Ogilvy China

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2018 WHY BRANDS MATTER ON CHINESE ECOMMERCE

Ogilvy

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FOREWORD

China's ecommerce industry is already the largest in the world, and is continuing to grow at frenetic speed. In 2017, more than 10 million online stores sold over 1 billion products, with a transaction value of more than 1 trillion USD dollars. The recent Double 11 Shopping Festival recorded 25.3 billion USD dollars on Tmall alone, sales figures 3 times greater than Black Friday in the United States. In China, ecommerce has delivered a devastating blow to traditional brick-and-mortar retailers, and dramatically altered how consumers interact with brands.

Never before has a stranger's experience had such a profound impact on what an individual chooses to buy. Every keyword, click or comment alters how users receive product recommendations, thus influencing their brand choices. This is also the first time that the human desire to buy has been so enabled by technology and data. Every imaginable product and experience is just a click away. Brands are more important than ever in this new era, but a conventional approach is not going to cut it. In this paper, we will explore new ways to make brands matter in ecommerce.

10 Million Stores

1 Billion Products

1 TRILLION USD DOLLARS
Transaction

GMV($Billion)

|	30.		
	22.5		
	15.		
	7.5		
	0.		
	Double11	Black Friday	AmazonPrime

25.3 7.9 1.
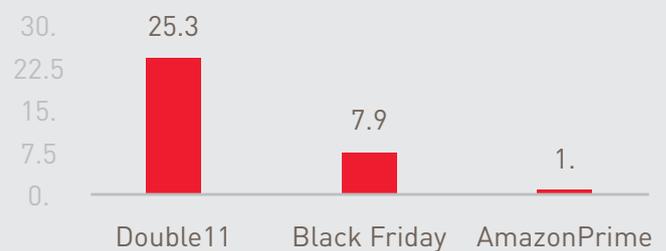
*Ogilvy Analysis, iResearch:
2017 China's Online Advertising Report
Ogilvy Analysis, powered by Moojing, which monitors all ecommerce activities in China

ECOMMERCE IS EVERYONE'S GROWTH CHANNEL

Offline retail saw its first negative growth last year, so more and more companies are turning their focus to ecommerce for growth. Essentially, ecommerce provides infinite shelf space to accommodate all brands. However, the real challenge is finding stores in this new world. If a consumer were to spend just one minute in each online store, it would take them 80 years to view all 10 million stores currently available on Chinese ecommerce platforms. There are only 24 hours in a day, and studies show that time spent on ecommerce accounts for only 8% of total time spent online; an estimated 2 hours per week. In comparison, Chinese consumers spend an average of 8 hours per week on social media, and another 9 hours watching online videos. The competition for consumer attention online is fierce, not just between stores, but all digital platforms.

80 YEARS

A consumer needs to spend 80 years to view all the stores even if she only spends one minute per store

33.9%	18.2%	10.2%	7.9%
WATCHING VIDEOS	SOCIAL NETWORKING	SEARCH	ECOMMERCE

5.3%	4.3%	19.9%
PLAYING GAMES	READING NEWS	OTHERS
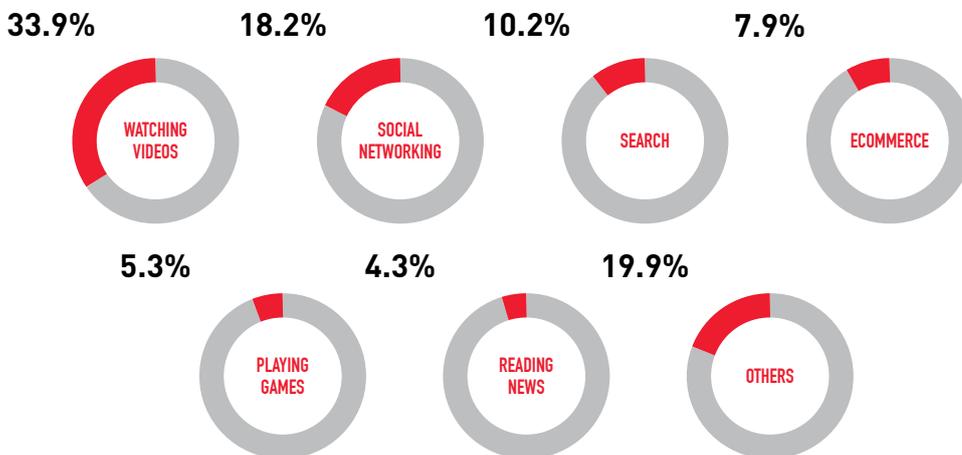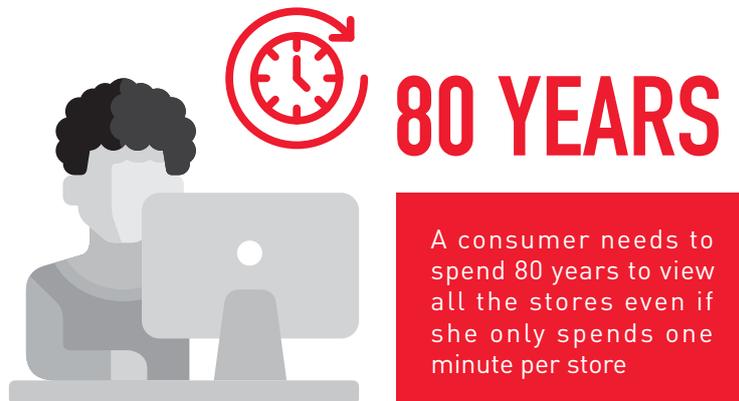
Percent of Time Spent on Digital Platform

As a result, brands must expend more resources to acquire customers. At the same time, marketplaces are seeing a declining growth of online shoppers, and pressure to deliver shareholder profits is increasing. China's leading ecommerce player, Alibaba, saw its active buyer growth decrease from high double digits to single digit growth between 2014 and 2017. Meanwhile, they squeezed a lot more revenue from each active buyer, up to 248 RMB in 2017 from 185 RMB in 2014 [Figure1]. And this increase in monetisation

rates is just the beginning. In the future, brands will be feeling the pressure with regards to customer acquisition costs. Many brands are still focused on the top line growth of ecommerce regardless of the cost, but more mature businesses are starting to evaluate their bottom line. Brands help to simplify choice among the seemingly infinite options of ecommerce. Branded marketing helps achieve greater visibility, and creates trust and engagement with the consumer, in turn building brand value and growing data.
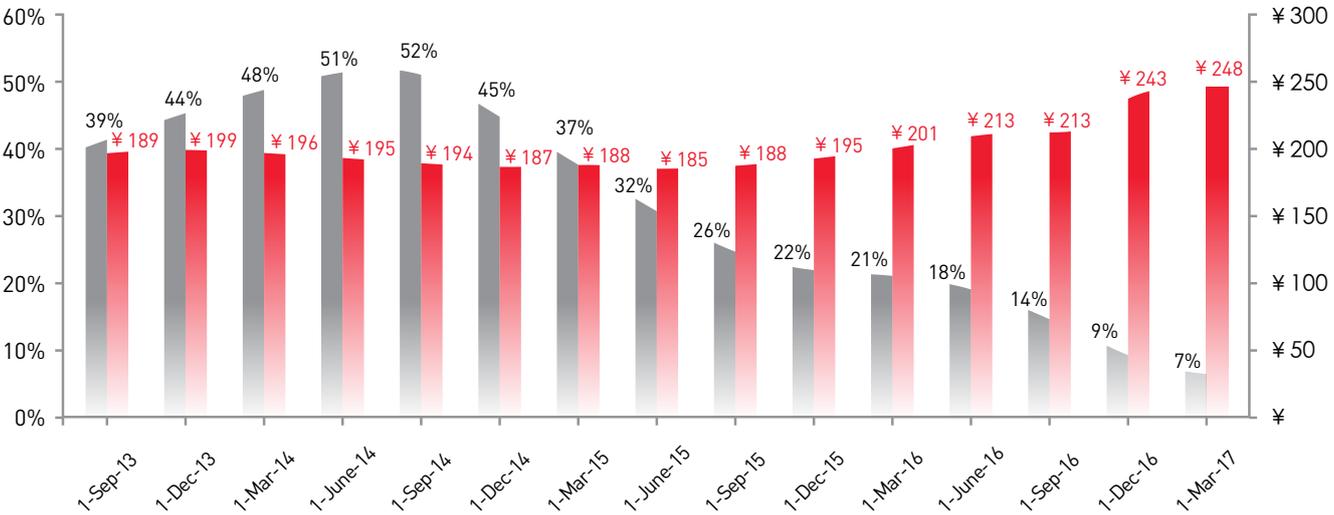

Figure1: Alibaba Active Buyer Growth & Alibaba Revenue Per Buyer

Alibaba Active Buyer Growth

Alibaba Revenue Per Buyer

*Ogilvy Analysis,
 Alibaba Public Financial Records

MAKING BRANDS MATTER ON ECOMMERCE REQUIRES MODERN APPROACH

Although brands matter more than ever on ecommerce, brand owners are struggling to find ways to leverage ecommerce platforms to build their brands. In this new era, we need to think beyond the conventional approach. Brand-building is no longer simply about what you say, but also everything you do and who you serve; it is an ongoing endeavor to be incorporated into every activity.

