



NEIWAI
VS
UBRAS

PROFILE: DIGITAL NATIVE BRANDS

DTC BRANDS IN CHINA

Perspectives on; global vs local DTCs and DNVBs (Digital Native Vertical Brands) in China, strategies for brand seeding, launch and growth.

3 - 9

NEIWAI VS UBRAS

NEIWAI and Ubras are among a growing set of digital-native brands in China. Both are emerging as leaders in the lingerie category. How do their strategies compare?

10 - 18

NEIWAI DEEP-DIVE

NEIWAI is a first-mover DNVB in the lingerie category in China. It has developed strong brand values and bravery, as well as formidable O2O model.

19 - 34

UBRAS DEEP-DIVE

Ubras is the fast-follower, when compared with NEIWAI. Its agility with the newest digital channels (livestreaming, RED) has allowed it to catch up quickly.

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SUMMARY OF ANALYSIS

What general learnings can we take from the success of each brand in this analysis?

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TOTEM'S BRAND FRAMEWORK

Introducing Totem's Brand Growth Framework, developed as an outcome of our global research, data & studies into how 'transcendent' brands grow - both DTC & Traditional.

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BRAND PROFILES: NEIWAI VS UBRAS

Understanding digital-first (DTC/DNVB) brand building in China, through the lens of Totem's Brand Growth Template.

ABOUT TOTEM

For more on China market growth strategies, DTC and brand transformation insights:

www.talktototem.com/dtc-insights

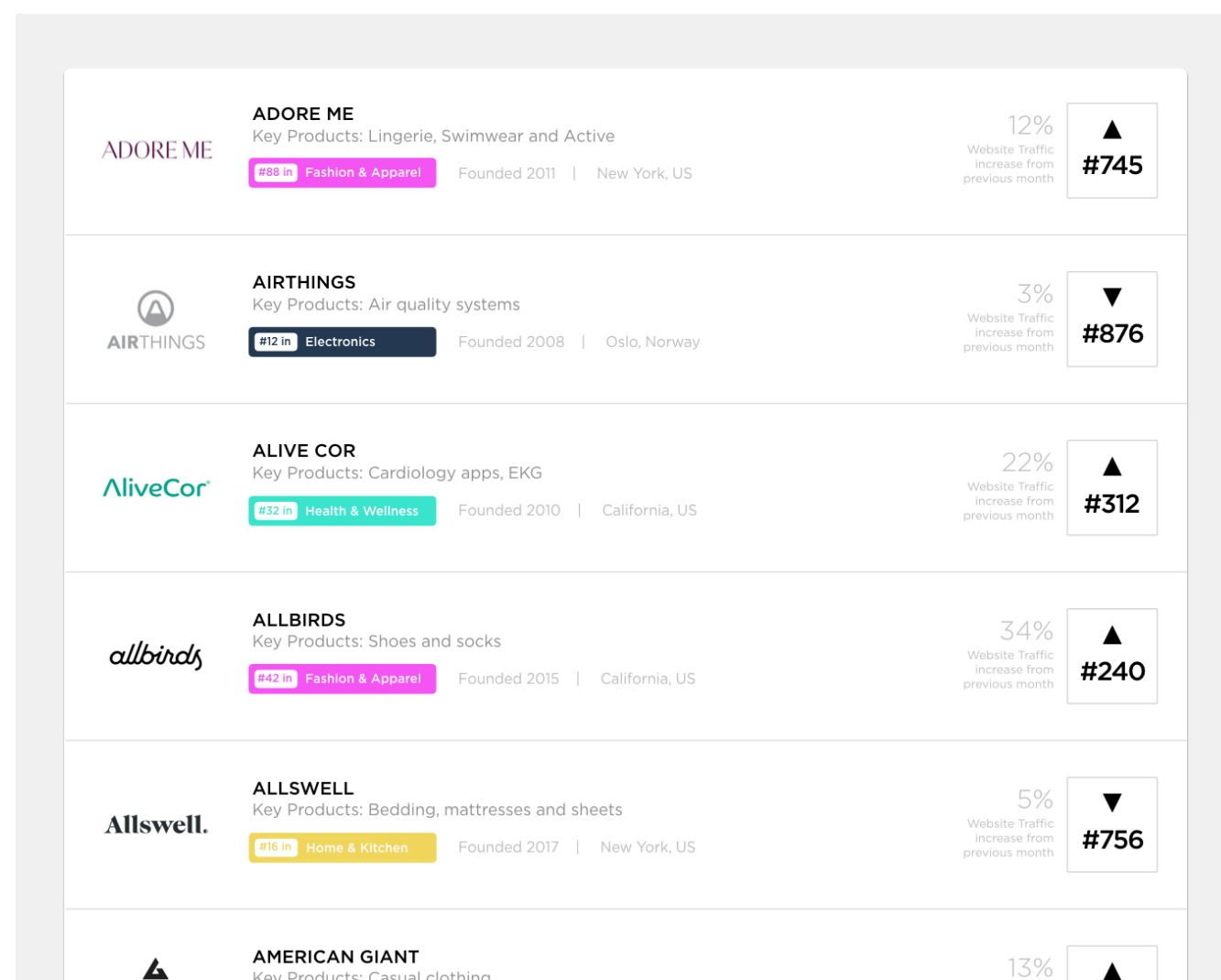
www.talktototem.com/china-insights

DIGITAL NATIVE BRANDS

This is the first in a series of reports by Totem that evaluates DTC (digital native) brands in China, both domestic and foreign.

These reports on digital native brands in China are built upon the research that Totem has compiled about global DTC brands.

Through these reports, we hope that it is possible to gain further insight into how brands grow.



Totem's Global Database of 1,000+ DTC brands

LEARNING FROM CHINA

All marketing in China is digital first.

In the absence of tradition (and traditional channels), brands have necessarily focused on digital. Given that most marketing is digital, brands in China have also pushed further and deeper into experimenting with new tactics. Added to this, China has a unique set of channels and nearly ubiquitous digital payments. So, if you want to glimpse the future of global marketing, have a look at what's happening in China.

NEIWAI VS UBRAS

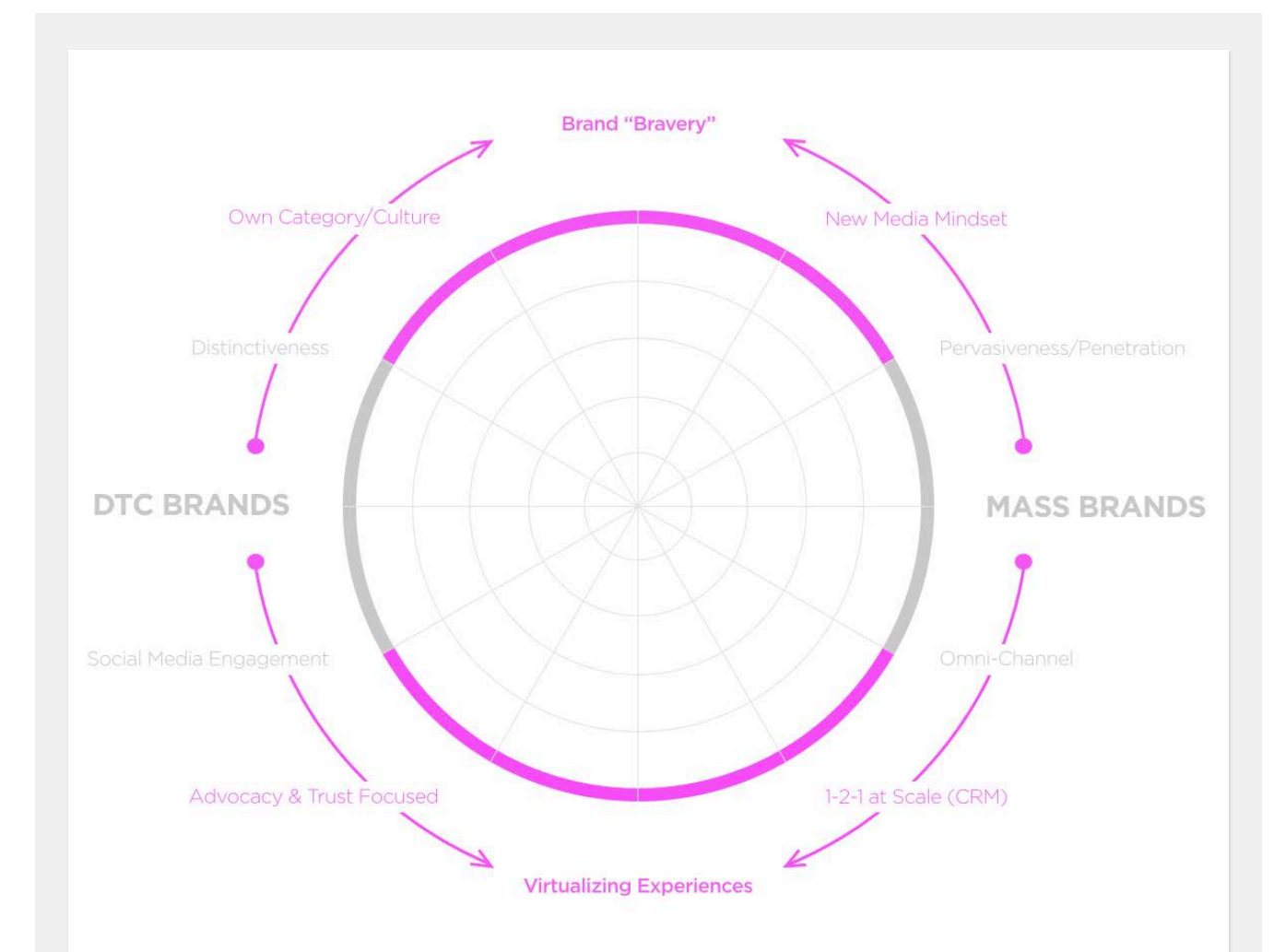
Originally, we planned to focus this report on NEIWAI. NEIWAI has been one of the more interesting brand growth stories in China over the past 5-10 years, attracting a huge volume of investment capital.

However, based on the explosive growth of Ubras in 2020, we had to include them in the report. So, this report becomes more of a comparative study of two similar brands with distinct brand building frameworks.

TOTEM'S BRAND GROWTH FRAMEWORK

From our analysis of both global and Chinese digital native brands, Totem has developed a Brand Growth Framework that serves as a template for planning brand transformation/growth.

For details about Totem's Brand Growth Framework please see the end of this report.



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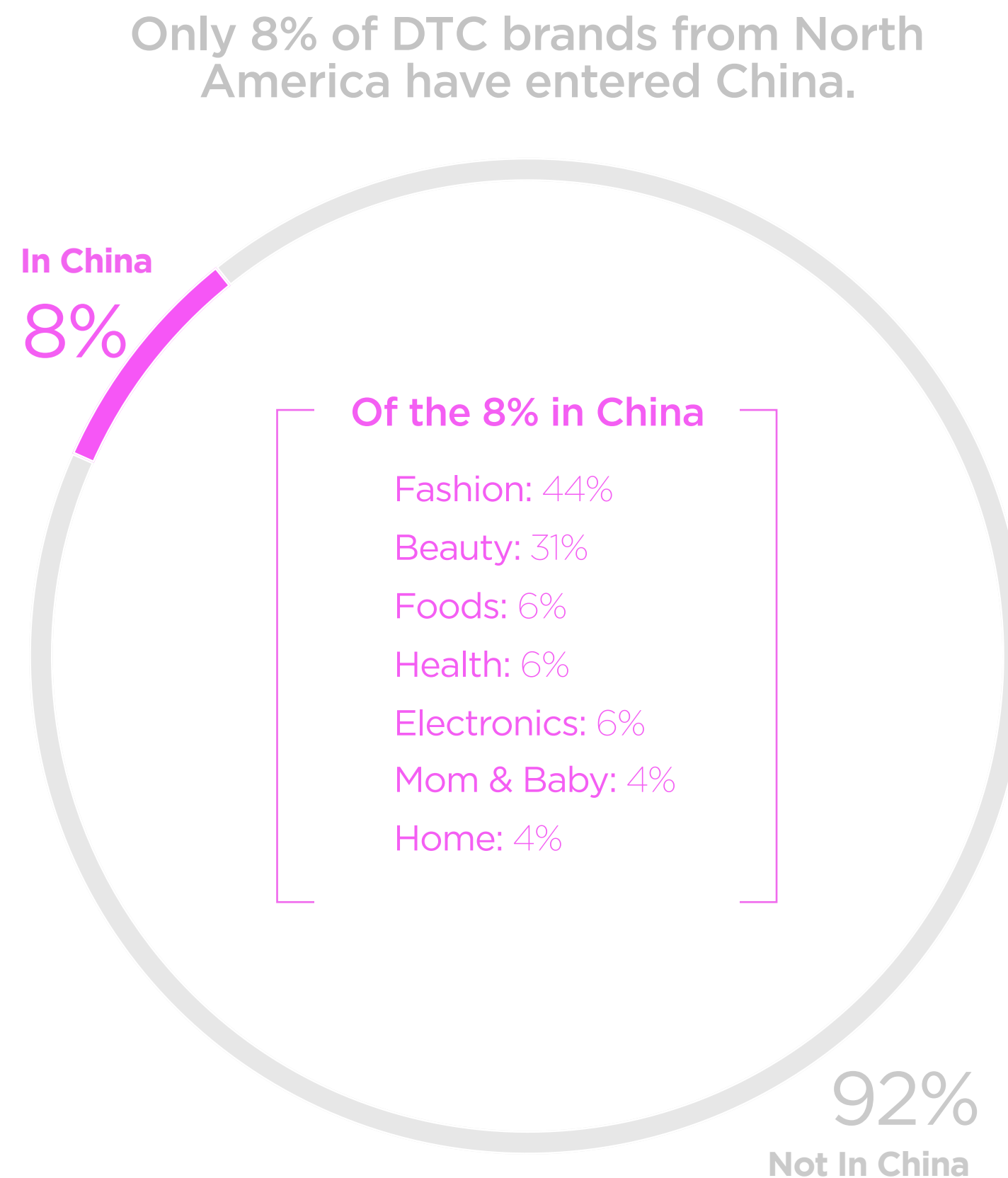
DIGITAL AND DIRECT MARKETING RULE IN CHINA

The 'disruptive' strategies that DTCs in the West have been using to gain share over traditional brands, are the staple tactics for winning in China's predominantly digital marketing ecosystem.

GLOBAL VS LOCAL DTCS?

Our research shows that only a very small percent of Global DTCs have entered the market. Meanwhile, there has been steady growth in local DTC/DNVB brands which have been modeled on (and are often out innovating) their global counterparts.

Alibaba (Tmall) and other platforms in China are putting a lot of focus on newer, growth brands. Alibaba has a program to incubate/accelerate global DTC brands. Tmall is also supporting the growth of local "Treasure Brands." Collectively, 357 global/local growth brands became top sellers at Double 11 2020, versus only nine such brands in 2019.



Source: Totem Global DTC Database

A SURGE OF NEW, CHINESE DTC BRANDS IN 2020

Globalization took a major step backwards in 2020, with the flow of goods put under massive pressure from Covid. As a result, there was a strong move to localization - and a surge in growth of local DTC brands:

1. Factories with spare capacity and excess inventory, moved to launch their own brands and supply local DTCs - advancing a trend toward more local consumer-to-manufacture (C2M) connections.
2. Consumers in China discovered an array of new, local products (many of which come from the same factories as famous global brands) at prices lower than global players

At the same time, China's consumer gravity is shifting toward lower-tier cities. Strong growth of Pinduoduo and Kuaishou offer compelling evidence of this shift. The growth of lower tier markets favor Chinese DTCs in the short-term.

The defining factors for success of local DTCs will be in their ability to build distinct brand identity - and avoid price-competition traps.

MODE ONE: TMALL/TAOBAO

ADVERTISING-TO-COMMERCE

The early growth of DTC/DNVBs in China was squarely focused on Taobao and Tmall, with conversion organized around conventional “funnel” strategies; advertise to create awareness, convert traffic on Tmall/Taobao. Alibaba has built its ecosystem in support of this model, with systems to drive traffic volume to branded destinations (flagship stores).



Three Squirrels is representative of the first mode of local, digital native brands in China.

MODE TWO: WECHAT

COMMUNITY-TO-COMMERCE

With WeChat as THE hot channel, starting in 2011, business models shifted toward; the development of multi-level distributors, the use of private traffic and a range of other user-get-user tactics. The goals in this model are to build a large follower base, and; (1)to convert the followers to sales, (2)encourage repeat purchase and (3)incentivize WOM referrals.



OneLeaf represents 'Mode Two' with a marketing/sales model similar to Amway.

MODE THREE: DOUYIN/RED

CONTENT-TO-COMMERCE

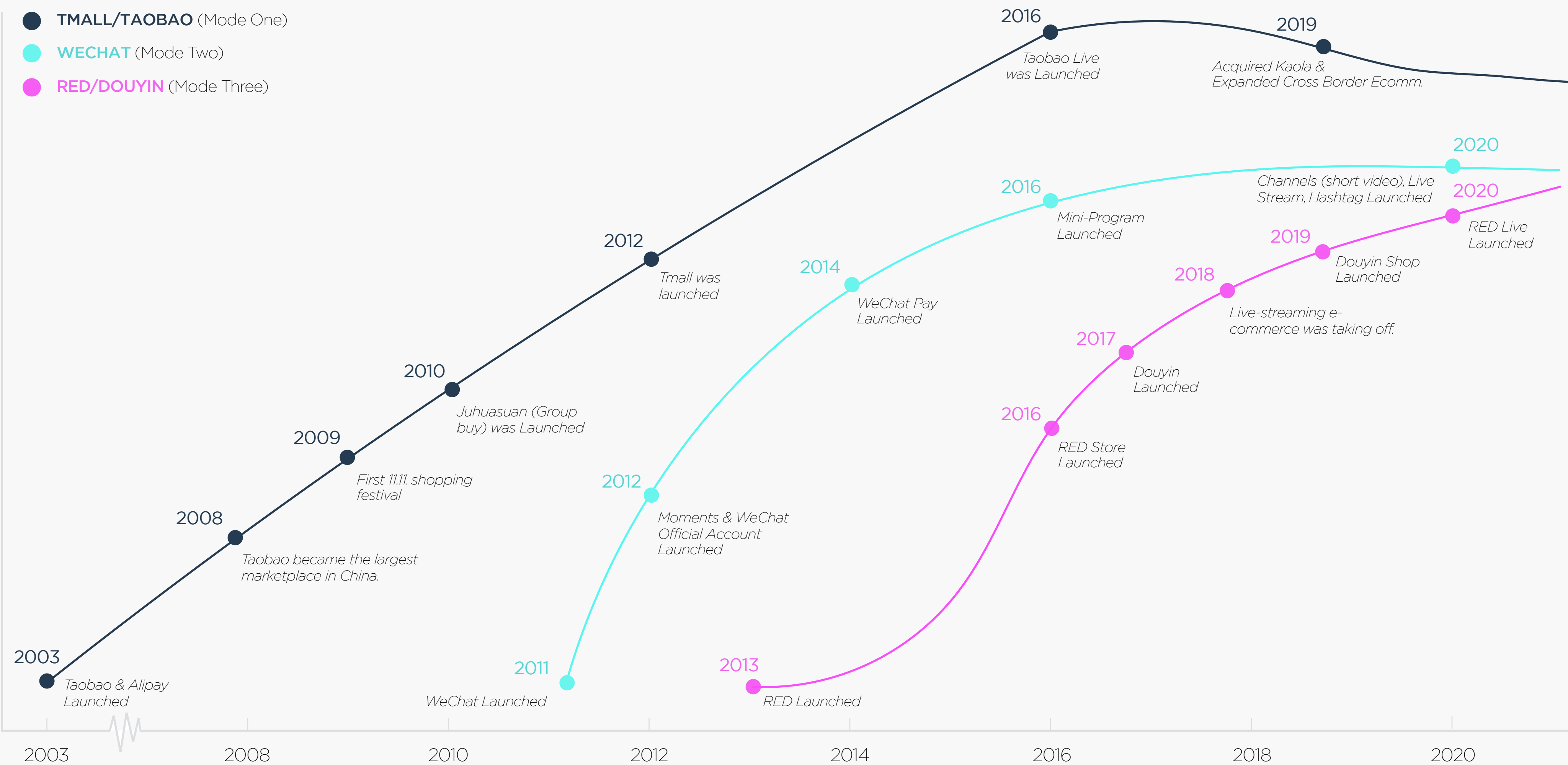
The current mode of digital growth is defined less by a specific channel and more by a range of tactics which can be best observed by what's happening on RED and Douyin, where brands are building high-levels of attention and then converting that attention in the moment. Livestream selling with KOLs is one of the notable tactics of “Mode Three.”



