January 14, 2014

SCOTT GALLOWAY
NYU Stern

L2

DIGITAL IQ *INDEX*®:

Personal Care | China

It's Complicated...

The $41 billion Personal Care market in China has enjoyed mid-double digit growth rates over the last decade.[1] Growth in Q3 2013 slowed to 7.1 percent, on par with GDP.[2] While foreign brands dominate, and in many cases have introduced the product category, there has been mixed success. Revlon and L'Oreal's Garnier brand recently announced they are exiting the market,[3] citing positioning and cost challenges. Global brands all face the same dilemma: how to continue to grow while protecting their rear flank from local brands in a market with tepid IP protection and requiring highly local marketing.

The Moat?

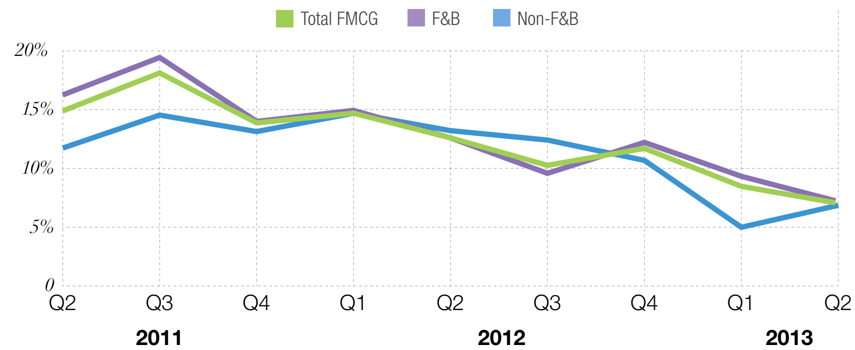
Digital competence may be the moat as e-commerce's share of retail in the personal care category is four times greater than in mature markets (8 percent vs. 2 percent)[4] and domestic brands struggle online. Local Chinese Personal Care brands registered the lowest average IQs for native brands in any L2 Digital IQ Index® to date. With Personal Care e-commerce up tenfold in five years and some categories (e.g., diapers) registering 25 percent of their sales online, they are going to have to figure it out.[5]

Competition is severe, and brands are setting up flagship stores on native e-tailers and collaborating with global e-tailers to broaden their retail footprint online. Rapidly improving online payment and fulfillment infrastructure signal continued growth.[6] Walmart-backed e-tailer Yihaodian has introduced Sina Weibo delivery tracking,[7] one-hour delivery windows,[8] and e-fapiao (electronic invoice) in Shanghai.[9] In April, China's biggest e-commerce platform, Alibaba, purchased an 18 percent stake in leading microblogging platform Sina Weibo.[10] The mother of all commerce plays now provides centralized social login and targeted advertising opportunities across its ecosystem. Mobile social platforms including WeChat leverage mobile payment and loyalty programs to blur the line between online and offline sales.

1. Euromonitor International.
2. "FMCG slowdown stabilises in China," Kantar World panel, October 24, 2013.
3. "Garnier to Exit China," Jennifer Weil, Women's Wear Daily, January 8, 2014.
4. Euromonitor International.
5. Bain & Company & Kantar World panel, October 2013.
6. "Blossom for FMCG e-tailing in China, Taiwan and Korea," Kantar World panel, November 27, 2013.
7. "Sina Weibo Launches Order Tracking Functionality, Yihaodian First To Try," 163 Tech, July 8, 2013.
8. "Yihaodian Relaunches 'Timed Delivery' Within One Hour," 163 Tech, November 21, 2013.
9. "Shanghai Becomes E-Fapiao Test City, Yihaodian Among First To Experiment," 163 Tech, December 31, 2013.
10. "Alibaba Released Weibo for Taobao with Sina," China Internet Watch, August 5, 2013.

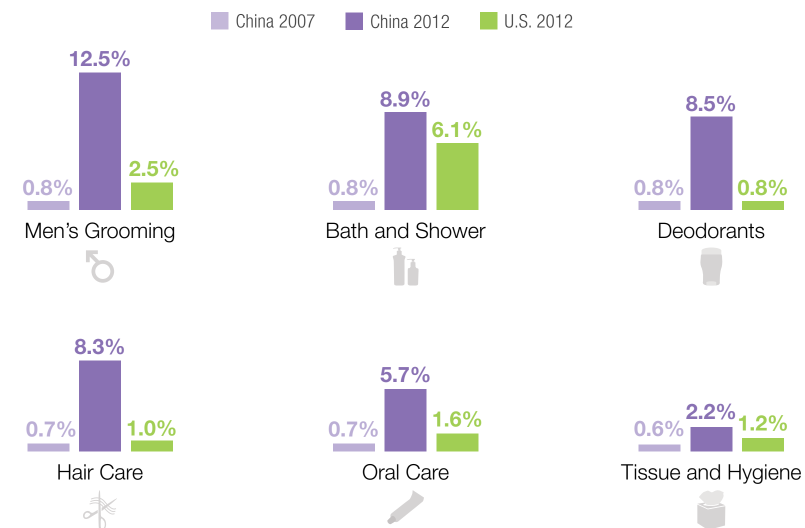
Annual Growth of Urban Shoppers' Total Spending on FMCG

Q2 2011– Q2 2013



Source: Kantar Worldpanel; Bain & Company analysis

E-Commerce as a Percentage of Total Sales by Personal Care Category



Source: Euromonitor International.

