398		54.17%	79	477
17	薯宝宝	100848	20	94%	85		2.50%	366	185
18	臣妾萌萌哒	72499	25	86%	118		25.93%	12	289
19	画眼线的双眼皮兔子	70814	30	91%	221		60.00%	77	85
20	花生米儿	70836	23	97%	110		70.00%	209	205

- Sun Shanshan, who ranked at ninth on the list, reviews mainly health and beauty products. She includes a variety of image styles and writes very detailed product descriptions. Her photos often feature her demonstrating or testing out the product.



- You can see here how Redbook profile pages look somewhat similar to Pinterest and, in fact, users are able to create themed boards (which can be seen in a photo further down in the article). Users also have the ability to tag photos, allowing other users to click those tags to see the featured products.



- Maxine's content focuses on fashion. In her posts, she mixes in fashion product reviews with stories about her life, travels, and more recently, her experience with pregnancy and being a new mom. She writes in a very personal tone and makes people feel like she's chatting with her friends.



- Zhizhi cm's account is also beauty and skincare focused, but unlike Sun Shanshan's account, this account mostly includes product photos and seldom features photos of the influencer. Her writing style is also more polished and professional.

### ***Success Tips for Little Red Book***

As mentioned numerous times, KOLs on Little Red Book are one of the best ways to get the attention of users. By using KOLs to spread a positive image of your products, users will feel more confident to invest in your brand. The goal is to establish a positive reputation as well as increasing the visibility of your brand, business or product/service.



Another important tip is make sure you are paying attention to the Chinese consumers. Almost all people that are using Little Red Envelope, will have some idea on the standards they should be spending, from having experience in other social platforms. Consumers will catch on to even slight things, whether that be good or bad. And so, make sure you are managing your e-reputation well, as it is essential, from the very moment users begin commenting on your products. Support and boost positive comments, and react immediately to complaints to prevent tarnishing the image of your products. One single bad comment can have tenfold the impact of a dozen good ones.

Finally, conducting a market survey is a great way to understand your marketplace within Little Red Book, and allows you to see how you can more effectively advertise your proposition. Research your competitor's actions, what are they doing effectively, and in what area's do they lack.

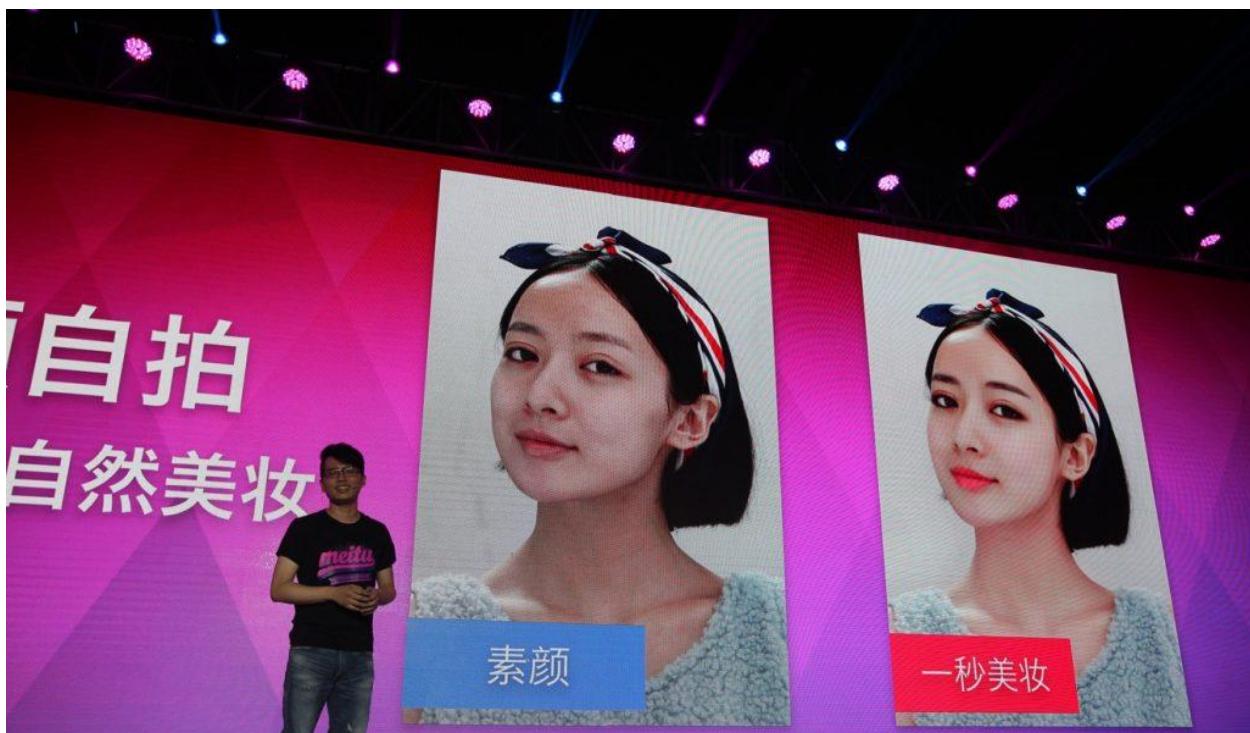


# Section Three Wrap-Up

## Little Red Book

- It provides a brilliant social networking interface to build trust with users, and a very functional e-commerce system for instant purchases
- Little Red Book currently has 100 million monthly users, with over 100,000 new users joining every day. Main demographic is 18-35 y.o females with 80% of users being under 30.
- Some of the more active visitors open Little Red Book up to 7 times a day.
- Has conversion rates of up to 20%, the highest rate attainable within the industry.
- Red Book has hosted events that encourage users to post based on the events. Similar to Douyin's Hashtag challenges. Makes for an easy opportunity to gain exposure and position themselves as industry leaders.
- Little Red Book also has Topics that offer greater opportunity for brands to partner with KOLs that are interested in featuring seasonal products.
- Use Hosted Events and Topics with Douyin's Hashtag Challenges whenever the opportunity arises.
- Use KOLs to spread a positive image of your products, so users will feel more confident in purchasing. Increase visibility and reputation.
- Pay attention to Chinese consumers and keep informed on reviews both negative and positive, to manage your brand's e-reputation. Pay attention to linkbacks to big social platforms like WeChat to ensure you are building your reputation all around, and stay active in standard e-commerce like Taobao and Tmall to broaden chances of sales and conversions.
- Pay attention to what your competitors are doing, and use live-streams on platforms with e-commerce functionality (Tmall, Taobao) to further exposure and positive feedback on Little Red Book.

# Section Four | Chinese Beauty Apps



Fashion and beauty is one of the most profitable industries in China, with \$164.22 billion being spent in the sector just last year alone, a growth of 26% YoY. More notably, is that China makes up for over one third of total global revenue within this sector. With this in mind, it's no surprise that Chinese users are all using apps to further 'beautify' their looks.

Leading these magic touch apps is MeituPic, one of the most popular photo-editing apps used by teenagers, adults and even seniors. With having the fashionable social media photo being priority number one for many younger users, apps like MeituPic are a blessing and ticket to internet glory. And for brands in fashion and beauty, these apps are the perfect ticket to connect with users and create invaluable brand-customer relationships that will last a life time.

# MeituPic

## 1. Overview

MeituPic (usually referred to as just Meitu, but not to be confused with the company Meitu that owns the app) is a Chinese photo-editing app that has consistently been a go-to for over 450 million users every month. Meitu was first released as a Chinese Mobile Internet company in October 2008.



In the decade it has been out, it has become a leader with its vision to transform the way people create and share the idea of "beauty". Meitu works by allowing users to change and alter a user's captured photographs with just a few taps and edits. It is more or less a convenient photoshop equipped to cameras that allows users to add a diverse array of filters and make up to a photograph within minutes, and ensures that just about any photo uploaded onto social media will be 'beautiful' by societal standards.



The company behind Meitu, despite seeing net losses over the past year, have continued to remain diligent in providing high quality updates and visions for their app. Meitu's next goal is focusing more heavily on global expansion. Earlier in January, the app was released to audiences in the UK, and it garnered amusing (and positive) controversy when users decided to experiment with Meitu's filters on Donald Trump, Vladimir Putin and Mark Zuckerberg -- just to name a few.