Perfect Diary has applied 'Mode Three' growth strategies very effectively.

SCALE OF ECOMMERCE

- **TMALL/TAOBAO** (Mode One)
- **WECHAT** (Mode Two)
- **RED/DOUYIN** (Mode Three)

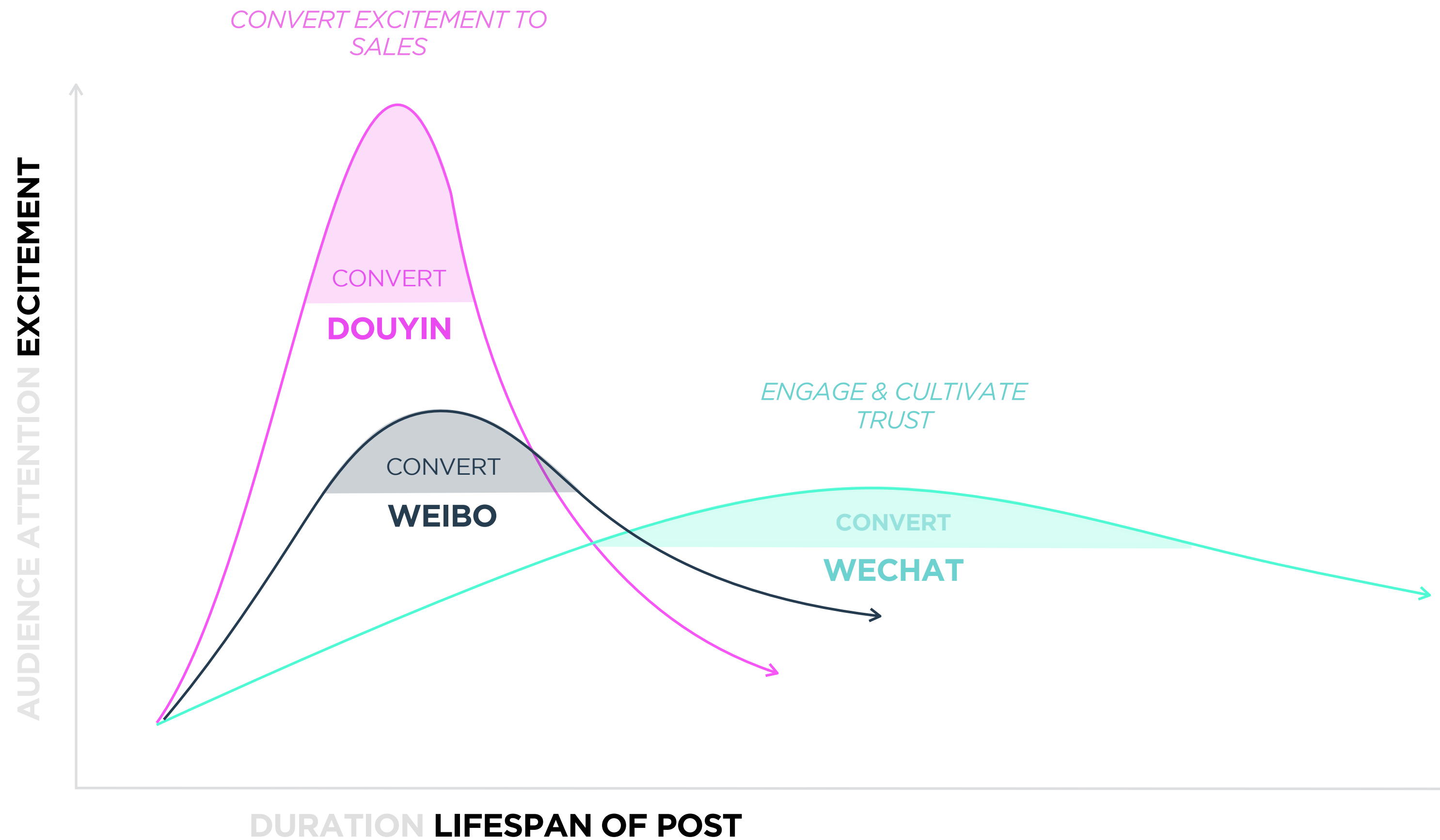


ADVERTISING-TO-COMMERCE

COMMUNITY-TO-COMMERCE

CONTENT-TO-COMMERCE





CULTIVATING SALES VS TRUST

Some channels - such as DOUYIN - amplify content quickly, creating rapid attention and excitement, with attention dropping as quickly as it rose.

Other channels - such as WeChat - are less good at creating peak moments of excitement BUT are good for creating discussions and service which build trust.

DOUYIN: Converts excitement to action. It's great at creating rapid awareness and supporting impulse purchases (fashion, beauty, hobbies...). *Douyin is "Mode Three."*

WECHAT: Well designed for building trust and cultivating audiences and WOM. It's better for creating more thoughtful engagement and most effective for supporting higher-involvement purchases (luxury, travel, home/baby, IT...). *WeChat is "Mode Two."*

WEIBO: It's running the risk of being overshadowed by Douyin and WeChat, but is effective in supports discovery and is highly linked to other channels (Tmall) and to search/linking. It's a hub to see what people as saying before purchasing on Tmall. *Weibo is most aligned to "Mode One."*

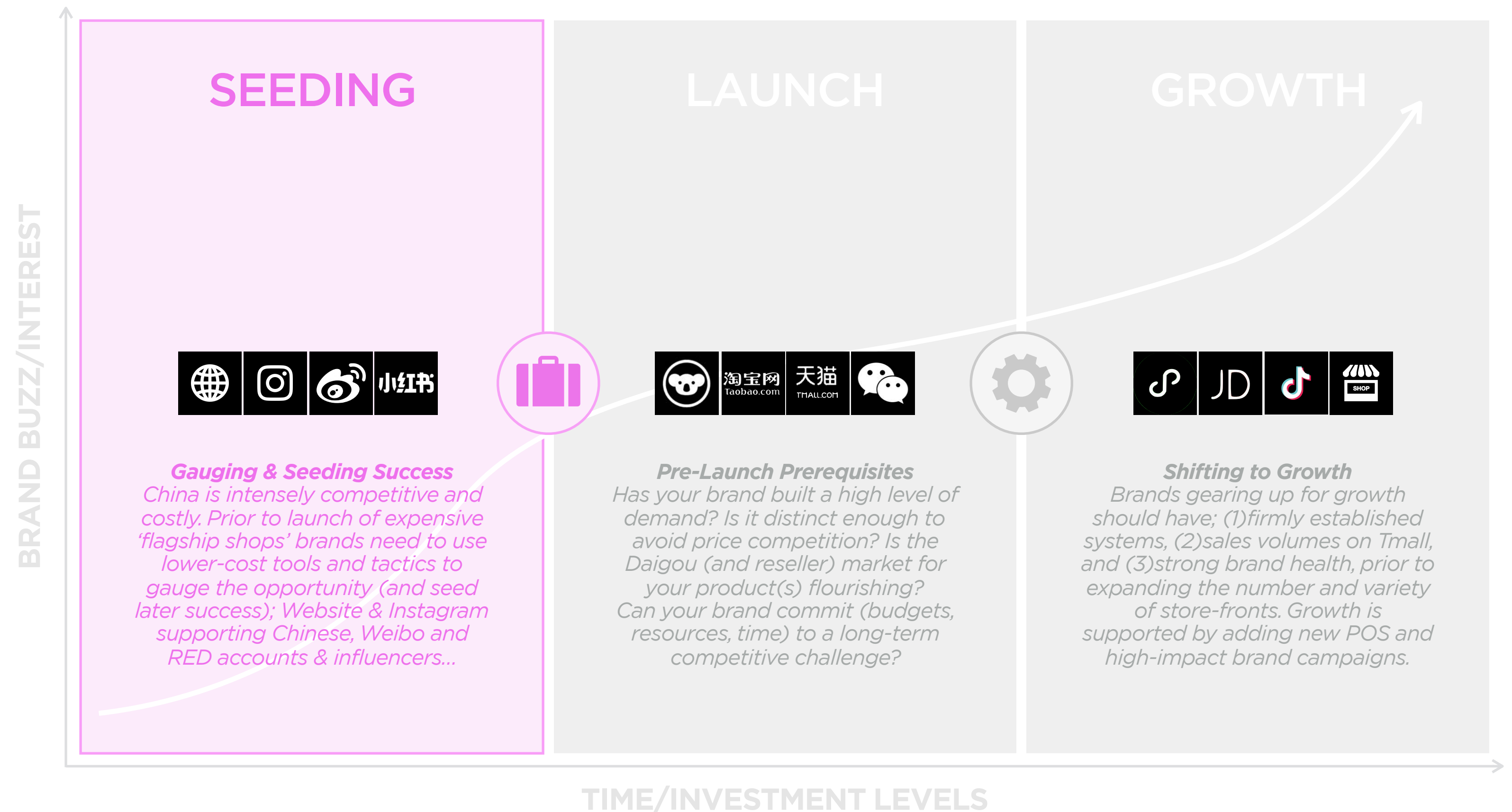
GLOBAL BRANDS MUST FOCUS ON 'SEEDING' FIRST

Chinese DTC/DNVBs generally spend very little time 'seeding' the market before making the larger commitments to scaling - such as investing in the costly infrastructures of WeChat and flagship stores on Tmall, etc. For local brands, China IS their only market, they 'are all in' and they hold nothing back.

For Global brands, China is, at best the second most important market (*after home*). It's also a market with unfamiliar routines, rules and players, which leaves most at a disadvantage.

Before launch, Global brands should; (1) Setup a low-cost programs to seed interest with Chinese audiences (in China and overseas), (2) Gauge demand and recalibrate brand messaging/positioning (to be distinctive and relevant in China), (3) Stimulate strong buzz, and (4) Support demand and fulfillment (thru the array of cross-border intermediaries (eg. Daigou, Haitao, Tmall Global)).

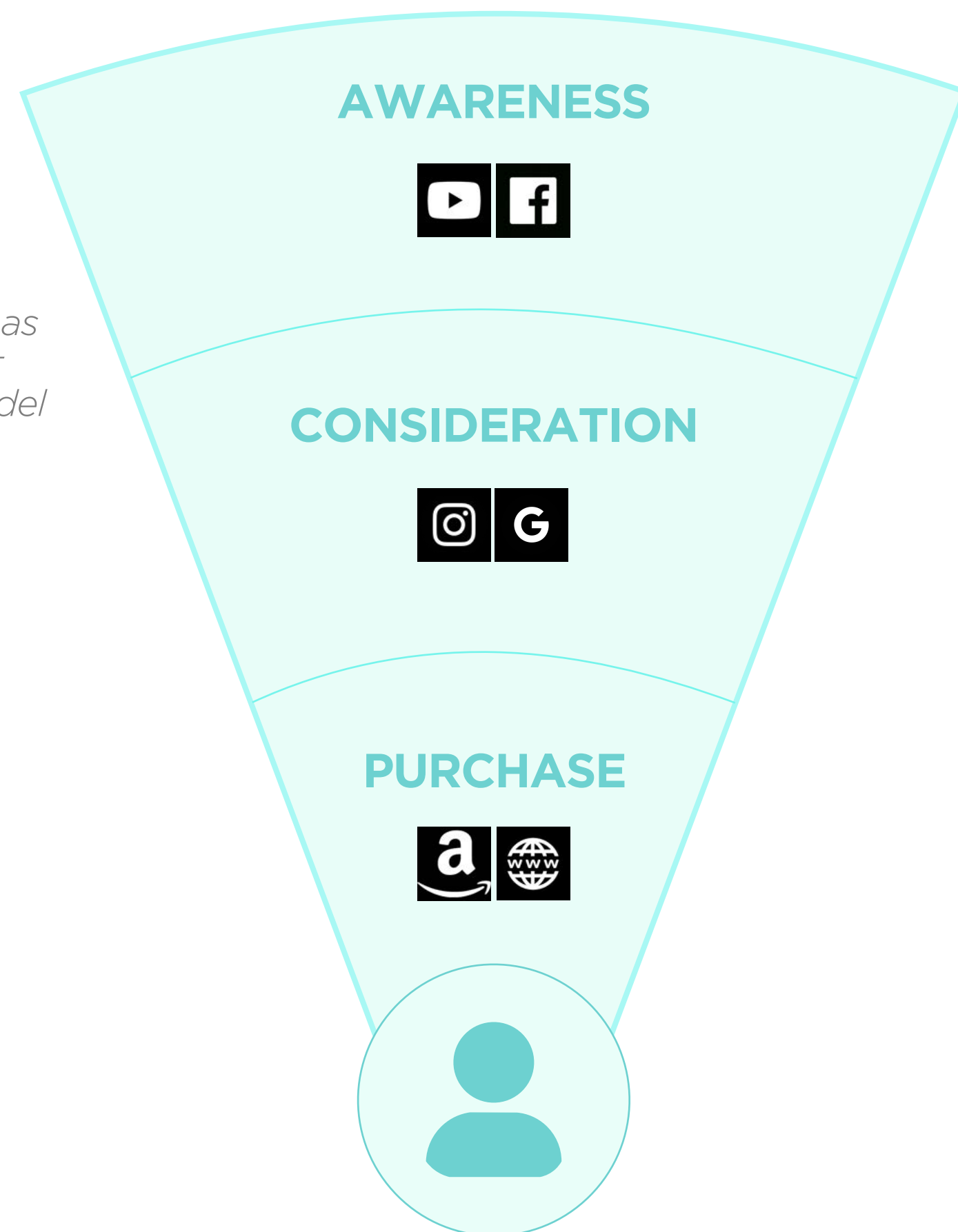
Global companies should only move forward with launch if/when there is a strong formula in place, with clear brand positioning, solid messaging routines, persistent demand, AND, critically, a clear commitment from HQ to support a long-term investment in China.



GLOBAL

CUSTOMER JOURNEYS
ACROSS CHANNELS

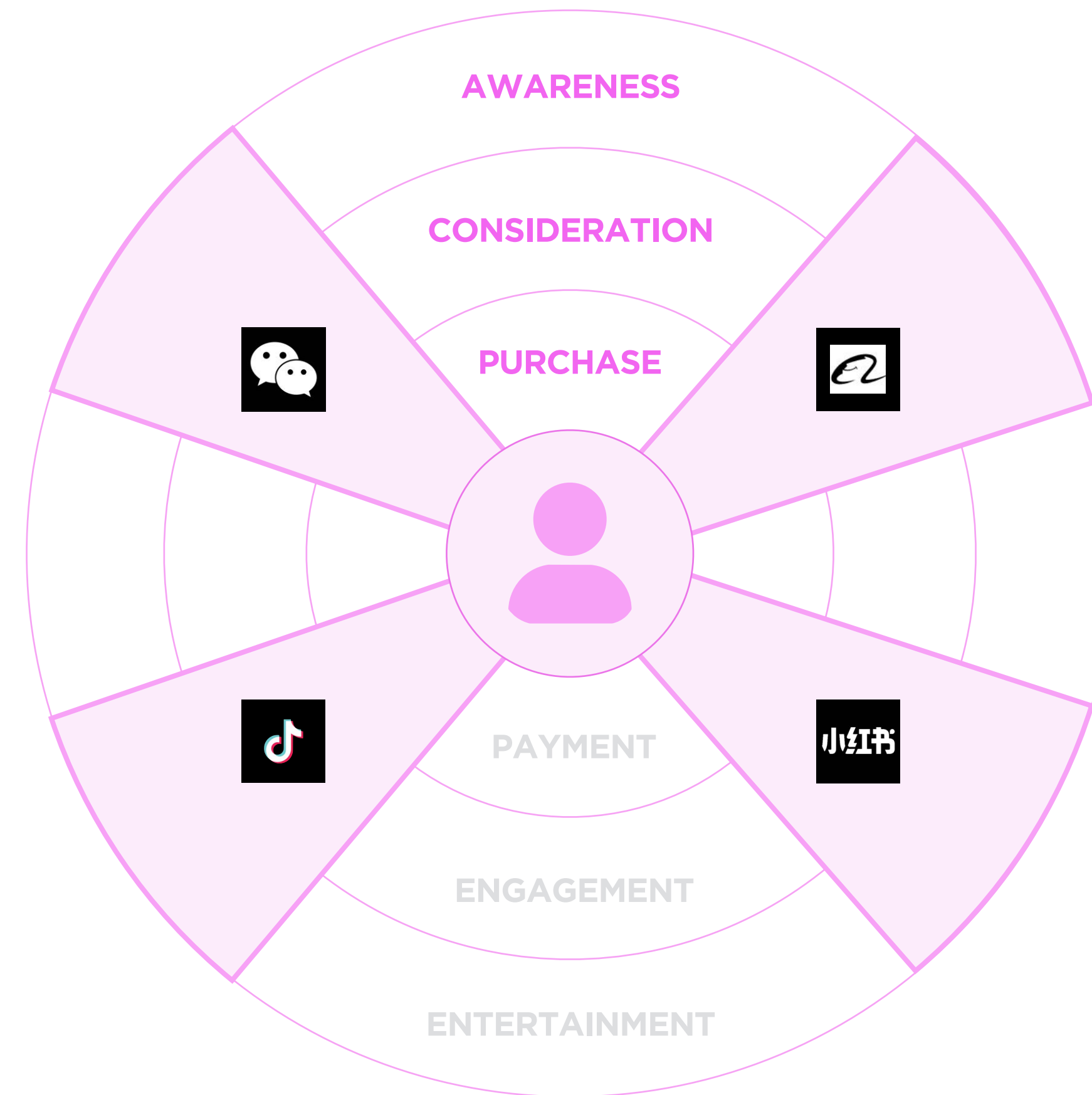
**Advertising as
predominant
business model*



CHINA

'SUPER APPS' FULLY
ENCIRCLE AUDIENCES

**Digital platforms
prioritize eCommerce
business model*



ACROSS ALL CATEGORIES, THERE ARE
A GROWING NUMBER OF DIGITAL
NATIVE, CHINESE BRANDS.

Insight: Brands launched only a few years apart can have very different marketing playbooks and tactics - even if they are in the same category.

NEIWAI and Ubras appear to be very similar. Unless you dig into the details of who they are targeting and which channels they favor, it would be difficult to tell the two brands apart.

The detailed stories of these brands reveal several interesting insights about growth strategy.



SIMILAR PRODUCTS, DIFFERENT STRATEGIES.

Comparing Ubras and NEIWAI brand growth profiles

UBRAS IS YOUNGER, FASTER

Only three years old, Ubras took off in 2020. VC money in 2018 has permitted them to pursue an aggressive digital marketing strategy.

Ubras has eclipsed NEIWAI on "younger" channels/tactics such as RED, Douyin and livestream selling. Its growth profile is digital focused.

With only a handful of offline shops, Ubras is still significantly smaller than NEIWAI with a total sales volume that is likely 6-8 times lower than NEIWAI in sum.



NEIWAI IS MATURE, INCUMBENT

Started in 2012, NEIWAI is the first mover in the market, credited with carving out a new category for simple, elegant, mature and comfortable lingerie.