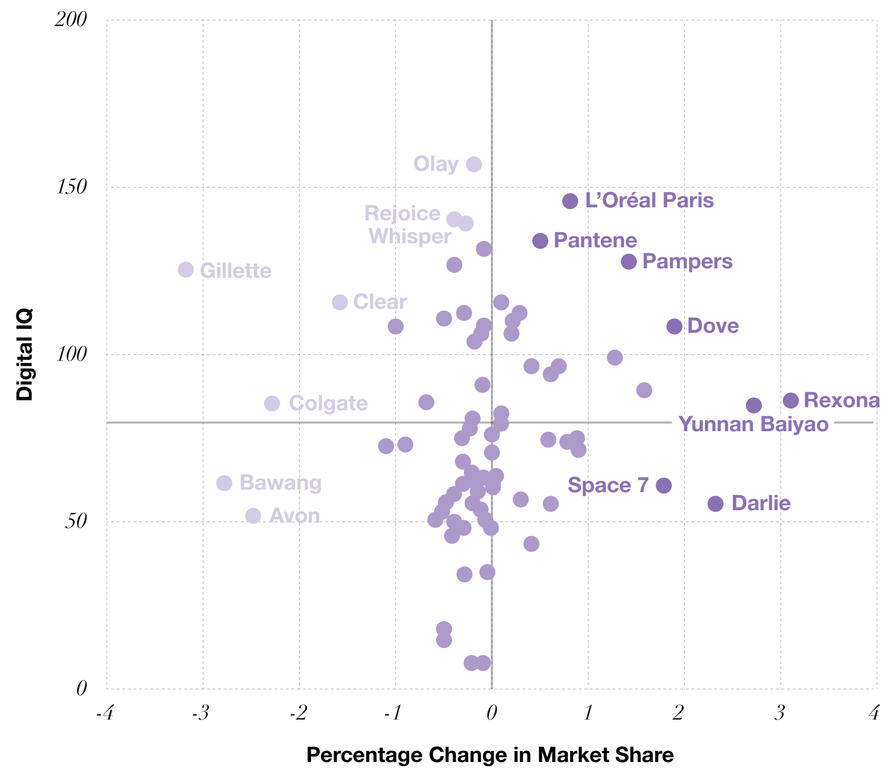
Work to Do

Personal Care conglomerates are some of the biggest advertisers in China, but digital investment is relatively anemic. Procter & Gamble spent 378.7 million RMB ($62.6 million), Unilever 258 million RMB ($42.6 million), and L'Oréal 234.27 million RMB ($38.7 million) on digital advertising in 2012.[11] still a fraction of overall media spend.

Overall, there is work to do:

- Just a handful of brands' products (3 percent) could not be purchased through Tmall and Jingdong, and all products are being sold on Yihaodian. Tmall remains the e-commerce platform of choice with 78 percent of Index brands selling on branded stores on the platform. However, many fail to promote e-commerce on their brand sites and Sina Weibo pages. Just over half of the brand sites link to Tmall for purchase.
- A third of brand sites have broken links or link to expired content, resulting in an average bounce rate of 53 percent. Buggy features, including incorrect display of Chinese characters, undermine brand credibility.
- Just over half of the Index brand sites appear as the first organic result on Baidu for brand queries, and only a quarter are returned in the top spot on burgeoning So.com.
- 92 percent of Index brands maintain a presence on Weibo, but just half are present on mobile platform WeChat. Less than a quarter are active on Renren, Kaixin, Qzone, Douban, and other emerging platforms.

Digital IQ vs Percentage Change in Market Share
China Personal Care
2010–2012, n=73



Digital IQ = Shareholder Value

Our thesis is that digital competence is a forward-looking indicator of success in the Personal Care market in China. This study attempts to quantify the digital performance of 73 global and local brands across key Personal Care categories. Our aim is to provide a robust tool to diagnose digital strengths and weaknesses and help managers achieve greater return on incremental investment. Like the medium we are assessing, our methodology is dynamic and we hope you reach out with comments that improve our approach and findings.

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11. "2012-2013 China Online Advertising Report," iResearch, June 4, 2013.

