The *RedNote* Luxury Index

2025.

The definitive benchmark for luxury brand presence and performance on RedNote

Word From DLG.

China's social media landscape is undergoing a rapid transformation. UGC has emerged as a decisive factor in shaping the online journeys of Chinese consumers.

The driving force behind this shift is the growing demand for both the quality and authenticity of online content — needs that brand-produced assets alone can no longer fully satisfy. In contrast, UGC — recommendations, feedback, and reviews shared by consumers themselves — has been gaining ever greater influence over purchase decisions. At the centre of this evolution stands RedNote.

Today, 90% of all content on RedNote is created by everyday users, with more than 6 million new posts and 60 million comments published each day, covering every facet of contemporary Chinese lifestyles. This makes brand visibility on the platform one of the most direct and authentic indicators of market heat, while also reshaping how brands approach social media in China.

When we launched the first edition of the *RedNote Luxury Index* in 2022, many luxury brands had yet to establish a presence on the platform, which remained largely dominated by beauty. Three years on, RedNote has evolved into a core pillar of luxury brands' digital strategies in China. Fashion now surpasses beauty in share of voice — yet compared to mass-market sectors, luxury adoption remains relatively measured.

In this year's *RedNote Luxury Index*, we once again join forces with with RedNote analytics platform Xinhong, defines benchmarks for the luxury sector across four pillars: Brand, KOL & KOC, Feeds, and Search. Using our proprietary RISE (RedNote Influence & Strategy Evaluation) methodology, we identify the brands with the strongest brand voice, investment effort, and heat on RedNote today.

We hope this report provides both a clear picture of where the industry stands and a source of inspiration for how brands can navigate — and thrive in — China's evolving social media era.

PABLO MAURON.
Managing Partner China & Board Member
DLG

Word From Newrank.

As China becomes the "core engine" driving the growth of the global luxury market, an increasing number of top international brands are accelerating their efforts to deeply cultivate this fertile ground. They must not only adhere to the global brand identity that has been passed down for a century, but also understand the cultural context and emotional needs of Chinese consumers. They need to convey their brand essence through classic products while also finding the dialogue code with Generation Z and the new middle class amid the waves of youthfulness and digitalization.

Undeniably, this "China adaptation battle" in the global luxury market is essentially a deep integration of "global vision" and "local wisdom," testing brands' ability to balance cultural resonance, user trust, and commercial conversion.

As a content technology company deeply engaged in new media data, data is the "key" for us to decode the connection between global brands and the Chinese market, and it is also the core advantage of our collaboration with the professional institution DLG this time. Through this joint release of the report, we focus on RedNote, a "key ground" for global brands localising in China. Relying on the deep collaboration between both parties in platform data mining and brand research, we present to our clients a true picture of international brands' marketing in the Chinese market — from the adaptability of content strategies to the depth of user interaction, from the creation of trending topics to the accumulation of long-term brand awareness.

In the future, Newrank will continue to take data as the foundation and technology as the key, deepening its support for global brands' insights and helping global brands, including luxury brands, achieve dual growth in "global brand power" and "local influence".

Thank you once again to all sectors for your attention and support of this cooperation. We look forward to working with more industry partners and global luxury brands in the future to explore the best path for international brands to localise and share the booming opportunities in China's luxury market.

WEIYU CHEN.
President
Newrank

Methodology.

130 brands

Fashion	70 brands
Jewellery	25 brands
Watches	25 brands
Wine & Spirits	10 brands

Download the *RedNote Beauty Index*, released this September, featuring 70 premium beauty brands across skincare, makeup, and fragrance categories.

Data source:
Jan-June 2025

Performance is analysed using:

- Brand account and content performance
- Influencer paid collaboration
- Brand mentions and social buzz
- Search volume by brand and keyword

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01. Overview

What does the RedNote community mean for luxury brands — and how should they approach this audience with a structured, strategic mindset?

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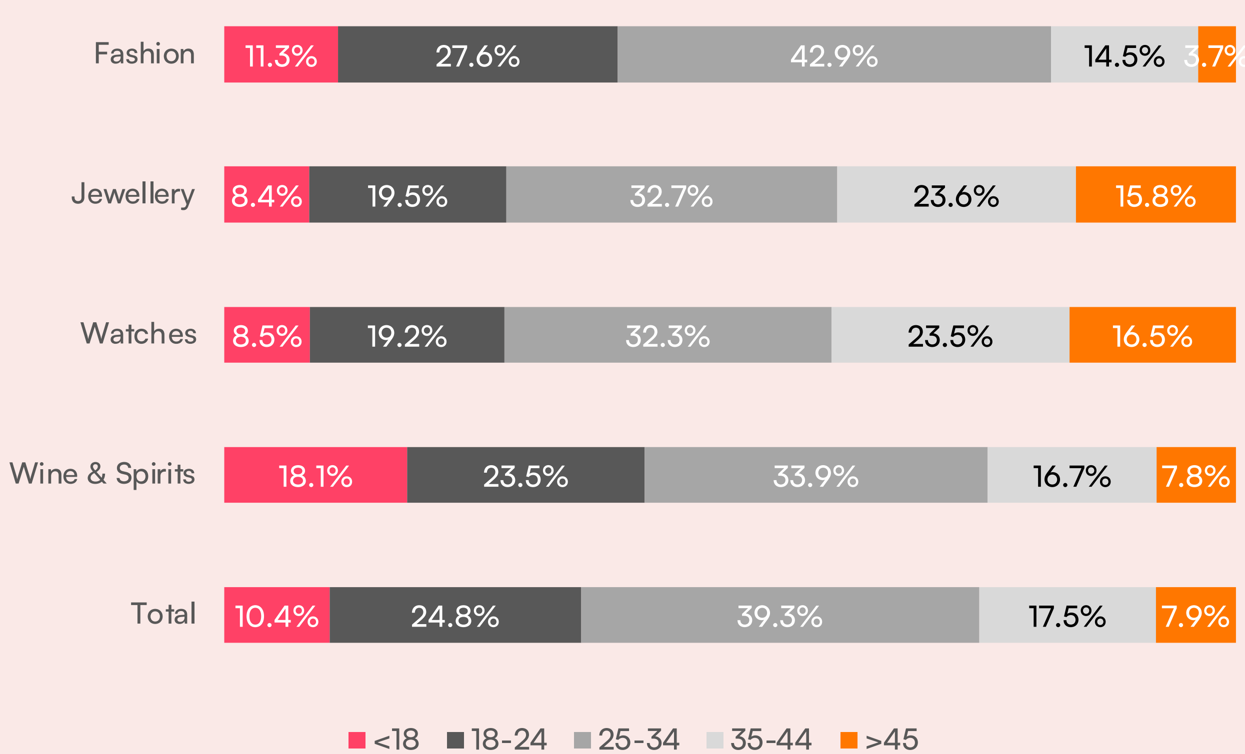
A New Luxury Community.