In order to further drive the firm's overseas expansion, Meitu has made efforts in rolling out localized features. Earlier this year, it also designed special features respectively for Songkran, the Thai New Year's festival, the Indian festival of Holi and Valentine's Day. For Mother's Day, Meitu also released new AR effects, frames and magic pen features exclusively for the celebratory period. The new features were available for download until May 31, and among them, users are able to turn pictures of themselves and their mothers into lovely carnations, or to surround themselves with a frame of carnations in selfies. Additionally, the users can draw on photos with the new magic pen feature, turning them into one-of-a-kind blessings for their mothers.

Meitu is at its core a photo editing tool that is an undeniable craze, and especially in China. Meitu in China is not just an app, but is a verb used to represent beauty, trendiness and youthfulness. Image and social status is a large part of day-to-day life due to the immense amount of time spent digitally. Meitu connects everybody together in that it appeals to people's desires to be accepted and validated among their peers. Everybody wants to look young and beautiful, and as long as that remains a natural desire within a technology and social-media dominated society, Meitu will continue prospering in relevance. As such, it is a perfect opportunity for brands to connect to audiences with any beauty-related topics, as demonstrated by brands like L'Oréal Paris, Lancôme, Maybelline New York and more.



## 2. Statistics

As of Feb 2018, Meitu has amassed over 1.5 billion unique users worldwide and engaged 480 million MAUs.

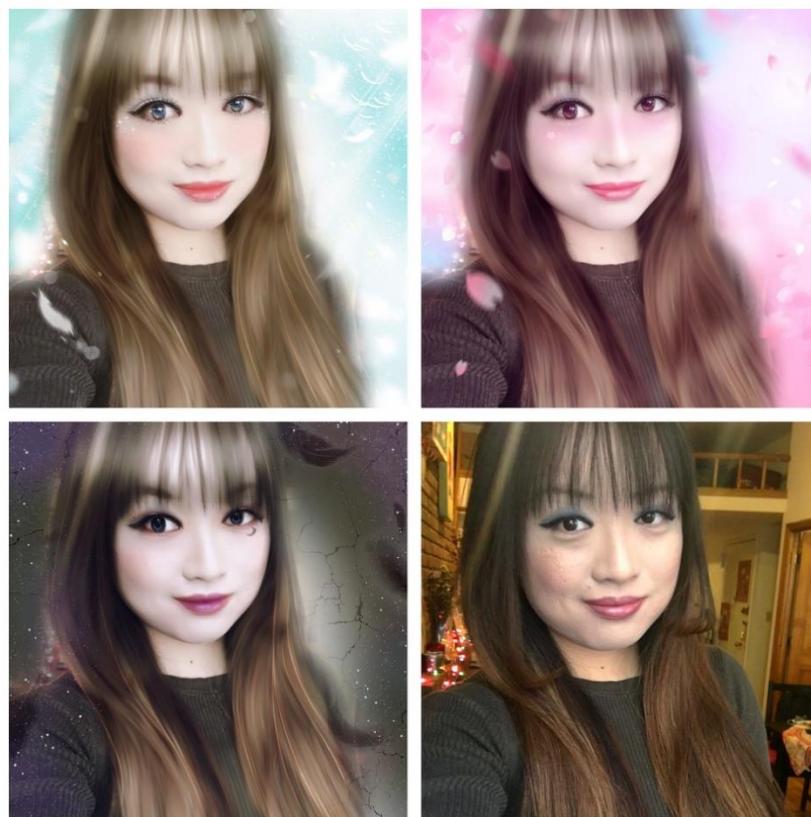
- It has successfully established its influence in overseas markets with more than 500 million users abroad.
- According to App Annie, Meitu has repeatedly ranked as one of the top eight iOS non-game app developers globally together from June 2014 to January 2017.
- Meitu says 78 percent of its users are women, and most are aged 19-35 years old.
- The 480 million MAUs post about 6 billion photos every month.
- Meitu typically garners 100,000 to 200,000 iOS downloads per day in China, according to data company Mobile Action.

- The Android version has between 10 million and 50 million installations, according to Google.
- According to Barrons (financial investment firm), over half of all photos that are published on Chinese social media have been edited through Meitu.

### 3. Analysis

#### *Unique Filters*

Meitu has currently worked with over 100 premier makeup brands, such as L'Oréal Paris, Lancôme, Maybelline New York, Guerlain and Estée Lauder to name a few. By using the beauty app, these brands have been able to promote more than 2000 makeup products. Despite these products not being sold on Meitu directly, brands can simply link with e-commerce platforms like Little Red Book or Tmall to counteract that issue.



### ***Content Marketing and Collaborations***

Urban Decay has also worked with live streaming apps for content marketing in conjunction with their filters strategy, so that influencers can discuss Urban Decay products in an authentic fashion.

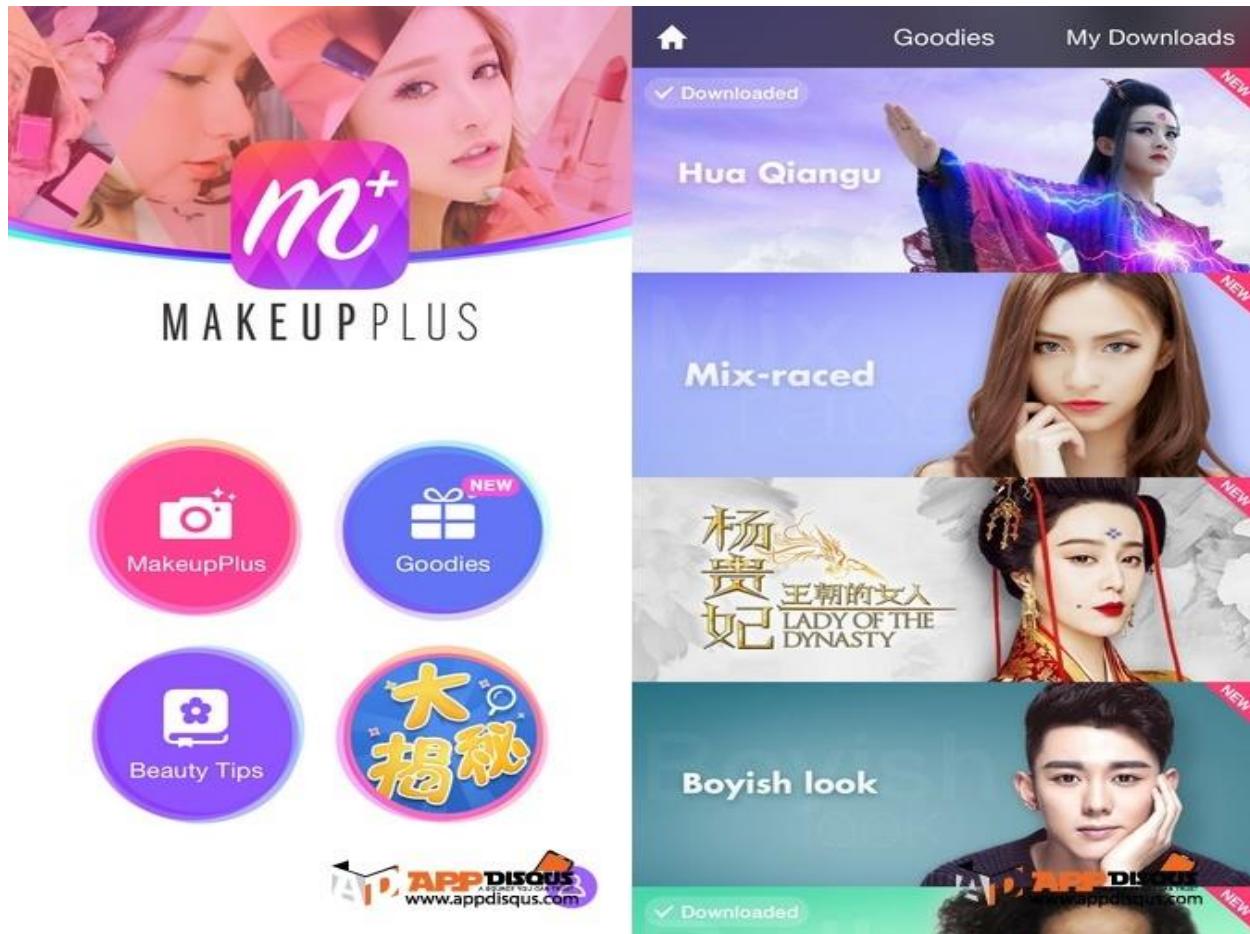
For brands, working with KOLs that are active on both Meitu and Yizhibo or Meipai (or any content platform of choice) will yield great results.