Modern marketing should be centered on a deep understanding of consumer behavior, powered by data and technology, amplified by creative engagement and delivering brand equity while driving sales. In an increasingly fragmented landscape, and with budgets shifting to short-term conversion activities, interactions in ecommerce must rise above the basic transactional experience to offer something far more precious and personalized to the customer, building value and brand equity at every stage — not just from the top down, but built from the ground up through each experience.

A WORLD view where every time horizon matters

|		
Years	Mattering **For Years**	SHARE PRICE MARKET SHARE REPUTATION INDEX
Quarters	Mattering **Each Quarter**	SALES CPA ARPU
Right Now	Mattering **Right Now**	PULSE ENGAGEMENT SHARES PROMOTIONAL SALES
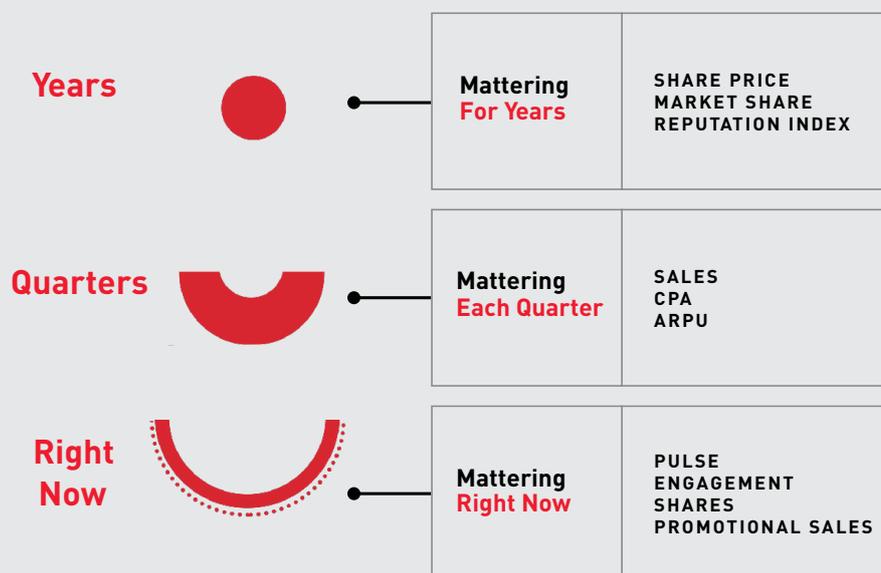
Brands should have platforms that can last for years, which can help them to create a unique identity and define their purpose, and on which they can deploy ideas designed to drive specific growth opportunities and forge meaningful connections and conversations with the consumer. Under these platforms, brands should tune into recent cultural shifts and converse with consumers in meaningful ways. And more importantly, brands should leverage ecommerce channels to meet consumer demands in the moment.

For example, Nike has ridden its 'Just Do It' platform for decades. However, it continues to leverage culturally relevant athletes to connect with consumers. The recent 'Unlimited Pursuit' campaign celebrated powerful women and centered the female consumer in a way that connected naturally to women's products. With the rise of ecommerce, Nike has provided a personalized shopping experience to meet the most urgent consumer demands. NikeID, which allows consumers to customize their products online, has been a major component of its personalized experience. As a result, Nike has ensured that it will stay relevant for years to come, while always meeting short-term consumer demands.

A WORLD view where every time horizon matters (NIKE Example)

Years — Mattering **For Years** — JUST DO IT.

Quarters — Mattering **Each Quarter** — UNLIMITED PURSUIT

Right Now — Mattering **Right Now** — NIKEiD
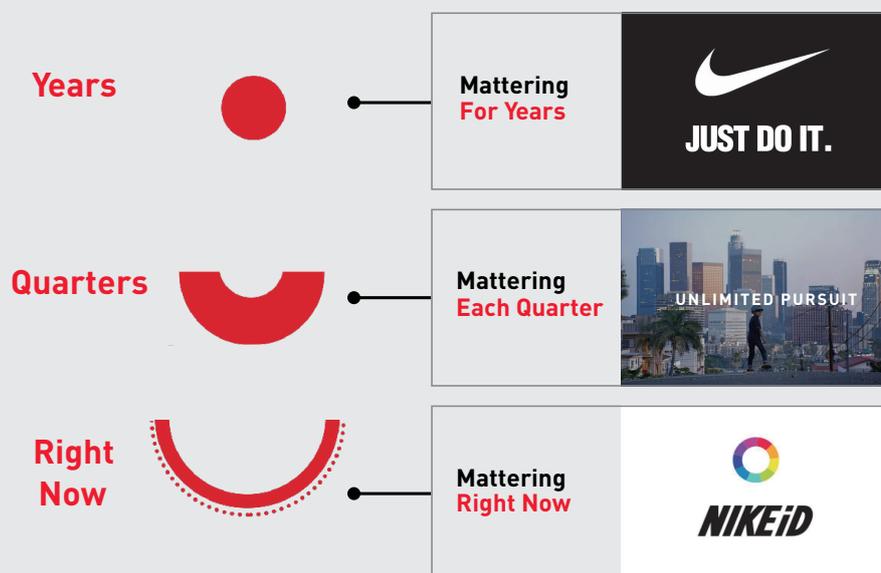
BRAND POWER EQUALS SUSTAINABILITY ON ECOMMERCE

