The RED Edition

Issue 8

REDFERN DIGITAL

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Message From the CEO

Dear Readers,

Welcome to Issue 8 of The Red Edition. The last few months have seen huge changes and promising growth in the Chinese market following the opening of the borders. Retail sales increased by 10.6% in March compared to a year ago, which was the highest growth since June 2021. Between January to March, retail sales grew by 5.8% and during labour holiday, China witnessed the highest domestic tourism numbers since pre-COVID-19. After a difficult three years, we are seeing E-commerce sales rebound and brands regain some of the loss they've experienced due to the pandemic. For many brands that work with distributors, they are yet to see this increase as their partners are selling excess stock from Q4 and Q1, but category sales are on the climb and the results are soon to show.

China now accounts for 45.3% of global online sales and shows no signs of stopping. For many categories across Nutritional Health and Personal Care, the percentage of online retail compared to traditional retail is over 50%. Therefore, the power of the online channel cannot be ignored by brands in market. Brands that have been reactive and flexible in their approach will have continued to see a shift in channel focus and a growth in online sales over the last 3 years. For some, relying on only the main B2C E-commerce platform Tmall may have meant struggles to gain market share and possibly even declines in sales.

With the 6.18 Shopping Festival just around the corner, most brands are preparing for the first non-COVID-19 influenced sales festival in the past several years. This means that for most brands, lockdowns, consumer purchasing power and accessibility can no longer be blamed for any dwindling sales.

With only a couple of weeks left until the 6.18 Shopping Festival presale season, 6.18 will be a great test for brands in terms of how their product portfolio is going to perform in a post-COVID-19 China. As mentioned in previous issues, brands need to be planning a cross-platform E-commerce and media launch to preheat for this festival. For many smaller brands, 618 has become a key calendar festival where brands can experience much less competition in comparison to other key sales periods such as 11.11 and 12.12.

Livestreaming continues to dominate most discussions around key sales for the festivals. However, brands need to be aware that the power of livestreaming on public platforms continues to wane. Instead, Douyin has risen as the real powerhouse behind any livestreaming activity for brands that cannot sign with the top live streamers on Tmall. Understanding and leveraging this channel is key to building out sales across the major public platforms in the future, especially as repeat purchases on Douyin are much lower.

In terms of categories, brands always need to be on the lookout for what is trending in China in order to understand how well their sales should be tracking. The pet food industry is currently the talk of the town, with a 2,000% growth rate that shows no signs of stopping. All pet food brands, large and small, need to be focusing on the industry before it consolidates. Other noticeable mentions include adventure and the outdoors, functional food and beverages, and anything that encompasses healthy living.

The interesting elements regarding marketing and E-commerce in China is that a lot of these key market learnings are very transferable to other Asian markets and in particular, South-East Asia. As outlined in this issue from our Ho Chi Minh office, KOL and KOC marketing are dominating online spend in Vietnam with over 77% of Vietnamese having purchased a product because of influencer endorsement. For many of our clients in South East Asia, the strategy being pursued is one that we would have implemented in China only 5 years earlier. Brands need to understand that success across Asia is more linked than ever.

Interestingly, localisation in Asia is becoming one of the most important elements of brand market entry. As more and more brands compete across the online space, the strategic options for growth become limited. Thus, having a brand and product that stands out above all else is crucial and is the core to cracking the Asian markets. Brands need to be malleable.

- Ryan Molloy, CEO

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The Trends To Know **in China** for 2023

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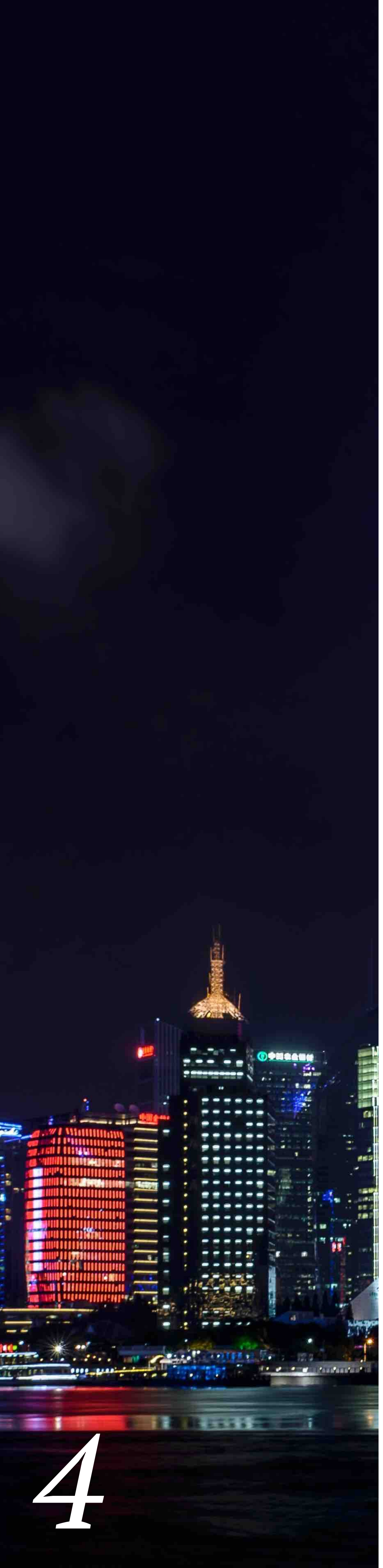


The Trends to Know in China for 2023

By Sandra Weiss, RedFern Digital

As we near the middle of 2023, retail sales in China are seeing marked improvements during the first few months following the complete removal of COVID-19 regulations. In the first quarter of the year, retail sales rose steadily at 5.8%, and in March, there was a notable uptick, with a 10.6% increase in retail sales compared to last year. This represented the highest growth rate since June 2021.

In this article, we'll go over the top 5 trends that brands should watch out for in the second quarter of 2023.