# Meitu - Makeup Plus

## 1. Overview

Meitu's Makeup Plus is a cutting-edge virtual makeup app created by Meitu (the same company behind the first previous beauty app MeituPic), and is a pioneer of its kind. This Meitu app allows users to apply hundreds of different lip products, make-ups, and more on their screen, providing them with a fairly accurate and realistic idea of how the product will look without needing to ever physically have it. According to the Google Play store:

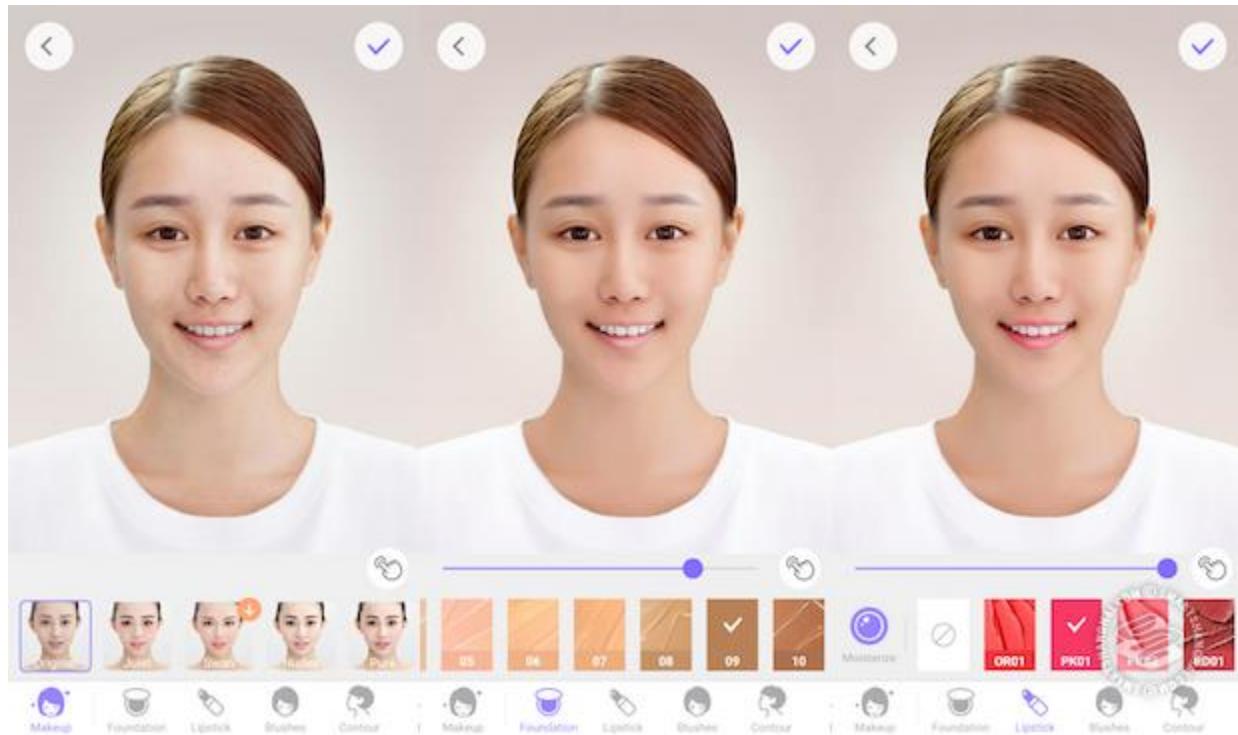
*"MakeupPlus is the perfect app to take your selfie editing to the next level. With MakeupPlus, you can give yourself a full virtual makeover – from lipstick, contour and eyelashes, to brows and hair color, faux freckles and glitter – to find a look you love, right from your phone's camera! "*



Along with the ability to apply different make-ups with a tap, Makeup Plus also provides several other features. Here are some:

- Hairstyles and colors, allowing users to take their customisation to the next level with the hottest hair dye trends so that they know exactly what they want before even getting to the salon.
- Makeup Plus Touchup, allowing users to try on exclusive full-face makeup filters created by the biggest names in the beauty industry like Bretman Rock, NikkieTutorials, Lisa Eldridge, Christen Dominique, Angel Merino and more.
- Exclusive video makeup tutorials by leading makeup KOLs, and teaches users how to create virtual looks in real life.

- Makeup Plus community where users can share and discover tips, tricks and new products.



Despite being basically a side app alongside Meitu, it is notable enough in the innovative leap that the company has taken, to be mentioned separately.

## 2. Statistics

Due to how recently this app was launched, there have been little statistics yet. So far, we know that it has over 100 million users worldwide since its launch a year ago. However, given that it is essentially just a diverging part of Meitu, it is safe to assume that any further statistics and demographics will be similar in nature to Meitu itself, and that it will likely have the same growth trajectory if not more

impressive; given that Meitu has build a solid foundation for Makeup Plus to prosper off.

### 3. Analysis

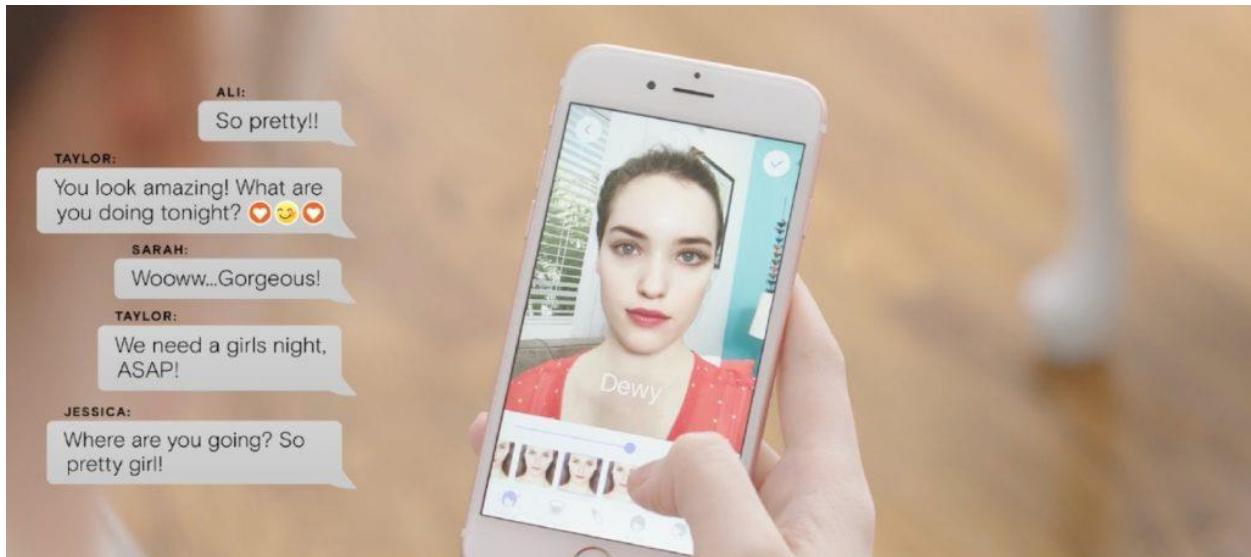
#### ***COUNTER***

Meitu's Makeup Plus app has partnered with luxury brands to launch its new in-app purchase service COUNTER. With COUNTER, Makeup Plus users can find out the ideal look for them, and then can buy products required for that look in real life right there and then without any hassle. Brands such as Clinique, Giorgio Armani, Lancôme, YSL, Charlotte Tilbury, Bobbi Brown and Max Factor have been named as part of the app's product portfolio.



Currently, users can only buy lipsticks through the COUNTER service. The technology promises however, to expand in the near future. For now, COUNTER's priority is to realistically imitate and improve the department store experience, counteracting the 'messy and time-consuming' traditional shopping method.

