

QUARTERLY NEWSLETTER

[2025 Q2 EDITION]

Welcome to the second edition of our newsletter — your quarterly briefing from 1UP Digital.

Created for decision-makers in the luxury and lifestyle space, this issue explores a key shift at the heart of China's digital commerce: How 618 is evolving from a short-term sales sprint into a long-term brand-building arena.

Across platforms and categories, we're seeing a decisive move from GMV-first tactics to strategies rooted in user quality, ecosystem collaboration, and sustained engagement. Brands are building perception, and platforms are enabling more structured, tech-driven paths to do so.

In this issue, we look at what Q2 performance data reveals about shifting consumer behavior, and how platforms are responding with new strategies—from full-funnel content to AI-powered service upgrades. We explore how leading luxury and lifestyle brands are using 618 not just to sell, but to launch, excite and retain. Finally, we share how 1UP's own partner brands are putting these shifts into action, translating insight into meaningful results.

From content to commerce, and from traffic to trust, this is how brands are rewriting 618 for long-term value.

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OPENING BRIEFING

E-COMMERCE LEADERS

REDEFINE GROWTH

China’s leading e-commerce platforms are demonstrating not only resilience but also renewed momentum in shaping long-term growth. In recent months, Alibaba capitalized on its pricing strategy and AI integration, JD.com recorded its fastest quarterly growth in three years, and Douyin continued to outperform the market for the third consecutive period.

Alibaba JAN-MAR 2025 HIGHLIGHTS



TOTAL
REVENUE



NET
PROFIT

TAOTIAN GROUP



CUSTOMER
MANAGEMENT
REVENUE

- 88VIP members exceeded 50 million, with double-digit YoY growth
- New buyer and order growth supported by price competitiveness and AI efficiency

INTERNATIONAL DIGITAL COMMERCE GROUP



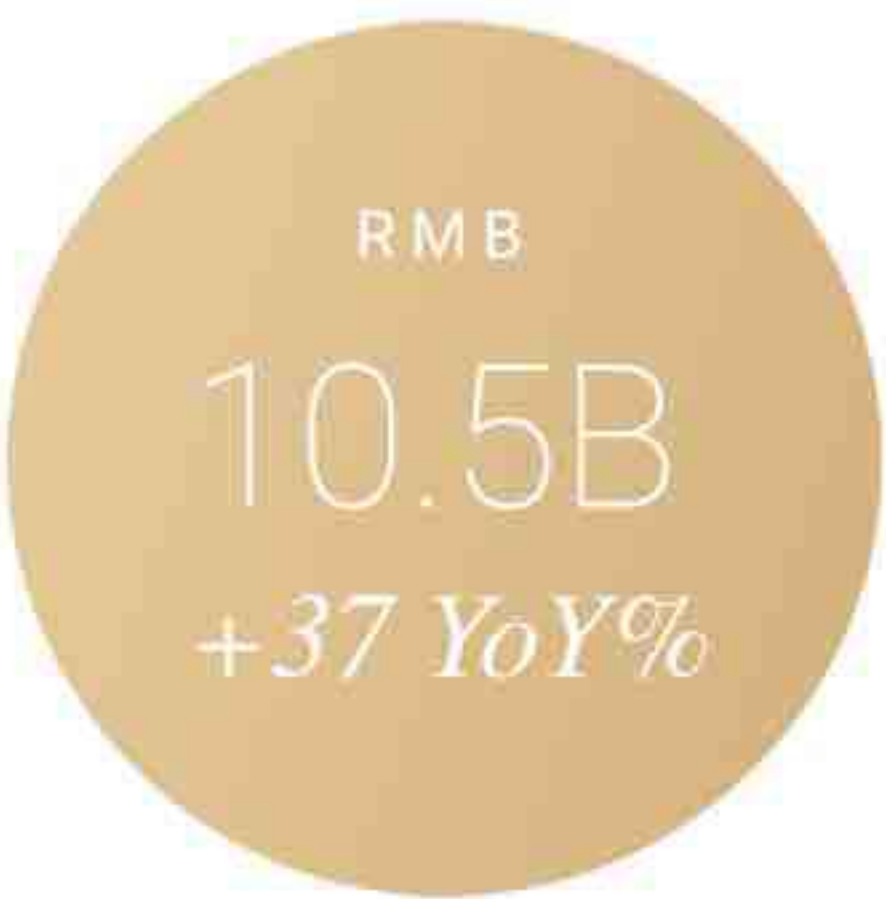
REVENUE

- Strong performance in cross-border business; improved unit economics on AliExpress Choice

JINGDONG JD.COM



TOTAL
REVENUE



OPERATING
PROFIT

- Active buyer growth returned to double digits
- 88% of orders delivered same-day or next-day



Douyin E-COMMERCE



GMV

Outpacing national averages for a third straight quarter

Category standouts included below

+57% 3C ELECTRONICS

+54% SPORTS & OUTDOORS

+46% HOME GOODS

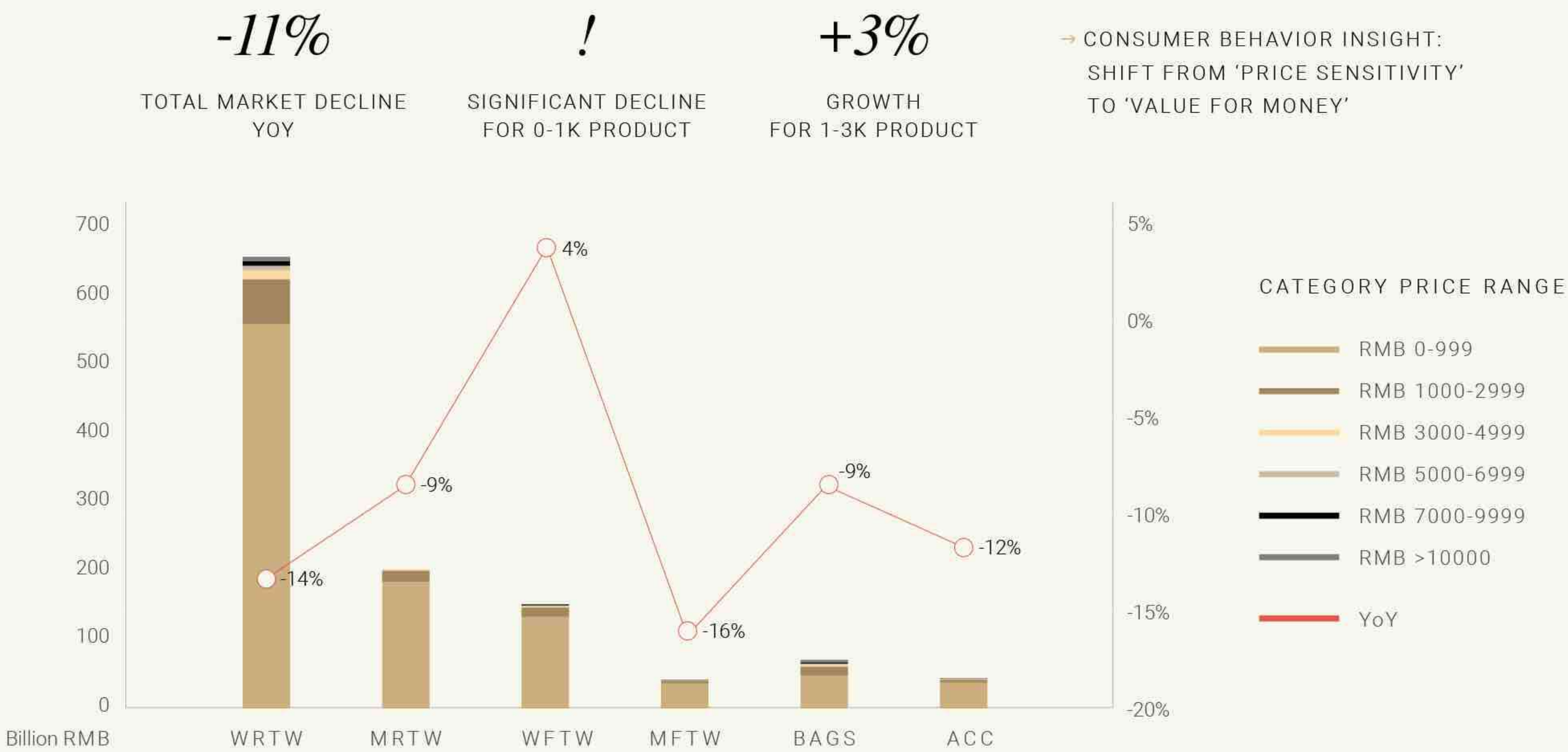
- Product card transactions rose 7–10 points, while brand-run livestreams became the top GMV engine.
- Notably, over 60% of breakout brand sales came from mid- and long-tail creators—showing Douyin’s depth beyond top-tier KOLs.



FASHION OVERVIEW: AFFORDABLE LUXURY AS THE ANCHOR, HIGH-END SPENDING SHOWS LONG-TERM RESILIENCE



TMALL MARKETPLACE - BY CATEGORY PRICE RANGE



PRICE RANGE	0-999%	1000-2999%	3000-4999%	5000-6999%	7000-9999%	>10000%
WRTW	86% -5%	10% +3%	2%	1%	1%	1%
MRTW	91% -3%	8% +3%	1%	0%	0%	0%
WFTW	88% -2%	9% +2%	1%	1%	1%	0%
MFTW	87% 0%	10% -1%	1%	1%	1%	0%
BAGS	67% -3%	19% +2%	4%	2%	2%	6%
ACC	92% -1%	5% 0%	2%	0%	0%	0%
TTL	86% (-4%)	10% (+3%)	2%	1%	1%	1%

*Data Resource: QBT; Time: 2025.4-6 vs 2024.4-6

OVERALL MARKET

Tmall's fashion category saw an overall YoY decline of 11%, yet the 1,000–2,999 RMB price band bucked the trend with 3% growth. This reflects a clear polarization in consumer behavior: both the low-end (0–999 RMB) and high-end (5,000+ RMB) segments contracted, while the mid-range (1–3K) emerged as the new growth engine. The data highlights a notable shift toward affordable luxury and designer alternatives.



MRTW (MEN'S READY-TO-WEAR)

Remains price-sensitive and dominated by basics, but early signs of mid-range recovery point to growing interest in quality essentials.



WRTW (WOMEN'S READY-TO-WEAR)

Mid-range spending shows more resilience vs. other categories, supported by continued demand for style and quality.



BAGS

A barbell-shaped market: mass appeal at the low end holds steady, while both designer affordable and true luxury segments show growth.



