

BRANDZ™

TOP



CHINESE
Global Brand
Builders 2019

中国出海品牌50强

**The hottest brands &
the brands to watch**

IN ASSOCIATION WITH

Google

WPP

Methodology by
KANTAR



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Welcome

FRESH ROUTES TO MARKET SUCCESS

Physical and AI networks open up
a world of new opportunity

David Roth
CEO, The Store WPP, EMEA & Asia,
Chairman, BrandZ™ and BAV Group



What a difference a year makes!

As we launch this celebration of China's Top 50 Global Brand Builders, we reflect on what has changed since the 2018 issue, and since our inaugural ranking in 2017. Many of the brands featured in the list remain the same – testament to their commitment to building not just a global business, but also a global brand.

But the context in which Chinese businesses are pursuing the international market opportunity has significantly changed.

The physical routes to market for Chinese brands have become much more efficient - the result of huge investment in infrastructure in China, across the region and beyond. New land and maritime routes are creating a physical network that is highly beneficial to Chinese brands.

There are more ports, airports, rail networks and roads in countries around Asia-Pacific, and as far away as Africa. The efficiencies this network creates for the distribution of goods are making it easier and less costly for Chinese brands to expand into new markets and, ultimately, go global.

Alternative thinking

These new physical routes are giving Chinese brands easier access to international markets at a time when, with the pace of economic growth at home slowing, many entrepreneurial business leaders are looking to access other markets.

But what makes this an especially exciting time for Chinese global brand builders is that Artificial Intelligence is allowing the creation of another kind of network – a neural one – that shows them how to make smarter decisions on where – and how – to invest.

Artificial intelligence can help brands be far more efficient. It can help determine the most effective media strategy to reach the right people at the right time, and optimize it in real time.

Perhaps most exciting, AI can help inform the creation of the content that is most likely to have a real impact on a target audience, leading not just to more reach, but a greater depth of engagement. That all leads to a better brand experience, and there's real, long-term value in that.

This technology is becoming more sophisticated all the time; machines learn and improve, helping brands and their agencies solve complex challenges on a scale that we couldn't achieve alone, and in ways we couldn't have imagined just a few years ago.

In combination, the physical networks resulting from newly developed infrastructure, and the neural networks available through AI, now give Chinese brands an historic opportunity.

We at WPP are building AI into the way we analyze and draw insights from our vast repository of BrandZ™ data.

Our just-launched suite of AI-powered, conversation-based tools enables us to instantly pinpoint essential data, and more easily identify the patterns and preferences that can power the next phase of growth for partner brands.

WHAT'S IN STORE?

I am delighted to once again be working with Google China VP of Sales Annabel Lin and her highly professional team on this report, uniting our formidable resources to shine a guiding light for China's most ambitious, outward-looking brands.

In this report, we chart the dynamism and rising competitiveness of the Chinese businesses that are becoming global brands.

Through our unique, proprietary "Brand Power" scoring system, we measure the appeal of Chinese brands in the minds of global consumers. We also link this with Google surveys and Google/YouTube search index to understand what's driving the most successful Chinese global brand builders, and highlight areas in which they are deficient when compared to the international competition.

The result is a must read for any Chinese brand owner considering expanding internationally – and those already overseas who are contemplating their next move.

This year's report also features:

- A "deep dive" into the global opportunities in three key categories
- Three emerging markets with fresh opportunities for Chinese brands
- Insightful interviews with senior executives at leading Chinese global brands: HUAWEI, ECOVACS, ZAFUL and IGG

■ 10 Top Takeaways for Chinese brands with a global vision

WPP and Google are at the cutting edge of the advances that help shape the global opportunity for Chinese global brand builders. We also have a deep understanding of what motivates consumers, how to fulfil their expectations, and how to build powerful, valuable and extraordinary brands that consumers and investors love.

If we can be a part your global journey, please feel free to contact any of the WPP companies who have contributed to this report, or Google's Annabel Lin, or me directly.

Sincerely,



David Roth
CEO, The Store WPP, EMEA and Asia
and Chairman BrandZ™ and BAV Group
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Foreword



Yunquan Yu

Deputy Director and Researcher at the Academy of Contemporary China and World Studies (ACCAWS); Editor in Chief of the Publication “International Communications”

GLOBAL CHINESE BRANDS

A glittering ‘Business Card’ for Nation’s Image

China’s national image around the world has become both more prominent and more positive in recent years, providing a springboard for brands as they work to go global.

International consumers’ impressions of “Made in China” have shifted significantly. This is in part because of their positive experiences with key ambassadorial brands, but also as a result of changing perceptions as China’s role on the world stage improves.

China’s role in global affairs has been rising, and China’s image as a major global country is more significant and more outstanding.

Opinion polls around the world show that the international community’s recognition of China’s achievements is on the rise, as is the reputation of the country – and the brands and products that come from there.

The slowdown in the global economy has shone a spotlight on China’s role in maintaining economic momentum. Infrastructure projects forming part of the “Belt and Road” initiative around the region and beyond have also helped promote other countries’ economic development and, as people’s lives have improved as a result, this has brought a warmer, more positive impression of China internationally.

New vision

Perceptions of China have also become more diverse and multifaceted; the country has long been seen as a big one, with a rich cultural heritage. Now, that view is enhanced by innovative, cutting-edge technological achievements made by modern China.

The global attention given to China’s successful landing on the dark side of

the moon is a good example of how the country’s technological strength is now perceived.

The China National Image Global Survey and Chinese Enterprise Global Image Survey Report, both initiated by the Academy of Contemporary China and World Studies (ACCAWS) in collaboration with Kantar Millward Brown over five consecutive years, show increasing recognition of the importance of China’s role in world economic and political affairs.

Reports also reflect international consumers’ positive experiences with Chinese tech brands, and their understanding of accomplishments such as China’s high-speed railway technology.

The result is that “Made in China” is gradually shifting to “Intelligently manufactured in China”.

The strengths consumers associate with a country are extended to the products and brands that originate there, and the same applies in reverse, creating a symbiotic relationship between a country and its brands – the so-called “halo effect”.

Because of the outstanding performance of internet-based companies such as Alibaba, Huawei, and Xiaomi, as well as infrastructure construction enterprises like railway specialist CRRC and the State Grid Corporation of China, the international community has been deeply impressed by China’s national image of a strong capability of technological innovation.

Golden opportunity

China’s rise to international political prominence, its cooperation and closer relationship with neighboring countries, and those further afield, as well as the shift in consumer views of China and its products, all give Chinese brands a unique opportunity to go global.

Yet there are significant challenges, not least the rise of trade protectionism in several major markets. This is undoubtedly dampening demand for Chinese-made goods in some markets at a time when international competition in many business sectors is becoming more intense.

The intensity of global competition is evident in the most recent BrandZ™ Top 100 Most Valuable Global Brands ranking. This shows that even though Chinese brands are gaining ground, there are still only 14 in the Top 100, compared to 55 brands from the US.

There’s also the challenge posed by rising consumer expectations of Chinese-made products and services. This means that the bar moves ever higher, and Chinese brands have to work even harder to be considered “good enough”.

And there’s more to this than simply producing world-beating products and services. Equally important is to communicate successfully with consumers.

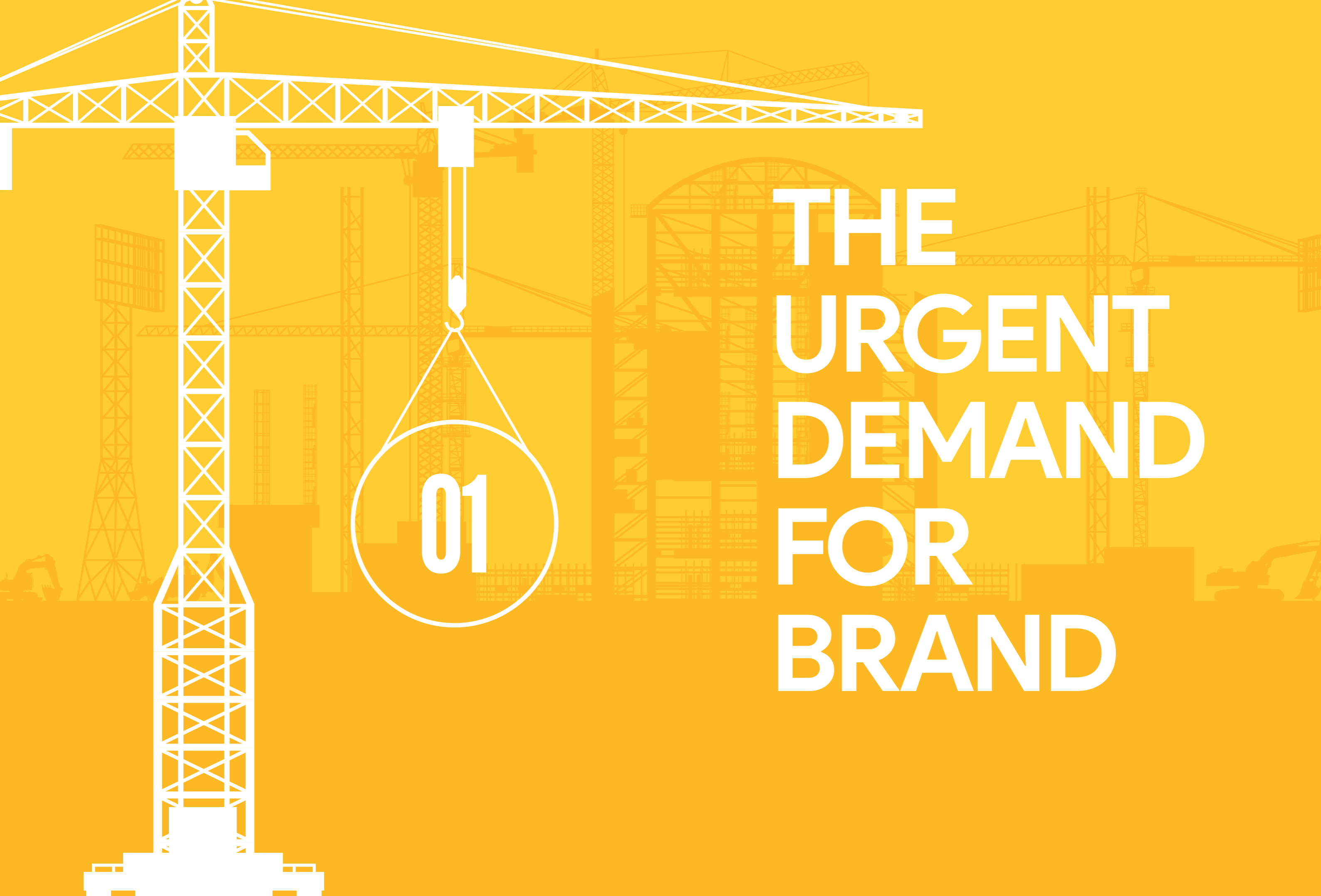
Of course, if you do things well, you have to talk about them well, too. In the past five years, China’s communication skills with the world, and its ability to “tell the stories of China”, have also taken great strides.

Advice for new players

I suggest that Chinese businesses with global aspirations consider international brand-building as a process – one that runs in parallel with China’s development and modernization. I advise companies to focus on three key areas:

- 1. Take a comprehensive approach to building a brand.** Consider that Chinese brands don’t just take a product or service overseas, but also their corporate culture and their world view. These attributes offer a powerful and potentially innovative narrative for global consumers.
- 2. Strengthen international brand publicity.** Chinese brands must fulfil their corporate social responsibilities, properly handle relationships with governments, local communities and consumers, and actively integrate themselves into local markets through deep insights based on data-based evidence.
- 3. Develop cross-cultural communication skills.** Localized operations in international markets should be a priority for Chinese companies. And they need to raise their awareness to let local people tackle local challenges and solve local problems. This includes using public relations to ensure that the brand communicates its mission and spirit in a way that resonates locally.

I hope that Chinese brands going global will create strong and positive support for Chinese people, allowing them to achieve their Chinese dream, and become a glittering business card for China itself.



01

THE URGENT DEMAND FOR BRAND

WHY CHINESE BUSINESSES NEED TO INVEST IN BRAND BUILDING - NOW!

Many Chinese companies have proved adept at launching world-leading products and services, and at competitive prices.

But they're quickly discovering that this doesn't always equate with global business success.

Why? Because for consumers faced with a vast range of options, there's a highly complex decision to be made.

Buyers are juggling not just perceptions of quality with price, but also thinking about safety, experience, prestige, innovation and fun.

The importance of each of these factors in any given purchase varies according to business sector a brand is in, and the individual consumer.

Consumers arrive at a decision not just by weighing up all the facts – and then listening to their feelings. They look for shortcuts to a decision, and the most powerful of these is: brand.

What a business says about itself, through what it creates, sells and the way it behaves, forms a package of meaning that in combination amounts to the brand. And the brand becomes a highly powerful trigger of consumer choice.

Valuable investment

Building a brand costs money. Here are three reasons why that money is a true, long-term investment, not an expense:

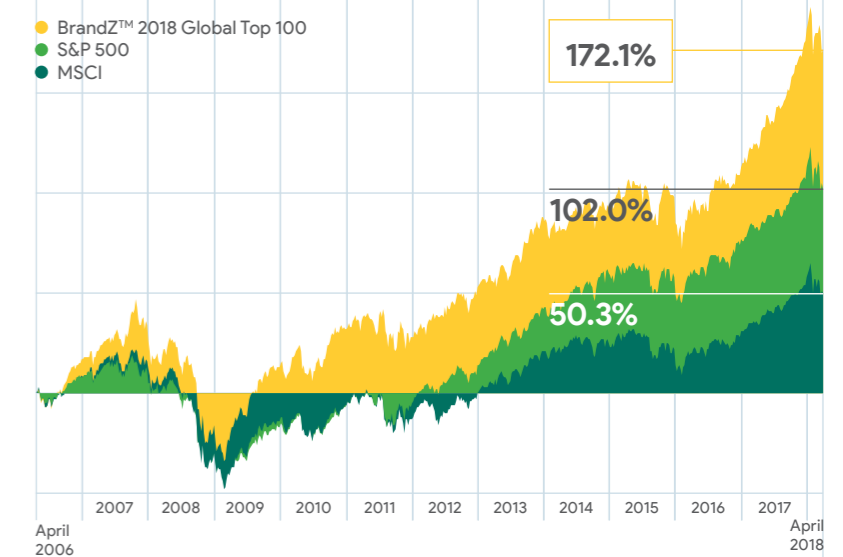
A strong brand provides clarity and guidance for the choices made by consumers, companies, investors and other stakeholders. For consumers, a strong brand is what convinces them to choose one brand over another, or to pay a premium for it.

1 A STRONG BRAND ADDS TO THE BUSINESS BOTTOM LINE

The strongest not only deliver higher returns to shareholders, they sustain a business over the long term and help it recover faster at times when the whole market goes through a period of strain.

The rate of growth of the BrandZ™ Top 100 Most Valuable Global Brands 2006-18 was 172%. Over the same period, the global MSCI Index grew by just 50%. That's a vast gap in the pace of growth – a gap that comes down to brand equity.

% Growth of share price from 2006 to 2018



Source: BrandZ™ / Kantar Millward Brown (including data from Bloomberg)



“

Chinese brands often use their muscle to create awareness when a new product launches. The trouble is you forget it very quickly because they're only talking about a product, not the brand, so they're not building long-term love or loyalty. They're using their financial muscle to buy media space, but not necessarily telling a story that will resonate in the longer term.

Simon Shaw, Chief Creative Officer,
Hill + Knowlton Strategies

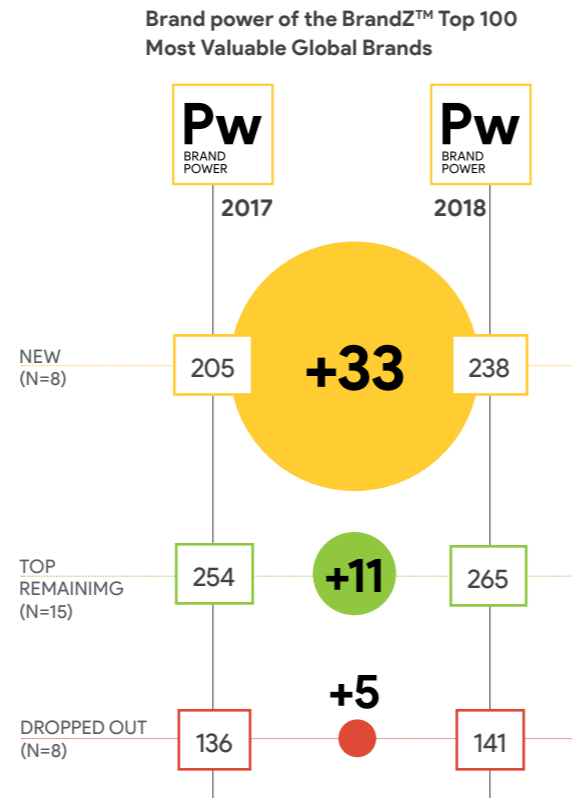
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A STRONG BRAND STANDS OUT FROM THE CROWD

And this is an increasingly crowded and competitive market. Newcomers to the BrandZ™ Top 100 Most Valuable Global Brands had an average Brand Power score in 2017 of 205; just one year later, new brands in the ranking had a score of 238. Over the past 12 years, 49 brands have been knocked out of the BrandZ™ Top 100 Most Valuable Global Brands. They have dropped out not because they have failed to increase their brand power, but because their growth has been much slower than newcomer brands. This reflects the ferocity of competition in the global marketplace.

2

Brand Power Index is a metric of brand equity, the predisposition of consumers to choose a particular brand relative to market competitors.



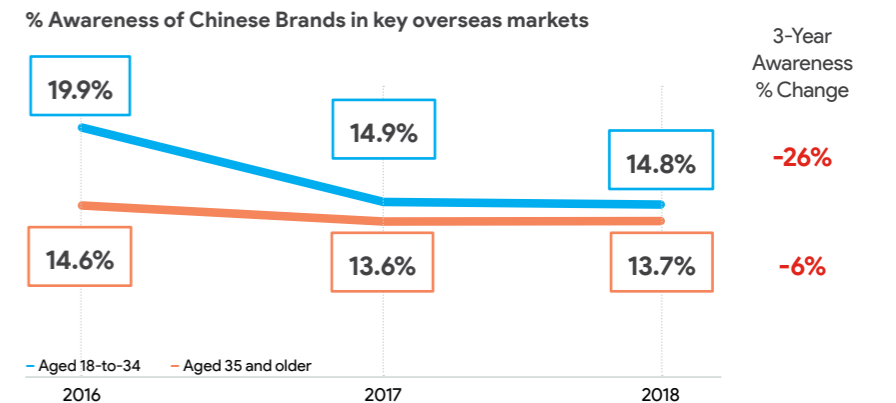
Source: BrandZ™ / Kantar Millward Brown

BRAND AWARENESS IS THE FIRST STEP TOWARDS A SALE

Chinese businesses dealing with fierce international competition for consumer attention face a particular urgency to focus on building their brands now. In the past two years, we have seen global awareness of Chinese brands in decline, both among millennials and consumers aged 35-plus. If consumers don't know you, they won't buy you. It's that simple. Brand building is about much more than establishing awareness, but it has to start there.

3

There has been a 26 percent decline in awareness of selected Chinese brands among global millennial consumers (aged 18-34) over the past three years. Over the same period, awareness has dropped six percent among over 35s.



Source: Google & BrandZ™ Chinese Global Brand Builders / Kantar Millward Brown

Harish Narayanan,
Head of YouTube Advertising, B2B Marketing



EFFECTIVE USE OF DIGITAL VIDEO

The combination of massive global reach, compelling & tailored content, and the momentum that influential YouTubers can give to a brand, makes the platform a powerful partner for brands. We urge all Chinese brands striving for global success to talk to us about how to make YouTube work best for them.



Chinese businesses going global have an urgent need to build their brand, because the data shows that simply standing still in such a competitive market means allowing rival brands to take the lead.

is 35 percent faster than Chinese brands outside the ranking.

YouTube is a platform that reaches 2 billion monthly users worldwide; every day, 1 billion hours of YouTube are watched. YouTube gives brands the power to create and share visually compelling content designed to generate an emotional connection with a target audience.

Our analysis for this project shows there is a positive correlation between having a strong digital presence, and retaining a place in the Top Chinese Global Brand Builders ranking.

These 25 brands are also growing their presence on YouTube; their search index on the platform is increasing at 16 percent - a rate that's 40 percent faster than brands outside the ranking. These findings show that the strongest Chinese Global Brand Builders are using digital communications, and YouTube specifically, to extend their lead over other brands.

But the extra layer of value from online video comes from the two-way nature of the online conversation, and the fact that it has given rise to online influencers - YouTubers who are trusted advisors to the consumers who watch them. The shared passion of YouTubers and their audiences also means that the audience is highly engaged - and hence more likely to engage with a brand's message, than on other platforms.

When we look specifically at the 25 brands that have been in the ranking for three years, we see their search index has grown steadily, at 14 percent. The pace of their growth

The use of YouTube as a platform on which to tell a powerful story is one way brands are establishing not just visibility among consumers, but also differentiating themselves from the competition.

Chinese brands are the most sophisticated in their use of direct-response advertising.

When it comes to brand storytelling, there are some great examples from Chinese brands, but when I look at advertising across Asia Pacific, there is a clear opportunity for more Chinese companies to adopt brand building as a competitive advantage. At the same time, my experience is that when Chinese brands discover what's possible, the learning curve is very steep, and they accumulate expertise very quickly.