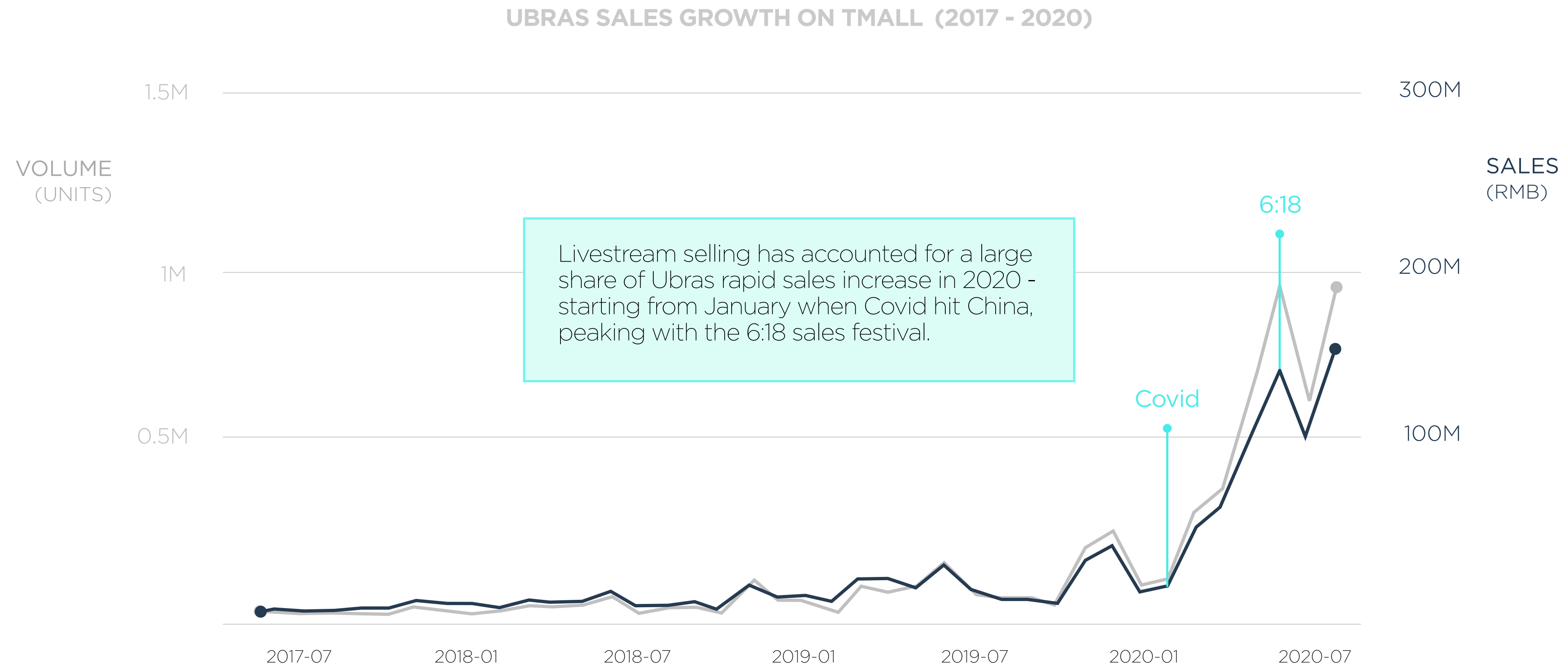
It had slow, steady growth from 2012-15, after which VC investments fueled much more rapid expansion.

Despite being a digital-first brand, they currently have a prominent offline presence (with ~80 shops), a more mature audience and a more traditional marketing profile.

When comparing NEIWAI and Ubras, product design, quality and pricing are very similar, so the analysis comes down to positioning, branding, messaging and marketing strategy.

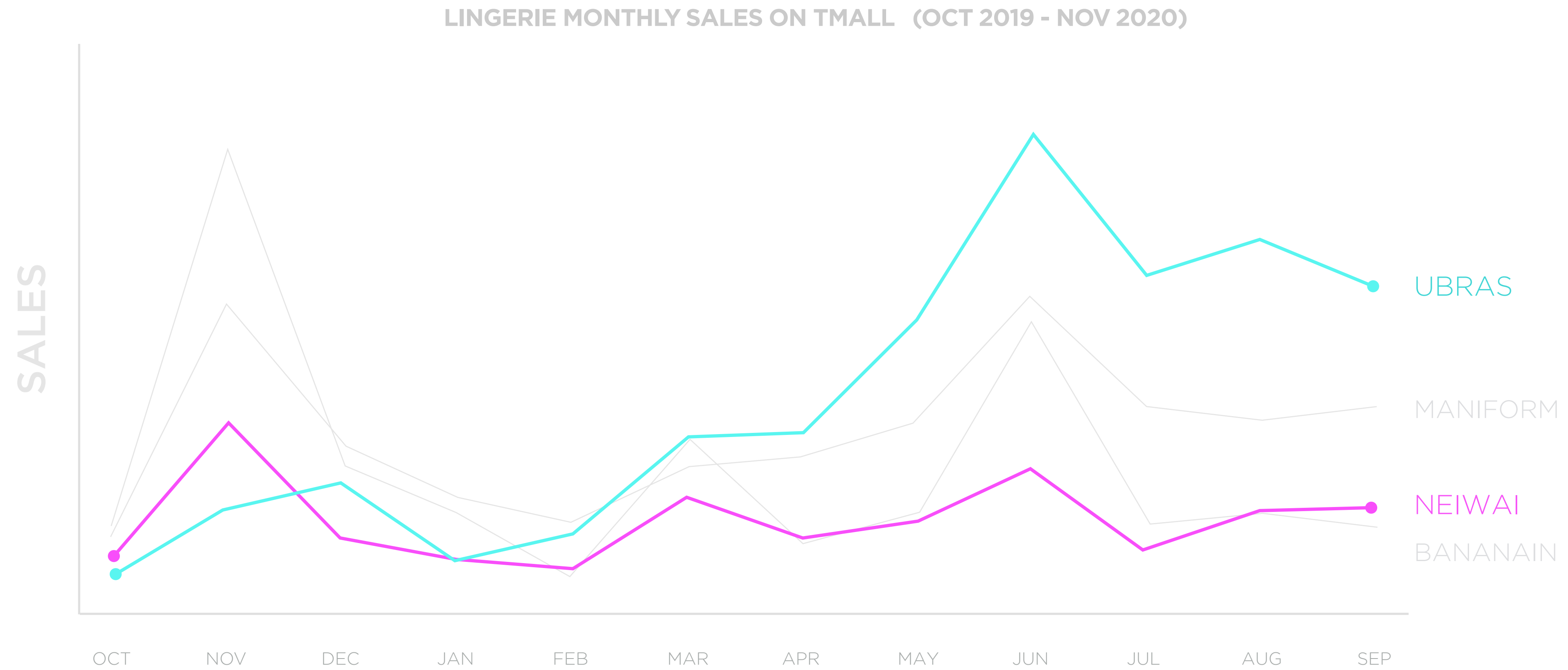
UBRAS SALES HAVE BEEN METEORIC

It has exploded in 2020 as a result of aggressive digital marketing



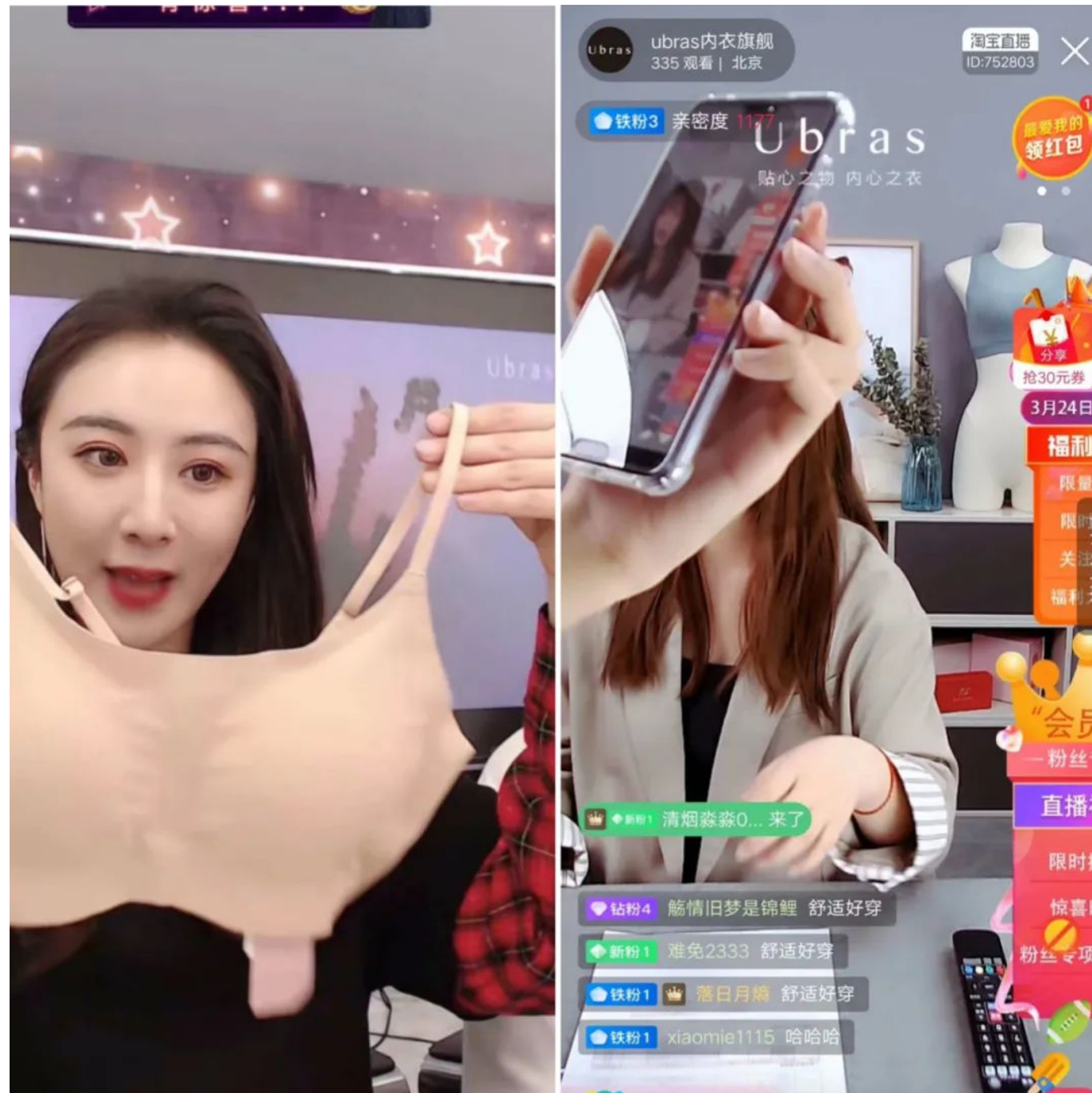
UBRAS ECLIPSED NEIWAI'S ONLINE SALES

Ubras' digital focus paid off, where NEIWAI was more geared to offline sales



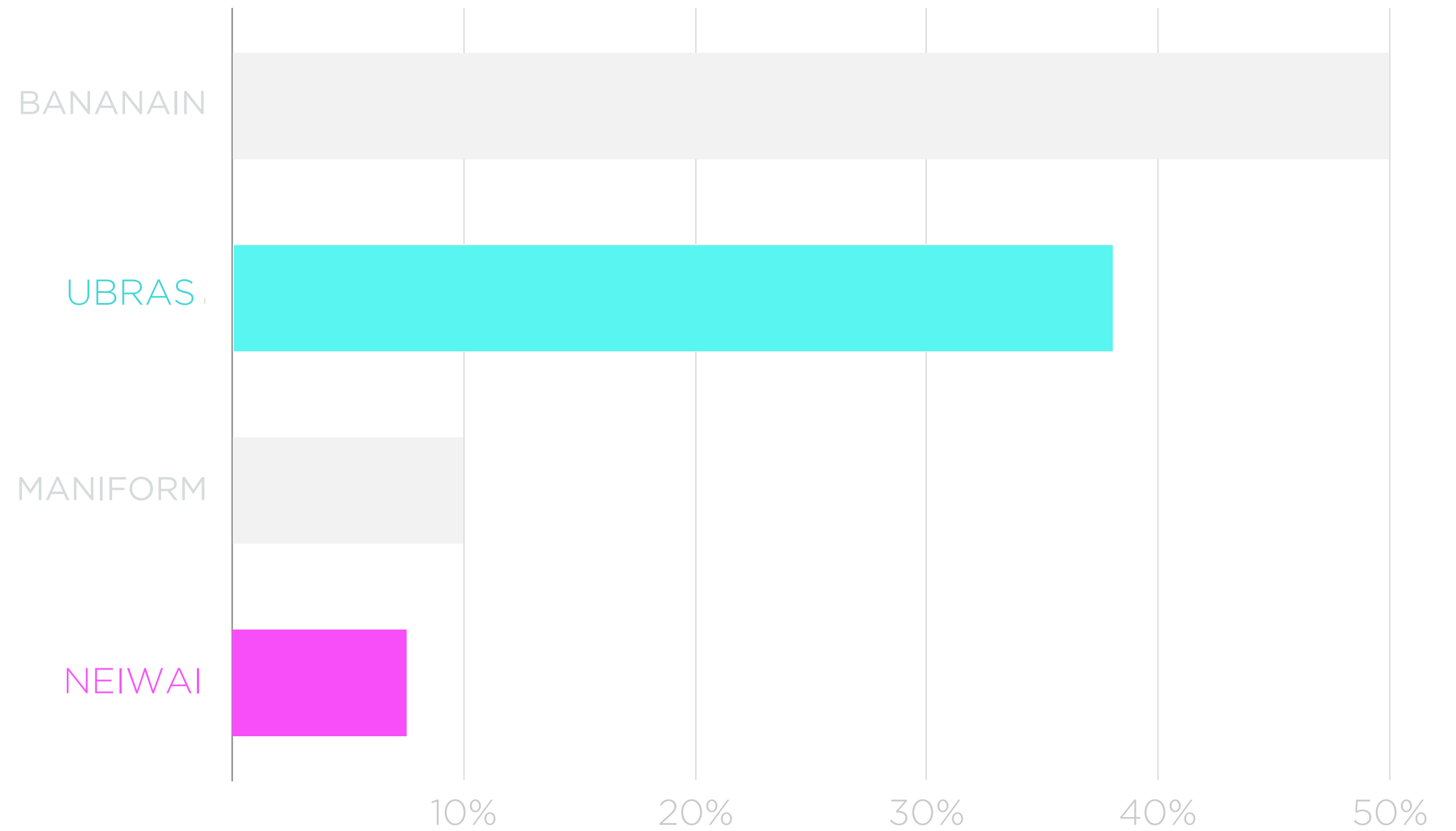
LIVESTREAM SALES PROPELLED SALES GROWTH

Ubras has a four-fold lead over NEIWAI with livestream sales



Ubras has made aggressive moves into livestreaming using notable influencers (KOLs) to drive sales.

LIVESTREAMING AS PERCENT OF SALES - DOUBLE 11, 2020
(MAJOR WIRELESS BRA BRANDS ON TMALL)




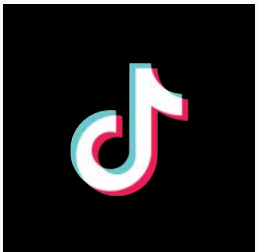


DIGITAL PRESENCE OVERVIEW

Ubras is over-investing in digital, gaining an advantage over NEIWAI

NEIWAI

Ubras

	TMALL	RED	WEIBO	DOUYIN
				
	<i>Followers</i> <i>Rating</i>	<i>Followers</i> <i>Likes & "Favs"</i>	<i>Followers</i> <i>Posts</i>	<i>Followers</i> <i>Views</i>
NEIWAI	2.91M 4.5 *	24.8k 10.3k	30k 3,232	441 910k
Ubras	3.17M 4.0 *	75k 123.9k	50k 2,337	8,400 1.5M

NEIWAI does have higher product ratings, which makes Ubras' strong digital sales performance all the more impressive.

Ubras' advantages on RED and Douyin (with younger consumers) are particularly notable. In addition to being "younger" channels, RED and Douyin are also more geared toward product discovery and WOM. Ubras has built a highly effective engine on RED, where it encourages reviews from new purchasers to help inform would-be purchasers to commit, thereby converting attention-to-sales rapidly and with less friction.

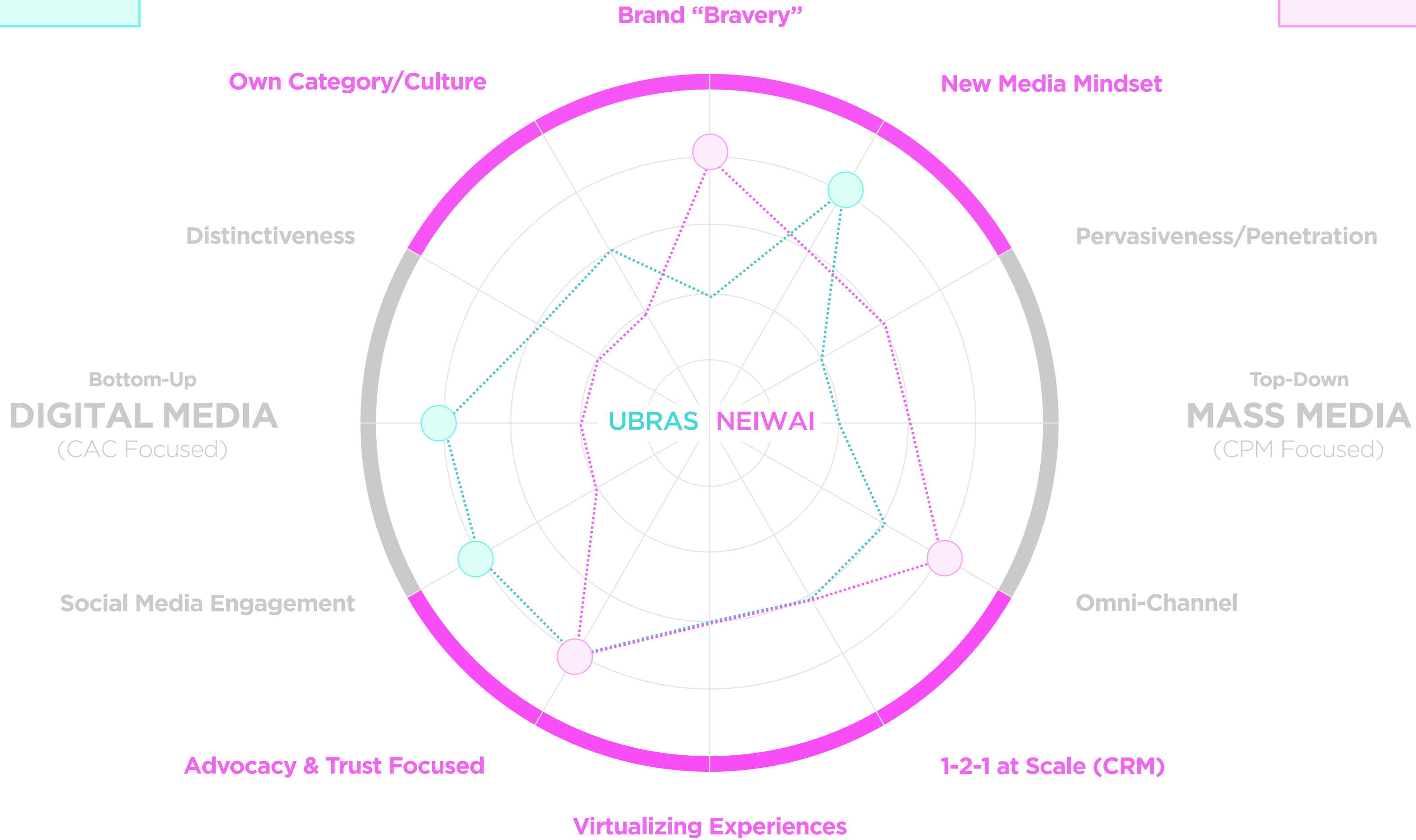
GROWTH BRANDS

Ubras has a more digital-first brand profile, with a firm focus on; (1)digital acquisition, (2)social media engagement, and (3)new media/ tactics (most notably; livestreaming).

NEIWAI has a more traditional brand profile, focused more on; (1)top-down advertising, (2)a greater focus on physical/offline retail, and (3)more emotional, 'brave' branding.

DIRECT-TO-CONSUMER

TRADITIONAL BRANDS



GROWTH BRANDS

Own Category/Culture

Brand has moved beyond category distinctiveness to creating/defining a (new) category. Does the brand "own" a space/domain and act as the only choice to get a job done? Is it viewed as hallmark of a culture (tribe)?

Brand "Bravery"

Brands that are brave venture big gains with bold, compelling creative (campaigns, brand collaborations, stunts, endorsements). Risks of "high-reward" actions are mitigated when brands have loyal audiences.

New Media Mindset

Brand has a share of media investment dedicated to new, experimental, early-stage social/apps (TikTok, Snapchat), Gaming Co-ops, and other yet-to-be-proven media (e.g., AR/VR).

Distinctiveness

Brand is notable from others in category - "remarkable" in view of audiences. Distinctiveness in category includes product features/design, brand identity, audience niche or a combination of those attributes.

Bottom-Up

DIGITAL MEDIA

(CAC Focused)

Social Media Engagement

Brand creates content that is engagement focused (drives "consideration"). Social media team is highly responsive and conversational: they are speed-, authenticity- and reciprocity-driven.

Advocacy & Trust Focused

Deep connections with customers (product, service quality, attention to detail) are usually indicated by high engagement through all touchpoints. Brand has high percentage of staff dedicated to customer service and generous returns/refunds (and customer delight) routines.

Virtualizing Experiences

Brand has created digital online experiences, which mirror (if not improve upon) the offline experiences of the brand (e.g., AR/VR, live video customer service/sales/education, haptic experiences).

Pervasiveness/Penetration

Brand that has a very large scale in terms of media reach and penetration (usually as a result of large media budgets and use of traditional mass media), allowing it to have presence with audiences at scale.

