

A decorative graphic featuring a pink chair on the right side and a shower of orange and yellow confetti falling from the top left corner.

Disruptive Communication

Measurement, evaluation and
insights in the Age of Change

amec Global Summit on Measurement

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KANTAR MEDIA CIC



WHAT CAN SOCIAL MEDIA IN CHINA TEACH THE WORLD?

DR. LINDA XU – CHIEF CLIENT OFFICER
KANTAR MEDIA CIC



Why social media in China is so different

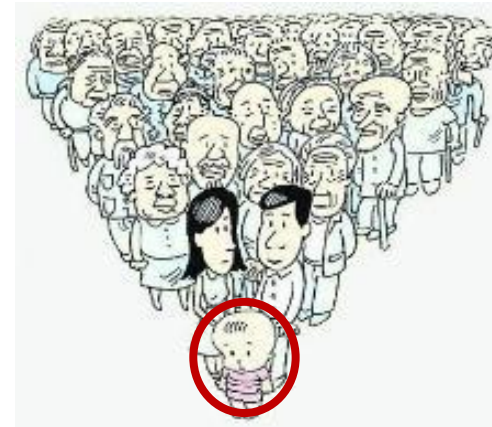
The Chinese Internet serves as a powerful platform for entertainment, information, socializing, and purchasing



Limited Variety of
Entertainment



Media Not Trusted



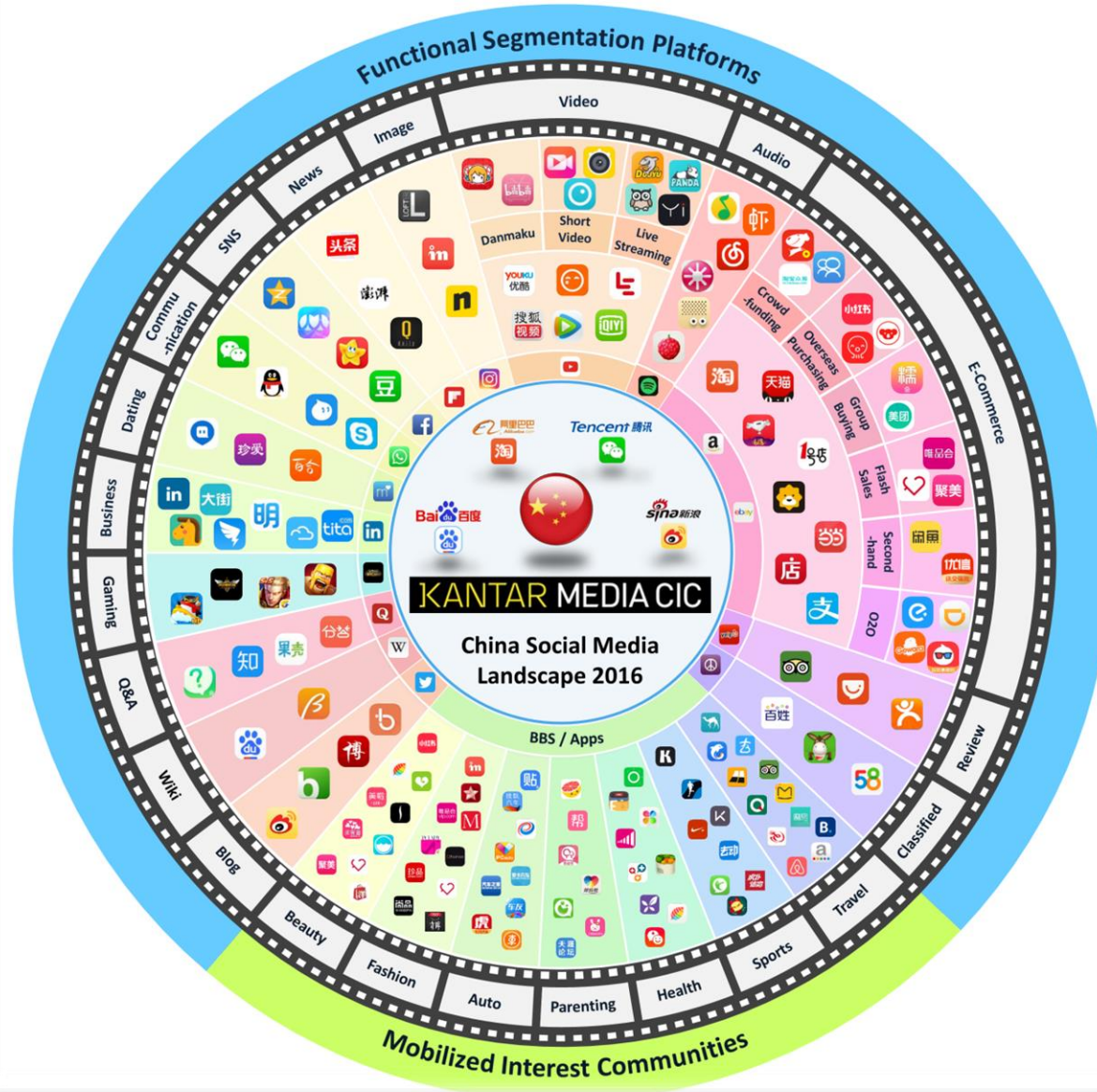
Limited Socializing



Unbalanced Shopping
Access

Social Media in China is:

Unique, Fragmented, and Dynamic



2008



2010



2011



2012



2013



2014



2015



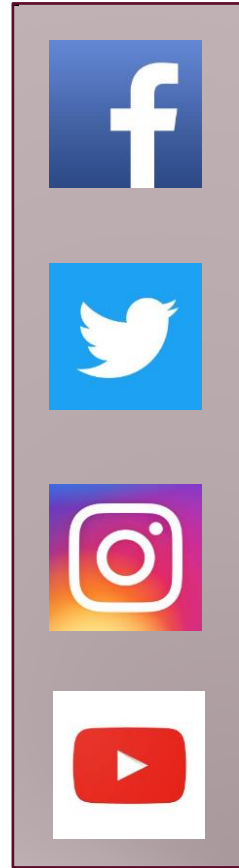
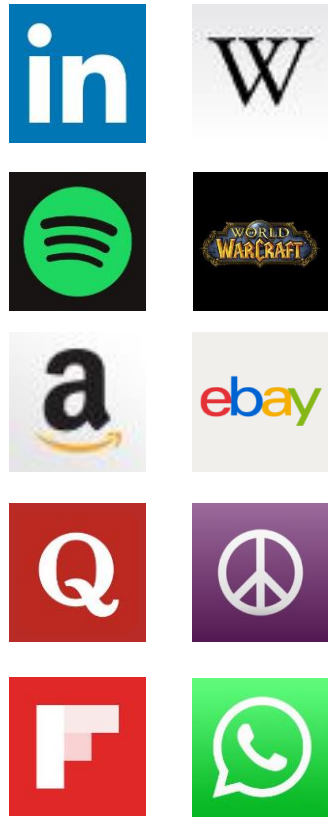
BATS make China's landscape uniquely PRACTICAL