WFTW (WOMEN'S FOOTWEAR)

Remains price-sensitive and dominated by basics, but early signs of mid-range recovery point to growing interest in quality essentials.

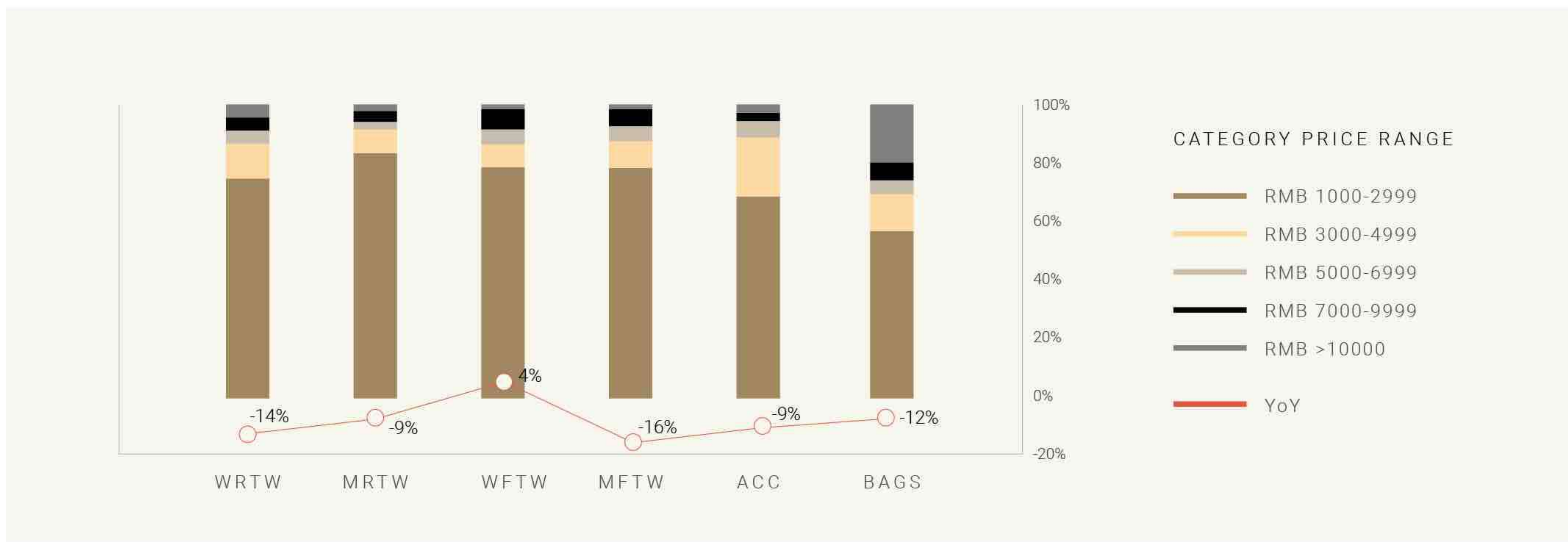


MFTW (MEN'S FOOTWEAR)

Sales remain concentrated in low-cost products, with little movement in higher price tiers. The category lacks strong style appeal and scenario-driven demand, limiting its upgrade potential.

FASHION CATEGORY HIGHLIGHTS

GMV EXCEEDS ¥850 BILLION AS PLATFORMS SHIFT TOWARD STRUCTURAL GROWTH



WOMEN'S APPAREL (WRTW): MOST CLEAR-CUT STRUCTURAL UPGRADE

- Consumers continue to show rising acceptance of "value-for-quality" products.
- Low-price (0-999 RMB) share dropped to 86% (-5% YoY), while the 1-3K segment grew +43%, now accounting for 10% of the category.
- Although still niche, the 3,000+ RMB tiers all saw positive growth, highlighting mid-to-premium resilience.



2024 & 2025 SALES COMPARISON



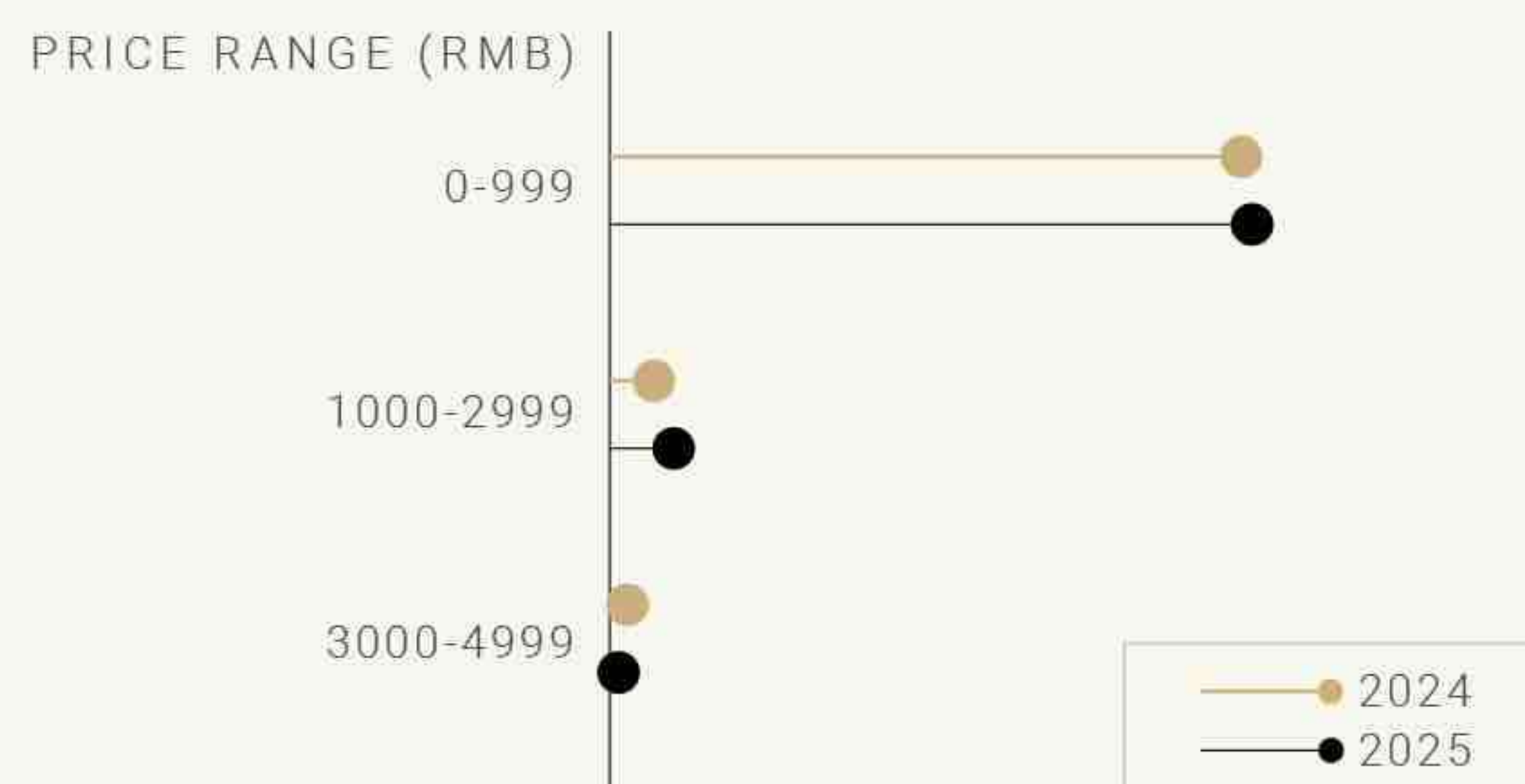
BAGS: MOST CONCENTRATED IN HIGH-END; PREMIUM STRUCTURE STABLE

- The 0–999 RMB segment declined from 70% to 67% (-4% YoY).
- The 1–3K band rose 12%, reflecting a notable structural shift.
- High-end (3,000+ RMB) now makes up over 20% of the category, with the 10,000+ segment maintaining a 6% share and growing another 8%.

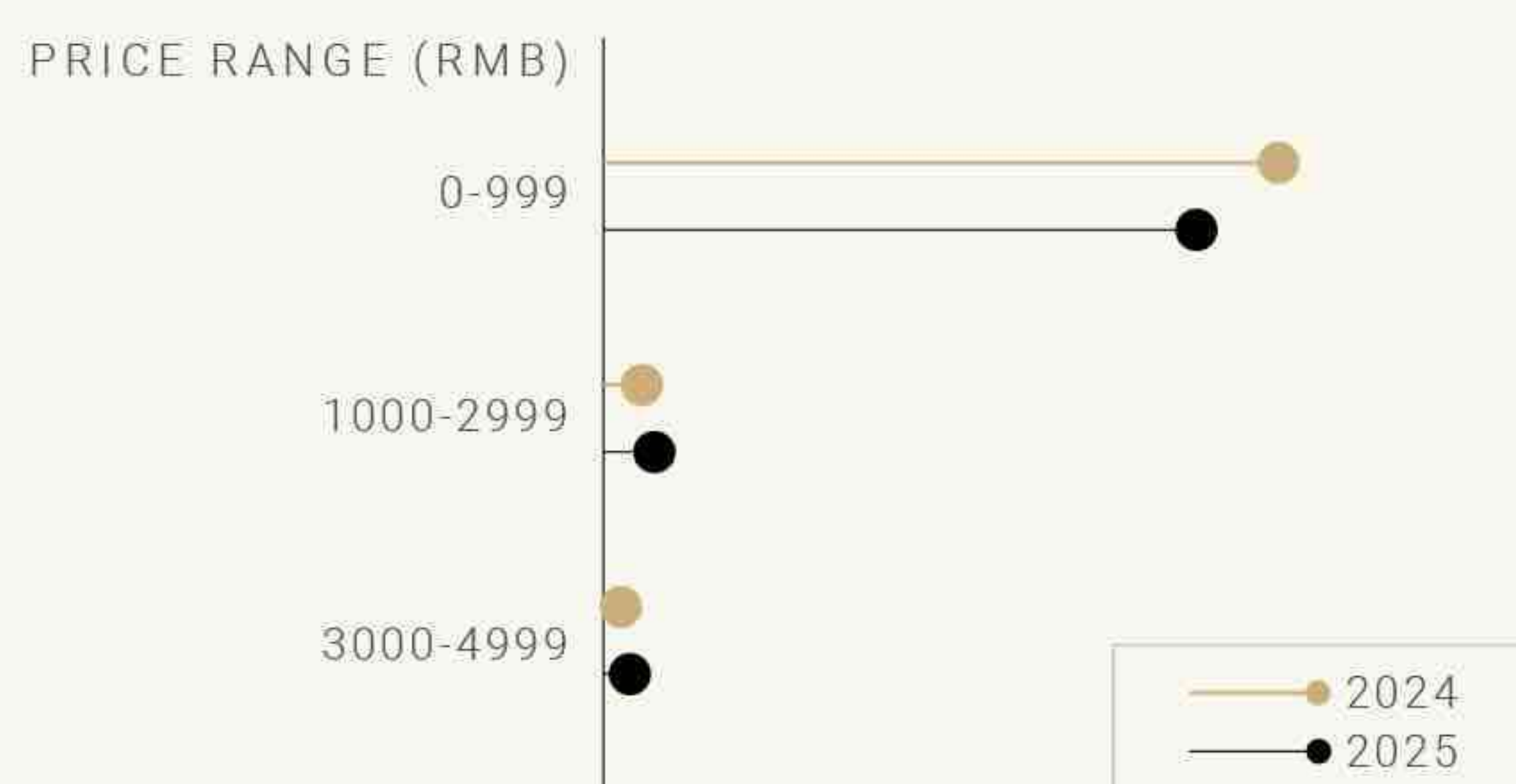
WOMEN'S FOOTWEAR (WFTW): MID-RANGE GAINING GROUND

- Low-end still dominates (88%), though slightly down.
- The 1,000–2,999 RMB segment jumped 31%, becoming the key driver of structural growth.
- The 3,000–6,999 RMB band also inched up, showing a gradual upgrade led by demand for practical yet stylish options.