About the Ranking

The Methodology

30% *Site & E-Commerce*

Localization of Site Features (20%)

Technology:
Load time, Analytics, Videos, Hosting Location, Content/Interactivity, No Bugs/Errors Found

Navigation/Customer Service & Store Locator:
Persistent Nav, Filters, Site Search, FAQs, Webform & Customer Service Number, On-Site Locator

Product Page:
Usage Info, Awards, Merchandising, Video, Content, Cross-sell, Sharing, Reviews, Integration of Chinese Social Media

E-Commerce:
E-tailer presence; Sophistication of e-commerce handoff

Tmall Brand Shop Presence & Sophistication (10%)

Content & Functionality:
Brand Culture, Video, UGC, Tutorial & Interactive Features, Sampling & Couponing

Engagement:
Number of Reviews & Followers, Weitao & Bangpai

25% *Social Media*

Brand Presence, Community Size, Content, and Engagement

Sina Weibo (10%):
Page Size & Growth, Post Frequency, Engagement Rate, Tabs & Applications, Content and Functionality

WeChat (5%):
Content and Functionality

Douban/Renren/Tencent Weibo (5%)*:
Page Size & Growth, Tabs & Applications, Content and Functionality

Youku/Tudou (5%):
Views & Growth, Number of Uploads, Viral Videos

*Only when applicable

30% *Digital Marketing*

Search, Display, and Email Marketing Efforts

Search (20%):
SEM and SEO on Baidu, So.com
Search Visibility & Brand Investment on E-tailers *(Tmall, Jingdong, Yihaodian, Taobao)*

BBS, Social, and Baidu Buzz (5%):
Brand Product Reviews and Popularity on BBSs *(Yoka, OnlyLady, Pclady, Rayli, Baidu Tieba)*
Brand Mentions on Sina Weibo & Average Daily Searches on Baidu

Advertising & Innovation (5%):
Cross-Platform Brand Initiatives
Online & Offline Synergies

15% *Mobile*

Compatibility and Marketing on Smartphones and Tablets

Mobile Site (5%):
Compatibility of China Site, Functionality, Transaction Capability

Mobile Search (5%):
SEO & SEM on Baidu & So.com

Mobile Apps (5%)*:
Availability in China, Popularity, Functionality

*Only when applicable

Digital IQ Classes

Genius 140+
Digital competence is a point of competitive differentiation; successful multichannel, digital campaigns; functional sites that drive to e-tailers; strong social presence and e-commerce integration across platforms.

Gifted 110–139
Brands are experimenting across e-tailers, mobile, traditional and emerging social media platforms.

Average 90–109
Digital presence is siloed by dimensions.

Challenged 70–89
Chinese-specific digital presence lacks inspiration.

Feeble <70
Investment does not match opportunity.

L2 Digital IQ Index®: Personal Care | China

EXCERPT from the Digital IQ Index®: **Personal Care** | China
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January 14, 2014

Digital IQ Ranking

Genius, Gifted, Average

RANK	BRAND		DIGITAL IQ
			Genius
1	Olay	Procter & Gamble	157
2	L'Oréal Paris	L'Oréal Groupe	146
3	Rejoice	Procter & Gamble	141
			Gifted
4	Whisper	Procter & Gamble	139
5	Pantene Pro-V	Procter & Gamble	134
6	Sassoon	Procter & Gamble	132
7	Pampers	Procter & Gamble	129
8	Nivea	Beiersdorf	127
9	Gillette	Procter & Gamble	126
10	Clear	Unilever Group	116
10	Head & Shoulders	Procter & Gamble	116
12	MamyPoko	Unicharm	113
12	Oral-B	Procter & Gamble	113
14	Crest	Procter & Gamble	112
			Average
15	Dove	Unilever Group	109
15	Johnson's baby	Johnson & Johnson	109
15	Safeguard	Procter & Gamble	109

GENIUS
Olay
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Rejoice
GIFTED
Whisper
Pantene
Vidal Sassoon
Pampers
Nivea
Gillette
Clear
Head & Shoulders
Mamy Poko
Oral-B
Crest
AVERAGE
Dove
Johnson's Baby
Safeguard
Huggies
Lady Care
Lynx
Mentholatum
gf
Longliqi
Schwarzkopf
Lux
L'Oréal Professionnel
CHALLENGED
Syoss
Lafang
Rexona
Colgate
Yunnan Baiyao
Kotex
Camay
Decolor
Clean & Soft
Fuyanjie
Hygienix
Sensodyne
Vinda
Slek
Zhonghua
Systema
Blue Moon
Saky
FEEBLE
Maestro
Sunsilk
Kleenex
Bawang
Liangmianzhen
Schick Wilkinson
Space 7
Lesening
Listerine
Liushen
Sofy
Gatsby
Hearttex
Darlie
Anerle
Avon
Bioré
Glister
Liubizhi
Bamboo Salt
G&H
Body Series
Breeze
Johnson's Body Care
Heimei
adidas
Fa
Stayfree
Zici