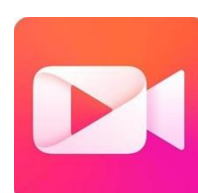
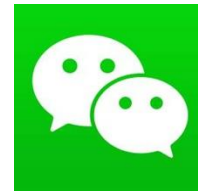
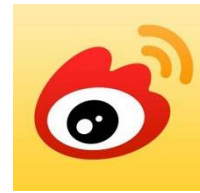
BATS: Baidu, Alibaba (Tmall/Alipay), Tencent (Wechat/QQ), Sina (Weibo)

Firewall has driven localization and much more

✓ ACCESSABLE



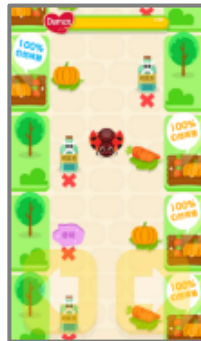
X Blocked



WeChat public accounts functions are innovative and comprehensive



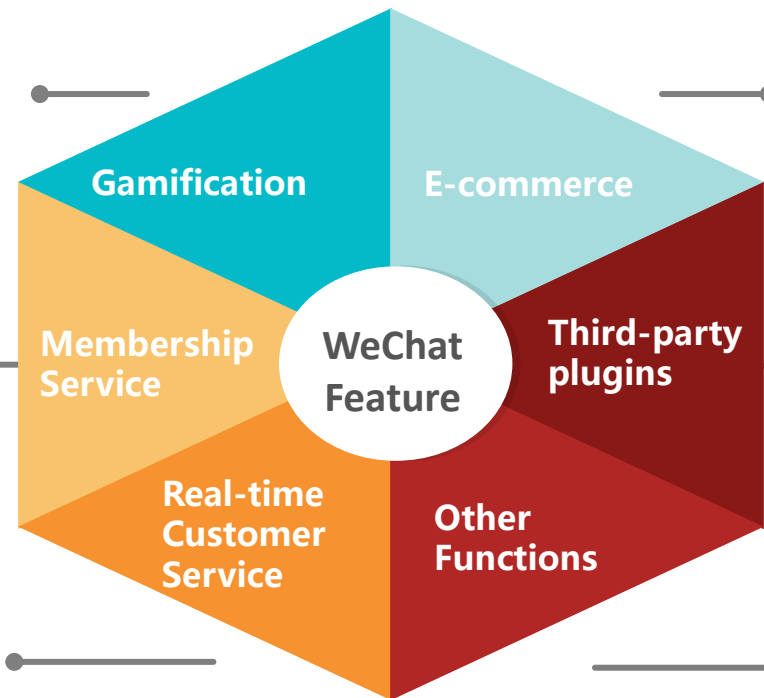
Gamification drives netizens participation to better deliver brand/product feature



Discounts, credit and other membership services can be utilized on WeChat to enhance consumer loyalty



Real-time customer services to answer followers' questions/complaints



Brands can feed group-buying and discount content to consumers, and insert **e-commerce** site within banner



Forum



FM



Magazine



Third-party plugins make more functions possible on WeChat

Scan bar code to get **product** stock information



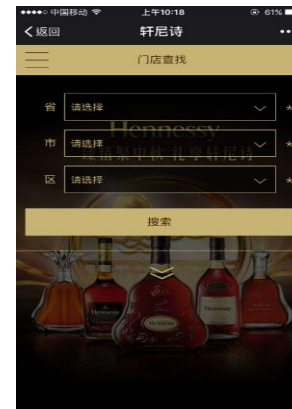
Brands enjoy new ways to connect with customers