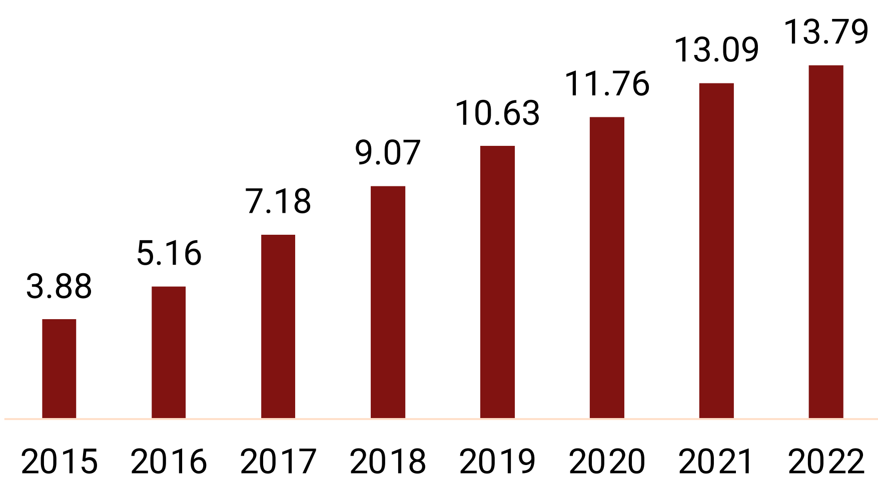
1. E-commerce Continues to Rise

As the world's largest E-commerce market, China had over 1 billion consumers shop through e-commerce channels in 2022, making up 45.3% of all online retail sales in the world. Within China, online sales channels saw 51% of all sales in the country.

Throughout the COVID-19 pandemic, E-commerce growth has continued, and this trend is unlikely to stop even with COVID-19 restrictions removed in China. This is especially true as Gen-Z consumers, who grew up with technology and are the most digitally savvy generation, are continuing to increase their purchasing power.

Brands who want to succeed in China must consider online sales channels in their market entry or expansion plans and reach customers where they are shopping for products.

GMV of China's Online Shopping Market from 2015 to 2022 (in trillion RMB)



Source: Statista – in cooperation with MOFCOM China, February 2023

2. The Metaverse: China Edition

Over the past year, the Metaverse has become increasingly substantial in China, with more brands testing the waters and expanding into this segment. The metaverse can be explained as a virtual world that allows for greater integration of the digital and physical, in areas ranging from socialization and shopping to work. Technologies include those within the fields of virtual and augmented reality.

The metaverse presents uncountable new opportunities for brands, businesses, and developers, as shown by the over 16,000 metaverse related trademark applications among Chinese players. Many of the big tech companies in China such as Alibaba, Baidu, Tencent, and ByteDance, have released their own metaverse ecosystems, wherein users can create avatars and interact in a virtual environment. In fact, since the second half of 2021, over 37 digital collections have been released by brands on Alibaba's Tmall Luxury Pavilion, purchased by thousands of customers.

Compared to other countries such as the US and the UK, Chinese consumers are showing greater interest in the metaverse, especially as it relates to gaming. In fact, among Chinese consumers who are interested in the metaverse, over 82% are optimistic about its future benefits, which is also much greater than among Western countries.

3. Virtual Influencers: The New Celebrities

AI-generated virtual influencers are amassing huge followers and becoming celebrities in China, with the industry expected to increase from $870 million in 2021 to $6.7 billion in 2025. This comes at a time when China is cracking down on human celebrities and influencers, with virtual influencers appearing as safer alternatives who are scandal free.

Technological advances have allowed these virtual influencers to hold livestreams, walk down virtual runways, or pose alongside products, just as a real influencer can. Especially among fashion brands, working with virtual influencers in China has become increasingly common.

Although at the moment, the fanbase for human influencers continues to remain much larger than the growing fanbase of virtual influencers, they are certainly a trend to keep an eye on.

4. Our Furry Companions

Over the past ten years, the pet industry in China has seen a 2,000% growth rate that is only accelerating. Chinese pet owners are increasingly treating their furry companions as beloved family members or children and are more willing to spend on them. The younger generations in China are moving away from the traditional family unit, many preferring to live alone and looking to pets to fulfil their emotional needs.

As a result, all categories within the pet market are seeing surges, from pet food and pet toys to pet tech devices and clothing. The entire pet industry is expected to reach US$113.9 billion in 2025. With over 76% of pet owners in China under the age of 30, online purchase channels are at the forefront of the pet market.

Healthy, premium, and natural pet foods and treats are hugely popular among pet owners, who are mostly young, highly educated consumers living in higher tier cities. These consumers are not only interested in their own health but also the health of their animal companions.

Other trends include pet tech devices such as automated feeders, smart cameras, or smart litter boxes, many of which can connect to Wi-Fi and be controlled by apps on mobile devices.

5. Adventure & The Outdoors

Another trend that has seen a surge over the past year is a fascination with the outdoors. From skiing to camping, Chinese consumers are more willing than ever to try out new hobbies and activities, especially after the end of COVID-19 restrictions.

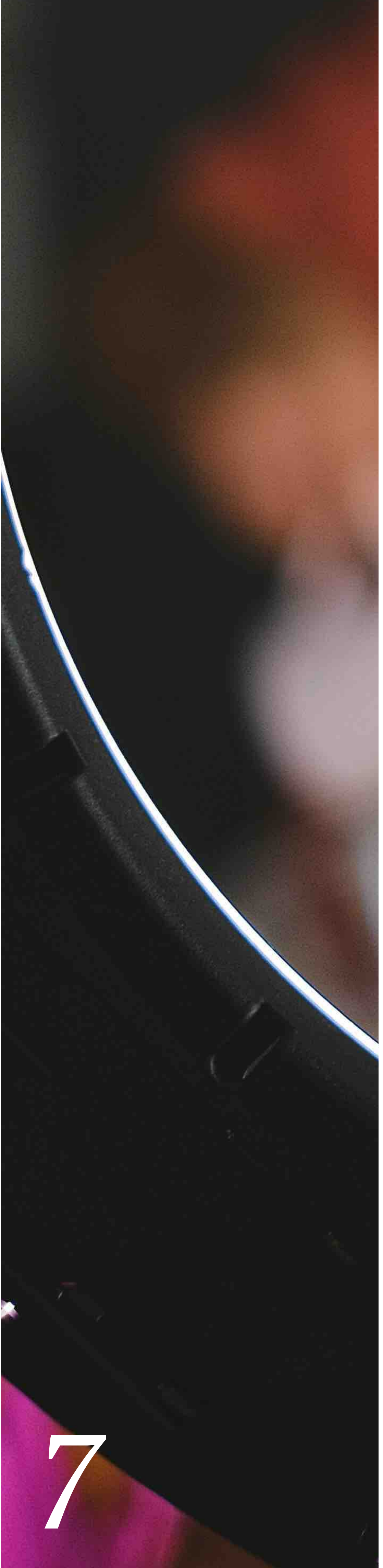
The Winter Olympics in Beijing helped to drive interest in winter sports, leading to a growth in sales of winter sports equipment among Chinese consumers. Moreover, the popularity of Team China's Eileen Gu, who won the gold medal in the Freeski Big Air event during the Winter Olympics, has also added to the excitement and hype around winter sports. Many of these new enthusiasts are first-time skiers and require an entirely new set of clothes and gear, making China a budding and still not fully tapped market for brands within this category.