January 14, 2014

Digital IQ Ranking

Average, Challenged

RANK	BRAND	DIGITAL IQ
18	Huggies (Kimberly-Clark)	107
18	洁婷 Lady Care (C-Bons)	107
18	Lynx (Unilever Group)	107
21	Mentholatum (Rohto Pharmaceutical)	105
22	高夫 gf (Shanghai Jahwa United)	100
23	Longliqi (Jiangsu Longliqi Group)	97
23	Schwarzkopf Professional (Henkel AG & Co.)	97
25	Lux (Unilever Group)	94
26	L'Oréal Professionnel (L'Oréal Groupe)	91
Challenged		
27	Syoss (Henkel AG & Co.)	89
28	LaFang 拉芳 (La Fang International Group)	86
28	Rexona (Unilever Group)	86
30	Colgate (Colgate-Palmolive)	85
30	云南白药 Yunnan Baiyao (Yunnan Baiyao Group)	85
32	Kotex (Kimberly-Clark)	82
33	Camay (Procter & Gamble)	80
33	Decolor 迪彩 (Guangzhou DeColor Cosmetics)	80
35	Clean & Soft C&S 中顺洁柔 (Guangdong Zhongshun Paper Industry Group)	75
35	Fuyanjie 妇炎洁 (Renhe Pharmacy)	75
35	洁云 Hygienix (CIMIC Holdings Shanghai)	75
38	Sensodyne (GlaxoSmithKline)	74

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Sensodyne
Vinda
Slek
Zhonghua
Systema
Blue Moon
Saky
FEEBLE
Maestro
Sunsilk
Kleenex
Bawang
Liangmianzhen
Schick Wilkinson
Space 7
Lesening
Listerine
Liushen
Sofy
Gatsby
Hearttex
Darlie
Anerle
Avon
Bioré
Glister
Liubizhi
Bamboo Salt
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Breeze
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adidas
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Digital IQ Ranking

Challenged, Feeble

RANK	BRAND	COMPANY	DIGITAL IQ
38	Vinda 維達	Vinda International Holdings	74
40	Slek 舒蕾	Beiersdorf	73
40	中華 Zhonghua	Unilever Group	73
42	Systema 细齿洁	Lion Corp.	72
43	蓝月亮 Blue Moon	Guangzhou Blue Moon Co.	71
43	舒客 Saky	Guangzhou Weimeizi Personal Care	71
45	Maestro 美涛	Beiersdorf	Feeble 68
46	Sunsilk	Unilever Group	65
47	Kleenex	Kimberly-Clark Corp	63
48	霸王 BAWANG	Bawang (Guangzhou) Co Ltd	62
49	两面针 Liangmianzhen	Liuzhou Liangmianzhen Co Ltd	61
49	Schick	Energizer Holdings Inc	61
49	七度空间 SPACE 7	Hengan International Group Co Ltd	61
52	冷酸灵 Lesening	Dencare (Chongqing) Oral Care Co Ltd	59
52	LISTERINE	Johnson & Johnson Inc	59
52	六神 Liushen	Shanghai Jahwa United Co Ltd	59
55	SOFY	Unicharm Corp	57
56	GATSBY	Mandom Corp	56
56	Heartex	Hengan International Group Co Ltd	56
58	DARLIE	ColgatePalmolive Co	55
59	Anerle 安儿乐	Hengan International Group Co Ltd	54

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Digital IQ Ranking

Feeble

RANK	BRAND		DIGITAL IQ
60	AVON	Avon Products Inc	52
60	Bioré	Kao Corp	52
62	glister™	Amway Corp	50
62	六必治 Liubizhi	Guangzhou Liby Enterprise Group Co Ltd	50
64	竹盐 Bamboo Salt	LG Household & Health Care Ltd	48
64	G&H body lotion	Amway Corp	48
66	BODY SERIES	Amway Corp	46
67	清风 Breeze	Asia Pulp & Paper Co Ltd	43
68	Johnson's body care	Johnson & Johnson Inc	35
69	黑妹 Heimei	Masson Co Ltd	34
70	adidas	Coty Inc	18
71	Fa	Henkel AG & Co KGaA	14
72	Stayfree	Johnson & Johnson Inc	8
72	滋采 Zici	Zhongshan Magic Co Ltd	8

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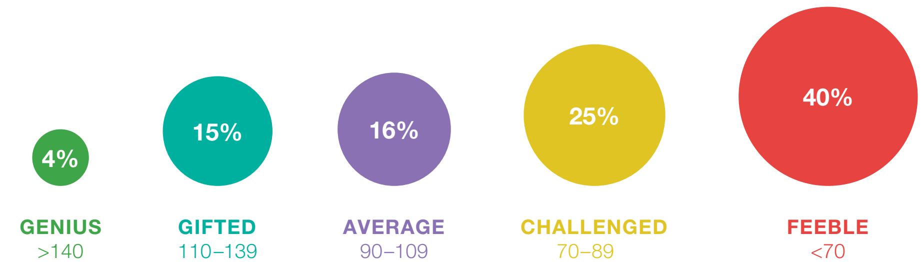
Key Findings