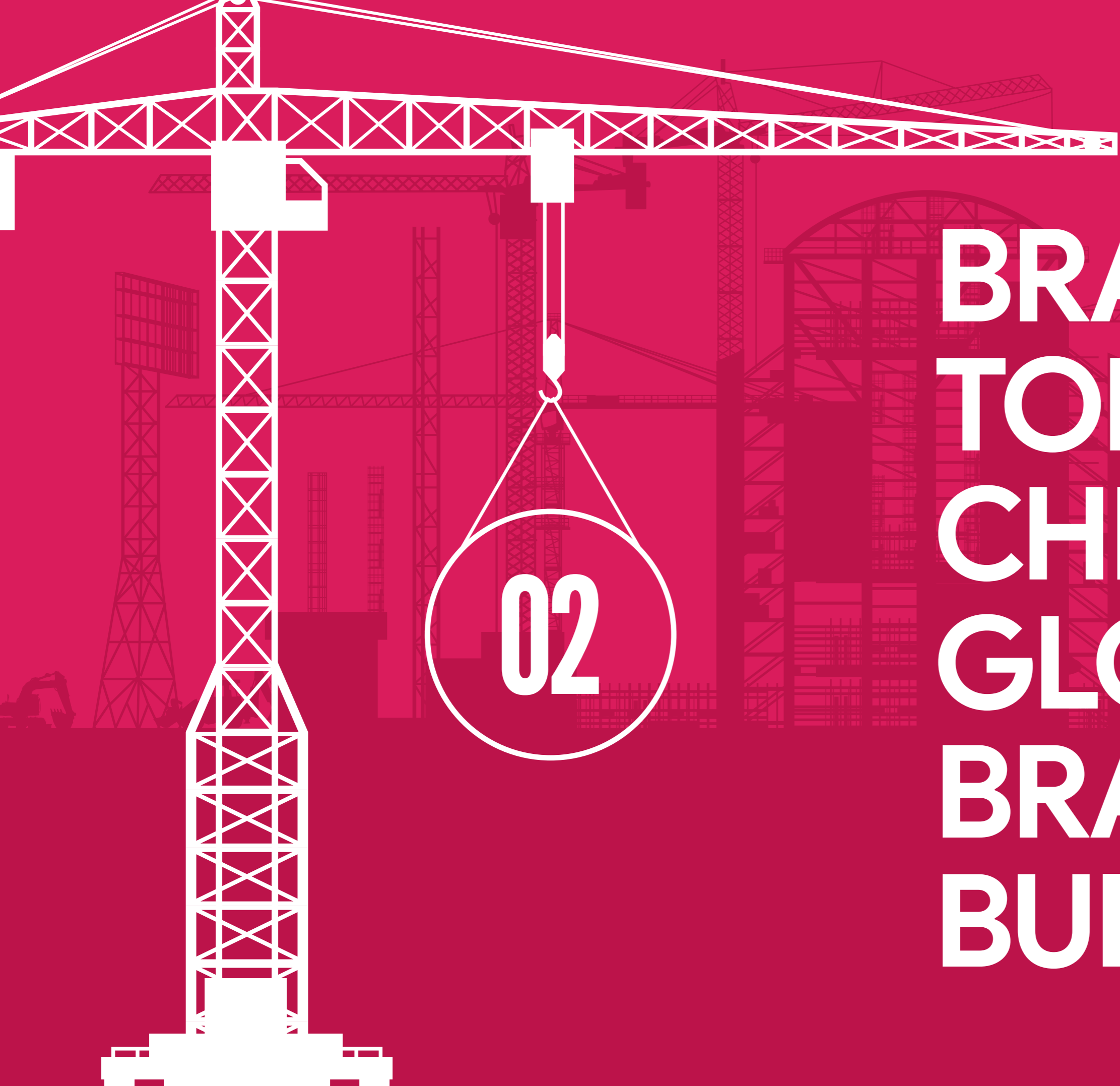


3-YEAR GROWTH OF SEARCH INDEX

25 Chinese Global Brand Builders in the ranking for 3 years



Source: Google & YouTube Search Index & BRANDZ™ Chinese Global Brand Builders/ Kantar Millward Brown



BRANDZ™
TOP 50
CHINESE
GLOBAL
BRAND
BUILDERS

02

BRANDZ™ TOP 50 CHINESE GLOBAL

	BRAND	CATEGORY	BRAND POWER	BRAND POWER % Change 2019 vs. 2018
1	HUAWEI	Consumer Electronics	1,862	+22%
2	Lenovo	Consumer Electronics	1,698	0%
3	Alibaba Group 阿里巴巴集团	E-commerce	1,624	+48%
4	Xiaomi	Consumer Electronics	1,068	+41%
5	ByteDance	Content Apps	878	NEW
6	Hisense	Home Appliances	823	+55%
7	Haier	Home Appliances	776	+34%
8	AIR CHINA 中国国际航空公司	Airlines	731	0%
9	OnePlus	Consumer Electronics	644	+38%
10	ANKER	Consumer Electronics	604	-1%
11	FUNPLUS	Mobile Gaming	577	+49%
12	中國銀行 BANK OF CHINA	Banks	523	+17%
13	DJI	Smart Devices	496	-2%
14	SHEIN	Online Fast Fashion	469	+66%
15	中國東方航空 CHINA EASTERN	Airlines	450	+5%
16	IGG IGOT GAMES	Mobile Gaming	416	+4%
17	TCL	Home Appliances	401	+5%
18	ECOVACS ROBOTICS	Smart Devices	343	+75%
19	oppo	Consumer Electronics	343	+33%
20	Tencent 腾讯	Mobile Gaming	338	+54%
21	zenjoy	Mobile Gaming	324	NEW
22	tap4fun	Mobile Gaming	296	+7%
23	ZAFUL	Online Fast Fashion	291	+43%
24	GEARBEST	E-commerce	273	-6%
25	中国南方航空 CHINA SOUTHERN AIRLINES	Airlines	268	+12%

BRAND BUILDERS 2019

	BRAND	CATEGORY	BRAND POWER	BRAND POWER % Change 2019 vs. 2018
26	中国石油 PetroChina	Oil & Gas	263	+7%
27	vivo	Consumer Electronics	259	+6%
28	HONOR	Consumer Electronics	258	NEW
29	GREE 格力	Home Appliances	249	+89%
30	ZTE 中兴	Consumer Electronics	248	-40%
31	中国石化 SINOPEC	Oil & Gas	246	-16%
32	網易 NETEASE	Mobile Gaming	241	NEW
33	UnionPay International	Payment Networks	235	+40%
34	BIGO	Content Apps	233	NEW
35	elex	Mobile Gaming	229	-68%
36	MEIZU	Consumer Electronics	219	NEW
37	Fotoable	Mobile Gaming	218	NEW
38	ninebot	Smart Devices	198	+25%
39	CHERY	Cars	182	+4%
40	JD.COM	E-commerce	182	+31%
41	ICBC 中国工商银行	Banks	172	+18%
42	吉利汽车 GEELY AUTO	Cars	157	+10%
43	AUKEY	Consumer Electronics	157	+36%
44	BYD	Cars	153	+11%
45	Lightinthebox.com	E-commerce	151	-21%
46	HAVAL	Cars	150	N/A
47	DURAPLUM	Mobile Gaming	150	-28%
48	IM30	Long Tech Network Mobile Gaming	143	-39%
49	Midea	Home Appliances	121	+7%
50	海南航空 HAINAN AIRLINES	Airlines	121	-16%

Brand Summaries

Huawei

01

Company **Huawei Technologies Company, Ltd.**Year Formed **1987**Headquarters **Shenzhen**

Huawei is a leading global provider of information and communications technology (ICT), infrastructure and smart devices. Huawei Consumer Business Group covers smartphones, PCs and tablets, wearables, mobile broadband devices, family devices and device cloud services, and is the third-largest smartphone manufacturer in the world. In the first half of 2018, sales of Huawei wearables rose 147 percent year-on-year. As of June 30, 2018, Huawei operates over 53,000 Huawei stores and 3,500 Huawei Experience Stores globally.

Lenovo

02

Company **Lenovo Group Ltd.**Year Formed **1984**Headquarters **Beijing**

Lenovo is a US \$45 billion Fortune Global 500 company, operating in more than 160 countries. It manufactures a wide range of products, including smartphones, tablets, PCs and workstations, as well as augmented reality and virtual reality devices, smart home and office solutions, and data center solutions. In Q2 of FY2018/19, Lenovo's revenue was up 14 percent to US \$13.4 billion, the highest level of quarterly revenue in nearly four years; and the third consecutive quarter of double-digit YOY growth.

Alibaba

03

Company **Alibaba Group Holdings Ltd.**Year Formed **1999**Headquarters **Hangzhou**

Alibaba Group's mission is to make it easy to do business anywhere. In the quarter ended September 30, 2018, the company reported revenue of RMB85,148 million (US \$12,398 million), an increase of 54 percent year-over-year. Revenue from the group's international commerce retail business reached RMB4,464 million (US \$650 million) in the quarter ended September 30, 2018, representing 55 percent year-on-year growth. During the 2018 11/11 Global Shopping Festival, total GMV settled through Alipay reached RMB213.5 billion (US \$30.8 billion), up 27 percent on 2017 sales, with transactions in 230 countries and regions.

Xiaomi

04

Company **Xiaomi Technology Co. Ltd.**Year Formed **2010**Headquarters **Beijing**

Xiaomi is a brand of smart phones and other mobile devices, along with a range of appliances and consumer electronic products and accessories. With more than 61 million handsets sold in 2014, and products launched in Taiwan, Hong Kong, Singapore, Malaysia, the Philippines, India, Indonesia and Brazil, Xiaomi is expanding its footprint across the world to become a global brand. Xiaomi is headquartered in Beijing and has offices around Asia-Pacific, and in India and Brazil.

ByteDance

05

Company **Beijing ByteDance Technology Co.,Ltd.**Year Formed **2012**Headquarters **Beijing**

ByteDance is one of the first companies to launch mobile-first products powered by machine learning technology. It has been named by Fast Company as one of the World's 50 Most Innovative Companies for 2018 and one of the Top 10 Most Innovative Companies in China. Alongside the flagship product Toutiao, ByteDance also operates a portfolio of content platforms that enable people to connect with, consume, and create content through artificial intelligence technology, including Xigua Video, Tik Tok, Vigo Video and News Republic.

Hisense

06

Company **Hisense Company, Ltd.**Year Formed **1969**Headquarters **Qingdao**

Hisense is a leading consumer electronics manufacturer and one of the largest TV producers in the world. Hisense products are available in over 130 countries and regions, with production facilities in China, South Africa, the Czech Republic and Mexico, and sales offices across North America, Europe, Australia, the Middle East, and Southeast Asia. Hisense has increased global awareness of its brand through its sponsorship of the 2018 FIFA World Cup.

Haier

07

Company **Haier Group**Year Formed **1984**Headquarters **Qingdao**

In the era of the Internet of Things, Haier has transformed itself from a traditional home appliance manufacturer into an IoT ecosystem. Haier has entered the top 10 chain stores for home appliances in Europe and the USA, and sells in over 100 countries and regions. Haier has established 10 R&D bases, 24 industrial parks, 108 manufacturing plants and 66 trading companies. It has a "three in one" localization strategy – combining design, manufacturing and sales – to provide ongoing support for global brand development.

Air China

08

Company **Air China Ltd.**Year Formed **1988**Headquarters **Beijing**

Air China and its majority-owned subsidiaries own a fleet of 662 aircraft (as of June 30, 2018), comprising mainly Airbus and Boeing models, with an average fleet age of 6.74 years. The company operates 109 international routes and 308 domestic routes, serving 189 destinations in 42 countries/regions (69 were international destinations, four regional destinations and 116 domestic destinations). Through its partnership with Star Alliance, Air China offers services to 1,317 destinations in 193 countries.

Brand Summaries

OnePlus

09

Company **OnePlus Technology Company, Ltd.**Year Formed **2013**Headquarters **Shenzhen**

OnePlus's products are sold in more than 50 countries, and its smartphone sales increased 55 percent between 2016 and 2017. In 2017, revenue doubled to more than \$1.4 billion. OnePlus leads India's premium smartphone segment (with 40 percent share in Q2 2018). The OnePlus community has over 10 million users from 183 countries around the world. OnePlus holds Open Ears events globally, allowing community members to join in person to share insights into making the most of their devices.

Anker

10

Company **Anker Innovations Technology Co., Ltd.**Year Formed **2011**Headquarters **Changsha**

Anker is the global leader in charging technology. This includes wireless charging, car charging, and its best-selling portable and wall chargers. Anker is pioneering Power Delivery technology to charge phones, tablets, and laptops at unprecedented speeds. In 2017, Anker sold over 20 million chargers to Europe, US and Japan. In 2017, the company's revenue increased by 56 percent to 3.9 billion yuan. Nearly half of Anker's revenue comes from the United States, while its sales in China doubled in 2017.

FunPlus

11

Company **FunPlus Technology Company, Ltd.**Year Formed **2010**Headquarters **Beijing**

FunPlus is one of the most significant companies in the gaming industry, with employees from more than 20 countries located in Beijing, Taipei, San Francisco, Singapore and Tokyo. FunPlus owns several studios, and invests in several renowned game developers, including XII Braves, thatgamecompany, Bonfire Studios, Stress Level Zero Studios, and Sirvo Studios. FunPlus has also invested in e-sports groups such as Cloud 9. The brand hosts the annual event IndiePlus, one of the most widely known indie game competitions.

Bank of China

12

Company **Bank of China Ltd.**Year Formed **1912**Headquarters **Beijing**

Bank of China provides a comprehensive range of financial services to customers across the Chinese mainland and across the world. In the first half of 2018, the bank's overseas commercial banking operations achieved a profit before tax of US\$4.907 billion, accounting for 22.07 percent of the group's total profit before tax. As of 30 June 2018, Bank of China had 552 international branches spanning 55 countries and regions across the world.

DJI

13

Company **Shenzhen DJI Technology Co., Ltd.**Year Formed **2006**Headquarters **Shenzhen**

DJI is a Chinese drone manufacturer and the world's leader in creating and marketing unmanned aerial vehicles for consumers. It has grown from a single, small office in 2006 into a global workforce. Its offices can now be found in the United States, Germany, the Netherlands, Japan, South Korea, Beijing, Shanghai, and Hong Kong. DJI commands two-thirds of the US drone market by revenue. Fast Company named DJI One of the World's 50 Most Innovative Companies of 2018.

Sheln

14

Company **Sheln Group Ltd.**Year Formed **2008**Headquarters **Nanjing**

Sheln is an international B2C fast fashion e-commerce platform. The company mainly focuses on women's wear, but also offers men's apparel, children's clothes, accessories, shoes, bags and other fashion items. Sheln now ships to over 230 countries and regions worldwide. It has websites specifically for the United States, Spain, France, Russia, Germany, Italy, Australia and the Middle East, and ships goods there from one of its many international warehouses.

China Eastern Airlines

15

Company **China Eastern Airlines Corporation, Ltd.**Year Formed **1988**Headquarters **Shanghai**

As one of mainland China's three major airlines, China Eastern operates a modern fleet of more than 650 aircraft with an average age of 5.39 years. China Eastern serves nearly 110 million travelers annually and ranks among the world's top seven airlines in terms of passenger numbers. China Eastern's network serves 1,074 destinations across 177 countries.

IGG

16

Company **IGG Inc.**Year Formed **2005**Headquarters **Singapore**

IGG is a renowned developer and publisher of mobile games with a strong global presence and international customer base. The group offers free-to-play mobile games in 21 different languages. These have garnered critical acclaim and won prestigious awards. As at 30 June 2018, the user community of the group consisted of approximately 550 million registered players around the world, with a total MAU (monthly active user) base of over 22 million. Around 47 percent, 27 percent and 22 percent of the group's total revenues were generated from Asia, North America and Europe respectively.

Brand Summaries

TCL

17

Company **TCL Corporation**Year Formed **1981**Headquarters **Huizhou**

TCL produces telephones, TVs, mobile phones, refrigerators, washing machines, air conditioners, small appliances and LCD panels. TCL Corporation currently has 75,000 employees, 23 research institutes and 21 manufacturing bases. It has set up sales offices in over 80 countries and regions, with its business covering more than 160 countries and regions in the world.

Ecovacs

18

Company **Ecovacs Robotics Co., Ltd.**Year Formed **1998**Headquarters **Suzhou**

Since 2006, Ecovacs Robotics has invested in developing more than 20 new robotic products each year. Today, the company holds 345 trademarks and over 1,000 patents in China and overseas. Ecovacs has expanded from its home market in China and established strong sales subsidiaries in Japan, Germany and the US. In 2017, Ecovacs became the APAC market leader in robotic vacuum cleaners. In the highly competitive European market, the company quickly rose to become No. 2 in terms of market share.

OPPO

19

Company **OPPO Mobile Telecommunications Corp., Ltd.**Year Formed **2004**Headquarters **Dongguan**

OPPO positions itself as the selfie expert in the sector, providing excellent selfie experiences to young people around the world. For the last 10 years, OPPO has been focusing on selfie technology breakthroughs. It has come up with innovative selfie beautification techniques, and has driven the selfie trend in the smartphone industry. In 2017, OPPO introduced AI to the front-facing camera on its phones, leading a brand new era in selfie technology.

Tencent

20

Company **Tencent Holdings Ltd.**Year Formed **1998**Headquarters **Shenzhen**

Tencent is an internet-based technology and cultural enterprise. Tencent develops and delivers game-changing products, such as social communication platforms “Weixin/WeChat” and “QQ”, which connect people with services, foster closer relationships and create new business opportunities. From comics, videos, games and animation to music, literature, films and news, Tencent offers an array of digital content and multi-media services, providing entertainment and cultural enrichment to over 1 billion users across the globe. One of its most famous games in international markets is PUBG MOBILE.

Zenjoy

21

Company **Zenjoy Limited**Year Formed **2010**Headquarters **Beijing**

Zenjoy is an internet company focused on social games and mobile applications, with more than 1 billion users worldwide. Its best-known product is MX Player, with a cumulative download total of 400 million, making it one of the highest-rated utility products on Google Play. Its most successful gaming product is the Word Connect series.

Tap4fun

22

Company **Tap4Fun Company, Ltd.**Year Formed **2008**Headquarters **Chengdu**

Tap4fun is a game developer that has strength in independent research, development and operations. Its main focus currently is developing, operating and investing in mobile online games. Tap4fun's best-known game titles include Brutal Age, Invasion, Galaxy Legend, Galaxy Empire, King Empire, and Spartan Wars.

ZAFUL

23

Company **ShenZhen Globalegrow E-Commerce Co., Ltd.**Year Formed **2015**Headquarters **Shenzhen**

ZAFUL is a one-stop online shop for what it describes as exciting and edgy fashion apparel. It offers a select choice of clothing, shoes and accessories. In the first half of 2018, ZAFUL posted significant improvements to its number of registered users and monthly active users, the number of monthly visits, and its 90-day repeat purchase rate.

GearBest

24

Company **Shenzhen Globalegrow E-Commerce Co., Ltd.**Year Formed **2013**Headquarters **Shenzhen**

GearBest is a brand for gadget lovers, by gadget lovers, which says it shares consumers' passion for all kinds of cool tech and the hottest gear. GearBest specializes in consumer electronics, gadgets and men's fashion. Its online catalog is constantly expanding, with new items added regularly.

Brand Summaries

China Southern Airlines

25

Company **China Southern Airlines Company, Ltd.**Year Formed **1995**Headquarters **Guangzhou**

China Southern Airlines operates more than 800 passenger and cargo transport aircraft. It has formed an extensive network, covering all of China and radiating throughout Asia and linking Europe, America, Oceania and Africa. China Southern operates more than 3,000 daily flights to 224 destinations in 40 countries and regions across the world. In June 2018, China Southern Airlines was honored with the 2-Star Flight Safety Diamond Award by the Civil Aviation Administration of China (CAAC).

PetroChina

26

Company **PetroChina Company, Ltd.**Year Formed **1999**Headquarters **Beijing**

PetroChina is China's largest oil and gas producer and distributor, and one of the largest oil companies in the world. It is among the Chinese companies with the highest level of sales revenue. The brand says it is committed to becoming a highly competitive international energy company, and one of the major producers and distributors of petroleum and petrochemical products in the world.

Vivo

27

Company **Vivo Mobile Communications Company, Ltd.**Year Formed **2009**Headquarters **Dongguan**

Vivo develops and manufactures smartphones, smartphone accessories, software, and online services. Vivo has expanded into markets in India and South East Asia. Vivo has over 200 million users and is one of the preferred brands of young people around the world. It has six Research and development centers in China and the US: Beijing, Nanjing, Hangzhou, Dongguan, Shenzhen and San Diego. It also has four Global manufacturing bases: Dongguan, Chongqing, India and Indonesia.

Honor

28

Company **Huawei Technologies Company, Ltd.**Year Formed **1987**Headquarters **Shenzhen**

Honor is a smartphone brand launched by Huawei in 2013. Since the second half of 2017, Honor has been operating as an independent brand in overseas markets. In May 2018, the Honor 10 handset was launched in London, and released simultaneously in five Western European countries (UK, France, Germany, Italy and Spain) on the same day. Honor has also entered several Latin American markets, including Colombia and Mexico.

Gree

29

Company **Gree Electric Appliances Inc. of Zhuhai**Year Formed **1991**Headquarters **Zhuhai**

Gree's business covers residential air conditioners, central air conditioners, intelligent equipment, home appliances, air source water heaters, smartphones, refrigerators and other appliances. The company has 90,000 employees, and has established 14 production bases around the world, 12 of which are located in China, with the other two in Brazil and Pakistan. Gree products have 49,013 technology patents, including 22,715 invention patents. They are sold in more than 160 countries and regions, to more than 300 million users all across the world.

ZTE

30

Company **ZTE Corporation**Year Formed **1985**Headquarters **Shenzhen**

ZTE specializes in telecommunications and information technology. The company has provided products and services to consumers, network carriers, businesses and public-sector customers from over 160 countries around the world. ZTE has established R&D centers in the US, Canada, Sweden, China and beyond. It employs over 30,000 research professionals in the development of next-generation technologies, including 5G, the Internet of Things, Network Functions Virtualization (NFV), Software-Defined Networking (SDN), cloud computing and big data. ZTE has filed applications for more than 72,000 patents, with over 33,000 of them granted.