Aside from winter sports, Chinese consumers are also showing greater interest in hiking and camping as summertime activities, which is a market that is expected to increase to above $100 billion by 2025.

As we continue into 2023, brands need to be aware of the changes happening and the shift toward a digital lifestyle. More than ever, Chinese consumers are living a significant portion of their lives online, even as they continue to expand their interests offline. Brands who want to engage and connect with potential customers in China must understand their positioning in the market and have a grasp on both Chinese consumer offline behaviour and how to reach them online.

Douyin

Poised to Take Over E-commerce in China



Douyin: Poised to Take Over E-commerce in China

By Sandra Weiss, RedFern Digital

As the largest E-commerce market in the world when it comes to sales, China accounted for roughly 45% of all retail sales online in 2022 and is estimated to reach a market value of $3.3 trillion by 2025. Therefore, when a disrupter to the established E-commerce giants in China, Alibaba and JD, comes along, it is important to take notice.

In the past few years, the social commerce platform Douyin has been making waves as it establishes itself as a leader in E-commerce livestreaming and short video. Although the platform's challenges to traditional E-commerce in China already began when it allowed brands to open domestic Douyin Stores directly on the app, competition was further emphasized through the launch of Douyin Mall. Douyin Mall can be accessed directly on the platform, and with an interface similar to Tmall, allows users to directly search for products. In contrast, Alibaba has increasingly focused on content and engagement for its platforms, such as Tmall and Taobao, to further drive traffic and purchases.

Moreover, Douyin recently moved from invitation only to allowing all brands to apply for selling products directly on the platform through cross-border E-commerce. The impact of this move is massive, as it presents a huge opportunity for foreign brands and a further point of competition with JD and Alibaba. Brands can now sell directly on Douyin without setting up a domestic entity or establishing a business license within mainland China. Foreign brands can take advantage of Douyin's massive social influence, and link products directly in short videos and livestreams, decreasing the loss of traffic when driving customers to make purchases, as they no longer need to leave the platform to do so.

To take advantage of these new cross-border allowances, the brand must have a registered company entity overseas or in Hong Kong, Macau, or Taiwan, and have overseas retail or trade qualifications. Moreover, the brand must also have a domestic agent who can accept joint liability within mainland China, along with a corporate bank account located overseas or in Hong Kong, Macao, and Taiwan.

Over the past year, Douyin's efforts have led to significant growth in sales on the platform, with the following YOY growth stats from 2022:

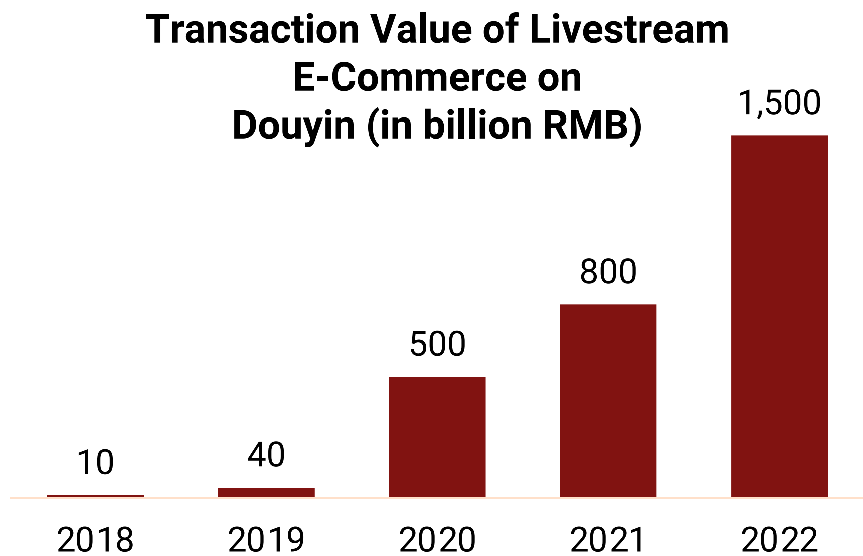
161%
YOY Growth in GMV from Short Video

124%
YOY Growth in GMV from Livestreams

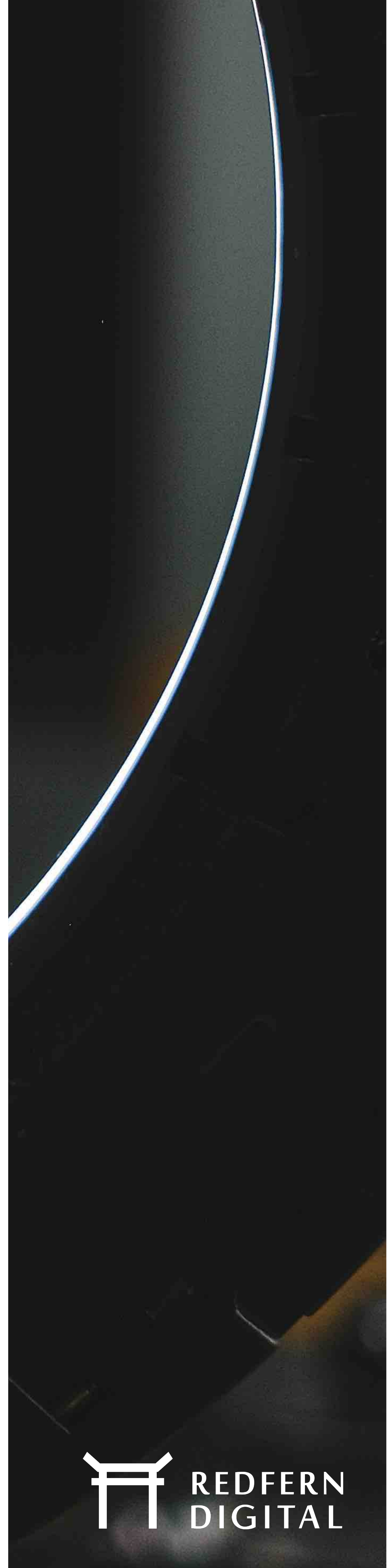
434%
YOY Growth in GMV from Douyin Mall

428%
YOY Growth in GMV from Douyin Stores

Source: ebrun, "2022 Douyin E-commerce Development Report"



Source: Statista, in cooperation with 100ec.cn, March 2023



Why does it matter?

In China, livestreaming and short video are the content formats of the future. More than ever, Chinese consumers are preferring more visual methods of both entertainment and shopping, as they follow livestreamers' suggestions on products to purchase. Douyin was already a top player in this category, reaching a GMV from livestreaming of $1.5 trillion in 2022, and the allowance of cross-border e-commerce will further strengthen the platform's growth.

By enabling the direct purchase of imported cross-border products on the platform, Douyin is reducing the barriers to purchase. This helps brands boost sales, especially from 'impulse purchases' during both internal livestreams conducted by the brand, and broadcasts of massively popular livestreamers who are promoting the product, exemplifying social commerce. In fact, brand-run livestreams are becoming increasingly popular and gaining larger shares in the sales distribution on Douyin. Over 50% of sales on Douyin among the top 500 brands on the platform came from brand-run livestreams in February of 2022, and in 2023, the market share of brand livestreaming is estimated to exceed 50%.

In contrast to Douyin's massive surges in growth, despite still being ahead in the E-commerce market, Alibaba and JD are seeing decelerated growth. However, they still have the advantage when it comes to intentional purchases. Chinese consumers will go on E-commerce platforms with the intention of making a purchase, increasing platform conversion rates. On the other hand, Douyin remains an entertainment hub at its core, offering E-commerce as a side feature that drives more impulsive purchase decisions.

It's important to note that when it comes to trust in the products purchased, customers are purchasing on Douyin because they trust the livestreamers. These customers do not have an inherent trust in the Douyin platform itself, which is what platforms such as Tmall and JD have spent the last decade building.

Brands need to understand the ever-shifting E-commerce and social commerce landscape in China to navigate it successfully. Although Alibaba and JD remain the two pillars in China's E-commerce landscape, Douyin was already a significant touchpoint for brand discovery among Chinese consumers. Therefore, Douyin's move to allow all brands to sell through CBEC on the platform will make it an increasingly appealing sales channel for foreign brands as it accelerates customers through their purchase journey.

A Sweet Tooth for China:

The Chinese Confectionery Market

A Sweet Tooth for China: The Chinese Confectionery Market

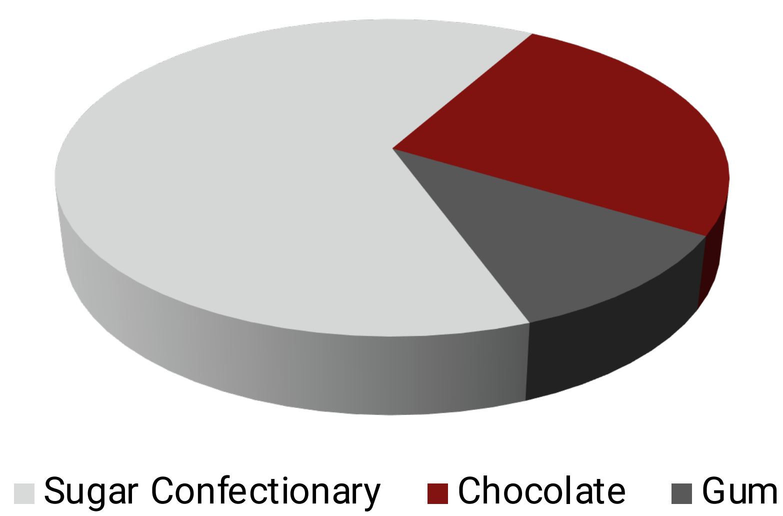
By Sandra Weiss, RedFern Digital

China's appetite when it comes to food and beverage products is larger than ever, and the confectionery market is no different. Increased disposable income, greater exposure to Western cuisines, and more variety of choices in confectionery products have boosted both interest and consumption among Chinese consumers.

The confectionery market size was estimated at CNY126.2 billion in 2022 and is expected to continue growing at a CAGR of over 2% from 2021 to 2026. Segments within the confectionery market include chocolate and chocolate products, sugar confectionery such as sweets, ice cream, preserved pastry goods and cakes, and gum. When it comes to distribution channels, although E-commerce channels are on the rise, hypermarkets & supermarkets are still the major source through which customers purchase confectionery products in China.

However, China is still far behind Europe when it comes to the confectionery market, consuming 70g per capita in 2021, compared to 7kg per capita in Europe and 2kg per capita in Japan and South Korea. One reason for this is the differing customs.

Market Share of Sub-Categories within the China Confectionery Market



Source: GlobalData, "China Confectionery Market Analysis", September 2022

As an example, chocolate is not traditionally consumed as a snack or treat on its own. Instead, it is used as an ingredient in baked goods or ice cream, such as chocolate filling for steam buns, chocolate flavoured ice cream, or chocolate cookies.

In general, the main consumer groups of confectionery products are Millennials and Gen-Z, who have more of a sweet tooth compared to the older generations. Part of this is because of increased exposure to Western style confectionery products and more international taste preferences.

Competition within the confectionery sector is fierce, with a wide number of both foreign and local brands. Foreign brands tend to target the higher-end markets and higher tier cities, emphasizing quality and the premium nature of their products, whereas competition among domestic brands tends to be price focused and focused on the lower end of the market. When it comes to the chocolate market, foreign brands take up 70% of the market share, with the big players including Mars, Ferrero, Mondelez, and Nestlé.