2024 & 2025 SALES COMPARISON



2024 & 2025 SALES COMPARISON



MEN'S APPAREL (MRTW): MOST PRONOUNCED UPGRADE IN PRICE MIX

- While 91% of sales are still under 1,000 RMB, this band declined 4% YoY.
- The 1–3K range saw a sharp 59% increase—the biggest share gain across all categories.
- Though high-end remains small, its structure is stable with no signs of decline.

Key Insight

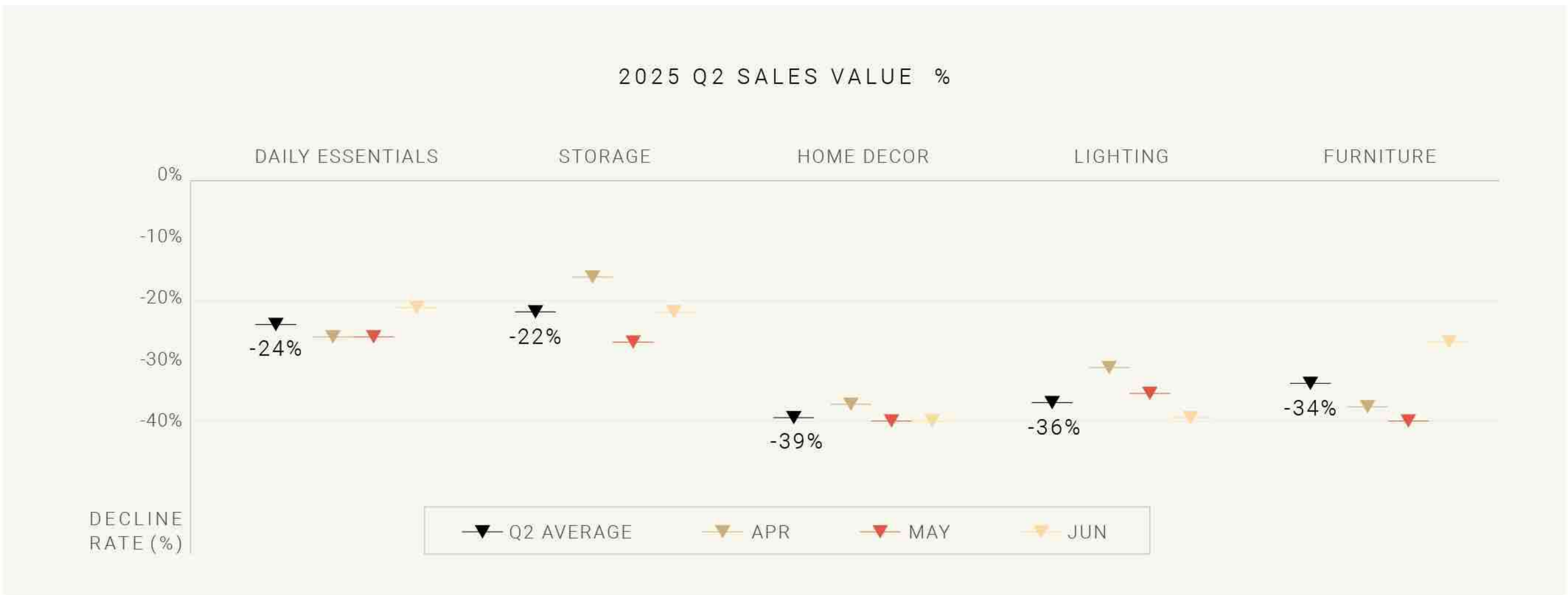
Affordable basics still lead, but mid-range growth is accelerating. The 1,000–2,999 RMB segment is driving this shift, signaling more rational spending and new opportunities for brands to grow through product and storytelling.

HOME & LIFESTYLE OVERVIEW: PREMIUM NICHE BRANDS SHOW STRUCTURAL GROWTH AMID OVERALL DOWNTURN



OVERALL PERFORMANCE:
CONTINUED DECLINE, WORSENING IN JUNE

In Q2 2025, the Home & Lifestyle category on Tmall remained in a correction phase. From April to June, all five key subcategories experienced declines in both sales volume and GMV, with the downturn intensifying in June for most.



SALES VOLUME: BROAD CONTRACTION, HOME RENOVATION CATEGORIES HIT HARDEST

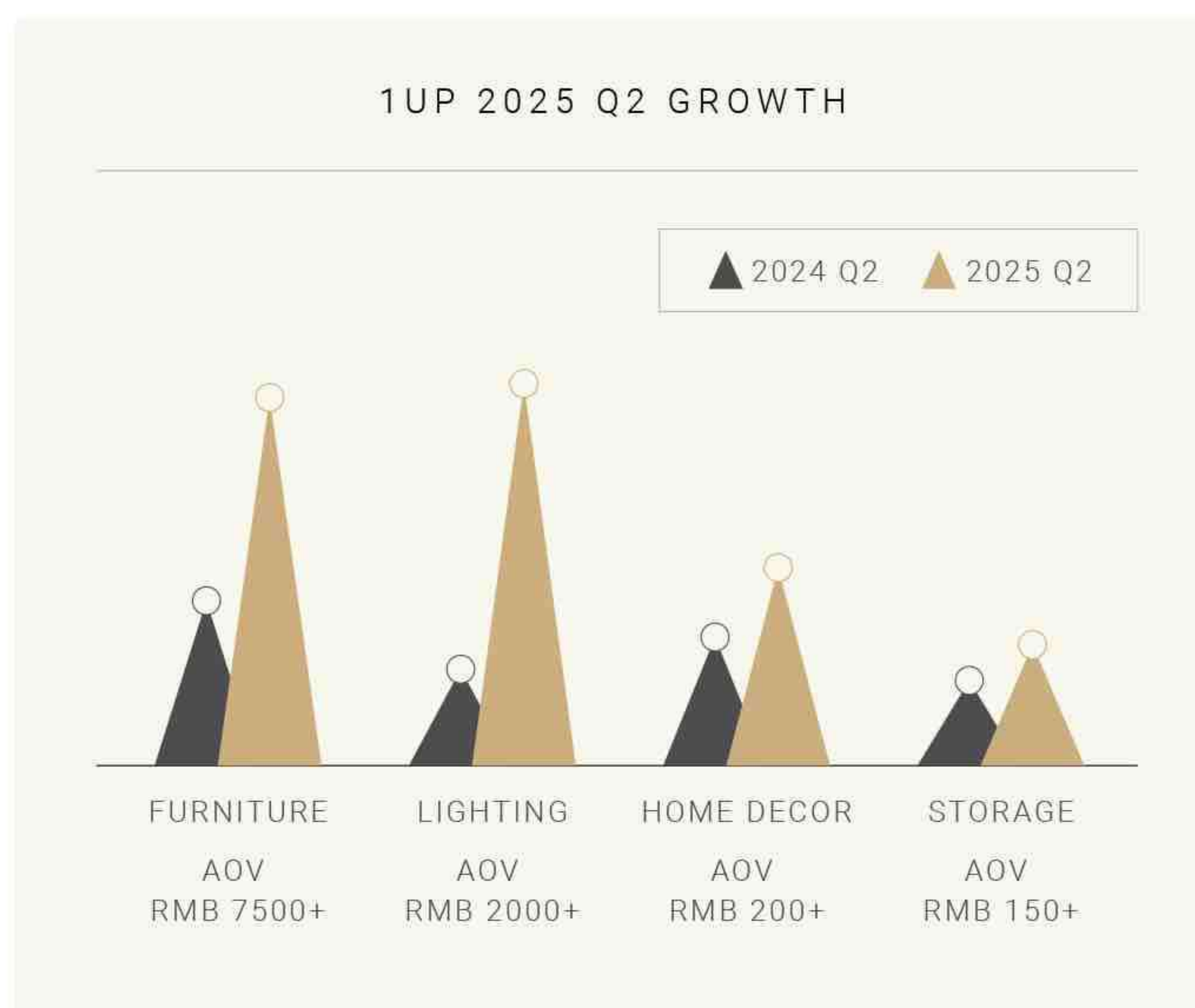
- Lightings: -42% YoY in June; continues to weaken due to delayed, long-cycle decisions.
- Storage: -40% / -34%; demand for non- essentials continues to contract.
- Furniture: -33%; signs of bottoming out, possibly buffered by 618 promotions.
- Daily Essentials: -37%; smaller fluctuations, relatively stable within the overall decline.

GMV: Milder Drop Than Volume, Supported by Higher Basket Size

- Daily Essentials / Furniture: -21% / -27%; higher basket sizes provided partial offset.
- Lighting / Decor: -39% / -40%; sentiment-driven purchases under the most pressure.
- Storage: -22%; moderate decline.

GMV declines were generally smaller than volume declines, suggesting:

- A shift toward mid-to-high price point products and bundled purchases.
- Optimized AOV from both platforms and brands helped cushion the fall.