Sinopec

31

Company **China Petrochemical Corporation (Sinopec Group)**Year Formed **1998**Headquarters **Beijing**

Sinopec is a large petroleum and petrochemical enterprise group. It is the largest oil and petrochemical products supplier and the second-largest oil and gas producer in China, as well as the largest refining company and the second-largest chemical company in the world. Its total number of filling stations places it second in the world. Sinopec was ranked third on Fortune's Global 500 List in 2017.

NetEase

32

Company **NetEase Inc.**Year Formed **1997**Headquarters **Guangzhou**

NetEase is a leading China-based internet technology company that develops and operates some of the most popular online PC and mobile games. It also provides comprehensive internet services including online shopping, online advertising, email, and other services. As of September 30, 2018, NetEase had over 22,000 employees, with offices in Beijing, Shanghai, Hangzhou, Guangzhou, Hong Kong, Seoul, Tokyo, Frankfurt, Milan, San Francisco, and Sydney. Overseas revenue accounts for more than 10 percent of total online games revenue, and Knives Out has consistently ranked among the top five games on Japan's iOS revenue-grossing chart.

Brand Summaries

UnionPay

33

Company **China UnionPay Co., Ltd.**Year Formed **2002**Headquarters **Shanghai**

UnionPay is an association for China's banking card industry. It provides banking card services and a major card scheme in mainland China as well as worldwide. In partnership with more than 2,000 institutions worldwide, outside Mainland China, UnionPay has enabled card acceptance in 171 countries and regions, and issues cards in 50 countries and regions.

Bigo

34

Company **Bigo Technology Pte. Ltd.**Year Formed **2015**Headquarters **Guangzhou**

Bigo says it is dedicated to improving the way people live and communicate. Its products aim to empower people to share their creativity, passion and happiness in life and make the world a better place. The business started with video and voice technology services; today, Bigo's product line covers live-broadcasting, voice-based social media, short video platforms and more. Its products include Bigo Live, Like, Hello, HelloYo, and CubeTV.

Elex

35

Company **Beijing Elex Technology Company, Ltd.**Year Formed **2008**Headquarters **Beijing**

Elex provides interactive entertainment and internet services. It has developed seven products: YAC, 337.com, V9.com, Clash of Kings, Age of Warring Empire, Happy Farm, Battle Alert. Elex has over 50 million players, from North America, Asia, Europe, South America, about 40 countries and regions. Overseas revenue accounts for more than 90 percent of Elex's total.

MEIZU

36

Company **Meizu Telecom Equipment Co., Ltd.**Year Formed **2003**Headquarters **Zhuhai**

Meizu expanded into the smartphone market in 2008. With more than 1,000 employees and 600 retail stores, the company has built a presence throughout many international markets. As of the beginning of 2017, its products sold in nearly 50 countries and regions, including France, Russia, Spain and Italy.

Fotoable

37

Company **Fotoable, Inc.**Year Formed **2011**Headquarters **Beijing**

Fotoable is a leading mobile application developer in China, focusing on the development of mobile image processing and application tools. It has more than 300 products and over 50 partners, with a user base of more than 1 billion from 155 countries. The company's featured products include FotoRus, PIP Camera, InstaMag, and Word Crossy. In March 2018, the number of Word Crossy daily users surpassed 1 million, and it entered the top three best-selling apps in Europe and the US.

Ninebot

38

Company **Ninebot Inc.**Year Formed **2012**Headquarters **Beijing**

Ninebot is an innovative company in the field of intelligent short-distance travel and service-based robots. The company has three key business operating across Asia Pacific, EMEA and the Americas, and has subsidiaries in Beijing, Bedford, Amsterdam, Singapore, Munich, Changzhou and Tianjin. The brand's products are distributed in more than 80 countries and regions around the world.

Chery

39

Company **Chery Automobile Co., Ltd.**Year Formed **1997**Headquarters **Wuhu**

Chery is an automobile manufacturer which exports its products to more than 80 countries and regions. So far, it has sold more than 6 million units, making it the first Chinese passenger automobile brand to achieve this level of sales. Of the 6 million, 1.25 million have been exported. Chery has built 14 production facilities in Wuhu, Dalian, Ordos, Brazil, Iran, Venezuela and Russia.

JD

40

Company **JD.com Inc.**Year Formed **1998**Headquarters **Beijing**

JD.com is one of the leading one-stop e-commerce platforms in China. JD.com offers a vast selection of products, across every major category (including electronics, apparel and home furnishings, FMCG, fresh food, and home appliances). JD's global R&D efforts are headquartered in Silicon Valley, California. The number of active JD.com customer accounts increased to 305.2 million in the 12 months to September 30, 2018 from 266.3 million a year earlier.

Brand Summaries

ICBC

41

ICBC  中国工商银行

Company Industrial & Commercial Bank of China Ltd.

Year Formed 1984

Headquarters Beijing

Industrial and Commercial Bank of China provides a comprehensive range of financial products and services to 6,271 thousand corporate customers and 567 million individual customers. At the end of 2017, the bank operated in 45 countries and regions, and indirectly covered 20 African countries as a shareholder of Standard Bank. Total assets of overseas institutions (including overseas branches, subsidiaries and investments in Standard Bank) of the bank were US\$358.6 billion, an increase of 17 percent since the end of 2016.

Geely

42



Company Zhejiang Geely Holding Group Co., Ltd.

Year Formed 1986

Headquarters Hangzhou

Geely is an automobile manufacturer and as well as producing cars under the Geely brand, it holds a 50 percent stake in the LYNK & CO brand. The company employs more than 29,000 people. Geely vehicles are sold through a network of over 800 dealerships in China and some 450 sales or service outlets in overseas markets. In 2018, Geely Auto Group sold over 1.5 million units, an increase of 20.3 percent since 2017.

Aukey

43

AUKEY

Company Shenzhen Aukey E-Business Co., Ltd.

Year Formed 2005

Headquarters Shenzhen

Aukey produces consumer electronics and mobile tech accessories, from USB-C accessories to smartphone lenses and bluetooth audio products. It is a top-ranked global Amazon seller, and has distribution partners in over 50 countries throughout the Middle East, South East Asia, North and Eastern Europe, and Latin America. By June of 2018, Aukey had sold nearly 600,000 products in over 200 countries and regions.

BYD

44



Company BYD Co., Ltd.

Year Formed 1995

Headquarters Shenzhen

BYD supplies products linked to the electronics, automobile, new energy and rail transit industries. Over 24 years of growth, BYD has established over 30 industrial parks across six continents, and has 240,000 employees. The company is listed on the Hong Kong and Shenzhen stock exchanges, with total revenue and market capitalization each exceeding RMB100 billion.

LightInTheBox

45

Light  thebox.com

Company LightInTheBox Holding Company, Ltd.

Year Formed 2007

Headquarters Beijing

LightInTheBox offers a wide selection of lifestyle products through www.lightinthebox.com, www.miniinthebox.com, and other websites in multiple major languages. LightInTheBox sells products in three core categories: apparel, small accessories and gadgets, and home and garden. LightInTheBox's data-driven business model allows it to offer customized products, such as wedding gowns and evening dresses, at scale, for optimal marketing, merchandising and fulfilment.

Haval

46

HAVAL

Company Great Wall Motor Company, Ltd.

Year Formed 1984

Headquarters Baoding

Haval is one of the automotive brands owned by Great Wall Motors. Haval's SUV has retained the domestic sales title for 11 consecutive years, and is the top-selling SUV brand in China. Since it began operating independently in 2013, Haval SUV has been increasingly involved in key overseas exhibitions, SUV cross-country rallies, and other sports marketing campaigns.

Ourpalm

47



Company Ourpalm Company, Ltd.

Year Formed 2004

Headquarters Beijing

Ourpalm is a government-licensed telecommunications service provider. Primarily focused on the development, publication and operation of smart mobile and social web games, Ourpalm has around 2,000 staff and has experience in game development and publishing over 200 titles. Having expanded its portfolio through mergers and acquisitions, Ourpalm's mobile and web games cover popular game genres including Trading Card Game (TCG), Hardcore Action Role-Playing Game (ARPG), Casual, Racing, First-Person Shooter Game (FPS), Sports Game (SPG), and Simulation Game + Tower Defense (SLG+TD).

Long Tech Network

48



Company IM30 Technology Limited

Year Formed 2015

Headquarters Beijing

Long Tech Network, also known as IM30.NET, is a developer and publisher of mobile and online games. The name im30 comes from a Chinese saying, "San Shi Er Li", meaning "When I am 30, I am mature". im30 was founded by a team of 30-somethings who wanted to use their tech experience to create a company that was independent and built to last. One of the brand's featured games is Last Empire: War Z.

Brand Summaries

Midea

49



Company **Midea Group**

Year Formed **1968**

Headquarters **Shunde**

Midea Group is a technology group specializing in consumer appliances, Heating, Ventilation and Air Conditioning (HVAC) systems, robotics and industrial automation systems, and smart supply chains (logistics). Midea has established a global platform of more than 200 subsidiaries, has over 60 overseas branches and 12 strategic business units, and is the majority shareholder of KUKA (with a 95 percent stake). KUKA is a manufacturer of industrial robots and solutions for factory automation.

36

Hainan Airlines

50



Company **Hainan Airlines Co., Ltd.**

Year Formed **1993**

Headquarters **Haikou**

Since its launch in 1993, Hainan Airlines has had 25 years of safe operations, equivalent to more than six million hours of flying. Hainan Airlines and its holding subsidiaries' extensive network of routes covers China, Asia and extends to Europe, North America and the South Pacific. The airline operates 1,700 domestic and international routes to over 220 cities worldwide.



37



**BRANDZ™
TOP 50
ANALYSIS
AND
INSIGHTS**

03

Our third annual ranking of the BrandZ™ Top Chinese Global Brand Builders shows just how rapidly the global marketplace is evolving - and how the winds of change are helping determine the fortunes of Chinese brands.

40 The rise in Brand Power scores for those brands that made the cut this year reflect an increasingly cut-throat market; one that presents Chinese brands with significant growth opportunities as well as unprecedented levels of competition.

How well Chinese brands fare in this environment depends to some extent on how overseas consumers view Brand China, but is largely in their own hands.

In the ranking chart in Chapter 2, it was clear that brands don't just ride a wave of growth in their own category - the best strongly outperform their sector. In this chapter, we show how that can be done.

5 Top Takeaways

- 1 Chinese brands are getting stronger – Brand Power is growing at a faster rate each year across multiple categories.
- 2 Brands from a diverse range of sectors are successfully going global – 12 categories feature in this year's ranking.
- 3 Online Fast Fashion leads growth in Brand Power this year, with a 57 percent increase over 2018.
- 4 New markets are emerging as hubs of growth for Chinese brands; Japan, France and Spain lead the way.
- 5 To supercharge Brand Power, brands need to show how they clearly differ from the competition, and become more salient, so they spring easily to mind.



Most of the brands taking a first step outside China have a very sales-driven approach. It's a very natural thing to do; Western companies have done it the same way. When you enter a new market you first think about how you get distribution, the right retail set-up, the right people in those market. Often the second step is to think about brand, and that usually happens when you reach a certain scale. It's evolution.

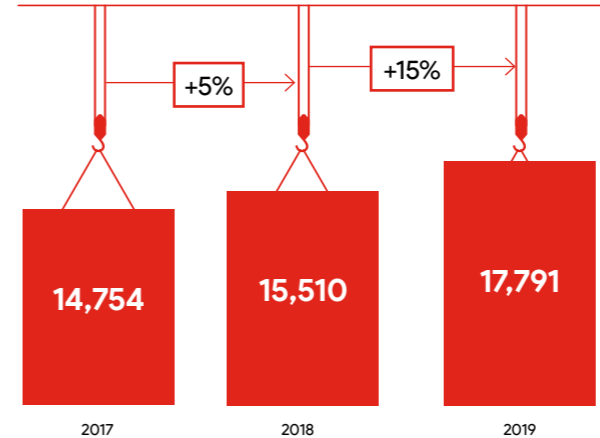
Chris Reitermann, Chief Executive, Asia & Greater China, Ogilvy



1 THE STRONG ARE GETTING STRONGER

The brand-building efforts of some of China's biggest and best-known brands are behind a growth rate in Brand Power this year of 15 percent – showing strong momentum following five percent growth in the previous year. These figures are based on comparison of the Top 30 brands each year, to be consistent over time.

Top 30 Brand Power Year-on-year Growth



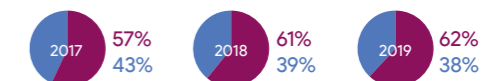
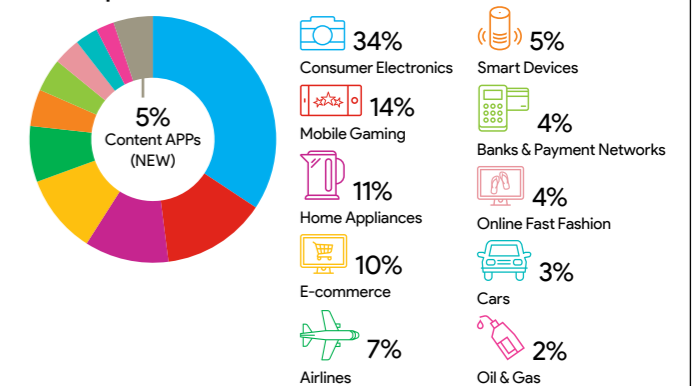
Source: Google & BrandZ™ Chinese Global Brand Builders / Kantar Millward Brown

2 DIVERSE BRANDS MAKE THEIR MARK

The Top 50 ranking this year covers 12 categories, reflecting the breadth of business sectors in which Chinese brands are going overseas. Content apps are new to the mix in 2019. Consumer electronics and mobile gaming together account for almost half the Brand Power of the entire ranking. Home appliances and e-commerce are the next-biggest contributors of Brand Power this year.

While China's e-commerce and online gaming brands are strong, it's actually more established product and service categories – such as electronics, airlines and banking – that are growing as a proportion of the ranking. These “analog” brands now comprise 62 percent of Brand Power in the Top 50, up from 61 percent last year and 57 percent in 2017.

2019 Top 50 Distribution of Brand Power



Established categories vs. internet-driven categories

Source: Google & BrandZ™ Chinese Global Brand Builders / Kantar Millward Brown

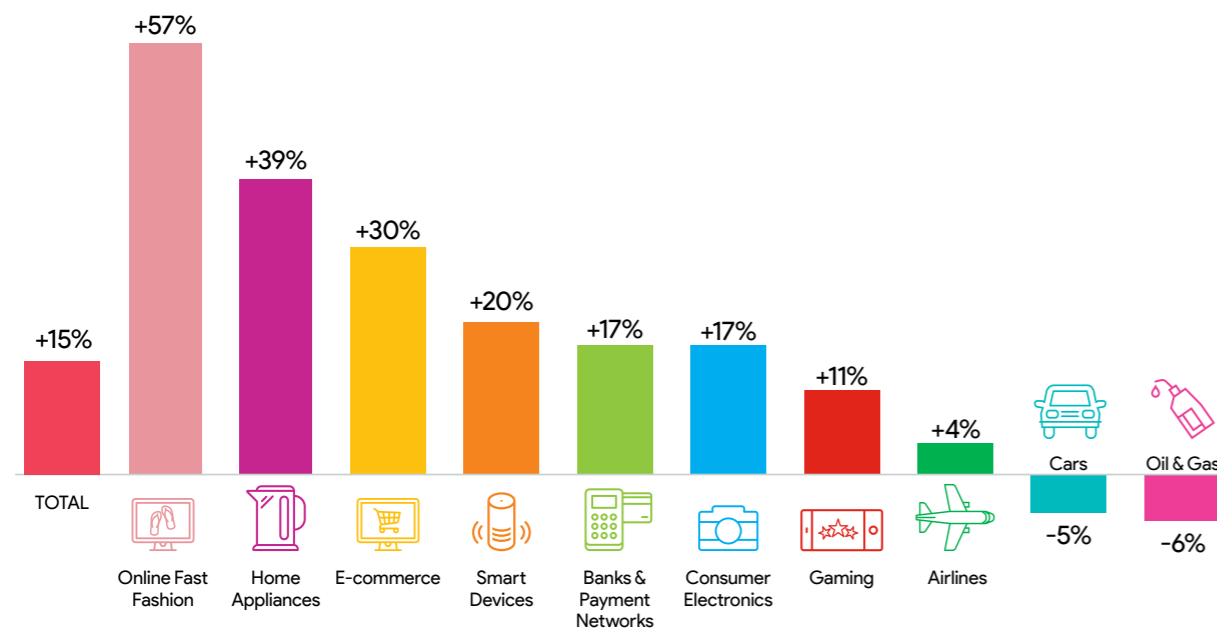
3 BUMPER YEAR FOR ONLINE FAST FASHION

The world of fashion is intensely and increasingly competitive, with several strong Chinese brands challenging more established players for a share of the global online market. These brands – led by SheIn and ZAFUL – have fueled growth in the online fast fashion category this year of 57 percent.

In other categories, growth rates of between 4 and 39 percent were seen across eight of the 11 business categories in the ranking (excluding content apps, which are new this year).

In every category posting Brand Power growth, the pace of growth this year by far outstripped the growth rate seen in 2018.

Brand Power growth by category (%)



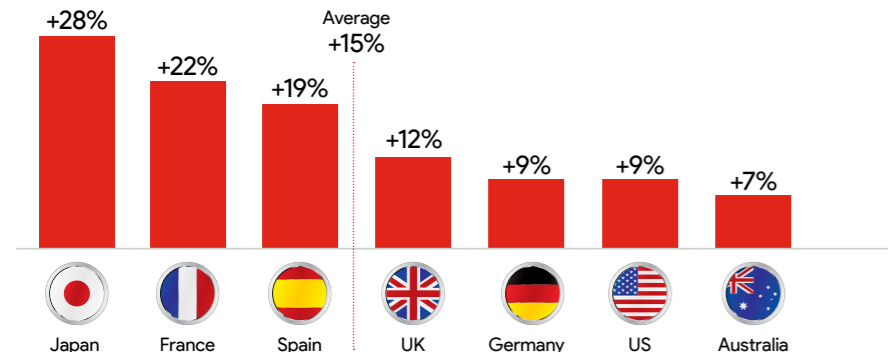
Source: Google & BrandZ™ Chinese Global Brand Builders / Kantar Millward Brown

4 NEW FAST-GROWING MARKETS FOR CHINESE BRANDS

Surges in the power of Chinese brands have been seen in Japan, France and Spain this year, revealing fresh areas of opportunity. A year ago, the fastest-growing markets for Chinese brands were Australia, the UK and the US.

Power levels vary not just by market but also by category. Chinese e-commerce brands are proving especially popular in France and Spain, while in Japan, it's mobile gaming, consumer electronics, appliances, banks and payment networks in most demand.

Brand Power growth by market (%)



Source: Google & BrandZ™ Chinese Global Brand Builders / Kantar Millward Brown

5 SUPERCHARGE BRAND POWER

Brand Power is a combination of three attributes, which each work for the benefit of a brand. Brands should aim to be:

- Meaningful**
Meaningful brands are both appealing and are expected to meet consumers' needs.
- Different**
These brands stand out from the competition in a positive way, setting trends for the category in ways that benefit consumers.
- Salient**
The most salient brands come quickly to mind when a consumer thinks of a category.

When a brand is strong in all three areas, there's a multiplier effect, and the brand is better able to appeal to relevant customers – and potential customers.

The balance of influence of these three elements of Brand Power varies by category and changes over time.

For instance, in consumer electronics, it is becoming increasingly important to focus on Salience as the competition heats up. The best-known and most engaging brands are the ones that will become the default option when there are so many to choose from.

In online fast fashion, meanwhile, Difference is emerging as a growing driver of Brand Power. There are many quite new brands in this category now, and to be competitive, they need to have clear and unique positioning.

Overall, Chinese global brand builders are outstanding when it comes to being Meaningful; the leading Global Brand Builders have been achieving higher scores each year on this measure, growing from 112 to 128 in the past two years.

The rate of improvement on being Different and Salient has been slower. Salience levels actually fell slightly this year after a rise in 2018.

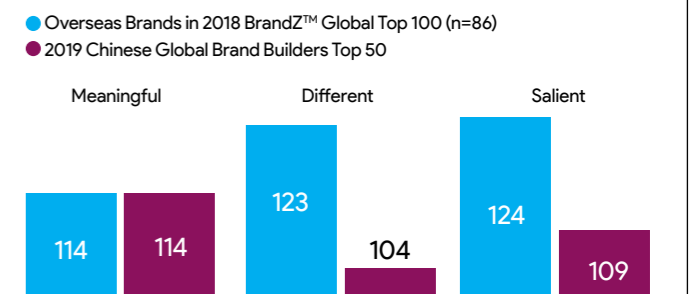
“SheIn stands out because they have a value proposition and are strengthening their presence on key mainstream platforms. They use local insights, and really understand what's driving people to click on their ads and how long they're spending on their web site. They really understand trends.”

Jackson Ng, Global Client Strategy Director, Hill + Knowlton Strategies

Chinese brands going global must be much clearer about what makes them different – and build up brand recognition – if they are to compete successfully against strong global brands.

PLEASE MIND THE GAP

MDS | Chinese Global Brand Builders vs. Global Top 100



The average score of all brands on each of these measures is 100

Source: Google & BrandZ™ Chinese Global Brand Builders / Kantar Millward Brown



The strengths of Chinese brands are usually that they have product value, product innovation and product ubiquity, the key word there being ‘product’. Chinese brands seem to be driven by sales pragmatism. At some point, they need to turn to ‘purpose’ expressed through brand. What do they stand for and how do they make a difference to your life, as opposed to ‘it’s got great battery life’.