Even as the confectionery market grows, brands within this sector need to face the challenges that come with an increasingly health focused population in China. Although they have a higher preference for confectionery products, the younger generation are also more focused on eating healthy, so will look for products that have low sugar, low fat, low calories, or are high in protein.

To overcome this challenge, some brands have shifted towards developing functional snacking products that incorporate functional ingredients or nutrients, such as vitamins, probiotics, prebiotics, or collagen. Other brands choose to focus on unique selling points that will allow their products to stand out from competitors, such as novel flavours, product origins, raw materials, or aesthetically unique packaging.

Moreover, brands need to strive to build a strong identity that emotionally connects with Chinese consumers. The confectionery market must not only appeal to consumers' taste buds but also address their emotional needs. Beyond snacking, confectionery products are often used as a way of expressing emotions, with consumers gifting sweets and chocolate to indicate affection or love.

Localizing to China

To appeal to the younger generations and gain their attention, brands need to localize to China. One method is to collaborate with local bakeries or tea chains to create unique drinks that incorporate confectionery brands. Doing so will both boost awareness and attention for the brand, while also appealing to local food and beverage preferences. The Chinese brand, Milk Dog, is an example of this, developing a premium milk drink that uses chocolate from Barry Callebaut.

White Rabbit is a popular milk-based Chinese candy brand that has been in China for over 60 years and is nostalgic to many Chinese consumers. In order to stay relevant and novel, co-branding is central to the brand's marketing strategy.

Over the past couple of years, White Rabbit has conducted several high-profile collaborations with brands across a wide range of categories.

- In 2022, a collaboration between White Rabbit and Chinese cosmetics brand, Maxam, led to the release of a milk candy flavoured lip balm that was sold out within seconds of launch.
- Towards the end of 2022, White Rabbit collaborated with fashion brand Coach to launch a collection that includes apparel, footwear, and accessories.
- To celebrate the Year of the Rabbit, Japanese cosmetics brand SK-II collaborated with White Rabbit to launch a special edition of the PITERA Facial Treatment Essence. The product packaging prominently shows White Brand's brand image and motif.
- Other brand collaborations that White Rabbit has conducted over the years include with chocolate brand Godiva, perfume brand Scent Library, fashion brand LEDIN, beverage chain Happy Lemon, etc.

These collaborations have allowed White Rabbit to continue holding the attention of Chinese consumers and appealing to a new generation of potential customers, whilst also reaching a wider audience due to the different types of brands collaborated with.

However, it must be noted that while these examples show the power of brand collaborations, White Rabbit relies heavily on building nostalgia into its marketing. New and foreign brands entering the China market must look for brand collaborations that are more in line with their own brand positioning and market strategy, emphasizing their unique brand identity.

2023: The State of Influencer Marketing in Vietnam

REDFERN DIGITAL

2023: The State of Influencer Marketing in Vietnam

By Vietnam Team, RedFern Digital

Influencer or Key Opinion Leader (KOLs) marketing has become an increasingly important method through which brands can work with influencers on social media to promote their product and reach their customers. Vietnam is no exception. The country had over 77 million active social media users in 2022, who spent an average of 2 hours and 28 minutes using social media every day. Working with local influencers who can tap into that attention economy is a lucrative method for brands to expand their reach and engage with their target audience.

In fact, over 77% of Vietnamese users have purchased a product because of influencer recommendations or endorsements, indicating the trust that Vietnamese consumers have in local influencers.

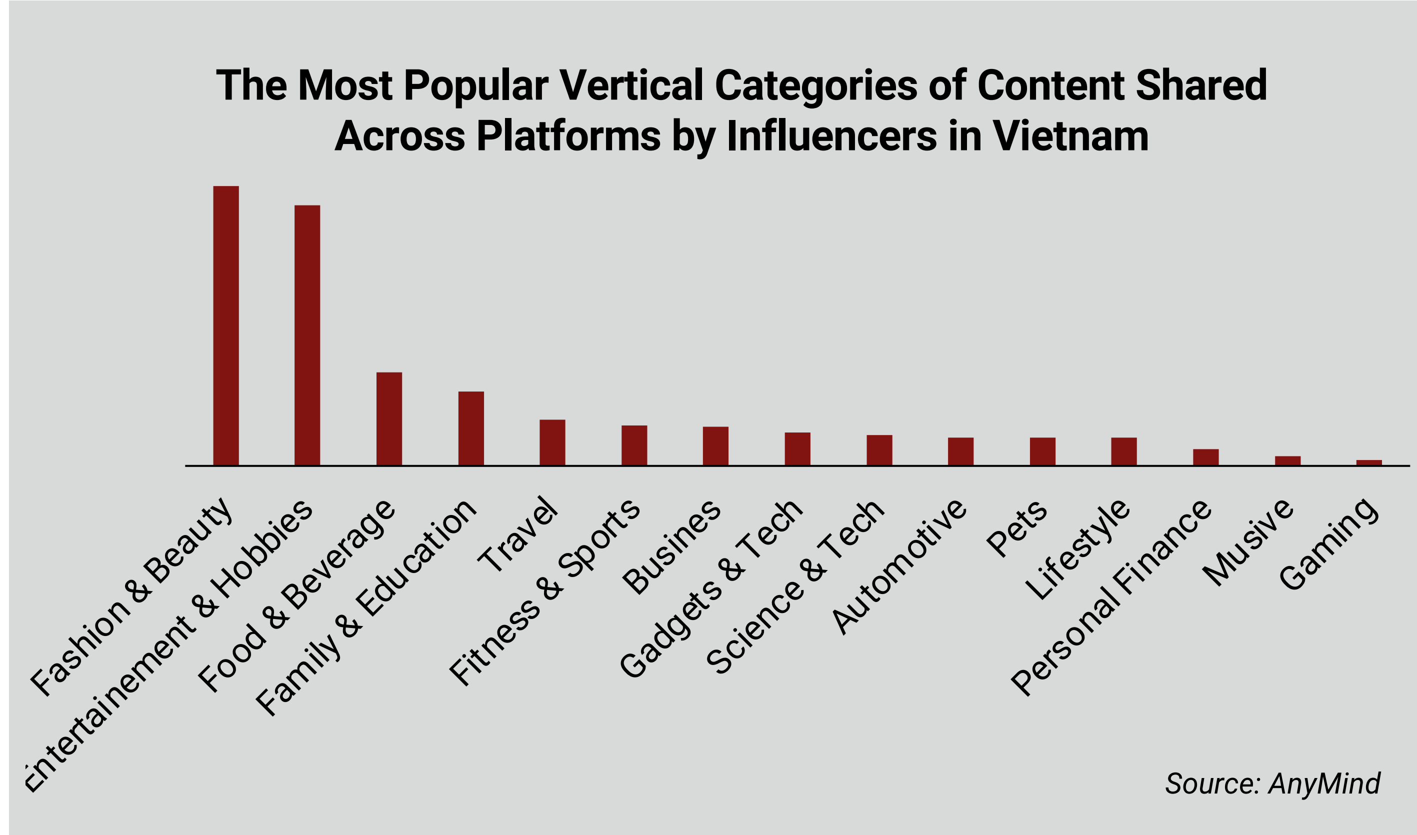
It is increasingly becoming common for brands to invest over 30% of their marketing budget on influencer marketing, especially as product discovery oftentimes occurs through influencer reviews, unboxing videos, or product tutorials. The ad spending on influencer advertising in Vietnam is projected to reach USD75.29m in 2023 and USD123.10m by 2027, at an annual growth rate (CAGR 2023-2027) of 13.08%.