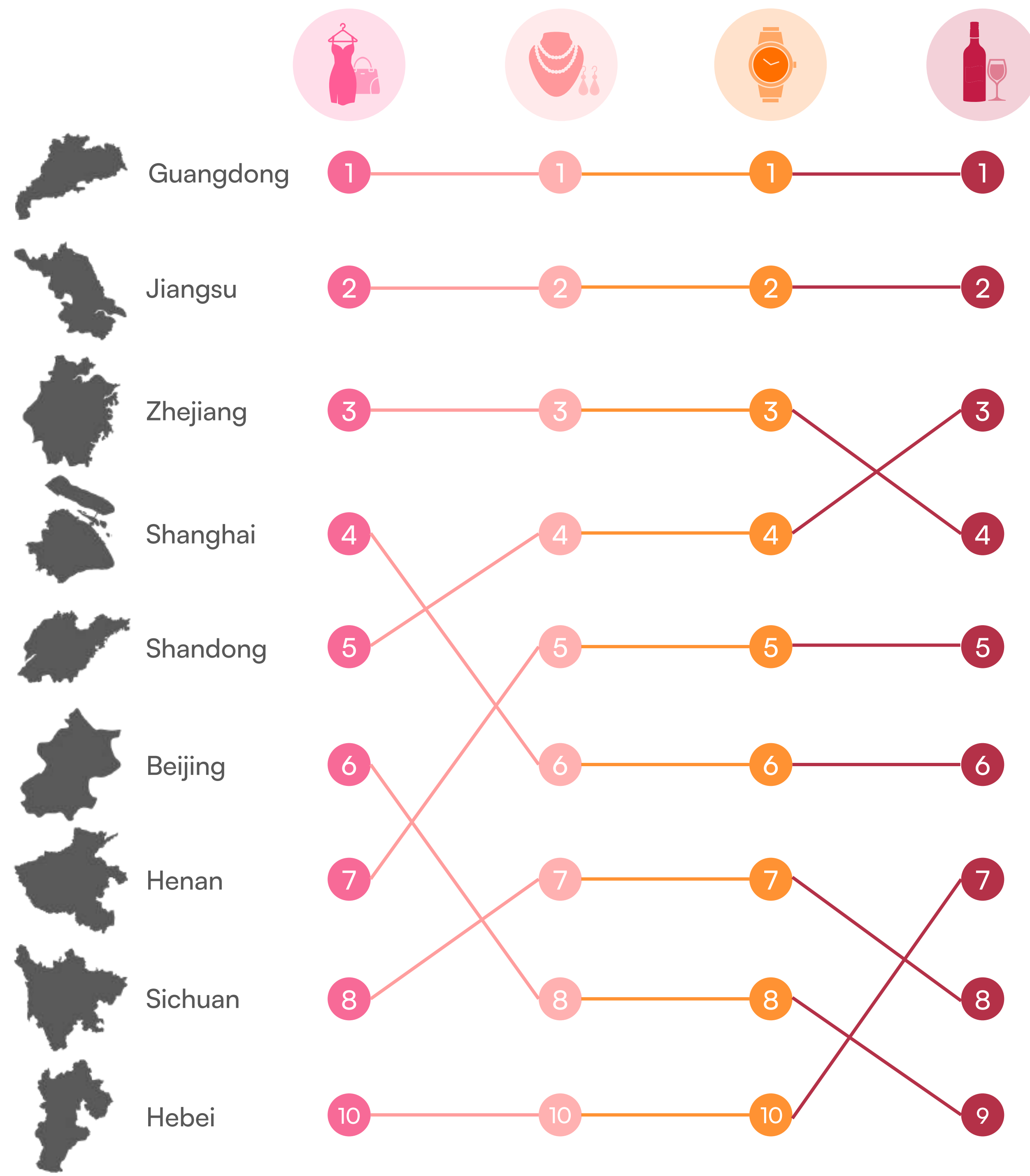
Demographic

On RedNote, the luxury community has a distinct demographic profile. Data reveals a significant concentration in specific regions of China, with Guangdong and Jiangsu leading in community size. For hard luxury sectors like Watches and Jewellery, the age distribution is more mature, with a larger proportion of users in the 25-34 and 35-44 age brackets.

AGE DISTRIBUTION OF THE LUXURY COMMUNITY ON REDNOTE



TOP REGIONS BY LUXURY COMMUNITY SIZE ON REDNOTE



A New Luxury Community.

Fan base

An analysis of the fan base distribution across categories reveals significant differences in their level of recognition and market maturity on the platform. Fashion and Jewellery show a wide range in their fan base size, with a high concentration of brands in the mid-range and significant outliers. This indicates a mature market where a few powerhouse brands have achieved exceptionally high recognition, driving overall momentum for the category, while the majority of brands maintain a strong, consistent presence.

In contrast, the Watches and Wine & Spirits categories exhibit a much more compressed fan base distribution, with a lower median and fewer outliers. This points to a more niche and specialised level of recognition, particularly on a platform where women make up 70% of the user base.* The more uniform distribution and absence of large outliers in these categories highlight a stable but less dynamic brand presence, where brands generally have a smaller but more targeted following.

FAN BASE DISTRIBUTION BY CATEGORY

*Data source: RedNote

Note: The line within the box represents the median; the 'X' symbol indicates the average.

A New Luxury Community.

Growth rate

On RedNote, fan base growth reveals two distinct patterns across luxury categories. While Fashion and Jewellery have wide fan base ranges and mild average (both at 13.7%), their overall growth is modest and highly varied. A few brands of fashion with negative growth highlights this volatility. Nevertheless, both are capable of high-momentum growth, with outliers like Chanel in Fashion (amassing 20,000 followers in just one month) and brands like Qeelin and Laopu Gold in Jewellery demonstrating this potential.

In contrast, the Watches category, with its smaller average fan base, also shows a significant negative growth across several brands, but is distinguished by high-performing outliers like Rado, Richard Mille, and Tudor, which have growth rates exceeding 100%. This suggests that despite low momentum, with a median growth rate 10.0%, there is significant potential for rapid fan base growth within this niche. Conversely, the growth pattern in Wine & Spirits shows very limited momentum, with a low median growth rate at 5.5%.

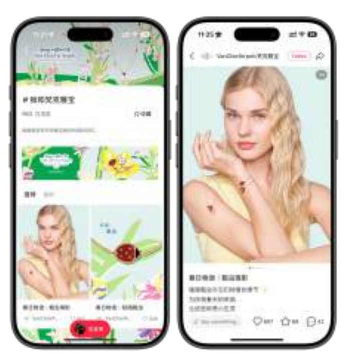
GROWTH RATE DISTRIBUTION BY CATEGORY

Note: The line within the box represents the median; the 'X' symbol indicates the average.

Consumer Journey.

Full funnel engagement framework

Brand & Product awareness → Product seeding & Interest build → Lead conversion & Data capture → User Advocacy & WOM Amplification

	Awareness	Interest	True Interest	Purchase/Leads	Share
Definition	Passive exposure to a brand or product	Users show initial interest and form brief recall	Brand/Product intent-driven search with deeper exploration	Development of purchase intent with identifiable conversion signals	Emotionally driven sharing behaviour
Typical action	Launch screen view Feed exposure	In-feed content reading Curiosity-driven interactions	Proactive search Repeated in-depth reading	Leads generation 1:1 Conversation with BA*	Enthusiastic posting Positive commenting
User journey					

*Brand Ambassador

Consumer Journey.

BKFSC framework

The KFS framework, introduced by RedNote in 2022, serves as a guideline for brands to optimise their communication and investment on the platform. However, for a luxury audience, the framework's scope must be expanded. Luxury brands, unlike FMCG brands, need to establish a distinct brand presence (B) and a clear path to conversion (C). This necessitates an augmented approach that incorporates these additional elements to form the comprehensive BKFSC framework.

This refined framework provides a strategic roadmap for luxury brands. It allows them to intelligently allocate resources across each segment — from building brand awareness to driving sales — based on their current market penetration and specific business objectives.