Digital IQ Distribution

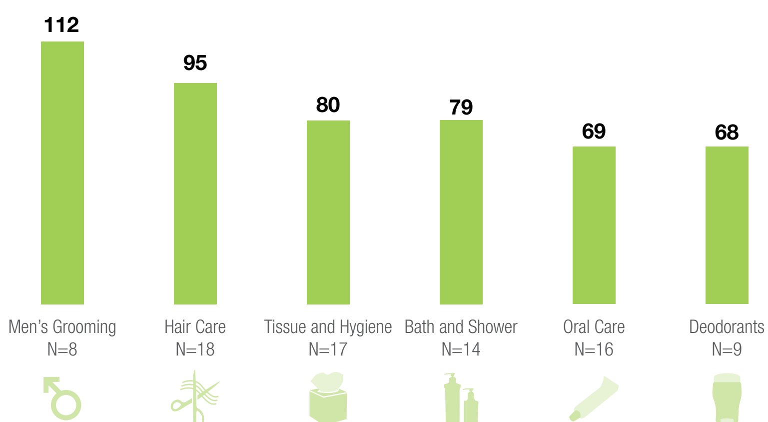
Sixty-five percent of Personal Care brands in China fall into the Challenged or Feeble class, constrained by outdated sites, limited social commerce integration, and a fragmented approach to e-commerce. As local Chinese brands focus on traditional media, global entrants best them online. The 23 local brands in the Index record an average IQ of 67, the lowest native brand scores of any Digital IQ Index® study.

The Men's Grooming sector, unaffected by the economic slowdown in China,[12] posted the highest average IQ, 112. Oral Care and Deodorant brands bring up the rear with average IQs of 69 and 68, respectively.

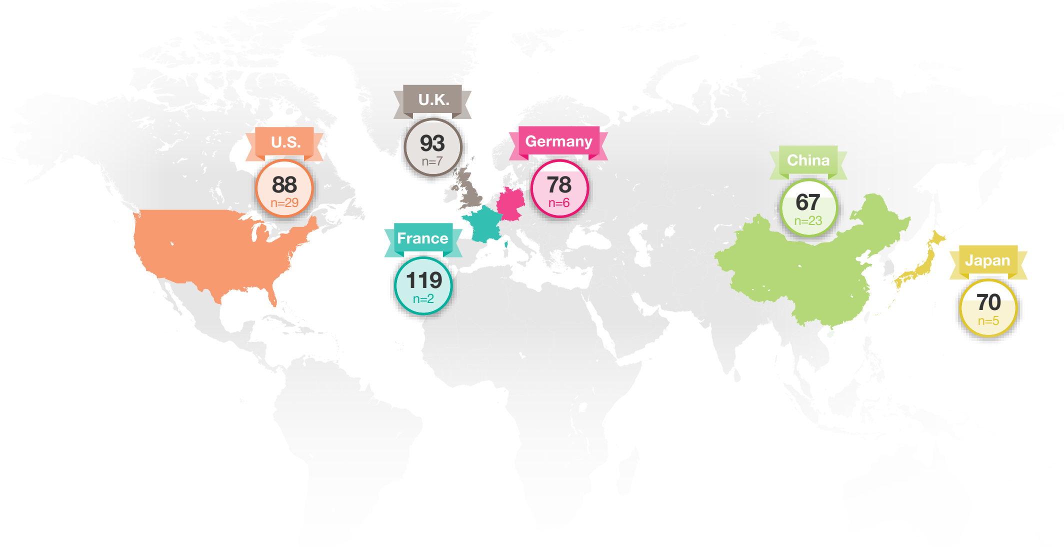
Digital IQ Distribution by Class
Percent of China Personal Care Brands per Digital Class
2013, n=73



Average Digital IQ by Product Category
China Personal Care
2013



China Personal Care Average Digital IQ by Parent Country of Headquarters
Countries with More Than One Brand Represented
2013



12. Euromonitor International.

Key Findings *Site*

Site Technology and Functionality

All but four global brands (Adidas, Fa, Johnson's Body, Stayfree) in the Index maintain a Chinese brand site featuring country-specific content. Of these, 60 percent are ICP-licensed and hosted in China. Unlike prestige brand sites, which suffer average load times of 24.1 seconds, Personal Care brand site load times average just 3.3 seconds (vs. global average of 1.8 seconds).

A third of sites have broken links or links to expired content, resulting in an average bounce rate of 53 percent. Buggy features, including inaccurate Chinese characters, erode brand credibility.

Stale content and lackluster functionality result in an average of three page views per visitor across Personal Care brand sites. Just 30 percent of sites refreshed their home page during the one-month data collection period, and only four brands updated promotions and campaigns. More than half of sites with "News" sections did not post content in the second half of 2013.

Although 44 percent of Chinese consumers base purchase decisions on opinions of strangers,[13] just 7 percent of sites feature user reviews. One in five brand sites do not offer any customer service options. Just 9 percent offer store locators, missing an opportunity to drive offline traffic. Yunnan Baiyao is the lone brand offering direct-to-consumer e-commerce and live chat.

China Personal Care Brand Sites: Customer Service

November 2013, n=69

13. "Meet the New Chinese Consumer," Jeffrey I. Beg, Tzeh Chyi Chan and Xuyu Chen, Accenture, February 2013.

