



CHINA'S TWO-CHILD POLICY ERA PARENTS

SUPER MOMS AND DADS







HELLO!

The replacement of China's one child policy with the two child policy in 2015 gave a push to the maternity and infant care (MIC) market. Economists are also starting discussions about a possible three child policy to deal with China's aging population.

According to the National Bureau of Statistics, in 2019, there were 14.65 million babies born in China and sales in the maternity and infant care sector are expected to grow in the next 5-10 years so ChoZan has created this report to help marketers get the latest insights about moms and dads as modern Chinese consumers.

Ashley Galina Dudarenok

Founder, Alarice and ChoZan, LinkedIn Top Voice

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MARKET OVERVIEW





The growth of the maternity and infant care (MIC) sector is mainly fuelled by the Post-90s generation, who prefer to buy products online.

Post-90s super moms account for 70% of sales in this product category, according to data from JD.com. They've become a major market force, preferring trendy products while being less price-sensitive.

In 2019, revenue in the MIC market reached 2.9 trillion RMB.



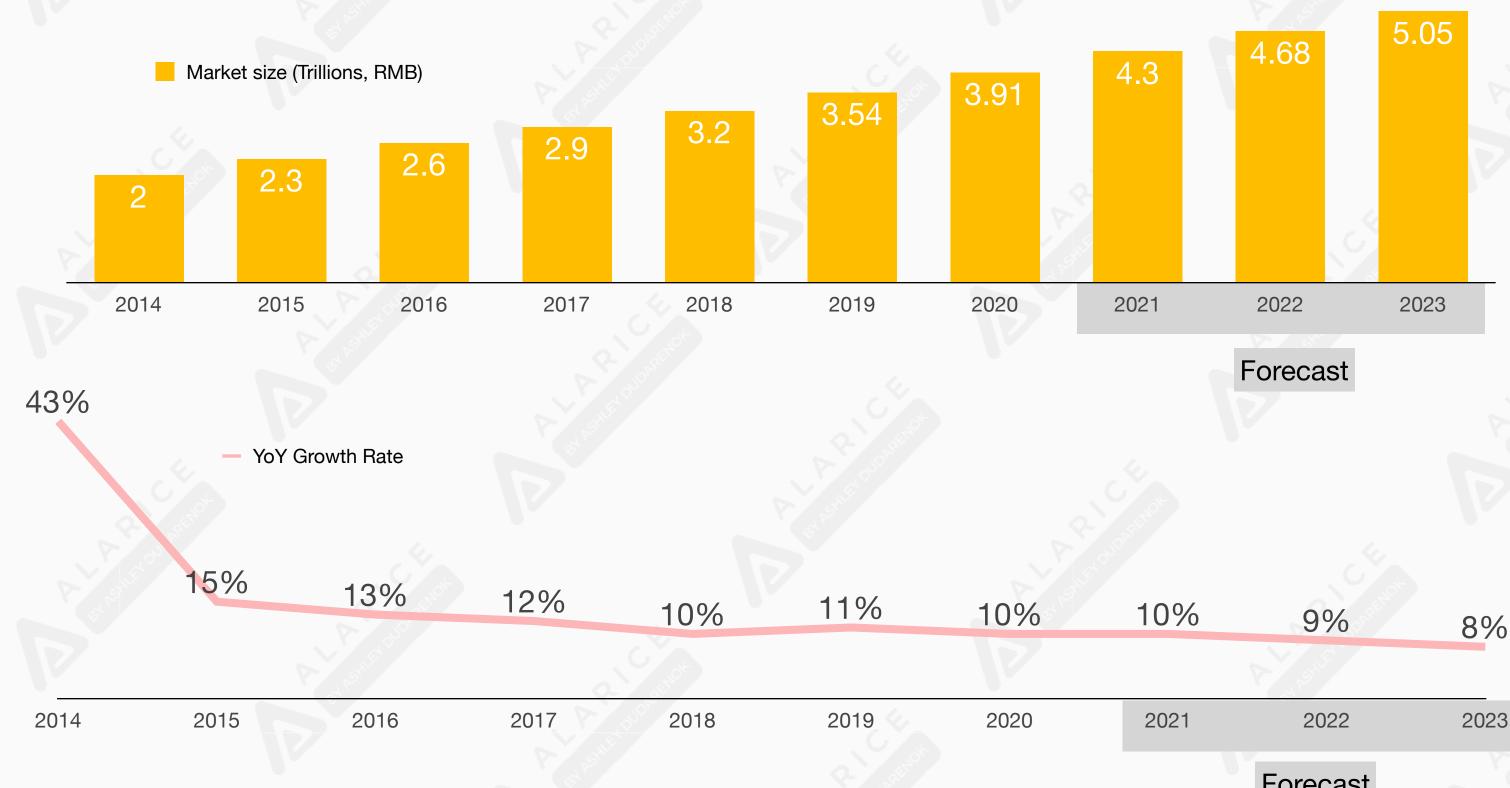




CONSUMER INSIGHTS SUPER MOMS - MIC MARKET GROWTH

The market for maternity and infant care (MIC) products is expected to maintain steady growth and reach approximately 3.91 trillion RMB in revenue by the end of 2020.

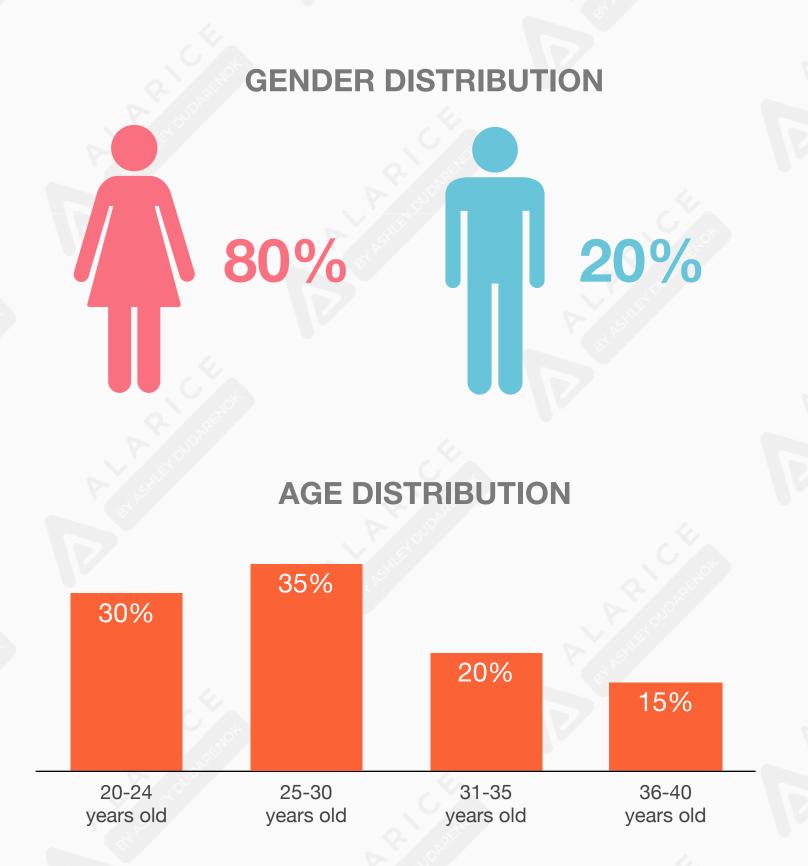
MIC MARKET SIZE AND YOY GROWTH RATE, 2020 MAY

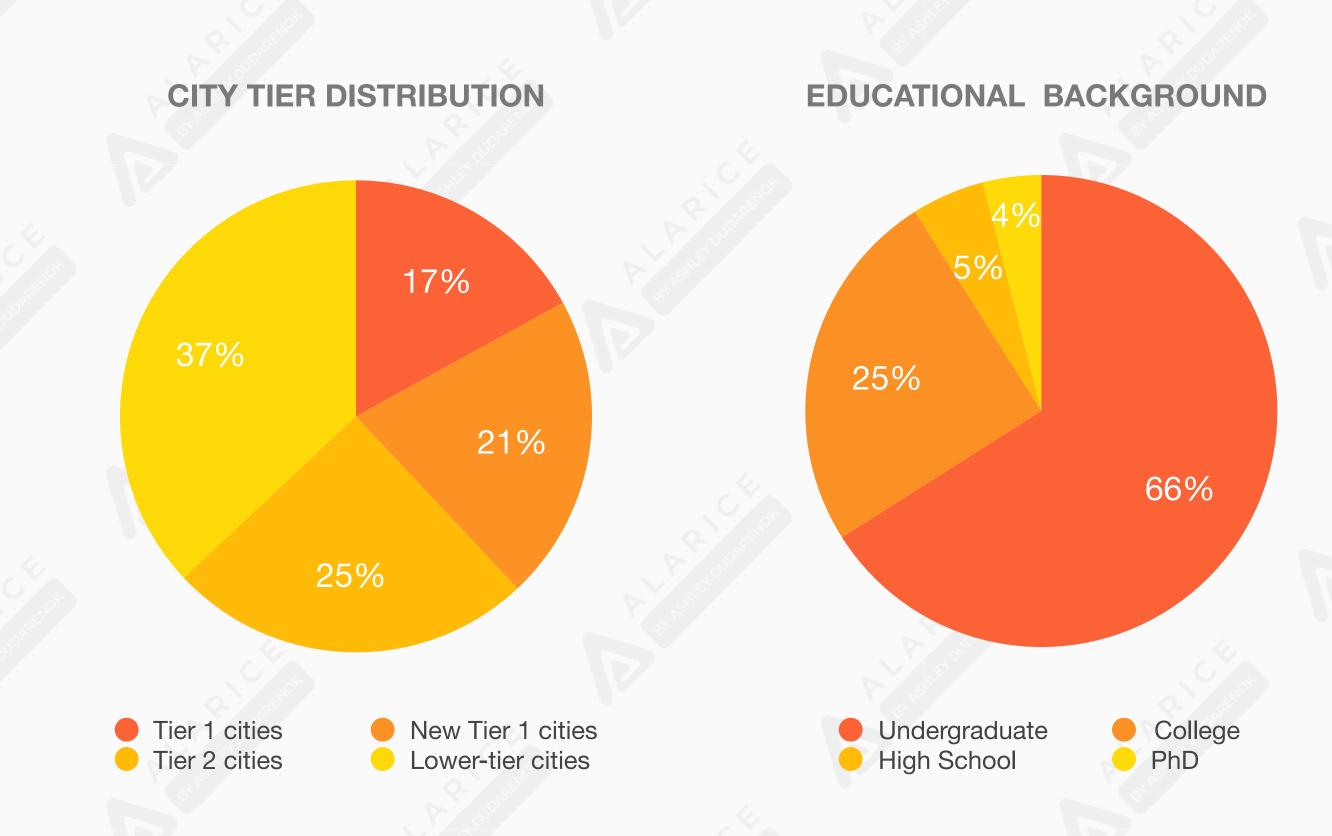






CONSUMER INSIGHTS MIC APP USER PORTRAIT





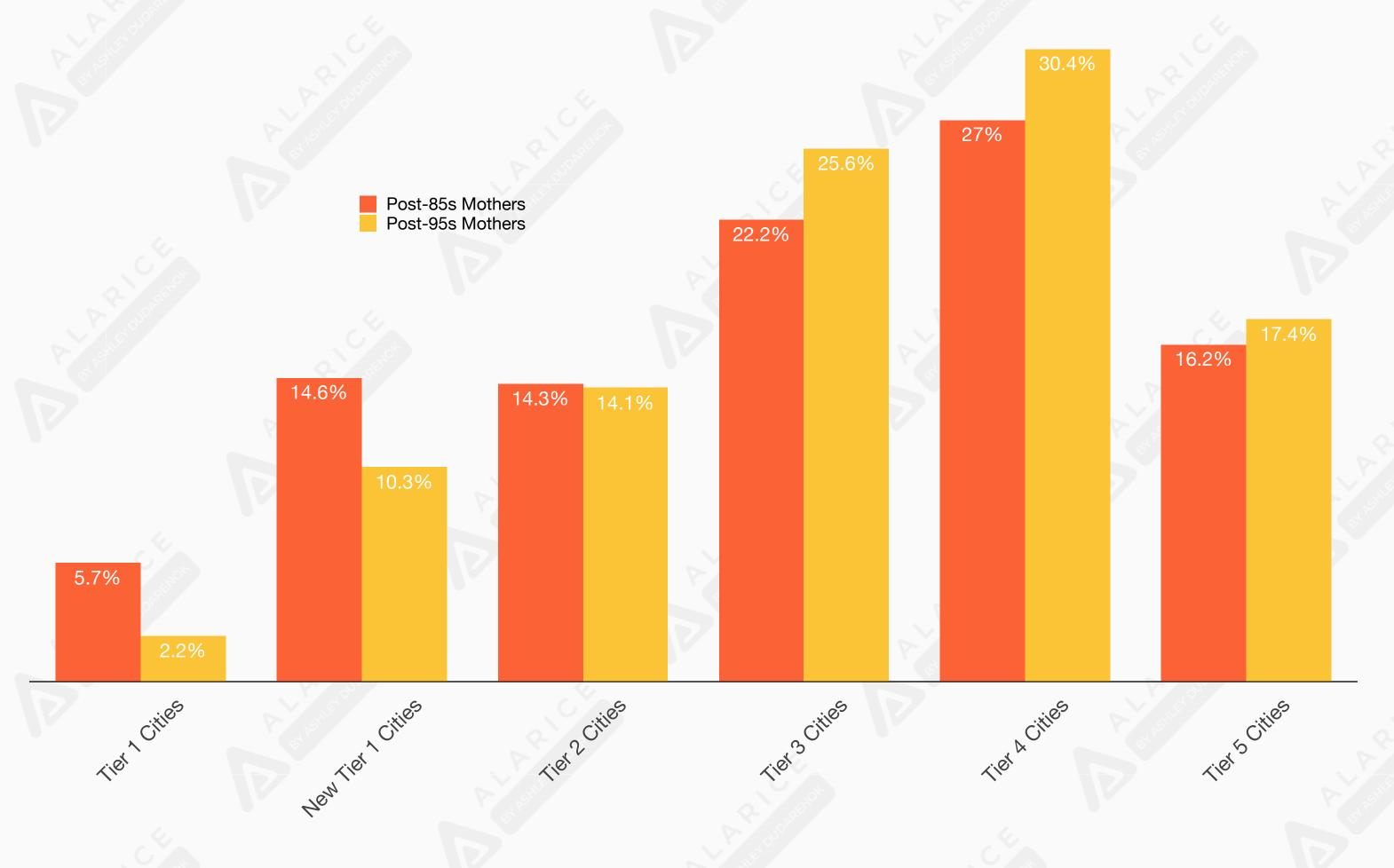




CONSUMER INSIGHTS SUPER MOMS - CITY DISTRIBUTION

As a result of lower costs of living in lower tier cities and a recent switch to the more lenient two child policy, there are more mothers and more young mothers in lower tier cities.

POST-85s AND POST-95s MOTHERS BY CITY TIER





EXPERT BITES

Q: WHAT ARE SUPER MOMS AND DADS FOCUSING ON IN 2020/21?

China's super moms and dads are realizing after lockdown that their children's social skills are really lacking, so the parents are now focused on introducing real life skills to their children.