Top-Down

MASS MEDIA

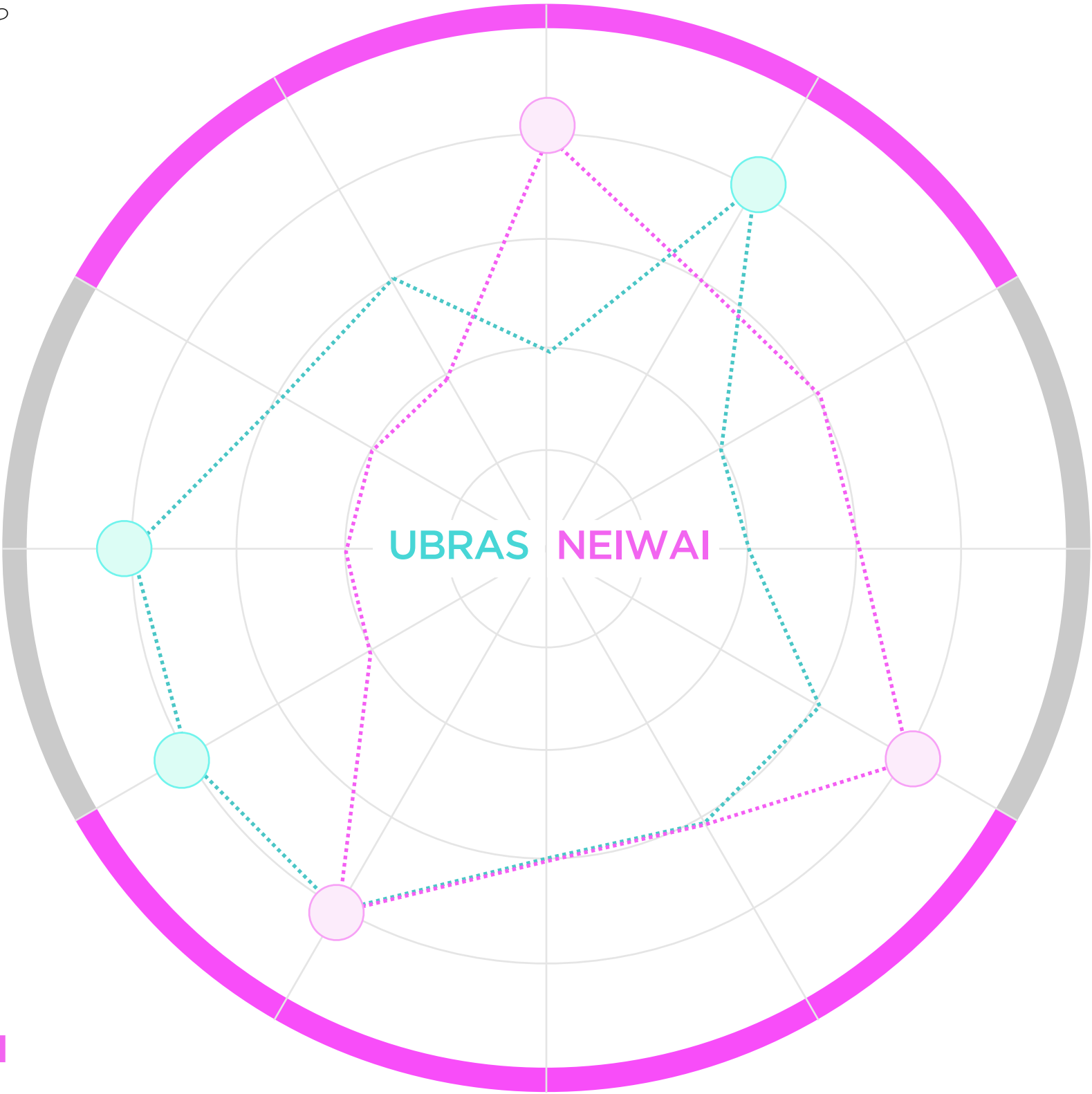
(CPM Focused)

Omni-Channel

Company has full array of sales and communications channels (online and offline). It is widely accessible for purchase anytime, anywhere. It has systems in place to support purchases between channels.

1-2-1 at Scale (CRM)

Systems are in place (offline and online) to communicate with individual audiences (and segments) at scale (e.g., bots, customer AI, messaging systems and customer service, subscriptions). It uses customer insights to tailor communications and personalize responses.



DIRECT-TO-CONSUMER

TRADITIONAL BRANDS

NEIWAI

NEIWAI

DTC BRAND PROFILE



INTRO.

NEIWAI

Launched in 2012 in Shanghai, NEIWAI was founded with an aspiration to create lingerie that frees both body and mind. Translated as “Inside, outside,” NEIWAI has taken the mission of promoting female empowerment and self-acceptance.

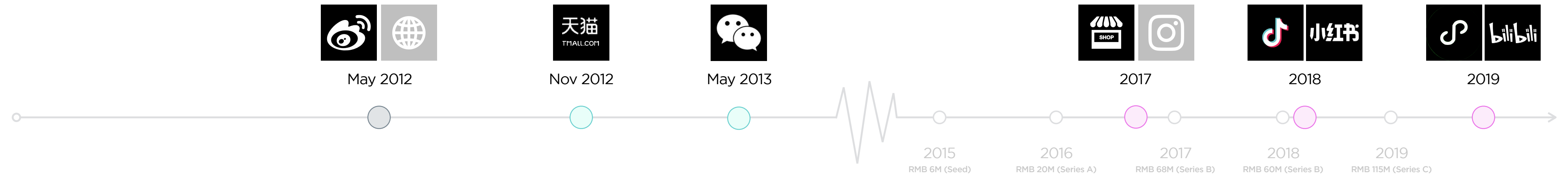
Comfort, simplicity and inclusiveness are key brand/product aims for NEIWAI. The brand focuses on making meaningful designs that optimize the physical experience, create a tacit and warm connection between people and clothing, helping to meet the functional needs of a wider range of people, with diverse body shapes, and encourage more women to understand and explore their inner self and outer world. “Everything is fine, inside and out.”



SEEDING

LAUNCH

GROWTH



2012: Set up Official Weibo Accounts to build momentum with audiences.

Also started with its own Chinese (.cn) website as a branding tool, but phased out once Tmall store was established.

To differentiate itself, NEIWAI chose to bring comfort to the female body and mind through simplicity; it defined lingerie as a method for self-expression.

2012 - Launched Tmall Flagship store. Built funnel/conversion path from social to Tmall.

2015 - Wireless bra became popular as millennials and Gen Z attach more importance to comfort and self-awareness.

2016 - NEIWAI sales up by 400%. The "Pure Comfort" series became the best seller. Opened a showroom at its office, for customers to experience the products.

To fuel brand growth, NEIWAI has focused on building its community on social media through content marketing. It has expanded aggressively with physical stores offline.

2017 - Reached 100,000 daily transactions on Double 11. #8 in the female intimates category on Tmall. Opened four physical stores.

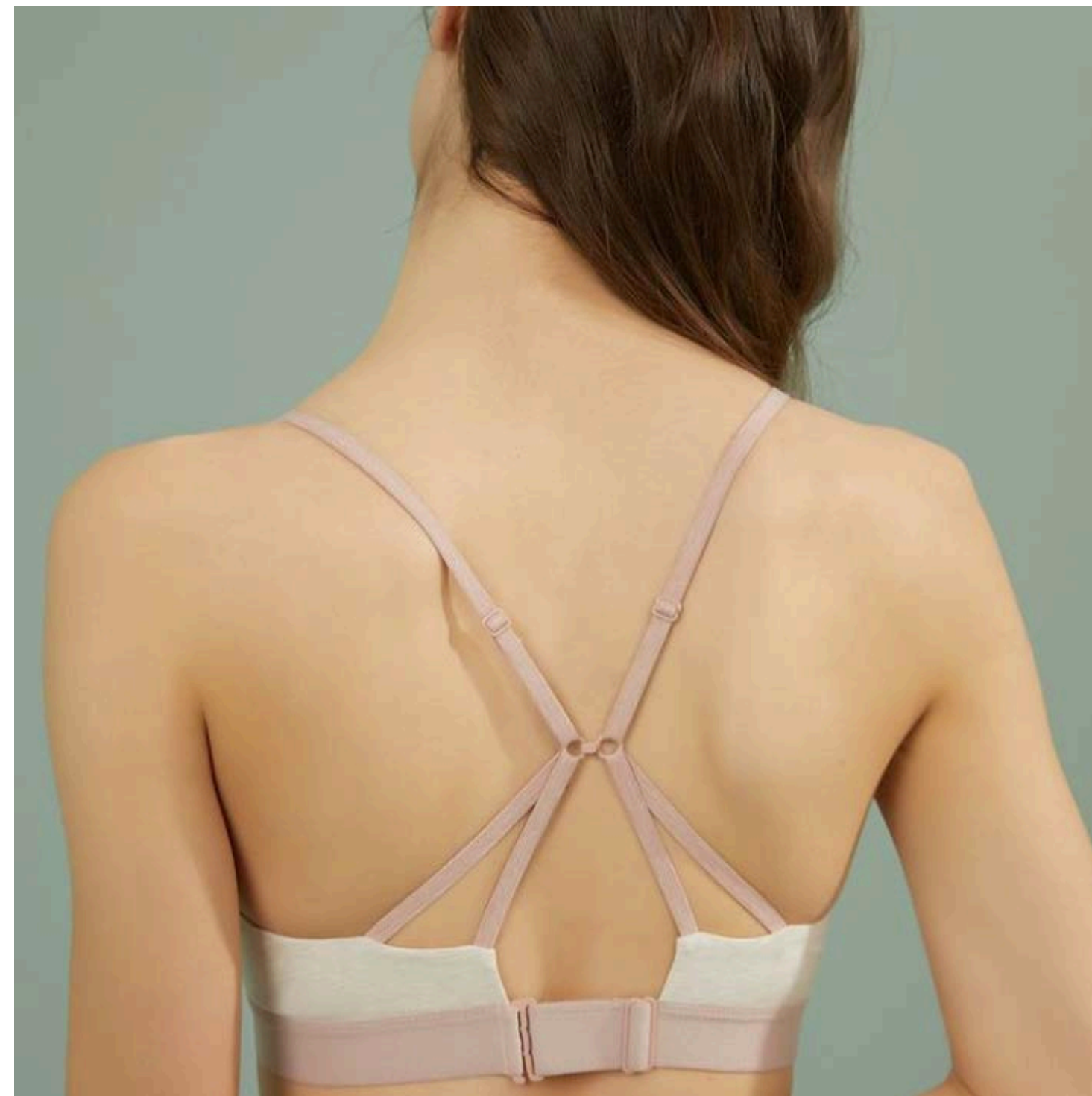
2018 - #3 in wireless bra category on Tmall. Signed Du Juan as spokesperson. Opened 26 physical stores. Expanded product lines to men, kids and activewear to become a lifestyle brand.

2019 - Expanded to over 70 offline stores. Building community through new channels and offline events.



BRAND

Emotional, interest-based content that drives reach/awareness.



CONSIDERATION

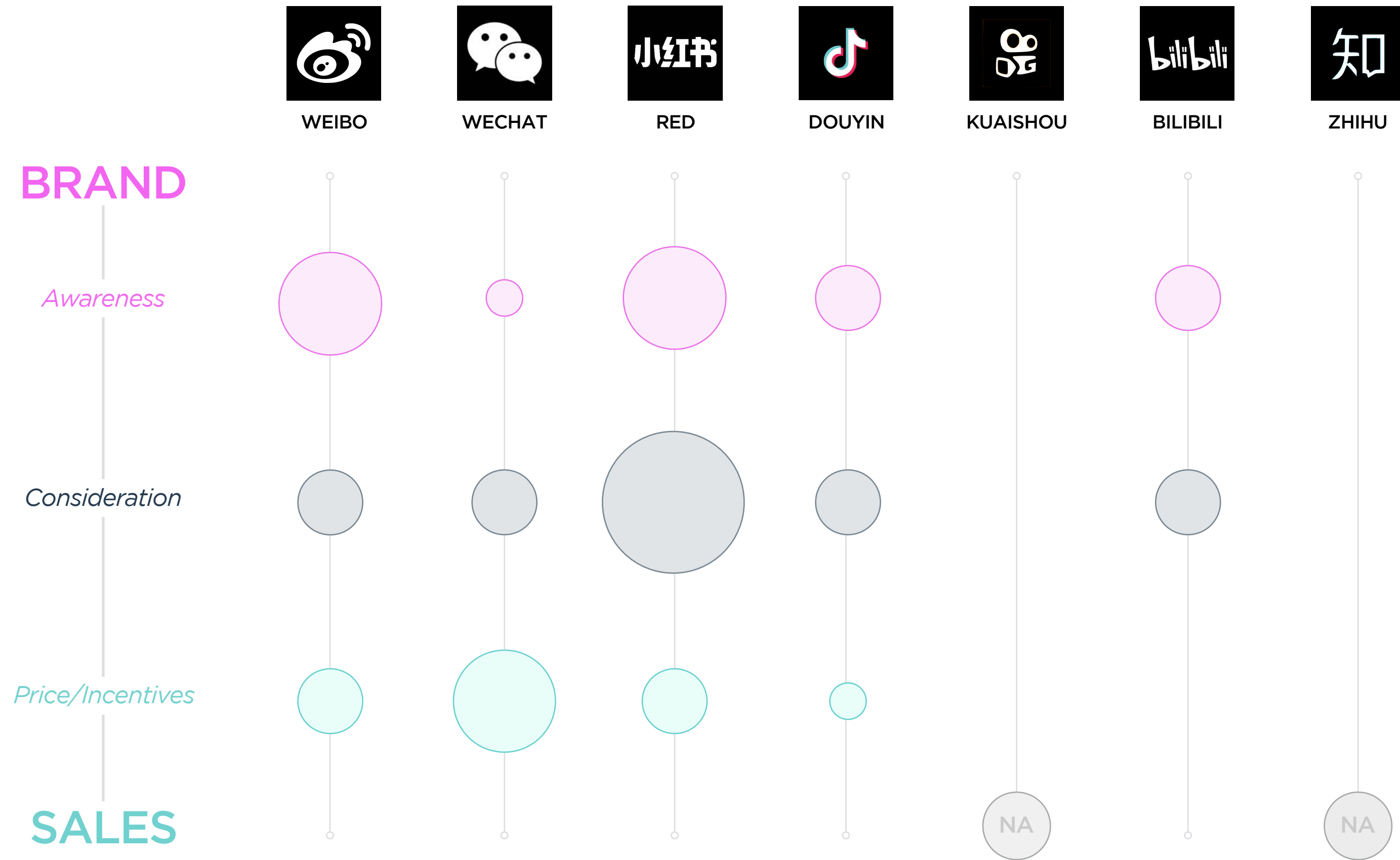
Product-focused content, images, styling that allow audience to "see themselves" with product.



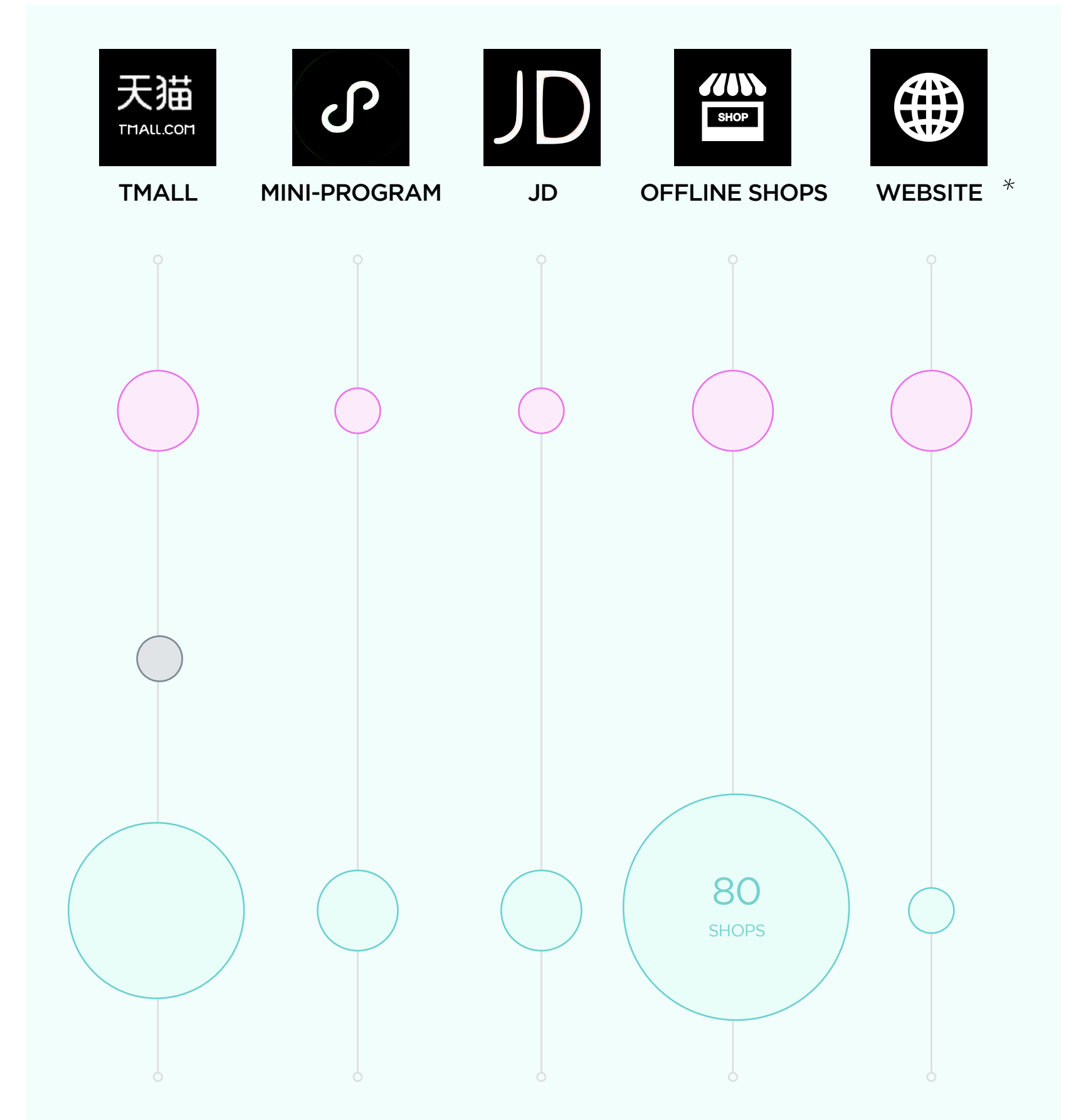
SALES

Posts that drive traffic to sales using discounts, incentives and promotions.