"The technology in Counter offers brands the ability to engage with shoppers like never before – allowing them to experience the product from anywhere, at any time," said Frank Fu, Managing Director of Meitu's Global Operations. As well as the financial pros of joining the app, the AR firm claims beauty brands can benefit from exclusive research. "Brands will be able to gain valuable insight into the try-on experience and access essential regional colour preferences from millions of MakeupPlus users around the world." adds Fu.



### ***Brick & Mortar Collaborations***

Makeup Plus can collaborate with actual brick and mortar shops, like with Lancôme who installed in January 2017 in its flagship store in Canton, six "magic mirrors" incorporating the virtual makeup technology of the MakeupPlus app. These virtual makeup test screens were also used by the Nars brand at its launch press conference in China last year.



## ***L'Oréal Paris***

L'Oréal Paris in particular, has had great success with Meitu's Makeup Plus app to attract interest. Urban Decay, a subsidiary of L'Oréal, has worked with Makeup Plus to create 3 unique Urban Decay filters, allowing users to try on the looks virtually. This partnership has benefitted Urban Decay through not just word-of-mouth but also through increased sales as customers are more willing to purchase products given that they know they will be satisfied.

## ***Pony Makeup***

The impact and continuing influence that a partnership with Makeup Plus should not be understated. In 2016, Makeup Plus worked with Korean makeup artist Pony, to launch up to six different versions of Pony's iconic looks. Months later, Korean celebrity Kim Tae Ho from South Korean MBC program "Infinite Challenge", posted a filtered picture of Park Myung Soo and Yoo Jae Suk (both very influential and popular Korean celebrities) to his Instagram.

In the picture, both of the celebrities were sporting 'Pony Makeup' from Makeup Plus, which by that time had become a trending filter which netizens and celebrities alike were using to take selfies with. This shows the value of having brand-made filters on Makeup Plus, as it is very easy for any filter to go viral amongst millions.

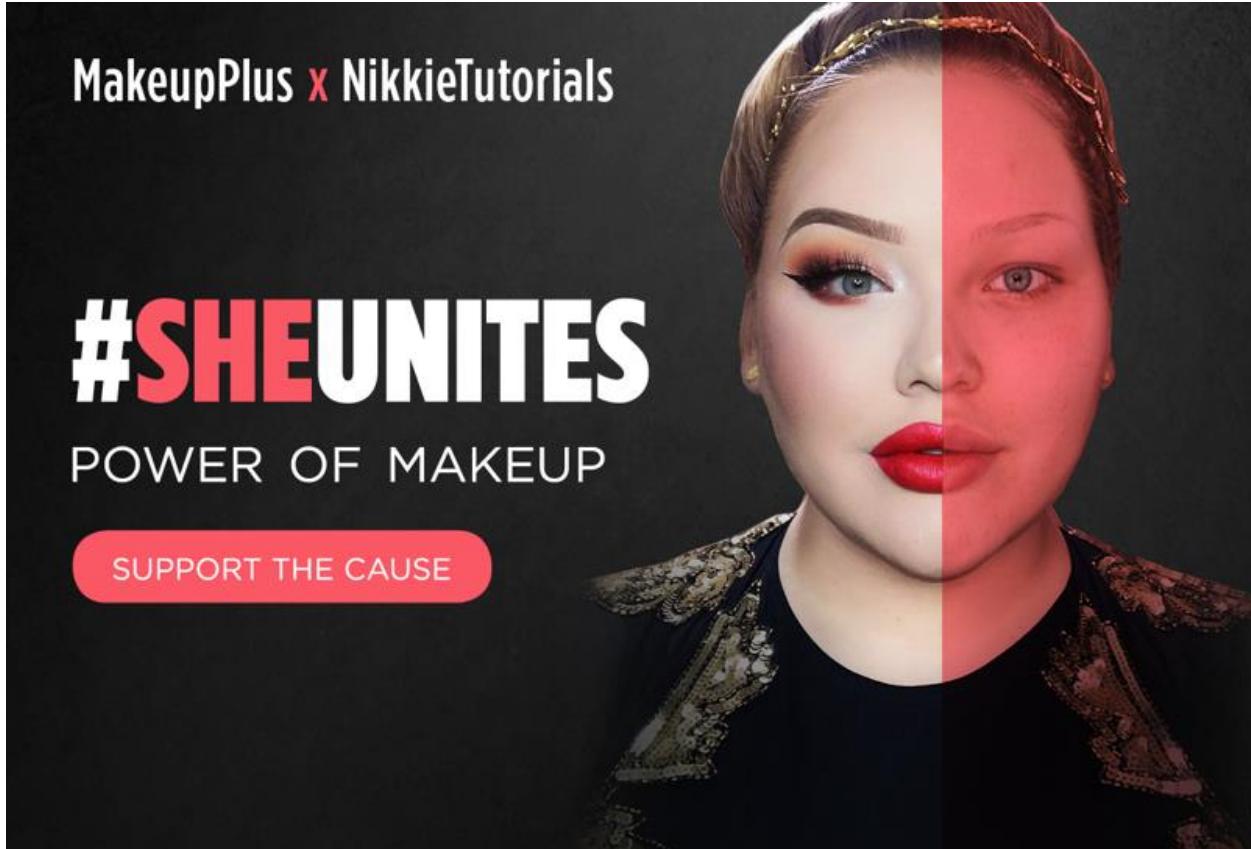
### ***Nikkie Tutorial***

Western KOL Nikkie Tutorials announced in an online video that she has partnered with Makeup Plus in an attempt to end make-up 'shaming'. Her goal is to promote confidence, with her partnership with the Chinese beauty app allowing for her users to instantly try her make-up styles.



Her partnership extends towards a women's empowerment charity as well, with the goal of raising \$100,000 through Makeup Plus. Together with the promotional

video, Nikkie also makes use of hashtags with #SHEUnites, further streamlining the process of awareness building. "Make-up shaming is real and make-up shaming has to be put to an end. What harm does it do to you to let someone play with make-up and feel their best selves?" says Nikkie.



The very positive nature of this cause aside, it also opens up exciting possibilities for luxury and beauty brands. Not simply the idea of a Makeup Plus partnership through online filters and brick & mortar tech integration, but in KOLs. Nikkie's Youtube videos receives well over several million views each, automatically becoming an ideal influencer pick for Western beauty brands. However, with the opinions of Chinese KOLs having such an enormous influence on the minds of consumers in the East, a targeted Makeup Plus strategy with the right Chinese KOL could easily rake in tenfold the amount of interactions.