JERRY CLODE
Founder of The Solution



CONSUMERINGUMER

UNDERSTANDING SUPER MOMS





SUPER MOMS AND DADS: INTRODUCTION

Interesting Facts

Parents with children aged 0-12 are the main group of mobile internet users, with 300 million active users online. According to QuestMobile, in April, the average monthly time spent on the internet by parents with kids aged 0-12 rose 13.1% YoY.

Similar to the overall structure of internet users, more than half of parents with kids aged 0-12 live in Tier 3 cities and below. Most of these parents were born in the 1980s and 1990s.

Shopping attitudes and behaviors

Expenditures on children account for a huge proportion of family incomes. Most families spend 1,000-5,000 RMB on children monthly. Expenditures on daily necessities and education is almost the same.

Parents with kids aged 0-12 purchase children's products mainly through e-commerce. Word-of-mouth and quality assurance are the essential factors for purchase decisions in children's products.

What are they interested in buying?

- 1) Children's clothing
- 2) Nutritious food and supplements
- 3) Educational products
- 4) High-tech wearable devices
- 5) Fitness related products





SUPER MOMS: KEY FACTS ABOUT AFFLUENT MOTHERS

Affluent mothers in China live by the word of mouth they read in trusted WeChat groups. They're keen to be in a WeChat group with their social peers. There's usually a a leader who makes recommendations based on what celebrities are doing.

Education and betterment is everything. Everything is upgrading and looking for a way to display the elite standing of oneself and one's child/children. This creates a reason to make luxury purchases.

For the right investment in their child's experience, there's no limit for affluent Chinese parents. No price is too great if it will deliver a truly elite, WeChat post-worthy moment for their child.





SUPER MOMS: EMERGING DEMOGRAPHICS

China is approaching a boom of Millennial mamas or, in their own words, Spicy Moms(辣妈) or Hot Mamas. These terms don't have the sexual connotations that their English translations do and are more about mothers who don't conform to traditional norms or feel obligated to give up their hobbies, interests or fashion sense just because they're mothers. They're the new generation of Post-90s moms.

To understand this new demographic of affluent, modern Chinese parents, luxury brands need to understand the size of the social shift. Imagine the difference in parenting in the West between the 1950s and the 1970s. We're talking about the first generation of parents that are asking new questions about parenthood, rather than simply accepting what was done before.

MILLENNIAL MAMAS





SUPER MOMS: PRIORITY ORIENTED

They turn to other Millennial moms, rather than their own parents, for parenting advice.

They are less sensitive about price, and more concerned about product safety and quality.

They feel entitled to self-care and self-love.

They see investment in premium brands as a necessity for themselves and their kids.

They love to shop for high-quality kids products via cross-border e-commerce.

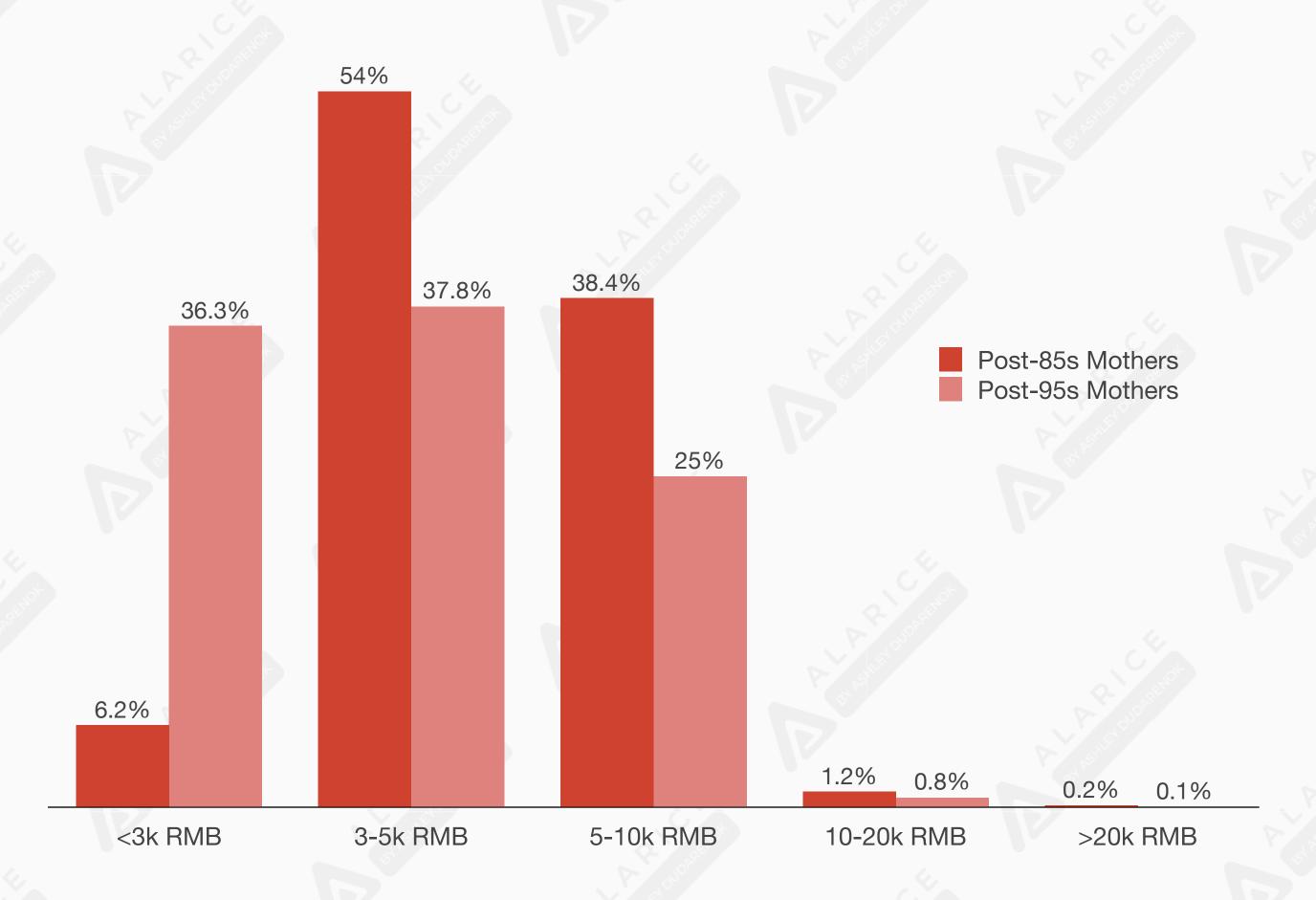




CONSUMER INSIGHTS SUPER MOMS - INCOME

While Post-85s mothers have higher incomes, Post-95s mothers are catching up in some income brackets.

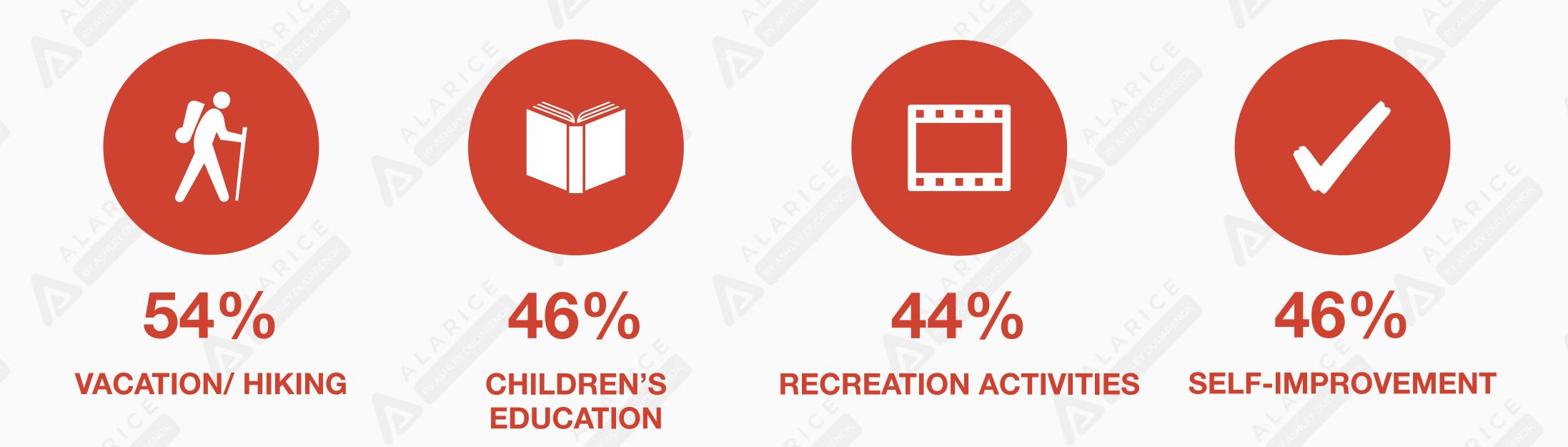
POST-85s AND POST-95s MOTHERS' MONTHLY INCOME





SUPER MOMS: SPENDING PREFERENCES

Chinese women's choice of spending for the coming year can be broken down into four key areas according to Nielsen China:



Chinese women have begun to place value on autonomy, ego, and confidence. Brands should focus marketing resources on these labels in order to successfully captivate female consumers.

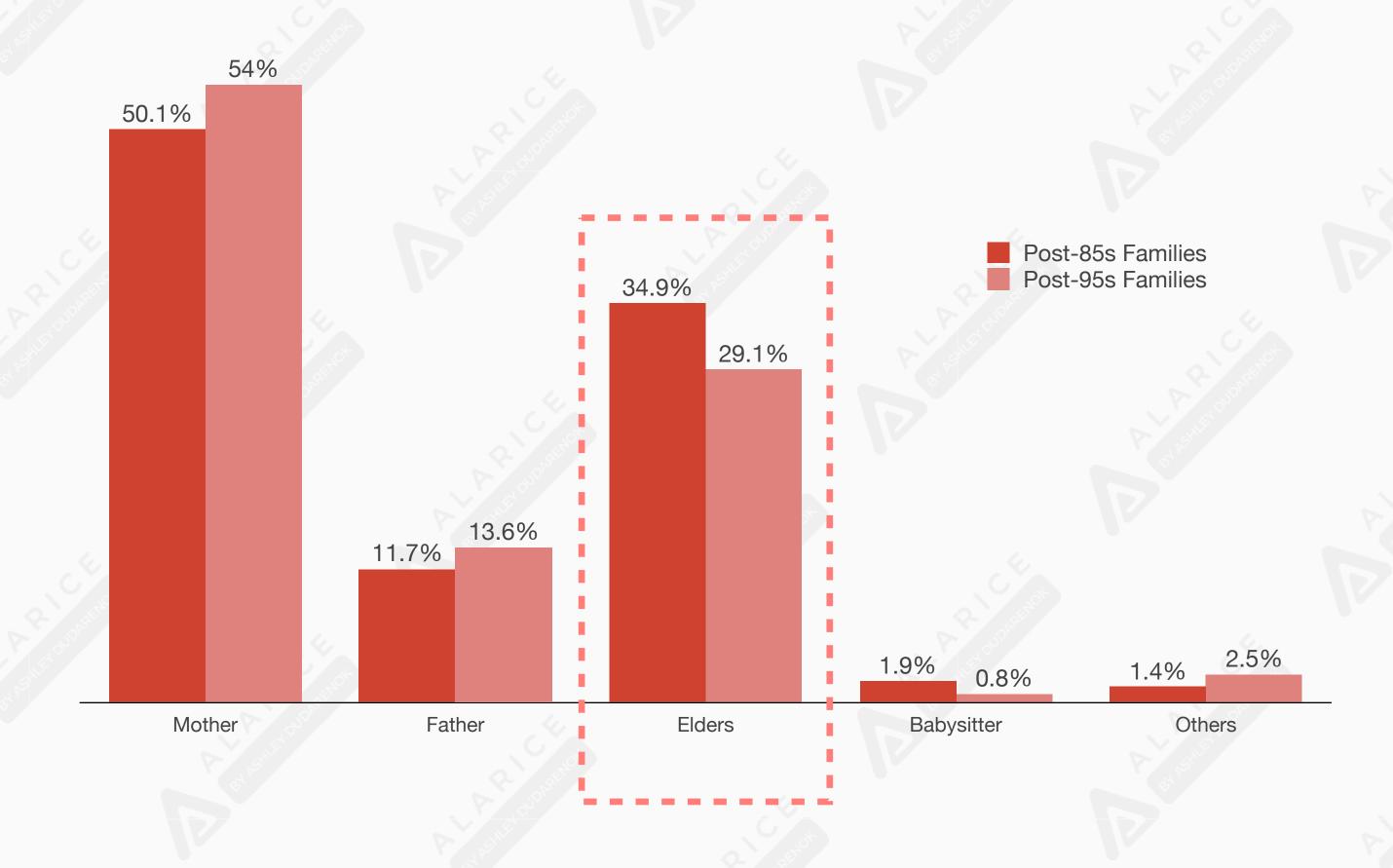




CONSUMER INSIGHTS SUPER MOMS: CHILDCARE

Younger generations are willing to work harder, and are less likely to ask elders for help with childcare.

POST-85s AND POST-95s MOTHERS ARE USUALLY IN CHARGE OF CHILDCARE







SUPER MOMS: POST-90'S MUMS

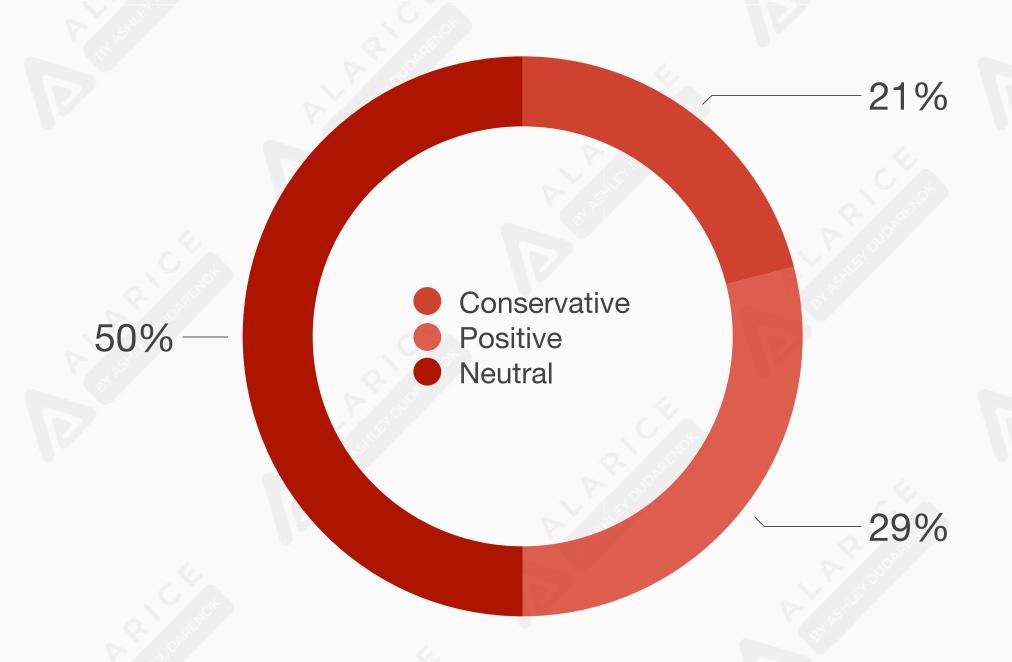
Positive consumption attitudes and strong spending power among parents have consolidated the firm position of the MIC market.