Companies cannot continue to endlessly pour money into marketplaces to acquire customers, nor can they continue to rely on price discounts to attract them. Brand power, measured by BrandZ as the predisposition of a customer to choose your brand over others, has a crucial part to play in maintaining a sustainable competitive ecommerce advantage; brand power is the source of awareness. In this crowded marketplace, where millions of stores are fighting for consumer attention, strong brand awareness is necessary for ecommerce consumers to find you in the first place. Brand power is also the source of differentiation. Unlike shopping in a conventional offline supermarket, where consumers' choices are constrained by limited shelf space, the unlimited shelf space of ecommerce makes differentiation even more important. Without it, how could a consumer possibly choose a shampoo brand from the 2000 choices available? Brand power is also the source of price premiums.
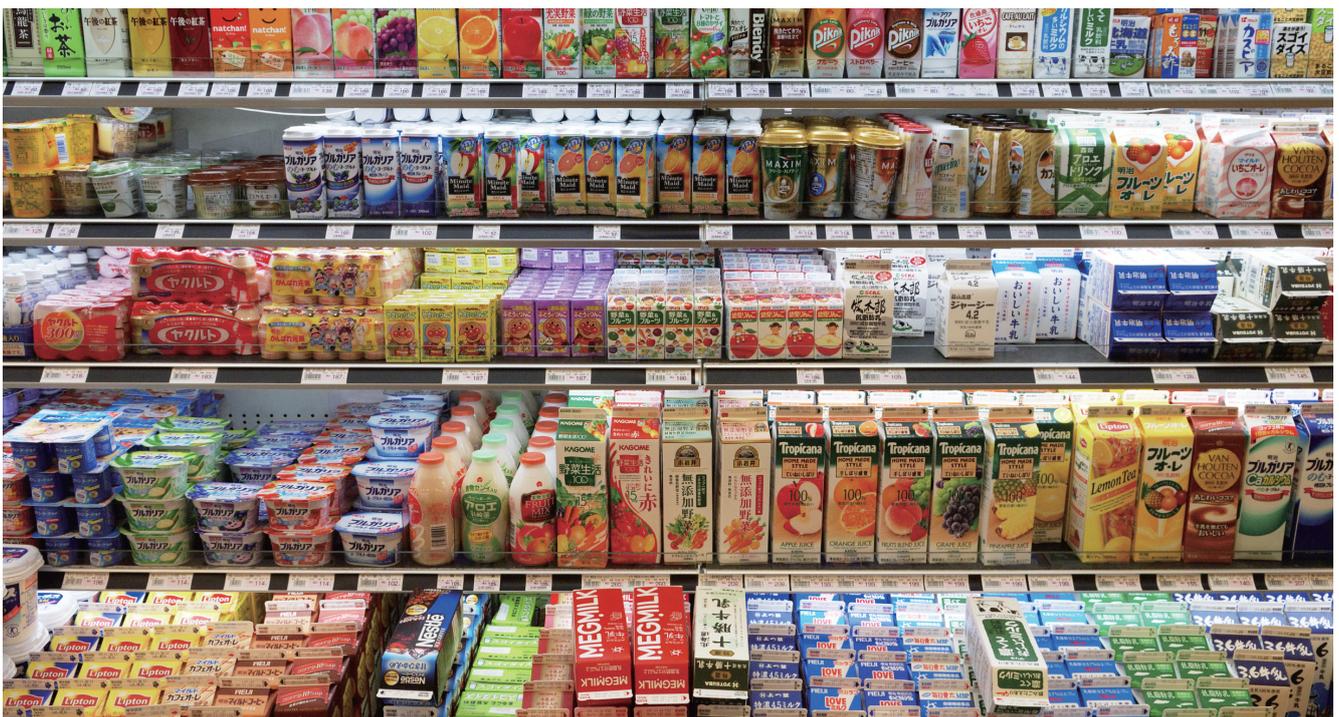
Price discounting and free shipping have been the main tactics used thus far to drive volume on ecommerce in China, resulting in top line growth without bottom line increases. Brand love borne out of the direct relationship between a brand and its consumer is the only way to maintain a price premium. By analyzing hundreds of brands on Taobao/Tmall, we identified a strong association between brand power and greater search exposure; brand power directly correlated to search volume across all 10 categories.

Figure 2: Brand Power VS. Organic Search on Taobao/Tmall

*Ogilvy Analysis, Powered by BrandZ & Tmall Search

Category
- Apparel Men
- Baby Care
- Beer
- Body Care
- Cooking Oil
- Dairy and Milk Product
- Face Care
- Hair Care
- Household Appliances
- Mobile
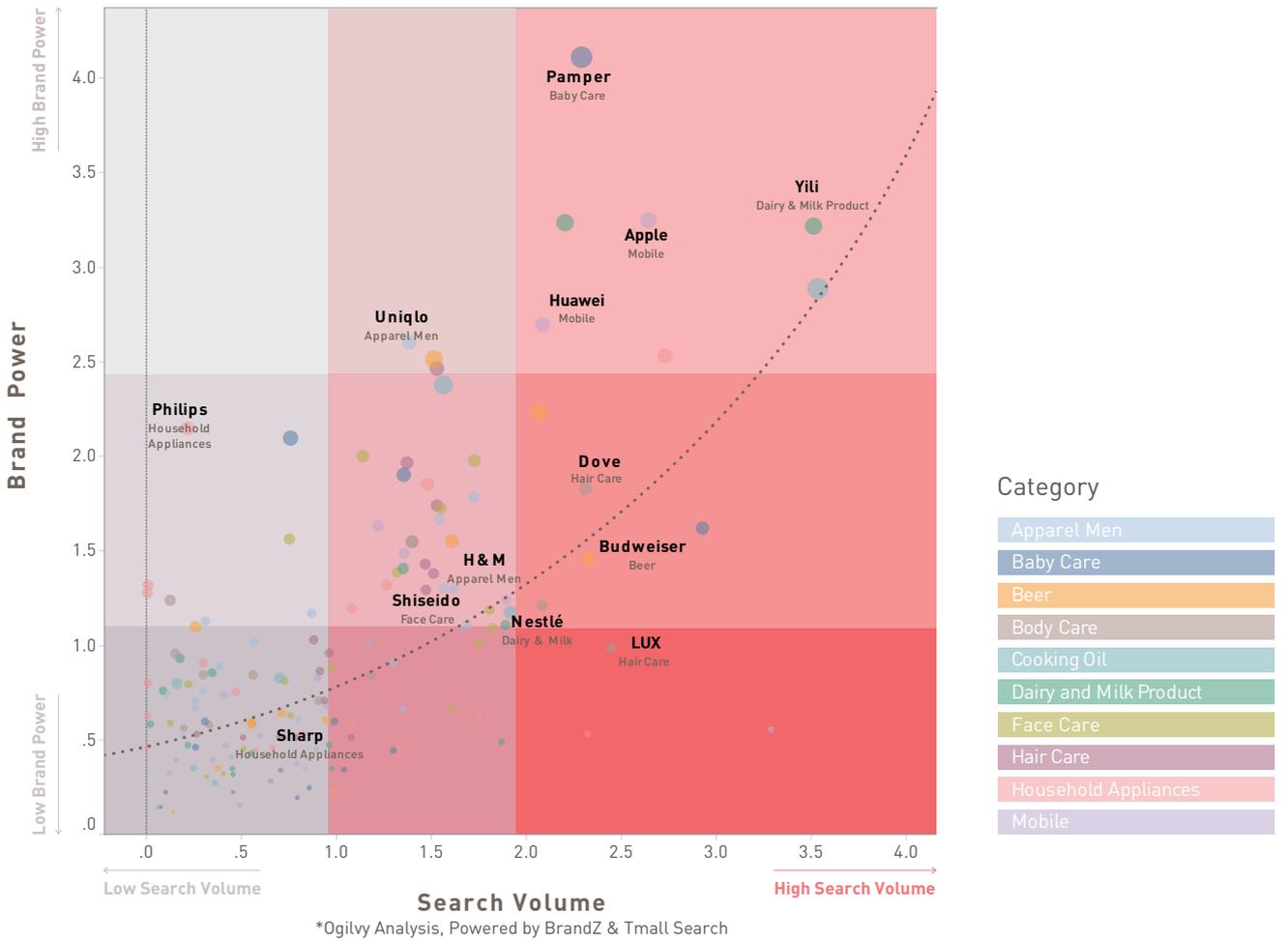
15X

On average, those best known brands have 15 times larger search volume than those less known brands

Correlation Coefficient
Brand Power & Search Volume

- Mobile
- Cooking Oil
- Hair Care
- Dairy and Milk Product
- Beer
- Baby Care
- Face Care
- Body Care
- Apparel Men
- Household Appliances

100%   50%   0%
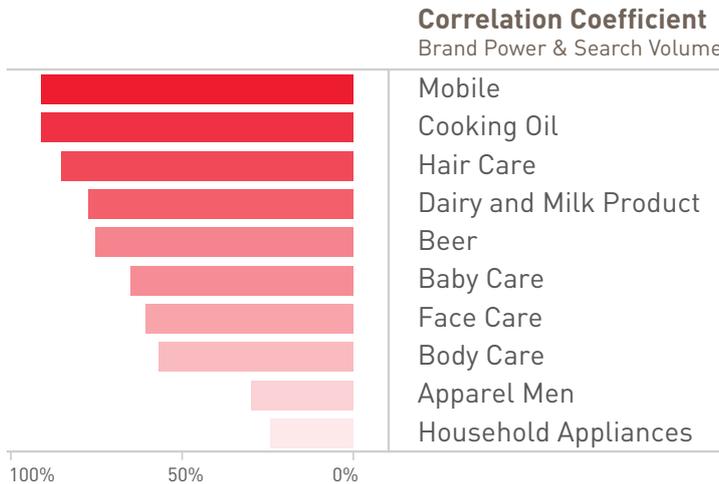
We also performed a similar exercise for price variance. The price variance is defined as the range of price movement on ecommerce over a 12 month period. The higher the price variance, the more likely it is that the brand is relying heavily on price promotions. In most categories, the stronger the brand power, the less likely the brand is to rely on price promotion to drive volume. Some exceptions include hair care and television,

both of which have seen brands drive down prices in order to gain market share. Strong brand equity can translate awareness into organic traffic, and preference into price premium. In the long run, the stores that survive among the 10 million, and the products that stand out among the billion, will be those whose robust branding enables them to maintain that price premium.