Jackson Ng, Global Client Strategy Director,
Hill + Knowlton Strategies



SPOTLIGHT ON ... NEW ENTRIES

There were seven new entries in the Top 50 this year, from three categories: content apps, mobile gaming, and consumer electronics. Here we feature two of the top performers.

BYTEDANCE surges into the Top 50 with a debut ranking in fifth place. The content app developer sees its mission as building the future of content discovery and creation, powered by AI technology. ByteDance says: “We inform, entertain, and inspire people across language, culture and geography.”

HONOR enters the ranking in 28th position - a sub-brand of Huawei launched less than six years ago. Its mission is to be the technology of choice for fashion-conscious young people, millennials and digital natives. The product range builds in some of the advanced features of Huawei smartphones but at a much lower cost.

The brand has been global almost since day one, launching first in Asia and shortly afterwards in Europe. It’s now available in 70 markets, and communications tend to draw on local talent in each market to underline a globally consistent message about cool creativity. In the UK last year, digital-tech artist became the first contemporary artist to take part in a global “Honor Your Creation” global campaign, focused on a passion for color, creativity and design.



	Content Apps	Consumer Electronics
Ranking	#5	#28
Brand Power	878	258

Source: Google & BrandZ™ Chinese Global Brand Builders / Kantar Millward Brown



Often the thinking is: the product’s good, the distribution is good, everything will be good. What we’re trying to promote is the investment in branding as well – they’re not mutually exclusive. Using measurement to prove branding can drive results. It’s an investment, not spend. Of course we need to prove results, but the measurements might not be the same short-term metrics. It’s over a longer period and a bigger win.

Ben Wong, Chief Marketing Officer,
Google Greater China





04

DEEP DIVE INTO THREE KEY SECTORS

HOW CHINESE MOBILE GAMING, E-COMMERCE AND SMARTPHONE BRANDS ARE FARING GLOBALLY

48

The challenges faced by all Chinese brands seeking a global audience are similar in many ways. There are market forces and competitive sets to be understood, consumer habits and preferences to be explored, and the most effective communications tools utilized in a targeted, creative and locally relevant way.

Yet, the detail of the challenge – and, therefore, the best route to market – does vary quite significantly between different business sectors. This is not just because levels of interest in different products vary between markets and audiences, but also because attitudes towards “Made in China” tend to play a greater or lesser role in consumer decision making, depending on the kind of product or service on offer.

These unique category dynamics all require brands to take a tailored approach to consumers. That’s why this year, Google and BrandZ™ have done a “deep dive” into three hot categories for Chinese brands.

These sectors – mobile gaming, e-commerce and smartphones – have

been selected because they are areas in which there are already several strong and growing Chinese brands expanding internationally.

They are also areas in which our Google and BrandZ™ research, into both consumers’ stated preferences and their actual purchase behavior, reveals untapped areas of opportunity.

We have found that while it’s essential to brand success to be Meaningful, Different and Salient, the emphasis and execution of each needs to be adapted to each sector.

In this chapter, we’ll take each of the three categories one by one, and present specific, data-based recommendations for brands operating in each.



Mobile Gaming

Market wrap

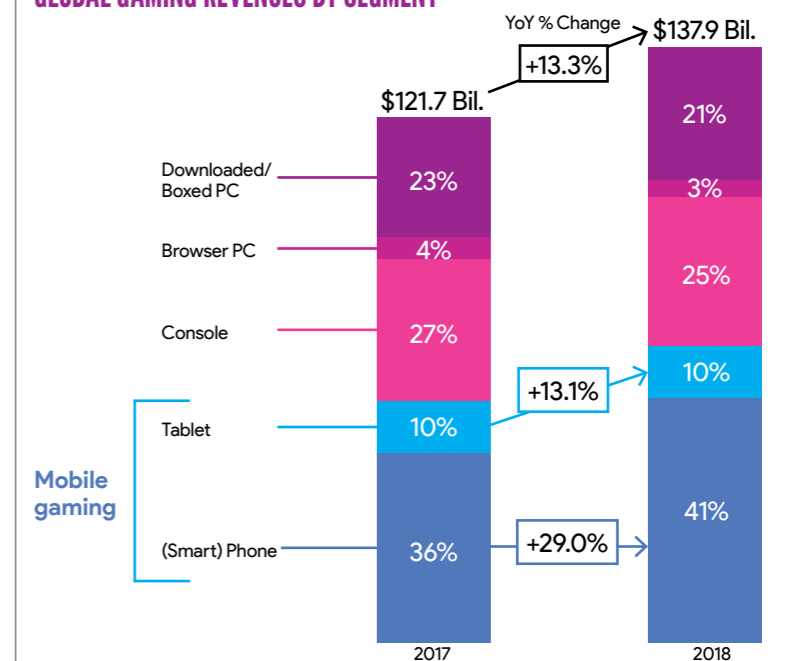
As more of the world’s population gets access to the internet, global gaming is enjoying a surge in consumer interest. In 2018, the gaming industry was worth close to \$138 billion – up 13.3 percent over the previous year.

Hotspots of growth include Asia-Pacific, which is by far the biggest-spending region on gaming, accounting for over half of global revenues. Growth in this region was 16.8 percent last year. The lucrative North American market is growing by 10 percent a year, and Western Europe – the third-largest contributor of revenue – was up by 5.6 percent in 2018. The fastest growth is being seen in the Middle East and Africa (23.6 percent), albeit from a much lower base.

A boom in demand for mobile gaming, via smartphones and tablets, is powering this sector. The value of smartphone gaming alone in 2018 rose by 29 percent (more than double growth for the sector overall).

Mobile gaming now accounts for more than half of all gaming revenue globally.

GLOBAL GAMING REVENUES BY SEGMENT



Source: Newzoo 2018 Global Games Market Report

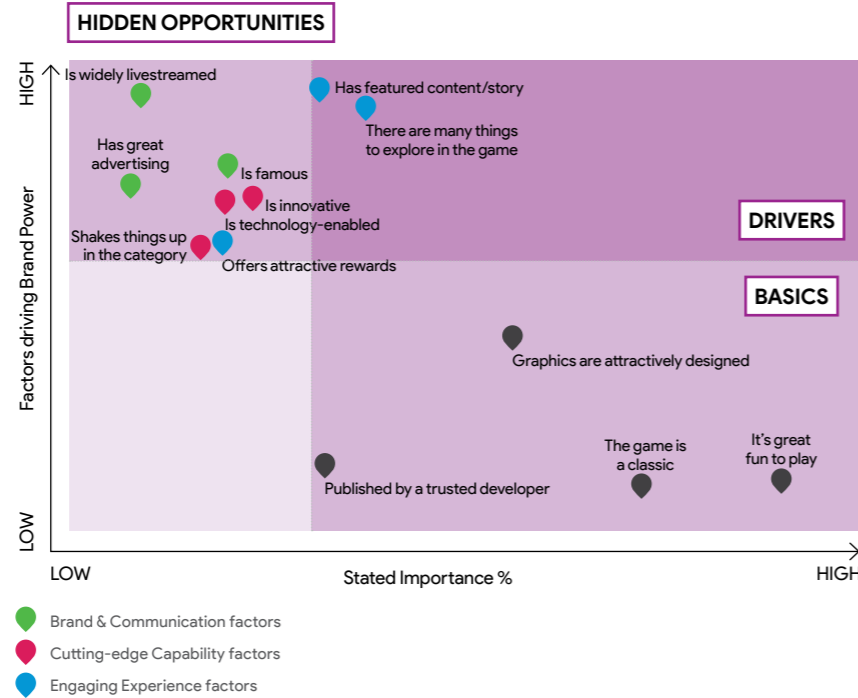
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Action points for growth

Our exclusive Google-BrandZ™ research shows how gaming brands can win with global consumers, step by step.

- 1 Get the basics right**
To have a fighting chance of success, a game has to be fun and have attractive graphics. This is simply expected.
- 2 Go above and beyond**
Consumers say a more engaging experience, with exciting storylines and plenty to explore, helps a game stand out and win fans.
- 3 Explore the hidden opportunity**
Our data shows there are other factors in consumers' decision making that they themselves don't identify as important when questioned, but which clearly make a difference. They include having strong brand communications, and cutting-edge capabilities. Gamers are more likely to spend money on games that are famous, have been live-streamed a lot, and which have great advertising. They are also drawn to the most technologically advanced, innovative games, which create a sense of "shaking up" the sector.

CATEGORY IMPORTANCE MAP



Source: Google & BrandZ™ Chinese Global Brand Builders / Kantar Millward Brown



These games are Chinese owned, designed or originate from China, but Western consumers often don't even know about it. The games appear to adhere to global standards within gaming, and when you download an app, you don't check where it was made. If it works, it works. It's more about the user experience.

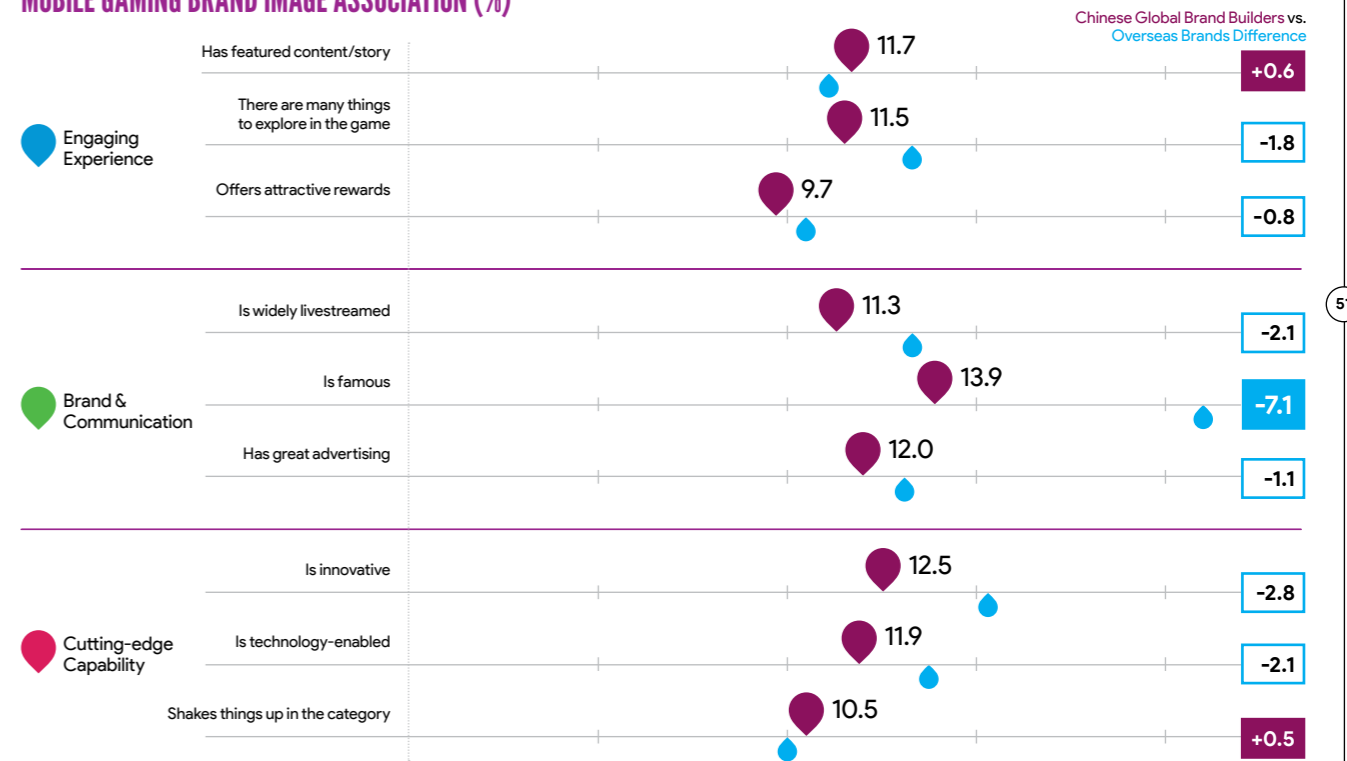
Jackson Ng, Global Client Strategy Director, Hill + Knowlton Strategies



The China factor

Chinese gaming brands compare favorably with international competitors on the quality of their content and the stories they create. They're also seen as highly disruptive. Where they fall down is on the fame factor – they're simply not well-known enough, and that means they need to consider more high-profile advertising and other communications.

MOBILE GAMING BRAND IMAGE ASSOCIATION (%)



Source: Google & BrandZ™ Chinese Global Brand Builders / Kantar Millward Brown

IN SUMMARY...

The global gaming market is booming, especially in Asia, driven by users of mobile devices.

A game must go beyond being fun and offering an exciting in-game story. It must also stand out by innovating and disrupting the sector.

In addition to doing great things, Chinese gaming brands need to shout about what they're doing, to up their fame factor and consumer recognition.



E-COMMERCE

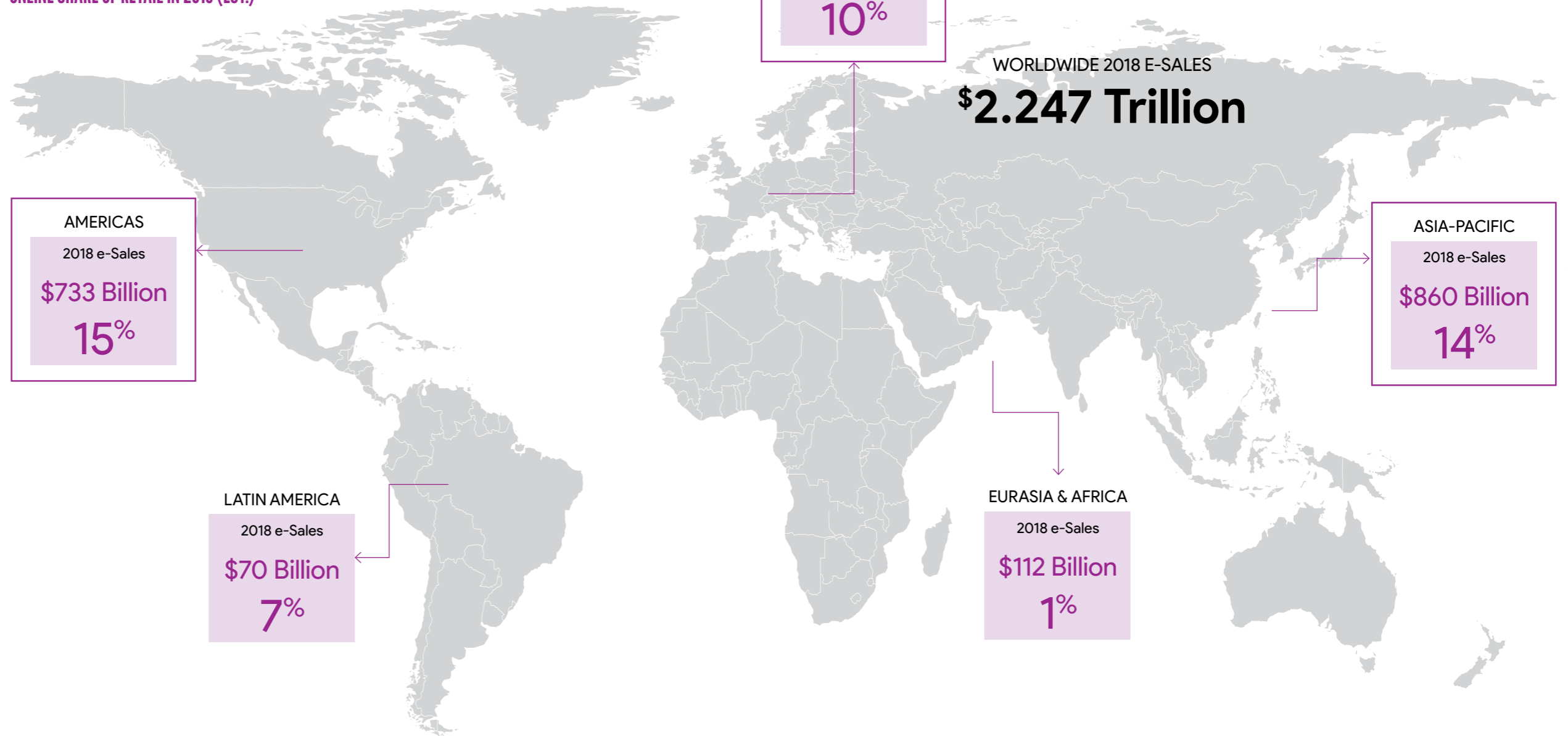
Market wrap

Global retail sales are expected to top \$25 trillion this year, and have been steadily rising all over the world. Growth is forecast to be at least 5.5 percent a year both in 2019 and 2020. Consumers report feeling increasingly willing to spend, even in parts of the world where economic growth is slow.

Online retail is taking a growing slice of the huge retail pie each year; in the Americas, Europe and Asia-Pacific, the proportion of online retail sales is already into double digits.

Worldwide online sales in 2018 generated \$2.247 trillion in revenue.

ONLINE SHARE OF RETAIL IN 2018 (EST.)

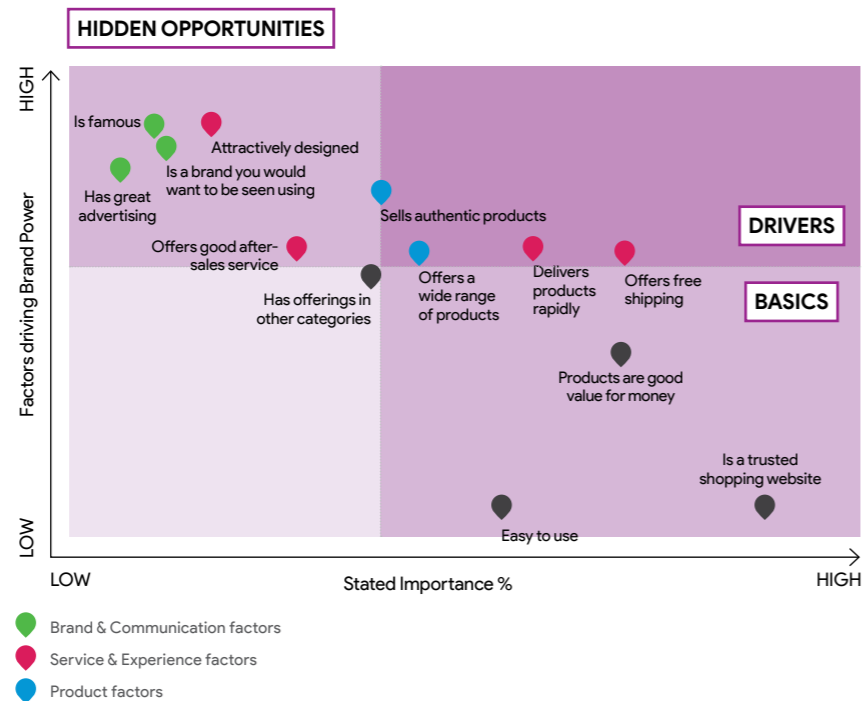


Source: Kantar Consulting

Action points for growth

- 1 Get the basics right**
Ease of use, good value for money and delivering what's been promised are all table stakes in this category, and help earn user trust.
- 2 Go above and beyond**
Outstanding products and delivery services can enhance a brand's competitive edge. Speedy shipping, ideally free of charge, helps set apart a brand from competing e-retailers. Selling a wide selection of products – and ensuring branded goods are the genuine article – can create a further point of difference.

CATEGORY IMPORTANCE MAP



Source: Google & BrandZ™ Chinese Global Brand Builders / Kantar Millward Brown



Tmall's international campaign for Singles Day stands out as very creative, using lots of interactive outdoor in landmark locations around the world for a connected global campaign. Tmall really understood that unlike in China, where they're a completely dominant player, they're going into a lot of overseas markets as a challenger brand.

Mark Heap, CEO Asia-Pacific, MediaCom

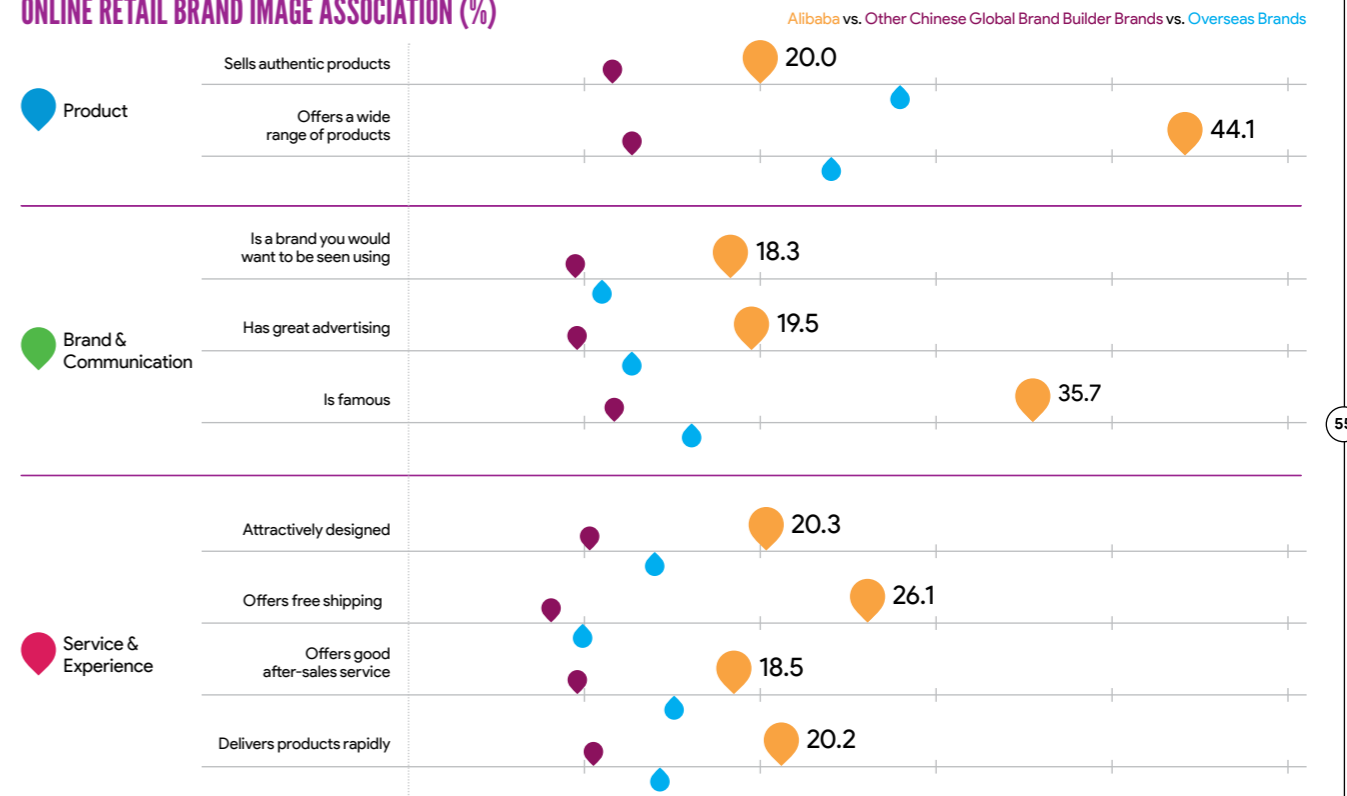


The China factor

The old stereotype about Chinese goods being poor quality persists particularly strongly in this sector, and overcoming it should be a priority for Chinese e-commerce brands, including the leading Chinese e-commerce brand, Alibaba.