Membership Service



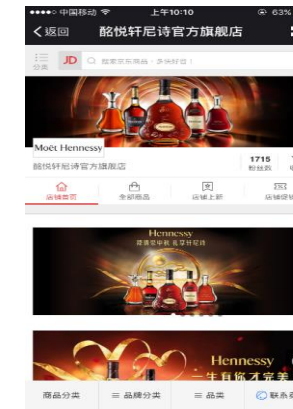
Product Sampling



Store Search



Customer Service



E-commerce



Survey



Brand Community



Product Information

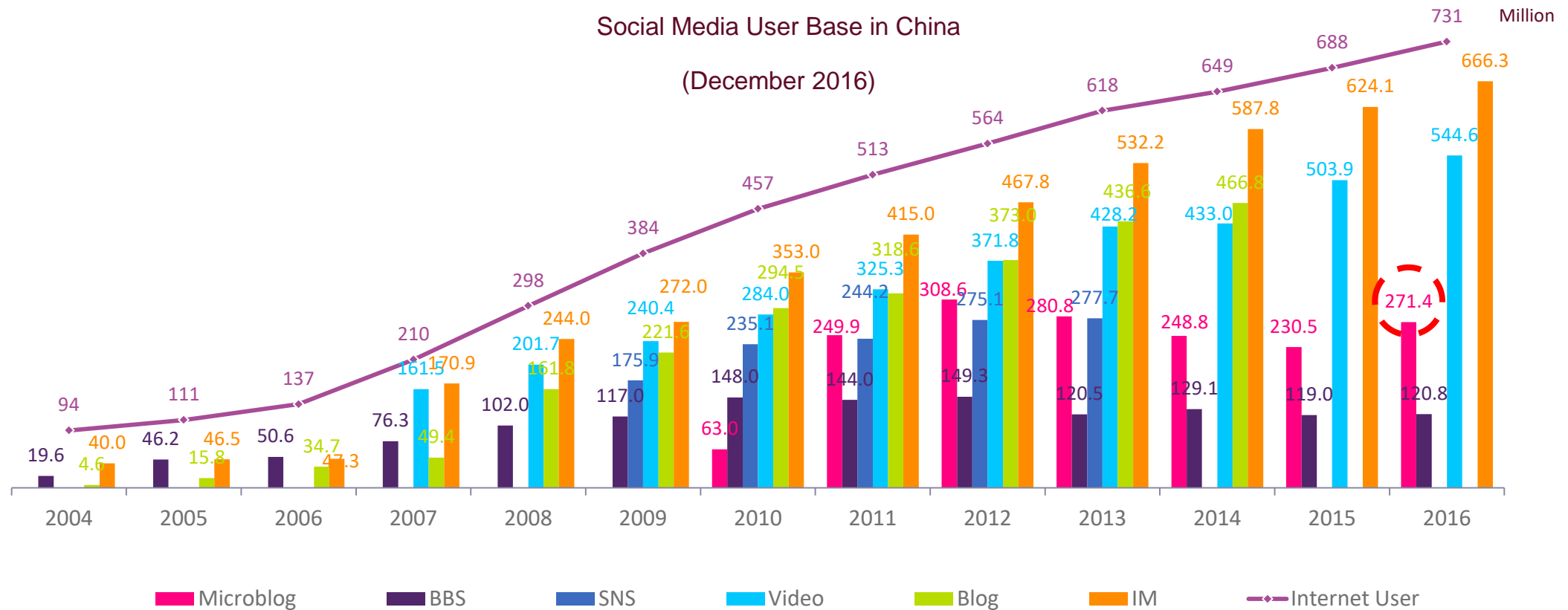


Campaign Channel
(Post and HTML5)



Influence of social platform in China

Social media user base steadily grows in China



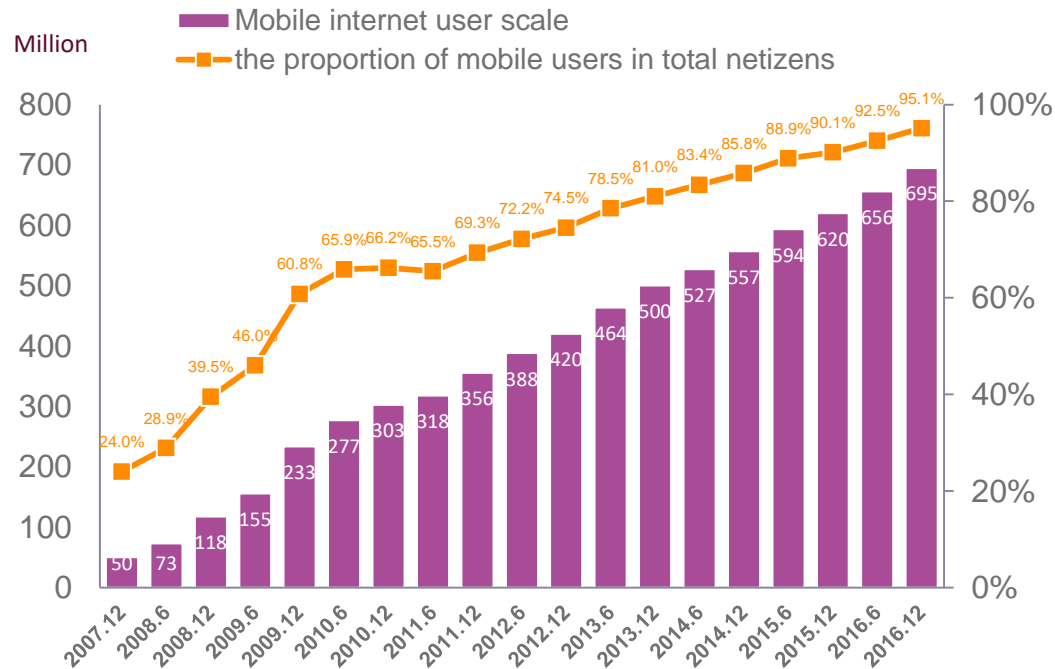
Source: The 39th Statistical Survey Report on the Internet Development in China by CNNIC, January 2017

Notes: Internet user number includes mobile internet number; WeChat user was included into mobile IM user. According to Tencent Financial Report, Q3, 2016, WeChat user reached 846 million by the end of September, 2016.

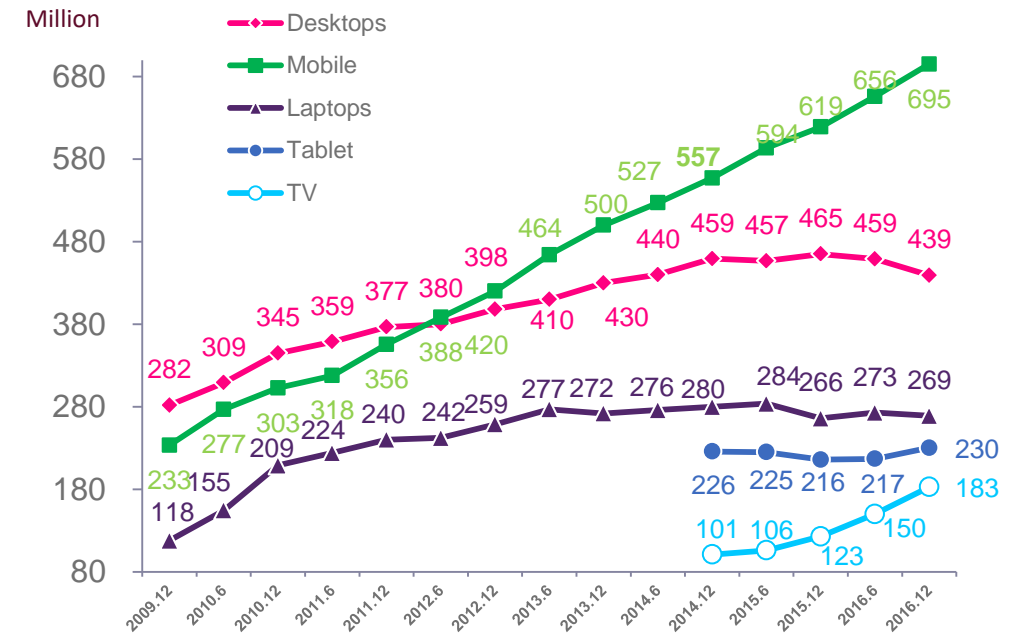
Notes: SNS user number isn't counted from December 2014; blog user number isn't counted from December 2015.