Figure 3: Brand Power VS. Price Variance
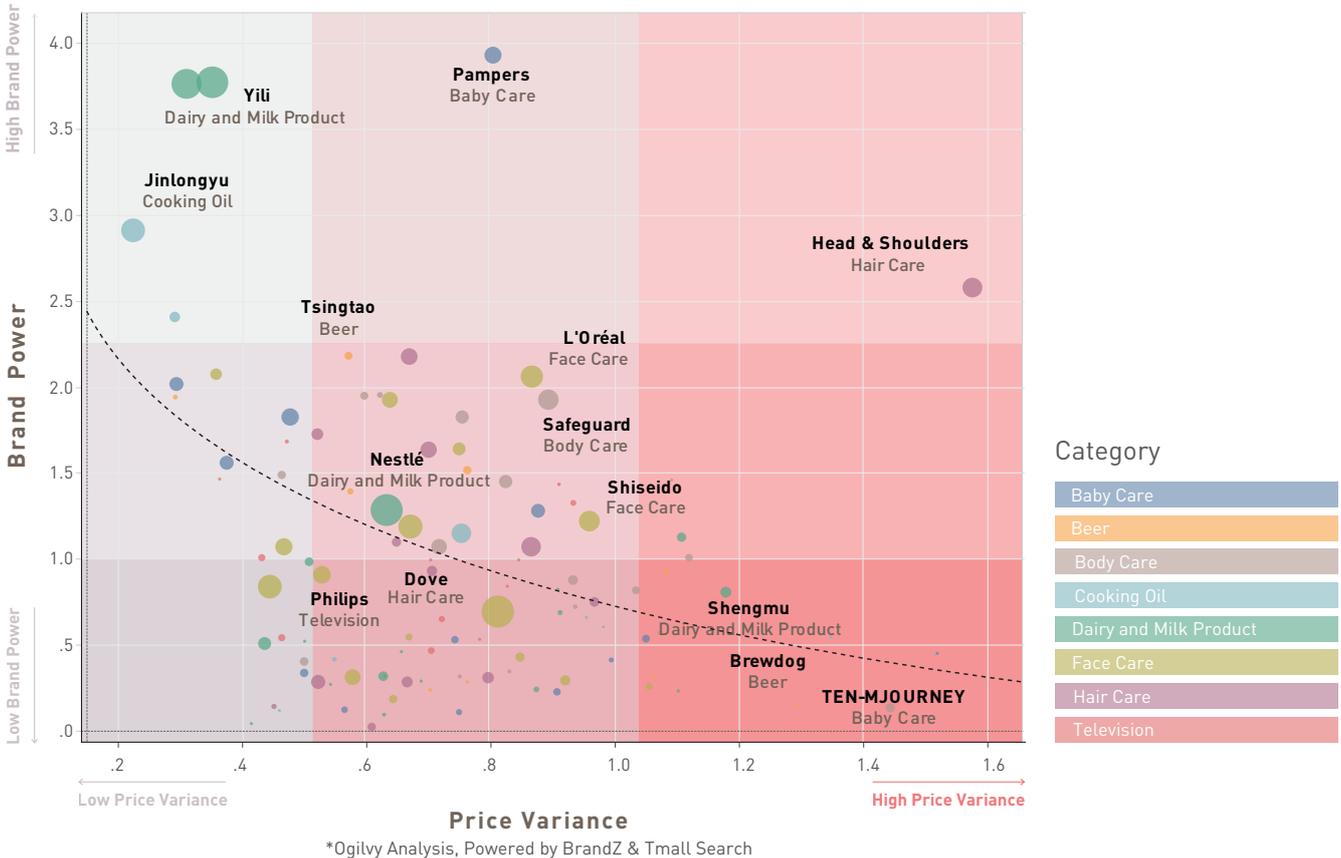
*Ogilvy Analysis, Powered by BrandZ & Tmall Search

20%

On average, less known brands discount 20% more frequently than most known brands

Correlation Coefficient
Brand Power & Price Variance
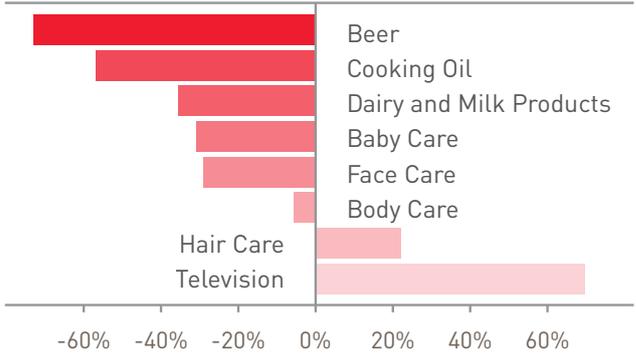
3 ACTIONS TO MAKE BRANDS MATTER ON ECOMMERCE

—

1

LEVERAGE MARKETPLACE BEYOND MEDIA

2

CRAFT ECOMMERCE -CENTRIC EXPERIENCE WITH UNDERSTANDING OF MARKETPLACE ALGORITHM

3

THINK BEYOND CONVENTIONAL ECOMMERCE CHANNELS

1.1 THE MARKETPLACE CONTROLS ALL DATA

Marketers in China who want to build brands on ecommerce need to leverage the extensive consumer data owned by powerful marketplaces. Alibaba accounts for more than 80% of China's ecommerce market, compared with Amazon's share of only 43% in the US [Figure 4]. This dominant position allows Alibaba to collect exponential amounts of data, which in return gives its platform more power.

On an average day, Alibaba's core commerce sites Taobao and Tmall receive about 1.5 billion visits. To put this into context, Google receives about 3 billion search queries globally per day. When the rest of Alibaba's properties, such as Youku and Alipay, are taken into account, Alibaba has almost every Chinese Internet user's profile on hand. Alibaba knows their favorite TV genre, most purchased products, and desired but unattainable items. This extensive knowledge of online consumer behavior allows Alibaba to target consumers with extreme accuracy, resulting in better sale conversion. This translates into the kind of power that makes Alibaba one of the most valuable companies in the world.


CHINA 18% 82% ■ Alibaba ■ Others

USA 57% 43% ■ Amazon ■ Others

JAPAN 29% 71% ■ Amazon ■ Others

UK 16% 84% ■ Amazon ■ Others

INDIA 45% 55% ■ Flipkart ■ Others

Alibaba's core commerce sites Taobao & Tmall receive about 1.5 billion daily visits
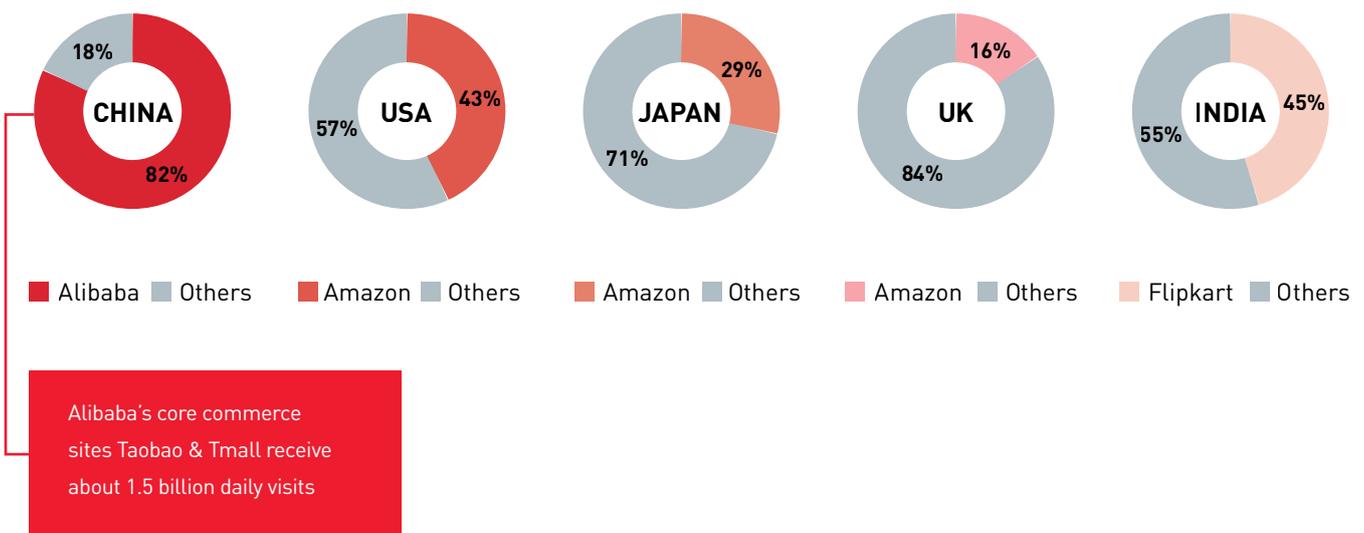
Figure 4: Dominant EC Players