	B Brand	K KOL & KOC	F Feeds	S Search	C Conversion
Definition	Activities centered around a brand's official RedNote account	Paid and free influencer activations between brands and celebrities, KOLs, and KOCs	Brand visibility and social buzz driven by both paid ads from the brand and organic user-generated content	Brand desirability and visibility reflected by user search activities	E-commerce business or other conversion-driven efforts by brands on the platform
Performance Benchmark	• Follower growth and profile • Level of follow activity • Level of engagement • Content output frequency • Content quality and resonace	• Commercial notes* volume • Level of engagement of commercial notes • Influencer mix effectiveness • ROI of influencer activations • Alignment with brand messaging	• Share of voice • Audience sentiment • Content virality • In-feed ads performance	• Search volume • Share of search • Search ads performance • Brand zone performance	• EC conversion rate • Data capture capability • Drive-to-store capability

** A commercial note refers to any brand-sponsored post published by an account and facilitated through or reported on Pugongying.*

Executive Summary.

I. Fashion dominates the premium sphere

Once seen as a beauty-led platform, RedNote has evolved into a core arena for luxury conversation. Fashion now accounts for 50.0% of share of voice — well ahead of beauty's 27.2% — reflecting a clear shift in consumer intent and content focus.

II. Early stage of the consumer journey

Compared with beauty, most luxury consumers remain in the early stages of their consumer journey on RedNote — one-third of searches are only brand-name driven, indicating a phase of brand discovery rather than conversion.

III. Paid collaborations remain limited

Luxury brands leverage far fewer paid influencer posts (9.9 per brand per month) than beauty (152.6). This gap reflects how most luxury players are still prioritising brand account building over influencer collaboration on the platform.

Executive Summary.

IV. Video outperforms but remains underutilised

Although video makes up only 28% of total brand content, it captures 45% of readership — suggesting brands should prioritise richer storytelling formats to maximise engagement.

V. A developing KOS ecosystem

Nearly all fashion and jewellery brands now connect offline retail with RedNote via official accounts, and over half have adopted certified brand ambassador programmes provided by the platform — signalling a move toward more integrated and brand-aligned social selling.

02. Brand

A brand's official account is the foundation for marketing on RedNote. Which brands are best at capturing attention and engaging users on the platform?

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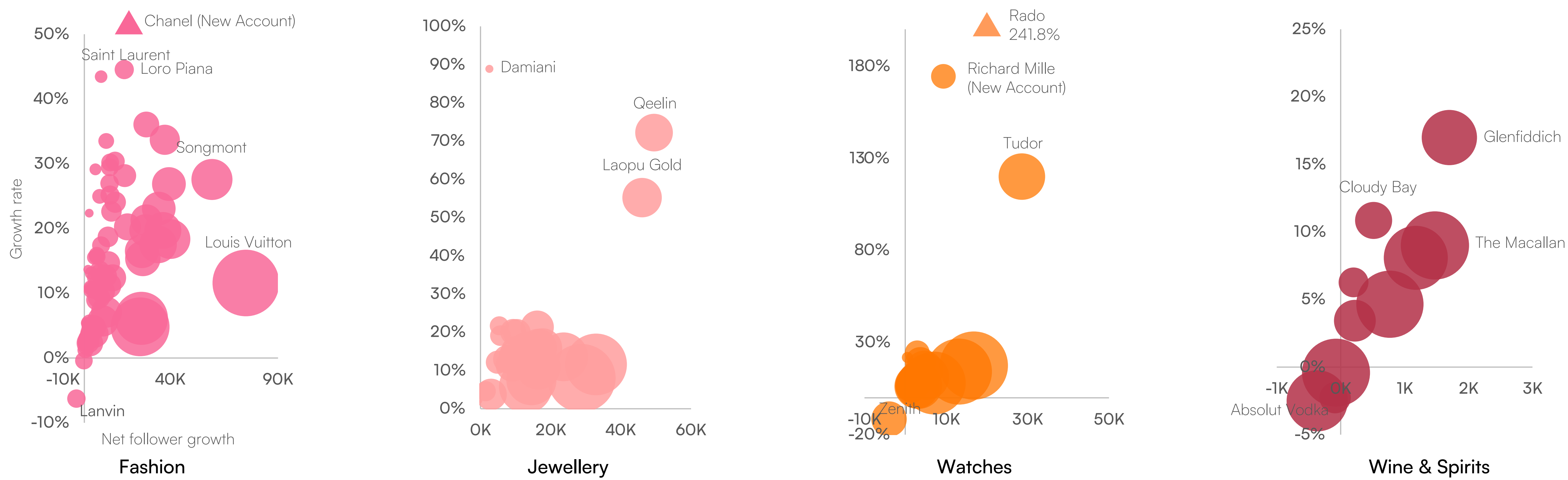
Fan base.

Growth rate

A strong correlation exists between outlier fan growth and high-impact celebrity marketing. Top performers leverage strategies from major ambassador announcements (Rado) and sustained star collaborations (Saint Laurent, Qeelin) to niche partnerships (Richard Mille), while Chanel secure an impressive net growth in one month by its strong debut on RedNote.

These growth patterns reveal distinct market structures. Fashion's ecosystem is mature yet dynamic, with titans like Louis Vuitton securing immense net growth while agile players challenge the status quo with high growth rates. In contrast, the Jewellery and Watches industries are more polarised, where challenger brands like Rado achieve breakout growth rates against the steady, volume-driven presence of established players like Tudor.

FAN GROWTH RATE VS. NET FOLLOWER GROWTH (6M)



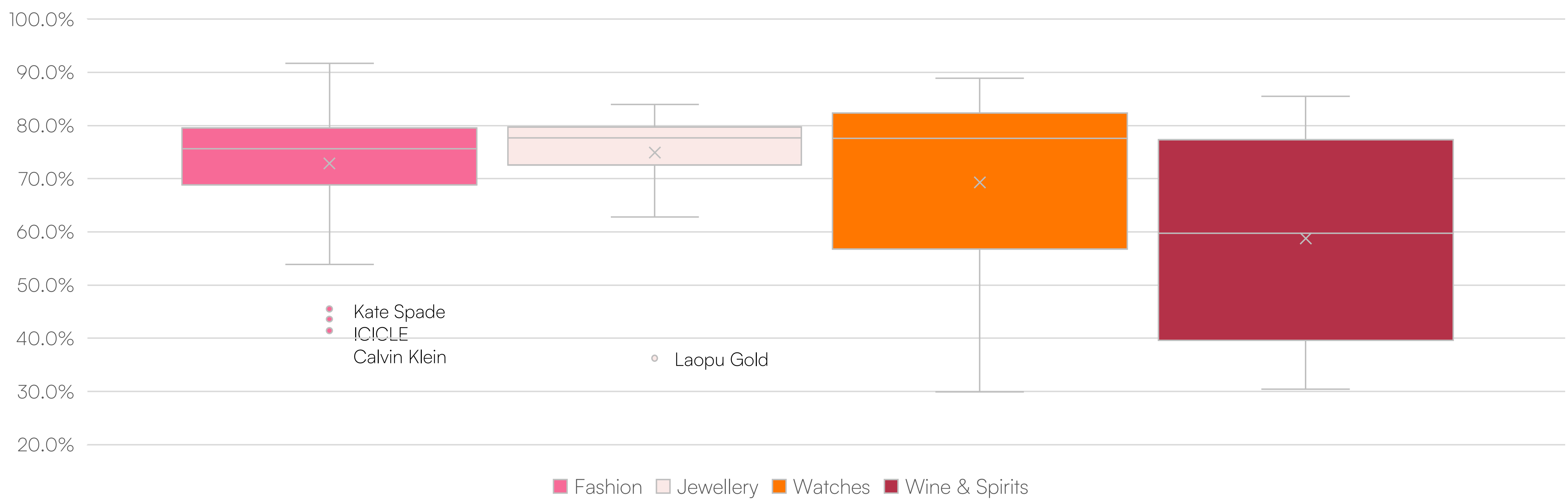
Fan base.