That being said, Alibaba is well ahead of other Chinese brands in establishing for itself a reputation for diversity of product offering. In fact, Alibaba outperforms many global e-commerce brands both for the products and services it offers, and the strength of its communications.

ONLINE RETAIL BRAND IMAGE ASSOCIATION (%)



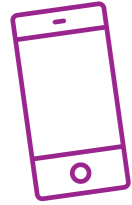
Source: Google & BrandZ™ Chinese Global Brand Builders / Kantar Millward Brown

IN SUMMARY...

Retail is a growth industry worldwide – people just keep on shopping! A rising proportion of total sales is shifting to online, and is already over 10 percent in some markets.

To succeed in online retail, product quality, variety and great delivery options are essential. To stand out takes an appealing website and good after-sales service. The more well-known a sales platform is, with strongly communicated brand stories, the more likely consumers will be drawn to it.

Using brand stories and consumer experiences to build trust will help overcome fears about “Made in China”. Look to Alibaba for how to stand for something more than just a place to shop.



SMARTPHONES

Market wrap

Global demand for smartphones has been in steady decline for over a year – but not because people don't love smartphones. Rather, it's the case that in many mature markets, penetration is at saturation point and the appetite for upgrading has slowed, in part due to economic instability.

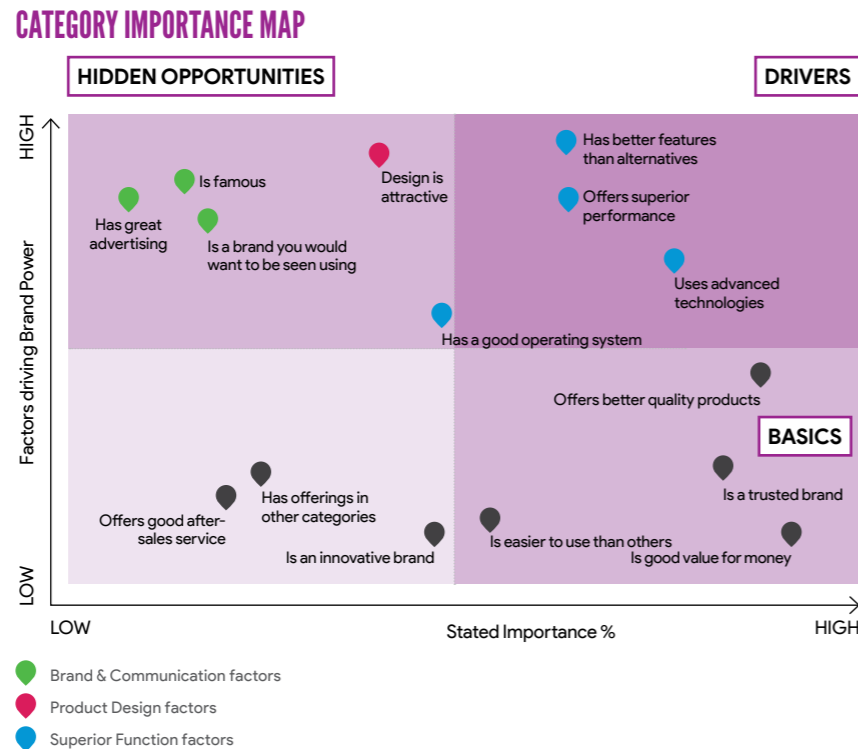
The good news, however, is that when people are buying a smartphone, they're increasingly opting for a Chinese brand. According to IDC (Worldwide Quarterly Mobile Phone Tracker), the big three Chinese smartphone brands are bucking the global trend and are all steadily gaining market share.



Action points for growth

- 1 Get the basics right**
Ease of use, value for money, overall good quality and a trusted brand are considered “hygiene factors” for consumers – they’re a must if a brand is to even be considered.
- 2 Go above and beyond**
After the basics are satisfied, consumers are shopping around for the superior product functions; they say great features and outstanding performance powered by advanced technology help set a brand apart in their minds.

- 3 Explore the hidden opportunity**
What they don’t say, but what we can see in the data has a strong effect on purchasing, is that design and brand communication really matter. Consumers seek out a brand they want to be seen using, and this is linked to fame and great advertising.



Source: Google & BrandZ™ Chinese Global Brand Builders / Kantar Millward Brown



Brands are moving away from highlighting that something’s good value because it’s made in China towards the fact that it’s created in China – a place of innovation, technology and agility – which is probably a much truer reflection of the China I see.

Simon Shaw, Chief Creative Officer, Hill + Knowlton Strategies

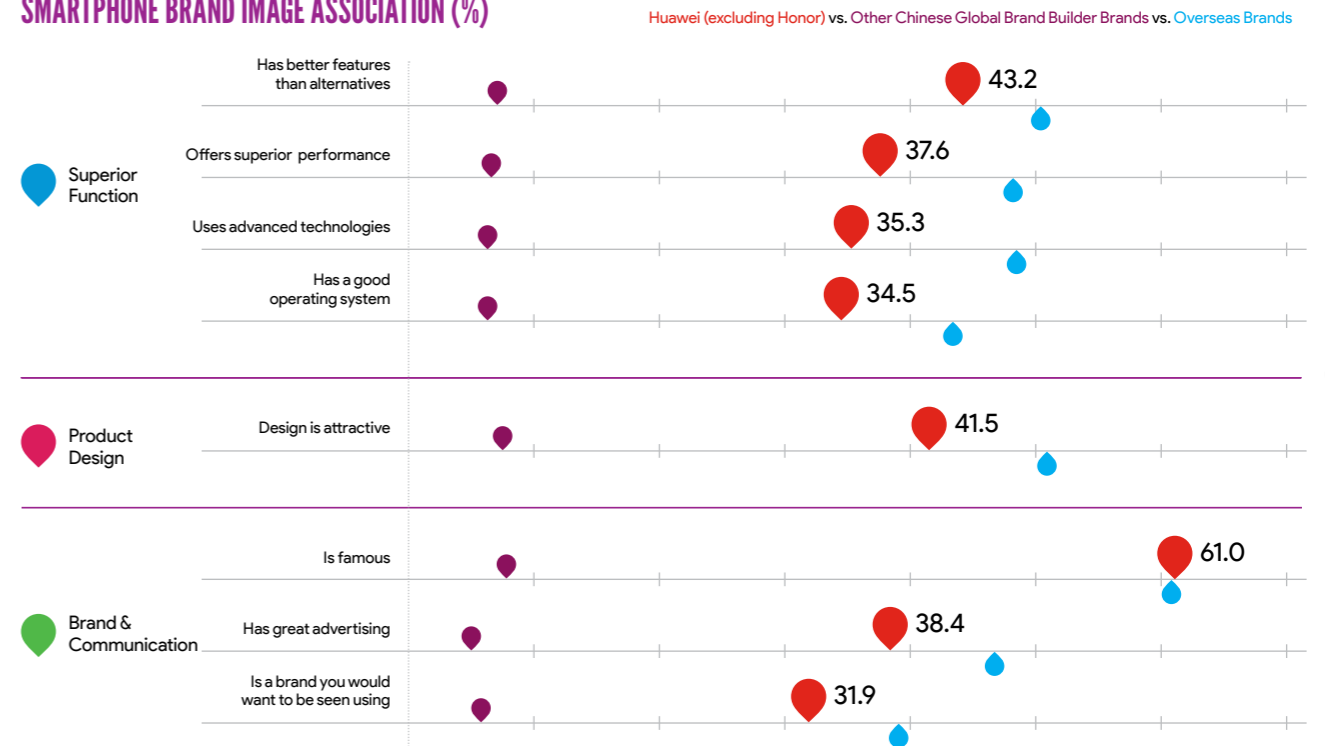


The China factor

Smartphones are a high-value purchase, so consumers need to be reassured about quality and brand reputation. Most Chinese brands lag well behind their international competitors on our consumer survey about product features, design, and communications. But the chart below shows this need not be the case.

This year’s Number One Global Brand Builder, Huawei, shows how Chinese brands can shine. It leads other Chinese brands on a wide spectrum of perceptions around product and brand, and even rivals the global giants. Other smartphone brands need to have a twin focus: fame and building perceptions of quality.

SMARTPHONE BRAND IMAGE ASSOCIATION (%)



Source: Google & BrandZ™ Chinese Global Brand Builders / Kantar Millward Brown

IN SUMMARY...

Demand for smartphones is slowing, but Chinese brands are gaining market share.

Brand differentiation comes via outstanding technological features and performance. Attractive design and a distinctive brand image that reflects well on a smartphone user are other ways to stand out. Communication of all differentiating strengths is essential for growth.

With the exception of Huawei, Chinese brands need to make a big effort to close the gap between how global consumers see them as compared to international brands. Huawei, meanwhile, needs to continue its efforts to promote its product strengths and brand image.



05

**EMERGING
MARKETS,
FRESH
OPPORTUNITIES**

FAST-GROWING MARKETS PRESENT UNIQUE OPPORTUNITIES FOR CHINESE BRANDS

As wealth and digital connectivity both surge upward, consumers are not only more open to making purchases, they're also exploring their options and making their decisions in new ways.

This openness to new ideas tends to bring with it an openness to considering new brands, and here is where smart brands from China can win – if they understand consumer motivations and habits, and tailor their products and communications accordingly.

Using Google search index, Kantar research and other sources, we have identified three hotspots of potential growth for Chinese brands in specific product and service categories, and we offer guidance on how they can best seize these opportunities.

OPPORTUNITY

Automotive in the Middle East

Why here and why now?

The Gulf Cooperation Council (GCC) states of Bahrain, Saudi Arabia, Oman, Qatar and Kuwait are highly urbanized, and their citizens are both highly affluent and highly connected – a powerful combination. Incomes are around triple the global average here, and, in Qatar, the richest of the

Gulf states, GDP per capita is over \$124,000.

Internet penetration is nearly 90 percent, and smartphone usage is soaring. In Saudi Arabia, for instance, smartphone ownership has risen by 50 percent over a five-year period, and the average number of connected devices each consumer owns has grown from two to three.

What you need to know

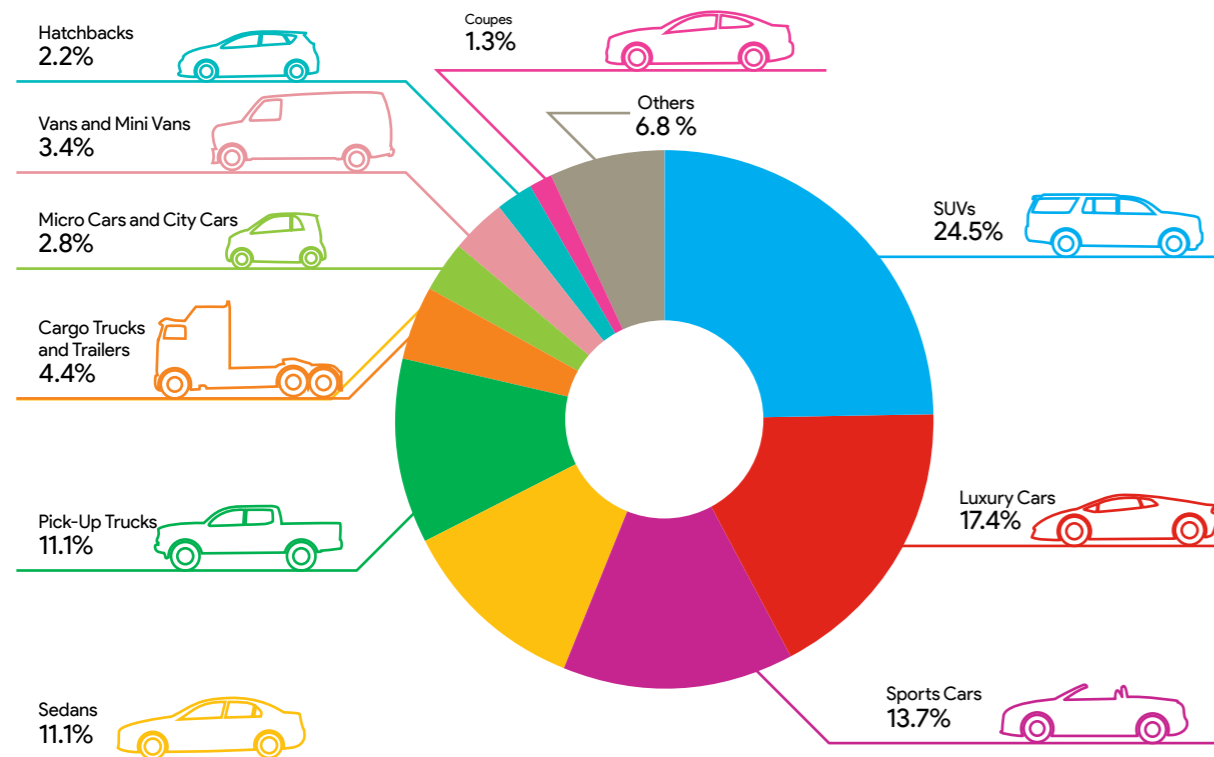
There are no domestic car brands, so buyers have to look internationally. Google search index shows consumers are primarily looking for luxury German cars and in the mid-range are browsing Japanese and US brands. SUVs, luxury

vehicles and sports cars are the most popular model types.

In such an affluent market, price is barely a consideration; buyers' priorities are quality, brand, performance, design and other features.

This is a highly connected market. Take Saudi Arabia as an example: 85 percent of Saudi car buyers say that watching car-related videos online helps them choose, and one-third of those say that watching videos means they're willing to skip a test drive and just buy.

GCC AUTOMOTIVE SEARCH INDEX



Source: Google search index, Q4 2016 – Q3 2018

How to make your move

Automotive brands looking to tap the huge opportunity we see in the GCC countries would do well to focus their energies around the following three data-driven recommendations:

Product

Offer the right models and vehicle sizes to match local buyers' preferences: SUVs, super-luxury, sports cars, sedans, and pick-up trucks.

Positioning

Stand out from the Japanese, US and European alternatives through a focus on brand, quality, design, performance and other buyer priorities.

Marketing priority

Put a digital focus on communications, especially online video.

OPPORTUNITY

E-commerce in India

Why here and why now?

This is a vast market of increasingly affluent, young consumers – almost half the population is aged under 25, and the Indian economy is growing at close to double the global pace (over seven percent in 2018).

Internet connectivity is low by world standards, but it is on a steep growth trajectory. Penetration of internet access has shot up from 17 percent to 35 percent between 2013 and 2017, with smartphone usage tripling in that time thanks to rising incomes and the availability of less expensive handsets.

What you need to know

While e-commerce accounts for just 2.9 percent of total retail sales, the scale of the sector is tremendous; online sales in 2018 alone were worth \$32.7 billion. Growth under way in this sector is seismic.

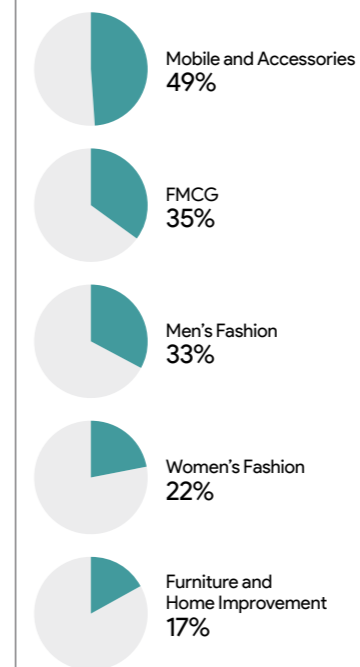
According to eMarketer, the value of e-commerce sales in India is expected to more than double by 2022, to almost \$72 billion a year. Fewer than a quarter of Indians are now shopping online; in four years, that figure will be over 40 percent.

Mobile devices and accessories is the category most often purchased online in India. Of all other categories sold online, FMCG and fashion (for men and women) drive the most shopper traffic.

The autumn festival season is a huge opportunity to capture online sales. Almost a quarter of annual e-commerce revenue is raised in this period. Google search index shows consumer interest typically surges in the two to three weeks ahead of key festivals such as Diwali, and shoppers are looking for festival-specific clothes, shoes and other items. Consumers are seeking to balance price and brand; in India, good value doesn't mean the cheapest deal.

WHAT ARE INDIANS' ONLINE INTERESTS?

Top 5 categories that buyers visit



Source: Kantar IMRB Indian Online Shopping report 2017

How to make your move

E-commerce brands looking to expand into the high-potential Indian market are advised to build their strategy around the following three areas:

Product

Drive traffic with in-demand items such as fashion, FMCG goods, mobile phones and accessories.

Positioning

Highlight the brand strengths not just of available products but of online platforms themselves.

Marketing priority

Plan well ahead for the festival season. Share in the celebratory mood to match the way buyers are searching ahead of festivals. Highlight value and brand strength, and consider celebrity collaborations, which drive particularly high engagement.

OPPORTUNITY

Smartphones in Indonesia

Why here and why now?

Indonesia is the fourth-biggest country by population, it's young (average age: 30), and the level of adoption of smartphone-based internet is world-leading. GDP is growing at over 5 percent – strong by world standards – and this is unlocking disposable income for consumers.

Internet penetration has rocketed from just 29 percent in 2013 to 56 percent in 2017, and the majority of connections are via smartphone. In fact, 91 percent of Google searches in Indonesia are made using a smartphone or tablet.

What you need to know

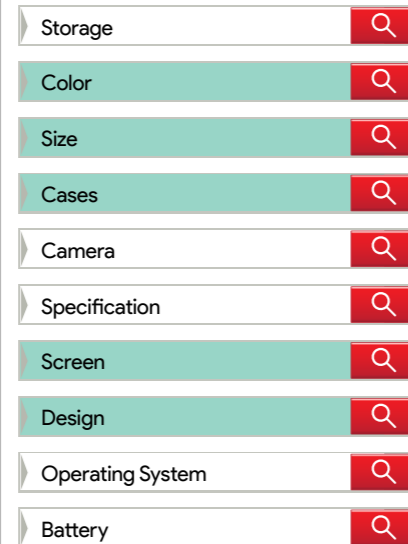
While smartphone sales are in decline globally, in Indonesia, they're still on the rise, up by 14 percent year-on-year in 2018, compared to a worldwide decline of 4 percent over the same period. This reflects the huge numbers of Indonesians who are buying their first smartphone; in many developed markets, growth is stagnant as penetration is universal and the desire to upgrade has waned.

There's another phenomenon at play, too, which provides a second layer of opportunity. The average selling price of handsets has risen 7 percent in a year – in line with growth in consumer spending power. This signals that existing smartphone users are looking

to upgrade, and they're willing to pay a premium for more advanced models and brands. Search index shows buyers are balancing style with function when making a choice:

CONSUMERS ARE CALLING...