# Section Four Wrap-Up

## MeituPic

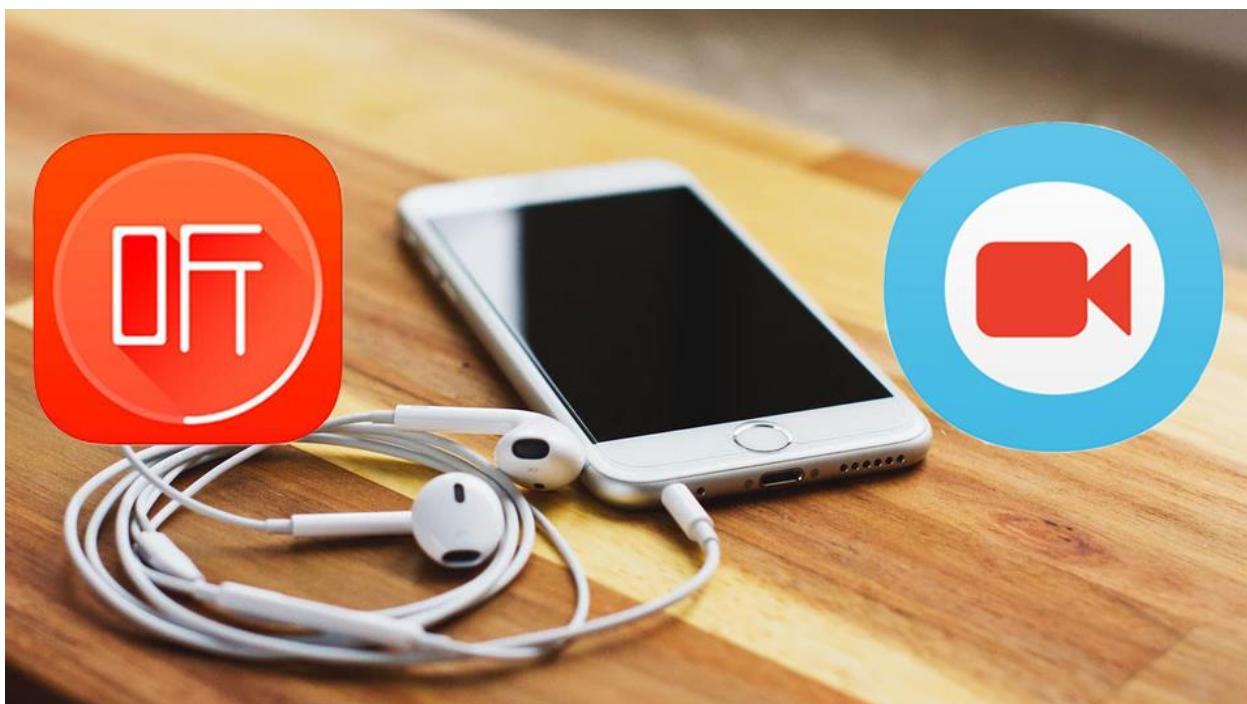
- A go-to app for 480 million users every month and about 1.5 billion unique users. About 80% of its users are female, with most between 19-35.
- 6 billion photos are posted every month, and over half of all photos on Chinese social media have been touched up on MeituPic.
- Works with over 100 premier makeup brands like L'Oréal Paris, Lancôme, Maybelline New York, Guerlain and Estée Lauder. These brands have been able to promote more than 2000 makeup products.
- Meitu is a convenient tool used commonly by most people with social media. Allows for insane photo editing capabilities within seconds, turning a self-conscious photo into one where users can feel like they are a beautiful celebrity.
- Brands on Meitu need to be linked to e-commerce platforms for products to be sold.
- Content marketing with KOLs that are active on Meitu and another content platform (Yizhibo, Alibaba Live Streaming, Douyin) will yield great results in getting conversions and word-of-mouth.

## Makeup Plus

- Makeup plus can be regarded as the cousin of MeituPic. While MeituPic focuses on brushing up photos within seconds, and allowing users to post a high quality photo with blemishes and etc. removed, Makeup Plus allows users to apply more complex filters, virtual make-up and even accessories, as to preview what make-ups suggested by brands and famous figures would look like.
- COUNTER is an innovative function that allows users to immediately buy the make-up loadout. They are working on allowing purchasing of a greater variety of products.

- Brands can collaborate with Makeup Plus by installing the virtual make-up technology into brick & mortar stores. This opens up opportunities for new campaigns.
- Makeup Plus and COUNTER also provides brands with valuable information about what their customers and online followers like and dislike. This is valuable to creating marketing campaigns on platforms like WeChat and Weibo, where knowing the audience you are targeting and what they want can make a drastic impact and make the usually high costs of campaigns worth it.
- Working with Makeup Plus, beauty brands can possibly upload their own makeups as filters which will very effectively boost brand awareness.

# Section Five | Audio & Video Advertising



While not as direct or grand as live streaming or partnering with a KOL in a campaign garnering a million sales and a front page in the local news, audio and video advertising in Ximalaya FM and Youku should not be ignored by any digital marketer. In fact, it contributes to the final aspects to a full and complete marketing strategy. Accessing the full depth of the Chinese social media landscape will require understanding the value of audio and video advertising.

Ximalaya FM receives over 6 million users listening in every day, with their top three podcasts each having more followers than the most popular podcasts on Audible, and Ximalaya's music billboard following exceeds the top charts on Spotify by over 10x. Youku boasts stats that are just as impressive, having upwards of 150 million viewers daily, compared to YouTube's 30 million. While other media platforms like Douyin and Yizhibo are undoubtedly better for KOL partnerships and large campaigns, Ximalaya FM and Youku should definitely not be

underestimated as a tool to simply grow brand awareness across a wider audience, that might usually not be reached.

# Ximalaya FM

## 1. Overview

Ximalaya FM is the largest online audio service platform in China, and lets users share and gain knowledge and personal experiences of 328 different categories (sectioned into 20 main categories). It opens up a new avenue of information within Chinese social media, through audio and personal podcast stations. With over 5 million hosts, and hundreds of different forms of radio shows, there is much untapped potential.



The audio platform was launched in early 2013, and has long led China's online audio and podcast market, ranking first in app stores as of the start of the year with a penetration rate exceeding five percent, according to a report from mobile internet consultancy iMedia Research. In 2014, Ximalaya FM completed its second round of funding, securing \$50 million yuan. By the end of 2014, it was valued at over 4 billion yuan. Ximalaya FM features some of China's most notorious KOLs, like Luo Zhenyu, Mi Meng and Guo Degang.

Along with this, they also feature Sina (company behind Sina Weibo), among other notable brands. Along with this, they have strategic partnerships with 60 big automotive brands like Toyota, BMW, Ford, Cardilac, providing in-car entertainment systems for drivers and passengers.



With such a powerful opportunity for influence, many brands have jumped on the platform to sponsor shows, and create their own channels and branded content (Durex), and others have partnered with Ximalaya FM to increase brand awareness and buzz (McDonalds and Pizza Hutt With a noticeable lack of other competitors in China's audio app industry, Ximalaya is an obvious first choice -- and partnering with the right KOLs and podcasts will easily skyrocket brand awareness within China if done right.



## 2. Statistics

Ximalaya FM is the most prominent audio app in China, sitting at 40 million monthly users. This is compared to Qingting FM (the audio app with the second most active user base) which only has 18.3 million.

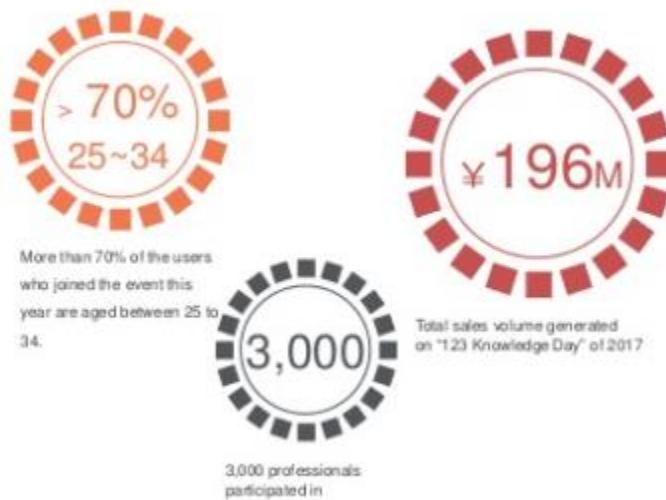
- 6 million daily active users listening in to over 10,000 professional daily uploaded audio content. Average time spent on the app is 125.24 minutes per day.
- 51% males and 48% females
- 56% of users are between the ages of 25 to 35

- Only 5% of users are over 40, and 23% of users are under 24.
- User activity in general spikes at 8 am in the morning, then decreases after 10. It then begins climbing at 6 pm, peaking at 11 pm.

### 3. Analysis

#### *Taobao of Media*

Yu Jiangjun, the founder has gone on to say he wants to make Ximalaya FM the 'Taobao platform in the media world'. As far as numbers are concerned, Ximalaya FM has been on a good track. To achieve this, Ximalaya set up its paid-content column in June 2016, to encourage professionals to sell their knowledge online. On the third of December, they launched the '123 Knowledge Day' to establish the first online paid-content festival in China.



The event netted a total sales volume of 50 million yuan within just 24 hours, the same revenue of Alibaba's first Single's Day sale back in 2009. The following year, the same event garnered a whopping 196 million yuan. According to Chinese

media, paid podcasts accounted for over 50% of the platform's total revenue in 2016, with the ARPU (average revenue per user) being roughly 90-100 yuan in the first three quarters in 2017.

This shows that users that are using Ximalaya FM are not worried about spending money, as long as what they are getting back in return is something they deem valuable. This is positive for brands, as it simply means that a following on Ximalaya may be difficult to acquire initially, however once a brand has proven their value and acquired the attention, they will have loyal users that are willing to listen with intent, and will be more likely to spend in turn.



### ***Top Podcast Stations***

Ximalaya FM offers hundreds of different stations for users to listen in to, from music, to comedy, to business and more. The top 5 podcast stations are as follows:

**Ximalaya Good Voice:** One of China's more popular music billboards, with 62 million followers. Considering that top billboards on Spotify (a music dedicated app) usually have no more than 5 million followers, the Good Voice station proves that Ximalaya is flourishing.