SOCIAL & CONTENT



ECOMMERCE



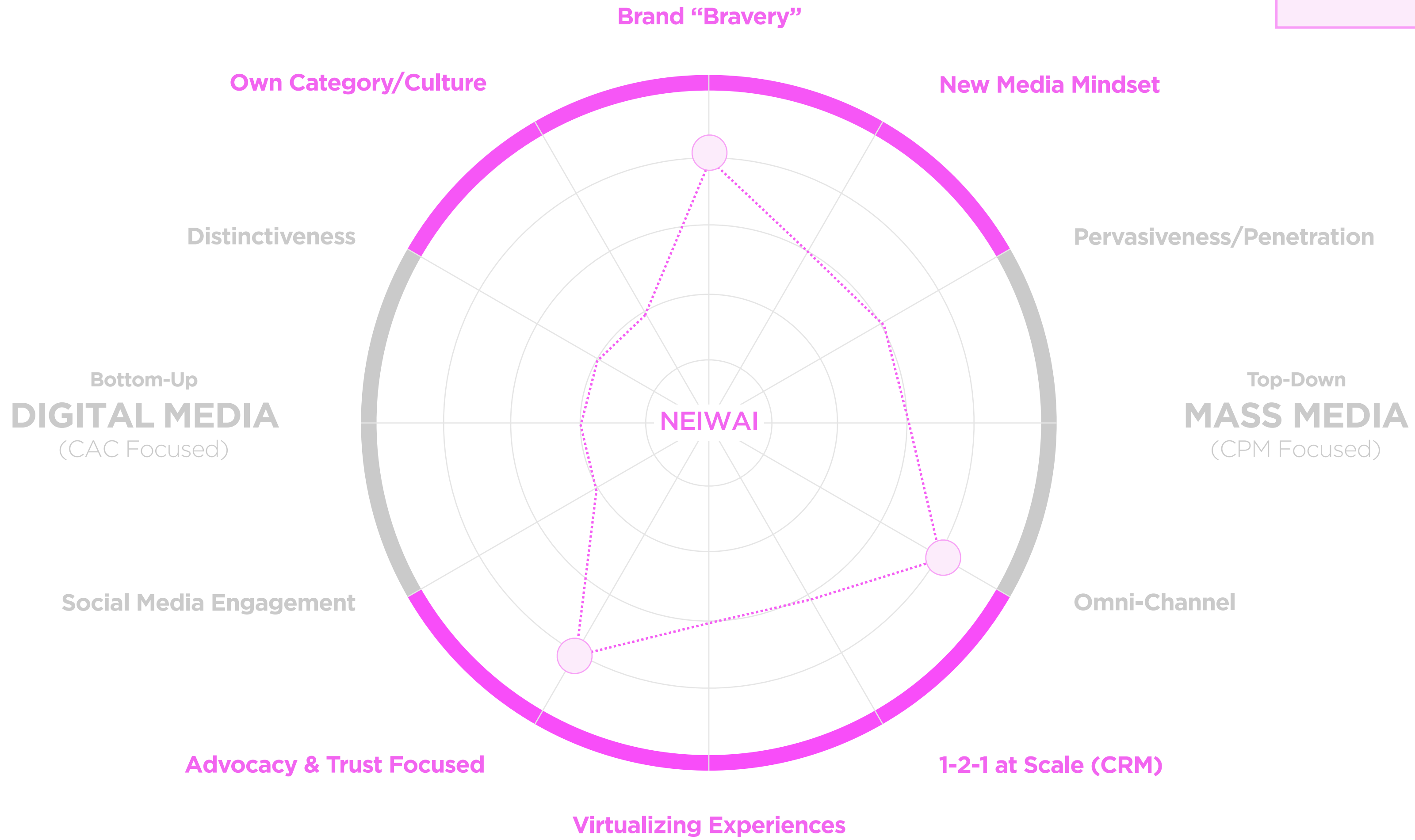
Bubble Size = Volume of Brand's focus per channel

* Global, English Website

GROWTH BRANDS

NEIWAI has a more traditional brand profile, focused more on; (1)top-down advertising, (2)a greater focus on physical/offline retail, and (3)more emotional, 'brave' branding.

DIRECT-TO-CONSUMER



TRADITIONAL BRANDS

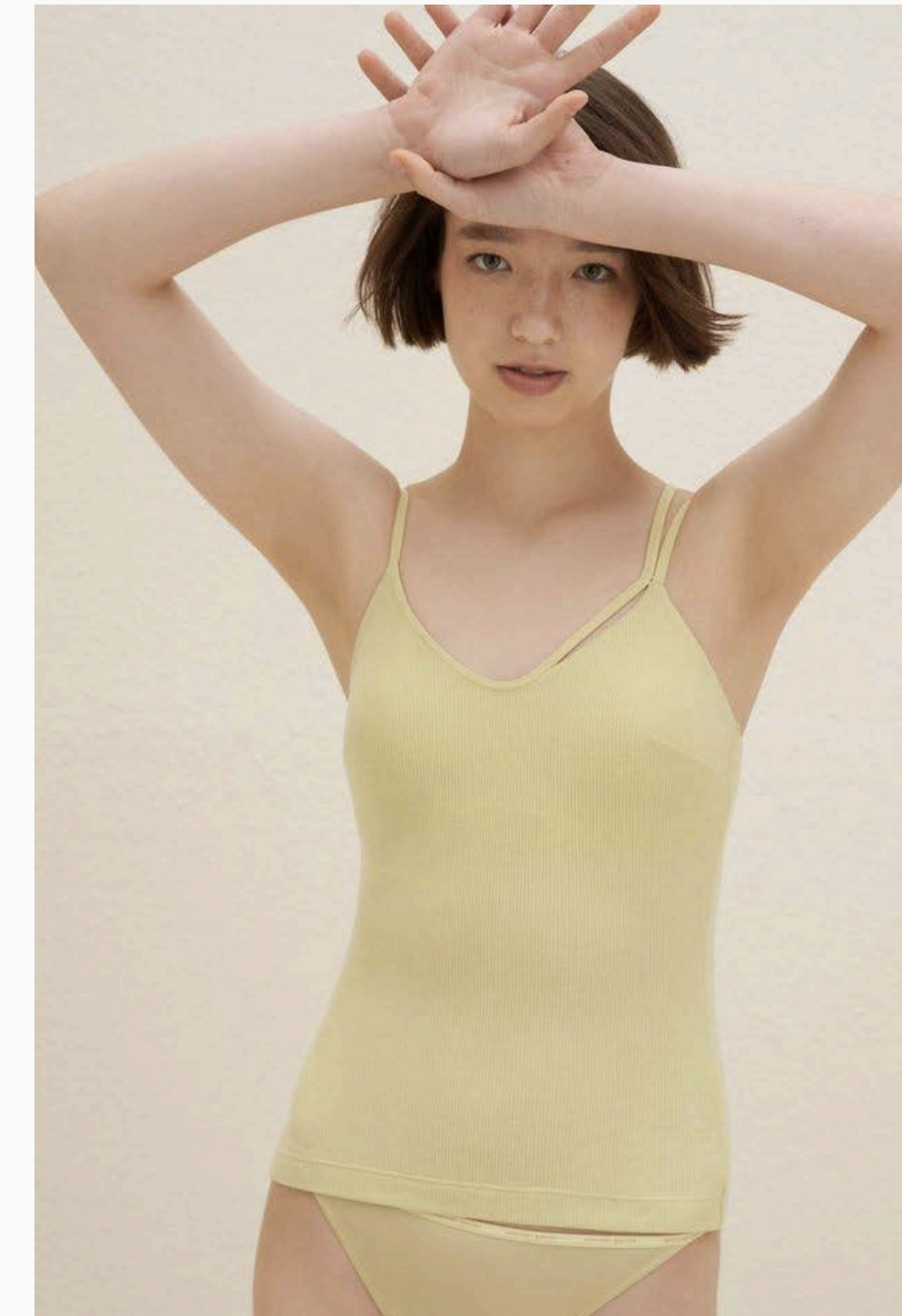
NEIWAI helped make lingerie more mature in China

AN INNOVATOR IN THE CATEGORY

While lingerie in the Chinese market was saturated with overtly ‘sexy’ designs, mainly created to please others, NEIWAI chose a different path. It defined a new direction for the category, with a line of comfortable lingerie, featuring minimalist designs. The goal was to provide simple, elegant, functional designs that were more about pleasing oneself.

The signature line of wireless bra, “Pure Comfort,” is geared towards women with an independent mind - with the goal of tapping into widespread changes in consumer mindsets in China.

NEIWAI has subsequently developed and launched other functional designs for other groups, including youth, maternity and other segments.



NEIWAI's “Pure Comfort” line features minimalist designs and neutral colors.

Celebrating difference is a real risk in China, where traditional definitions of beauty are firm

IT'S OK TO BE DIFFERENT

Unlike most other lingerie brand campaigns that feature sexiness and attractiveness, NEIWAI launched "NO BODY IS NOBODY" campaign during Women's Day 2020 to celebrate different body types of Chinese women.

The film featured six women of different age, status and body type, and promoted a message to love your body and yourself no matter what others say.

The campaign reached an audience of 100 million online. It was very well received with millennials and Gen Z on social media. NEIWAI successfully gained an army of supporters and planted seeds for long-term brand loyalty.

Watch the video at: <https://www.youtube.com/watch?v=dYdvCVfWTdQ>

I don't call it a belly, I call it extra charm.
“我喜欢我的肚脐。喜欢我的人也喜欢它。”

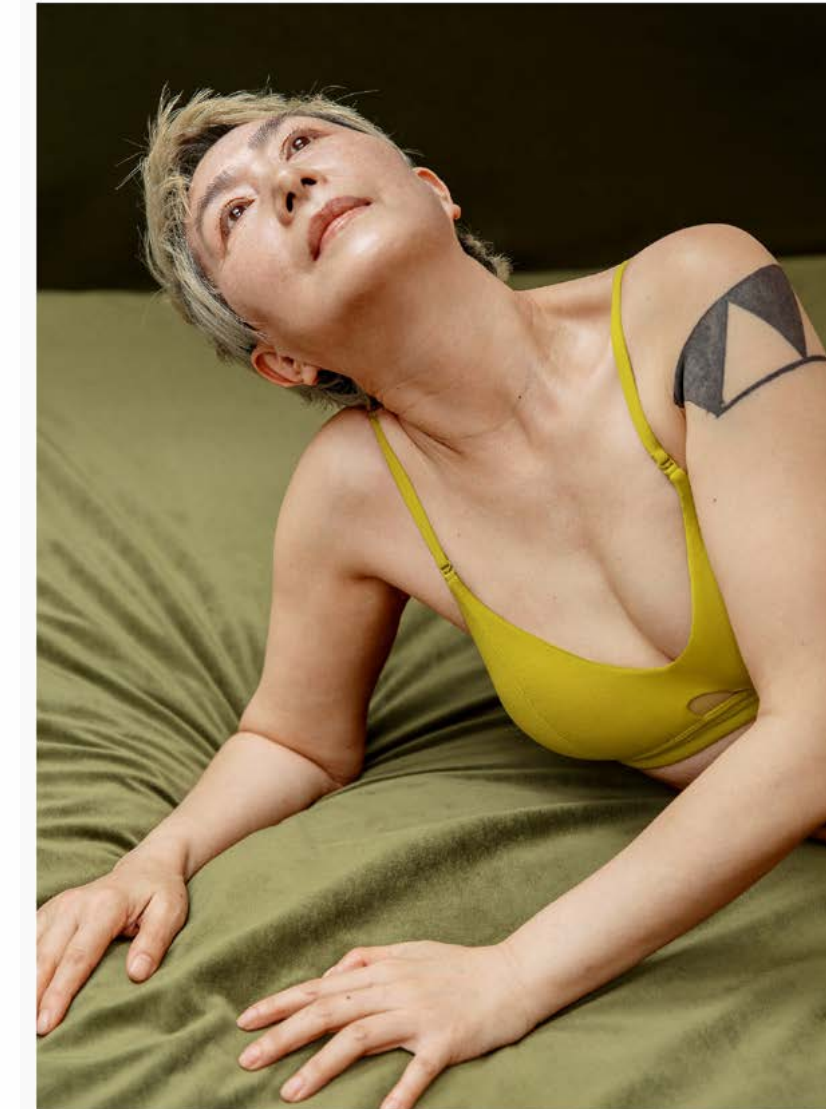


NO BODY IS NOBODY
没有一种身材,是微不足道的。



NEIWAI

I've loved this body for 58 years, and still do.
“我58岁。我依然爱我的身体。”



"No Body Is Nobody" campaign

Celebrating same-sex relationships in China is more rare, more daring

BE YOURSELF, BE REAL

The “INTIMATE RELATIONSHIP” campaign conveyed the message of loving life and oneself.

NEIWAI invited eight ordinary people to explore the real stories between their bodies and their loved ones, showing their attitude about intimate relationship and lifestyle. Among the eight consumers, some of them were singles, some heterosexual couples and some same-sex couples.

The campaign promoted the values of learning to love yourself first, then love others. It also explored the relationship between people and intimate wear.

Watch the video at: <https://www.bilibili.com/s/video/BV1Zy4y1b7pK>



“Intimate Relationship” video partnered with Nowness

Extending its audience from mature to younger groups on Bilibili and Douyin

GOING TO WHERE THE CUSTOMERS ARE

Bilibili is the main long-video platform for Gen Z to gather. It's popular for 'unboxing' videos and product reviews. The feature of Danmu (floating text on the screen) enables instant audience interactions and encourages engagement.

Since Gen Z is more open and vocal about female empowerment and body diversity, NEIWAI utilized the platform to share its brand films that challenge the traditional definition of beauty to generate buzz and gain awareness.

NEIWAI has also taken its videos to Douyin to foster peak moments of excitement and engagement - with short video clips.



NEIWAI's Bilibili and Douyin accounts

AMPLIFY THE IMPACT WITH CELEBRITIES

ADVOCACY/TRUST FOCUS

NEIWAI works with high trust, mature ambassadors at a brand level

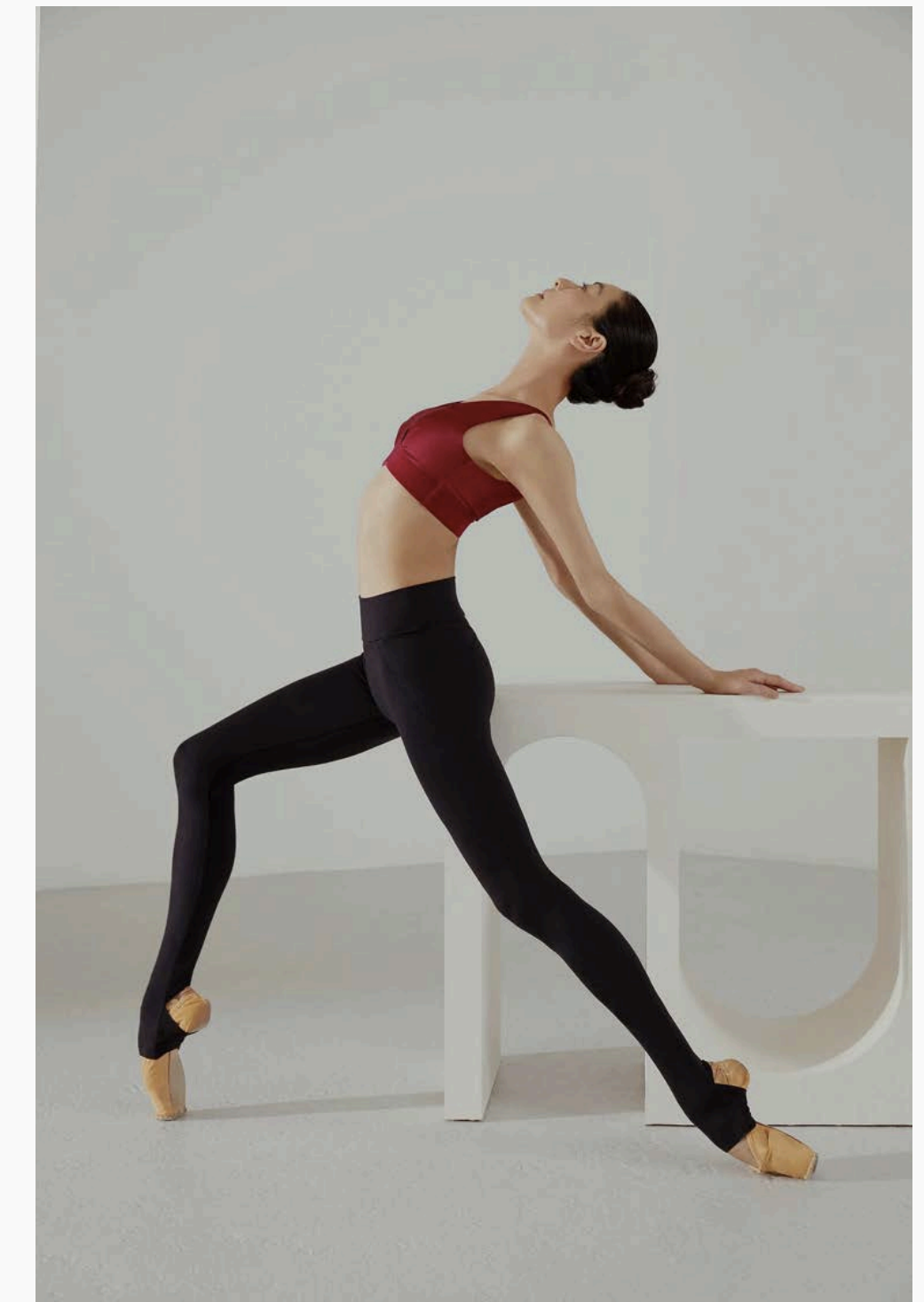
IMAGE, VALUES ARE ALIGNED WITH CELEBS.

NEIWAI leveraged the influence of celebrities to scale up its awareness. It invited female celebrities whose personal image and story perfectly align with NEIWAI's values to be the brand spokesperson and ambassadors.

Wong Faye - Independent, mature, brave to be herself

Tong Yao - Soft and strong

Tan Yuanyuan - Elegance, grace. She is the principal ballerina at San Francisco Ballet



NEIWAI's spokesperson and brand ambassadors

And support lower-funnel consideration and conversions

AUTHENTICITY AND INFLUENCE

When it comes to KOLs, NEIWAI has always been very selective on partnership and chosen only the ones that really resonate the brand value inside and out.

Micro-influencers have a more targeted audience that are dedicated to the influencer's identity. NEIWAI selects the ones that not only match the product but also share the same brand value to build trust through authentic advocacy.



NEIWAI's partnership with KOLs on Weibo and RED (Xiaohongshu)

Engagement through a range of touchpoints, online and offline

EVENTS AND ACTIVITIES OF SHARED VALUES

NEIWAI started building its first group of advocacy in 2012 by sponsoring the “She Said” charity forum, where successful businesses share their growth stories. Over the years, NEIWAI has been collaborating with events that align with their values of female empowerment and brave self-expression.

From endorsing fitness classes at local dance studios to co-hosting an immersive art show about intimate relationship, NEIWAI perfectly expressed the brand values while encouraging customers to express themselves. It built a community for its customers to gather and connect with the brand on a meaningful level to turn fans into advocates.



NEIWAI Active's Fitness Events and Immersive Art Show

Establish an emotional connection to enhance trust and brand loyalty

COMMUNITY TO SUPPORT VALUES

Engaging customers through brand values, NEIWAI has built an interactive platform/community for females to discuss and share their intimate stories. It initiates regular discussions on its social accounts to share topics about body diversity and encourage its audience to share their stories. At the same time, NEIWAI's Weibo and Bilibili accounts host special video series "Body Talk" and "In the Crowd" to allow girls of different body shapes to have their voices be heard in an environment where "skinny and pale" is the standard for beauty. NEIWAI encourages its audience to share their personal growth stories to inspire others in the same situation to be confident about who they are inside and out.

NEIWAI also collaborated with online counseling platform Simple Psychology to launch a free course on female growth and body anxiety to support women in the process of establishing self-awareness and identity.



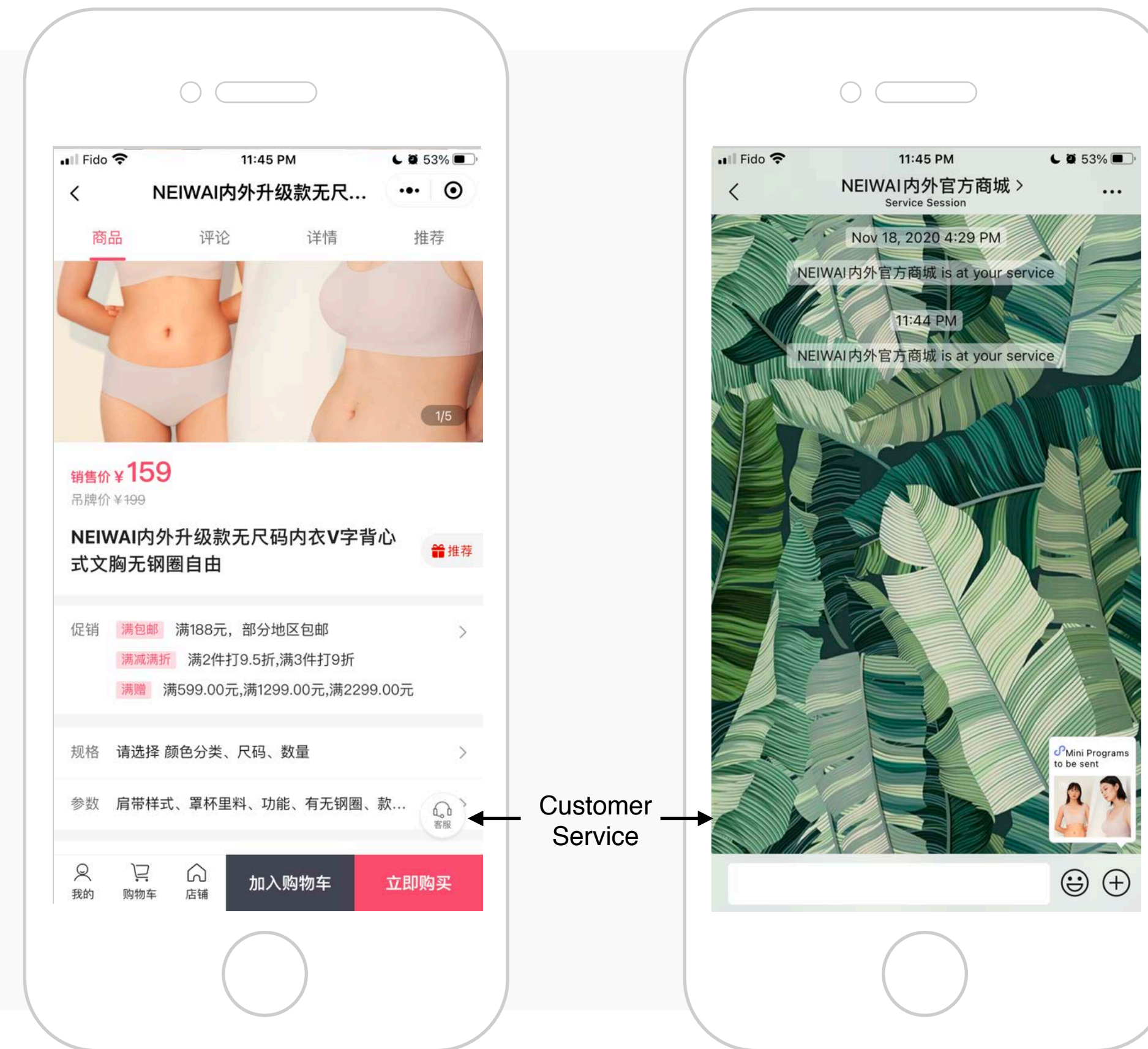
Collecting and sharing stories of plus-size girls

Use social CRM and technology to scale up the 1-2-1 connection and engagement

KNOW WHEN, WHO AND HOW TO ENGAGE

NEIWAI uses bots (and customer service teams) on social channels to provide instant and customized assistance for customers.