Active followers*

A brand's active follower rate is critical for organic virality on RedNote, as it signals the algorithm to amplify brand content. The distribution reveals a clear maturity gap: Fashion and Jewellery show high, consistent active follower rates above a 70% median, signalling a mature content engagement. In contrast, Watches and Wine & Spirits exhibit a much wider, polarised performance, indicating a less established playbook for fan engagement for their official accounts on RedNote.

Brands with low active follower rates often struggle because their content lacks authenticity and resonance, or because followers acquired through broad campaigns or celebrity endorsements aren't genuinely interested in the brand. To drive sustainable engagement, accounts must become community hubs to cultivating an active follower base for long-term organic growth. This requires a strategic shift to value-driven content, combined with active user interaction and authentic influencer collaborations.

ACTIVE FOLLOWERS DISTRIBUTION BY CATEGORY



* Active Followers is a benchmark defined by Xinhong, leveraging machine learning trained on user behaviour to identify the proportion of highly engaged users, measured through actions such as likes, comments, favourites, and shares.

Note: The line within the box represents the median; the 'X' symbol indicates the average

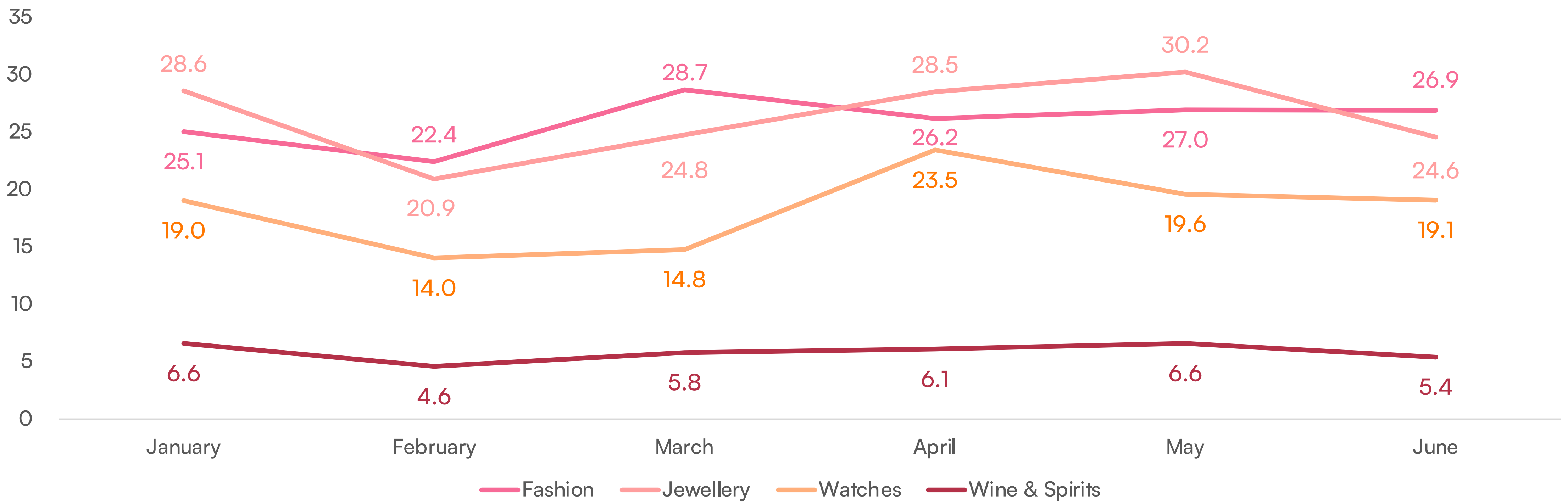
Posting frequency.

Monthly posts

Content strategies on RedNote clearly diverge by industry. Fashion and Jewellery maintain a high-frequency, consistent cadence for market relevance. Watches adopts a more measured, mid-frequency cadence, whilst the Wine & Spirits industry maintains only a minimal baseline presence. The February dip across all categories is not a decline, but a strategic post-Lunar New Year reset common to the luxury sector in China.

These unique content rhythms are closely tied to each industry's specific marketing calendar. Fashion's March peak aligns with the global fashion show season. Similarly, Watches concentrates its posting into a sharp April peak, driven by the "Watches and Wonders" event. Meanwhile, Jewellery's cadence shows a sustained build-up from March to May, indicating a clear strategic focus on the 520 festival.

AVERAGE MONTHLY POSTS PER BRAND BY CATEGORY*



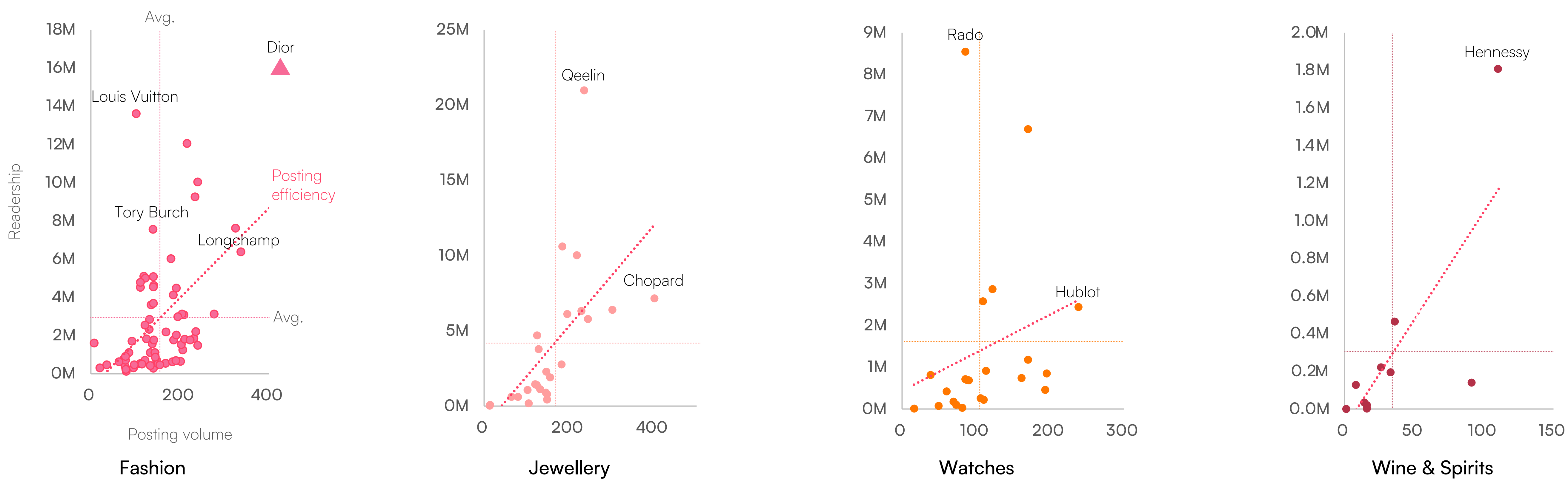
Posting frequency.

Posting efficiency

The posting activity on RedNote is a direct reflection of each category's market scale and potential readership. Fashion and Jewellery command the largest readership. This justifies the high content volume from brands in these sectors, as the potential return is obvious. In contrast, Watches and Wine & Spirits operate within a more niche audience, with a correspondingly lower content output and a significantly smaller total readership ceiling.

For Fashion and Jewellery, the two industries commanding the largest audiences, success lies in surpassing the category average. Outliers like Dior and Qeelin are doubly successful, excelling well above their peers. While brands like Rado and Hennessy are strong performers relative to their own trendline, their success is scaled within a smaller market, showing that a brand's ultimate reach is defined by its category's ecosystem.