**Logic Show:** Hosted by Luo Zhenyu, one of China's most influential KOLs with 6.7 million followers. Topics on the Logic Show are generally about Business, Society, and History.

**Guo Degang's Xiangsheng:** A comedy performance hosted by Chinese comedian and KOL Guo Degang with 6.6 million followers.

**Funny Stories:** Ximalaya FM also owns a similar comedy podcast named Funny Stories, with 5 million followers. Similar to Guo Degang's Xiangsheng, their comedic stories and jokes are a big hit.

**Good Night City:** A late night show broadcasted every night to 5.3 million followers, discussing about urban life: be it work, daily occurrences, news and more.

Brands can pick the right KOLs and channels to partner with, in order to spread awareness of their brand and product. For example, a new start-up could work together with Luo Zhenyu on the Logic Show to provide insight on their brand's journey. Brands selling products that are used commonly by everybody (like TVs or cars), can make a guest appearance on Good Night City discussing future quality of life improvements to current products or products in the works.



## ***Brand Strategy***

As mentioned earlier, there is a powerful opportunity for influence. Many brands have been jumping onto Ximalaya FM to create their own channels, or partner with bigger channels and KOLs to promote their brands. As of last May, more than 10,000 brands have collaborated with Ximalaya.

Umbrella maker Jiaoxia promoted their UV-blocker on Ximalaya by having audio blogger Caicai produce an episode about sun protection. Within the 24 hours that episode was distributed to her over 1 million followers on the streaming platform. In just the first minute, over 2,000 sun umbrellas were sold. By the end of the first day, Jiaoxia had successfully sold 20,000 sun umbrellas.

Another notable brand that has used Ximalaya for promotion is Pizza Hutt, who used the audio app to promote their new menu. Pizza Hutt would provide Ximalaya's top 50 podcast hosts a meal allowance for their new menu. These 50

hosts would then mention the offer in podcasts, and ask their audience to participate in the chance to win an allowance by sharing stories of themselves to Pizza Hutt in the comments. In 10 days, the campaign received over 2 million interactions from listeners.



LinkedIn launched their own podcast in March 2018, featuring interviews with successful young professionals. The podcast has received over 150,000 listens so far.

## ***Branded Ads***

As users have the option to skip past branded ads, companies on Ximalaya FM are working towards making their audio ads more entertaining and organic, becoming a part of the show as opposed to a sectioned off intermission.

This is important, as it turns ads into something that listeners will not only not skip, but will also pay attention towards. Such branded content marketing great for building brand awareness and education.



# Youku

## 1. Overview

Youku Tudou (usually referred to as just 'Youku') is one of the top social media platforms in China, brimming with over 150 million users every day. Youku Tudou describes itself as a "leading multi-screen entertainment and media company in China".



Originally Youku and Tudou were two separate platforms competing with one another. This was the case until 2012, when Youku sought to purchase Tudou, ultimately creating an industry giant that became worth over one third the share of China's video market, named Youku Tudou. This industry giant would then be purchased by Alibaba in November 2015, and would continue to grow into the current iteration of its platform.



Users access most content for free and the company monetizes user traffic through video and other forms of online advertising. As of 2013, the company had approximately 5,900 movies, 2,200 television shows, and 800 variety shows in its content library. Youku has forged partnerships with nearly 900 brand advertisers over the past several years, including household names like P&G, Coca-Cola, General Motors, Apple, Lenovo, Samsung, and China Mobile.

Almost half of China's population are browsing videos on their mobile daily, and each are spending an average of 2h 43m watching content. Youku being a merge of two of the most popular video apps in their time, has naturally proven to be a hit amongst competitors time and time again. According to a survey done by Hootsuite and WeAreSocial, Youku is the third most popular social media platform tied with Sina Weibo. With the wealth of user-generated content, Youku is described as China's YouTube more than any other video platform in the country.

JAN  
2018

## TIME SPENT WITH MEDIA

SURVEY-BASED DATA: FIGURES REPRESENT RESPONDENTS' SELF-REPORTED ACTIVITY



AVERAGE DAILY TIME  
SPENT USING THE  
INTERNET VIA ANY DEVICE



**6H 30M**

AVERAGE DAILY TIME  
SPENT USING SOCIAL  
MEDIA VIA ANY DEVICE



**2H 00M**

AVERAGE DAILY TV VIEWING TIME  
(BROADCAST, STREAMING  
AND VIDEO ON DEMAND)



**2H 43M**

AVERAGE DAILY TIME  
SPENT LISTENING TO  
STREAMING MUSIC



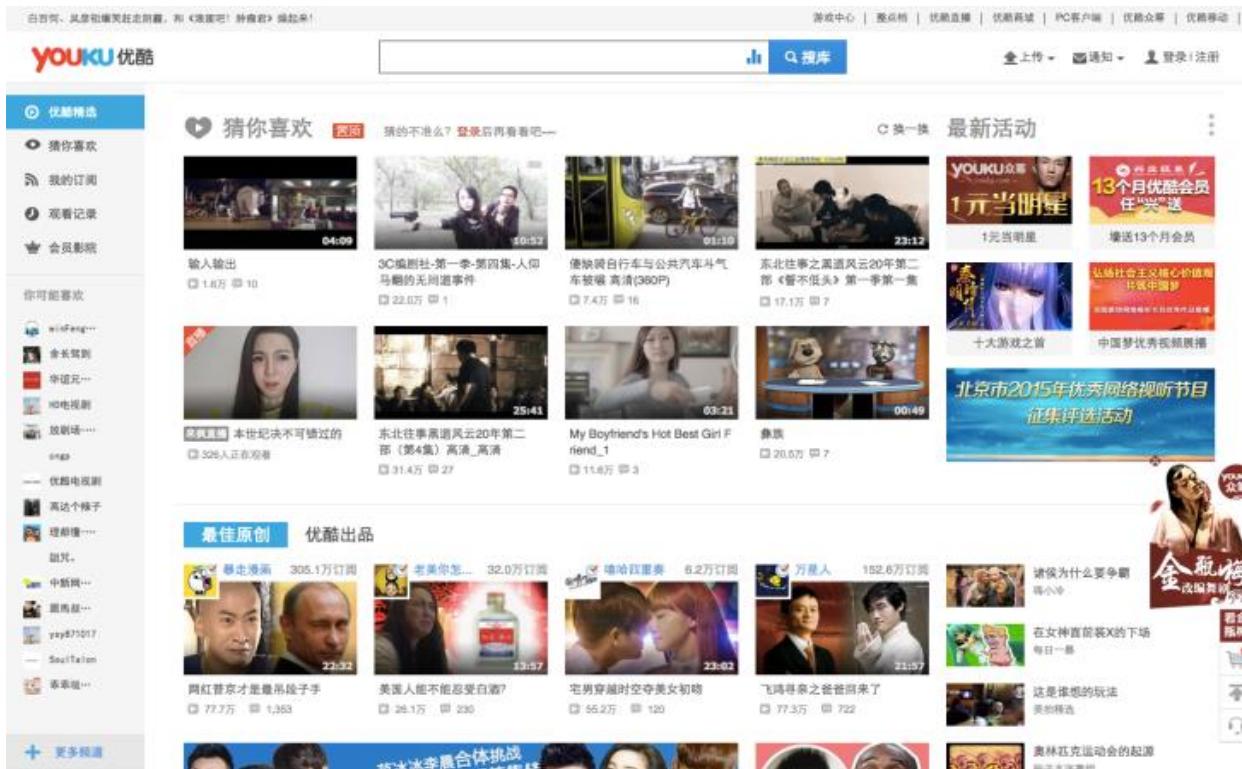
**1H 04M**

12

SOURCE: GLOBALWEBINDEX, Q2 & Q3 2017, BASED ON A SURVEY OF INTERNET USERS AGED 16-64.  
NOTE: TIME SPENT USING SOCIAL MEDIA INCLUDES SOCIAL NETWORKS AS WELL AS MESSENGERS / CHAT APPS.