According to Myguancha, from 2018 July to 2019 June, more than 80% of consumers in the MIC market were Post-80s and Post-90s parents. The same pattern appeared in Douyin's statistics - 37% of maternal and child product consumers are from the Post-80s generation while more than 61% are from the Post-90s group.

The consumption attitudes of these groups is much more positive than the last generation, due to their exposure to China's economic reforms and opening-up.

Overall, more than 69% of these mothers spend up to 30% of family income on products for themselves as mothers or their children.

DOUYIN MOTHERS' ATTITUDES TO BUYING MIC PRODUCTS

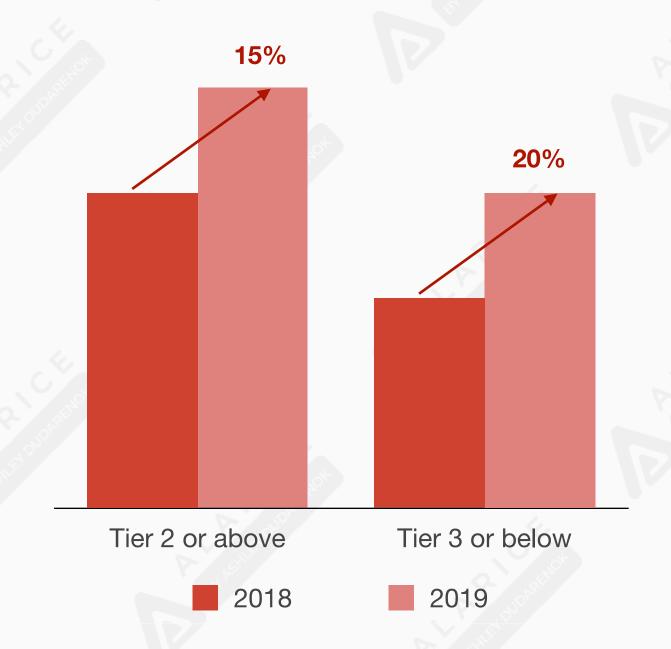




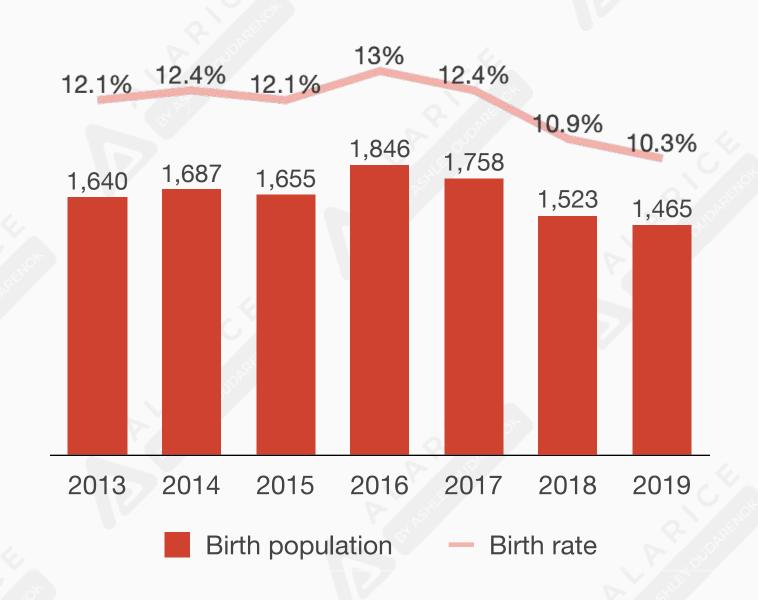


SUPER MOMS: MATERNITY AND INFANT CARE PRODUCTS

MIC MARKET PENETRATION GROWTH RATE BY CITY TIER



BIRTH POPULATION AND RATE IN CHINA (2013-2019)



CHILD POPULATION GROWTH TRENDS IN THE NEXT 5 YEARS









UNDERSTANDING SUPER DADS





SUPER DADS: THE NEW DAD

THE "NEW DAD"



YOUNGER BECOMING YOUNGER ON AVERAGE, MOSTLY 25-40



TASTEPAYS ATTENTION TO PRODUCT QUALITY,
MORE SOPHISTICATED TASTES





CONSUMER INSIGHTS SUPER DADS: NEW DAD PREFERENCES

According to data from iiMedia Research, in addition to parenting and children's products, new dads tend to invest in men's clothing, personal care items, as well as sports and fitness products.

Respondents spent more than 400 RMB per month on accessories and personal care items. In addition to parenting, they seem keen to maintain their appearance and quality of life.

FOUR MAJOR AREAS OF NEW DAD EXPENSES IN 2020 (MORE THAN 400 RMB MONTHLY)



52.6%

BABY PRODUCTS



34.7%

PERSONAL CARE



38.7%

MENSWEAR



31.9%

SPORTS AND THE GYM

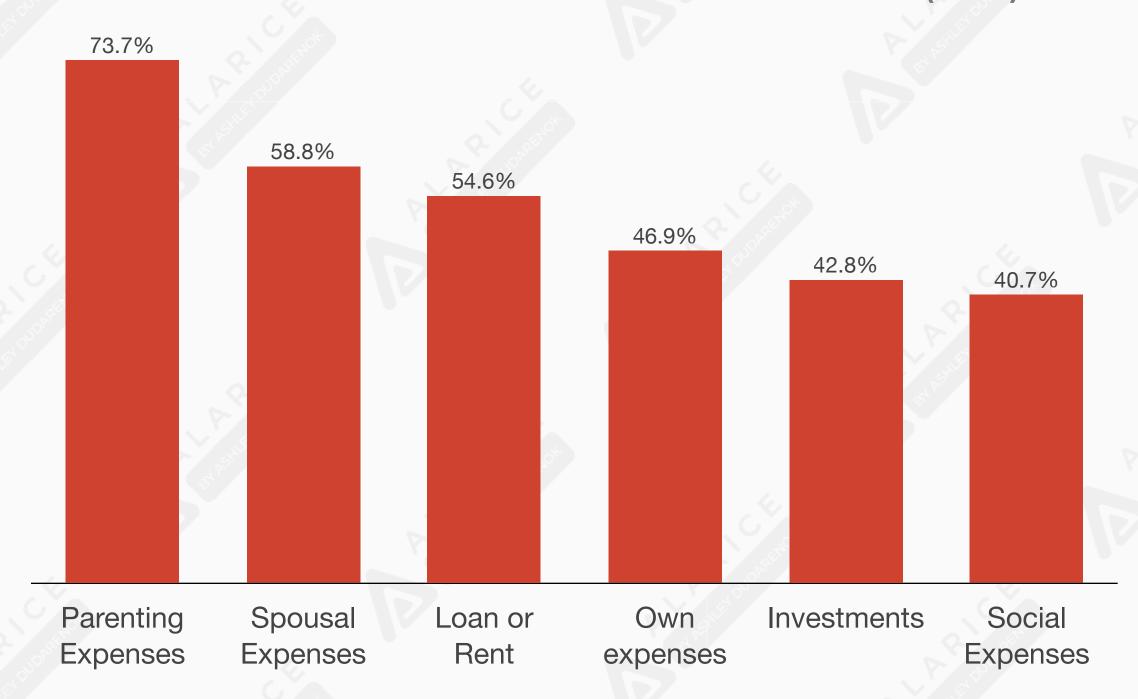




CONSUMER INSIGHTS SUPER DADS: NEW DAD PURCHASES

Unlike the traditionally solemn, stereotyped image of fathers from the older generation in the 50s and 60s, Post-80s and Post-90s new dads have a different character and new consumption concepts.

NEW DAD CONSUMPTION FREQUENCY BY CATEGORY (2020)

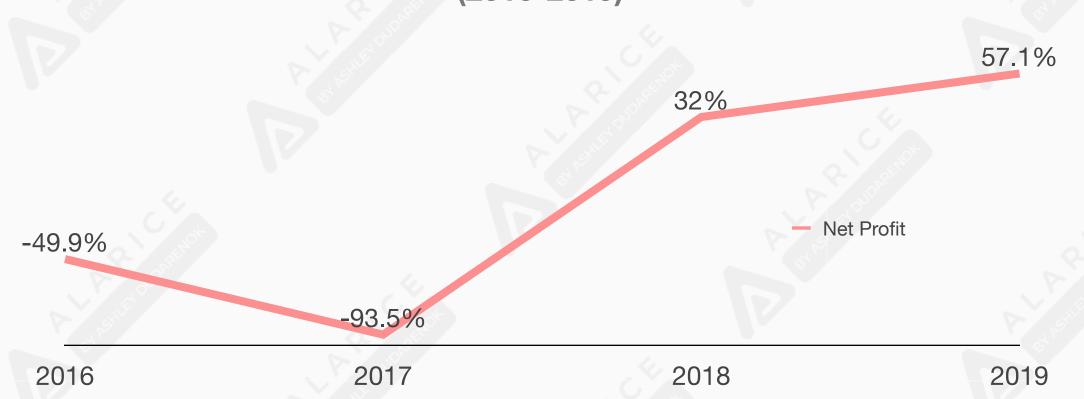




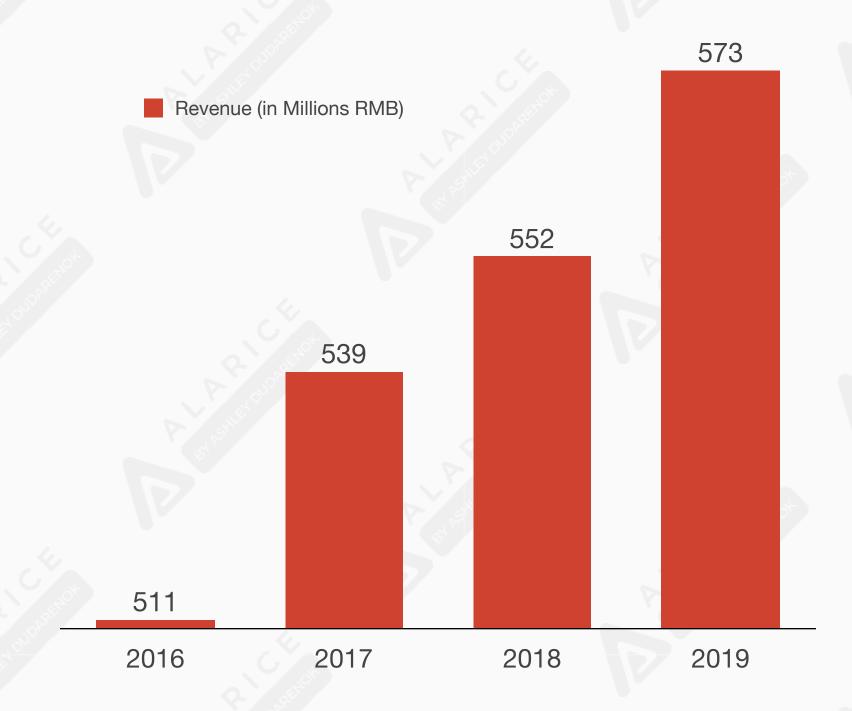
SUPER DADS: DADS BUYING INFANT PRODUCTS

Data shows that dads making purchases of baby products grew from 2016 to 2019. Diaper brand Daddy Baby had income reaching 573 million RMB in 2019. Experts believe that there's huge potential for the domestic infant product market, as well as increasing consumption power and more new dads buying diapers, influencing and motivating the market.





DADDY BABY REVENUE (2016-2019)







SUMMARY

KEY CHARACTERISTICS OF FUN DADS IN THEIR LATE 30s TO MID-40s

SELF-DETERMINED CONSUMPTION

Clear individual attitudes.
Not easily influenced.
Passionate about
self-exploration.

CULTURE ORIENTED CONSUMPTION

More concerned about cultural value than material value.

SCARCITY ORIENTED CONSUMPTION

Prefers exclusive or limitededition, creative, foreign merchandise.

KEY CHARACTERISTICS OF SMALL-TOWN MOMS

PREMIUM CONSUMER

Willing to overpay just to ensure authenticity and wide variety.

SOCIAL CONSUMER

Must let the world know what she just bought.

ANXIOUS CONSUMER

Worries about their child's growth but is also concerned about their own appearance.





EXPERT BITES

Q: HOW DO YOU SEE SUPER-DADS IN 2020/21?

China's super moms and dads in 2020 are both **very involved in the child-raising process**. JD Super hosted a Super Dads Festival sales event which featured selected parenting and baby products for 9.9 RMB, live-streaming with famous celeb dads, and dedicated dad shopping and gaming activities.



ELLA KIDRON
Global Corporate Affairs,
JD.com





EXPERT BITES

Q: WHAT'S YOUR FAVOURITE CONSUMER GROUP IN CHINA IN 2020?

I love young connoisseurs. They come in many forms but I'm especially keen on the "New Milk Dads." They're digital natives, extremely curious and open-minded, sensitive to trends and they put as much importance on their children as they do their own health and wellbeing. They're self-trained experts in all that they consume and join communities of like minds. They power category leadership positions for more than half of the brands we manage.



JOSH GARDNER
CEO KUNG FU DATA

SOCIAL MEDIA





MAJOR MIC MARKET PLATFORMS IN CHINA (2020)

VERTICAL MEDIA



NON-VERTICAL MEDIA



NEW MEDIA

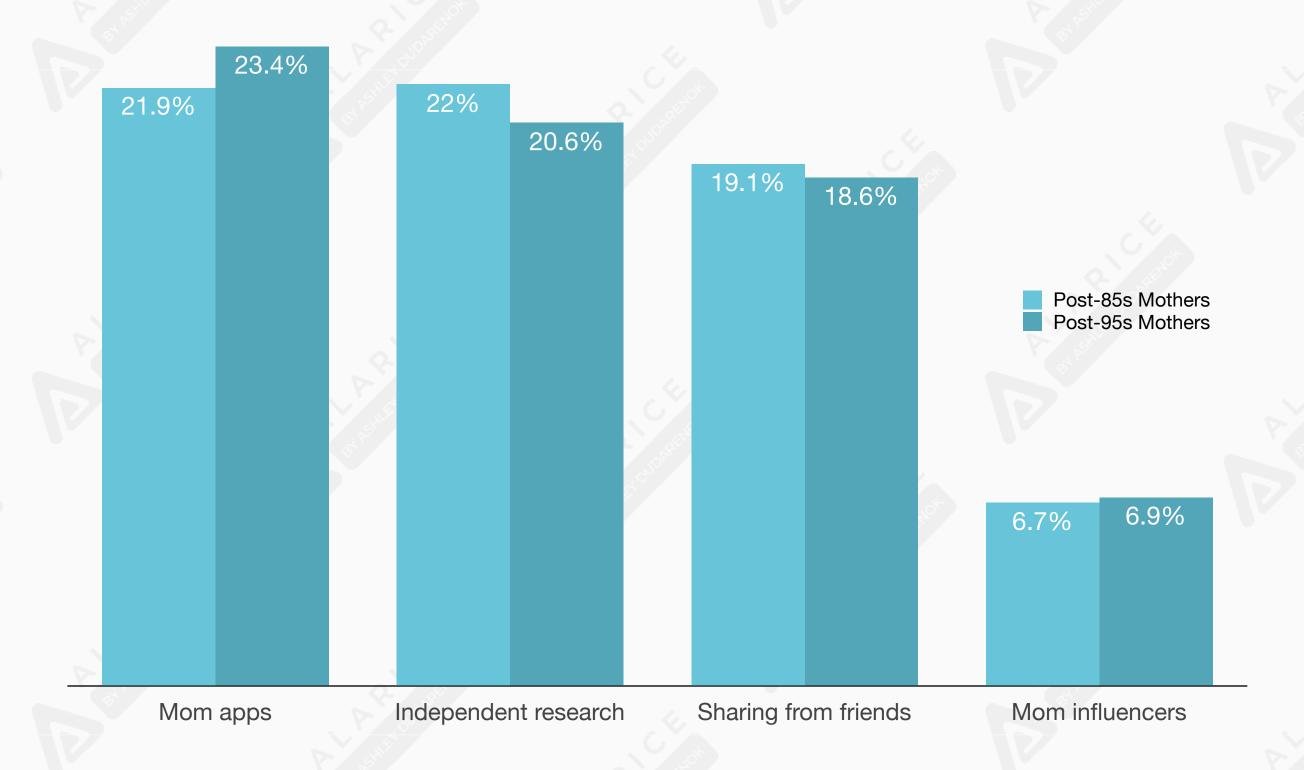






Post-85s and Post-95s mothers value apps, independent research and recommendations from friends the most. Post-95s mothers rely a bit more on apps while Post-85s mothers trust their own independent research to a slightly greater degree.