READERSHIP VS. POSTING VOLUME (6M)



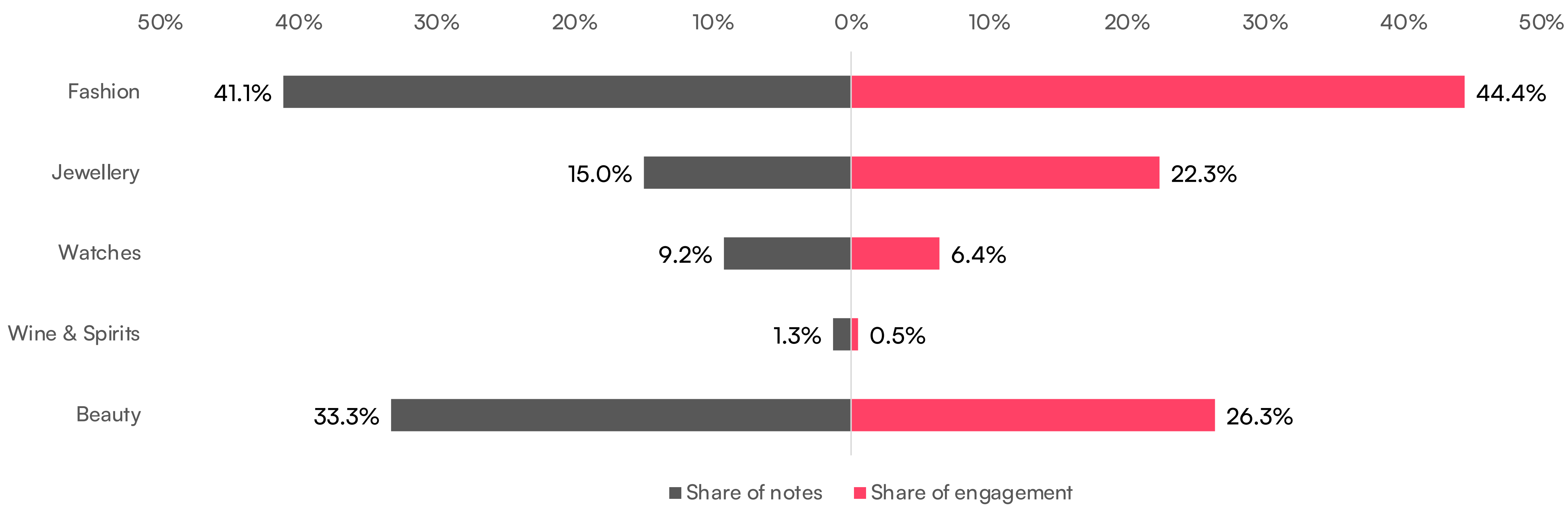
Level of Engagement.

Engagement volume

Jewellery emerges as a standout in content efficiency. Despite contributing a moderate 15.0% of the total post volume, it captures an impressive 22.3% of the total engagement, proving its content is highly resonant and punches well above its weight. In contrast, Fashion achieves its dominant 44.4% engagement share through a strategy of massive scale, producing the largest share of content on the platform at 41.1%. While effective, its efficiency on a per-post basis is less pronounced than Jewellery's.

The engagement efficiency gap remains a significant challenge for the niche luxury sectors. Watches contribute 9.2% of posts but secure only 6.4% of the engagement, while Wine & Spirits is the most challenged, with 1.3% of content generating a mere 0.5% of engagement. The success of Jewellery provides a clearer lesson for niche categories: a targeted, high-quality, and culturally resonant content strategy is more likely to yield outsized returns than attempting to win on sheer volume.

SHARE OF POSTS VS. SHARE OF ENGAGEMENT BY CATEGORY

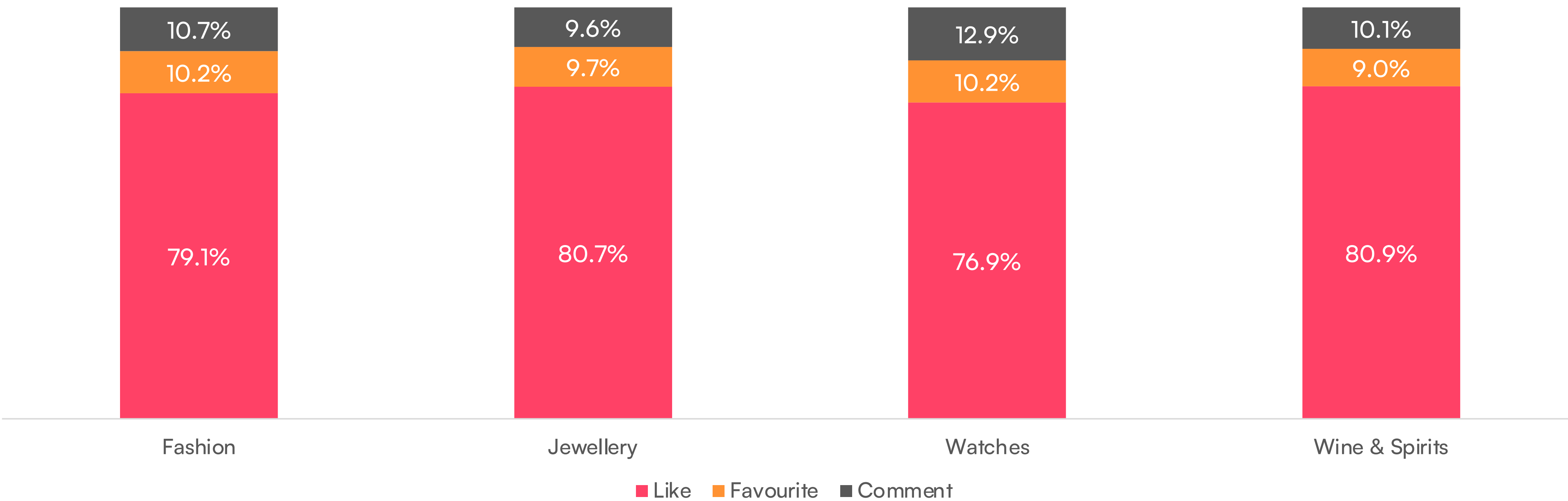


Level of Engagement.

Engagement type

The engagement breakdown reveals a consistent industry pattern on RedNote: while lightweight “Likes” form the vast foundation of interaction (~80%), the true strategic insight lies in the mix of deeper engagement signals. The ~20% of engagement composed of “Comments” and “Favourites” serves as a crucial barometer for brands. A higher share of “Comments” indicates strong community depth and discussion, often driven by technical or knowledge-based content. In contrast, a higher share of “Favourites” points to strong purchase intent and aspirational value, signifying that users are saving content for future reference. This highlights the need for a nuanced content strategy, where brands must decide whether to prioritise fostering discussion or creating savable, inspirational visuals to meet their specific business goals.