The most popular content types that Vietnamese influencers share include Fashion & Beauty, Entertainment & Hobbies, and Food & Beverage. However, influencers are not limited to only one of these verticals, and in recent years, more have begun to branch out into several different types of content categories.

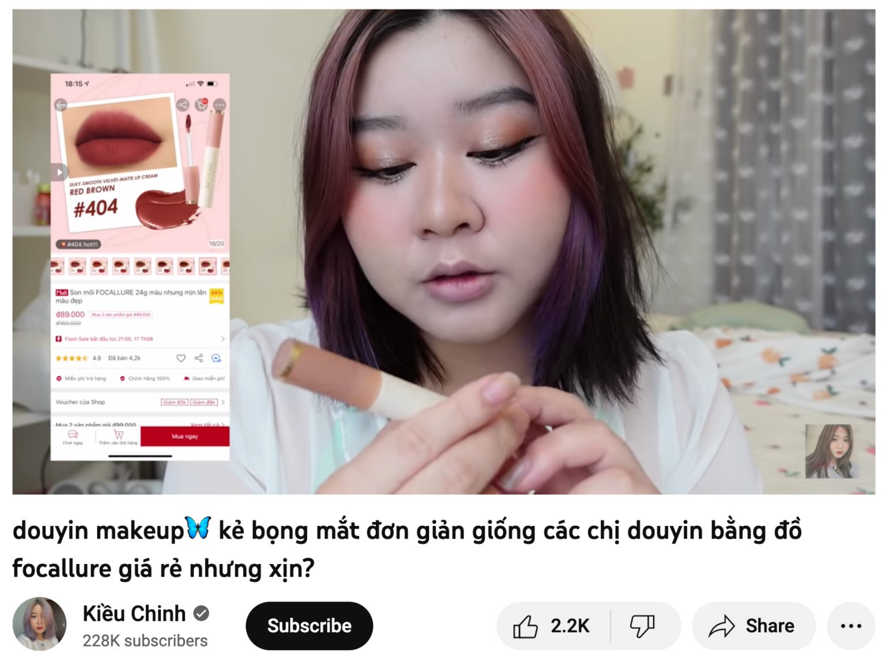
Example of Successful Influencer Campaign in Vietnam: FOCALLURE

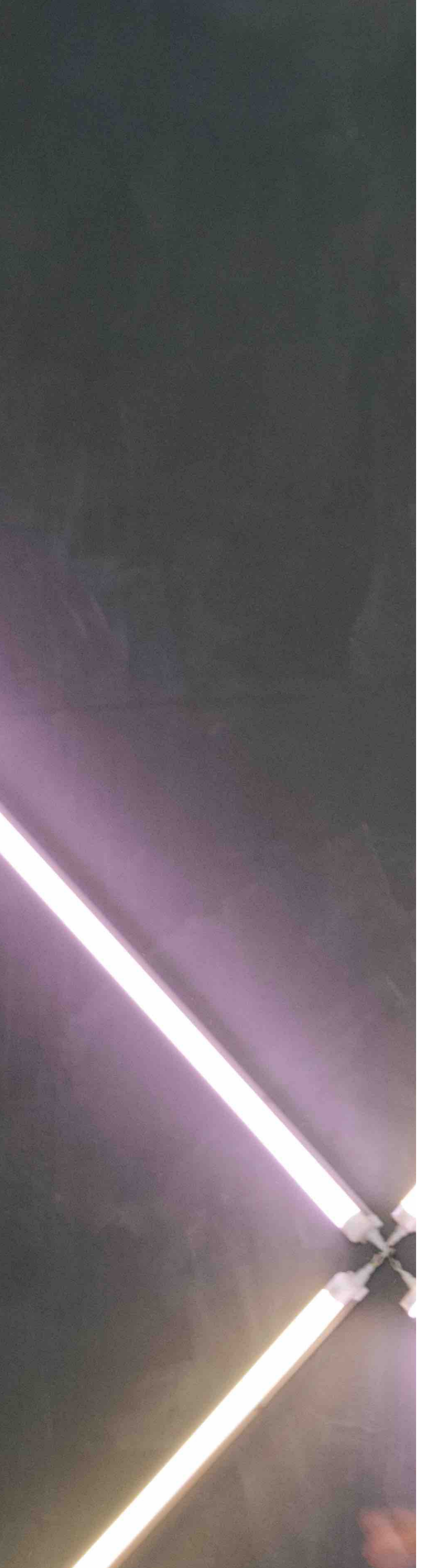
Focallure is a beauty brand from China that has successfully leveraged influencer marketing into widespread success in Vietnam. The main challenge that the brand faced was to localize its products to Vietnam and increase brand awareness within the competitive beauty industry.