Mobile is the most widely used device to access the Internet

Mobile Internet Users in China



Internet Accessing Facilities

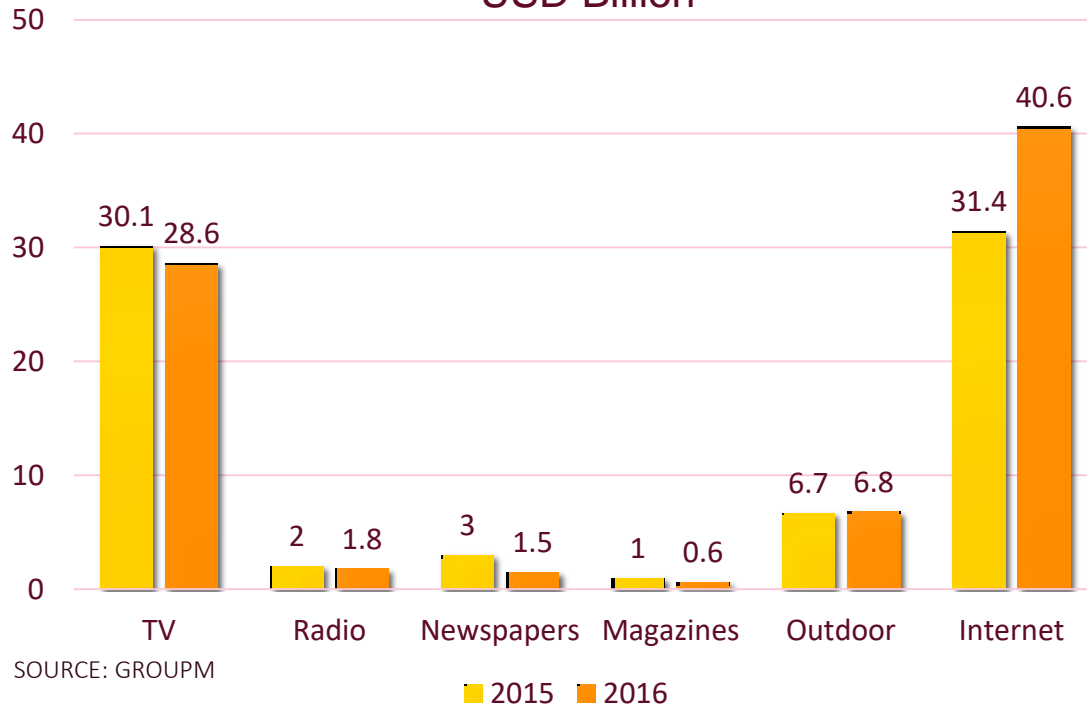


Source: The 39th Statistical Survey Report on the Internet Development in China by CNNIC, January 2017

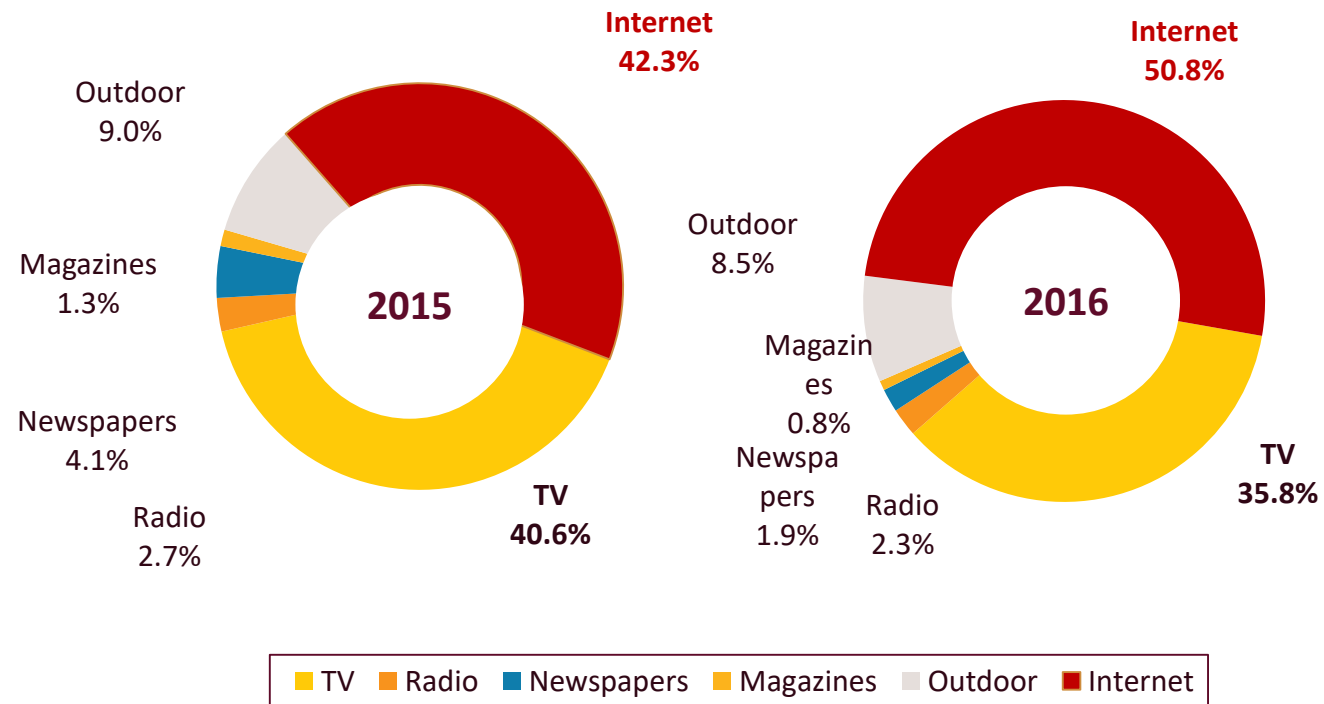
Note: Since 2014.12, TV has been used as an Internet Accessing Facility