STRUCTURAL OPPORTUNITY: PREMIUM, NICHE BRANDS ARE GROWING AGAINST THE TIDE

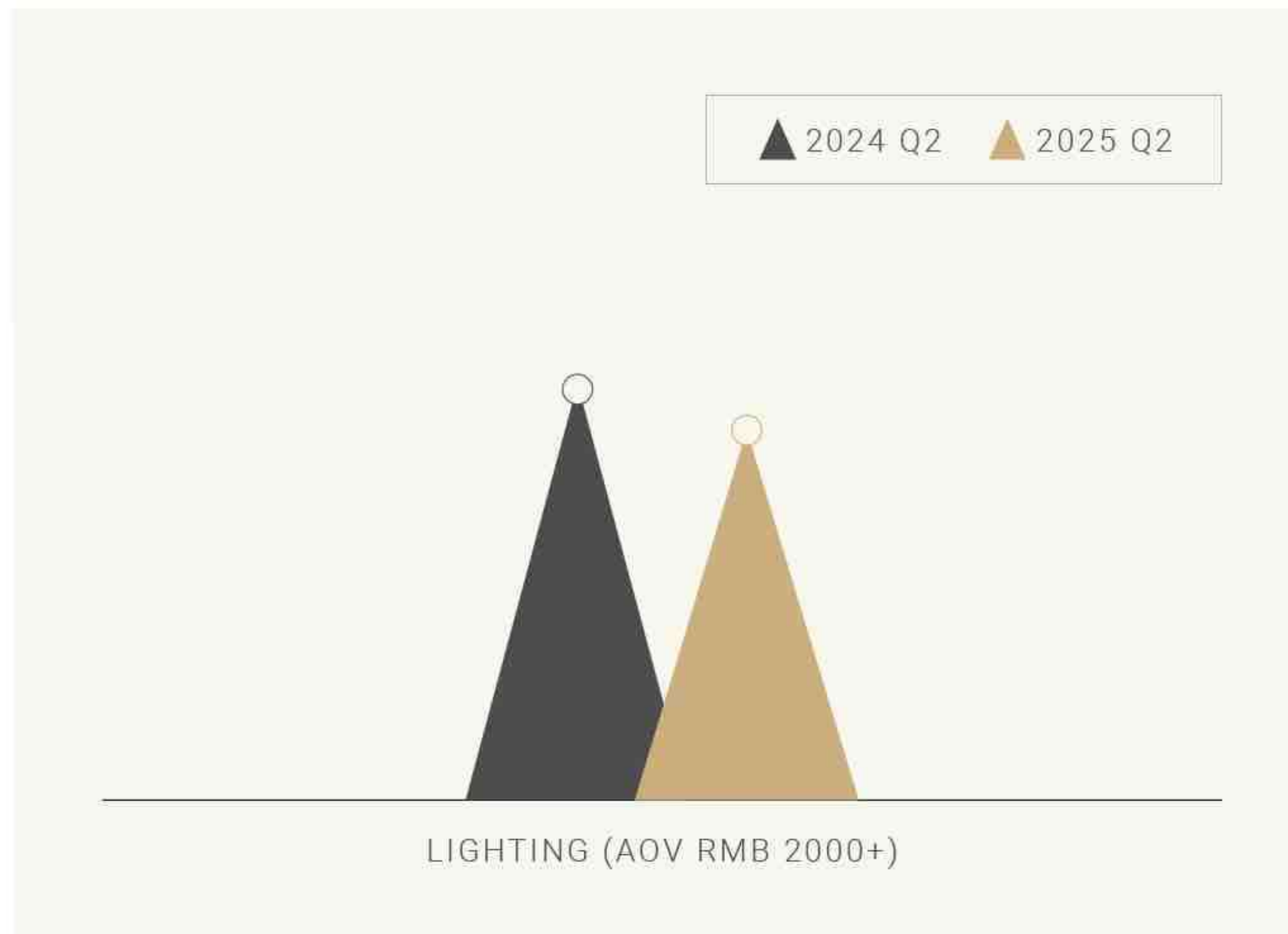
Despite the broader category downturn, several brands we work with achieved 20–30% YoY growth in four major subcategories: Furniture, Lighting, Home Decor, and Storage.

This demonstrates that premium-priced, niche-positioned brands are showing greater resilience and structural growth advantages in today's environment.

1UP HOME CATEGORY HIGHLIGHTS

SMALL BUT PREMIUM: HIGH-AOV HOME BRANDS ARE WINNING





HIGH-PERCEPTION VALUE DRIVES PURCHASE SURGE:

+291.7% **Lighting**

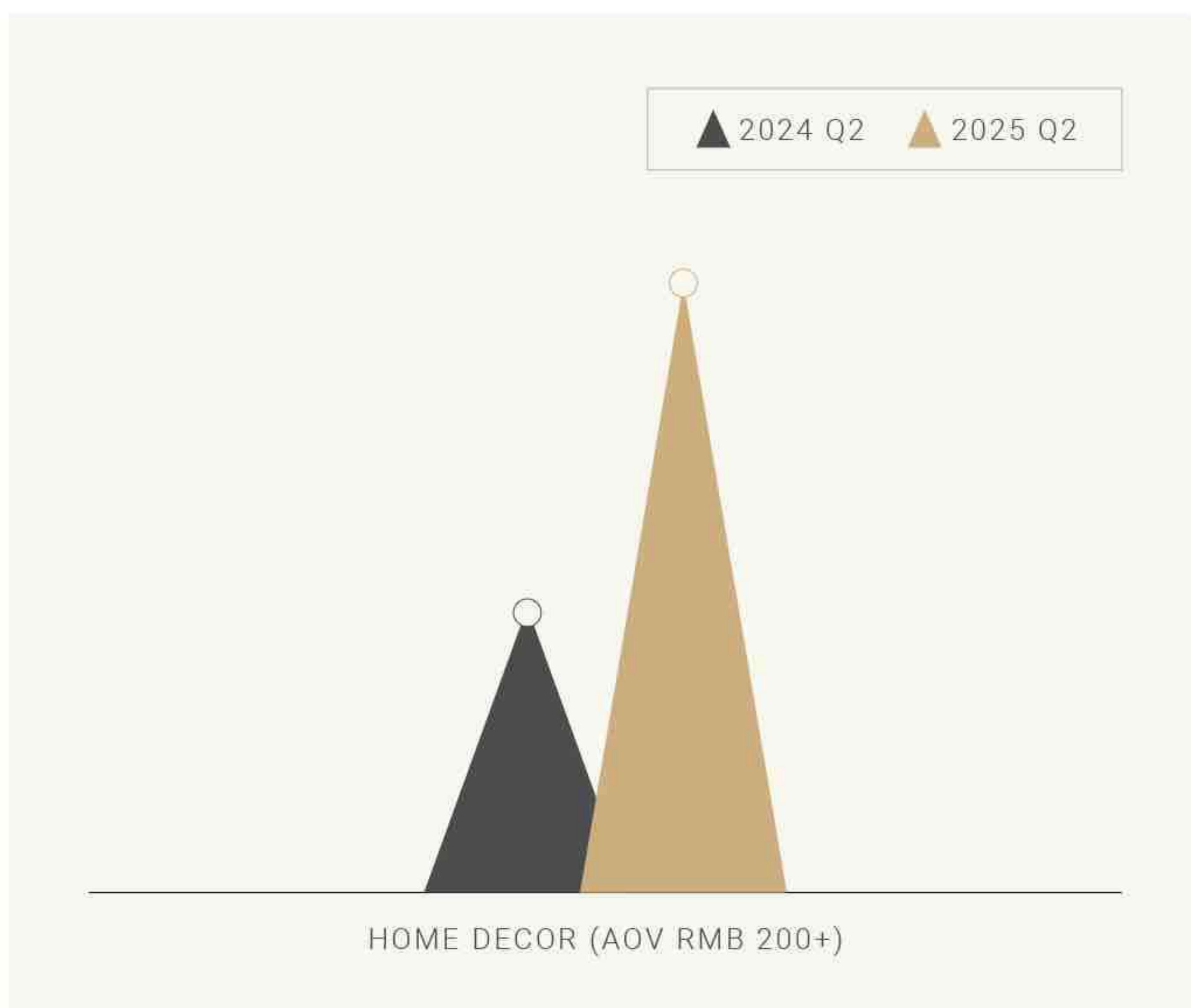
- During the 618 shopping festival, lighting emerged as a key soft furnishing category, standing out for its ability to create ambiance. The main growth drivers were portable table lamps — driven by emotional value and frequent demand windows — and chandeliers, which benefited from the rise of long-termist consumer mindsets.
- With strong visual appeal, lighting products are highly compatible with content-driven platforms like Xiaohongshu, where emotional resonance easily translates into purchase intent — completing the full user journey from off-platform inspiration to on-platform conversion.

→ The strong performance of high-AOV “niche but refined” brands demonstrates that even products with brand and design premiums can inspire substantial purchasing power amid a broader market downturn — as long as they feature a clear design language and premium quality finish.

STABLE BREAKOUT IN HIGH-COMMITMENT PURCHASES:

+138.6% **Furniture**

- The 618 “discount window” drove a doubling in GMV for furniture, suggesting that big-ticket purchases are shifting toward rational stockpiling.
- Consumers are moving away from price sensitivity and leaning into long-term usability, with longer decision cycles but more stable conversion rates.
- Data shows that high-AOV brands made strides in building trust and expertise, helping justify larger spending.