 **Hootsuite**  **we  
are  
social**

As content is king in China, the quality of the content must be rich, specific and catching. Chinese people spend a lot of time looking for information about all topics. For brands, a common example of this is the Chinese consumers' natural tendency to want reviews and suggestions online before making a purchase. Because of this, there is a glaring importance of providing high quality content for viewers on Youku, content that is enriching and will stand out.



## 2. Statistics

With a user base of 580 million monthly unique visitors, Youku Tudou's content is accessible across multiple devices making them one of the top internet entertainment and media destinations in China.

Youku has over 150 million daily active users, with over 1.18 billion video views per day. Youtube in comparison, gets an average of 30 million users per day, albeit with a view rate of 4 times that of Youku.

Unfortunately we are unable to provide any valuable information on the platform's demographics, as neither Alibaba nor Youku have released any relevant statistics outside of MAU/DAU.

## 3. Analysis

## Advertisements

Youku pause ads are the ads that are displayed whenever a video is paused. These ads stay on until playback is resumed. As these ads are typically static, it can be effective if a video is paused multiple times. Viewers will see it every pause, and as such, increases the impression rate for the same user.



These types of ads are usually static, but can be quite effective because if a video is paused several times then the viewer will see it every time. This increases the impression rate for the same user. There are several different types of video ads that brands have access to, each suitable towards different budget and needs:

- Pre-roll Ads: Your ad is displayed before the start of the video.
- Post-roll Ads: Less expensive than pre-roll ads because users can skip it. Displayed at the end of the video.

- **Banner Ads:** A custom banner that can be displayed at the bottom, middle or at the top of the page. Ads displayed at the bottom are the cheapest, but require users to scroll til the bottom of the page.

While ads are a touchy subject for the relationship between consumer and brand, Youku has made attempts over the years at becoming more subtle and streamlined with advertising, particularly when working with big ad spenders. In 2016, Unilever-owned shampoo brand Clear became the title sponsor for Youku's popular talk show 'Mars Intelligence Agency'. During the show, a Clear product was placed on stage, and Youku even customised a song for the brand in an episode since viewers are more likely to understand a product value once they have emotional investment in the content.



Youku also partnered with China's biggest cocktail brand Rio during a season of 'Sing! China', a Chinese version of 'American Idol'. During the contest, Youku and Rio experimented with an ad-free format, where there would not be a single commercial break throughout the show (aside from a five second long pre-roll advertisement). In return, Rio would have access to an exclusively sponsored landing page of 'Sing! China' on Youku. The banners would redirect any viewers to Rio's flagship store on Alibaba's online retail platform Tmall, which would be

filled with seasonal products in collaboration with the singing contest that was going on, along with their usual product line.



### ***Online viewing analytics***

Youku Tudou offers content creators an analytics feature that enables brands to identify their audience by providing the vital information regarding the viewer. These include demographics, geolocation, browsing technology and language. This enables brands to integrate targeted adverts or other location-related content into their content.

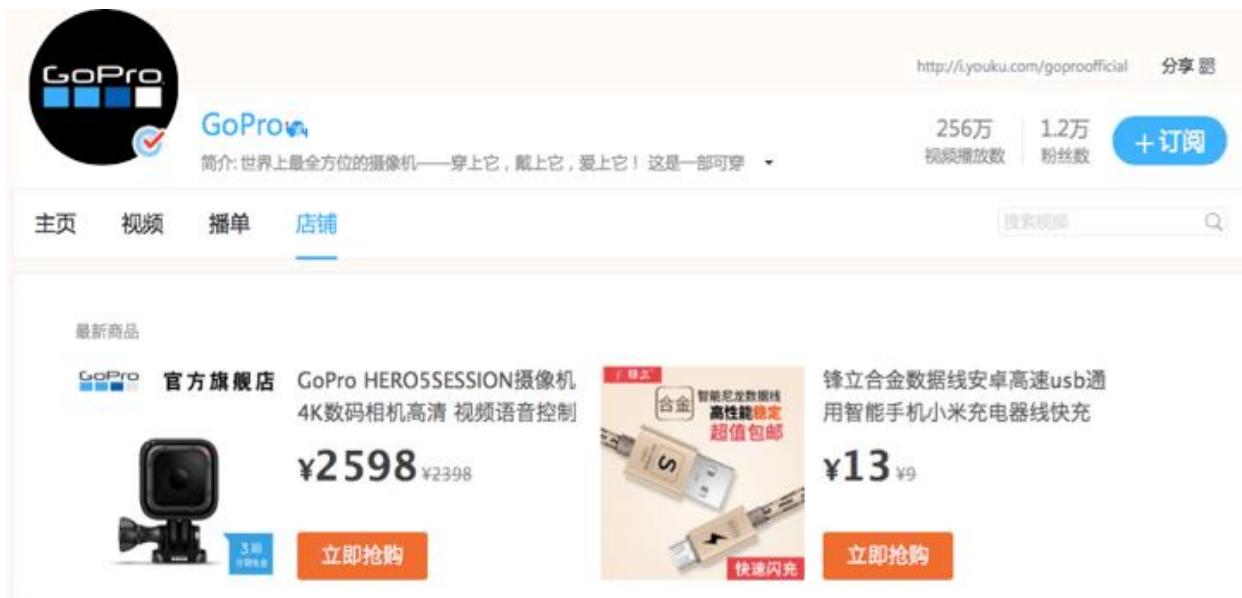
Along with demographics, Youku's analytics also allows marketers to view engagement metrics like time spent viewing a page and frequency of return visits. All of this is information that is extremely valuable for online marketing efforts.



## ***Official Channels***

Brands can create their own channel on Youku, showing ads or product reviews. A Youku official channel has most functions that a Youtube channel does, however with some additional functions. For example, brands can add a short promotion or campaign video after one of their general ads. Other functions include original content verification, polls, adding text layers to videos.

The biggest advantage that Youku has over other video services like Youtube, is that since Youku is partnered with Alibaba; brands can set up online stores in the menu bar on Youku. This allows users to buy what they see in the videos immediately. This is key in separating Youku from other video platform, providing a new viewing experience for users while boosting sales at the same time. An example of a brand that has benefited off this is GoPro. Their official account on Youku has over 2 million video views and 12,000 fans. Their menu button has a 'Buy Now' button for their online shop where product are displayed, which links back to GoPro's official T-mall flagship store.



## *Live streaming and E-Commerce*

With Youku's orange 'Buy Now' button courtesy of being owned by Alibaba, Youku has greater opportunities to convert viewers into consumers. Thanks to Youku's superior e-commerce functionality, brands using the platform can also live stream campaigns on Youku to promote products or services and also get conversions.

Chinese singer & actor Lin Yilun demonstrated this capability in June 2016 where he held a 2 hour live stream on Youku. During the live stream, he introduced a new chili sauce. The live stream received over 7 million views, and more than 3 million jars of the chili sauce were sold.



### ***KLM Airline's Miffy Journey Series***

In 2012, the Dutch airline launched a Youku campaign promoting European destinations, with the goal of increasing followers on their Chinese social media front. The campaign utilised the sentiment and nostalgia of Chinese consumers, along with an undeniable cute factor. The two combined were sure to grab anybody's attention.



The campaign was built around Miffy, a small female rabbit that was featured in a series of popular books in China. Through the campaign, the little rabbit would fly all over the world on a KLM plane. She would keep a diary of her journey, which featured information about KLM routes and services. Her journey to exciting European destinations like Paris, Rome, London and Amsterdam were posted on Youku, and watched by over 4 million people.

By the end, the airline had gained more than 88,000 followers in China, and would be fundamental in providing KLM with the social media presence needed to tackle other platforms.

### ***Burberry***

Youku has provided Burberry with a solid platform to launch seasonal campaigns, along with promotional films of collections and exclusive videos. One of Burberry's most popular videos on Youku was a 2012 promotional video that was launched specifically in correlation with the fashion house's Autumn/Winter collection of that year. As demonstrated with other platforms in Chinese social

media, timing can make or break a strategy -- for Burberry, it definitely helped 'make' it.