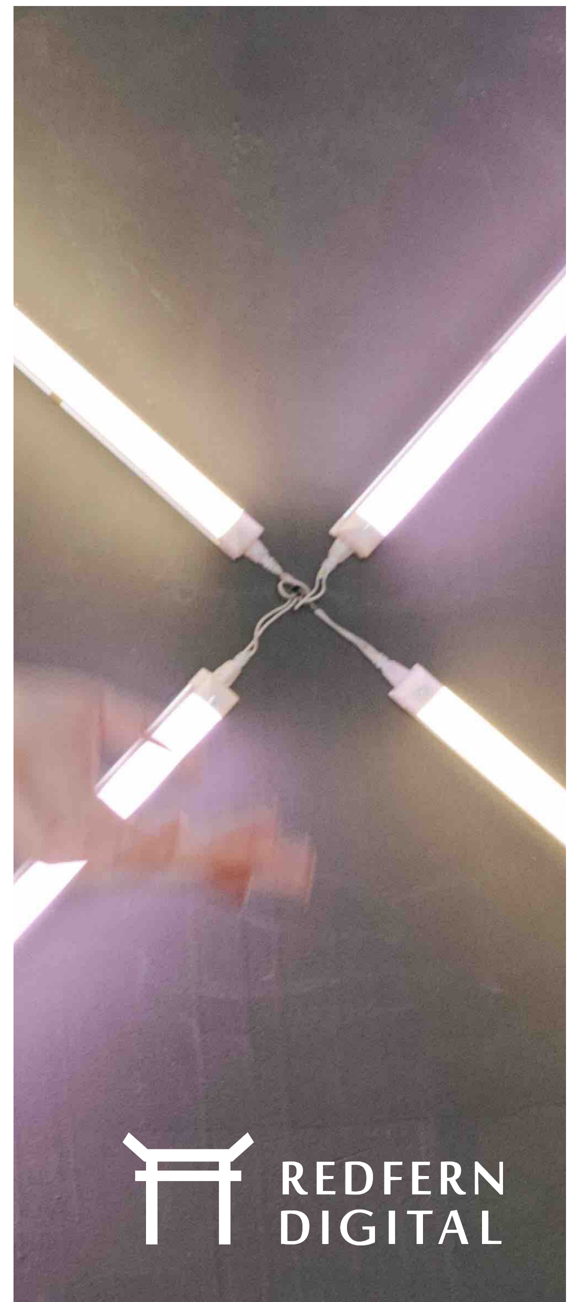
To address this, Focallure ran an influencer campaign in 2021 across Facebook, YouTube, Instagram, and TikTok, aiming to promote their new product line to a target audience of millennials and Gen Z consumers who are interested in beauty and beauty products.



On YouTube, Focallure sent products to 12 beauty influencers, who filmed product reviews and tutorials using Focallure's new products. During these videos, the influencers discussed the product price, quality, and characteristics, while showing their viewers how the products can be used. Through their efforts, the brand's YouTube campaign gained over 700,000 views, with an engagement rate of 8-10%, most of which were positive comments about the brand and products.

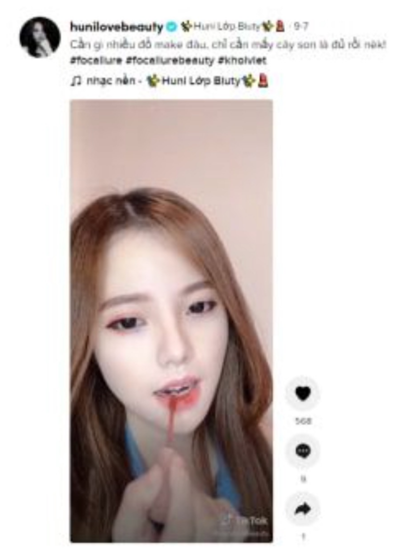






Focallure also worked with 20 Facebook influencers to produce product reviews that included multiple photos or short clips of the influencers using the products. The influencers used the hashtags #Focallure and #Focallurereview to tie the posts back to the campaign, with many receiving over 2,000-3,000 interactions on their posts.

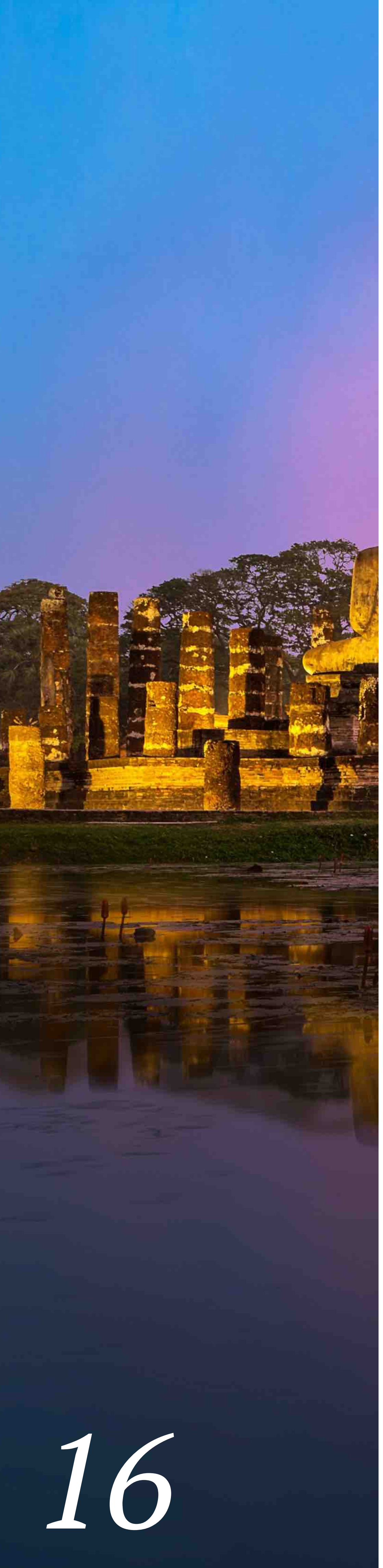
On Instagram and TikTok, the format favoured for this style of campaign is short-video, including unboxings, reviews, tutorials, and make-up transformations that show "Before" and "After" photos of the influencers. Focallure also worked with smaller influencers to increase word-of-mouth marketing. The views on these videos reached over 70k-300k per video, with likes reaching up to over 40% of total views.