Key Findings *Social Media*

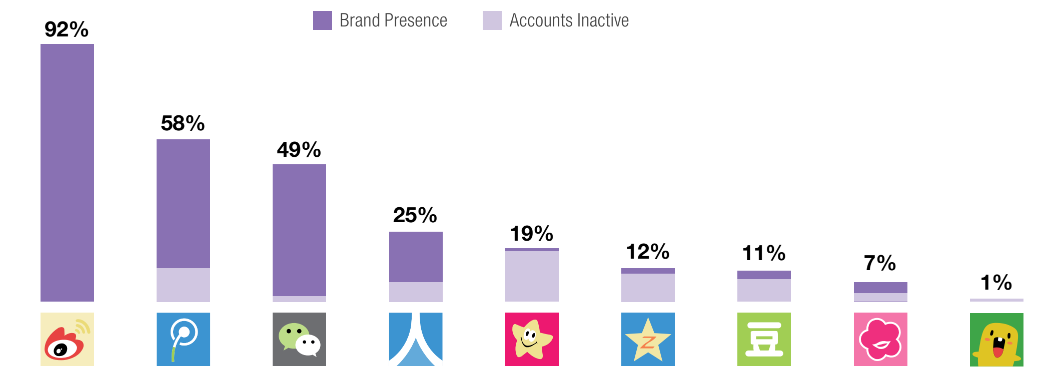
Social Landscape

The Chinese social landscape is dynamic and fragmented, making it difficult to reach and influence consumers at scale. Ninety-five percent of Internet users living in top-tier cities use social media sites. Chinese consumers spend 46 minutes/day on social media, compared to seven minutes in Japan and 37 minutes in the U.S.[14] Although social media platforms have proliferated, ownership is beginning to consolidate. Building off its successful instant messaging tool QQ, social commerce giant Tencent boasts mobile messaging and payment platform WeChat. E-commerce powerhouse Alibaba entered the social game with a minority stake in microblogging platform Sina Weibo, the platform of choice for Personal Care brands. Ninety-two percent of Index brands maintain a presence on Weibo, twice the presence on WeChat. After taking an ownership stake in April 2013,[15] Alibaba linked accounts with Sina Weibo to provide their nearly 130 million common users with a better social commerce experience.[16]

Chinese Social Media Platform Adoption

Percentage of China Personal Care Brands Present on the Following:

November 2013, n=73



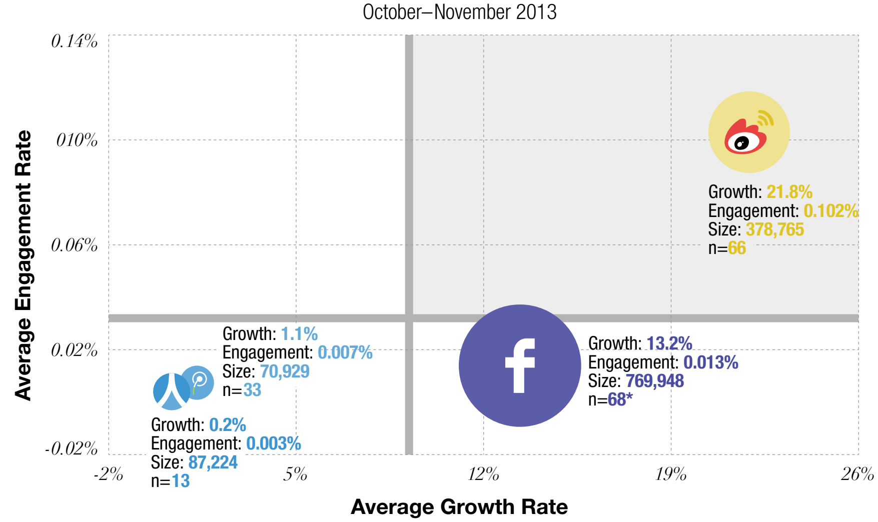
	Sina Weibo	Tencent Weibo	WeChat	Renren	Kaixin	Qzone	Douban	Meilishuo	Mogujie
% Inactive Since 2012	1%	21%	2%	28%	93%	80%	75%	40%	1%
*Social Sharing Rate	14.94%	8.00%	9.70%	4.73%	4.98%	14.53%	2.86%	1.03%	0.90%

*"Top China Social Sharing Websites in July 2013," China Internet Watch, September 4, 2013.

Average Page Size, Growth, and Fan Engagement

China Personal Care Brands Across All Social Media Platforms

October–November 2013



*U.S. equivalent in 2013 Digital IQ Index®: Personal Care
Note: Listerine Sina Weibo has been excluded in calculating average growth rate (21.8% vs. otherwise 621%)