POST-85s AND POST-95s MOTHERS TOP 4 INFORMATION CHANNELS

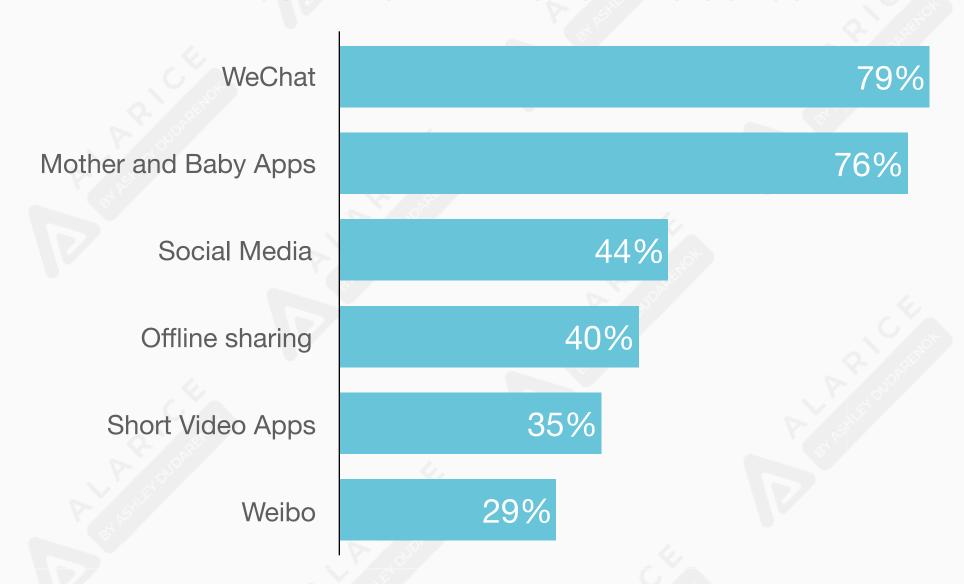






MIC consumers mainly use WeChat and apps for mothers and parents to share information, mainly maternity questions and pregnancy experiences. 64% of MIC consumers share information.

2020 SOCIAL CHANNELS FOR MIC CONSUMERS



2020 MIC CONSUMERS SOCIAL SHARING BEHAVIOUR

79%

ASK PREGNANCY
QUESTIONS AND
GET ADVICE

60% SHARING FEELINGS 64%

PREGNANCY EXPERIENCE SHARING

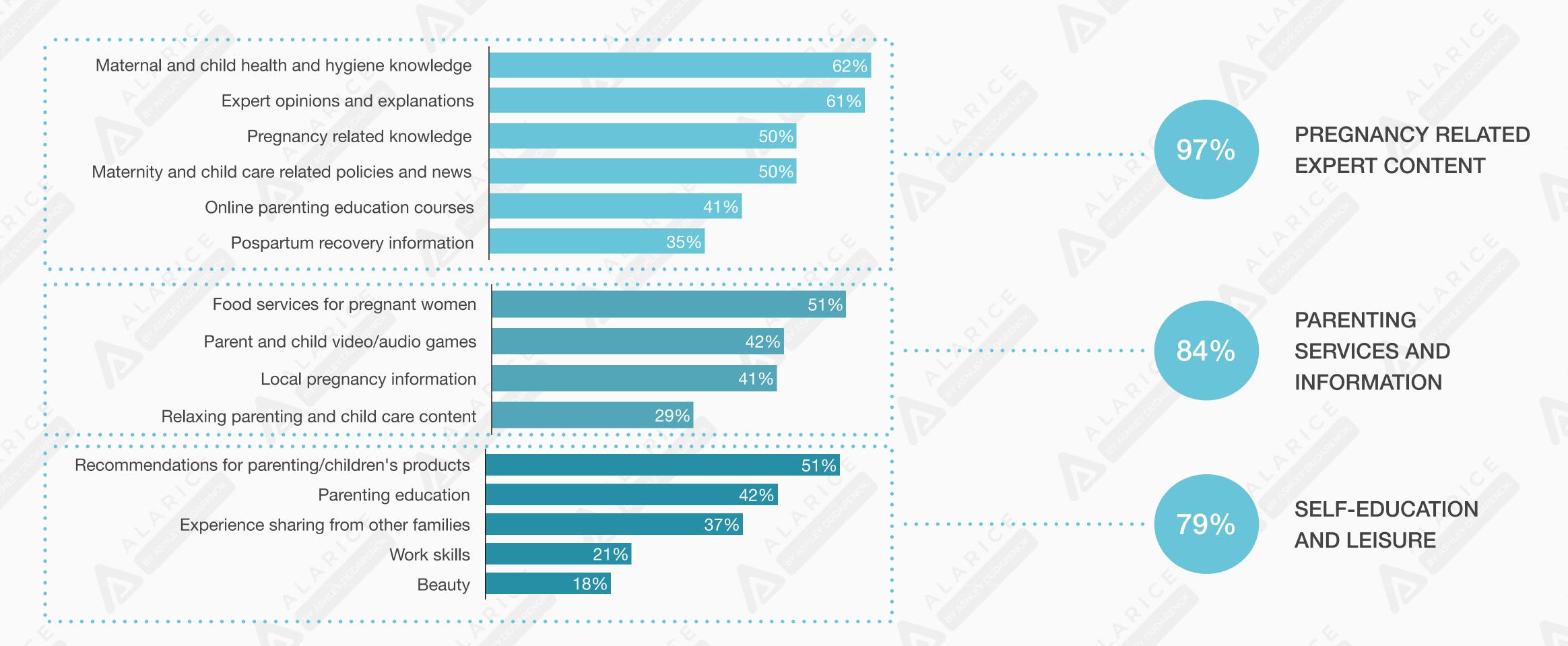
57%

"SHARENTING"





The kind of information that MIC consumers are looking for falls into 3 main groups and other smaller sub-groups as follows.

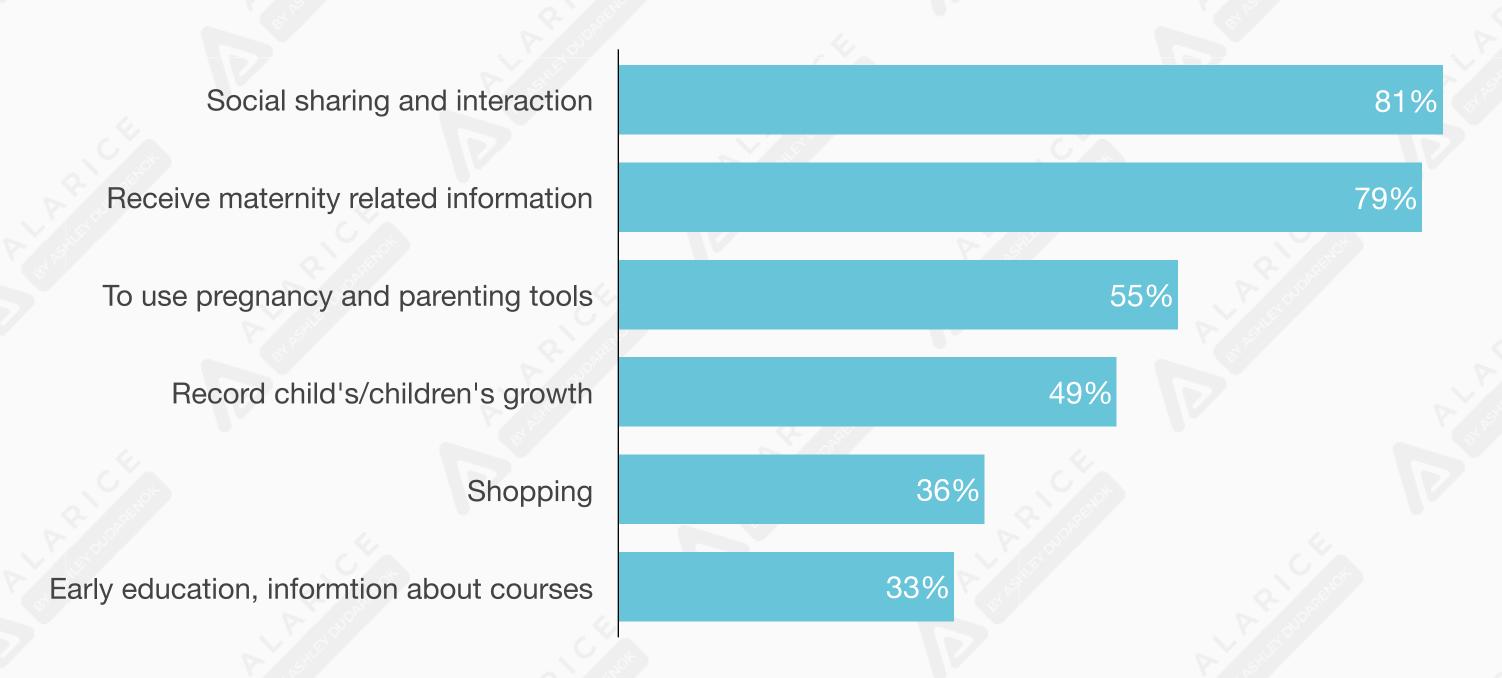






Most mothers use apps to stay in contact with friends and other moms and to receive maternity related information.

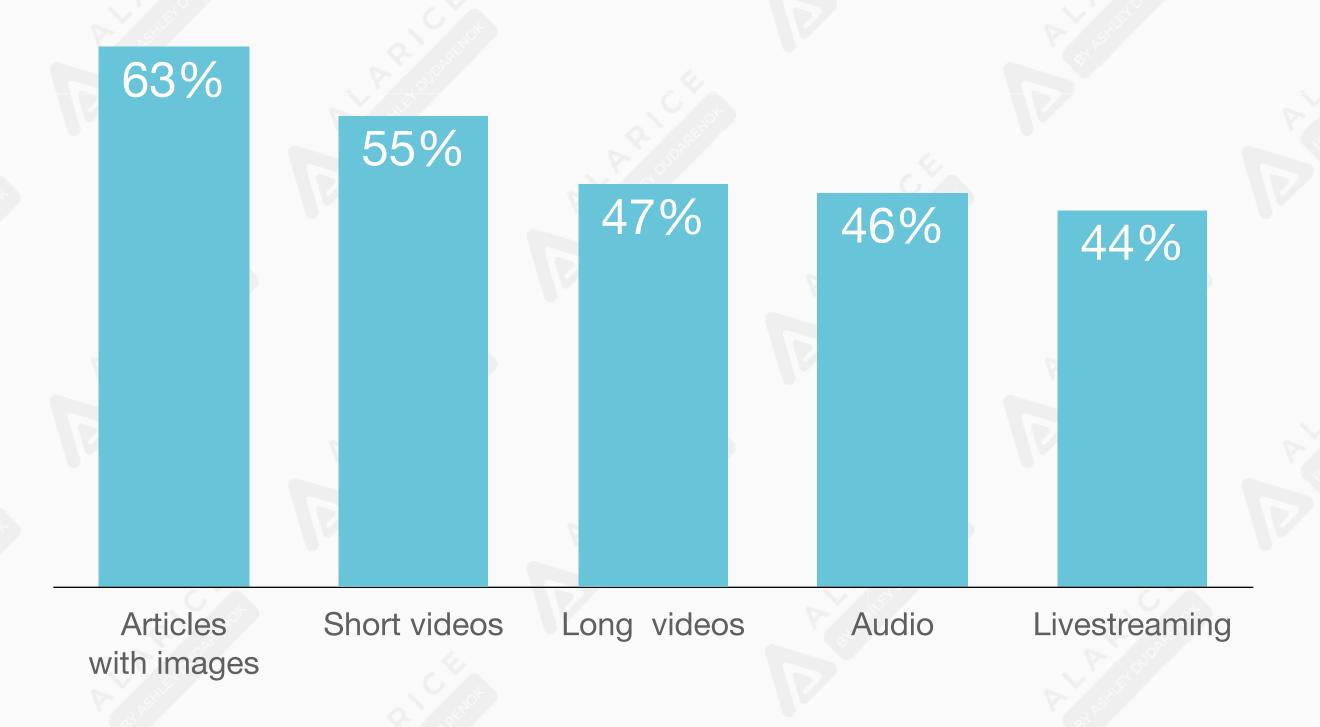
MAIN REASON FOR USING MATERNITY APPS 2020





Mothers prefer articles with images and short videos when they're gathering information and doing research.