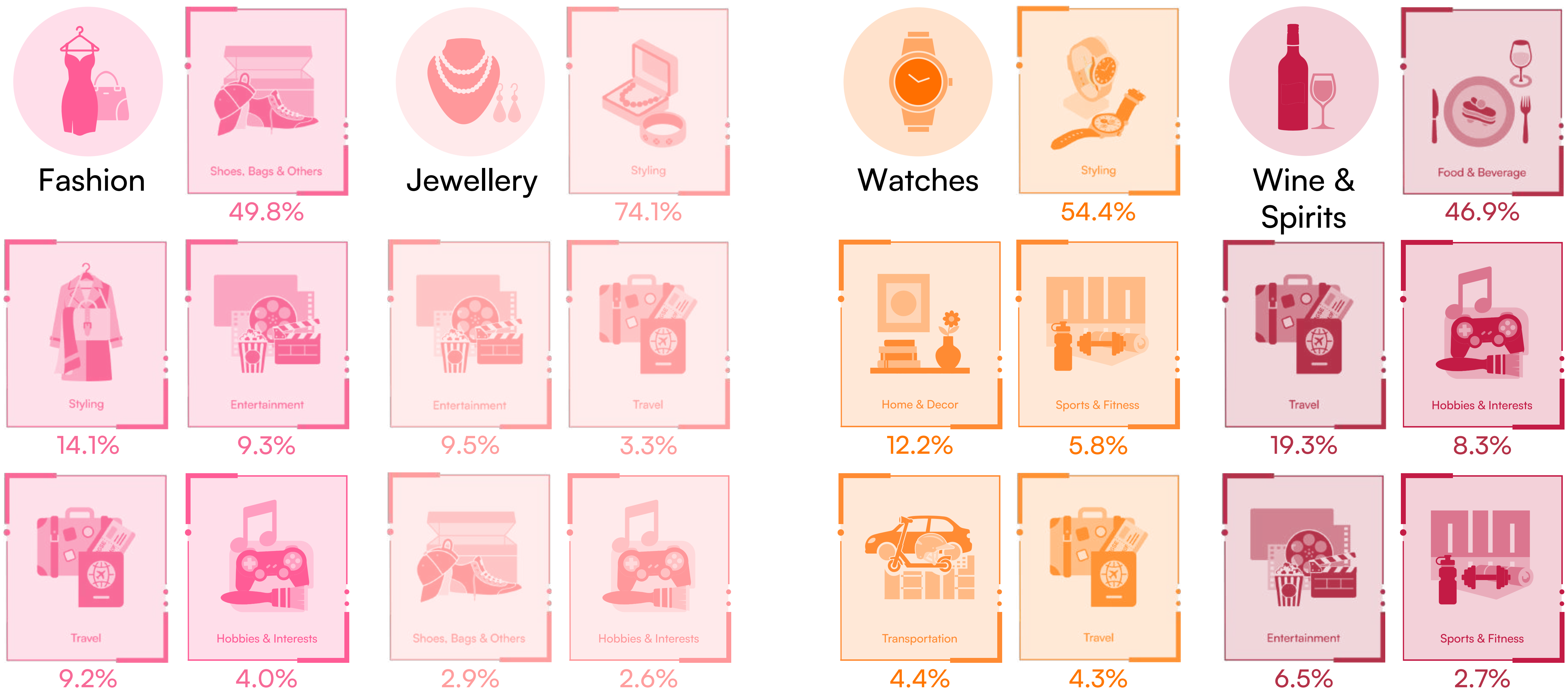
ENGAGEMENT BREAKDOWN BY CATEGORY



Content.

Content pillar

From the content pillars of brand notes, we can analyse how content is concentrated within each brand's own category. This data also reveals how brands are leveraging other content pillars to enrich their messaging and attract different consumer types.



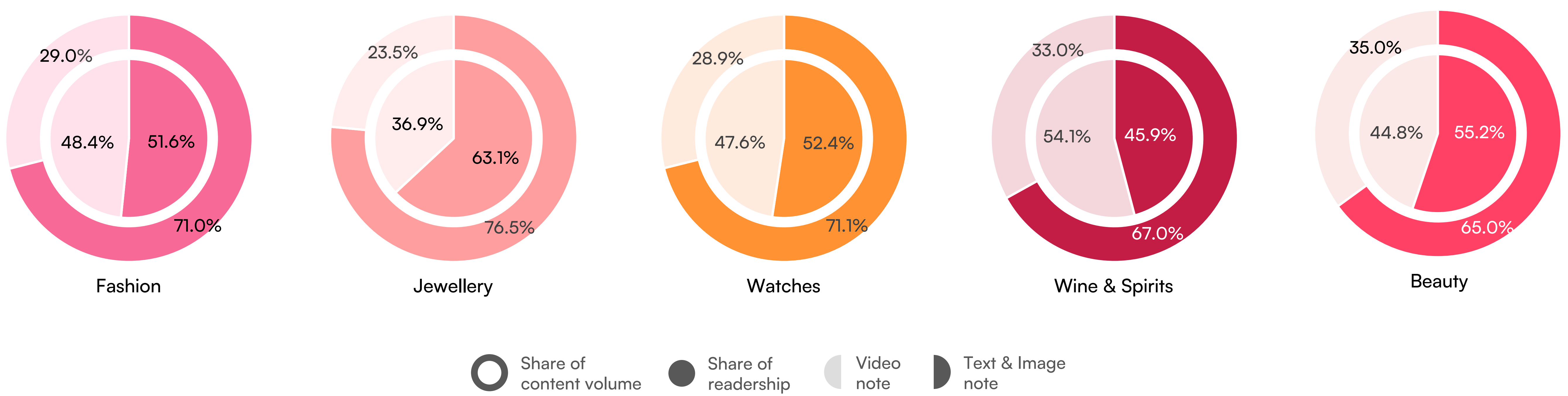
Content.

Content Type

Luxury brand strategies show a significant misalignment between posting effort and audience impact. Text & Image notes remain the dominant format by volume, accounting nearly 70% of all content, yet this high-volume format is outperformed by video. This creates a critical strategic dilemma, as video production is significantly more costly. Simply abandoning the more cost-effective T&I format, which forms the foundation of content calendars, is not a viable option.

Given this, the challenge isn't just making more video, but making the massive volume of text & image content work harder. To boost readership, T&I content must align with RedNote's search-and-discovery nature. Brands must evolve static T&I posts from simple "ads" into high-utility, savable resources. This involves creating valuable carousels (like styling guides or comparisons) and writing keyword-rich, detailed captions, transforming the post from a passive broadcast into a resource users will actively consult for future reference.

CONTENT FORMAT EFFICIENCY: POST VOLUME VS. READERSHIP SHARE



*Inner cycle: Share of estimated readership volume; Outer cycle: Share of post volume

Milestone Activation.