Function Style (Look & Feel)



Top 10 smartphone product features for Indonesian buyers (in descending order)

Source: Google search index, 2018

How to make your move

Smartphone brands with plans to enter or expand in Indonesia should bear in mind the following points of guidance:

Product

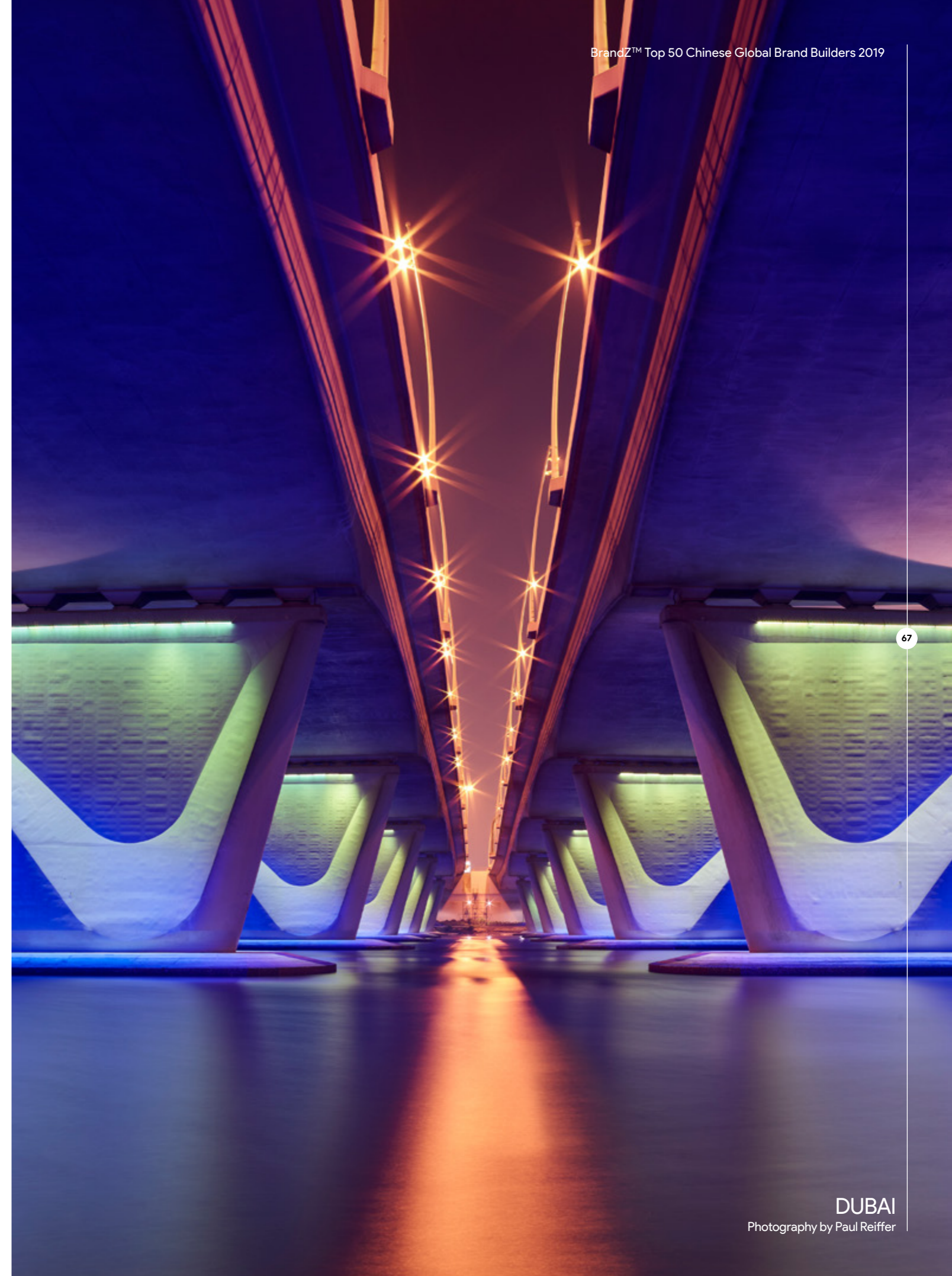
Low prices aren't everything; balance value with the features consumers seek, focusing especially on design and photo-related functions for the premium buyer.

Positioning

Consumers have a vast degree of choice, so brands need to differentiate their positioning. Shifting from entry level to a premium offering is part of this.

Marketing priority

Rising connectivity and the media habits of young Indonesians demand that brands make a commitment to expanding their digital presence. Communicate product innovation and brand superiority.





06

TALKING WITH BRAND BUILDERS

**Leo Wang**

Founder and CEO, ZAFUL

ZAFUL

TAKING THE PLUNGE

From swimsuit specialist to
global fast-fashion brand

If you thought that people who buy swimwear are those planning to hit the beach or head to the pool for a swim, you'd have misread a huge global market.

As ZAFUL, the still-young online fashion brand has discovered, swimming is but a small part of the reason why young consumers around the world are stocking up on swimsuits.

Founder and CEO Leo Wang is keen to stress that ZAFUL is no longer just about swimwear; it aspires to be one of the world's leading online fashion brands. But the business certainly made its initial splash by focusing on this very niche market. Why? Because the data said that's where the global opportunity lay.

“We found that in the swimsuit category, there were performance brands, such as Speedo, but very few fashion brands,” he says.

“Then we analyzed the people who like to buy swimwear, and discovered they buy more because of an attitude than a need to have something to swim in. Some buyers are planning a seaside holiday, but others want a swimsuit to wear at a pool party, where they socialize and take photos of themselves. Google search index showed there was a strong demand, and our own early sales data indicated that this was a growing market for young people.”

The data crunching proved to be invaluable, with sales tripling each year, and penetration growing in key markets including the US, Canada, Australia and the UK, where in 2018 ZAFUL took part in London Fashion Week for the first time.

Wang says the brand’s strategy is to be globally successful first,

and consider the domestic Chinese opportunity later. He says that what works for the rest of the world is likely to be popular in China as well; the reverse isn’t necessarily so. ZAFUL uses almost all Google’s advertising products and has an extensive presence on YouTube, through online KOLs (key opinion leaders) and video ads.

Market Finder helps ZAFUL determine the countries and cities with greatest potential, looking at not just the scale of the youth market, but also the level of e-commerce in each place, the cost of advertising, online conversion rates, consumer spending power and a range of other factors.

This is used in conjunction with Google Trend insights, which highlight brand trends, competitor activity, and the popularity of different styles

and prices by product type. This helps determine the most efficient keywords to use in ZAFUL’s search strategy, and also informs product development.

Google Analytics works with the brand’s own data – everything from traffic statistics, conversion rates and transactional information, to the hobbies and social media usage patterns of its users, and data that indicates how much they’re likely to spend. This leads to smarter, more efficient media investment.

As well as working to build up sales and establish visibility, ZAFUL, which launched in 2014, has also been working to nurture its brand and establish clear points of difference in the minds of its target consumers.

“The mission is to make everyone’s youth more exciting,” says Wang.



The process of building a brand can be a long and painful process, but if you stick to it, ultimately the benefits will come.



At times, he says, that means redirecting marketing budgets away from short-term, sales-driven activities and towards longer-term brand-building efforts.

Check the label

A key challenge for a fashion brand like ZAFUL is to convince international consumers that a “Made in China” label can signal product quality, something Wang says is gradually becoming easier.

“Many users have a bad impression of China’s manufacturing, and they feel it represents something that is cheap or of poor quality. But I believe opinions will change over time. Many Chinese brands, such as Xiaomi, Oppo and Huawei, have done a great job of creating brand awareness and showing there’s no shortage of ability in China.”

To generate the trust required to build loyalty, ZAFUL focuses on

learning how to improve the user experience. “We can’t be perfect in one step,” Wang says. “But this is the direction of our efforts. We have to collect users’ comments on us, identify their needs and understand where we are still not doing enough. Then we will work hard to change.”

Part of improving the service will be a move into physical retail, but in a highly digitized way. “I want to have a global market, not only an online platform,” Wang says. “I certainly want to extend it to offline, but using a new retail model combining online and offline.”

Another way of offering more to ZAFUL users is to extend the product line and make regular new releases. Wang sees this as similar to Apple’s approach of focusing initially on the laptop business to establish a good reputation. Then it moved on to smartphone business to stay ahead of the competition by releasing new categories or updated models.

A new ZAFUL Sport sub-brand has recently launched, to capitalize on the widespread use of active wear as everyday clothing. Menswear is also in the pipeline.

“The next step is to plan to launch or optimize one new competitive category line every year, and do it really well so that our users see us as the brand they need to go to in that category. I don’t want to give people the impression that ZAFUL has a comprehensive selection, but that within each category, it’s not very good.”

This gradual process of building the business, the brand and consumer trust and loyalty in combination will be essential to the future strength of ZAFUL, Wang says.

“I think that the final success of a brand does not depend on how big your market is. I think it’s still what your users think of you. This is the true value and meaning of a brand.”



Dave Wu
Head of International Marketing,
Ecovacs

CLEANING UP

Data insights driving robot development and business expansion

It's not often that a home appliance is seen as a cool gadget, but ECOVACS ROBOTICS sees its role as much more than manufacturing cleaning appliances.

"Innovation is in our DNA, and our mission is to give people a better life via technology," says Dave Wu, Head of ECOVACS International Marketing. "And we see ourselves more like a companion, who can help you take care of your family and your home chores."

Giving the brand an energetic personality is an important part of taking ECOVACS global. It is the leading brand in China and is rapidly expanding in to the rest of the world, led by regional offices in Germany, Hong Kong, Japan, and the US. ECOVACS ROBOTICS' home service robots are the market leaders in both Germany and the US.

“When people talk about vacuum cleaners, the first thing that comes to mind is cleaning and housework, and that’s boring. Even when you’re talking about high-tech vacuum robots, it’s still not that sexy. Telling a story about technology can be very cold,” Wu says. “ECOVACS recognizes this very well, so has been building the brand with its own personality, and developing emotional connections with consumers and becoming like a friend who solves their cleaning problems.”

Data is the core of the business. ECOVACS develops and improves its products based on insights from analysing various types of data, such as how people are interacting with ECOVACS online, how they shop online, online payment information and other online behavior, as well as first-hand data collected via the ECOVACS app.

Data analysis also underpins all marketing activity, so that media strategy and creative development

are highly targeted and adapted to suit consumers and the platforms they’re using. In some markets, it’s even possible to serve someone a mobile ad when their location data indicates they’ve just seen an ECOVACS ad in an elevator.

Wu says ECOVACS is a data-driven company. Its data-driven spirit leads to a highly logical planning process, with every marketing decision supported by data. The importance of data is a priority that ECOVACS promotes to every one of its employees.

Box of tricks

The ECOVACS partnership with Google helps the brand’s expansion in three key ways:

- Google Customer Affinity helps identify and understand ECOVACS’ three main target groups – it calls them “Tech Enthusiasts”, “Time Starved Achievers”, and “Stylish Life-Enjoyers”. It can pinpoint potential customers with incredible accuracy based on their online habits, interests and preferences, so advertising is highly targeted and efficient.

- YouTube is one of the main platforms that ECOVACS uses to interact with its customers. The brand positions itself as an

innovative and intelligent brand, so all content needs to reflect this positioning. However, the media mix and creative development is tailored to different types of consumers. It is also adjusted to suit the goal of each campaign, whether that is to maximize impressions or perhaps interact with key opinion leaders.

For example, for Tech Enthusiasts, the brand focuses on product seeding with tech geeks on YouTube – with unboxing videos or reviews. For Time Starved Achievers, they use a different group of influencers and generate different kinds of content.

- AI and the open-source machine learning software Tensorflow is applied to the brand’s own user data – which includes how frequently and in what ways people actually use ECOVACS products. This informs new product development that better meets consumers’ needs.

In China, ECOVACS sells mainly online, but has an omnichannel approach in other markets. This requires the brand to localize its marketing strategy for each market, and balance its use of different communications channels.

ECOVACS stands out at the physical point of sale – where’s it’s usually stacked alongside more traditional

cleaning appliances – by building an understanding of the brand and products via matrix marketing and establishing an emotional connection with customers.

For the launch of the WINBOT – The window cleaning robot, ECOVACS’ campaign tagline is “The View Is Better Than Ever”, underscoring the emotional benefit rather than the spec of the robot, impressive though it is.

Wu says data will continue to guide the business as it develops further, both in terms of its product range, its global footprint and its routes to market. Google’s Tensorflow open-source machine learning technology, which can be applied to proprietary and third-party data, is part of understanding consumer needs and informing product development.

Seeing the future

This year, ECOVACS will introduce its first Floor Cleaning Robot powered by AI technology. The robot can recognize obstacles that would usually get in the way, and find its around them.

Inspired by advanced digital technologies being deployed in next-generation physical retail stores, ECOVACS plans to open its own high-tech retail stores in selected markets this year.

Revolutionizing the retail experience is one of several goals the brand has for the next five years. The brand also wants to move beyond being the leading home service robotics brand, and become a leading data-driven brand.

ECOVACS plans to launch innovative products, understand more about customers, and optimize how it reaches them. Marketing and sales will work more closely, so as to provide more solutions and innovations to customers through machine learning and cloud data analysis.



We hope to bring our customers a new lifestyle. ECOVACS robots will enable them to save time spent cleaning and do more of what they love.



Kevin Xu
Co-founder and COO, IGG



PLAYING TO WIN

Mobile gaming giant's strategy for global success

To get a sense of just how many people are playing mobile games developed by IGG, imagine the entire population of the US, Germany and Japan combined – and then add most of Australia!

The success of the business is derived almost entirely from just two free-to-play games, Castle Clash, which launched in 2013 and now generates over US\$10 million in monthly billings, and the more recent hit title, Lords Mobile, a strategy game played in over 20 languages by people in 200 countries. Lords Mobile alone generates US\$56 million a month, helping the business to growth of over 40 percent last year.

IGG's user base is truly global: around 47 percent of users are in Asia, 27 percent in North America, and 22 percent in Europe. This split almost exactly mirrors the location of the world's gamers.

Co-founder and COO Kevin Xu says this international balance is deliberate – carefully designed to ensure players can challenge others around the world, without feeling that users from any one market are dominating.

IGG's international presence is the result of intense attention to the demands and nuances of every market they enter, so that the game experience – and the advertising that promotes it – is locally tailored and highly targeted.

“Just doing some localization and translation is not enough,” Xu says.

While IGG's home office is in Singapore, it has a key office in Fuzhou, and there are staff in 19 countries. Research and development for new products is conducted across markets; in fact, Xu says, Lords Mobile was the result of brainstorming by developers in China, Singapore, Japan, the United States, Russia and Canada.

“So, Castle Clash succeeded 90 percent by luck and 10 percent by courage, because everyone involved, from art and development to planning, was Chinese – people who had not been abroad. But Lords Mobile was built by a global team, so its success comes down to 90 percent effort and 10 percent luck.”

The business' focus is so international that on a recent trip back to Fuzhou office, Xu found himself lost. Not surprising, perhaps, when you consider that in the past five years he has spent no more than 48 hours in this office.

Strategy for expansion

Xu says globalization and constant updates to game content are behind IGG's ability to hugely extend the game life cycle. The average lifespan of a mobile game is just a few months; IGG's hit titles are now years old, and still growing.

The company's global reach has been driven by market insights and analysis, in large part achieved through partnership with Google.

Google's International Growth Team and Strategy & Insights Team have worked together for IGG as it's looked to high-potential markets including Indonesia, Japan and Brazil. This has helped IGG more deeply understand local gamers and the market landscape.

The OneGoogle solution uses big data and machine learning to identify prospective paying players and optimize user acquisition. It does this based on a rich “user portrait” based on Android usage habits, gaming preferences,

consumption patterns, and the videos, music and movies people like.

Google has helped develop advertising that links to Android game downloads, and designed PR activity to support offline and online advertising.

No rush

Around half of IGG's marketing budget is spent with Google, but Xu says becoming a global success is not just about driving the greatest possible number of conversions. It's about building a brand.

“There are many companies that want to make a name quickly, so they push their product with a load of advertising,” he says.

“At IGG, we're not in a hurry. We'll build our own brand and will become a century-old store ... gradually.

“So, when we do brand promotion, we're not just eager to achieve quick results as many companies are. Instead, we build our own user groups around the world, and then promote the brand through word of mouth among this group. In this way, we build a very solid user base. People don't just like us, they believe in us, and this is very important.”

IGG's company motto is: “Innovators at Work, Gamers at Heart.” Staff are encouraged to focus on their passion for gaming, and also move with the times.

“In the R&D process, we must keep up with developments and the technology of the times,” Xu says. “And I always remind our developers not to focus on money, but to concentrate on creating player happiness. That is the first priority for us.

“If you make a game fun, the profits will take care of themselves.”

IGG's road to success has not always been smooth, however; Xu says that behind the success of Castle Clash and Lords Mobile lie 20 to 30 games that flopped. “There are two experiences that matter in this business – how to fail and how to succeed. Only when you combine the two do you have a real insight into what works.”

And he has two pieces of advice for other Chinese businesses with global aspirations.

First, don't equate simply taking a product overseas with globalization. “If you want to be a global company,” Xu says, “you really need to devote yourself to a long-term vision.

Second, look at partnerships as a way to make global expansion easier; IGG now offers publishing & financing services to Chinese developers to help them expand internationally. And Xu says that it's essential for Chinese

businesses to make use global of technology platforms such as Google to lower risk and identify where the genuine opportunities lie.

“Because,” he stresses, “you will not succeed alone.”



If you just brainwash people with advertising alone, you make an impressive impact now, but then die, like a gust of wind.



Herman Zhu

CMO, Huawei Consumer
Business Group



CREATING A VISION, PURSUING DREAMS

Why tech success is about so much more than innovation

Talk to any user of the latest Huawei phone about why they bought it, and they'll probably give you a list of great features: the high-spec Leica camera, non-slip case, processing speed and water resistance.

Innovations such as these have been fundamental to the growing success of Huawei globally. The brand is now the second-biggest-selling mobile phone brand in the world, having overtaken the iPhone in 2018 with total sales of more than 200 million handsets in more than 170 countries.

Herman Zhu, CMO of Huawei Consumer Business Group, says there's a relentless focus on quality and cutting-edge technology – and at least 10 percent of annual revenue is invested in product development.

But Zhu says there's caution within the company about what innovation alone can achieve. What's essential, he says, is a pairing of technological advancement with meaningful, emotional consumer connections. In other words: building a brand.

"We've always believed that IT is the most powerful tool for bridging the digital divide, and it's a responsibility we take very seriously. But there's very strong opposition to blind innovation. We are focused on doing each thing well, then the next thing, and we're not afraid of taking on big challenges. But never innovation for its own sake."

Zhu recalls the words of a former colleague, long since retired, who used to note that almost every company in the world says they put the customer first. But Huawei, he said, was the only one that actually lived and breathed that promise.

Turning up the heat

In addition to providing practical reasons to win over consumers, Zhu says Huawei is determined to bring warmth to the relationship.

"We're not just selling cold machines. In all aspects of our interaction with

customers, we make them feel special, and in some ways this reflects the high-quality service of our Asian culture. Singapore Airlines is a great example of an Asian brand with warmth; that's what we're working on."

The Huawei brand, Zhu says, is about being honest and trustworthy, but also about helping people pursue their dreams.

"Different people have different aspirations. For example, yearning for beautiful things, yearning for strength, yearning for intelligence, yearning for a relaxed life or yearning for fun," he says.

"Helping people achieve these things is our driving force; it's not just a few beautiful words we can put on our packaging. We communicate it very strongly internally and we now define the brand as Huawei's core strength.

"Of course, we need our marketing to reflect this, and that's why we say in our communications, "Dream it Possible".

As a brand that sees itself as global rather than Chinese, Zhu says the manifestation of the "dream" message must be tailored to users in different markets.

"Most of our staff are local to the countries they're working in, and they have a deep understanding of the local culture. We don't impose a global message on local markets; instead, we encourage them to react quickly to

local needs, because the world is big and every country has its own story."

Zoom with a view

To convey the night-shooting capabilities of a phone, for instance, an ad might show a beautiful view of Shanghai or Chongqing. "But a beautiful night scene in Kuala Lumpur, or Berlin or London can be created and shared locally, and make a better connection with local consumers. This is precisely the value created by a global mode of operation."

Localization also runs more deeply than switching the location in an advertising image.

In the UK recently, ahead of the Christmas shopping season, Huawei showed how the AI function in the Mate 20 handset could translate spoken words into sign language and vice versa. The emotion-charged film showed a young deaf-mute girl's world being transformed by her new ability to communicate.

And in Germany, another much-shared online ad shows a teenager discovering an unknown creature in a forest. He takes a photo of it with his phone, then the ad fast-forwards through the effects of sudden fame that results from him sharing the picture. It is a subtle and powerful message about the implications of sharing content online, with the tagline: "It's in your hands."

On the path to becoming a global brand, Huawei's partnership with



We firmly believe that communication can enrich people's lives, and the best communication can help break down barriers.



Google has made a significant difference in the following ways:

- The data and insights derived from consumer search behavior have helped identify the most suitable groups of target consumers group for HUAWEI products and services.
- During the development of marketing communication messages and materials, it has been imperative to understand consumers' needs and preferences, which has required in-depth analysis based on behavioral data.
- Effective media investment and targeting has required

up-to-date information on media consumption trends, and frequent consumer feedback on our ongoing efforts.

One brand strength that needs unique shaping for every market is what Zhu describes as "strategic patience".

In markets where the brand is little known or understood, Huawei has been investing in outreach programs for large retail stores and enterprise partners – and in immersing end consumers in the brand.

In Hanoi and Ho Chi Minh City, for instance, Huawei stores have recently opened with a focus on promoting

understanding of what Huawei represents – rather than selling the highest possible number of handsets. This helps in a market where there are still lingering doubts about quality.

"We aim to let customers feel that we are a very special brand when they come into contact with our products in various scenarios," says Zhu. "We want to be an iconic technology brand. We want the brand to be loved. And to succeed at this requires dedication – and patience," he adds.

"It also requires an understanding that it's not all about sales. Ultimately, success depends on first creating an authentic consumer experience."

Wu Xiaobo

Financial Writer and Sponsor
of the Chinese New Makers
Acceleration Project



Wu Xiaobo is a journalist, financial writer, Harvard University visiting scholar, and the author of a range of books on Chinese business, including the best-selling “Big Defeat” and “Thirty Years of Agitation”. He began his career with the state-run Xinhua News Agency, and has since written for titles including Oriental Morning Post and Hangzhou Daily.

FOLLOWING THE HERD?

Middle-class demand for quality inspiring next generation of entrepreneurs

Long-haired goats grazing on the lush pastures of Inner Mongolia’s Alashan Plateau might seem an unlikely symbol of China’s push for globalization.

Yet the high-end cashmere fashion products created using the fleece of these distinctive white goats, made by the fast-expanding brand Sandriver, is indicative of a seismic shift taking place in Chinese business.

Wu Xiaobo, respected journalist, business author and China commentator, points to Sandriver – and its entrepreneur founder Guo Xiuling – as reflecting the rise of a new generation of Chinese businesses looking to conquer global markets as well as their own.

“Her home is in Inner Mongolia and it’s one of the best cashmere-producing areas in the world,” Wu says.

“Her dream is to bring the best Chinese cashmere products to the world. Now, Sandriver products have entered the European and American markets. Not long ago, they featured at Milan Fashion Week, and recently entered Aman Resorts.”

This business is among a growing number of Chinese brands focusing on quality and, in doing so, starting to shift perceptions of what “Made in China” means to international consumers.