*Ogilvy Analysis, Euromonitor From Trade Sources/National Statistics (2012-2016)
Ogilvy Analysis, Alibaba Pubic Information, Google Public Information, Moojing Monitoring

1.2 MARKETPLACE COLLABORATION SHOULD GO BEYOND MEDIA INVESTMENT

This vast marketplace data is best utilized through media investment. Marketers have innovated around different forms of collaboration beyond conventional media purchases through Alimama, for example by offering deeper price discounts in exchange for free media exposure. Some marketers also incorporate the Tmall logo into their own marketing activities in exchange for more Tmall traffic. As a result, Alibaba has already received more online media investment than any other company, surpassing Baidu. However, in addition to media investment, an everyday expense, marketers can also collaborate with marketplaces by identifying and leading consumer preferences.

The recent successful case of Oreo Music Box is a testimony of close collaboration between brand and marketplace data. The box comes loaded with four original songs representing different stages of youth: junior high school, high school, university and the workplace. You put an entire Oreo biscuit in the music box, turn the switch and the "Oreo theme song" will play. Each time you take a bite out of the cookie and put it back in place, the song changes. Within the 12 hours of launch, 20,000 units were sold out on Tmall. In addition to the sales, Oreo Music Box created buzz that increased brand search volume by 30% within Alibaba's ecommerce platform.

2.1 KNOW YOUR CUSTOMERS, BUT ALSO KNOW THE ALGORITHM

This type of deep collaboration requires marketers to understand the basic operating principles of marketplaces. As mentioned earlier, Alibaba generates almost 250 RMB per active buyer. But this information can be rather misleading when you consider that marketplaces don't only generate revenue from purchases; they also generate revenue when no purchase takes place. For example, Taobao doesn't generate revenue from sales commissions, but from advertising, in the same way Google does. The marketplace algorithm, which is responsible for matching consumer needs to brand content, has to improve continuously in order to extract more value from each visit. Much like Google's search algorithm, marketplace algorithms are a closely guarded secret, although some basic operating principles can be inferred from public information.

In Figure 5, consumer needs are divided into inexplicit inquiry and explicit inquiry.

Consumer Needs	The Black Box - Marketing Algorithm			Brand Content
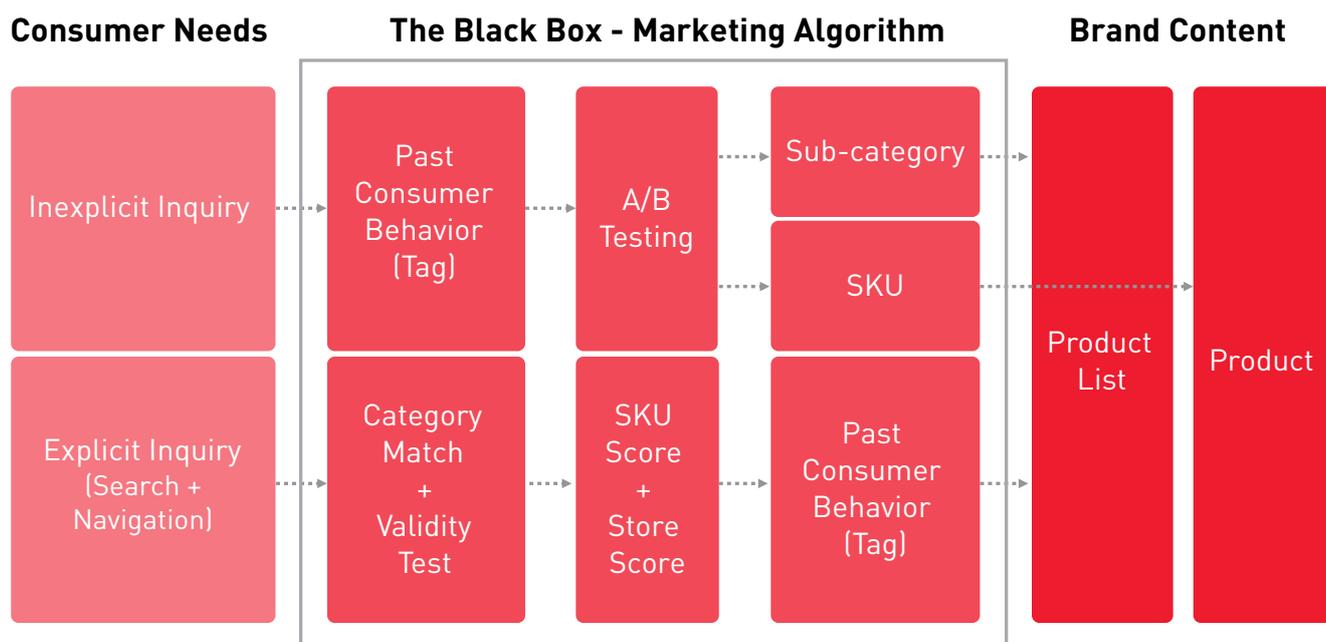
Figure 5: Marketplace Matching Consumer Needs to Brand Content

*Ogilvy Analysis: Based on Alibaba Core Commerce & JD

Marketplace algorithms respond to explicit inquiries similarly to a search engine. It first matches all products with descriptions containing a particular keyword. For instance, if a consumer searches for 'basketball shoes', all products with either 'basketball' or 'shoes' in their name will be matched. Of the products that pass this validity test, SKU and store scores are applied to determine rankings. The primary components of an SKU score include sales volume, purchase conversion and consumer reviews. Recently, Alibaba applied personalization to further improve relevancy. From what we know, personalization has little impact on final product recommendations for explicit inquires. It doesn't make sense to recommend 'tennis shoes' when the consumer explicitly searched for 'basketball shoes', even though the marketplace knows this consumer is an avid tennis fan. Marketplace response to inexplicit inquiry is less transparent, but is based on consumer behavior tags and A/B testing. Every time you click on something in the marketplace, you reveal something about your preferences. The accumulation of clicks turn into a tag that can be used to determine what you see in the marketplace. If you have been searching for or buying infant products in the past 3 months, the marketplace is very likely to identify you as a 'Young Parent'. Therefore, when you open the Taobao application, you are more likely to be shown a diaper than a beer. However, sometimes a young parent might need a beer more than diapers, so marketplaces will leverage A/B testing to validate some hypotheses. In this case, marketplaces will show the young parent beer instead of diapers on Friday evening to test the receptivity. This isn't a new practice in the era of social media marketing; search engines such as Google, Baidu and social media platforms like Facebook have been using a similar approach to maximize ad revenue for years.

Validity Test – Alibaba has rules to ensure the accuracy of product description and other relevant legal requirements

Some mature brand owners have already taken steps to respond to marketplace algorithms:

- Ongoing SEO to improve brand exposure on search results pages
- Paid search optimization through keyword bidding or target audience modification
- Hero products (high SKU scores achieved through low prices and heavy investment) to drive store traffic
- Marketing through unified consumer identifiers to reach potential customers more accurately
- Product innovation to better match new consumer demands
- Price promotion to improve SKU & store scores

While all good practices, these tactics alone still won't help brands win on ecommerce consistently. Brand owners must take a more holistic view to win the entire customer experience, at every touch point.