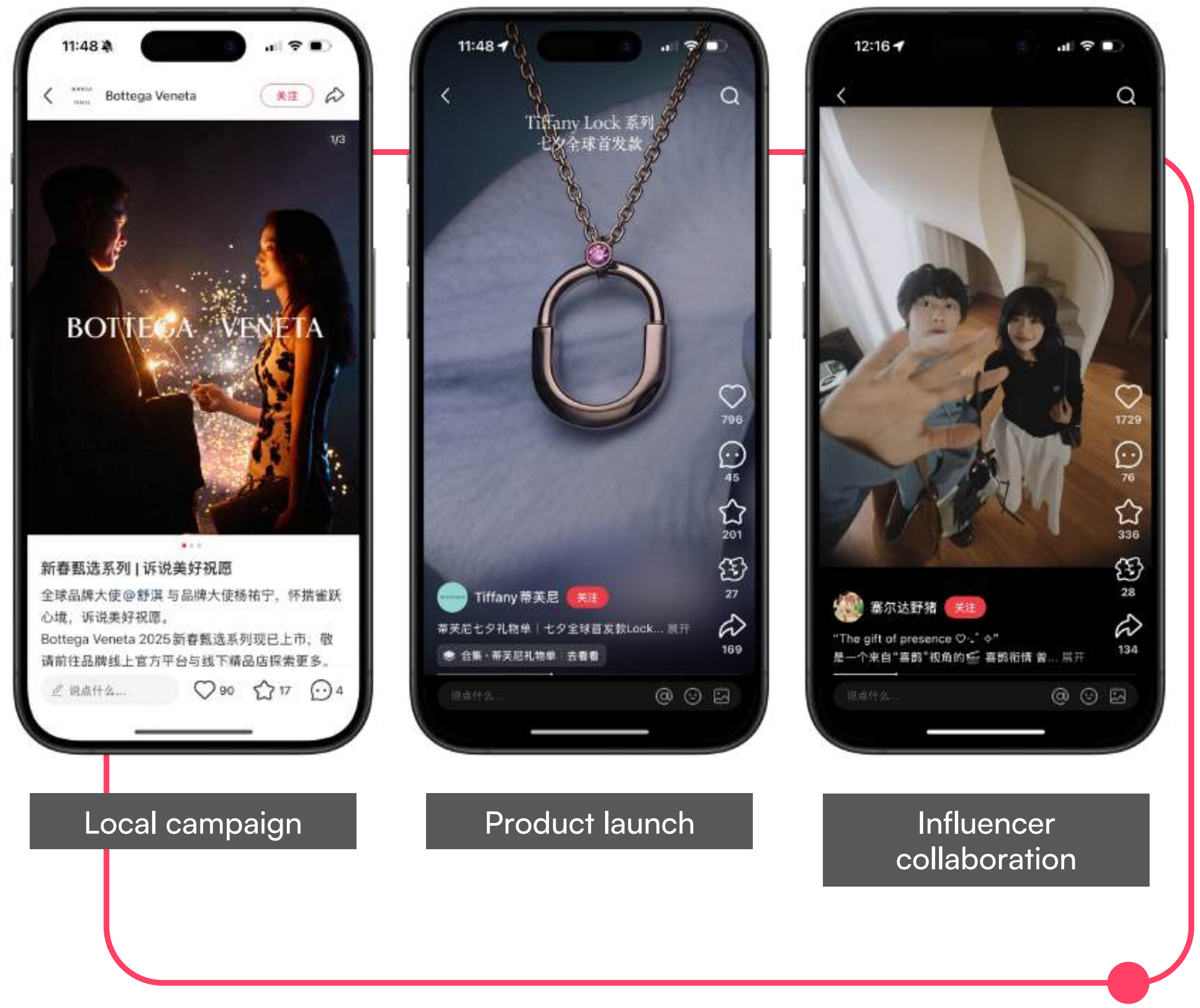
Overview

A brand's marketing calendar in China is shaped not only by its own key activations but also by five crucial local marketing milestones. These include the cultural celebrations of Lunar New Year, alongside the two paramount shopping events, Singles' Day and 618. As a vital communication channel, RedNote serves as a key lever for amplifying these milestone-driven conversations, which require a multi-pronged approach encompassing brand-led activation, organic discussion, and paid influencer marketing.

Milestone	Monitoring period*
Qixi Festival (2024)	26 July — 10 August
Singles' Day (2024)	27 October — 11 November
Lunar New Year (2025)	9 January - 24 January
520 Festival (2025)	5 May — 20 May
618 Shopping Festival (2025)	3 June — 18 June

*The date ranges shown do not refer to actual festival days, but the full monitoring periods, including brand warm-up campaigns and related platform activities.

MILESTONE ACTIVATIONS ON REDNOTE



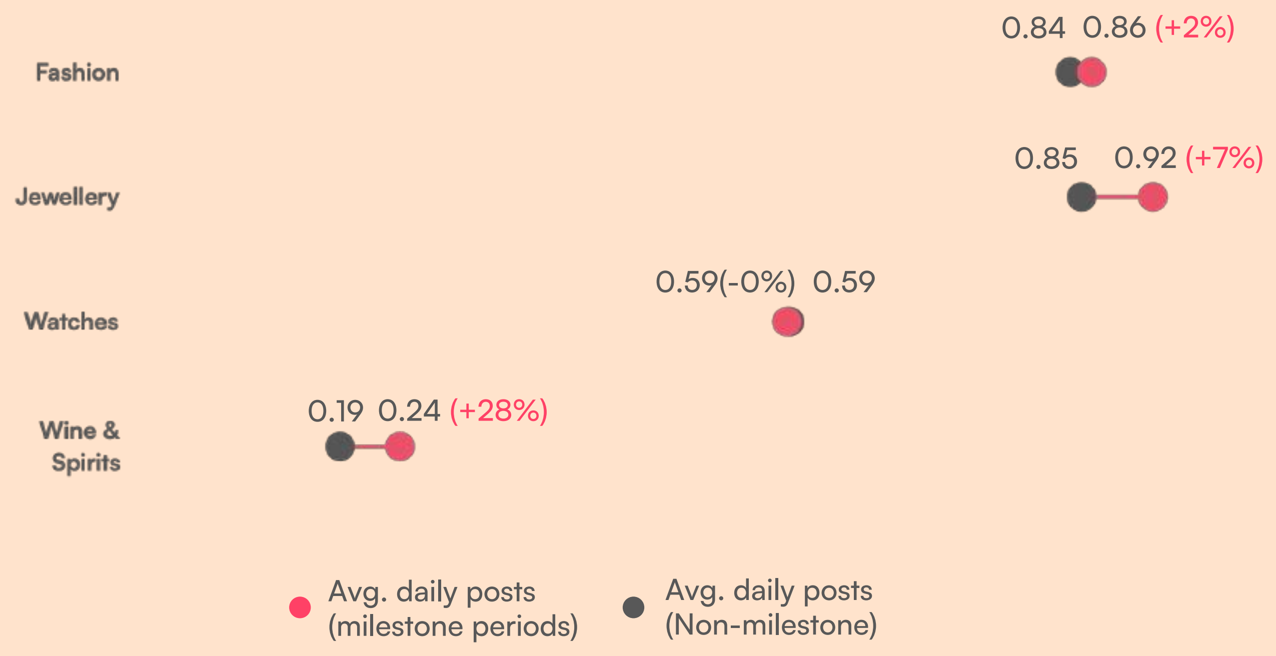
Milestone Activation.

Brand account

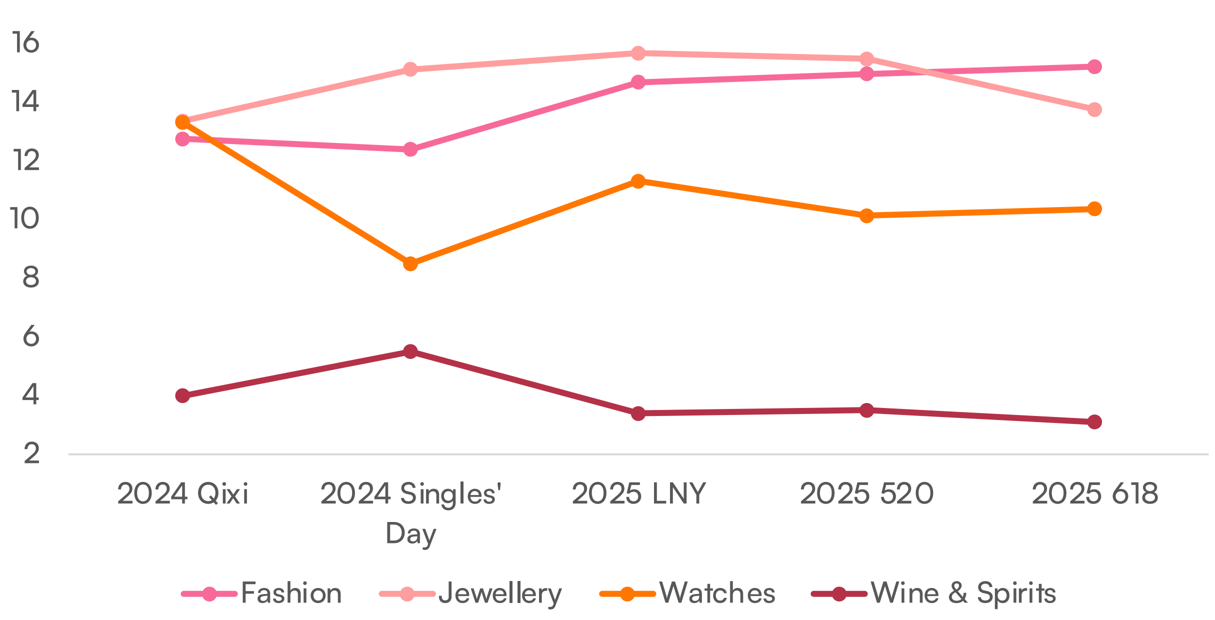
On RedNote, the level of posting uplift during key milestones reveals a category's reliance on the general marketing calendar. Jewellery, with less seasonality of its own, strategically uses these milestones for a "pulsing" effect to create moments of heightened activity. In contrast, Fashion's relatively flat volume reflects a more balanced brand-building presence, as its main activations are tied to its own industry calendar, such as Fashion Weeks, rather than these specific consumer festivals.