MOST POPULAR FORMATS FOR INFORMATION GATHERING

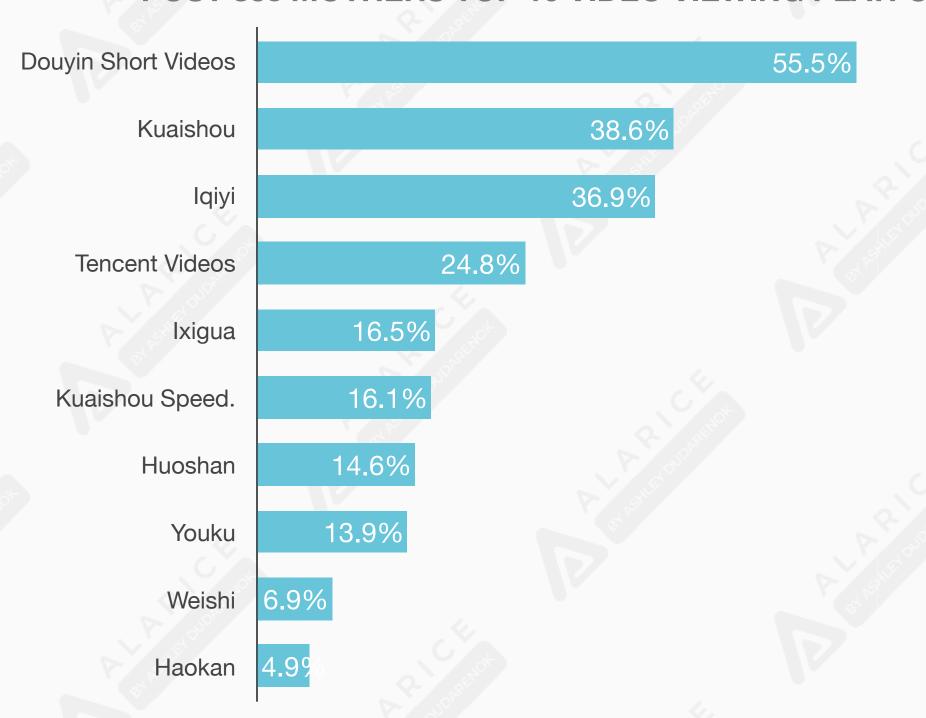




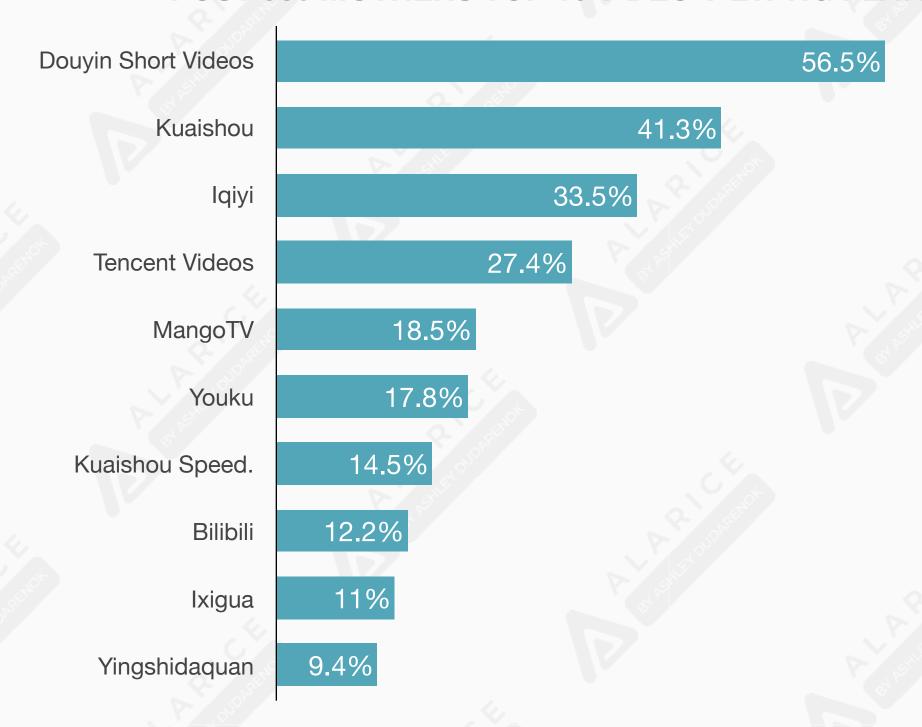


There's a high degree of similarity in terms of video platform preferences with Douyin and Kuaishou on top for both Post-85s and Post-95s mothers.

POST-85s MOTHERS TOP 10 VIDEO VIEWING PLATFORMS



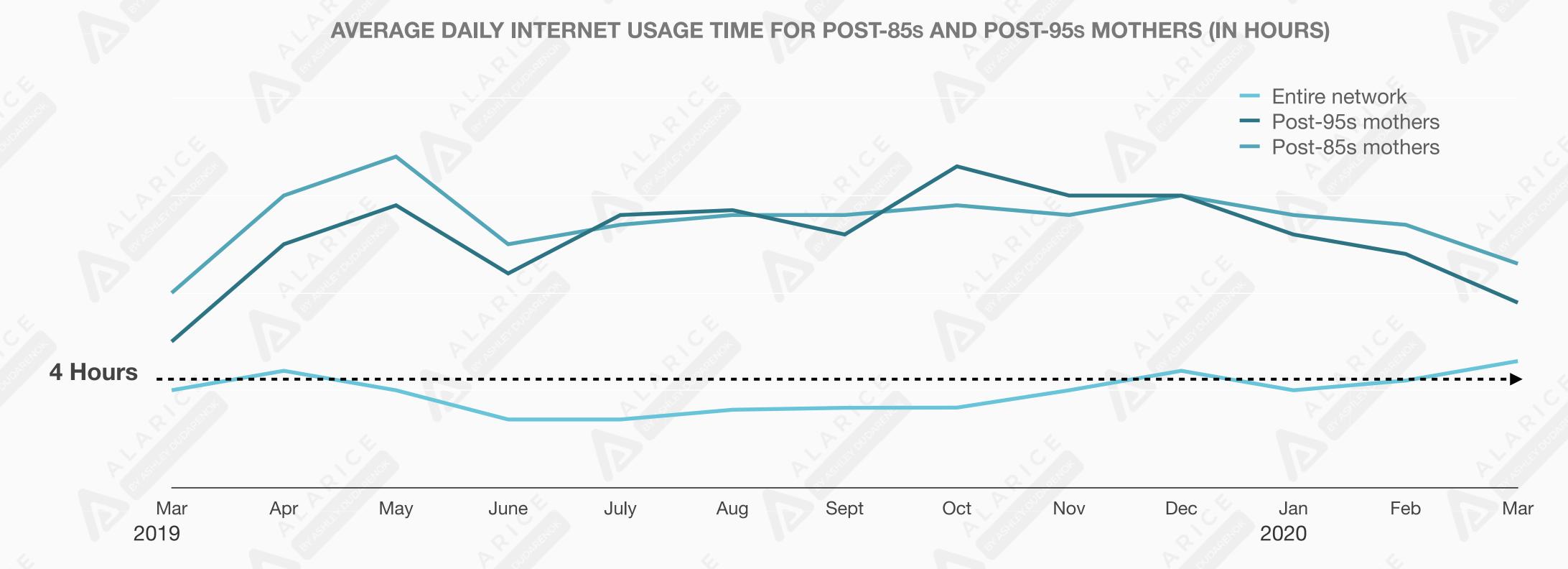
POST-95s MOTHERS TOP 10 VIDEO VIEWING PLATFORMS







Chinese mothers are heavy internet users. The average daily internet usage time for Post-85s and Post-95s mothers is higher than average.

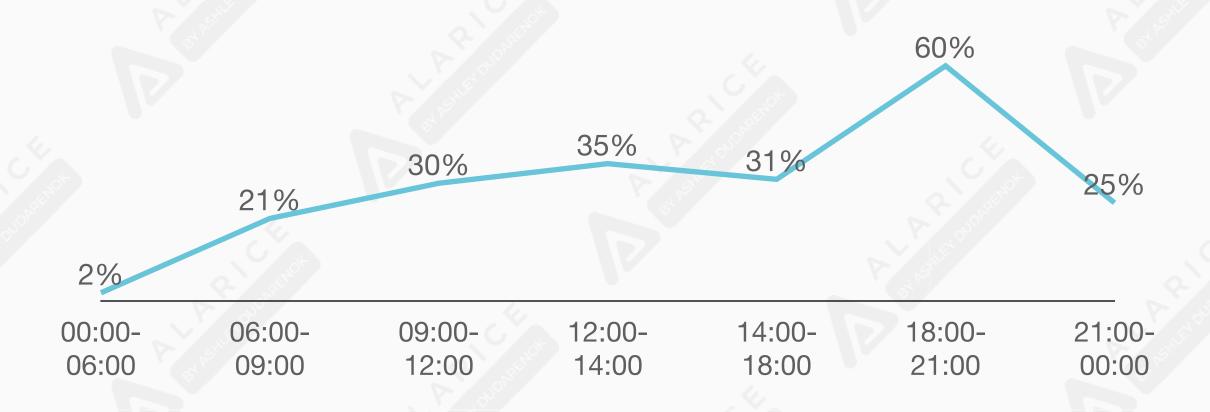




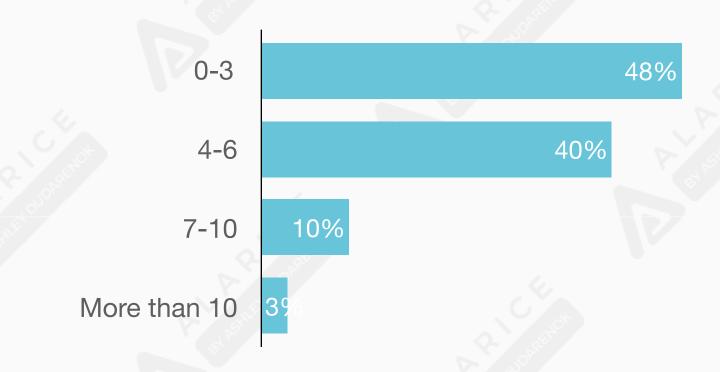
SOCIAL MEDIA INSIGHTS

Maternity and infant care consumers are most active online between 6 and 9pm. The average usage time for apps is 48 minutes and the average number of apps used per day is 4.6.

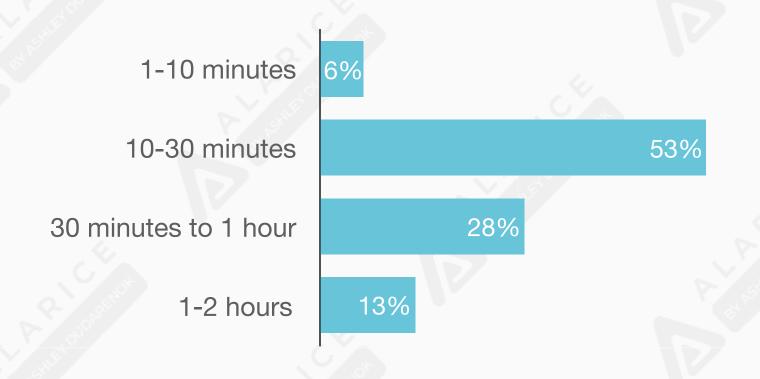
MIC CONSUMER ONLINE ACTIVITY RATES BY TIME OF DAY



NUMBER OF APPS USED PER DAY



AMOUNT OF TIME SPENT ON APPS PER DAY



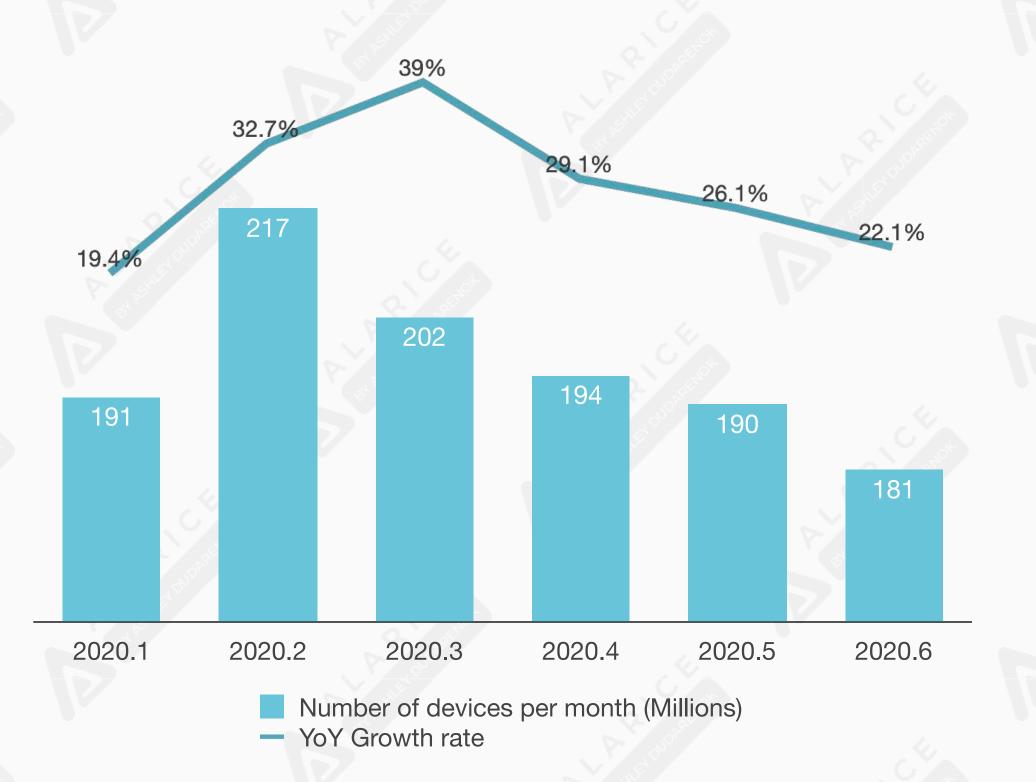


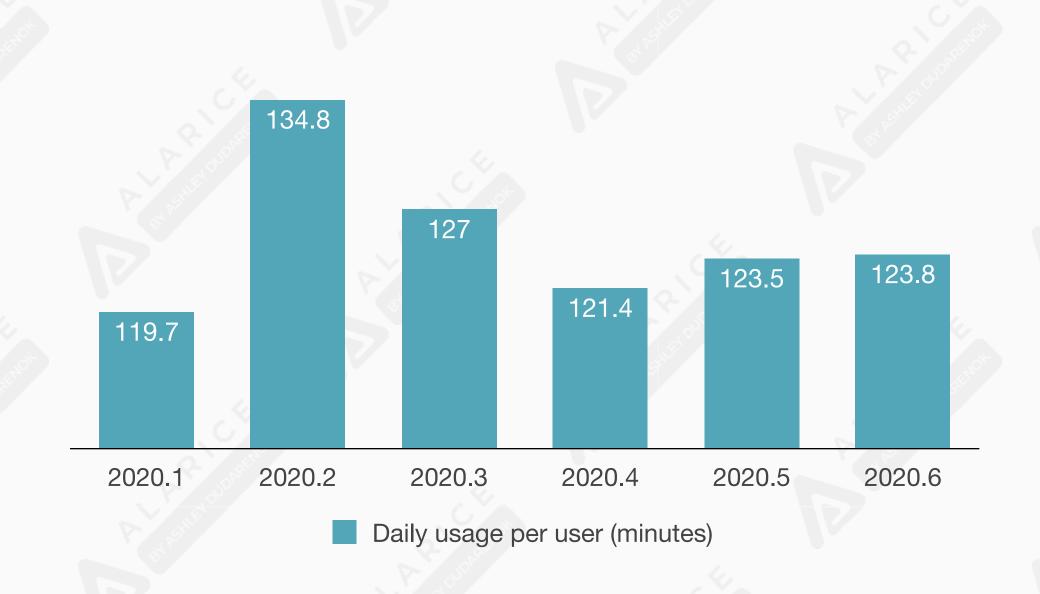


SOCIAL MEDIA INSIGHTS

Maternity and infant care consumers are big fans of online videos. In the first half of 2020, MIC users maintained strong interest in online videos with their average daily viewing time being higher than average.

MATERNITY/INFANT CARE ONLINE VIDEO PLATFORM USAGE STATISTICS FROM JAN-JUN 2020







SOCIAL MEDIA: KUAISHOU





In 2020, Kuaishou became a popular as a platform for MIC communities.

1 200%

NUMBER OF MOTHER AND BABY VIDEOS ON KUAISHOU (MAR-AUG 2020)

1115%

NUMBER OF MOTHER AND BABY LIVESTREAMS ON KUAISHOU (JAN-AUG 2020)







MIC users on Kuaishou can be divided into the following categories:

TRADITIONAL MOTHERS



93% of Kuaishou maternal and child products buyers are female.

HUSTLING CITY MOMS



Have strong consumption power.
Their per capita purchase price is relatively high.

SMALL TOWN MOTHERS



Mothers from small cities buy the most Kuaishou maternal and baby products.

SECOND CHILD MOTHERS



Have parenting experience, more accurate with their purchasing decisions.

CITY DADS



Willing to record their child and parenting experiences more.