ENTRY POINT IN HIGH-FREQUENCY ESSENTIALS:

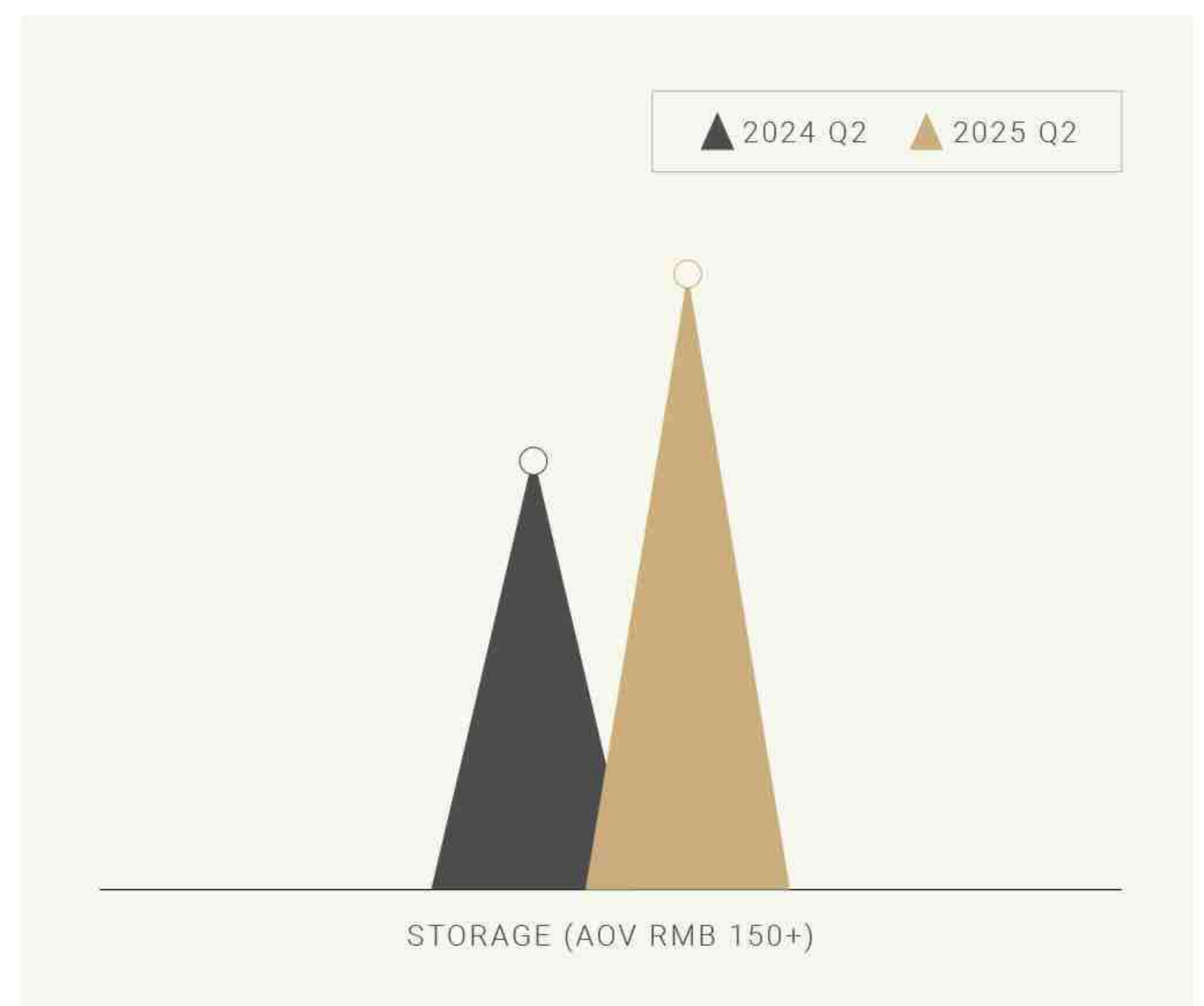
+50.5% **Home Decor**

- While not as fast-growing as lighting or furniture, home decor plays a key role in completing interior aesthetics as a low-barrier upgrade category.
- During 618, consumers often sought quick “partial makeovers” or mood-enhancing spaces. These products met the need for fast results, strong coordination, and budget control.
- Despite lower unit prices, home decor drives frequent conversions and repurchase, making it a reliable “content gateway category” for lifting AOV and UV-to-order rates.

SUSTAINED DEMAND FOR RATIONAL LIVING:

+40.5% **Storage**

- Storage maintained steady growth, reflecting a mainstream preference for “aesthetic functionality.”
- Consumers now prioritize space adaptability and visual cohesion over generic low-priced goods.
- With a clear role in the conversion journey, storage is well-suited to scenario-based recommendations and bundling strategies that enhance overall efficiency.



Key Insight

Niche home brands with high perceived value and design appeal are gaining traction, as consumers show a growing willingness to spend more on emotionally resonant and aesthetically driven products.

PLATFORM & CATEGORY HIGHLIGHTS

From Sales to Structure:
Where New Value Emerges

SALES OVERVIEW

GMV EXCEEDS ¥850 BILLION AS PLATFORMS SHIFT TOWARD STRUCTURAL GROWTH



SALES SCALE & GROWTH RATE

In a more rational consumer climate with simplified promotions, total GMV across all platforms during 618 grew by 15.2% YoY, reversing the decline seen in 2024 (StarChart). A key driver was the extended promotion cycle, spanning 37 days from May 13 to June 18, up 74% from 2023.

SUBSIDIES FUEL BIG-TICKET SPENDING

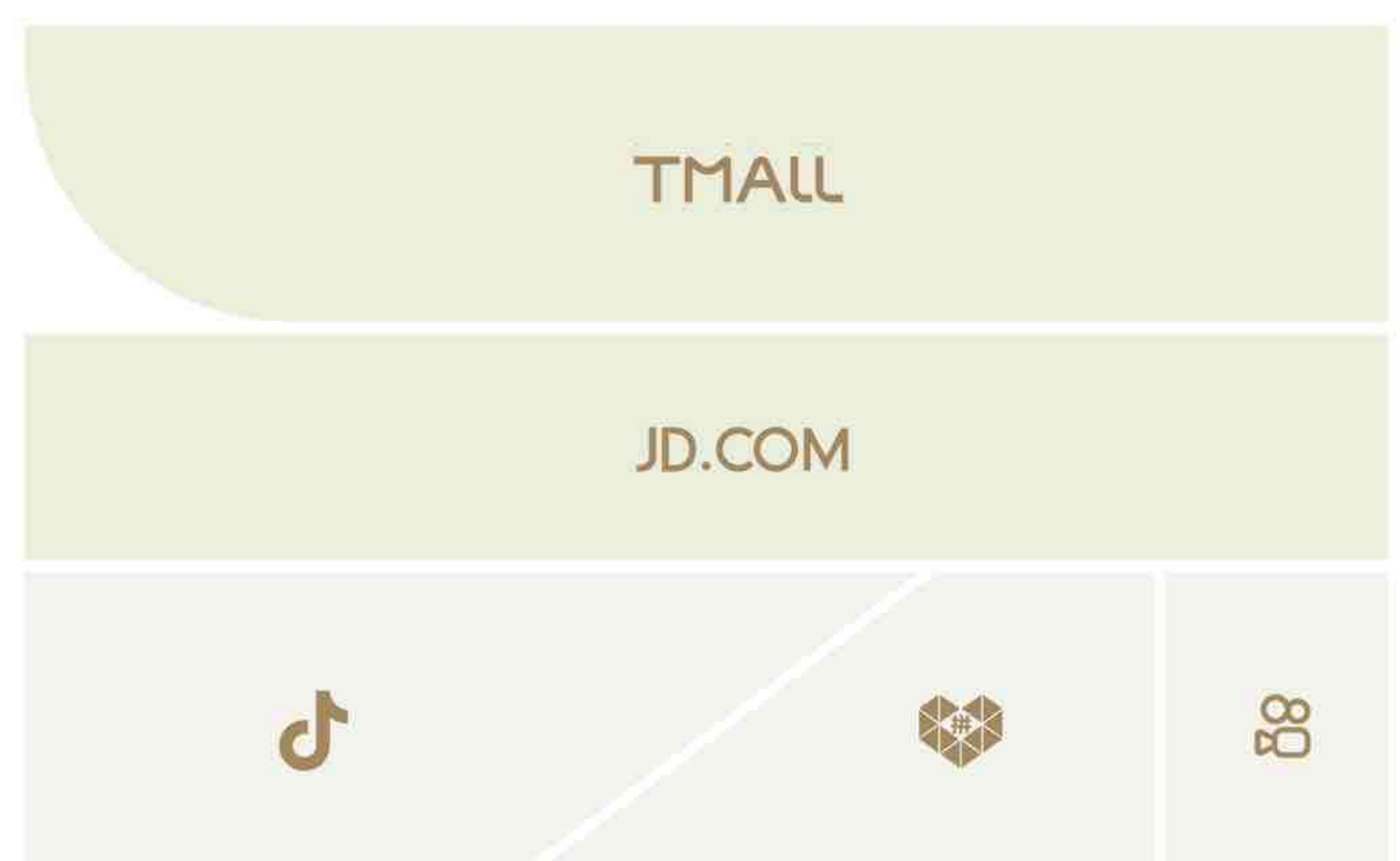
National "trade-in" subsidies across five major categories helped generate ¥1.1 trillion in sales. Combined with discounts from platforms and merchants, this "triple subsidy" model (national + platform + brand) significantly boosted demand for appliances and electronics.

¥855.6 Billion | YOY +15.2% ← Integrated EC Platforms 618 Total GMV

PLATFORM LANDSCAPE: A MORE SPLIT MARKET

- Alibaba retained the top share at 38%, but with slower growth.
- JD.com rebounded to 23%.
- Douyin jumped to 15%, entering the top tier.
- Pinduoduo fell to 8%.

(Source: Fudan Consumer Data Lab)



Key Insight

E-commerce competition is shifting from price wars to long-term structural conversion and user loyalty.

PLATFORM PERFORMANCE

DIFFERENT PATHS TO LONG-TERM VALUE

*This year, all major platforms shifted focus from price-driven growth to **user retention**, using services, content, and membership programs to build stickiness. But their strategies differ, revealing distinct roadmaps toward long-term business.*

TMALL

- Maintained the highest GMV across platforms, +10% YoY (after refunds), the best in 3 years.
- Combined “instant discounts + no-threshold coupons” to boost conversion.
- VIC Club and other loyalty tools drove repeat purchases.
- Luxury home GMV more than doubled, with high-net-worth users as the key growth segment.

JD.COM

- Number of paying users doubled YoY, with 2.2 billion total orders.
- Strengthened core in home appliances and electronics, while expanding into luxury and beauty.
- Luxury brands like TOD’S and Qeelin saw standout performance.
- Services like one-stop delivery + installation and express shipping supported high-ticket purchases.
- Dual moat: membership loyalty and supply chain efficiency.

DOUYIN

- Over 60,000 brands doubled their sales, with total GMV +18% YoY, beating the overall market.
- Livestream + shelf model drove consistent engagement.
- Fast growth in new domestic brands, beauty, and fast fashion.
- Product card sales share up 7–10%.
- Still faces challenges in long-term retention and user structure.

PINDUODUO

- Hit 3.76 million peak daily orders on its Super Bonus Day.
- Maintained edge with low-price + price-match guarantees, boosting engagement.
- Core growth in essentials like grains and household goods.
- Needs improvement in brand structure and high-spending user penetration.

Takeaway

Platform strategies are diverging. Each is doubling down on its core strengths and user base. In 2025, 618 wasn’t just about sales, it was a test of user structure, brand loyalty, and service infrastructure.