2.2 FOCUS ON THE CUSTOMER JOURNEY – EVERY 3 MINUTES

The entire online customer journey, from knowing a brand to purchase, can be condensed into a few clicks. Our research shows that on average, consumers spend only about 3 minutes on each ecommerce visit; that's a vital 3-minute window in which brands can engage and convert customers. In Figure 6, we evaluated Taobao, Tmall, JD and Yihaodian, four of the biggest marketplaces in China. Based on their behavior, we classified consumers into four groups:

A browser is defined as a consumer who shops without a specific intention in mind. They accounted for the majority of

Figure 6: Marketplace Customer Journey
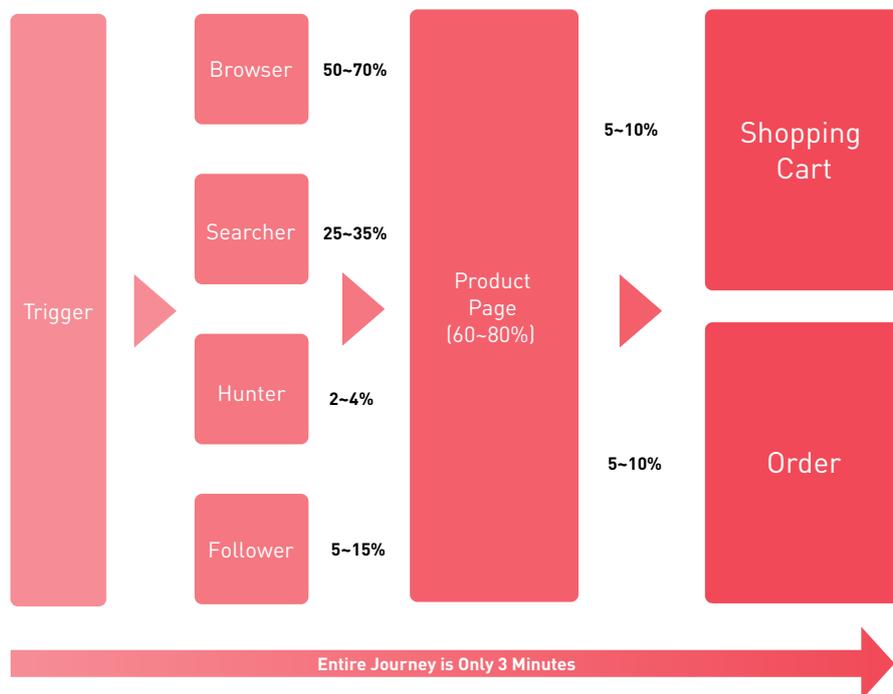
Browser -Consumer who rely on visual cues to narrow down their choice
Searcher-Consumer who rely on search box to narrow down their choice
Hunter   -Consumer who already know the choice,
                return to check the shopping carts or favorite products
Follower -Consumer who follow the external links to ecommerce sites

*Ogilvy Analysis, Based on Alibaba Core Commerce & JD & Yihaodian
Ogilvy Analysis, iResearch, CNNIC

A searcher, as the name implies, searches on marketplaces, indicating an explicit request.

A hunter is a consumer who returns to favorite shops, products, or shopping cart. Hunters are usually consistently on the very last step of purchasing.

A follower comes from an external link outside of the marketplace, and is usually drawn in from celebrities or promotions.

A brand can initiate an engagement to trigger a consumer to be any one of these four types on ecommerce.

For example, a beer brand has relied on its association with music in China to drive brand equity among young consumers in the past. As more consumers are shifting online to purchase beer, the brand adapted the trend by expanding its marketing activities with the integration of ecommerce marketplaces. In order to influence browsers, the brand invited Tmall to be part of offline music activities. In exchange, Tmall leveraged its big data to help the beer brand proactively target those browsers. For the searchers, the brand offers offline engagement opportunities such as concert tickets to increase the likelihood of conversion. The brand also collaborated with Tmall to invite a list of KOLs to participate in music events and engage their followers through live-streaming. In just one year, it became the top-selling brand on ecommerce in China.

2.3 CRAFT ECOMMERCE-CENTRIC CUSTOMER EXPERIENCE

There are simple 3 steps to craft
an ecommerce-centric customer experience:

1 External triggers to influence the consumer mindset

2 Internal ecommerce messages to drive traffic

3 Own content to deliver sales and brand love

Figure 7: Ecommerce Centric Experience Planning Cheat Sheet

	External Trigger	Internal Message	Brand Content
Browser	Lifestyle/Emotional messaging through broadcast media	Visual cue to meet the lifestyle/emotional needs with the product	Deliver brand promise
Searcher	Solutions for consumer needs delivered through occasion driven channels	Key product benefits	Visual presentation of key selling points
Hunter	Create urgency through re-targeting or CRM program		Deliver peace of mind
Follower	Create perception of popularity through social media or celebrities/KOLs	Simple & fun engagements that reinforce popularity	Celebrity/KOL endorsement or customer comments

The overall marketing effort should influence all four types of customers on ecommerce. However, different groups will be influenced by different methods. Conventional advertisements delivered through broadcast media to smaller sized audiences with high frequency might be the best choice to influence browsers. Messaging that highlights product benefits should be deployed to influence searchers, alongside product and package innovations. Retargeting messages that create urgency should appeal to hunters. Social media and KOLs should be prioritized for followers.

Brands should understand that these four types of consumer can overlap and transition. A browser can turn into a searcher, and a follower can turn into a hunter. The totality of four experiences offered by brands is the total customer experience. Consistency and fluidity should be the foundation. A brand cannot trigger a browser with premium lifestyle messaging at an upscale coffee shop and fight for a searcher with deep price discount at the same time. Brands need to design a 3-minute journey with the total customer experience in mind.

3. THINK BEYOND CONVENTIONAL ECOMMERCE CHANNELS

In addition to conventional marketplaces, the growth of Chinese ecommerce offers brands a number of alternative options. This continual growth is likely to be fueled by four key drivers:

- Penetration of lower-tier cities and rural areas
- Expansion of categories such as FMCG (including fresh food)
- Upgrade of existing mature categories such as apparel and electronics
- Alternative ecommerce driven by post 90's millennial consumers

Dominant players such as Alibaba and JD will continue to grab a large share of growth, especially from lower-tier cities and rural areas. However, the new emerging players do have opportunities to capture category expansion, demand upgrade and the needs of young, post 90's consumers. The red dots in Figure 8 indicate the emerging channels that are meeting the demand for consumption upgrade. Brand-owned ecommerce channels such as Xiaomi and Huawei are offering more authentic brand experiences.