**节目简介**

**Burberry** ★★★★☆ 8.4  
大陆 / 时尚 播放:832,158 顶/踩:1,388/91 评论: 93

Burberry创办于1856年,是英国皇室御用品,长久以来成为奢华、品质、创新以及永恒经典的代名词,也是最能代表英国的品牌,旗下的风衣作为品牌标识享誉全球,其风衣在第一次大战时曾被指定为英国军队的高级军服。为展现Burberry的英伦魅力和品牌的态度与精神, Burberry官方优酷视频空... [查看详情](#)

**综艺检索** [更多条件](#)

按地区: 大陆 台湾 韩国 日本 美国

按类型: 优酷出品 脱口秀 真人秀 音乐 益智 美食 时尚 优酷牛人 访谈 旅游

按综艺节目名称:  **搜索**

**剧集列表**

图片	集数	详情
	11:35	<a href="#">Burberry Prorsum 2012 春夏系列男装秀</a>
	01:02	<a href="#">Burberry 2011秋冬系列 广告</a>
	01:15	<a href="#">Burberry 2011秋冬系列 配饰广告</a>
	00:32	<a href="#">Burberry Prorsum 2011 秋冬系列广告 - Look 1</a>

**优酷指数 综艺排行榜 TOP50**

全部	大陆综艺	台湾综艺
热播分期		
01	让梦想飞 中国最牛人 第四期	让梦想飞
02	非诚勿扰 110612	非诚勿扰
03	欢乐嘉年华 刘青云 梁朝伟 ...	快乐大本营
04	谢贤香港现身 谈及柏芝态度...	优酷娱乐播
05	中国达人秀 第二季 110619	中国达人秀

The video itself would feature important glimpses at Burberry's latest products, along with a short segment with a British actress alongside a musician who composed, and performed an exclusive song.

## Pizza Hutt

In 2016, Pizza Hut conducted a Youku/Weibo video campaign named "Sharing Love is Natural". The campaign utilised Youku's superior video functionality, along with Weibo's more user-brand interaction friendly interface to maximise interactions and views. This was rounded off with a touching theme, and KOL influence too.

Pizza Hut recruited Chinese actor Hu Ge, who shot a 3 minute video to show how ordinary people love to share in their daily lives (and obviously with a healthy amount of product promotion for Pizza Hut). The campaign then invited other KOLs and followers alike to shoot their own related videos and share their own stories.



In just three months, all the videos that were part of the campaign had tallied over 800,000 views, and with plenty of engagement from KOLs and normal users alike.

## ***Youku's Most Touching Campaign***

Youku Tudou shows that when all the prior marketing elements are skillfully integrated together, there is almost no limit to the passion and outreach of a campaign. In 2014, during the Chinese Spring Festival, Youku was commissioned by Intel to create a marketing campaign for them, themed around the festival. They created a series of micro-films, touching on topics like "family reunion".

Youku took this a step further, and asked users to use their tablets to create their own short documentaries related to the theme of "Heartfelt Gift for New Year". What could have very easily turned into a flop, became the sole contributor to one of the most touching Chinese Spring Festivals in history.



Many of the videos launched for the campaign received over 5 million video views within the first day of posting. One of the microfilms 'Lanterns in Old Town' in particular, moved millions of Chinese, striking a chord with its melancholic and deeply empathetic themes. Intel presented this micromovie at its signature global

event Intel Developers' Forum, also inviting the creator to the stage as guest speaker.

With the combination of selecting the right themes to emotionally connect, leveraged with the perfect timing and setting, Youku's campaign of microfilms and documentaries received a total of 73.2 million video views. The Intel brand received over a staggering 2 billion impressions from all the films, which was benefited by a costly but highly effective combination of pre-roll promotions, taglines, and banner ads.

## Section Five Wrap-Up

### Ximalaya FM

- Ximalaya FM receives over 6 million users daily and 40 million monthly. Average time spent on the app is over two hours.
- Male to female is mostly equal, and 56% of users are between the ages of 25 to 35.
- User activity in general spikes at 8 am in the morning, then decreases after 10. It then begins climbing at 6 pm, peaking at 11 pm.
- Ximalaya FM is working towards becoming the “Taobao platform of the media world” in that its users will pay for knowledge and content. Ximalaya FMs are more than willing to shell out money, however they are also more attentive and mature than the typical consumer.
- Ximalaya FM has hundreds of popular podcasts to choose from, with the most popular having upwards of 5 million followers. These podcasts are listened to consistently from its followers, and so joining in on a podcast can be great in spreading awareness of a brand or product.
- The audio app has received over 10,000 brands partnering with it due to the potential it offers in reaching new audiences.

- Umbrella maker Jiaoxia launched a new umbrella with audio blogger and KOL Caicai promoting it. In the first minute, over 2,000 copies of the umbrella were sold.
- Pizza Hutt distributed special promotions to the top 50 podcast hosts on the platform for them to offer as prizes, all the listeners would have to do was share stories of themselves in the comments. In little over a week, Pizza Hutt received over 2 million interactions.
- Ximalaya FM encourages companies to make their audio ads more entertaining and organic, and so quality in ads will be important as users can just otherwise skip it without paying attention.

## Youku

- Youku has 580 million monthly users and 150 million daily users. Youku gets about 1.8 billion video views per day.
- Youku Tudou is a result of Youku merging with Tudou (a competitor at the time). They were purchased by Alibaba in 2015.
- Youku is partnered with nearly 900 brand advertisers, including household names like P&G, Coca-Cola, Apple, Lenovo, General Motors, Samsung, China Mobile etc.
- Youku offers a wide selection of ads, from video ads to banner ads. These allow brands to tailor their ad strategy towards their budget. E.g. brands with a restrictive budget would maybe indulge in a top banner ad to catch the user's attention immediately, then cut costs through using a post-roll ad during videos.
- Youku also offers detailed analytics for brands, that lets them identify their audience's demographics, geolocation, browsing technology, language along with engagement metrics like time spent on a given page, frequency of return visits and so on.
- Youku has official channels which act as better YouTube channels. Brands can add promotions or campaign videos after their general ads. They can include original content verification, polls, adding text layers. Most importantly, since Youku is a part of Alibaba, they also gain Alibaba's e-commerce functionality from Tmall and Taobao, allowing brands to promote

special products on their page that can be purchased with just a click of an orange button.

- Along with being able to list out purchasable items, Youku's relationship with Alibaba also means that they can host live streams with the opportunity to convert viewers into consumers. Chinese celebrity Lin Yilun demonstrated this when he held a live stream introducing a new product. By the end of the two hour live stream, he had gotten over 7 million views and more than 3 million products were sold – a conversion rate of approx. 42%.

# Conclusion

As we draw to the end of this guide, it is important to look back and reexamine how each of these platforms work together within the Chinese social media landscape. The common goal throughout most Chinese marketing strategies is to increase brand influence, and eventually conversions. With the apps listed in this guide, brands will have everything that they need for a solid and far-reaching strategy. For your convenience, here is a basic layout of how they could be integrated together:

1. Growing a brand's range of influence for a particular audience - e.g. WeChat and Weibo, providing updates and creating a social presence; Meitu and Douyin, building connections with the follower through products/KOLs, reviews on Little Red Book etc.
2. Directly increasing engagement and relations with that target audience - e.g. interacting with users on Little Red Book, through live streams such as with Yizhibo and Alibaba Live Streaming etc.
3. Growing brand awareness across a broader audience on the side through relatively quieter marketing - e.g. podcasts on Ximalaya FM, using Youku's diverse range of ads to reach more Chinese internet users etc.
4. Finally converting visitors/followers into consumers.

**Important note:** The apps that have been selected for this guide were selected due to their influence, popularity and platform potential at the time of writing (August 2018). However, there are many other alternatives that could have just as much value as the ones listed, if not more. It all comes down to your brand, and what your brand needs. And as such, treat this guide as more of a compendium of top apps needed for a strong social presence in China, and don't hesitate to look for other potential apps to supplement the ones discussed in this guide. Below is a

brief list of apps and platforms that we did not mention, but could have been in our guide:

- Meipai (Instagram type App)
- Miaopai (Live streaming)
- Tian Tian Pi Tu (Beauty App)
- Toutiao (News & Information)
- QQ (Instant Messaging)
- Renren (Social Media App)
- Douban (Lifestyle)
- Meituan Dianping (Yelp type App)
- Diandian (Tumblr type App)
- Zhihu (Quora type App)
- Mafengwo (Travel)
- PengYou (Social Media)
- FaceU (Beauty App)
- Camera360 (Beauty App)
- Inke (Live streaming)
- Huajiao Live (Live streaming)