Fathers from big cities are more active.





KUAISHOU'S MIC MARKETING MODEL 2020

TRAFFIC + CONTENT COMBINATION

CONTENT POOL

CREATORS

BGC

CELEBRITIES

PGC

MCN

PUGC

KOL

UGC

KOC

LIVESTREAMING

SHORT VIDEO PROMOTIONS

SHORT VIDEO +

TRAFFIC PROMOTION

SECONDARY VIEWING

LIVESTREAMING

BY OFFICIALS

\$\display \text{\$\display \tex

BY CELEBRITIES

BY KOLS

BY KOCS

ONLINE + OFFLINE

ONLINE E-COMMERCE

KUAISHOU SHOPS

YOUZAN SHOPS

EXTERNAL LINKS

020

OFFLINE

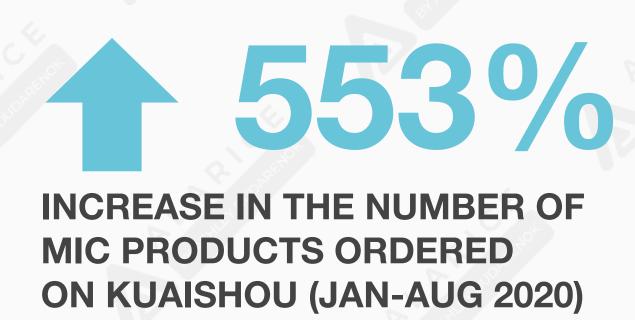
PHYSICAL STORE

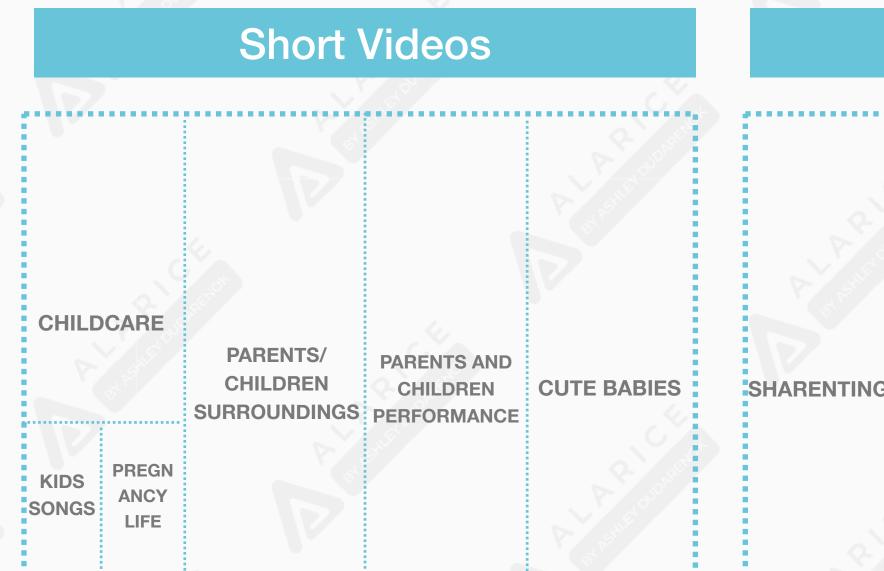
PROMOTION EXHIBITION





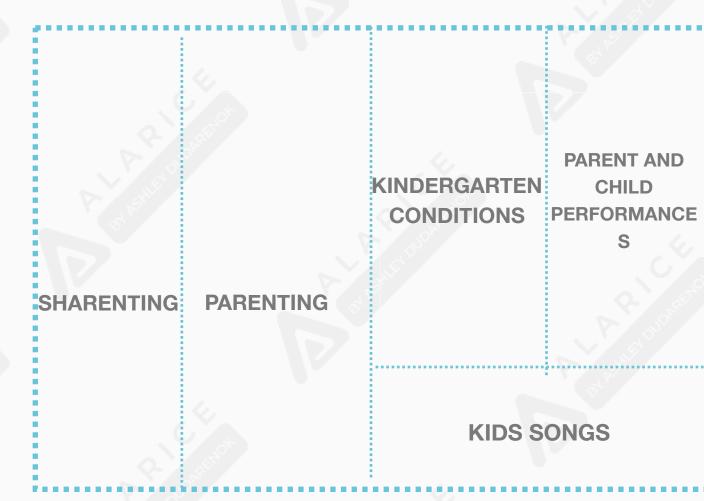
From January to August mother and baby product orders have grown 5 fold.





- FOURTH-TIER CITIES POST-00s LIKE VIDEOS WITH CUTE BABIES
- NEW **FIRST-TIER CITY POST-90**s HAVE HIGH SHORT VIDEO PLAYBACK RATES
- THIRD-TIER CITY POST-80s ARE THE CREATORS OF MOST PARENT / CHILD RELATED VIDEOS
- THIRD AND FOURTH-TIER CITY POST-60s AND 70s
 HAVE HIGHER SHORT VIDEO PLAYBACK RATES
 THAN YOUNG PEOPLE

Livestreaming



- POST-00s LIKE WATCHING VIDEOS WITH TWINS
- POST-90s LIKE WATCHING VIDEOS ABOUT KINDERGARTEN
- POST-80s ARE MAINLY LIVE BROADCASTERS



EXPERT BITES



STELLA ZHANG

Social Media Marketing Manager at Alarice and ChoZan

Q: HOW CAN MARKETERS CONNECT WITH CHINESE MOMS AND DADS TO PROMOTE BABY PRODUCTS?

Use professionally generated content and cooperate with KOCs to recommend high-quailty products. Chinese moms and dads trust advice from experts, professional institutes and experienced consumers. Create diversified consumption scenarios to connect with consumers, arouse interest and build brand awareness. For example, 3D interactive technology can be used to display products, so that consumers can simulate the experience of using the products online. Telling a story that clearly presents a product's unique selling points, and impart useful knowleage through short videos. They're an indispensable channel for this kind of product information. And build private communities on Chinese social media platforms to manage consumer relationships.

SOCIAL MEDIA: DOUYIN





DOUYIN MIC CONSUMERS CONSUMPTION ATTITUDES 2020

50%

Standard: They try to satisfy their own and their family members' needs

29%

Positive: They're willing to spend money on all kinds of products for themselves and family members

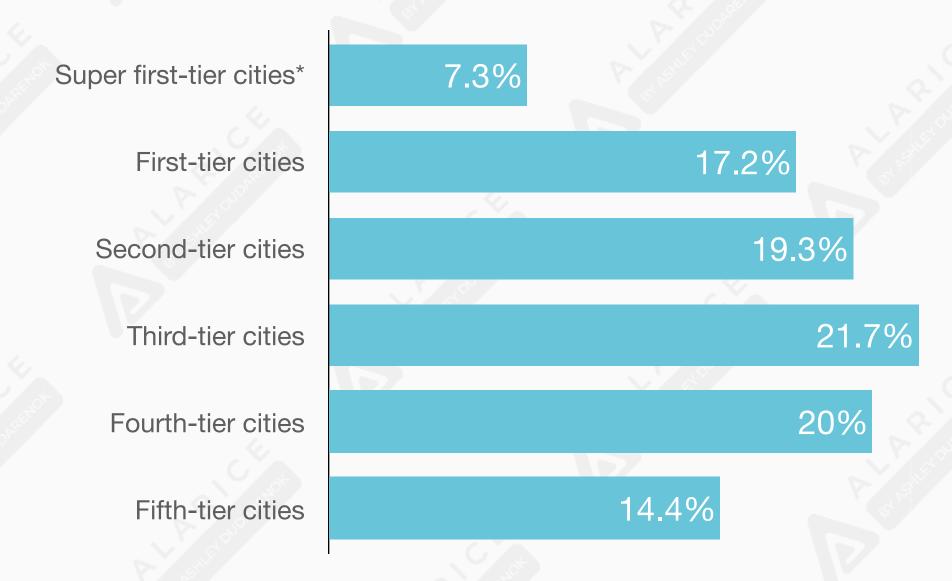
21%

Conservative: They buy goods for themselves and family members based on price and necessity



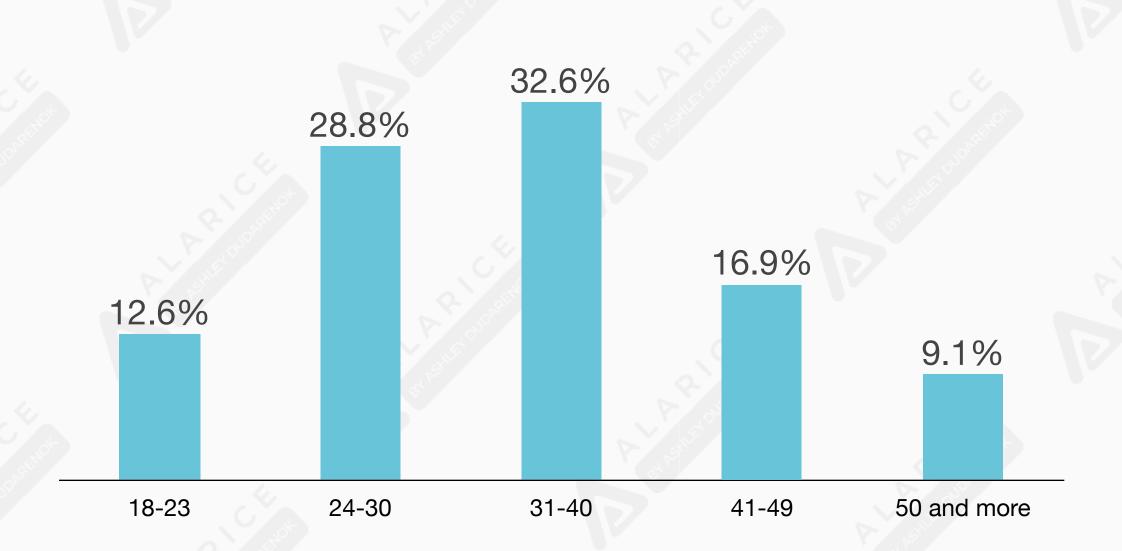
Douyin is the favourite short video platform of MIC consumers.

DOUYIN MIC CONSUMERS BY CITY TIER (2020)



^{*} Beijing, Shanghai, Guangzhou and Shenzhen

DOUYIN MIC CONSUMERS BY AGE DISTRIBUTION (2020)







A large proportion of MIC users on Douyin are preparing for a second child and paying great attention to their nutrition.

DOUYIN MOTHER DISTRIBUTION

52% 27%

HAVE 1 OR EXPECTING 1ST BABY

HAVE 2 BABIES

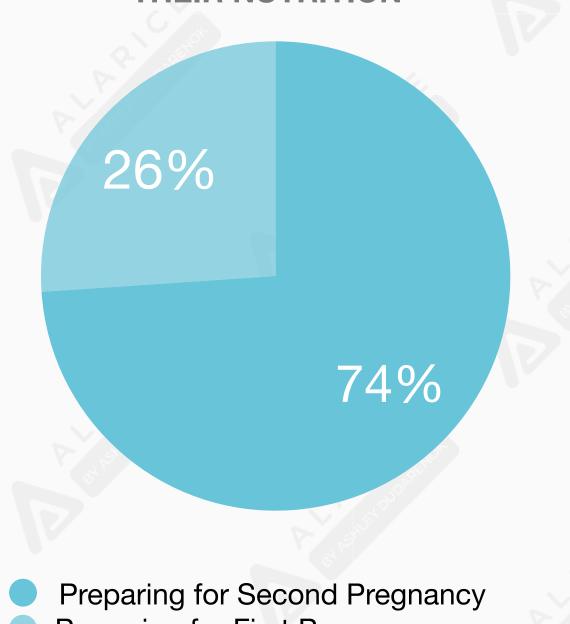
17%

ARE EXPECTING OR PREPARING FOR 2ND **BABY**

3%

PREPARING FOR **PREGNANCY**

RATIO OF MOTHERS PAYING ATTENTION TO THEIR NUTRITION

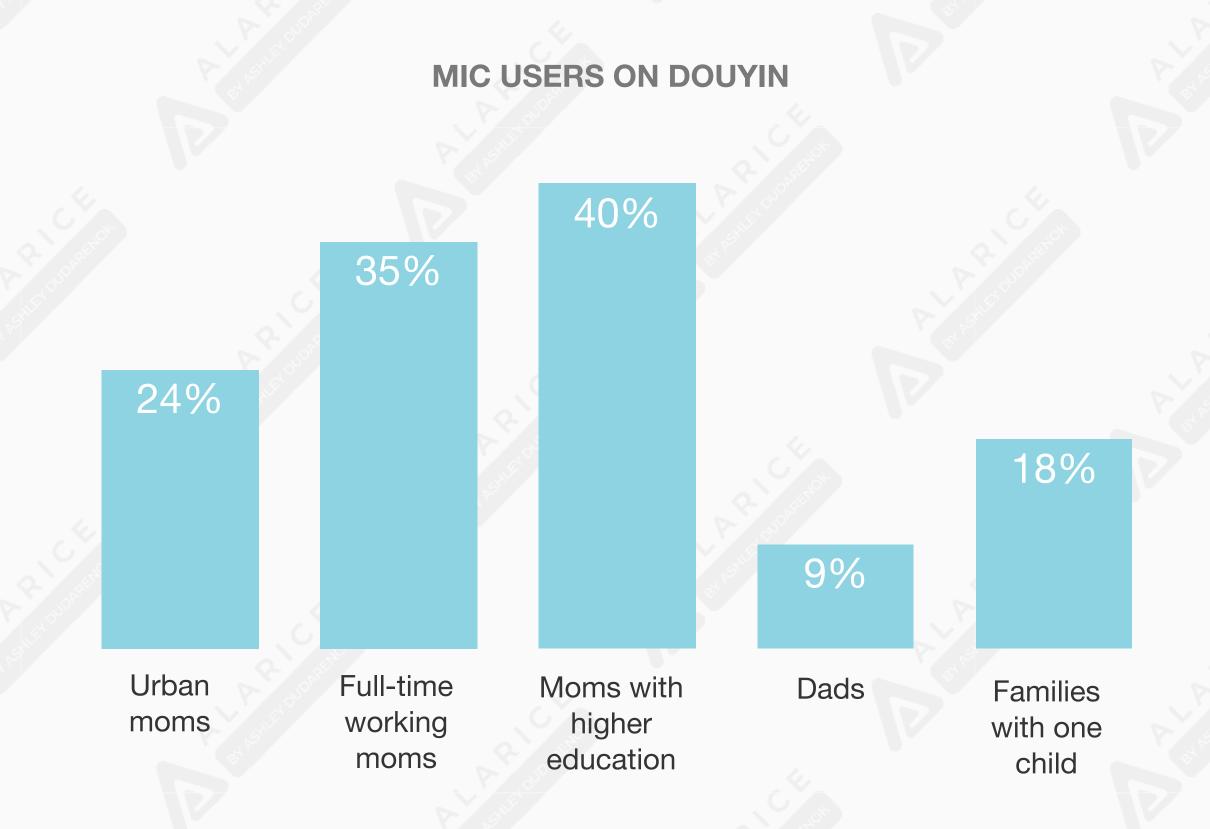


Preparing for First Pregnancy

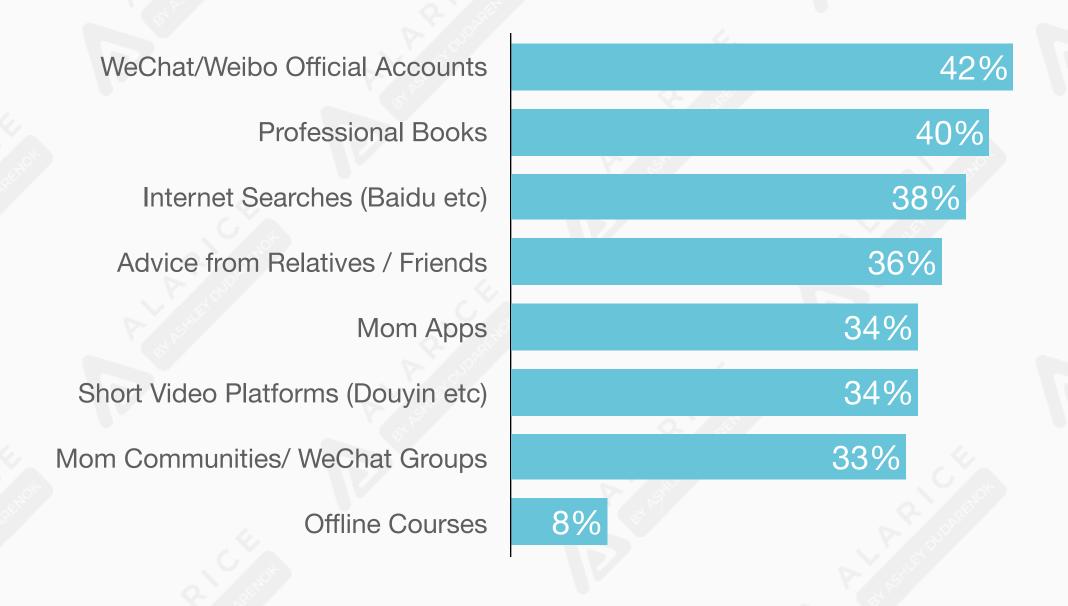




In recent years, the number of full time mothers and mothers with higher educational attainment on the platform has grown significantly.