Internet has become the leading media channel for ad spending in China

Advertising Spending by Media
USD Billion



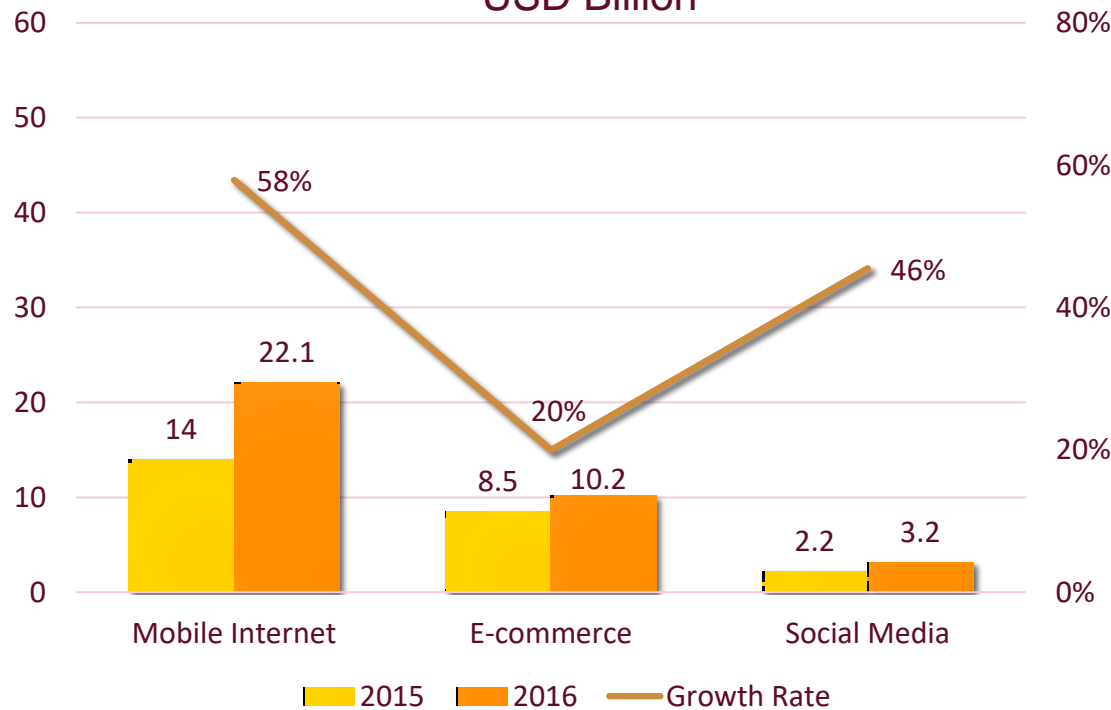
Share of Spending by Media



Note: The Internet category includes Mobile Internet, E-commerce, Search, Online Video and Social Media.

Ad spending on Mobile Internet, E-commerce and Social Media grew with government support

Advertising Spending by Category
USD Billion



SOURCE: GROUPEM / eMarketer / iResearch

Note: Mobile Internet includes display and search. E-commerce includes Taobao, Tmall, JD, Qunar, etc., Search, Social Media includes blog, Baidu Tieba, Qzone, WeChat, Sina Weibo, etc.

Internet, Smartphone and E-commerce has growing penetration in China

新华网 新闻 新华网 > 信息化 > 正文

互联网下乡2.0

2015年04月13日 08:45:31 来源： 北京晨报

Xinhua:
Internet To Countryside 2.0

为4600亿的市场放手一搏！

到乡村去，不仅带上乡愁，还有下，“重塑乡村”不再只是文艺青年串镇的服务站，成了一门关乎未来的青睐，动力十足，他们把资源和新农的2.0版本将掀起一场怎样的“新农

新华新闻 新华家电 > 正文

传统手机营销夹缝中求生存 启动下乡之路

2013年02月18日 13:31:45
来源： 中国质量报

国内手机市场规模和爱施德这两家国内大型中。在运营商和电商的双重夹击下，传统手机渠道商转型迫在眉睫，把握时机，向乡镇市场拓展或成为其在夹缝中的生存之路。

Xinhua:
Traditional Mobile Service are Struggling and Goes to Rural Area for Survival