Customers can shop inside the WeChat ecosystem, manage their membership profile and connect with a customer service rep on the product page. With just one tap, a private chat room with the customer service rep will be created with a link to the product page. This chat will stay among the customer's regular messages even after they leave the Mini-program shop page. Customers can then come back at any time to continue the conversation and purchase.



NEIWAI's WeChat purchase page and customer service chat

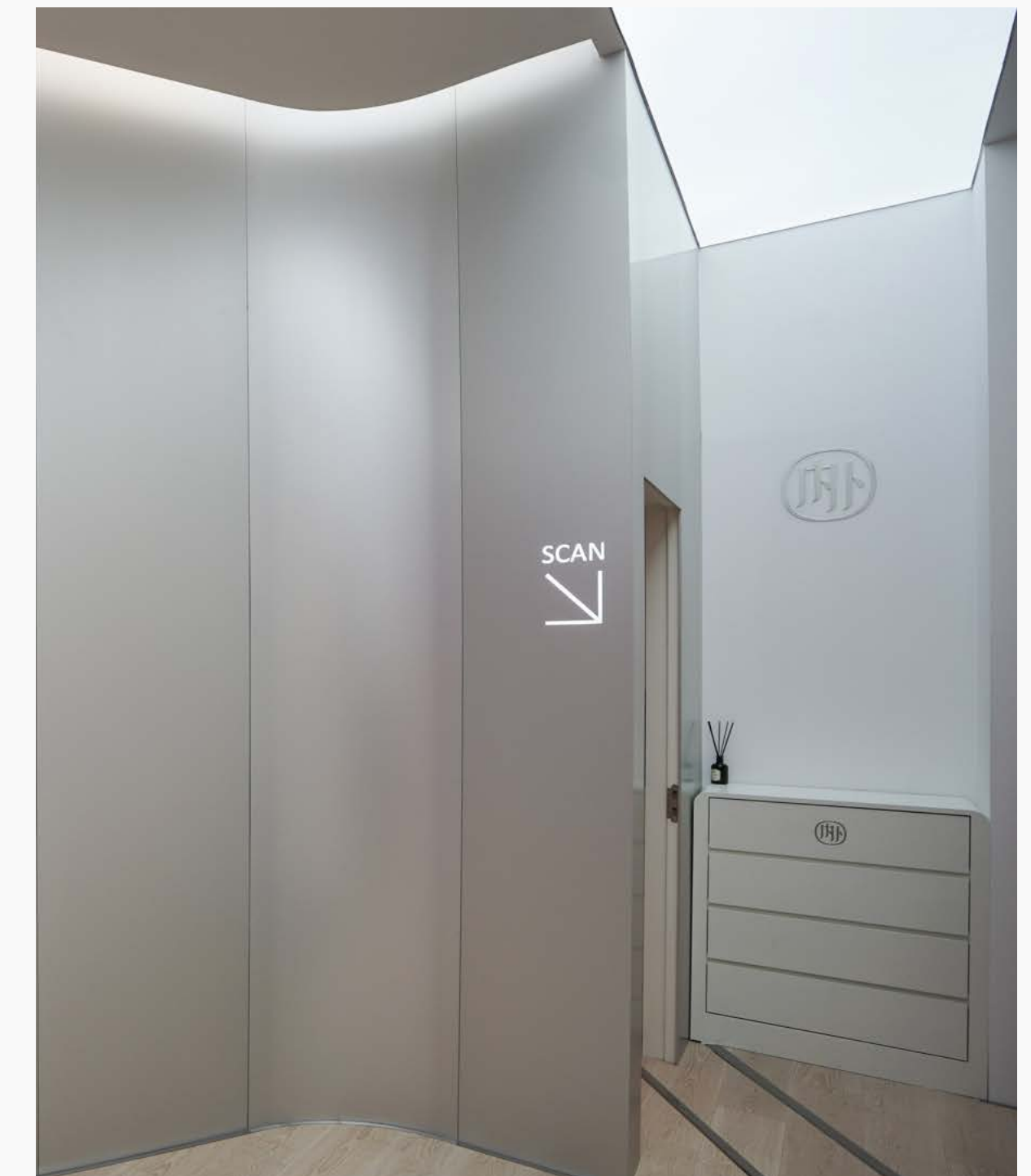
A seamless shopping experience supported by data, technology

OFFLINE EXPERIENCES, ONLINE CONVENIENCES

NEIWAI has pretty wide retail coverage - online and offline. They have online ecommerce with Tmall, together with WeChat Mini-programs and RED.

NEIWAI has about 80 physical stores in major cities that offer services to complement the online shops. Data (CRM) links online with offline. Customer profiles and preferences can be easily shared/accessed across channels through the membership system.

Offline shops feature 3D body scan rooms, to help customers find their best-suited sizes and styles. The 'scan rooms' also connect offline data to online CRM. The O2O linkage enables customers and NEIWAI to know each other better. The data can be used to improve prediction of product recommendations, improve personalized services and improve LBS marketing.



NEIWAI in-store 3D Scan Room



UBRAS

DTC BRAND PROFILE

INTRO.

UBRAS

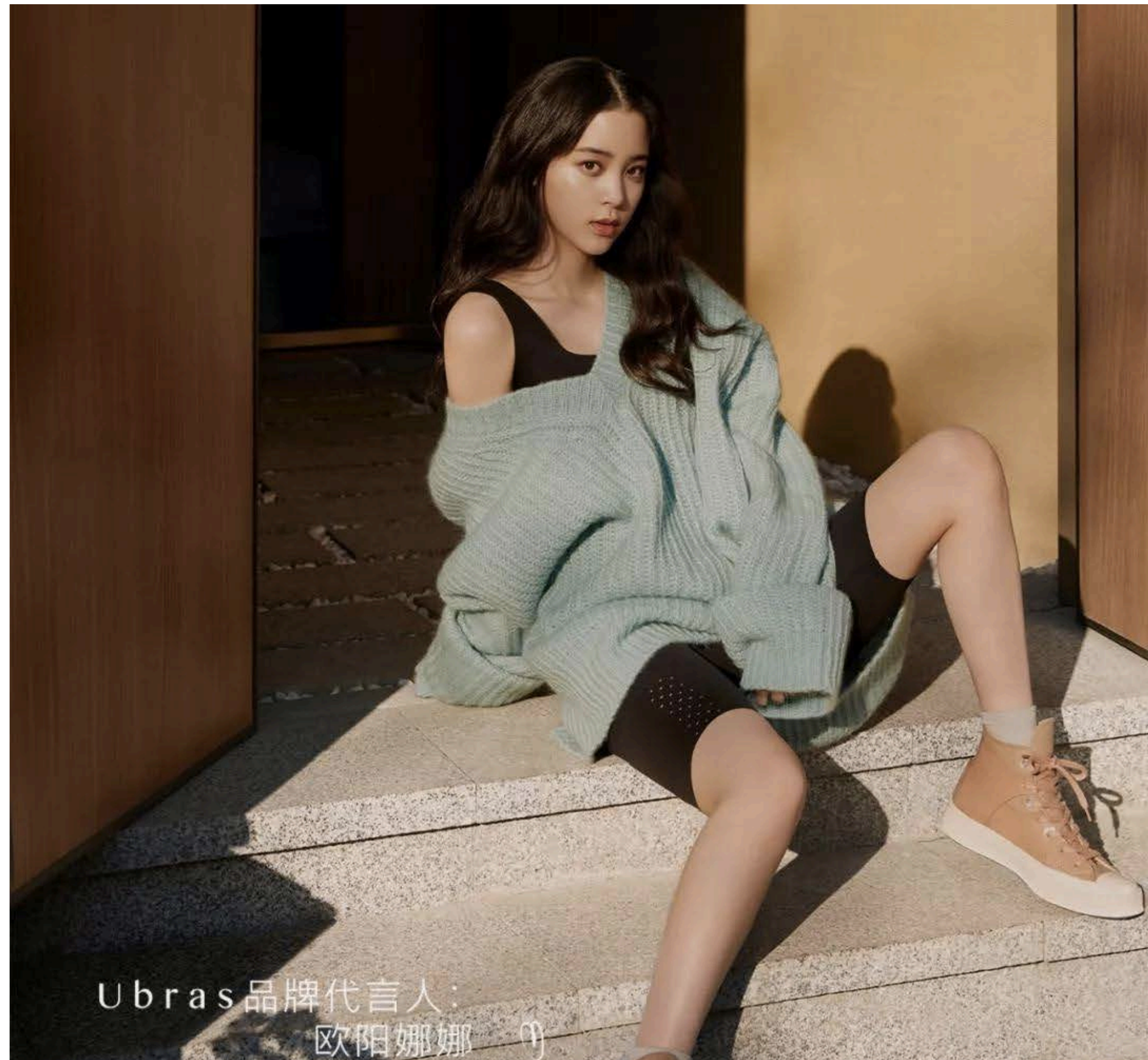
Launched in 2016, Ubras is organized around the brand concept of "highlighting the body's natural beauty." Its aim is to provide greater comfort and freedom, to a younger consumer.

This focus on simplicity and comfort is best represent by the company's signature "One-size" wireless bra - which can be worn as underwear and as sportswear.

Ubras has served more than one million female customers, providing intimate clothing solutions for different scenarios including home, work, sports, breastfeeding, etc.

So simple. So free.

Free because it is simple.



Ubras 品牌代言人：
欧阳娜娜

SEEDING

LAUNCH

GROWTH



2016 - Set up WeChat Official Account to build momentum with audiences.

Founded during the high point of the wireless bra movement, Ubras has focused on wireless bras, and the concepts of freedom and women empowerment.

The wireless bra market grew five-fold in 2017. Ubras strategy was to target millennials with more designs and colors.

2017 - Launched Weibo Official Account to increase awareness through KOLs and engage customers online.

Ubras introduced its "One-size" wireless bra. It immediately became a hot-selling product.

2019 - Opened its first physical store in Shanghai and signed Ouyang Nana as spokesperson to influence millennials and Gen Z.

2019 - RMB 25M sales during Double 11, three times the Double 11 sales of 2018.

2020 - Actively used livestreaming to scale up the traffic and awareness. Opened 10 stores in first-tier cities. One-size bra exceeded RMB 100M in sales during 618 shopping fest, and RMB 300M during Double 11, became the #1 lingerie brand on Tmall.



BRAND

Emotional, interest-based content that drives reach/awareness.



CONSIDERATION

Product-focused content, images, styling that allow audience to "see themselves" with product.

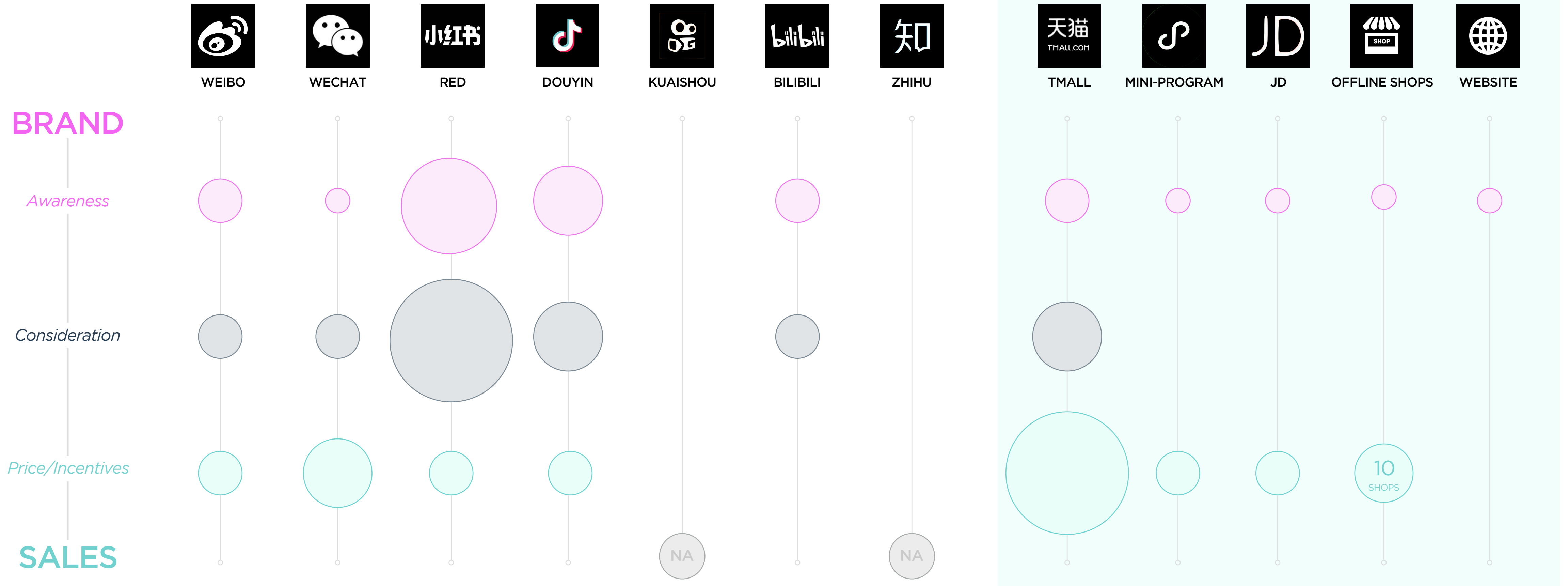


SALES

Posts that drive traffic to sales using discounts, incentives and promotions.

SOCIAL & CONTENT

ECOMMERCE



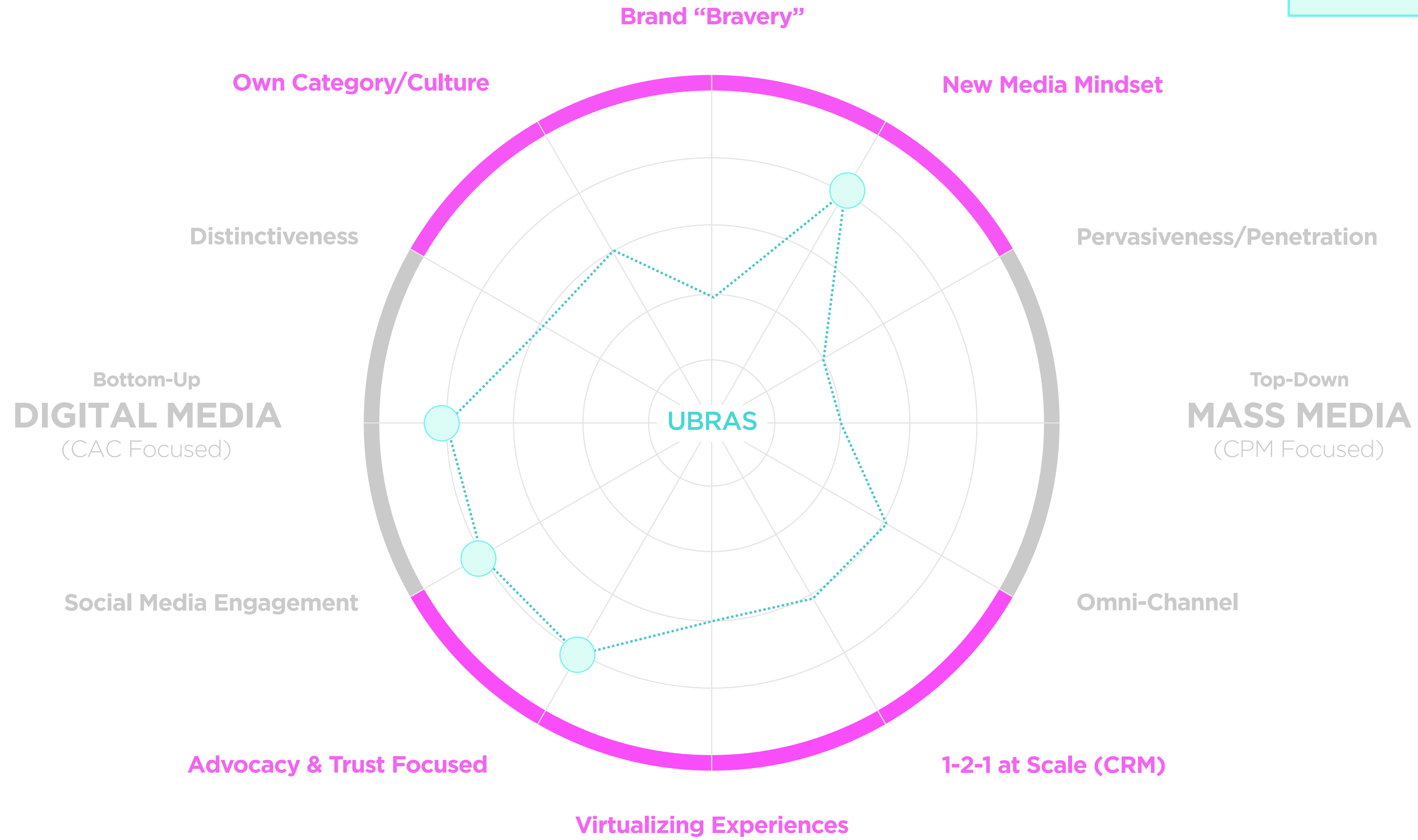
Bubble Size = Volume of Brand's focus per channel

GROWTH BRANDS

Ubras has a more digital-first brand profile, with a firm focus on; (1)digital acquisition, (2)social media engagement, and (3)new media/ tactics (most notably; livestreaming).

DIRECT-TO-CONSUMER

TRADITIONAL BRANDS



Taking simplicity further

LEANING INTO THE ATHLEISURE TREND

Ubras joined the wireless bra space in 2016, with NEIWAI clearly in its sights. Ubras product offering is similar to NEIWAI in many ways; clean, simple, elegant designs, with pricing parity.

Originally Ubras distinguished itself by focusing on a younger audience, with a wider range of color options. But it was only after introducing its “One-size” bras in 2018, did sales really take-off.

The “One-size” bra has become its signature product - removing fitting challenges for customers on purchase. The product also has yielded much greater supply chain efficiencies.

They tout the benefit of the bra design as being something that can be worn both under clothes and as a sportswear top. This positioning puts it in a good position to benefit from the athleisure movement, currently exploding higher in China.



The “One-size” bra is Ubras signature product.



Ubras markets its “One-size” bra as outside fashion friendly.