HOW DOUYIN MIC USERS USUALLY RECEIVE INFORMATION







EXPERT BITES



KEVIN YI

China Market Research at Alarice and ChoZan

Q: WHAT ARE SOME MARKETING TIPS FOR BRANDS TARGETING SUPER MOMS AND DADS?

Due to the epidemic, parents are paying more attention than ever to brand reputation and quality when buying products. They're also paying a lot of attention to cleaning and disinfection products.

Most parents are seeing to the basic education needs of their children before they go to kindergarten so educational and developmental features should be emphasized.

Douyin is their favorite short video platform. Livestreaming and KOL recommendations are promotional formats they're used to by now.

E-COMMERCE





Maternity and infant care consumers use the following e-commerce apps and platforms most often.









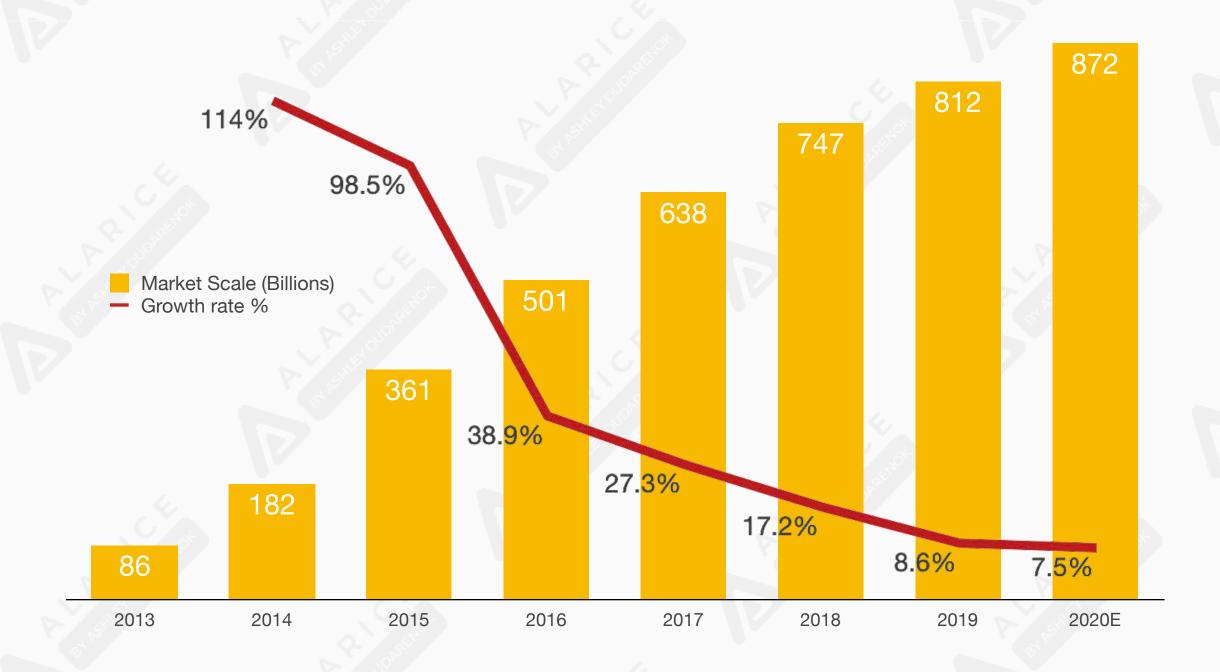






E-commerce for China's MIC market is growing fast and is expected to reach 872.37 billion RMB by 2020. iiMedia analysts believe that the shift to a two child policy, an increase in per capita disposable income, more sophisticated consumption choices and an influx of younger consumers, the maternity and infant care sector still has considerable development potential. The online e-commerce business will be the core focus for this sector.

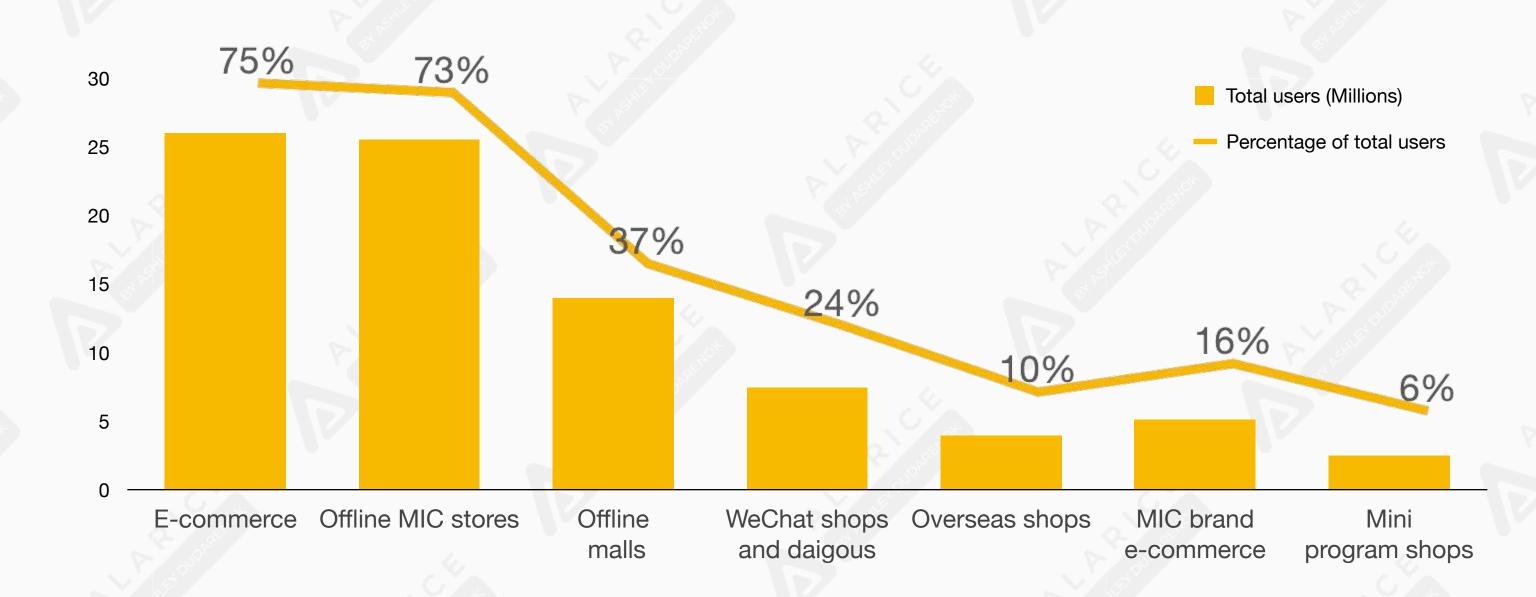
CHINA'S MIC E-COMMERCE INDUSTRY MARKET SIZE (2013-2020)





E-commerce, online and mobile purchasing channels are by far the top preferences for super moms, followed by physical stores.

DOUYIN MIC CONSUMER PURCHASING CHANNELS

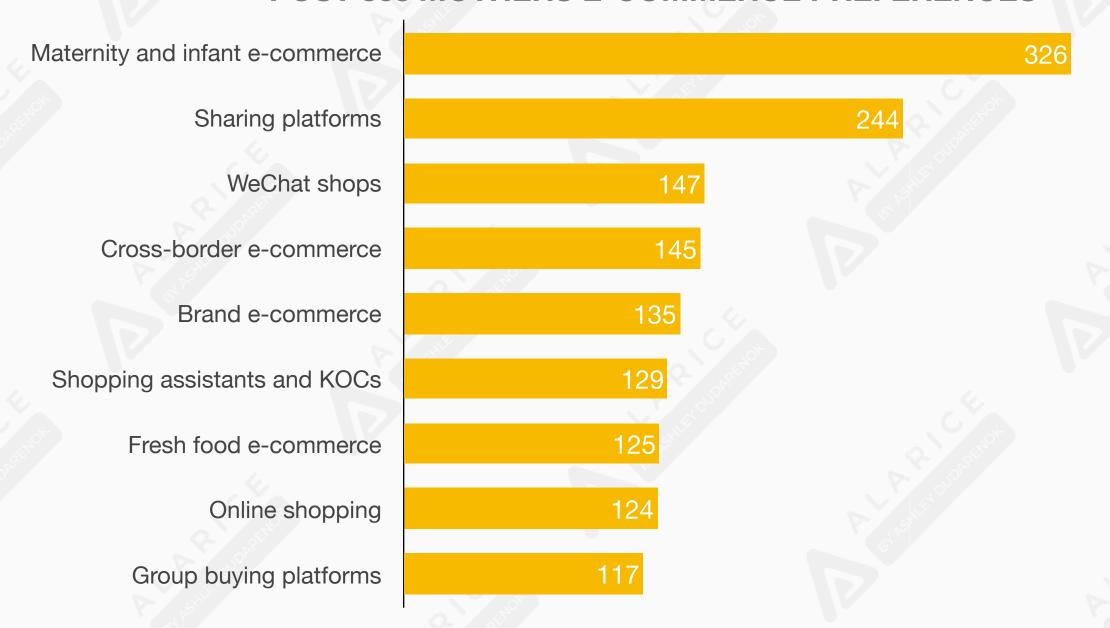




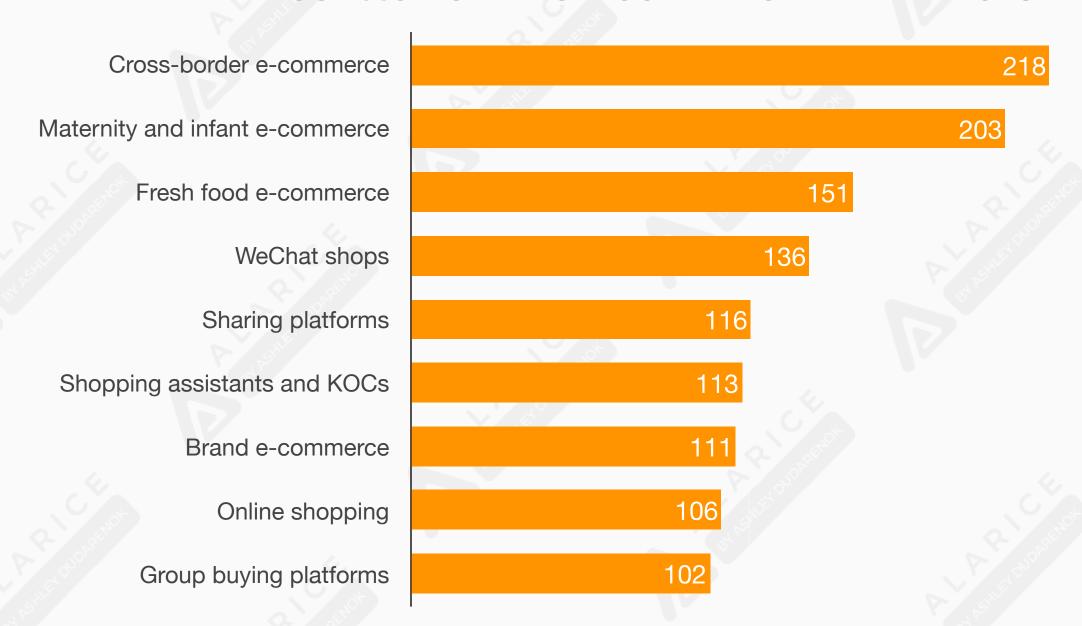


Post-95s mothers prefer international products and fresh food e-commerce as opposed to Post-85s mothers who prefer MIC e-commerce retailers and sharing platforms.