CATEGORY HIGHLIGHTS

LIFESTYLE LUXURY RISES,
TRADITIONAL LUXURY REBOUNDS

This year's 618 revealed new shifts in the luxury landscape. Emerging lifestyle categories like home décor and fragrance surged, becoming key ways for high-net-worth consumers to express personal taste. Meanwhile, traditional luxury brands reignited growth through cultural storytelling, limited-edition drops, and exclusive collaborations. Whether it's the rise of lifestyle categories or the renewal of classic luxury, the signal is clear: long-term category growth is now central to earning consumer trust.

LIFESTYLE LUXURY:
FROM FUNCTION TO
AESTHETIC EXPERIENCE

During 618, lifestyle luxury categories such as home, wellness, and outdoor saw over 100% YoY GMV growth on Tmall, well ahead of the strong double-digit gains in traditional fashion and bags. Consumer spending on "home" is shifting from pure utility to personal style and emotional experience, driving demand for aesthetic, rare, and culturally rich products.



&Tradition: Sales on Tmall surged 400% YoY.



Jo Malone: Used a livestream drama format featuring internet "CEO crush" Shen Haonan to tell a romantic 520 gift story, leading to a 600% GMV spike and +2400% traffic lift.



Vitra x RIMOWA: Their 2025 limited-edition furniture line sold out in seconds on Tmall, trending with the theme "travel DNA meets design living."

Takeaway

Lifestyle luxury is becoming a core growth engine for brands, powering acquisition, repeat purchases, and emotional connection. The shift from utility to expressions of style, sentiment, and culture is shaping a new direction for luxury growth.

TRADITIONAL LUXURY: STRUCTURAL RECOVERY IN CORE CATEGORIES

While not as fast-growing, traditional luxury showed clear **structural recovery** during 618. Growth came largely from **limited-edition launches, cross-category collaborations**, and pricing stratification, appealing to younger consumers' desire for rarity, accessibility, and self-expression. By tapping into **gifting moments** and building emotional resonance across pricing tiers, brands drove both aspirational entry and core luxury repurchase.



BAGS

- JD.com: First 4 hours of sales saw +100% YoY growth.
- TOD'S / Hogan: GMV up 200% in 28 hours; classic styles found new traction among younger shoppers (e.g. Stella and RO shoes)
- Maison Margiela × Salomon: Collab shoes sold out on Tmall.
- Moschino: Dual-track strategy—Mainline's "Tie Me" targeted core luxury consumers, while a secondary line of ¥1K–3K bags in playful, brand-aligned shapes and colors helped the brand expand into the affordable luxury segment.

SHOES

- Stella McCartney: Classic styles gained momentum among Gen Z audiences, supported by sustainability narratives and sleek, recognizable design. The iconic Elyse saw a 31% YoY increase during 618.
- Rick Owens: Iconic footwear has found a new cult following among youth culture, for its rebellion, individuality, and an unapologetic edge. The classic styles generating ¥638,935 GMV during 618, up 80% YoY on Tmall.



APPAREL

- Ralph Lauren: Polo shirt sales grew 21x YoY, boosted by "old money" styling trends.
- Diane von Furstenberg (DVF): Used TV drama The Tale of Rose for content-driven conversion, topping Tmall's luxury dress rankings.

Takeaway

Lifestyle luxury is becoming a core growth engine for brands, powering acquisition, repeat purchases, and emotional connection. The shift from utility to expressions of style, sentiment, and culture is shaping a new direction for luxury growth.

PLATFORM STRATEGY

Beyond Promotions:
Building for Long-Term Growth



E-commerce platforms are no longer just sales engines, they've become operating systems for long-term brand-user relationships.

As consumers grow more rational and competition intensifies, platforms are moving from flash promotions and traffic grabs toward long-term, system-level strategies. This section breaks down how the top four platforms—Tmall, JD.com, Douyin, and Pinduoduo—are evolving their core mechanisms around content, service, audience operations, and AI to support sustainable brand growth.

TREND 1

FROM BUZZ TO CONVERSION:
CONTENT AS A FULL-FUNNEL ENGINE

In the past, most brands focused content efforts on early-stage “seeding” (aka zhongcao), aiming for visibility. But many campaigns stopped there, neglecting conversion mechanisms on the back end. The result: wasted traffic, shaky ROI, and fragmented funnels. During peak campaigns like 618, this inefficiency becomes even more costly.

In 2025, however, platforms are shifting from one-off seeding to closed-loop conversions by integrating technical pathways and cross-platform mechanisms. Content is no longer just for awareness, it’s now a core driver of sales and retention.

TMALL × XIAOHONGSHU
“HONG MAO PLAN”

Over 60 luxury brands joined this initiative, which allows Xiaohongshu content posts to link directly to Tmall product pages. Brands also enjoy up to 10% cashback on related ad spend. Click-throughs to Tmall increased 500% YoY, validating the “content-to-checkout” conversion loop.

Shiseido used the “Hong Mao Plan” to target high-value users with tailored content. By fully connecting seeding and sales, its ROI during 618 reached 5x, over 50% higher than on other channels.

JD.COM × XIAOHONGSHU
“HONG JING PLAN”

By enabling embedded product links and post-click data syncing, this initiative bridges front-end exposure and back-end conversion —helping brands target high-intent users and improve campaign ROI.

Early trials showed a +45% increase in product view- to-purchase rate and a +28% lift in add-to-cart rate, validating the efficiency and potential of content- linked commerce.





DOUYIN: SHORT VIDEO + SHELF INTEGRATION

Douyin's closed-loop model lets users move from inspiration to checkout within one minute, shortening the path from interest to transaction.

Fenty Beauty, backed by Rihanna's livestream debut on Douyin, created a viral moment with 100M+ views, drawing massive attention to the brand and boosting Douyin's beauty category sales by +107% during 618.

Takeaway

Content is evolving from a volume lever to an efficiency engine. With platforms building seamless pathways from exposure to checkout, brands now have the tools to close the deal at the very first moment of user interest.

TREND 2

SERVICE AS STRATEGY: FROM DELIVERY TO IDENTITY-BASED EXPERIENCE

In the past, platform “service” focused mainly on logistics—delivery speed, subsidies, and fulfillment. During major sales events, it was treated as a baseline expectation rather than a key decision factor. But for high-value categories, speed alone no longer meets rising expectations for experience and emotional connection.

This year, platforms are turning service into an emotional and experiential asset. Service now begins in the content stage, helping brands establish trust and loyalty early in the journey. From efficiency to perception, service is evolving into a core growth lever.

TMALL LUXURY VIC
LUXURY CLUB

Tmall offered VIC members exclusive events, gifts, and up to 10% cashback during 618—driving 2x repurchase rates and nearly 5x higher AOV vs. regular users.

JD.COM ONE-STOP
DELIVERY & INSTALLATION

JD.com's 24-hour “order-to-install” service for big-ticket items includes delay/fee guarantees and nationwide coverage, improving end-to-end fulfillment and returns.

DOUYIN / XIAOHONGSHU:
VIDEO GUIDANCE +
AI CUSTOMER SUPPORT

Tmall offered VIC members exclusive events, gifts, and up to 10% cashback during 618—driving 2x repurchase rates and nearly 5x higher AOV vs. regular users.

Douyin's Feige AI assistant offers 24/7 real-time support, helping users choose sizes, compare options, and convert faster during the discovery process.

Takeaway

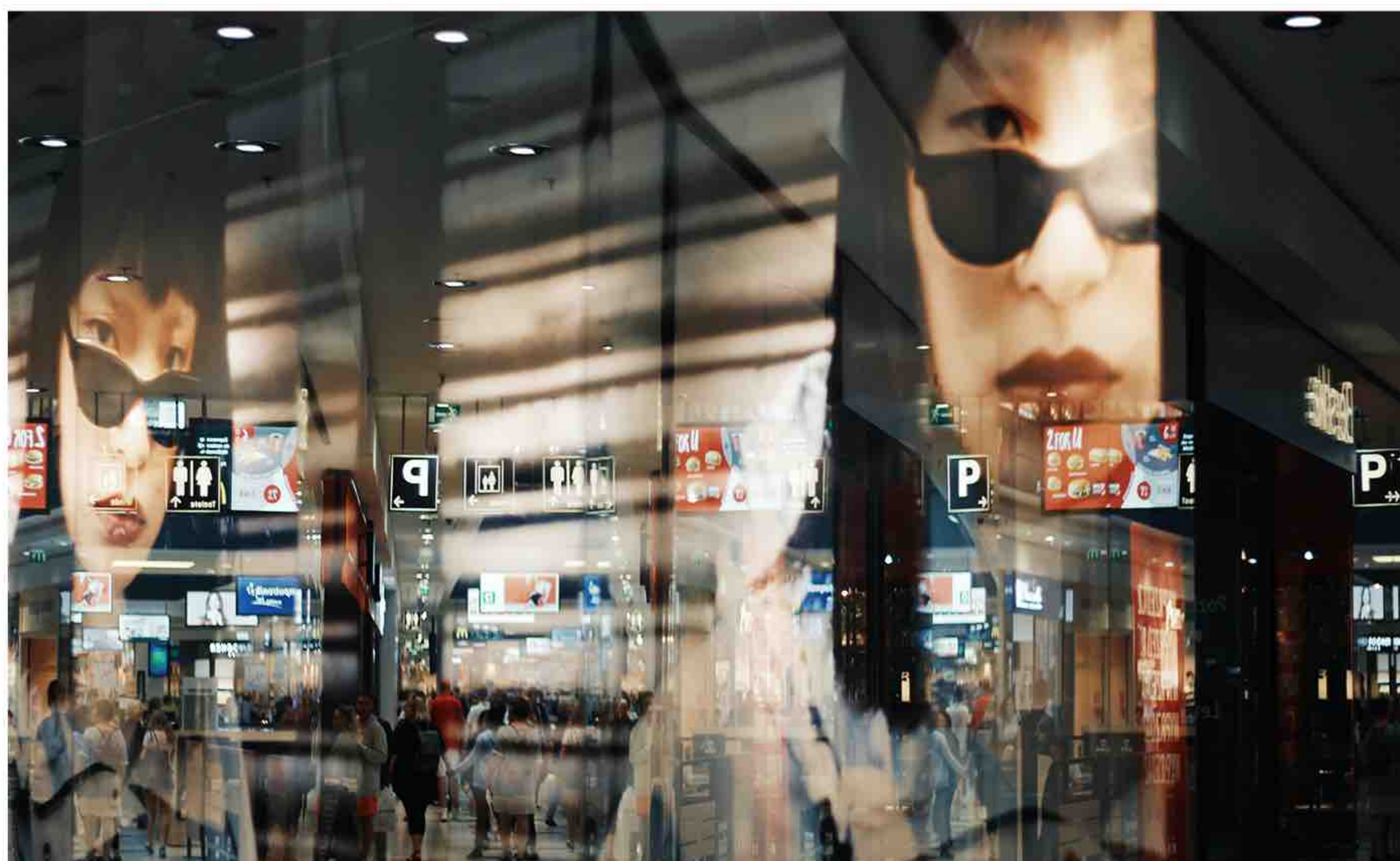
Experience is overtaking price as the key conversion trigger. By embedding service into content and identity-based membership models, platforms help brands earn long-term trust, a critical foundation for sustainable growth.