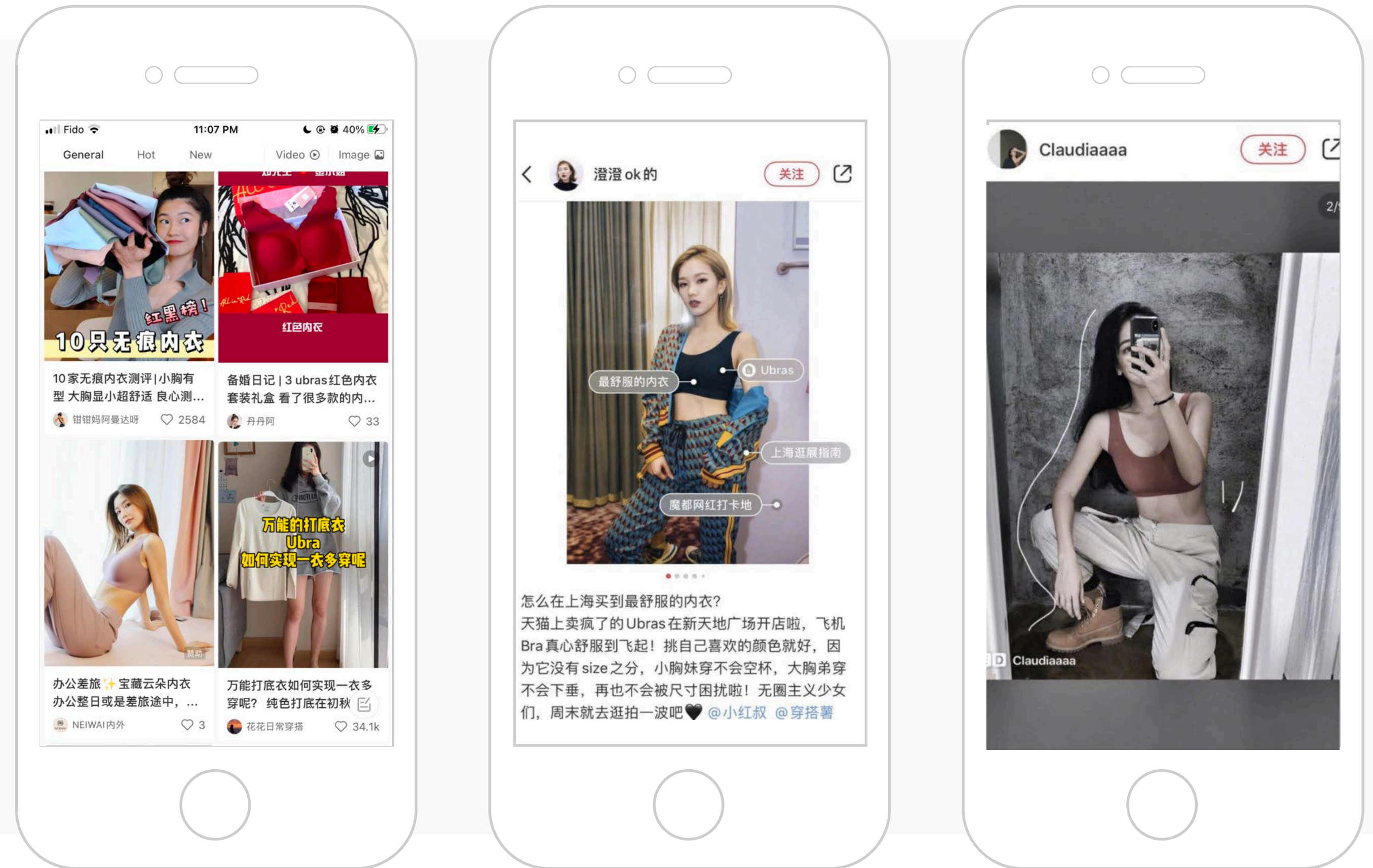
KOL, KOC and UGC support the link between awareness and sales

LEVERAGING RED AS A KEY ADVANTAGE

Ubras chose RED as the main channel for its social efforts as a way to more closely link discovery-consideration-purchase.

They use celebrities and 'big' KOLs to create initial awareness. Consideration is supported by a range of mid-to-micro-influencers and KOCs. These smaller influencers provide a volume of recommendations and reviews, which in turn helps guide would-be buyers through to purchase.

The team at Ubras actively orchestrates this mix of personalities and content across channels (at peak purchase times), re-marketing to followers on RED and other channels, such as Weibo, Tmall etc.



KOLs, KOCs and UGC content on RED

UBRAS HAS A LIVESTREAM FORMULA

NEW MEDIA MINDSET

The brand's preparedness in 2020 for livestream sales fueled growth

BE PREPARED, YOUR TIME WILL COME

2020 turned out to be very favorable year for Ubras - despite it being a challenging year for many others. Ubras was well prepared to sell online - with livestream commerce. And, at the same time there was a big increase in desire for comfortable clothes.

Ubras was also fortunate that its core product, the 'One-size' bra was suitable for demo on video - it's a product designed as both under-and-outer wear.

Ubras developed its formula for livestream selling back in 2019, when Ubras first worked with Viya (one of the most popular livestreamers), and became the number one lingerie brand in Viya's livestreaming room. During the pandemic, Ubras continued with Viya and expanded to Liu Tao's livestreaming room.

The brand also hosts its own livestreaming shows focusing more on brand, product information and customer questions.



Top Livestreamer VIYA



Ubras' brand livestream room



Celebrity's LIU TAO livestream room

Supporting brand growth across multiple city tiers

SEEDING INTEREST WHILE RAISING AWARENESS

In 2019, Ubras signed Ouyang Nana as its brand ambassador. The 20 year old influencer is a strong match for the brand, in both age and image - she is down-to-earth, and has strong appeal beyond China's first tier cities. She is relatable into lower tier markets, which has lead to very strong results for the brand in those markets.

Ouyang Nana is present across all the brand channels and key visuals - leading (giving confidence) to customers at each stage of the purchase journey; awareness - consideration - purchase - review/sharing - awareness.

Ouyang Nana is a popular actress and singer loved for her daily down-to-earth vlogs. The 20-year-old icon is admired by 8 million fans on RED and 23 million on Douyin for her unique fashion sense and music talent.



Ouyang Nana spokesperson and KOL

During the post-purchase 'honeymoon' Ubras asks for customer support

HIGH TOUCH CUSTOMER ENGAGEMENT

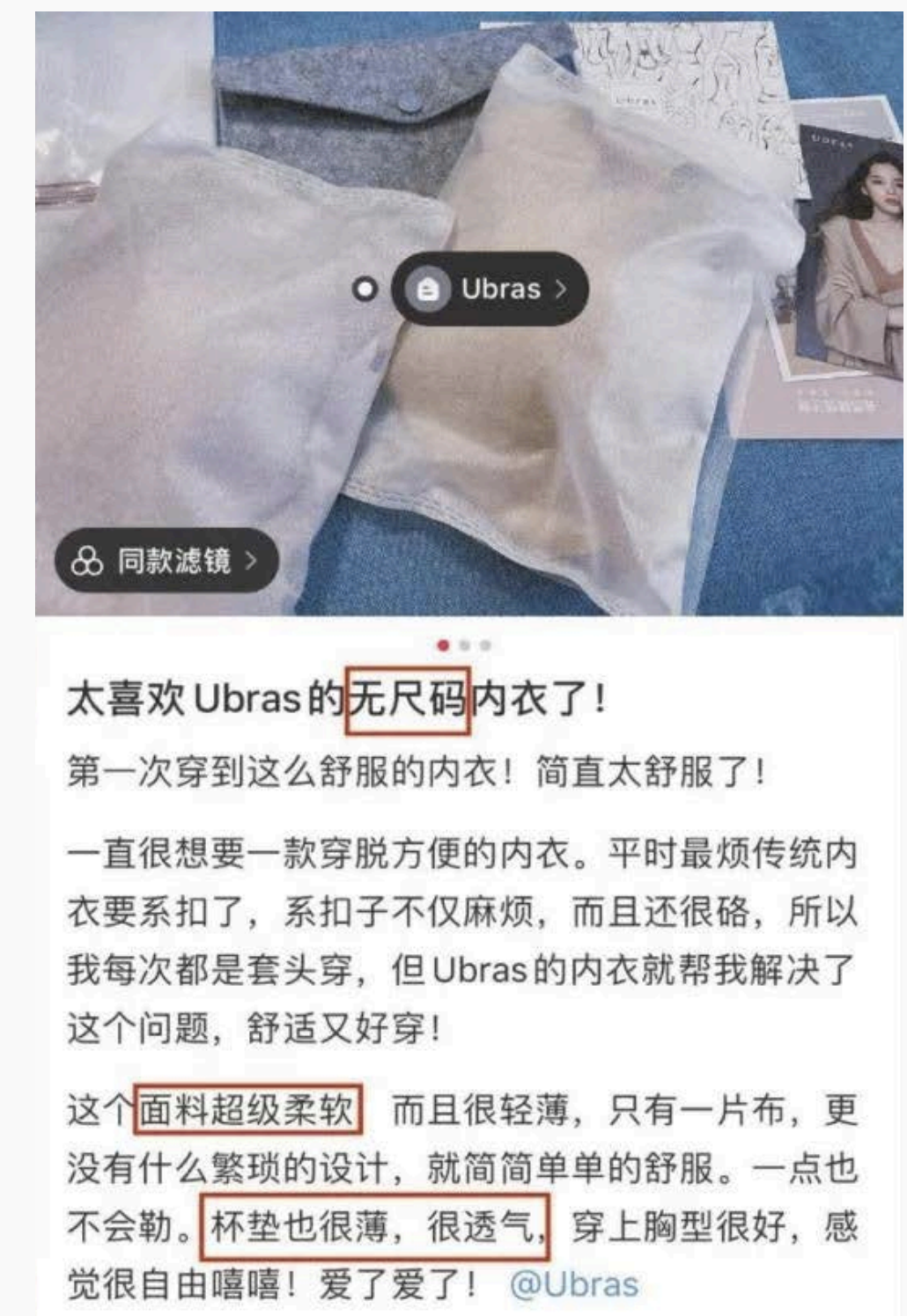
In a further effort to build engagement with its audiences, Ubras has setup a 'personal' WeChat account, under the name of "U Meow" - allowing Ubras to show up in the customer's "friends list" instead of being relegated to the brand subscriptions list. The goal is to use this account as a first point of contact and provide more personal, high-engagement service.

The customer journey starts with a purchase, where upon receiving the package, the customer gets an invitation to connect with the "U Meow" Ubras' account. From there, the brand operators behind "U Meow" will direct the customer to a range of follow up channels/opportunities, such as; customer service, deals & new products livestreams and other social accounts.

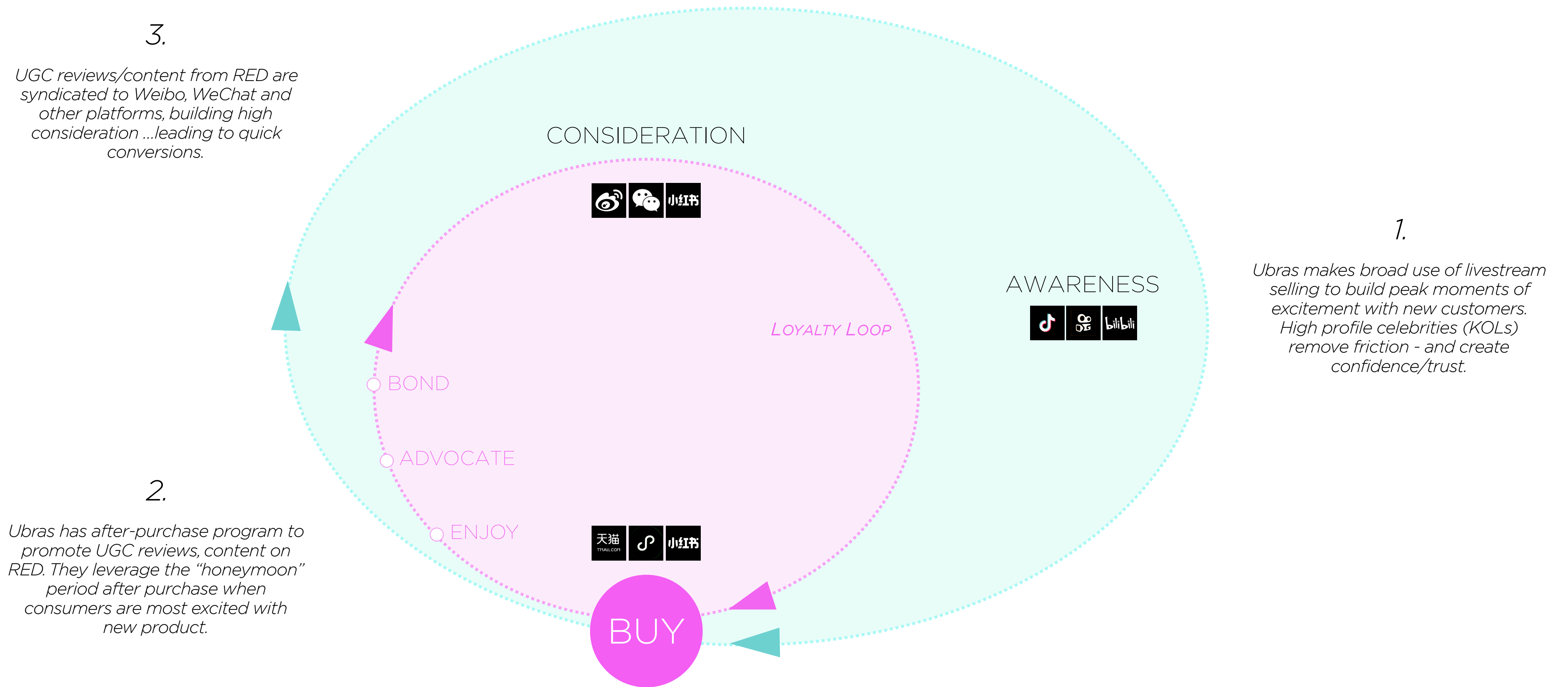
U Meow also invites customers to share product reviews on RED - asking them to use specific keywords. Once the post is verified by Ubras, the customers will receive free underwear.



Invitation to post on RED with specific keywords



Customer's post on RED with keywords requested by Ubras



Ubras created mystery box to connect with Gen Z customers

STAYING FUN, FRESH ...GENERATING BUZZ

'Mystery boxes' with cute toys took China's GenZ by storm during the past year. The anticipation of the unknown and the excitement of opening - and collecting generated a lot of buzz amongst a wide part of China's pop-culture.

Ubras built off of this phenomenon by launched its own mystery boxes called "UU Boxes" - to create a similar experience with its fans.

When customers buy a "UU Box," they receive the same style wireless bra as Ouyang Nana but in a mystery color. And, if the customer receives the lucky UP+ box, they receive another bra for free.

This strategy not only generated buzz on social media, but also emphasized the brand voice and commitment to its GenZ customer base.

解锁你的 lucky bra
天生有趣 UU 盒



Ubras x 欧阳娜娜
无尺码幸运盲盒 (UU盒)
舒适的方式有100种
只待你探索最有趣的那一个!

▪ UP+福利解锁方式 ▪

关注Ubras公众号

回复关键词“up+”，
上传UU盒吊牌“专属码”
即可兑换“再来一件”UU盒!

▪ 解锁更多流行色 ▪
每款颜色都设有隐藏款UP+

 ○ 白色	 ● 兰花烟	 ● 粉末蓝	 ● 影灰色
 ● 肤色	 ● 蜜桃茶	 ● 迷迭蓝	 ● 黑色

Ubras "UU BOX" mystery boxes - with mystery colors and prizes

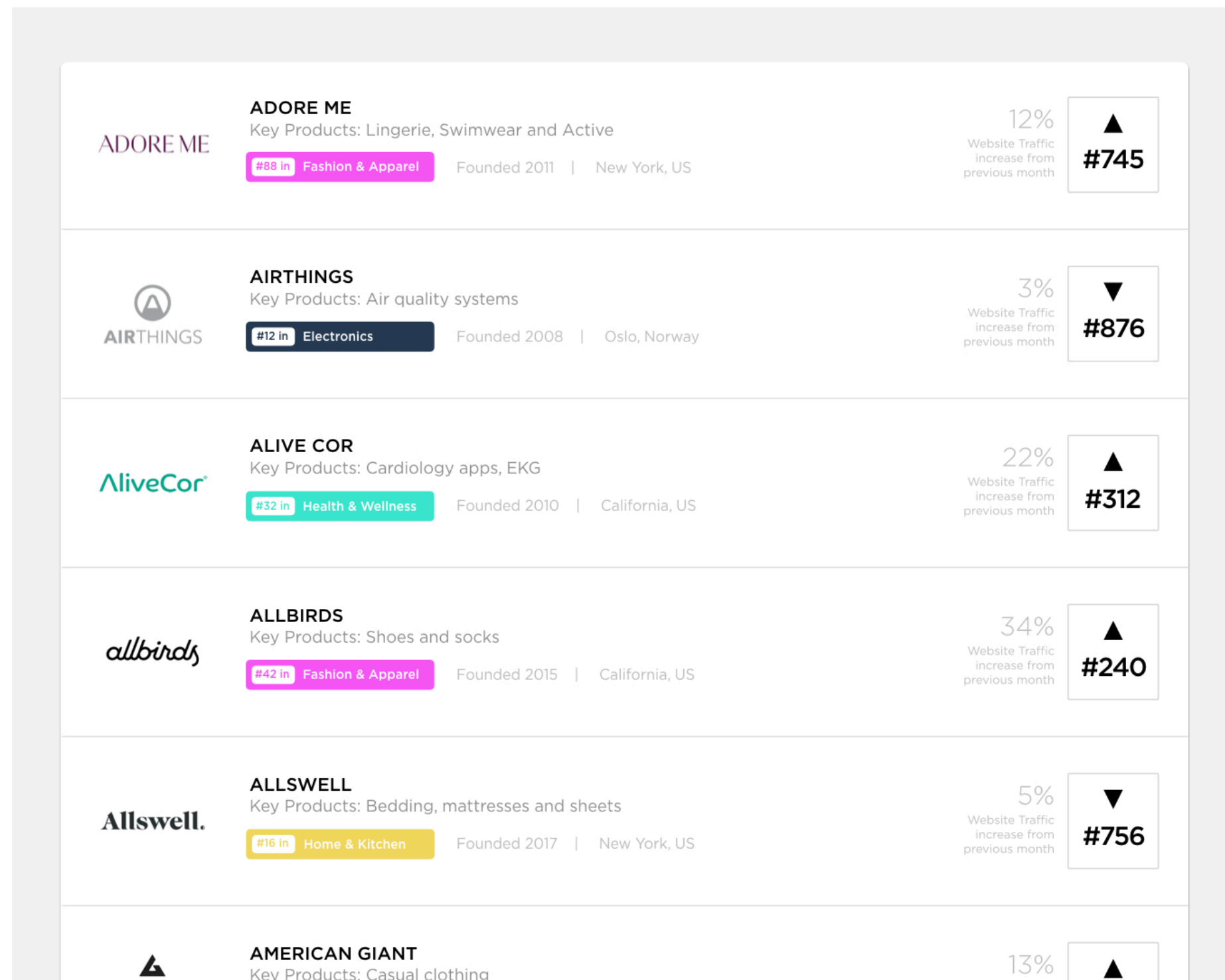
SUMMARY OF INSIGHTS

1. Livestreaming, RED and other new media were highly effective and provided a major boost to Ubras in 2020. Ubras has demonstrated an incredible degree of agility in managing its community on social media. Its team are intensely focused on pushing sales conversions through social; leveraging reviews, recommendations and a strong mix of brand and UGC content.
2. The “Athleisure” movement in China is massive and being aligned with it, is a powerful driver of consideration and sales growth
3. Being able to project the brand into lower tier cities is a major advantage - especially at a time where Tier One Cities are becoming saturated, mature and overly competitive
4. NEIWAI is well positioned to succeed in longer-term, with a strong mix of online-offline retail AND with strong, bold branding and creative. If it can more fully adopt the new media tactics of Ubras, it should see a bounce in digital performance/sales

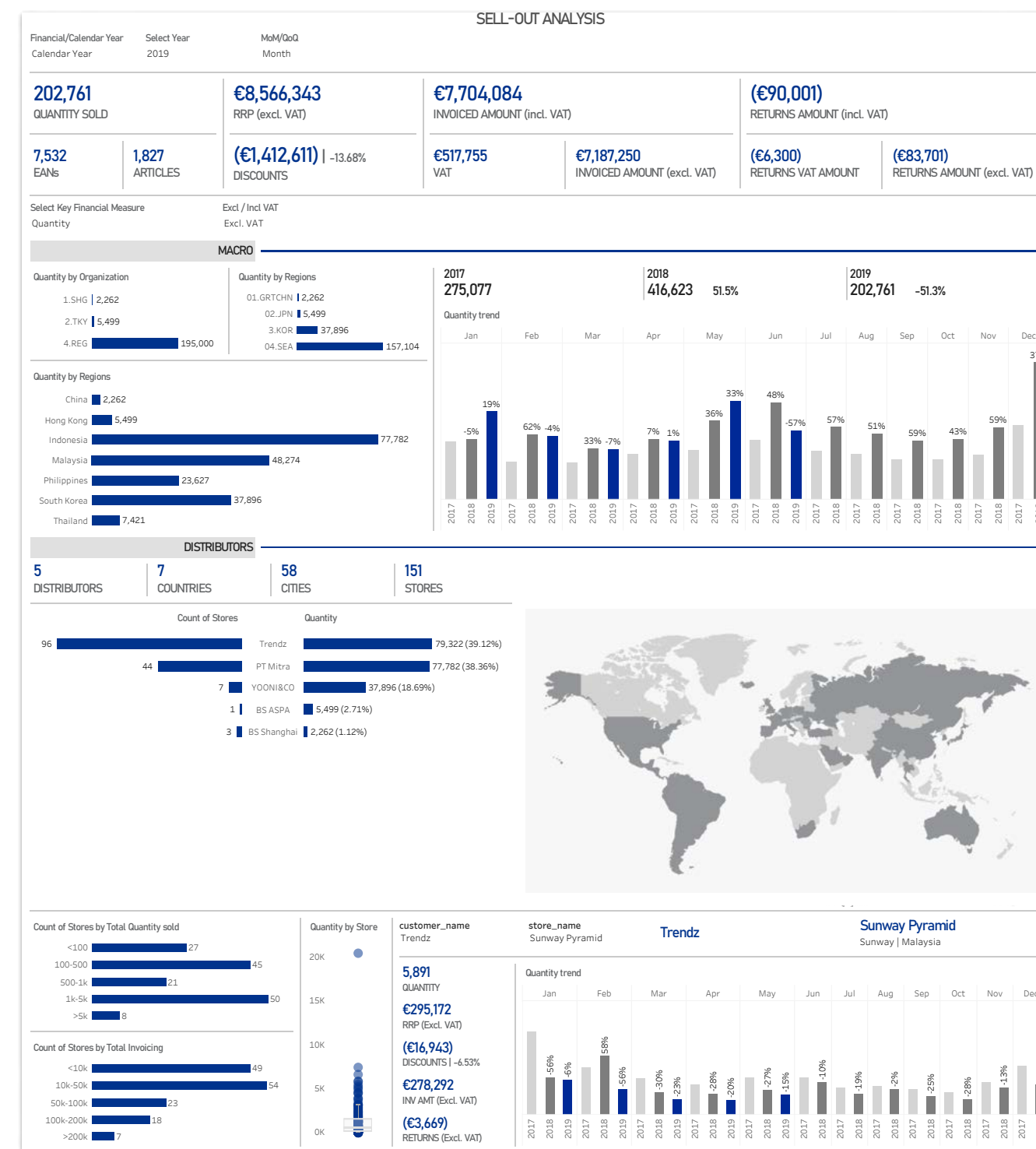
BRAND GROWTH FRAMEWORK



HOW TOTEM MAPS BRAND GROWTH/TRANSFORMATION



Totem's Global Database of 1,000+ DTC brands



Data/insights on Transformation of Mass Brands

BRAND GROWTH FRAMEWORK

What characteristics/strategies do winning brands utilize? What is the best pathway for transformation/acceleration?