Figure 8: The Emerging Ecommerce Channels
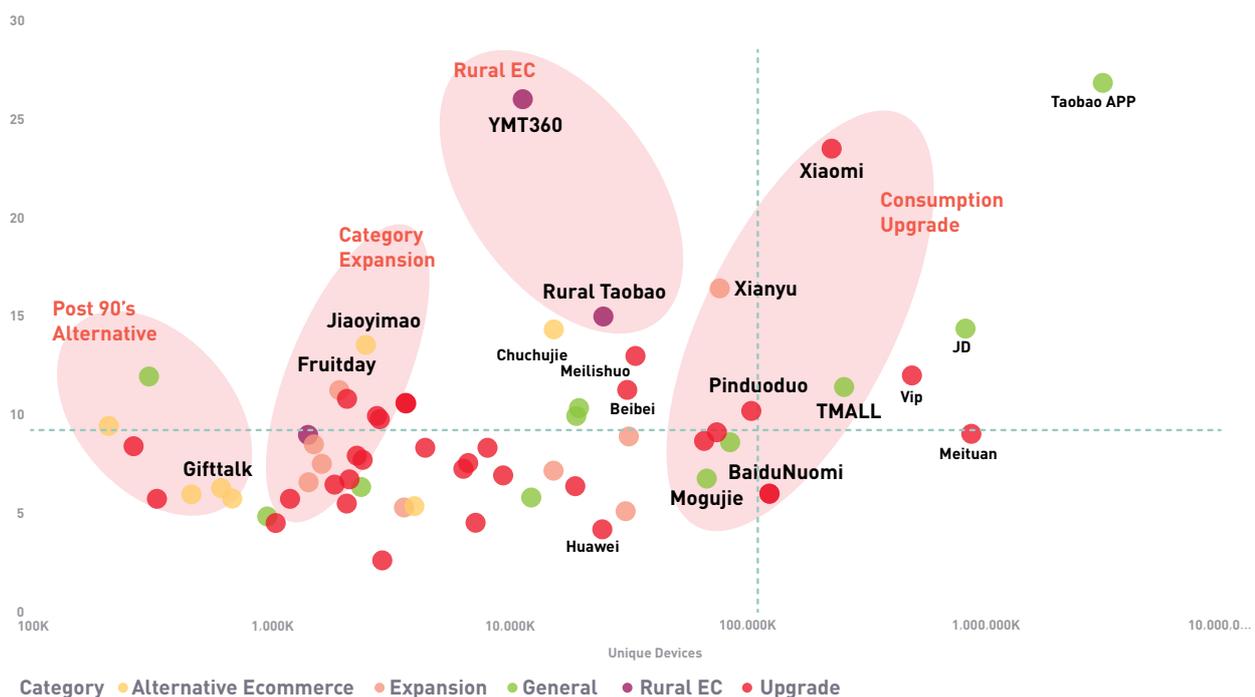
*Ogilvy Analysis, iResearch
Remark: Please see platform introduction in appendix.

Vertical ecommerce channels such as Beibei and Yoho are offering more category knowledge to consumers. The pink dots indicate category expansion channels. Traditionally, categories such as FMCG (Fast Moving Consumer Goods), including fresh food, have low online penetration. New players such as 'Fruitday' are aggressively driving consumer habits, despite delivery and margin challenges. Although still in its infancy, alternative ecommerce tailored to the millennial post 90's generation has a very different model. For instance, Jiaoyimao focuses on the trade of virtual goods for online games.

3.1 MATURE BRANDS SHOULD EXPLORE THEIR OWN BRAND ECOMMERCE STORES

The rules for the emerging channels are different from marketplace collaborations. Owned ecommerce shops obviously give brands the biggest control over customer experiences. As the cost of customer acquisition on marketplaces continues to rise, brand-owned ecommerce shops become a better option for brands within mature online categories such as apparel, 3C and baby care. The advantage of owning the entire customer experience is enormous. For example, one of the leading fast-fashion brands, H&M, operates its ecommerce independently. Due to the complete control of all touch points, H&M is able to connect

WeChat, online brand store and offline stores seamlessly, offering consumers better experience online, and importantly, in their brick-and-mortar stores. Through an integrated consumer view, H&M is able to identify consumers' needs and interests based on their social behavior and content interest, and recommend what they like and cross-sell, which increased its engagement and traffic in triple digits over one year. Targeted messages are delivered through WeChat to drive quality traffic to either online or offline stores, and then used to generate consumer feedback to create retargeting, repurchase and advocacy.
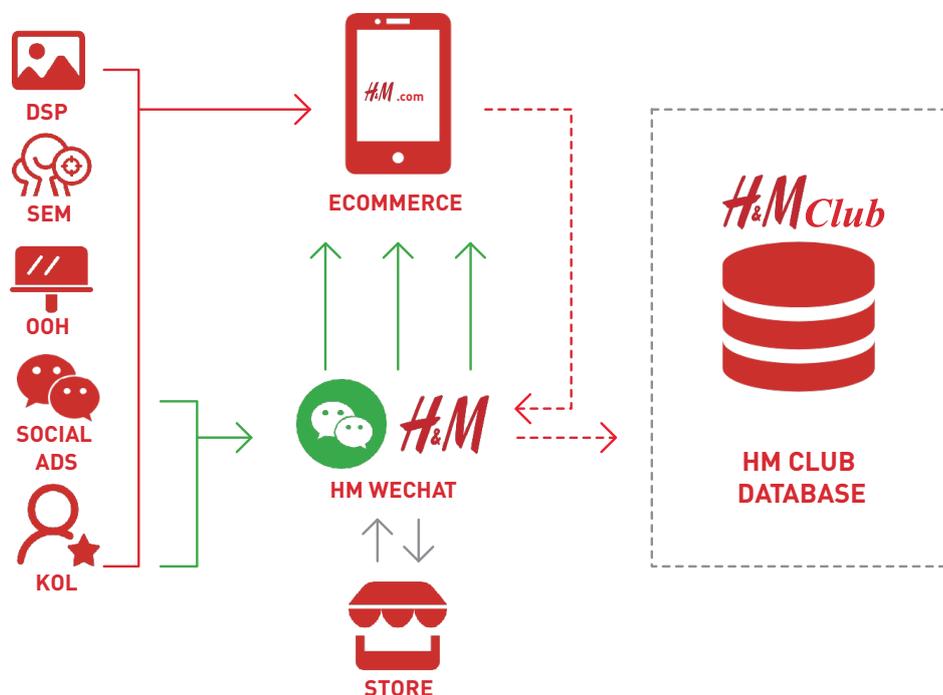
3.2 FMCG BRANDS CAN LEVERAGE EMERGING CHANNELS TO INNOVATE

FMCG are usually purchased with high frequency. The low-ticket price and high delivery costs have prohibited the growth of this category on ecommerce. As more players are moving into this space to explore different business models, brands have an opportunity to really innovate the customer experience. Freshhema has already achieved enormous success through its new model in China. Merging supermarket, restaurant and storage in one store has enabled the company to offer fresh food delivery to the customer's door in 30 minutes. The integration of storage and store and its policy to deliver within 3 km radius greatly reduces delivery costs, and providing an in-store experience can also potentially increase the basket size while lowering the cost of customer acquisition.

What They Need to Do
Simple Interaction With One Click

What They Feel & Get
Convenience & Freshness in Every Occasion

Supermarket

Restaurant

Warehouse/ Storage

Data Backstage

Customer

Customer

SUPERMARKET
Buy Fresh Goods

DINING
Eat Fresh Food

HOME
Get Fresh Food Delivery in 30 minutes
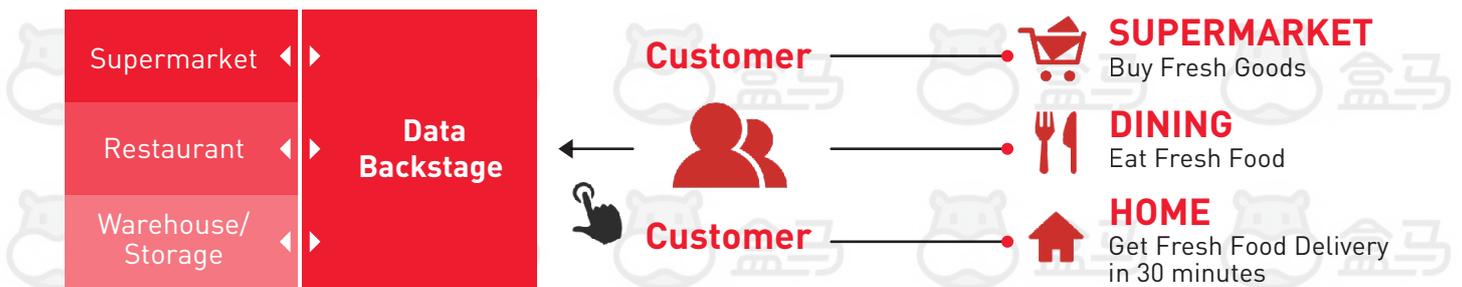
★ Minimize Working Process (Supply Chain, Logistics, Delivery)

3.3 CONSUMERS ARE BUYING INTO CURATED CONTENT AND SOCIAL COMMERCE

Younger consumers in China demand an abundance of choice from ecommerce, at low prices. They look for quality, and see the values of a brand as a means of expressing themselves. As a result, alternative ecommerce focused on content curation and powered by social media is booming in China. As the leading content driven ecommerce platform, Xiaohongshu（小红书）introduces products through journals, often written by average consumers. Journals can relate the experience of new product trials, or stories behind the product creation. As content creators gain more followers through social media, they become influencers that can potentially collaborate on the product creations. Ujipin（优集品）, a smaller player, takes content commerce in another direction. It offers consumers uniquely selected products, curated by experts. Unlike mainstream ecommerce platforms such as JD or Alibaba, these alternative platforms focus more on quality over price, and believe less is more in terms of choice.