TREND 3

AUDIENCE AS ASSET: PRECISION OPERATIONS OVER MASS REACH

Traditional user operations focused on acquisition through wide, untargeted traffic. But this short-term, promotion-heavy model led to high churn and little user retention. Especially during sales events, many brands fell into a cycle of discounting, clearance, and constant re-acquisition.

Now, platforms are shifting toward audience lifecycle value—prioritizing quality over quantity. By segmenting users via memberships, communities, and first-party data feedback, platforms help brands move from one-time conversions to long-term audience asset building.

TMALL 88VIP ×
BRAND MEMBERSHIP
INTEGRATION

Tmall integrates its high-value 88VIP members with brand loyalty programs, creating a powerful audience asset pool. 88VIPs are not only high spenders but also highly engaged. With data syncing and shared benefits, brands can manage the full customer journey—from awareness to repeat purchases, within the Tmall ecosystem.

JD.COM'S MATRIX
LIVESTREAM MODEL

JD.com builds layered livestreams across brand-owned, official, and digital human accounts. Each serves a role: brand channels build awareness, official rooms offer authority, and AI hosts scale basic interactions. Together, this structure improves ROI and helps brands reach segmented audiences more effectively throughout the funnel.

DOUYIN'S VERTICAL
INFLUENCER MATRIX

Douyin helps brands build multi-tier influencer ecosystems across categories like luxury, food, and parenting. This matrix allows content diversity, efficient reach, and conversion at every stage—from seeding to livestream to private traffic. By matching creators with sub-audiences, brands can drive sustainable growth even in fragmented attention economies.

PINDUODUO'S
UPGRADED GROUPOBUY

Targeting price-sensitive, high-frequency buyers in lower-tier cities, Pinduoduo uses social group-buying and viral mechanisms to strengthen platform stickiness. This approach—combined with subsidies and gamification—turns casual users into repeat buyers and helps build a high-frequency demand pool for long-term monetization.

Takeaway

Long-term growth comes from owning the right audience, not just more traffic. Platforms are helping brands transform “users” into “assets” by building sticky, structured, and scalable user bases.

TREND 4

AI AS INFRASTRUCTURE: FROM BOOSTING EFFICIENCY TO POWERING STRATEGY

As e-commerce operations speed up, relying solely on manual teams to manage content, selection, and customer support has become unsustainable. AI was once used for isolated tasks, but in 2025, platforms are embedding AI across the entire commercial stack to power system-level upgrades in efficiency and agility.

TMALL: SMART PACKS + AI CUSTOMER SUPPORT + AUTOMATED CONTENT

Tmall deployed AI across 618 with auto-generated visuals, videos, and smart replies via chatbots. It also opened up personalized audience targeting tools like Strategy Bao and custom audience packs via Alimama, helping brands quickly tailor content to key segments and boost campaign ROI.



Used AI-powered audience insights and search-triggered creative to push seasonal gifting campaigns. Several SKUs topped category rankings, with conversion rates exceeding the industry average by 200%.

JD.COM: DIGITAL HOSTS + AI-DRIVEN FULFILLMENT

JD.com's "AI Edition" of its 10 Billion Subsidy program used predictive models to push promotions to the right users, increasing fulfillment speed and basket size. Its digital human livestream system—now free for small brands—lowered labor costs and extended coverage hours.



MCM's AI twin-host livestream achieved 3x user watch time, 10x conversion rates, and drove luxury bag GMV to category-best growth.

DOUYIN: AI-POWERED CON- TENT AND AD DELIVERY

Douyin's Full Funnel Promotion 2.0 used AI to script, edit, and vet videos at scale—cutting production time by 80%. Its "Smart Delivery Star" and "Industry Assistant" tools helped automate planning, budget optimization, and reporting, cutting manual ad ops effort significantly.



Smart Star identifies campaign issues end-to-end and offers clear, actionable fixes to boost efficiency and performance.

Takeaway

AI is no longer just a “tool”—it’s the engine behind brands’ autonomous operating systems. From cost savings to smarter targeting, AI now plays a central role in enabling long-term, self-reinforcing brand growth.

BRAND PLAYBOOK

From Buzz to Equity:
How Luxury Brands Build Assets



618 is no longer just a sales sprint, it's become a test ground for building long-term value.

In a market where consumer attention is fragmented, content is saturated, and short-term ROI is harder to achieve, the conversion logic is shifting: from chasing immediate transactions to managing long-term relationships; from chasing promotions to building content and membership assets. It's not just about selling, it's about earning trust, creating emotional connection, and building sustainable engines for growth.

This section looks at four strategic pillars and real-world brand cases to show how leading players are using 618 as a launchpad for long-term gains. It's a practical answer to the question: short-term volume, or lasting value?

BUILDING BRAND MINDSHARE: CONTENT AS THE ENTRY TO LONG-TERM RECOGNITION

“Seeding” used to mean soft, top-of-funnel content. But for luxury brands, it’s now the start of a long-term branding path.

DVF partnered with hit drama *The Tale of Rose*, embedding its dress into the storyline and linking Xiaohongshu notes directly to its Tmall page. It hit No.1 in Tmall’s luxury dress category, with its embroidered tea dress becoming a million-level bestseller and driving a spike in new customer acquisition.



Loewe celebrated the Puzzle bag’s 10th anniversary with visual storytelling rooted in collaborations with Studio Ghibli and Ibiza culture, driving UGC creation that reinforced its cultural value and boosted product engagement.

Takeaway

Content builds equity when it’s tied to symbolism and cultural resonance, brands win long-term mindshare by owning a lifestyle or point of view.

EXPERIENCE AS STORYTELLING: SELLING THE EMOTION, NOT JUST THE PRODUCT

As users shift from price-driven to emotion-driven behavior, livestreams and content hubs become stages for immersive brand expression—not just transactions. More luxury brands this 618 used scenes, pacing, and interaction to turn content into emotional connection.



Jimmy Choo designed a “Life Milestones” livestream, with KOLs roleplaying through scenarios like the office, wedding, and night out—each paired with curated shoes. The drama-meets-product storytelling pushed up watch time and net sales by 50%, while reinforcing the idea that Jimmy Choo is for life’s important moments.



ICICLE turned its stream into a cultural session, partnering with a museum for a “Rooftop Farm” show that covered traditional dyeing and Eastern sustainability philosophy. The slow-paced, meditative stream had 3x the average view time, deepening brand trust among high-value users.

Takeaway

It’s not about what you stream, it’s how you stage it. In today’s experience economy, brands win time, attention, and loyalty by first winning emotional relevance.

EFFICIENCY AT SCALE: USING AI TO IMPROVE LONG-TERM ROI

With pressure to produce more content faster, brands can't rely solely on manual work. And with longer sales cycles and rising customer expectations, AI is now a core infrastructure—not just a tool.



Stressless used AI to generate high-quality lifestyle imagery from basic product shots—placing the same sofa across Nordic living rooms, cozy bedrooms, and more.

This approach cut content production costs by over 70% and accelerated campaign turnaround. More importantly, the AI-generated visuals significantly lifted engagement and seasonal conversion rates, turning efficiency into measurable sales impact.



Tangxindan leveraged AI to convert static model photos into dynamic try-on videos optimized for Tmall.

These motion clips showcased fit, texture, and styling in action—directly boosting platform compatibility and shopper attention. As a result, traffic efficiency improved by over 50%, and campaign ROI surged past 12x, proving AI's value in scaling content and driving performance.



Burberry ran 270 hours of continuous livestreams during 618 using AI-powered virtual hosts—no human crew required.

Paired with dynamic algorithm-driven content recommendations, the brand achieved a 500% sales lift. The always-on digital host not only cut labor costs but also ensured consistent, high-volume output aligned with Burberry's image.

Takeaway

Long-term growth comes from owning the right audience, not just more traffic. Platforms are helping brands transform “users” into “assets” by building sticky, structured, and scalable user bases.

MEMBERSHIP AS A STRATEGIC ASSET

As traffic becomes harder to buy, brands are shifting from one-time conversion to long-term retention. The membership model is evolving—from points and discounts to an ecosystem that combines emotional connection, exclusive rewards, and tailored content.