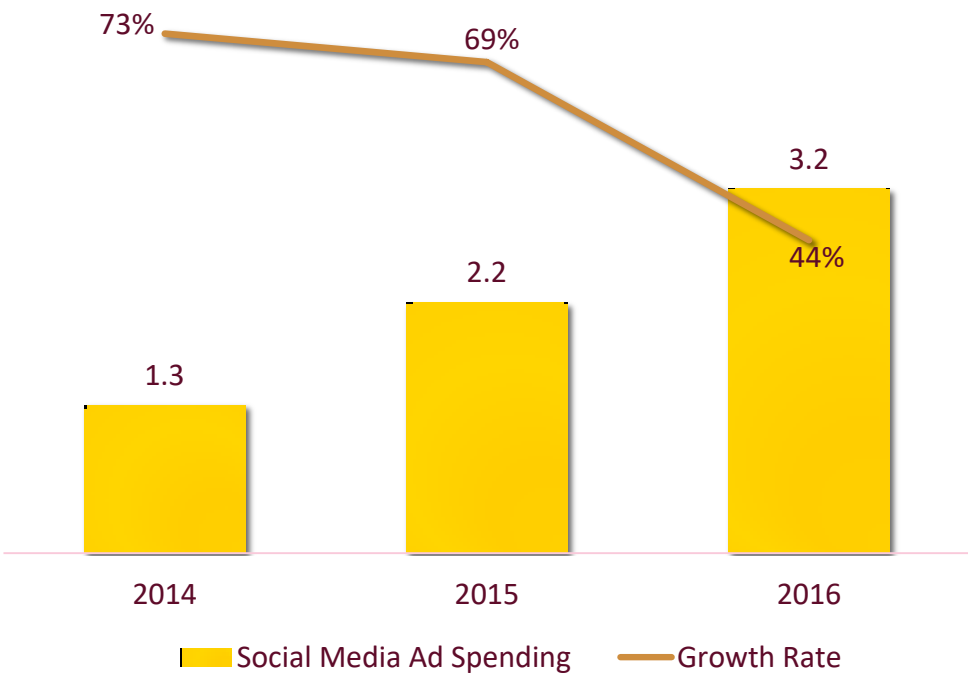
中国新闻网 首页 → 财经中心

People's Daily:
Further Release E-commerce Potential

人民日报：进一步释放电子商务发展潜力

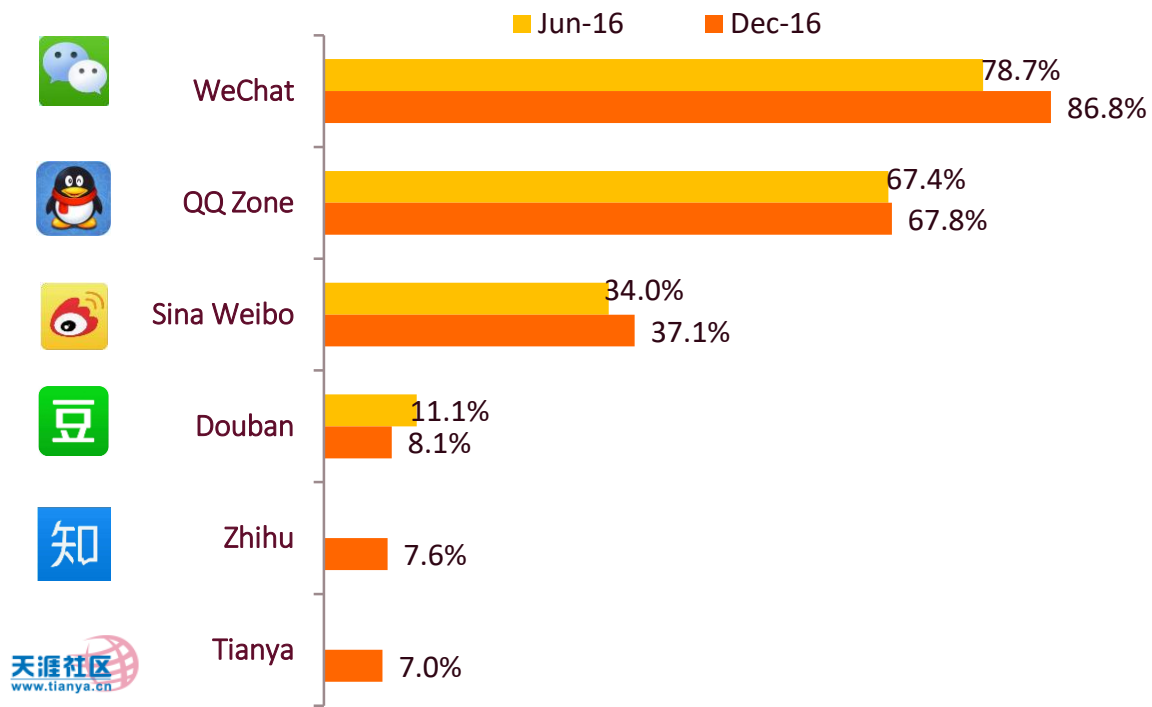
Skyrocketing Ad spending on social media in past few years

Social Media Advertising Spending
USD Billion



SOURCE: iResearch

Mobile App Penetration in China, 2016



SOURCE: CNNIC

Note: Mobile Internet includes display and search. E-commerce includes Taobao, Tmall, JD, Qunar, etc, Search, Social Media includes blog, Baidu Tieba, Qzone, WeChat, Sina Weibo, etc.



Impact of social campaigns in China

Trending Stories on Social Media in China



Celebrity & Fandom



Celebrity Endorsement



I.P. (Intellectual Property)



Brand Sponsorship



KOL & Cyber Star



New Economy



Flourishing E-commerce



Traffic Guidance

KOL: Key Opinion Leader

Hot I.P. + Celebrity + Platform Integration



@HERO趙又廷 12,170,884

Kiehl's Tmall Flagship Store Opening Warm-up: Celebrity post & Promotion video



Weibo Post

93,243 14,709
95,748 Link

Short Video

7,430,000 Viewership



天猫 Tmall.com

High Popularity



Hot I.P. Effect

5,000,000+



1 Month

10,000,000+

Live Broadcasting for launch campaign



Sales Volume
(April 6th, 2017)



24 Hours



1.5 M USD

Brand + Celebrity + E-commerce



@KobeBryant

4,964,815

- NBA Most Valuable Player
- 5 Times NBA Champions
- 18 Times All Star Player

Promotion of NBA #KB20# T-shirt

Weibo + Short Video + E-commerce



KobeBryant

2016-4-14 07:07 来自 秒拍网页版

It's been an honor to play for the Lakers for 20 years. Thank you for all the support. #KB20#