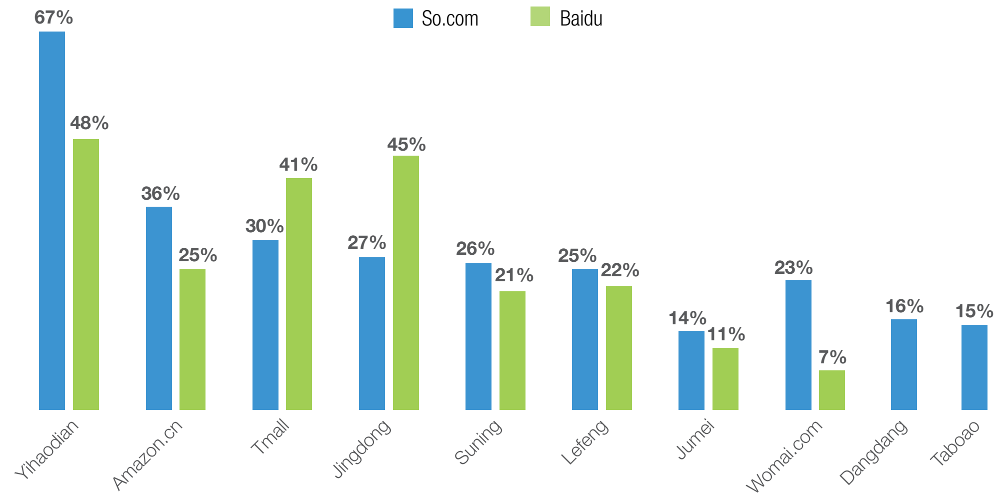
14. "China's Social-Media Boom," Cindy Chiu, Davis Liu, and Ari Silverman, McKinsey & Co., May 2012
15. "Alibaba Released Weibo for Taobao with Sina," China Internet Watch, August 5, 2013.
16. "Alibaba and Sina Weibo Jointly Explore Social E-commerce," iResearch, August 20, 2013.

Key Findings *Digital Marketing*

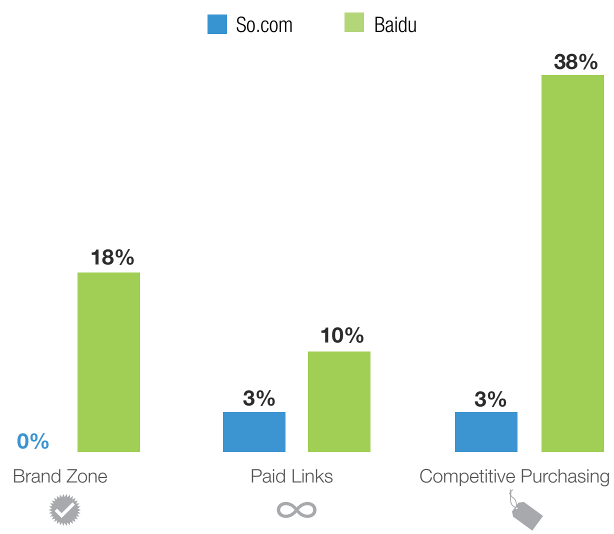
Paid Search

Personal Care brands are not aggressively engaging in paid search on Baidu or So.com. Just 18 percent of the brands purchase Brand Zones on Baidu, and 3 percent on So.com. One in ten brands promote paid links, and 38 percent purchase against competitors on Baidu. Liushen and L'Oréal Paris are the only brands engaging in paid search against their own brand terms as well as competitors on So.com. E-commerce giants have picked up the slack and control 85 percent of paid real estate for brand terms on Baidu and 96 percent on So.com. Among them, Walmart-owned Yihaodian is the most active e-tailer, buying against nearly half of brand term searches on Baidu and 67 percent on So.com.

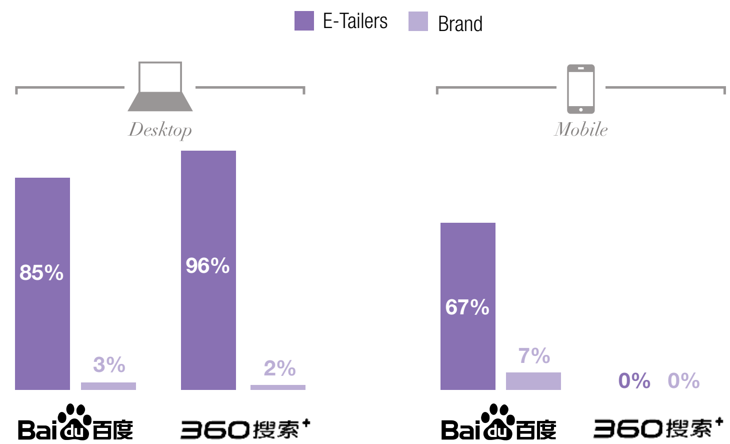
E-Tailers Engaging in Paid Search Against China Personal Care Brand Terms
Baidu vs. So.com
November 2013, n=73



Percentage of Brands Employing: Paid Search Tactics
Baidu vs. So.com
November 2013, n=73



Average Percentage of First Page Paid Search Real Estate
China Personal Care Brand Term Searches
November 2013, n=73