Totem has applied a detailed analytical approach to answering these questions.

We have looked at these questions from the vantage point of two cohorts: (1) DTC (DNVB) brands and (2) mass/traditional brands who lead in key categories.

Totem's Brand Growth Framework represents the analysis of data from both cohorts, acknowledging that each cohort has advantages/weaknesses in key areas.

www.talktototem.com/dtc-insights

TOTEM BRAND GROWTH FRAMEWORK

Transcendent brands implement and refine a "winning formula."

A "winning formula" is the composition of strategies and tactics that bind the brand with its audience.

While winning formulas can be unique, leading brands share common characteristics of success.

There are also optimal pathways for implementation of new capabilities.

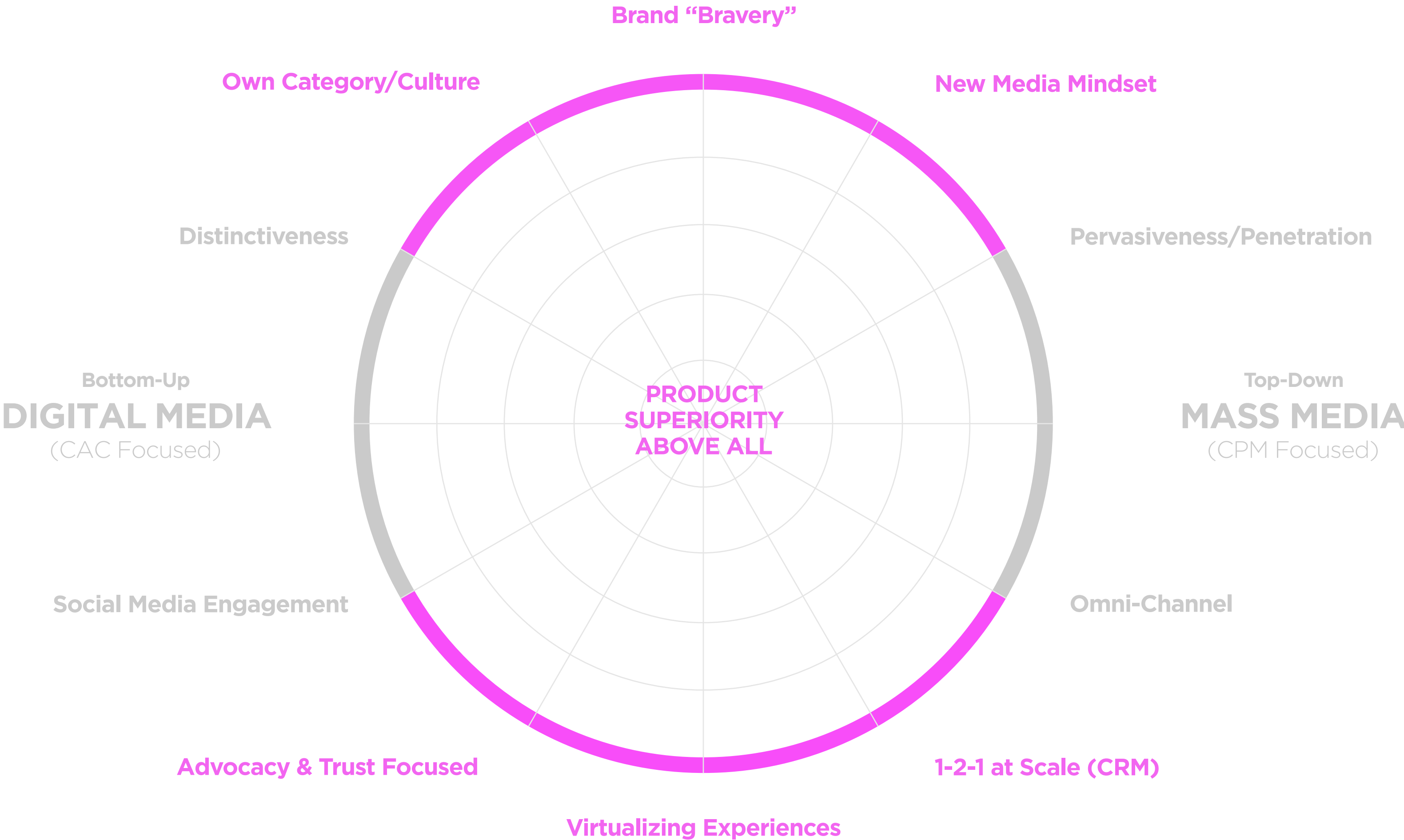
These characteristics and transformation pathways are summarized in Totem's Brand Growth Framework.



GROWTH BRANDS

DIRECT-TO-CONSUMER

TRADITIONAL BRANDS



GROWTH BRANDS

Own Category/Culture

Brand has moved beyond category distinctiveness to creating/defining a (new) category. Does the brand "own" a space/domain and act as the only choice to get a job done? Is it viewed as hallmark of a culture (tribe)?

Brand "Bravery"

Brands that are brave venture big gains with bold, compelling creative (campaigns, brand collaborations, stunts, endorsements). Risks of "high-reward" actions are mitigated when brands have loyal audiences.

New Media Mindset

Brand has a share of media investment dedicated to new, experimental, early-stage social/apps (TikTok, Snapchat), Gaming Co-ops, and other yet-to-be-proven media (e.g., AR/VR).

Distinctiveness

Brand is notable from others in category - "remarkable" in view of audiences. Distinctiveness in category includes product features/design, brand identity, audience niche or a combination of those attributes.

Bottom-Up

DIGITAL MEDIA

(CAC Focused)

Social Media Engagement

Brand creates content that is engagement focused (drives "consideration"). Social media team is highly responsive and conversational: they are speed-, authenticity- and reciprocity-driven.

Advocacy & Trust Focused

Deep connections with customers (product, service quality, attention to detail) are usually indicated by high engagement through all touchpoints. Brand has high percentage of staff dedicated to customer service and generous returns/refunds (and customer delight) routines.

Virtualizing Experiences

Brand has created digital online experiences, which mirror (if not improve upon) the offline experiences of the brand (e.g., AR/VR, live video customer service/sales/education, haptic experiences).

Pervasiveness/Penetration

Brand that has a very large scale in terms of media reach and penetration (usually as a result of large media budgets and use of traditional mass media), allowing it to have presence with audiences at scale.

Top-Down

MASS MEDIA

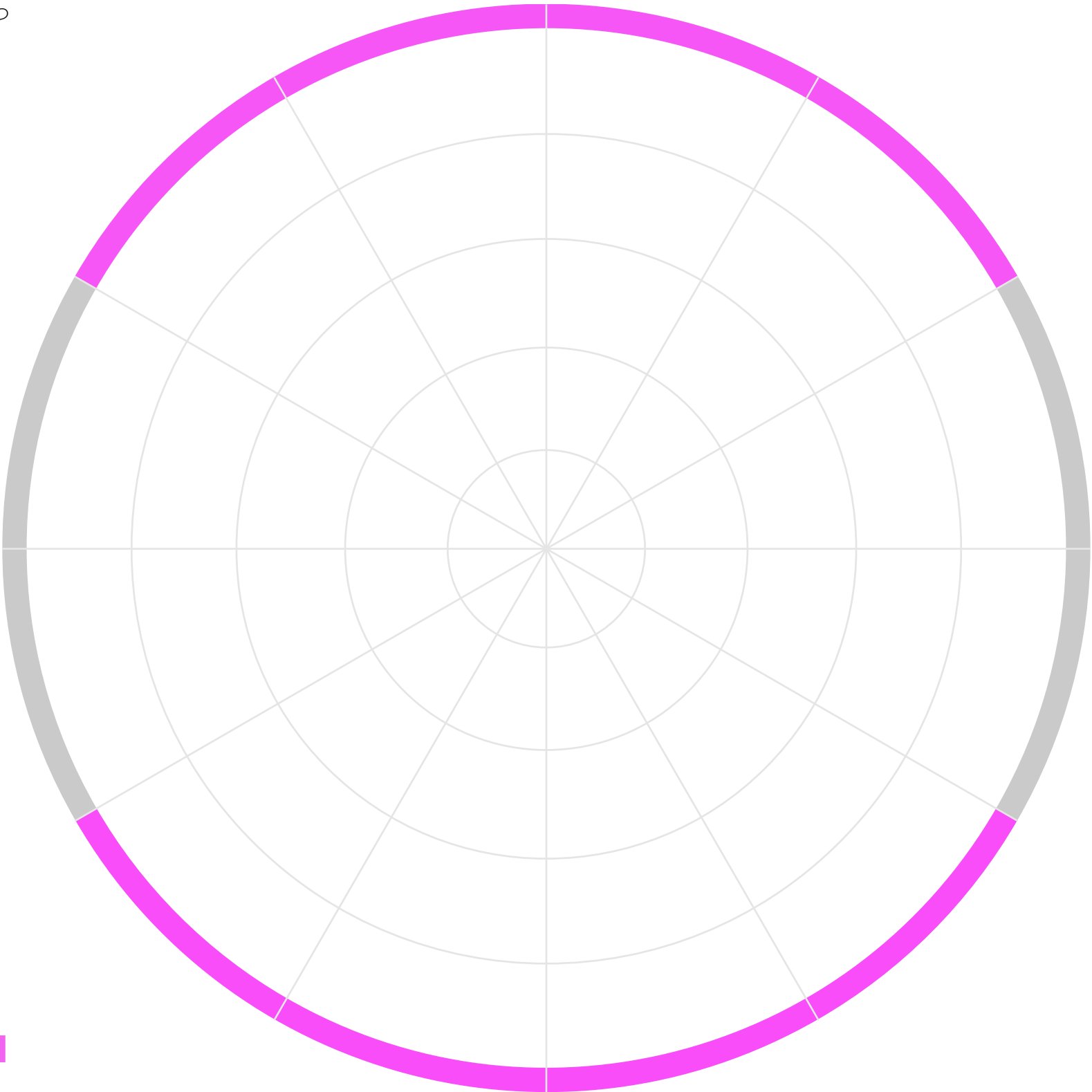
(CPM Focused)

Omni-Channel

Company has full array of sales and communications channels (online and offline). It is widely accessible for purchase anytime, anywhere. It has systems in place to support purchases between channels.

1-2-1 at Scale (CRM)

Systems are in place (offline and online) to communicate with individual audiences (and segments) at scale (e.g., bots, customer AI, messaging systems and customer service, subscriptions). It uses customer insights to tailor communications and personalize responses.



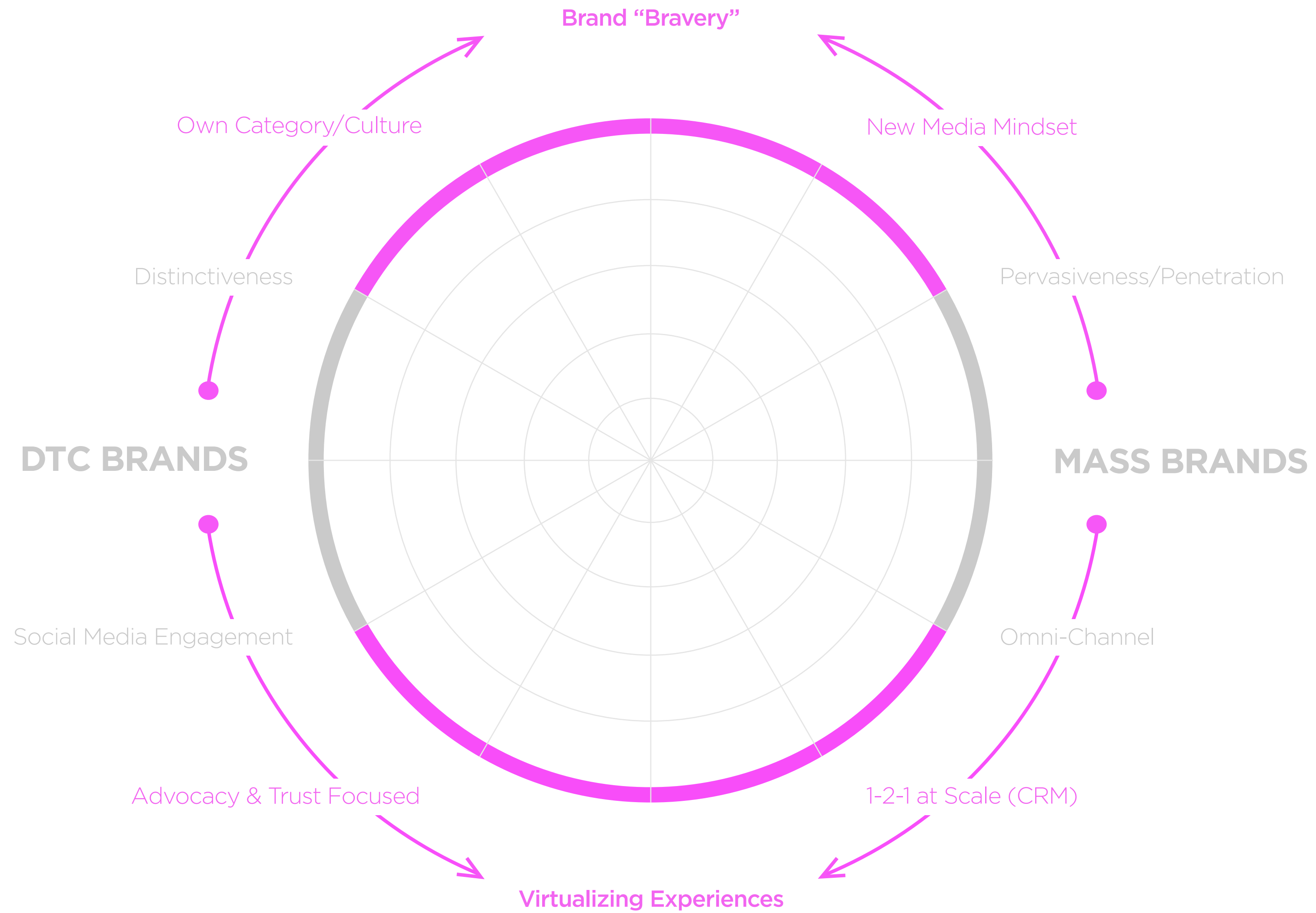
DIRECT-TO-CONSUMER

TRADITIONAL BRANDS

As technologies and consumer habits change over time, brands must adapt their formulas to keep up with the underlying changes taking place.

Each brand must have a clear view of the core components of its formula and adapt/amend as conditions change.





DIRECT-TO-CONSUMER

TRADITIONAL BRANDS

Distinctiveness



Own Category/Culture



Brand "Bravery"



New Media Mindset



Pervasiveness/Penetration



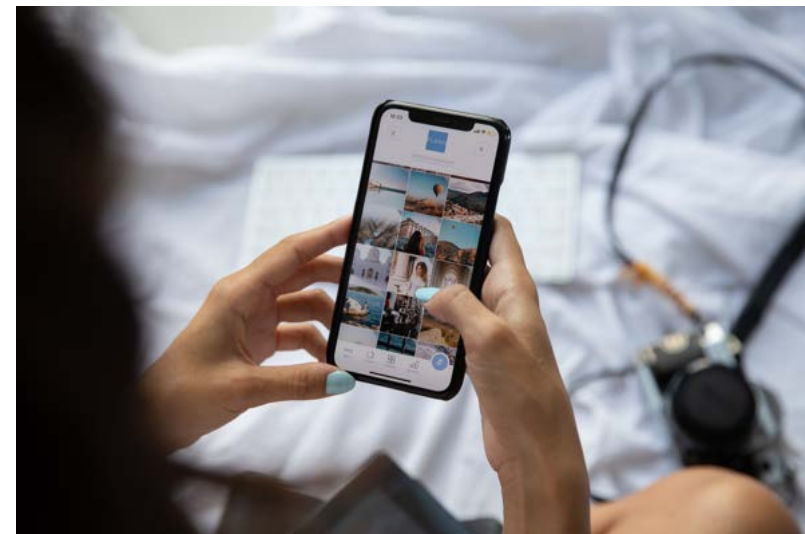
Bottom-Up
DIGITAL MEDIA
(CAC Focused)

● Easier ————— Harder —>

GROWTH BRANDS

<— Easier ————— Harder —●

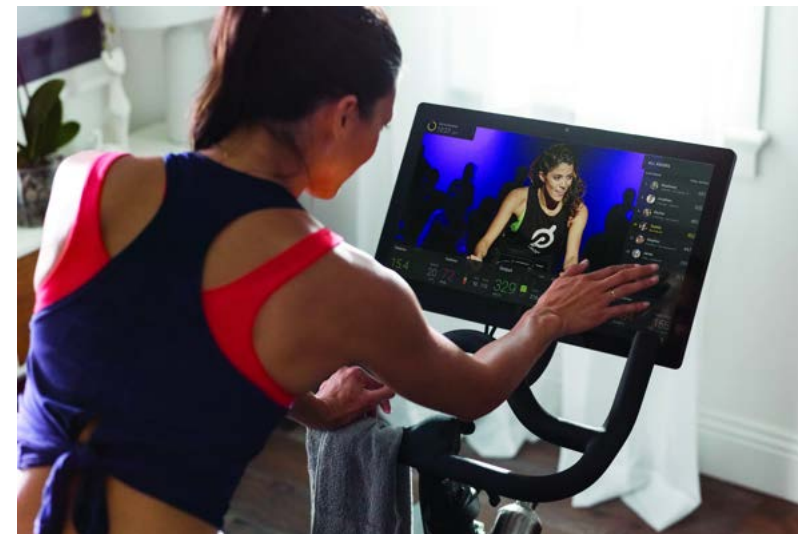
Top-Down
MASS MEDIA
(CPM Focused)



Social Media Engagement



Advocacy & Trust Focused



Virtualizing Experiences



1-2-1 at Scale (CRM)



Omni-Channel

TOTEM

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