网页链接

秒拍视频



Link



登录NBA天猫官方旗舰店，了解更多KB20相关信息



67,643

Retweet



32,611

Comment



189,451

Like



E-commerce
Link
+
Short Video



One Day

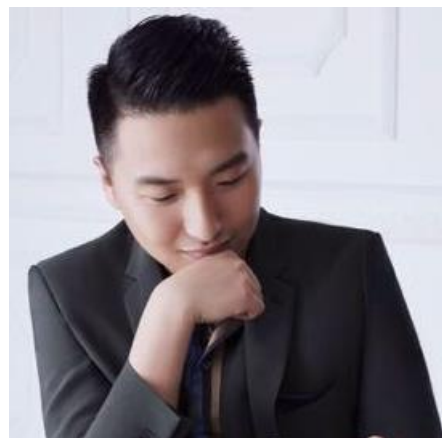


7,000 Orders



\$380,000

Expert KOL and luxury brand cooperation



Mr. Bag recommended Givenchy repeatedly



@Bags包先生
A fashion KOL
Loves bag



Fan base:
400,000+
Average reads:
100,000+

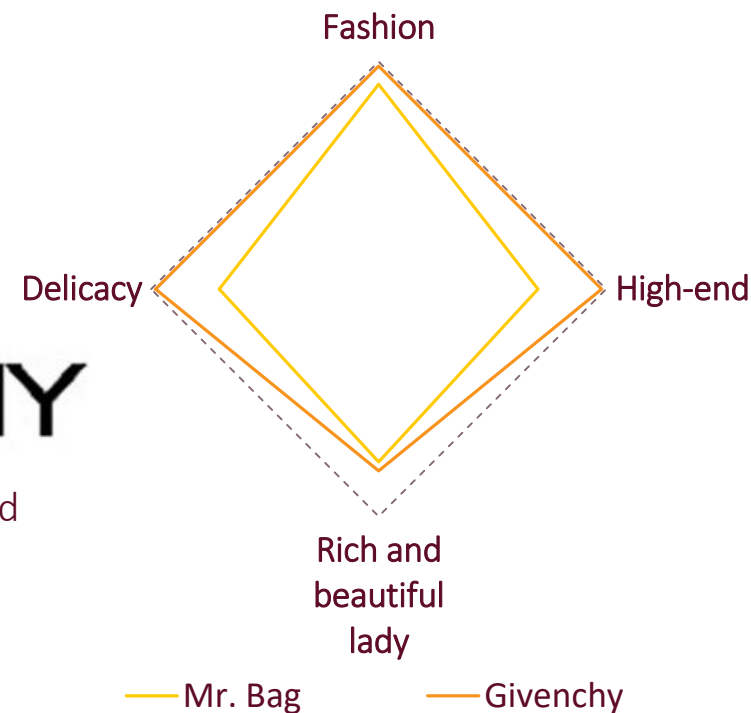


• Note: 1: Data source: Digitaling. 2: Data source: Kantar Media CIC.

Givenchy and Mr. bag fans image analysis



French Luxury Fashion Brand
Elegance, dignity, delicacy



Success with limited editions for loyal fans

Mr. Bag X Givenchy
Limited edition bag: Givenchy Horizon



The only purchase channel



80 Bags



12 Minutes



175,000 USD



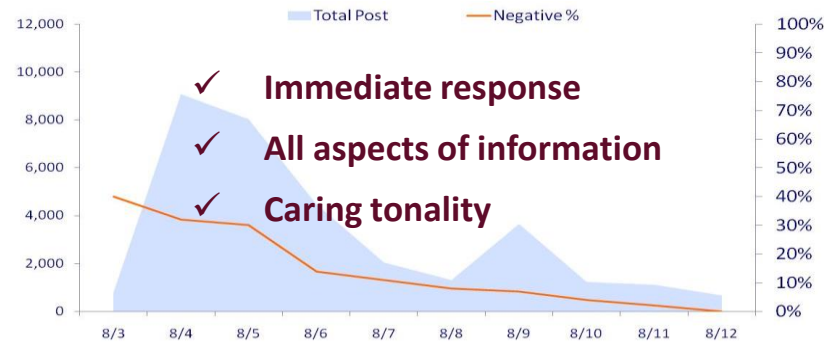
Crisis management in China's digital world

Response attitude directly impacts crisis scope and brand purchase intention

Response Attitude	Average Duration (Days)	Changes in purchase intention% (within 24 hours)	Changes in purchase intention% (within 4 Days)	Changes in purchase intention% (within 1 week)
Denial of issues	20	-403%	-370%	-312%
Admit problems and apologize	28	-348%	-301%	-234%
Immediately release a response indicating an investigation is underway before making any conclusion	13	-219%	-156%	-113%

Quick, Convincing, and Considerate Communication during crisis

Brand K



Brand D



Brand A



Celebrity political views may lead to brand crisis



Issue: Denise supported the independence of Hong Kong

Key Milestone

09:14: Media account Global Times indicated Listerine and Lancôme cooperated with Denise Ho who supported HK and Tibet independence. [Link](#)
19:40: Lancôme issued the statement on its official Weibo account. [link](#)



Denise Ho made a statement on Facebook
[Moov Showed support for Denise Ho link](#)



L'Oreal's Stock Price dropped By 2%
[link](#)



- Guardian Report every 4 hours
- Continuous monitoring on weekend

CIC Daily Guardian Report –
Listerine and Lancôme had cooperation with celebrity who supported the independence of Hongkong and Tibet (20160605AM)

Issue Influence:
On June 4, 2016, [Weibo](#) was the first to report that mouthwash brand Listerine and beauty brand Lancôme, both invited Denise Ho who supported the independence of Hongkong and Tibet, to endorse the brand in HK recently.

By 14:30, 4th June, 2016, the total buzz of this issue was 2,475, including 4 posts and 39 replies on BBS, 37 tweets and 2393 comments on Weibo.
By 18:30, 4th June, 2016, the total buzz of this issue was 3,133, including 4 posts and 39 replies on BBS, 50 tweets and 3040 comments on Weibo, and 1 article on news site.
By 21:30, 4th June, 2016, the total buzz of this issue was 5,710, including 5 posts and 241 replies on BBS, 63 tweets and 5381 comments on Weibo, and 12 articles on news sites.
By 10:30, 5th June, 2016, the total buzz of this issue was 61,045, including 13 posts and 836 replies on BBS, 268 tweets and 59,828 comments on Weibo, 15 articles on news sites and 4 articles on WeChat.

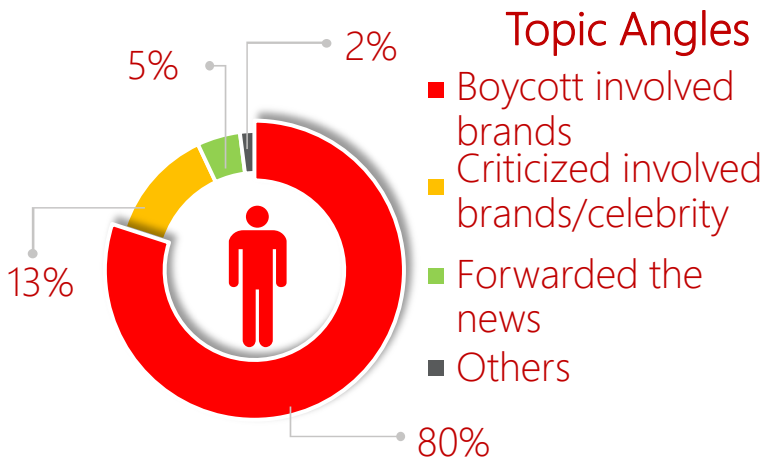
CIC POV: The overall impact of this news was still growing rapidly on social. We will keep monitoring it closely.
• Buzz was contributed by [netizens](#), organic discussions and competitors, no news from government media account was found yet.
• According to the Top Searched Item List from [Sina Weibo](#) by 10:30, "Denise Ho" ranked the first and "Lancôme" ranked the third.
• Meanwhile related negative discussions about Kieh's and YSL were found on social.
• And [netizens](#) ran over to the official accounts of L'Oréal brands and posted the negative comments.