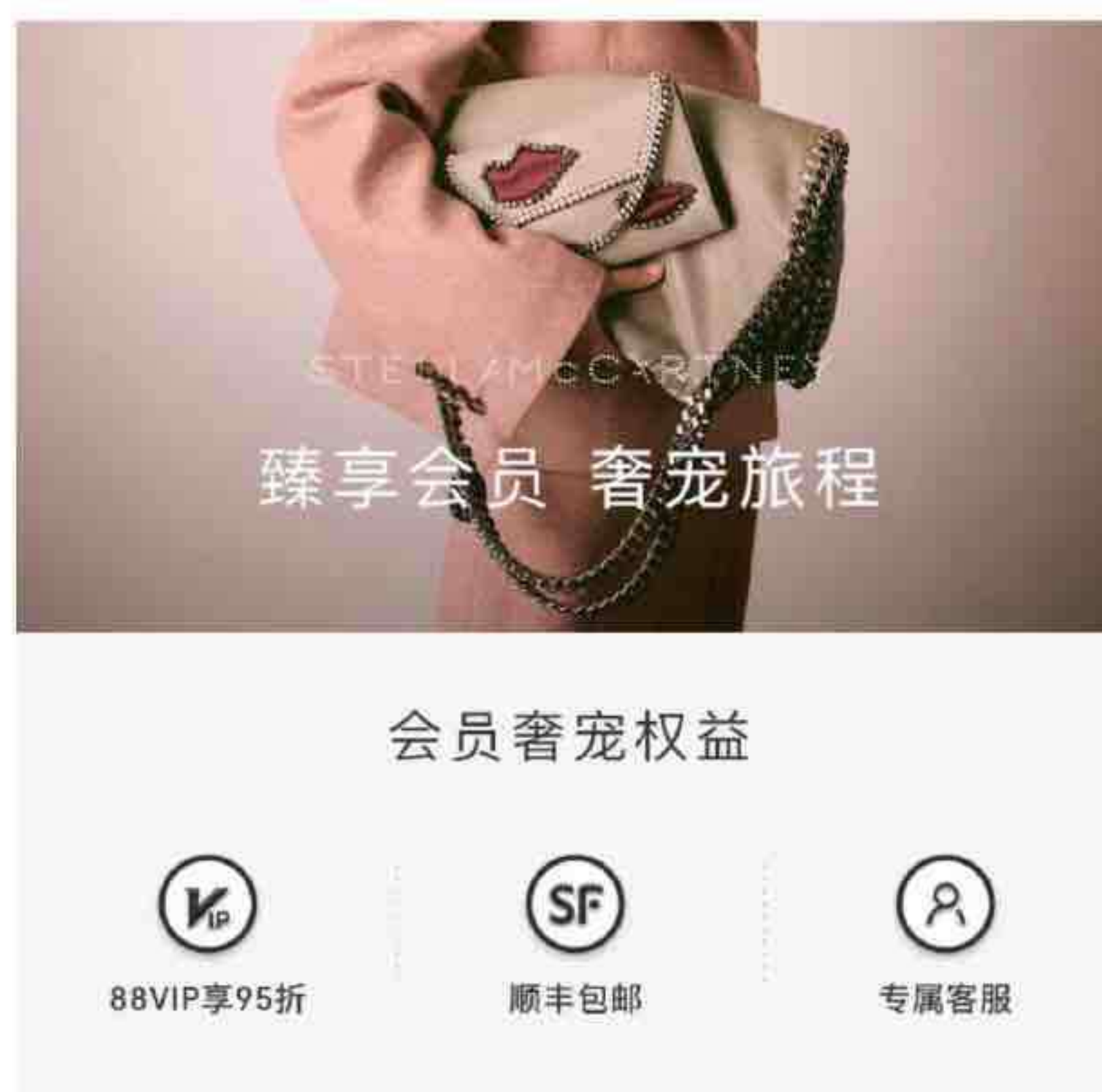
More brands are using precise segmentation and differentiated privileges to unlock repeat sales and build durable user relationships.



Ralph Lauren used structured VIC data to map tiered retention strategies. Its top members averaged 4 purchases per person, with one ordering over 30 items. During 618, the brand launched members-only access to “Old Money” classics, reinforcing cultural alignment and driving repurchase.

Stella McCartney activated its VIC program with high-touch concierge service during 618, generating 170 orders from just 75 buyers.

These members accounted for 5.3% of store GMV, with an average order value more than double the storewide average.



By delivering personalized support and elevated experiences, the brand turned elite membership into a high-efficiency conversion engine.

Takeaway

Content builds equity when it's tied to symbolism and cultural resonance, brands win long-term mindshare by owning a lifestyle or point of view.

CASE HIGHLIGHTS

How 1UP Translates Insight into Impact



As platforms evolve their tools and mechanics, the bigger question for brands is how to build sustainable growth beyond the spike of a sales event.

1UP's 618 campaign work shows that long-term thinking isn't just about planting more content, it's about turning great content into reusable assets, and building systems that connect awareness to conversion, and conversion to retention. Whether it's reactivating existing influencer content or designing full-funnel pipelines from seeding to sales, our approach helps brands turn campaigns into repeatable growth models.

MARKETING SHOWCASE

Electrolux Coffee Machine: Driving Efficient ROI via Gifting Content Reuse + CID Ads

OBJECTIVE

Reactivate high-performing influencer content from previous campaigns by leveraging CID (Click ID) ad placements during 618 to drive new conversions without additional influencer cost.



STRATEGY

- Reused top-performing content from Q1 lifestyle and coffee-focused KOLs.
- No new influencer fees incurred during 618—only CID ad spend.
- Focused CID investment on proven posts to maximize ROAS.



RESULTS

- ROI reached 1.31 during the 618 campaign period.
- Achieved efficient sales conversion with minimal media budget by reactivating legacy content.

KEY TAKEAWAY

By pairing proven influencer content with precision CID ads, Electrolux successfully extracted secondary value from existing creative, turning past seeding into cost-effective conversion.

MARKETING SHOWCASE

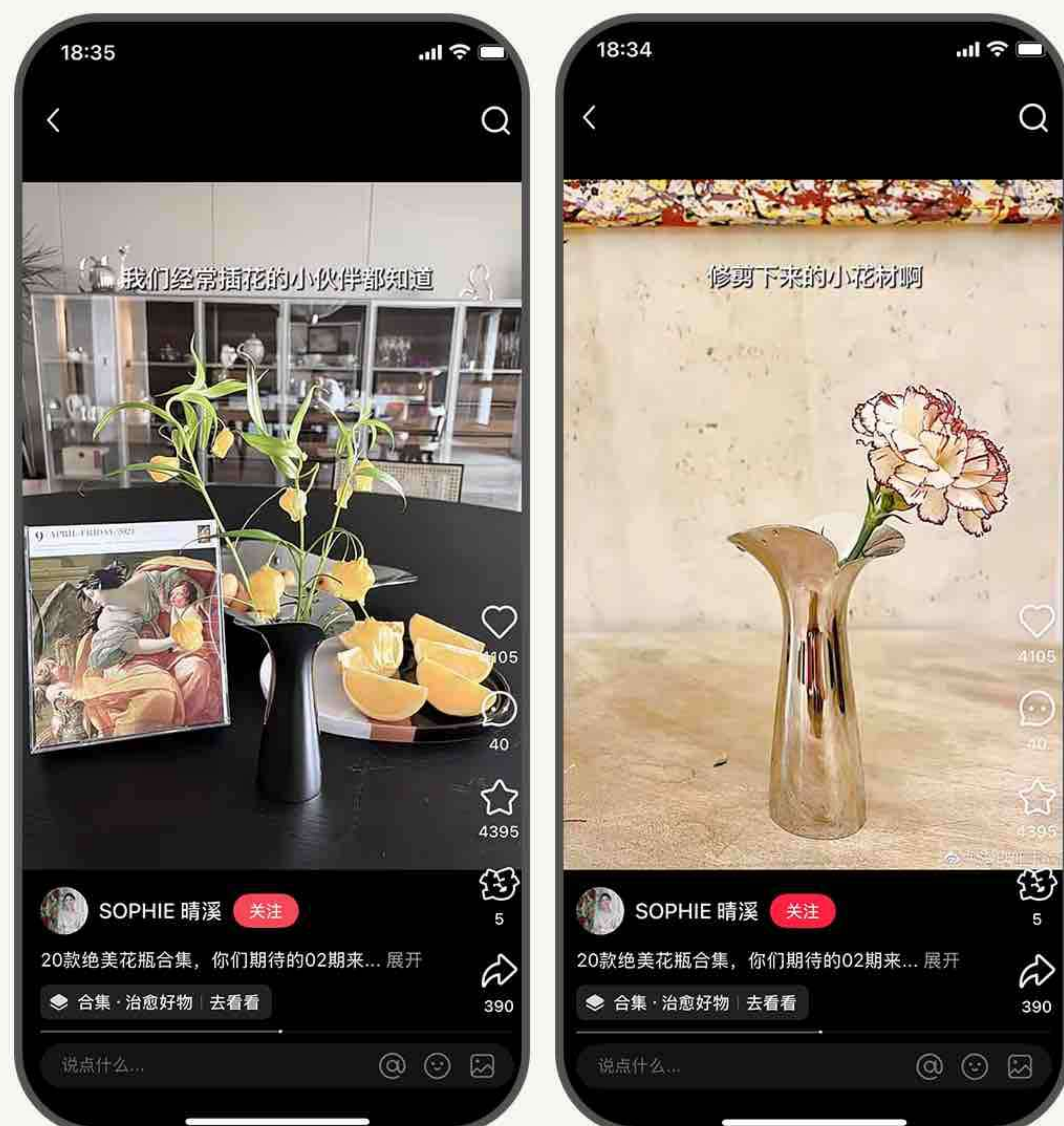
Georg Jensen x Xiaohongxing Program: A Full-Funnel K-F-S Seeding to Sales Playbook

OBJECTIVE

Drive awareness and conversions for Georg Jensen's Tmall flagship store during 618 by integrating influencer seeding with paid Xiaohongshu traffic via the Xiaohongshu Star Program.

WHY XIAOHONGXING PROGRAM?

- **Trackability** – Clear data attribution across seeding, traffic, and sales.
- **Performance-driven** – Real-time ad optimization based on influencer note performance.
- **Lifestyle-aligned** – Scenario-based creators map to gifting, dining, and daily rituals.



STRATEGY

- Partnered with 17 creators across "table setting," "gifting moments," and "quiet luxury" scenes.
- Combined influencer posts with paid traffic via Info Feed & Search ad placements.
- Key content themes: "Minimalist Aesthetics," "Timeless Silver," and "Art of Everyday Objects."

RESULTS

Over 3 million impressions, 400K+ clicks, and 25K engagements. Generated GMV of 500K+ RMB with ROI of 1.47. Boosted follower growth and first-time buyer rate for the new Tmall store.

KEY TAKEAWAY

Georg Jensen successfully activated Xiaohongshu's K-F-S (KOL–Feeds–Search) system to build a data-driven seeding-to-sales pipeline, translating lifestyle storytelling into measurable luxury conversions.

As platforms evolve their tools and mechanics, the bigger question for brands is how to build sustainable growth beyond the spike of a sales event.

1UP's 618 campaign work shows that long-term thinking isn't just about planting more content, it's about turning great content into reusable assets, and building systems that connect awareness to conversion, and conversion to retention. Whether it's reactivating existing influencer content or designing full-funnel pipelines from seeding to sales, our approach helps brands turn campaigns into repeatable growth models.

THANKS FOR READING!

Want to learn more about what we do?

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#MORETOCOME#

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ABOUT 1UP

Present in Shanghai, Hongzhou and Paris, 1UP digital helps brands of the luxury industry navigate the market by providing them with sustainable digital strategy, result-driven execution plan and most up to date innovations & technologies.

We aim to bridge the gap between premium brands & consumers, and level up brand digital retail system.

OUR SERVICE SCOPE

We're full service digital agency offering customized solutions to reach the luxury consumers across all channels.

OUR VISION

We believe in never standing still. For the better, for the extraordinary, for the experiences that go beyond the expected. We're 1UP. and we are creating the future of digital retail as the industry want it.

OUR PEOPLE & CULTURE

It's all about the team. We're extremely proud that we grouped the most dynamic digital experts in the field spinning from luxury to fashion, from agencies to inhouse brand. We operate in Shanghai, Hongzhou, and Paris with +100 high-level team members. We're young, passionate & diverse!