In terms of sales, the campaign increased revenue in Vietnam by 25%, and the rate of new orders by 17%.

As can be seen, when implemented correctly through careful selection of influencers that have high engagement rates and content style and type that is appropriate for the brand, influencer marketing campaigns can lead to massive increases in brand awareness and sales in Vietnam.

Successfully Localising Brands for the Asian Market



Successfully Localising a Brand for the Asian Market

By Ryan Molloy, RedFern Digital

The proof is in the pudding. Direct experience within the specific market, specific category, and within the last few months can provide an agency or brand the merit to be able to take on the challenge.

Localization across Asia is a constantly moving target, wherein brands will need to repeatedly adjust their approach, vision, or strategy every three months. Brands in Vietnam, Thailand and China will update their brand plans on a quarterly basis, never holding to a single slogan and constantly updating their voice and image to fit with the current trends.

Asia is dominated by word-of-mouth cultures where consumers will only introduce brands and products to their family, friends, and associates if the products can add value or are "unique" compared to other offerings seen in supermarkets. If the brand is not able to offer these elements, then it needs to localise in a way that either:

1. Establishes the brand as more premium
2. Fulfils an emotional need of the consumers that other brands have failed to

Brands need to be malleable. Brands need to be able to retain their company DNA at all times and ensure consistency, while still relaxing global guidelines to an extent that allows for test and learn strategies that can be adapted and optimized. Asian brands tend to be much bolder and more dynamic in their brand identity. However, brand appearances and voices are ever-changing to fit with the current trends and consumer behaviours.

Brands also need to be aware of the vast amount of content that is required across Asian markets (in particular China). Localising a brand cannot be a rigid process as it needs to extend to any content produced and campaigns developed for a specific market, including videos, text, images, connotations, and other content formats as well.

With that said, instead of focusing on who they are, brands should focus on doing something unique. Asian consumers are impressed by novelty and will pay more attention to ingenious brand developments rather than on-brand developments.

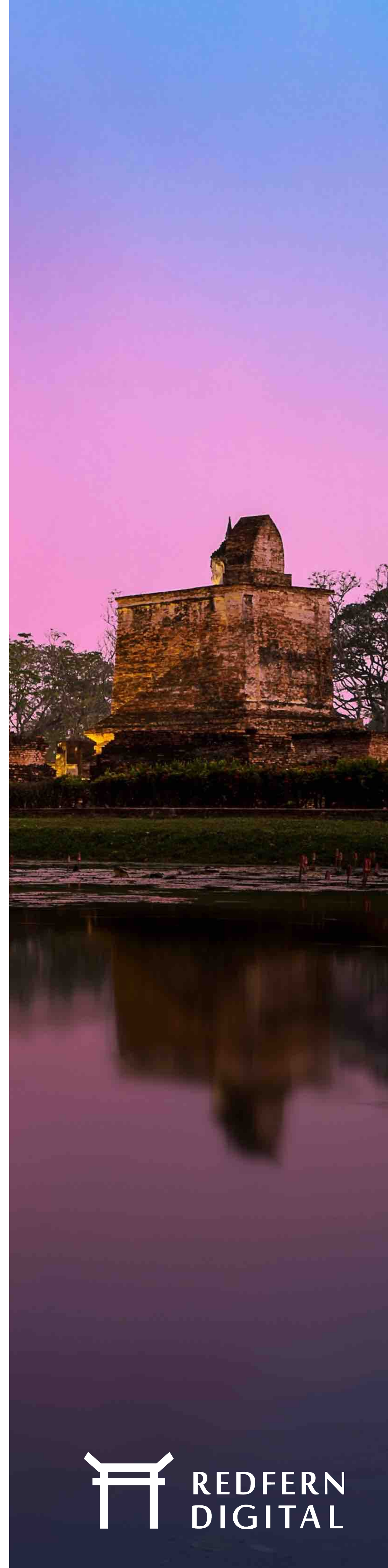
Brands should strive to be understanding, but never patronizing or culturally insensitive. In November 2018, Dolce & Gabbana was involved in a debacle in China after releasing a series of controversial and culturally tone-deaf ads. The condemnation that D&B faced was widespread and immediate, leading to a heavily stained reputation that is still haunting the brand four years later. Even today, Chinese celebrities seen wearing D&B will still receive a deluge of negative comments from Chinese consumers.

The entire scandal points to the consistent theme of a lack of understanding between HQ and regional offices. HQ pushes the brand into trying too hard without listening to regional voices, causing the brand to become culturally insensitive or to stereotype consumers. Brands need to take into account local market traditions and customs by considering the input and suggestions of local teams, while still remembering that we are in the age of the global consumer.

Brands should be adventurous in their localization but not lose sight of their home DNA. Although localization is essential to connecting with local customers, both under-localisation and over-localization present their own issues.

Brands that choose to change too much when entering a new market will run the risk of rendering themselves unrecognisable, becoming a new brand fighting in a new market with no ties to the initial roots. When global brands enter Asia, under localisation or localising through top-down branding and translation of corporate sayings may lead to a lack of authenticity. Customers can see through brands that are not showing real effort in understanding traditions and cultures. If brands lack authenticity, then nobody will buy into them. It is important that brands ensure they are speaking with people, not speaking at them.

Why do brands need to localize in Asia? **To find a purpose, stay human-centric, and be approachable.**



RedFern Digital is an award-winning independent brand management agency that develops, manages, and distributes brands across Asia. RedFern Digital is responsible for the strategic direction, growth, and performance of some of the largest and most successful brands across a dynamic range of categories in the market.

We don't help brands; we make them have **IMPACT**. Having impact means beating the market and your competitors at everything you do. Our insights, experience and kick-ass team mean that your brand is not only in safe hands but is about to thrive.

Our teams specializes in

- Digital Marketing & Strategy
- Content Marketing & Paid Media
- Consumer Research & Data
- Creative Design, Branding & Production
- Ecommerce
- Technical Development & Integration

Contact us to learn more about what we can do for you.

Making Brands Have *IMPACT.*

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