Issue Timeline:

JUNE 4, 2016

【[兰蔻、李瑞峰林被曝支持“港独”的艺人合作？](#)】有网友爆料，在内地热播的进口水品牌李瑞峰林，以及兰蔻化妆品，近日在各地新推出的品牌广告中，邀请了支持港独，并且上港又在日本为瑞峰林代言的何韵诗代言。你们怎么看？[Link](#) //

【[Listerine and Lancôme had cooperation with celebrity who supported the independence of Hongkong and Tibet](#)】Netizen said that top-selling mouthwash brand Listerine and beauty brand Lancôme, both invited Denise Ho who supported the independence of Hongkong and Tibet, to endorse the brand in HK recently...what do you think about it?



WHAT WE LEARN WHEN CAMPAIGN INVOLVING CELEBRITY

CIC POV:

Celebrity selection	1. To scrutinize the political stance and go through all statements on critical topic if any 2. Scope to be expanded to multiple platforms i.e. Weibo, FB, Twitter, Ins etc.
Monitoring during implementation	1. To keep monitoring across social media platforms and regions 2. To include key words of group name, brand, celebrity and politically sensitive topics
Responding time	1. A critical 48hours to respond if anything happens
Contingency plan	1. To make a statement cross platforms 2. To suspend brand digital campaign push immediately and momentarily 3. To manage search engine on social media when incident happened, especially for the pillar brand 4. To keep an eye on counterparts in market and employ diversion

KANTAR MEDIA CIC

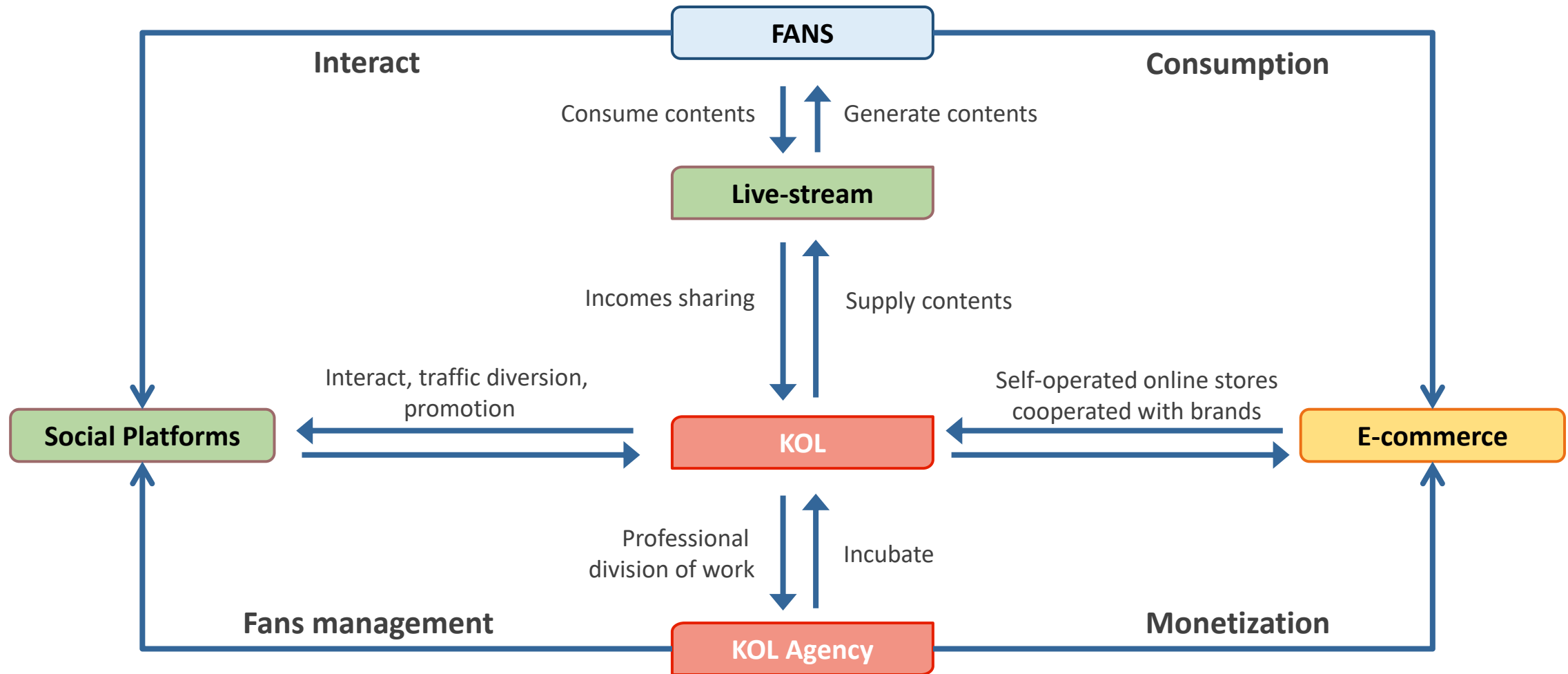


Key takeaways

Social content has become more rich, visual, interactive, real-time, and immersive




Integration of content, KOL and platform drives traffic & conversion



In conclusion

- ❑ Chinese social media is not only unique....it is uniquely important in China as a source of information and as entertainment and purchase channel
- ❑ While good content is necessary, it may not be sufficient for success. The mechanics of dissemination for different platforms are critical for success
- ❑ Weibo and WeChat are 'core' platforms, but new platforms are emerging. A multifaceted approach has become the norm
- ❑ Content, Tactics, KOL and hot topic are key drivers for both E-commerce as well as brand success on social
- ❑ Look to social intelligence on KOL, hot topics and issues to inspire relevant content



*Chinese social media is a powerful force in the world's number one **ecommerce** market driven not only due to the scale, influence and engagement of **social media**, but also the innovative **practical** services most importantly payment, all available cross-device and overwhelmingly active on **mobile***



Thank You!