“If Chinese enterprises want to go overseas, the most important thing they need to do is to change the world’s stereotypical impression that Chinese goods are low in price but poor in quality,” Wu says.

This shift in perception is something he says the US, Germany and Japan have all had to overcome; now they are recognized by consumers globally as leading centers of quality manufacturing – and home to some of the most respected brands in the world.

“Chinese brands will go through the same process,” Wu says. “The competitiveness of an enterprise or a brand mainly comes from two aspects. The first is price, the second is differentiation and uniqueness. In the past, Chinese goods won on price.

“But in the next 10 or 20 years, I believe that the impression of ‘Made in China’ around the world may change ... with persistent effort by Chinese brands and Chinese entrepreneurs.”

Shifting priorities

Switching the focus from price to quality is no overnight task, however, and requires sizable investment in research and development. Until recently, these were of little interest to businesses whose key point of difference was that they were the cheapest.

“In the past, China’s highly price-sensitive consumers and the world’s middle-class consumers were very different,” he says.

Wu knows this well; in 2009, he carried out in-depth interviews with 20 entrepreneurs about their business models and priorities. He concluded that Chinese businesses lacked innovation because local consumers were so sensitive to price that there had been little appetite to fund R&D.

That has now changed, as domestic buyers become choosier and are increasingly willing to pay a premium for quality.

“Those same entrepreneurs I spoke to would now tell you they absolutely regard quality, brand, innovation and service as key.”

Chinese businesses now have a new appreciation of the importance of quality for global shoppers, too.

“There’s no doubt that the new middle-class consumers in China are much more similar to those in the rest of the world.” And that means the domestic market becomes a better training ground for success elsewhere.

“There are 250-300 million urban middle-class people in China – they’re already the largest consumer group in the world,” Wu says. “In the next 20 years, this number is expected to double. I believe that in the future, the Chinese brands able to win the favor of domestic middle-class consumers will also be globally competitive.”

Catching dreams

Appealing to these discerning buyers, at home and abroad, means building a brand at the same time as focusing on sales in the short term.

“The market has provided opportunities for both brand building and sales,” Wu says. “Visionary companies will strive to create a positive cycle between the two, to increase sales and profits, and in turn further enhance the brand and quality of their products.”

These visionaries, he stresses, can be leaders of what are now quite small businesses. With the right

help in identifying markets and creating highly targeted marketing, these emerging brands can have an international impact and develop a global brand.

In April 2018, Wu launched a program called “Chinese New Makers Acceleration Project”, designed to promote producers of high-quality Chinese products that could not only succeed in a global market, but also perform an ambassadorial role for what “Made in China” could represent.

A business acceleration scheme for these “craftsmen” followed in October 2018, and now Google and Channel Wu are partners in the “New Makers Brands Global Dream Plan”, which helps guide these small and medium enterprises as they enter overseas markets.

“Many of these enterprises find it very difficult to take their first steps abroad,” Wu says.

“We hope that with the help of Google, we can lower the threshold for these enterprises to go to global markets – including cognitive and operational thresholds – so that overseas users can know about them more directly and more conveniently.”

Sandriver, the Inner Mongolian cashmere brand, is part of the Dream Catching program. While the brand’s growth comes from consumer

appreciation of the fine fibers from the Alashan goats, achieving speedy and efficient business success abroad also depends on highly targeted marketing services.

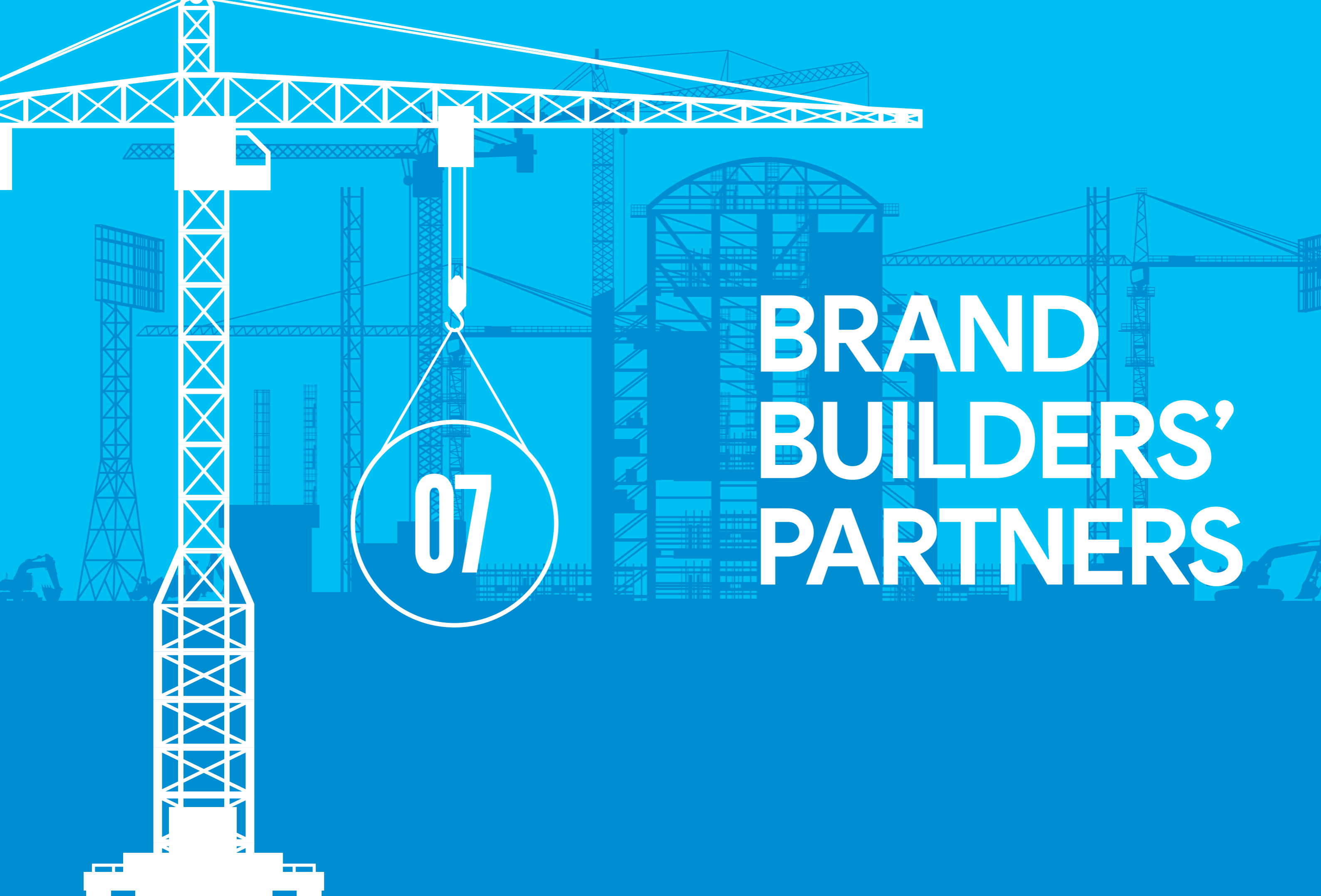
Ultimately, says Wu, the market will decide. “I hope that regardless of whether

they come from China or other countries, brands will focus on consumers, observe changes in the market and provide goods and services that meet people’s needs. And the brands that do this best will win.”



The market has provided opportunities for both brand building and sales. Visionary companies will strive to create a positive cycle between the two





07

BRAND BUILDERS' PARTNERS

Annabel Lin
VP of Sales
Google China



GLOBAL BUSINESSES SUCCESS POWERED BY AI

How data is the
key to unlocking
consumer insights

Like athletes who train at high altitude, most Chinese brands aiming to go global have a distinct advantage – they've already tested themselves in what is probably the toughest market in the world.

Those that survive are well positioned to face the challenges of markets overseas, because they will have demonstrated three essential strengths: scale, speed and innovation.

China is a vast and lucrative market itself, of course, but it still only represents 20 percent of the world's consumers, and Chinese businesses increasingly want a slice of that bigger pie.

In recent months, we've seen soaring numbers of Chinese brands expanding abroad. Just a year or so ago, these brands were led mainly by technology producers, mobile gaming, and e-commerce specialists. The range of sectors expanding beyond China is now widening, from those in the automotive industry, to content producers like film-makers and mobile app developers. All are looking at the international market afresh.

They're also spurred on by having seen other Chinese brands become major global contenders.

Making the grade?

What's changed alongside entrepreneurs' aspirations is international consumers' openness to buying things bearing the "Made in China" brand. Our research shows this is especially strong among millennials, though attitudes still depend a lot on category.

People buying a mobile game couldn't really care less where it's made, as long as it's fun and it works. It's different, of course, if they're buying, say, a car. Few Chinese automotive brands are known outside China, so there's a need for reassurance. When

it comes to mobile handsets, public opinion outside China is somewhere in the middle of the spectrum: people might know Huawei phones are great, but don't regard all Chinese brands as being at the same stage in terms of quality or innovation.

Consumers, though, often find they are behind the curve. What's interesting to me is how people very often buy a Chinese brand without realizing. For instance, there's a brand called Anker, founded by a bunch of ex-Googlers. They make high-end chargers and other accessories. When I travel to the US and see friends using their products, I mention that they're Chinese, and they're like, "Wow! Really?" This is the way the "Made in China" marque is moving up the value chain.

Urgent mission

The task for Chinese brands is therefore to draw on the strengths they've built up at home – and which set them apart on the global stage. But they also need to keep working on shifting public opinion about what "Made in China" stands for.

The other core challenge for Chinese brands with global ambitions is in fact a lot like that faced by the

multinationals who first entered the China market back in the 80s. Those that simply offered what had worked elsewhere found they got little traction in China; it took sensitivity to the culture of local consumers to resonate and succeed. "Thinking global, acting local" is the mantra.

Chinese brands going global now need to demonstrate they can win on something other than price. And there's a real sense of urgency about this, because someone else can always do things cheaper – even if it's only for long enough to put you out of business.

What this all adds up to is the fundamental need to build a strong brand. A brand that makes emotional connections and tells stories that resonate with individuals.

The Google connection

So, what's this got to do with Google? Well, we're able to apply artificial intelligence and machine learning to market insights and trends in multiple ways to help brands go global. Three key applications are:

- Data analytics to guide brands on what people are interested in; what motivates them and moves

them. This can guide development of high-impact creative, and link the right messages to different audiences.

- Smarter marketing, using AI and machine learning, can ensure brands communicate more efficiently, matching audiences, messages and – crucially – great timing.

- Going beyond individual campaigns, to build up brand equity that pays dividends over the long term. This is about building a meaningful presence that makes an emotional connection.

Brands going global must remind themselves that Chinese and Western ways of thinking are very different. Showing respect for consumers in new markets means being human, and enriching their lives with powerful storytelling that generates powerful connections.

The world is full of ambiguities and brands need to look at how they embrace them all. They need to do this right for each market and for each consumer.

Doreen Wang
Global Head of BrandZ™
KANTAR **MILLWARD BROWN**



THE PATH TO GREATNESS

Building a global Chinese brand, step by step

The scale and influence of Chinese brands on the world stage has grown tremendously over the last decade. Back in 2006, there was just one Chinese brand in the BrandZ™ Global Top 100; in the 2018 ranking, there were 14.

The initial growth phase of Chinese brands was founded on the country's strength as a low-cost production center and, in the tech sector particularly, protection from outside competitors.

The next phase came from brands seeking to augment their domestic success with sales in other markets, often targeting countries with a large Chinese-speaking population.

Now, Chinese brands are seeking true global status. The 2019 BrandZ™ Top 50 Global Brand Builders Study highlights those that have best succeeded. Huawei, Lenovo and Alibaba make the top three and are all known internationally not just as Chinese businesses but as global brands.

While there remain significant challenges for Chinese brands with aspirations of global success, it is becoming a less difficult path to tread. To guide brands in their pursuit of international growth, we have identified four important steps towards building a Chinese brand – globally.

1 INCREASE BRAND POWER

Brands with high Brand Power have strong engagement with consumers, who in turn feel strong desire for the brand. Super-charging Brand Power means focusing on being more:

- **Meaningful:** meeting or surpassing consumers' needs and appealing on both an emotional and rational level;
- **Different:** being unique in way that benefits consumers, setting trends for others to follow;
- **Salient:** being the brand that springs to mind when consumers have a need.

2 STAND FOR SOMETHING BIG

All companies are based on an idea, but the most successful brands have a purpose. The higher the purpose, the greater the potential of the brand. A purpose determines how a brand will make someone's day that bit easier or more fun – or even do something transformative to improve people's lives.

A purpose is most effective when driven by the CEO and shared by everyone involved in the brand – not just the marketing department. At Huawei, for instance, all 180,000 employees own a stake in the business, underlining their shared responsibility for success.

3 LEVERAGE THE SPEED OF CHINA'S MARKETS

Chinese companies are known for their ability to make things happen staggeringly fast, and this gives them a global advantage. Look how well the 11/11 "Singles Day" sales have been boosted by internalization of the event.

Being fast means working on logistics, especially for e-commerce brands seeking to win business around the world. Speed of delivery is major consideration for shoppers, and Chinese brands must deploy all their home-grown skills of speed and organization to win them over.

Speed also means reviewing business objectives based on a 10-year vision. Pursue great opportunities, avoid risks as they arise, but stay focused on the goal – even if that means changing course.

4 TEAM UP WITH LIKE-MINDED BRANDS

Form alliances with brands you see as leaders and innovators in their own category and which already have a loyal consumer following. Alliances could include:

- Technical partnership – on a product that combines the "best of both worlds"
- Design partnership – working with a brand whose designers are seen as cutting-edge
- Distribution partnership – selling your brand via the online store of a leading non-competitor brand
- Systems/Communications partnership – leveraging the brands that can better connect you with your audience. This is part of constantly looking beyond the accepted way of doing things.

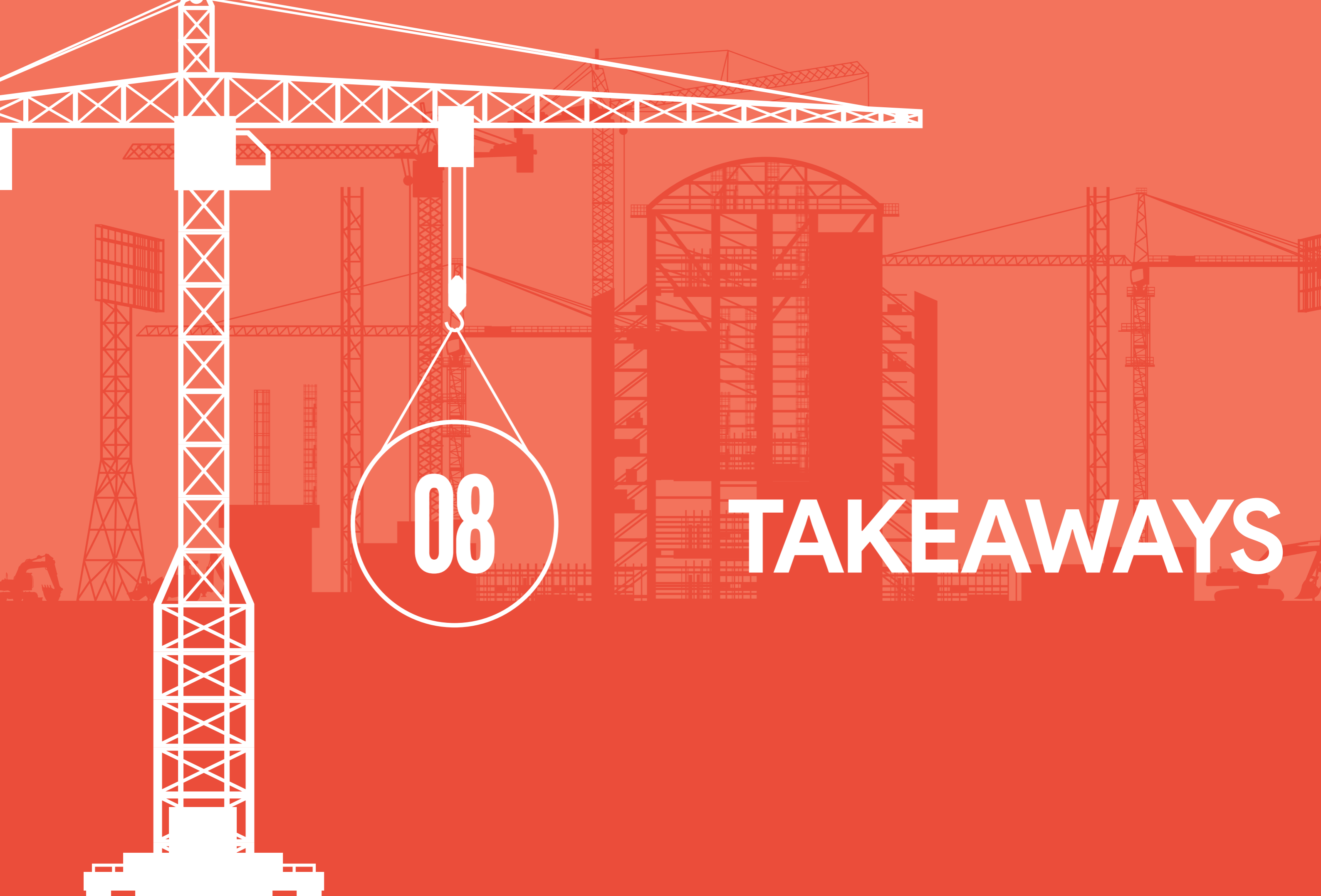


TRAVEL CHECKLIST

- Build a brand at the same time as building scale. Awareness is a key part of this, but not the full story.
- Stand for something. Have a mission to make people's lives better that resonates globally.
- Commit. Don't dip in and out of markets, and think long term about ROI.
- Behave like a global brand. Be strategic about where to invest, recruit the best staff - wherever they are - and use global partnerships and technology to achieve scale.
- Adapt to each market. Being global isn't about being monolithic; it's about a global strategy, locally executed.
- Keep innovating, and ensure consumers know that's what you're doing.

Remember: brands that make a meaningful difference to people's lives, in an ethical way, will travel.

Here's wishing you a successful journey!



08

TAKEAWAYS

10 BIG TAKEAWAYS



The world beyond China is not only a vast but also deeply varied place, and for brands with global vision, knowing where and how to start can sometimes be the biggest challenge – particularly when resources are scarce.

Imprecise targeting of products, services and communications can swallow up even substantial budgets in an instant, leaving little or no impact on consumer preferences or the competitive landscape. Global expansion can be a high-risk endeavor – a risk that BrandZ™ and Google are keen to help Chinese brands mitigate.

In this report, we've shown how the most successful Chinese Global Brand Builders have powered their growth around the world – and our one-on-one interviews shine a light

on the learnings of individual Chinese global brands, outstanding businesses that have generously shared their experience for the benefit of those brands that might follow.

Here, we summarize the key lessons, drawn from our data analysis and the qualitative, first-hand experience of our expert contributors and interviewees.

They are grouped under three themes:

- A Global aspiration**
- B Local execution**
- C The power of communication**

When brands pursue all three in unison, amazing things – international brand growth and global business success – become possible.



GLOBAL ASPIRATION

“Brand is something that a competitor can’t take away from you.”

Ben Wong,
Chief Marketing Officer,
Google Greater China

HAVE ‘BRAND-CENTRIC’ AMBITIONS

Products and services can come and go, but a strong brand that stands for something meaningful, beyond what a business actually makes and sells, can last many lifetimes. A strong brand with a powerful purpose is what gives a business permission in consumers’ minds to move into new products, services and sectors – and to try new business models. It all hangs on the brand. And our research in markets all over the world shows there’s a compelling correlation between strong brands, valuable brands, and financially successful businesses.

MAKE DATA-DRIVEN DECISIONS IN DETERMINING YOUR ROUTE TO MARKET

Linking first-party data with market insights, trends data and behavioral data can help brands identify where the strongest areas of opportunity lie in their sector – and specifically for Chinese brands in their category. At its broadest level, this means helping guide a brand’s decision on whether to launch first in market A or market B, but it goes far beyond this. Data can also identify precisely what consumers really need, and therefore where the opportunity lies for brands.

FIND A STRATEGIC ‘GO GLOBAL’ PARTNER

It’s often said that two heads are better than one, and when brands look to make an impression on the global stage, it’s sometimes the case that two brands can achieve more together than either one in isolation. A partnership between two brands that share the same sense of purpose – perhaps on customer service excellence, or technical innovation – can intensify the message they are working to project. Successful partnerships can be based on an ownership link, perhaps when two brands share an investor, and there have been several instances of Chinese brands linking with well-known global brands to integrate the technology of one into the other, for mutual benefit. When consumers recognize one brand in a partnership but know less about the other, the relationship between the two can provide reassurance.



LAS VEGAS
Photography by Paul Reiffer



LOCAL EXECUTION

4

DRAW ON THE BEST LOCAL TALENT TO IDENTIFY THE BEST LOCAL INSIGHTS

To draw the most useful learnings from rich data streams requires insights to be seen through the lens of experts in local business and consumer culture. And who better to provide that expertise than people with experience in each target market? Some of the most successful Chinese global brands spend many months – and significant resources – embedding their Chinese staff with local companies and experts to gain a deep understanding of what works locally. They also hire senior people from leading local brands who know how things are done. This approach is reminiscent of many Western multinationals' entry into China in the 1990s; those who tried to roll out a Western model largely failed, while those who worked with Chinese staff to understand the nuances of the local market were able to ensure they had a locally relevant proposition.



When going global, brands need to respect the customer needs in each market. I often see that when a business goes to a new market, the whole marketing team is local people, and they trust the local team. It's like when a US company comes to China – they find it very difficult if they don't get some Chinese talent. They do have an intention to localize; the question is often more 'how?' than 'why?'.