FANS

Content Push ↑ Feedback ↓ Traffic ↓

Based on Fan's Needs

KOL Content

Fit KOL's Attribution

Sales Conversion

Product Upgrade Based on Ecommerce Feedback

Product

Ecommerce
(Including Social Commerce)
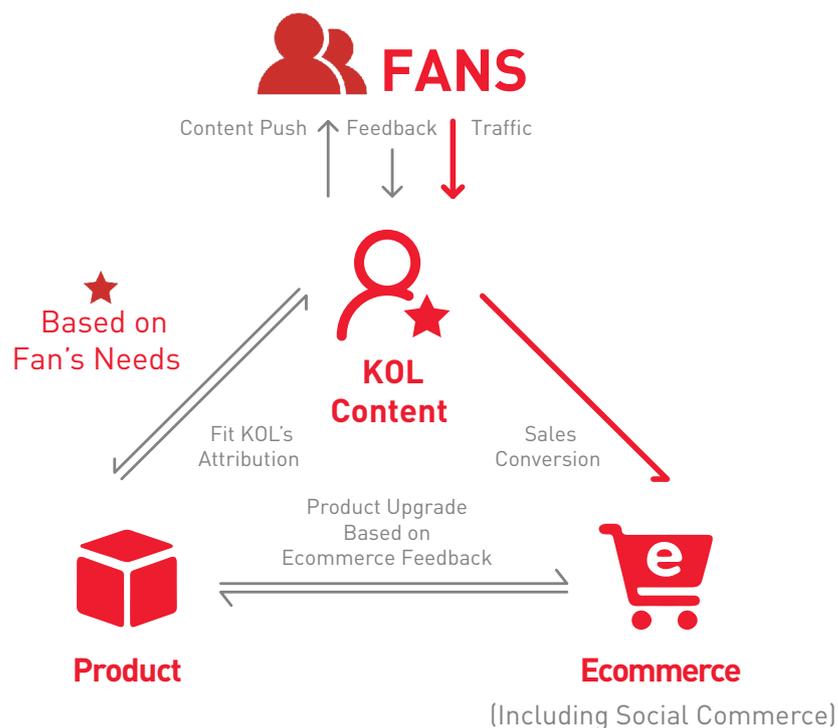
Remark: Please see platform introduction in appendix.

CONCLUSION

To put it simply, brands and ecommerce need each other. In this mutually beneficial relationship, ecommerce offers brands options to simplify choice, provide shortcuts and build value amid an infinite sea of possibilities, while branded marketing in ecommerce creates visibility, trust and engagement with the consumer.

With the rapid development of Chinese ecommerce, brands are facing as many opportunities as challenges. The landscape is changing incredibly quickly; after all, Tmall was only created in 2012. The increasingly crowded marketplace will pressure brands to adopt a less conventional approach, better defining who they are and delivering value through personalized content, platforms and experiences. Making brands matter in this new era, where data and technology disrupt customer relationship norms, will require a deep understanding of every step of the customer journey and of the marketplace algorithms which determine brand exposure.

Ogilvy's proprietary process enables brands to balance and integrate their activities across different time horizons, so that brands can win the year through a single core idea which embodies the brand identity, win the quarter with specific growth opportunities, and win in the now via everyday connections, conversations and cultural moments.

A holistic approach is needed to tackle one visit at a time, but the totality of customer experience needs to remain consistent and seamless, regardless of the channel, whether online or offline. The brands that succeed in this new landscape will be those that look beyond mainstream ecommerce to become pioneers in the newly emerging marketplaces that reflect changing consumer needs. The young Chinese audience has already demonstrated an appetite, even a need, for alternatives; this is only going to increase with time. For brands to matter in this brave new world, they simply need to do what successful brands have always done: matter to the individual.
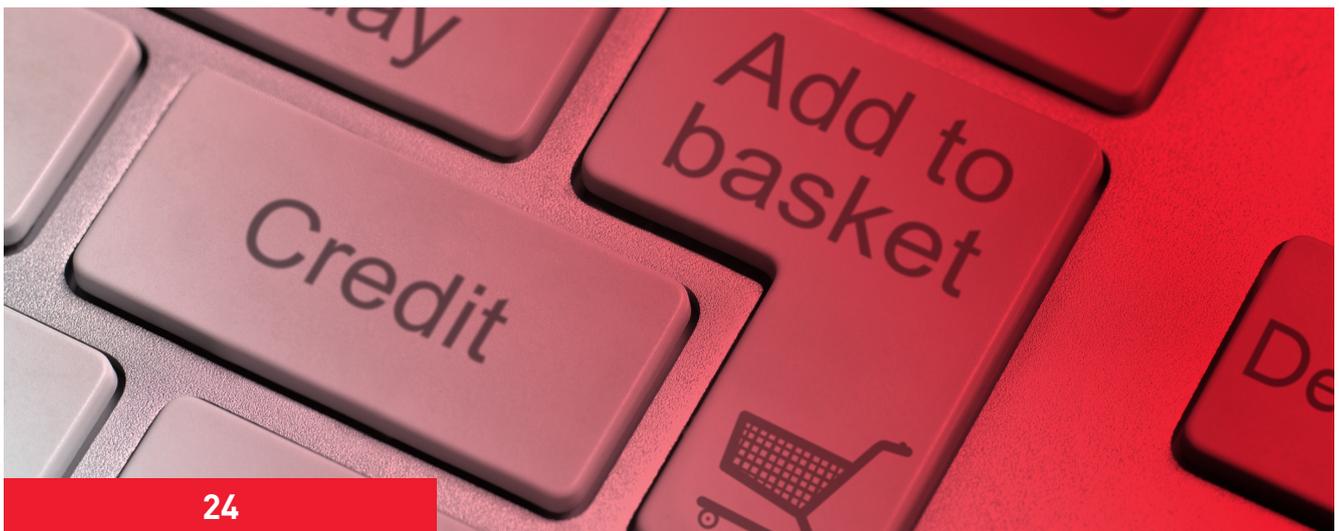
2018
WHY BRANDS
MATTER ON CHINESE
ECOMMERCE

Ogilvy

APPENDIX: EMERGING CHANNELS

Gifttalk（礼物说），as a new generation ecommerce platform, focuses on gift and global good-quality product guideline, which includes gift, furniture, apparel, accessory and snack category. Users can not only check handpicked goods, but also choose domestic and global gifts by preference.

Jiaoyimao（交易猫）is a mobile game trading platform that gamers can do transaction on game currency, property and game ID. The transaction is consisted of national ios, Andriod system, etc.

Rural Taobao（农村淘宝）is a Alibaba's strategic project. Alibaba deeply cooperates with governments in different regions, leverages ecommerce platform as foundation to build up service net in both county and village to realize both-way function on 'Internet goods to village' and 'rural goods to city'.

Pinduoduo（拼多多）is a mobile shopping APP with social attributes. User can launch group buying together with friends, family or neighbors to get better price. It aims at generating man power to use better price to get better products.

Xiaohongshu（小红书）is established in 2013, as a shopping sharing community with consumer's purchase UGCs, which has been grown into one of the biggest global community ecommerce platform. Xiaohongshu is not only a community, but also a cross-border e-commerce platform with full of consumer's word of mouth. There is no commercial promotion on Xiaohongshu, only real comments on dynamic product, which not only makes the product more reliable, but also delivers authentic lifestyle.

Ujipin（优集品）is one of the biggest B2C ecommerce platform of design brands. It is established on 2011, focuses on global well-known design brands to offer consumer daily goods with better design and quality, meanwhile with membership discount. Compared with regular ecommerce platform to offer standard products, Ujipin more focuses on global buyer team to offer well-designed product in stationery, furniture, electronics and accessory industry.