POST-85s MOTHERS E-COMMERCE PREFERENCES



POST-95s MOTHERS E-COMMERCE PREFERENCES

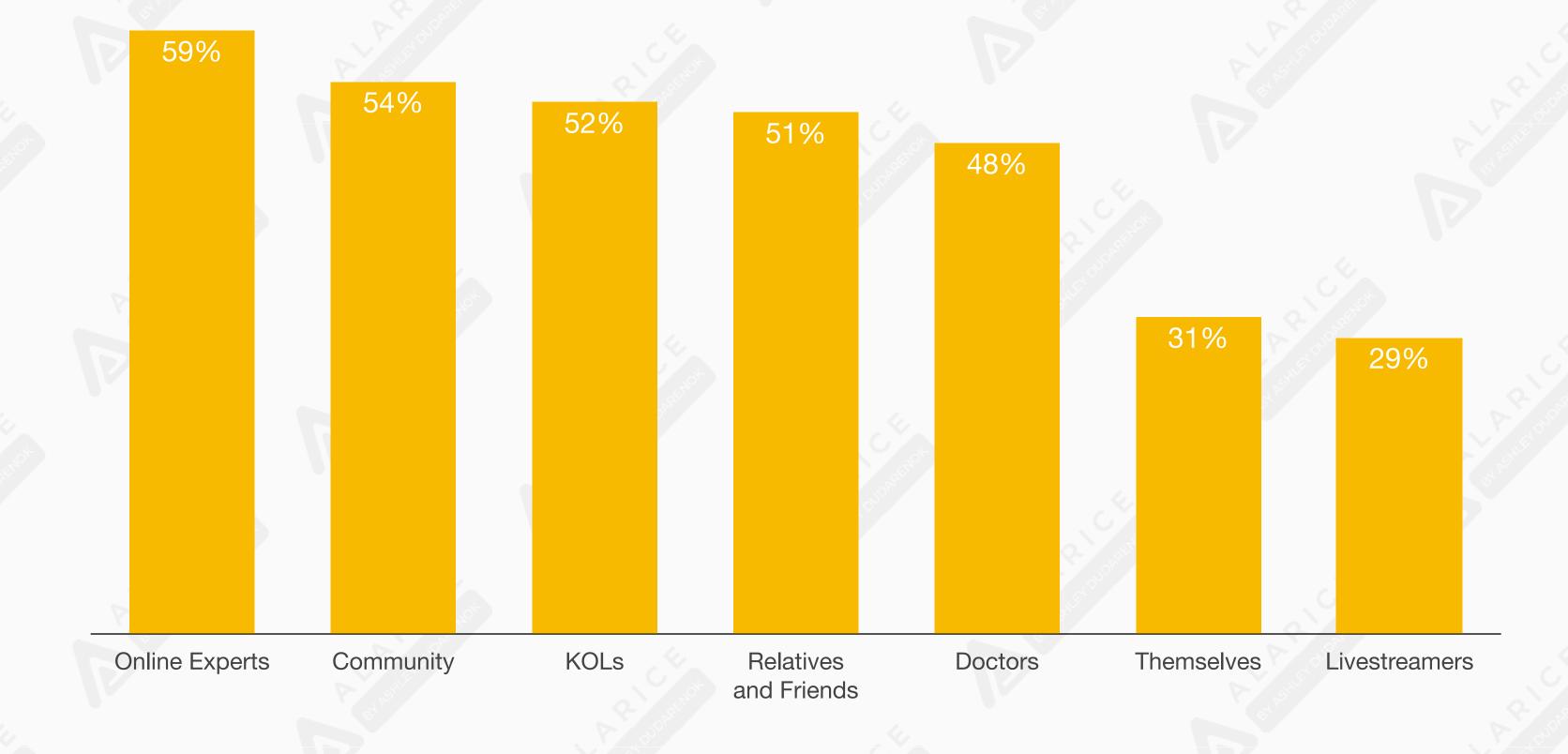






MOST TRUSTED SOURCES OF INFORMATION AND RECOMMENDATIONS

In addition to advertising, word of mouth marketing and recommendations are among the most important sources of information for making purchasing decisions. More than 50% of consumers have high expectations for products recommended by experts, KOLs and online communities.







OVERALL GROWTH IN BABY FOOD SALES

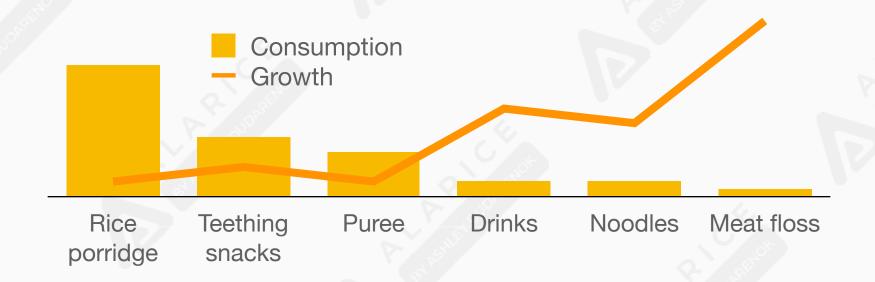
+64%

+121% +47%

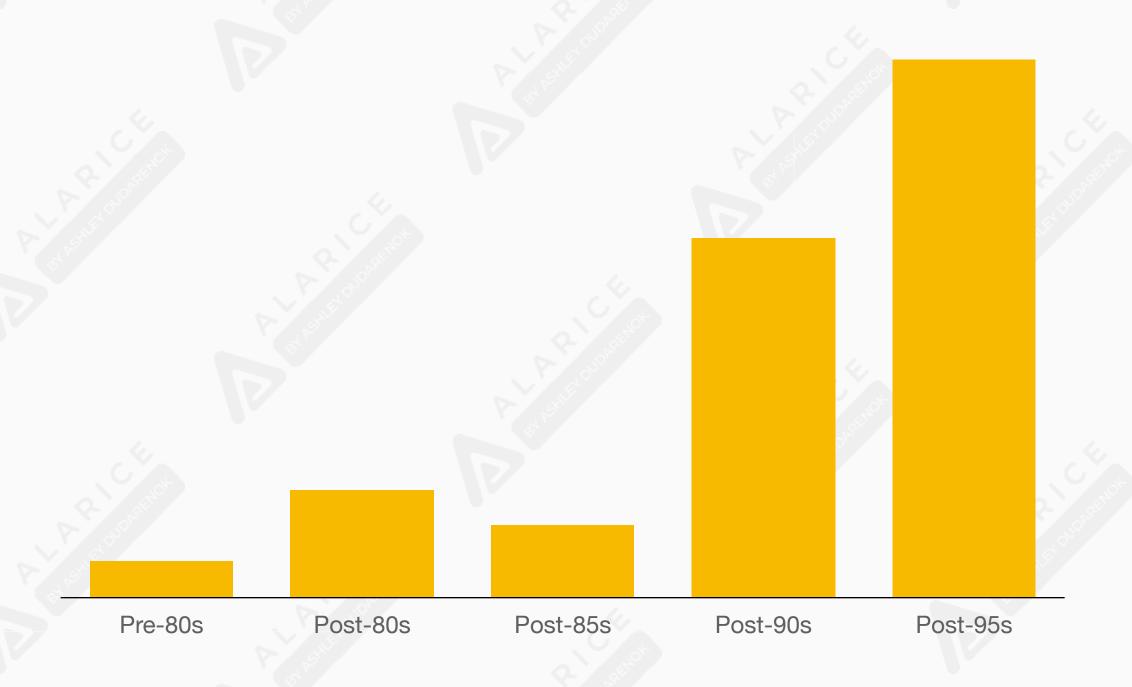
ORGANIC PRODUCTS

NON-ORGANIC PRODUCTS

TMALL GLOBAL BABY FOOD SALES AND GROWTH **MAT 2020**



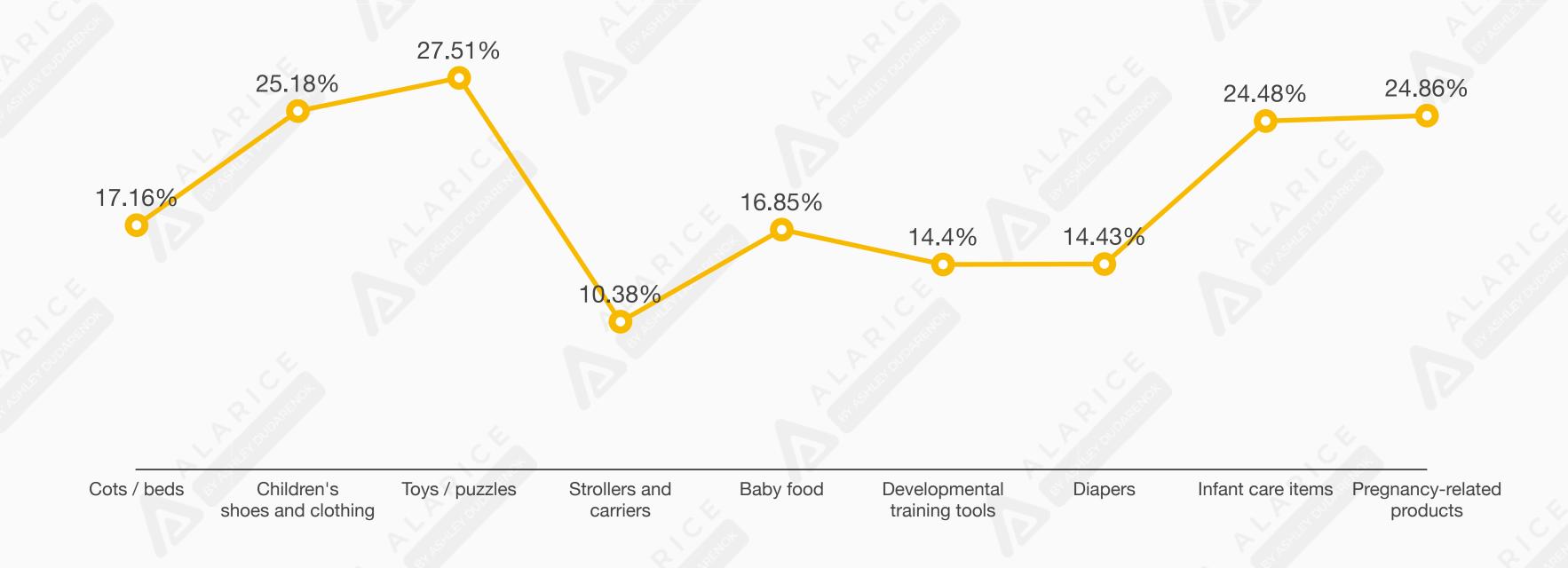
TMALL GLOBAL MIC PRODUCT ORDER GROWTH BY AGE MAT2020





SALES GROWTH FOR THE 9 MOST POPULAR MIC CATEGORIES

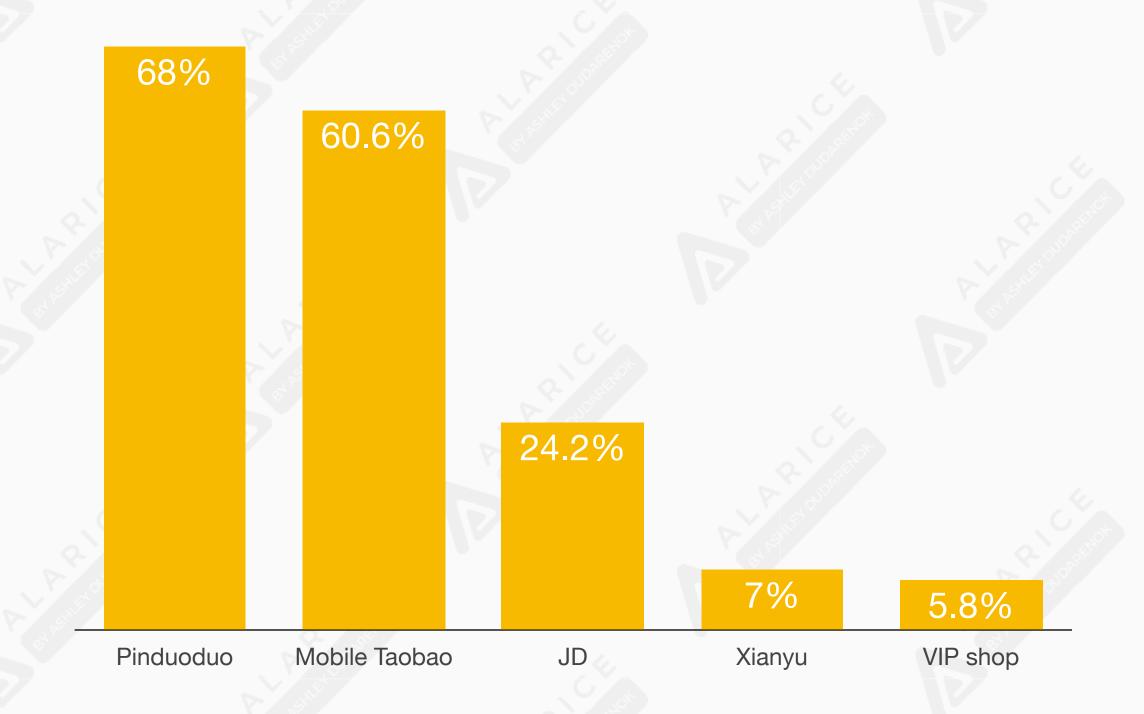
In 2019, children's shoes, clothing, toys can puzzles are the fastest growing categories of MIC products. The total volume of sales for all categories combined reached 538.8 billion RMB.





55.4% of parents of kids between 0-12 age buy MIC goods online. They find it easier to compare prices and product features this way.

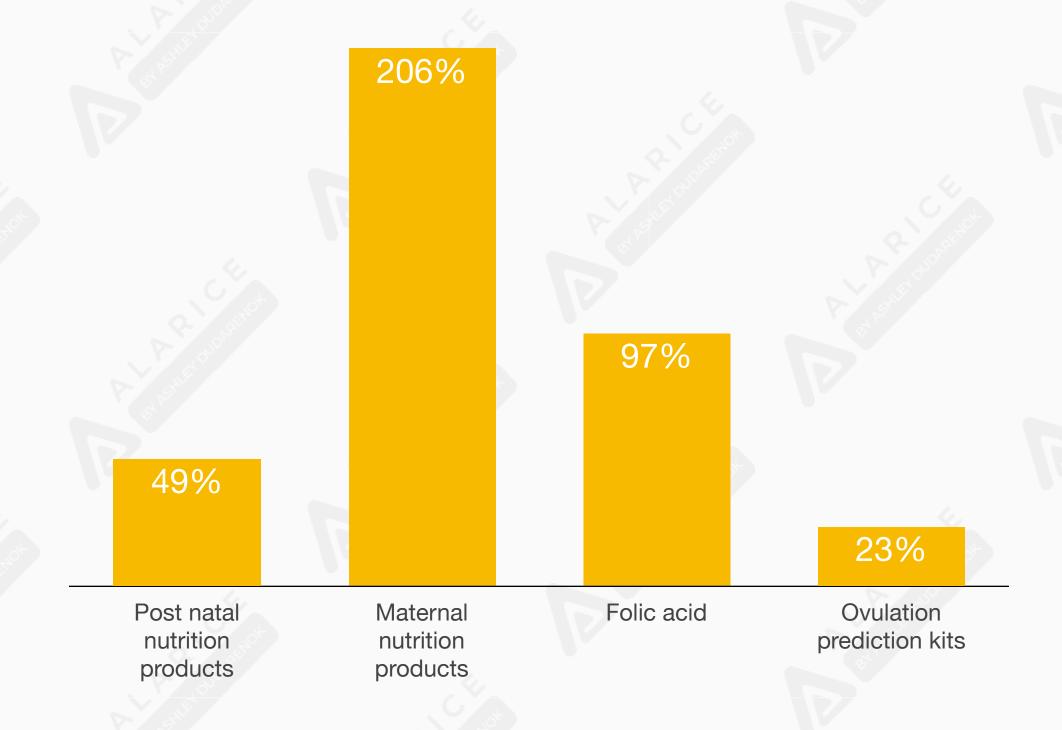
THE TOP 5 MOBILE SHOPPING APPS FOR PARENTS OF CHILDREN AGED 0-12 (APRIL 2020)





For 618 in 2020, online sales of maternal health products on Tmall increased significantly. Among them, sales of maternal nutrition products increased by 206% year-on-year, and sales of folic acid increased by 97%. Analysts at iimedia believe that the development of cross-border e-commerce and logistics has made it easier to buy maternal health care products online. Factors such as travel restrictions and offline store closures during the epidemic have further promoted the online transition of this market. They also suggest health awareness and pregnant women's desire to consume health care products such as pregnancy supplements, foods designed for pregnant women and folic acid, will continue to grow.

YOY GROWTH IN MATERNAL HEALTH PRODUCTS ON TMALL (618 SHOPPING FESTIVAL 2020)







EXPERT BITES

Q: HOW CAN BRANDS SUCCEED ON TMALL GLOBAL IN 2020-21?

By prioritising super moms. They're a group that's willing to pay premium prices for efficient products, such as 300 RMB (44 USD) for baby shampoo. They care for themselves, as well as the rest of the family.



CHLOE GONCALVES

Senior Business Development Manager at Tmall Global - Alibaba group









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