Ben Wong, Chief Marketing Officer,
Google Greater China



5

TAILOR PRODUCTS AND COMMUNICATIONS TO MEET LOCAL NEEDS

There are a great many brands that have failed because they believed that having an outstanding product that sells well in one country can simply be exported to another. Products, services and communications strategies all need to be adapted to each new market. This sounds like an immense challenge, and it is. But it's also an exciting opportunity to find ways of connecting with consumers in each market – to be a global brand with the depth of affinity that usually only a local brand can generate.

6

LOOK AT THE PURCHASE-DECISION JOURNEY WITH FRESH EYES

Brands that have built themselves up in China before going global need to leave behind their assumptions about consumers' path to purchase. Urban Chinese consumers' connectivity is unmatched outside the country, so while a holidaymaker in China would probably go direct to Ctrip or another travel brand online, for global consumers the process is far more likely to start with a simple online search – which gives brands many more opportunities to influence decision making.



THE POWER OF COMMUNICATION



BE WHERE YOUR CONSUMERS ARE

The proliferation of media channels and the fast-changing nature of media consumption means that for most brands, it's now impossible to fund communications that reach everyone. But fortunately, the data-rich age in which we now work means maximum reach is no longer the objective. Targeted reach is what it's all about – not just getting a message to the right people, but also the right message, at the right time for each individual. That's not science-fiction; it's available now thanks to rich data analysis that can inform brands of the right channel strategy to pursue – how to divide their budgets by media and by approach, such as online search and online video – and even inspire the kind of creative that's most likely to be effective for each member of a target audience.



CREATE COMPELLING, HIGH-QUALITY CONTENT

Storytelling is an essential part of driving brand awareness, helping brands make meaningful and memorable connections with consumers, and building loyalty. It can also be used to deliver on short-term objectives, such as promoting the features of a new product and converting browsers to buyers. Video storytelling has long been a powerful way to build a brand; now brands can use online video to reach greater numbers of people in new and creative ways. The ability to target audiences also gives them the opportunity to present content that's tailored to resonate with specific groups of people – and even individuals.



DRAW ON THE POWER OF INFLUENTIAL PEOPLE

Consumers place immense trust in the recommendations of people they feel have their best interests at heart. While friends and family used to be the first port of call for advice on products and services, the sense of intimacy created by online media means that online influencers such as video bloggers now also feel like friends and are sought-after sources of wisdom. For brands, the opportunity to join forces with influencers who share their values – and who are passionate about the subjects they talk about – is incredibly powerful. As well as giving them another way to influence a purchase decision, online influencers enable brands to open up conversations with consumers rather than simply send out messages.



MEASURE CAMPAIGN EFFECTIVENESS - USING THE RIGHT METRICS

To achieve effective brand communication, it is just as important to track a campaign and make adaptations on the go as it is to get media channel planning and creative development right. The impact of communications can be improved by assessing how the marketing strategy fits with the level of brand maturity in a given market, and this will help determine the evaluation metrics to be deployed and emphasized. For example, while the emphasis in a new market might be building awareness – simply getting your name recognized – priorities change as consumers become familiar with it. Real-time measurement tools of the effectiveness of communications – using metrics that really matter to a business – can steer a brand towards the right mix of messages and media, and guide the evolution of campaigns over time.



A FINAL THOUGHT

As more Chinese brands seek to fulfil their global growth aspirations, they do so with unprecedented wind in their sails.

Thanks to expanding and improving road, rail and shipping links, China's connections with the rest of the world are making the physical business of reaching new markets so much easier.

These physical networks are complemented by increasingly sophisticated neural networks which, through super-fast analysis of vast amounts of consumer, market and business data, can help brands make smarter and quicker data-driven decisions about how best to expand.

BrandZ™ and Google are working together to help Chinese brands on their global expansion journey - uniting the best Artificial Intelligence available with human intelligence generated through deep, long-term experience in markets all over the world.

We are available to help you and your brand.

Annabel Lin
VP of Sales
Google China

David Roth
CEO, The Store WPP, EMEA & Asia,
Chairman, BrandZ™ and BAV Group





09

RESOURCES

Methodology

Methodology combines BrandZ™ analytics and Google capabilities

To measure consumer perception of Chinese brands outside of China we created a four-step methodology that leverages WPP BrandZ™ analytics with Google’s online reach and data gathering capabilities. BrandZ™ is the world’s leading source of brand equity and valuation knowledge and insight. Google Surveys is an online market research tool for rapidly gaining knowledge and insight about the attitudes and behavior of people worldwide.

Step 1: Country and Category Selection

Because Chinese brands are relatively well-known in neighboring countries and emerging markets, we chose to focus on markets with future export potential. We selected these seven developed markets from different geographic regions: the US, the UK, France, Germany, Spain, Australia, and Japan.

We also selected a mix of 12 established and internet-driven categories in which Chinese brands are active overseas: consumer electronics, home appliances, airlines, cars, smart devices, mobile gaming, e-commerce, online fast fashion, payment networks, oil & gas, banks and content apps. Chinese brands and international brands together total at least 80 percent of the market share in these categories.

Step 2: Brand Selection and Quality Assurance

Within the 12 categories, we selected Chinese brands based on the extensive BrandZ™ database and Google’s expertise. The Chinese brands met two eligibility criteria:

1. Each brand was originally created by a Mainland China enterprise; and
2. Each brand derives a portion of revenue from overseas business.

In each category we also selected non-Chinese brands (local country brands and global brands).

WPP and BrandZ™ experts in each relevant country market reviewed the preliminary lists of brands for accuracy.

The preliminary list totaled 203 Chinese brands and 594 non-Chinese brands. Using Google Surveys, we conducted two rounds of research to measure levels of awareness and consideration for brands in this preliminary list in the seven country markets. With the first round of research we identified the brands highest in awareness and consideration. This exercise yielded our final list of 120 Chinese brands.

To research each category across the seven country markets, we then created multiple questionnaires. In each questionnaire we limited the number of questions to 10, the

maximum permitted by Google Surveys in order to maximize response. For each question we presented six brand multiple-choice answers. We varied the answer options to ensure fairness.

Step 3: MDS and Preliminary Brand Power

Google Surveys also yielded data for computing the preliminary Brand Power of each brand. Brand Power is a BrandZ™ metric of brand equity, the predisposition of consumers to choose a particular brand. Three ingredients comprise Brand Power: **Meaningful** (meeting functional and emotional needs in relevant ways); **Different** (being distinctive or trend setting); and **Salient** (coming easily to mind in a buying situation). We calculated the Meaningful and Different scores of each brand based on survey answers. We determined each brand’s Salience based on survey answers and the brand’s search index in Google and YouTube.

Step 4: Standardization and Final Brand Power

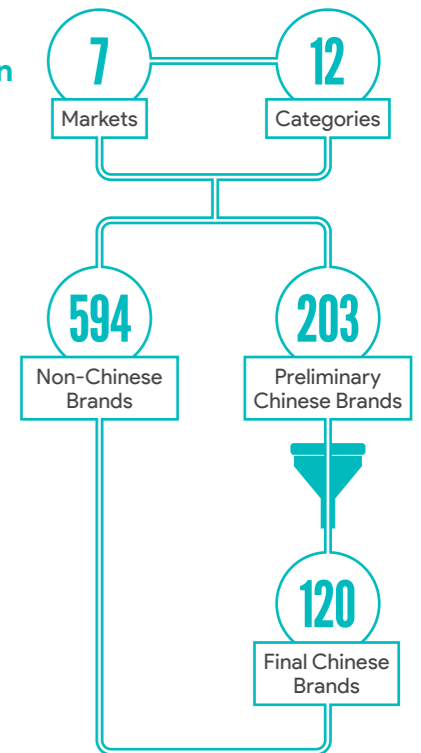
Once we had calculated the preliminary Brand Power score, we leveraged the levels of awareness and consideration for the 594 non-Chinese brands to adjust for the impact that variations of category size and market competition have on the Brand Power scores of the 120 Chinese brands. This standardization enabled us to make fair comparisons across the 12 product categories and seven country markets. We added these final Brand Power scores across the seven country markets to produce the BrandZ™ Top 50 Chinese Global Brand Builders ranking.

Google Surveys Market research tool helps inform business decisions

Google Surveys is a market research tool that enables users to easily create online and mobile surveys in order to help make more informed business decisions. People browsing the web come across the survey questions when they try to access premium content like news articles or videos and publishers get paid as their users answer the questions. On mobile devices, people answer questions in exchange for credits for books, music, and apps. Google aggregates the responses and insights are automatically created, freeing users from the burden of more difficult analysis. To learn more, visit [google.com/analytics/surveys](https://www.google.com/analytics/surveys).

STEP 1 Country & Category Selection

We selected seven country markets with substantial future export potential, and 12 product categories in which Chinese brands are active overseas.

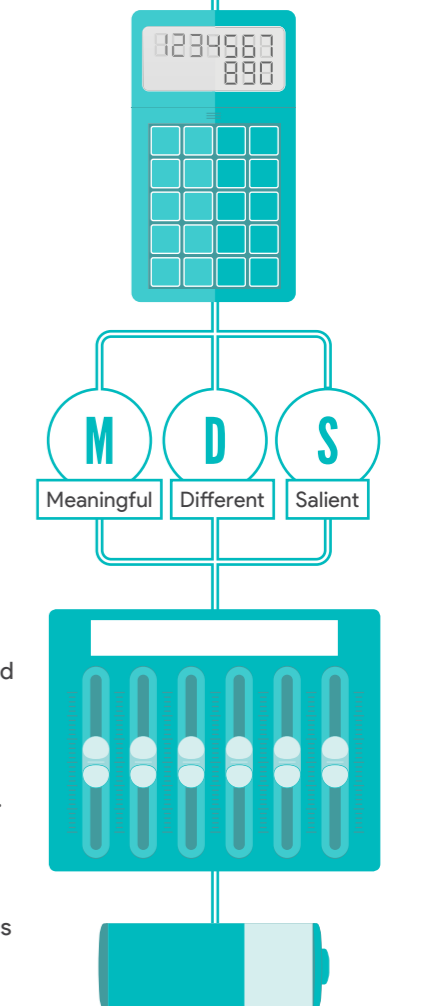


STEP 2 Brand Selection & Quality Assurance

We selected 594 non-Chinese brands and an initial 203 Chinese brands. We then filtered the Chinese brands to include only those with relatively high awareness and consideration scores. This exercise yielded 120 Chinese brands.

STEP 3 MDS & Preliminary Brand Power

We achieved a preliminary Brand Power score by calculating the scores for each Chinese brand in the three ingredients of Brand Power: Meaningful (meeting functional and emotional needs in relevant ways); Different (being distinctive or trend setting); and Salient (coming easily to mind in a buying situation). Brand Power is a BrandZ™ metric of brand equity, the predisposition of consumers to choose a particular brand.



STEP 4 Standardization & Final Brand Power

We leveraged the levels of awareness and consideration to adjust for the impact that variations of category size and market competition have on the Brand Power scores of the 120 Chinese brands. This standardization enabled us to make fair comparisons across the 12 product categories and seven country markets. We added these final Brand Power scores across the seven country markets to produce the BrandZ™ Top 50 Chinese Global Brand Builders 2019 ranking.

BrandZ™ Genome Mapping

The Science Behind Our Art

One of humanity's greatest recent achievements was successfully sequencing our own genome in 2003, revealing the key building blocks of what makes us each unique.

NOW BRANDZ™ GIVES YOU THE ABILITY TO DO THE SAME FOR YOUR BRAND OF CHOICE

118

- BRAND EQUITY
- BRAND EQUITY BUILDING BLOCKS
- BRAND STORIES
- DIGITAL FOOTPRINT
- BRAND VALUATIONS
- BEST COUNTRY RANKINGS
- POWERED BY BRANDZ

25 • BRANDZ™ Genome Product Number

BRANDZ™ Genome Symbol

Name

Number of Brands Ranked

The BrandZ™ Brand Genome visualizes your brand's "genome" on a page, with all the genome sequence measures providing an instant overview of your brand.

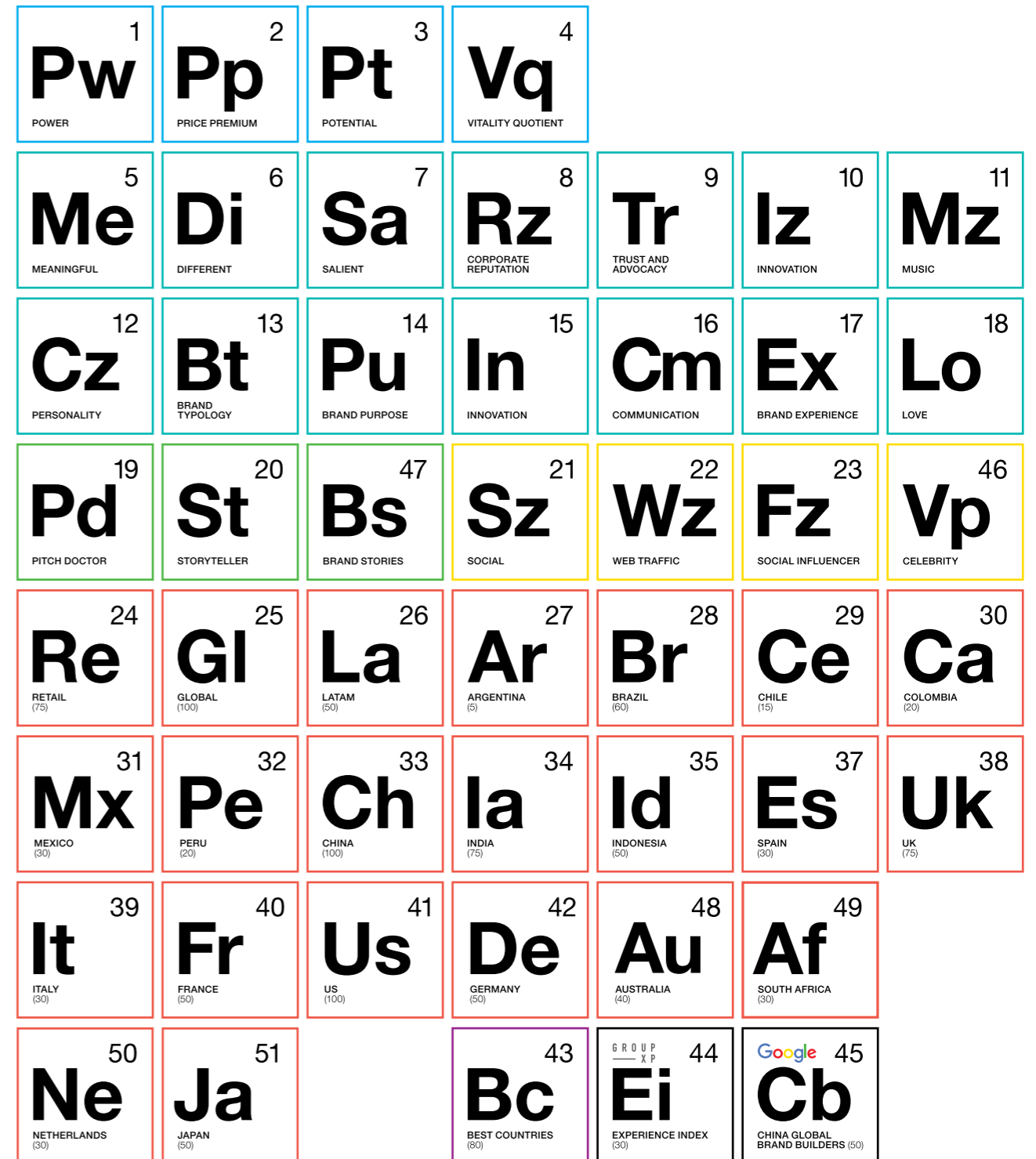
The ultimate tool for a new business pitch and a lot more

Brand Genome is a unique BrandZ™ tool, exclusive to WPP. It's free, available 24/7 and takes just seconds to create.

Visit <http://genome-measures.wppbrandz.com/> where you will be able to find out about each of the BrandZ™ measures, what they are, how they are calculated and how you can access a report which contains the measure.

To download a sample genome map visit: <http://wppwrap.com/bg.pdf>

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BrandZ™ Genome Mapping

The Science Behind Our Art

BrandZ™ Brand Building Tools and Personalized Publications

Only available via your WPP Agency



Vitality Quotient (vQ)
Diagnose a brand's health based on five elements that are proven to grow brand value: purpose, innovation, communication, brand experience, and love.



RepZ
Maximize brand and corporate integrity using four key factors to drive reputation: success, fairness, responsibility and trust.



TrustR
Consumer trust and advocacy are both important for brand growth but the combination of the two is the real sweet spot. TrustR examines this relationship in detail.



InnovationZ
Evaluate a brand's perceived innovative power, what drives it and why it's important. Discover sector-relevant real-time innovation and startup ideas, sourced via the exclusive Springwise global network of spotters.



CharacterZ
This innovative deck allows you to diagnose brand character and delve into the dynamics, clarity and consistency of a brand's personality.



PitchDoctor
Everything you need to know about your brand's strengths, weaknesses, opportunities and threats in one easy-to-digest page.



StoryTeller
An interactive data visualization tool to allow anyone to create story-led insights on how to build and maintain brand equity.



SocialZ
A real-time social media analytics dashboard that allows you to take a deep dive into the world of real-time consumer sentiment around the world.



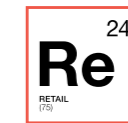
WebZ
Analyze how traffic is driven to a brand's website, understand audience demographics and gain insights into viewer trends.

Going Global?

We wrote the book

BrandZ™ Country Reports: Essential Travel Guides For Global Brand Building

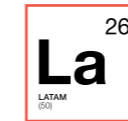
Our BrandZ™ country reports contain unparalleled market knowledge, insights, and thought leadership about the world's most exciting markets. You'll find, in one place, the wisdom of WPP brand building experts from all regions, plus the unique consumer insights derived from our proprietary BrandZ™ database.



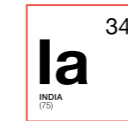
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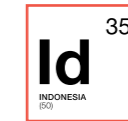
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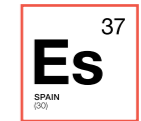
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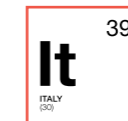
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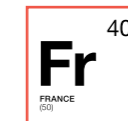
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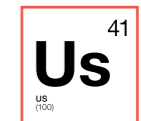
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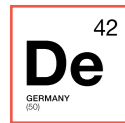
BrandZ™ Top 50 Most Valuable French Brands 2019
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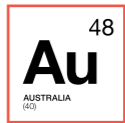
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BrandZ™ Genome Mapping

The Science Behind Our Art



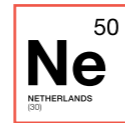
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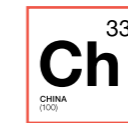
Looking East

In-depth brand-building intelligence about today's China

The opportunity to build brands in China is greater than ever. But so are the challenges.

The fastest growth is happening deep in the country, in less well-known cities and towns. Consumers are more sophisticated and expect brands to deliver high-quality products and services that show real understanding of local market needs.

WPP has been in China for over 40 years. We know the Chinese market in all its diversity and complexity. This experience has gone into our series of BrandZ™ China reports. They will help you avoid mistakes and benefit from the examples of successful brand builders.



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Spotlight on...



Spotlight on Cuba
Cuba is a market unparalleled both in the Caribbean region and the world. Brand awareness among Cubans is high, but gaining access to them uniquely challenging. Now is the time to plan your Cuba strategy.

brandz.com/article/spotlight-on-cuba



Spotlight on Mongolia
Mongolia's GDP has grown at rates as high as 17 percent in recent years, encouraging a growing number of international brands to gravitate toward this fast-growth market and make a beeline for one of Asia's hidden gems.

brandz.com/article/spotlight-on-mongolia

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Hill+Knowlton Strategies, Inc. is an international communications consultancy, providing services to local, multinational and global clients. The firm is headquartered in New York, with over 80 offices in more than 40 markets, as well as an extensive associate network. The agency is part of WPP, one of the world's largest communications services groups. For more information about H+K, visit our website www.hkstrategies.com, follow us on Twitter, like us on Facebook, and follow us on LinkedIn. H+K has offices in more than 40 countries worldwide, delivering award winning campaigns to clients across all sectors and disciplines and with a focus on continued innovation for the industry. Recent innovations include Flight School +, a crisis communications training and simulation tool, Better Impact™, a new approach to brand purpose and CSR, and H+K Smarter™, the behavioral science team.

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MediaCom is "The Content + Connections Agency", working on behalf of its clients to leverage their brands' entire system of communications across paid, owned and earned channels to deliver a step change in their business outcomes. MediaCom is one of the world's leading media communications specialists, with billings of US\$35 billion (Source: RECMA June 2018), employing 7,300 people in 125 offices across 100 countries. Its global client roster includes adidas, Alibaba Group, Air China, Dell, Mars, P&G, PSA, Richemont, and Shell.

In June 2018 MediaCom was named Cannes Lions Media Agency Network of the Year. This adds to the Agency Network of the Year titles it already holds from The Gunn Media 100, Festival of Media Global (won in 2017 and retained in 2018) and the M&M Awards (an accolade it has won seven times in nine years). It has also been named Global Media Agency of the Year by Adweek in February 2018 and Agency Network of the Year by Campaign magazine at the end of 2017. This is the first time any agency network has held all these titles at once.

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We help build valuable brands

In Greater China, WPP companies (including associates) generate revenues of almost \$1.6 billion with over 13,000 people in Beijing, Shanghai, Guangzhou and many other cities and provinces.

WPP is the world's largest communications services group, with billings of US\$74 billion and revenues of over US\$19 billion. Through its operating companies, the Group provides a comprehensive range of advertising and marketing services including advertising & media investment management; data investment management; public relations & public affairs; branding & identity; healthcare communications; digital, e-commerce and shopper marketing

and specialist communications. The company employs over 200,000 people (including associates and investments) in over 3,000 offices across 112 countries.

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KANTAR In China

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