Key Findings *Mobile*

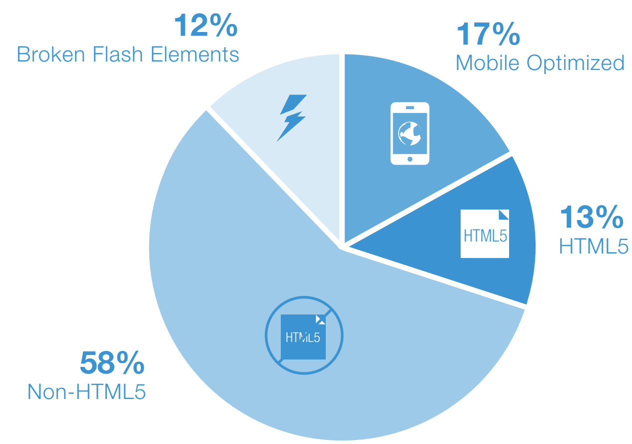
Mobile

Fifteen percent of mobile searches in China in 2012 were shopping-related, and 9 percent of those centered on Personal Care and Beauty.[17] However, only 17 percent of Personal Care brands have mobile-optimized sites. Half of mobile sites offer click-to-call customer service numbers, and a quarter provide one-click email for customer service. More than half of mobile sites direct traffic to e-tailers' mobile shopping platforms, most notably Tmall, for purchase.

Mobile shopping in China surged 142 percent year-over-year in Q3 2013.[18] However, investing in a mobile-optimized e-commerce brand site or mobile app can be costly. Optimizing Tmall shops for mobile and leveraging WeChat may be more effective mobile investments. On November 11, Single's Day, the equivalent of Cyber Monday in the U.S., mobile payments accounted for 32 percent of total sales on Taobao and Tmall, an 842 percent increase year-over-year.[19] Consumers in Beijing, Shanghai, Shenzhen, and Guangzhou placed 80,000 Single's Day orders through WeChat in collaboration with e-commerce site Yixun.[20]

Tmall allows brands to display scannable QR codes to access shops on Taobao mobile app. Seventy percent of Tmall brand shops use Weitao for marketing and CRM on mobile. Just nine Tmall brand shops encourage mobile shopping by promoting QR codes for mobile-exclusive offers. Forty-four percent of brands already use WeChat for sampling and contests, and 8 percent manage CRM and loyalty programs for driving fans to purchase. However, despite WeChat's new shopping policy, banning Tmall/Taobao links, 31 percent of brands still link to Tmall mobile for purchase.

Mobile Site Adoption
China Personal Care
November 2013, n=69



Olay's UGC photo campaign on niche B2C Beauty e-tailer Lefeng lets users customize gift boxes by submitting a photo to the e-tailer's WeChat.

On Tmall, local Hair Care brand Longliqi offers a dedicated mobile section on Tmall shop so fans can scan QR codes to access mobile site, shop on the Tmall mobile app, and receive mobile exclusive deals.

17. "Leveraging mobile's personal and complex potential requires deep understanding," Millward Brown.
18. "Mobile Shopping Leads the Future of E-commerce," iResearch, May 30, 2013.
19. "Chinese National E-Commerce Day breaks all records," Kyle Chi, 2013.
20. "WeChat Helps Tencent Make Over HK$637m in Single's Day Sales," Jeremy Blum, South China Morning Post, November 13, 2013.

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About L2

L2 is a think tank for digital innovation.

We are a membership organization that brings together thought leadership from academia and industry to drive digital marketing innovation.

RESEARCH

Digital IQ Index®: The definitive benchmark for online competence, Digital IQ Index® reports score brands against peers on more than 600 quantitative and qualitative data points, diagnosing their digital strengths and weaknesses.

L2 Collective®: Series of benchmarking reports designed to help member brands better understand resources, human capital, budgets, and priorities supporting digital strategies.

EVENTS

Forums: Big-picture thinking and game-changing innovations meet education and entertainment. The largest gatherings of prestige executives in North America.
300+ attendees

Clinics: Executive education in a classroom setting with a balance of theory, tactics, and case studies.
120–180 attendees

Working Lunches: Members-only lunches led by digital thought leaders and academics. Topic immersion in a relaxed environment that encourages open discussion.
40–80 attendees

CONSULTING

Advisory Services: L2 works with brands to garner greater return on investment in digital initiatives. Advisory work includes Digital Roadmaps, Social Media Strategy, and Organizational Strategy engagements.

MEMBERSHIP

For membership info and inquiries: membership@L2ThinkTank.com

Upcoming Events

LUNCH: FOCUS 2014
January 14, 2014 · Paris

BREAKFAST: FOCUS 2014
January 15, 2014 · London

LUNCH: RESEARCH BRIEFING
January 20, 2014 · Singapore

CLINIC: AMAZON
January 23, 2014 · New York City

BREAKFAST: LEADERSHIP BREAKFAST
February 4, 2014 · New York City

Upcoming Research

DIGITAL IQ INDEX® REPORTS:

Sportswear
Beauty: France
Food
Beer
Beauty: UK
Spirits
Beauty: Germany
Beauty: China

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EXCERPT from the Digital IQ Index®: **Personal Care** | China
To access the full report, contact **membership@L2ThinkTank.com**

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