The festival-by-festival view highlights these differing priorities. Fashion and Jewellery maintain a consistently strong presence across all key events, underscoring their broad and ongoing relevance. Watches, by contrast, show a far more selective pattern of activity. Their distinct peaks and troughs point to a specialised campaign calendar, likely centred on specific product launches designed to maximise impact during gifting occasions such as Qixi, while deliberately steering clear of the noise surrounding major e-commerce festivals.

BRAND ACTIVITY UPLIFT DURING KEY MARKETING FESTIVALS



AVG. BRAND POSTING VOLUME ACROSS KEY FESTIVALS



Milestone Activation.

Brand account

Brand activation during milestones does not guarantee a surge in consumer engagement efficiency on RedNote. The luxury engagement resurgence in H1 2025 was most pronounced not during e-commerce events like Singles' Day and 618, but during culturally resonant campaigns around Lunar New Year and 520. During sales-driven festivals, luxury brands likely focus their RedNote content on subtle, brand-aligned messaging to drive traffic or awareness for specific collections, while concentrating their ultimate conversion-focused strategies on their owned e-commerce platforms.

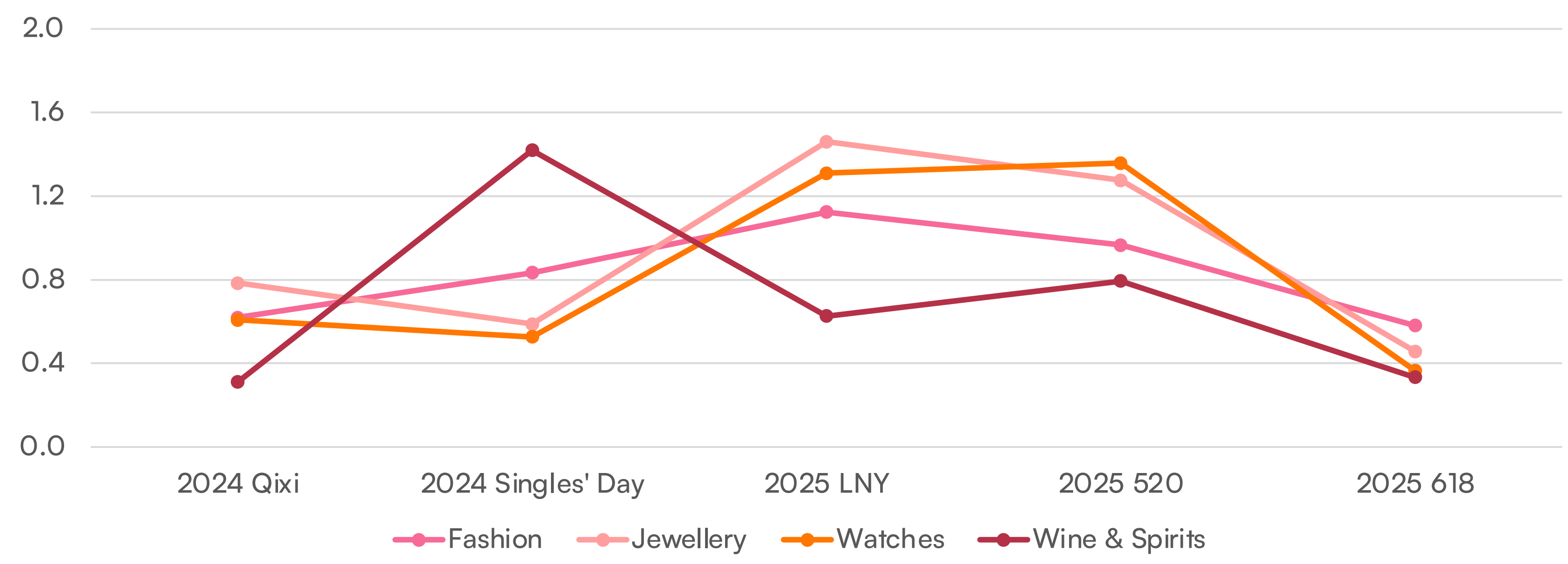
This trend reveals distinct strategic priorities. Jewellery and Watches lean heavily into the gifting nature of Lunar New Year and 520 to achieve their highest engagement efficiency. In contrast, Fashion's more stable performance reflects a consistent, "always-on" brand-building approach, showing less dramatic efficiency peaks during these specific consumer-facing festivals.

BEYOND THE CAMPAIGN BLAST: THE POWER OF "ALWAYS-ON"

On RedNote, the consumer journey starts well before a festival's peak. As a review and discovery platform, user search activity and engagement with authentic UGC often surge in the weeks leading up to a milestone as they build their consideration lists. To capture this intent, brands must shift from a last-minute campaign blast to an always-on seeding strategy, ensuring their products are part of the organic conversation long before the final purchase decision is made.

**The Engagement Efficiency Index compares the average engagement per post during a specific festival to the H1 2025 average.*

FESTIVAL ENGAGEMENT EFFICIENCY INDEX (H1 2025 AVERAGE = 1.0)*



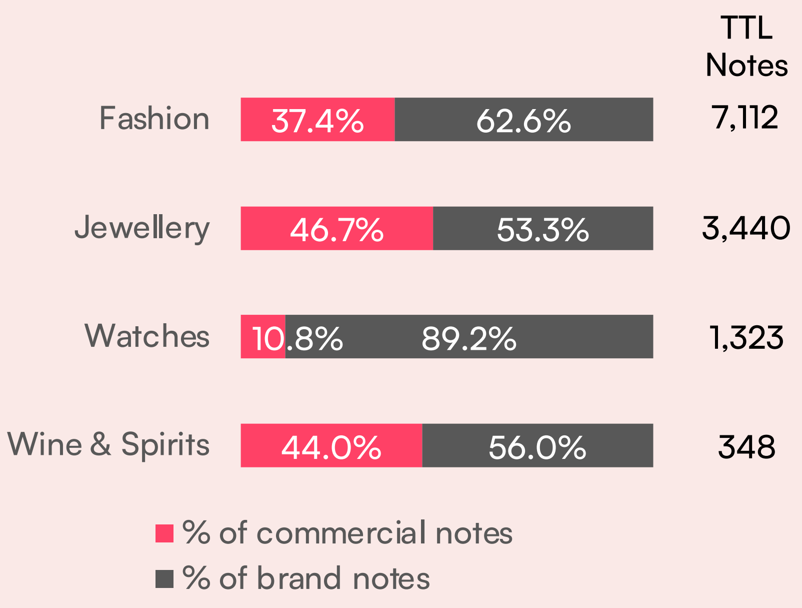
Milestone Activation.

Commercial notes

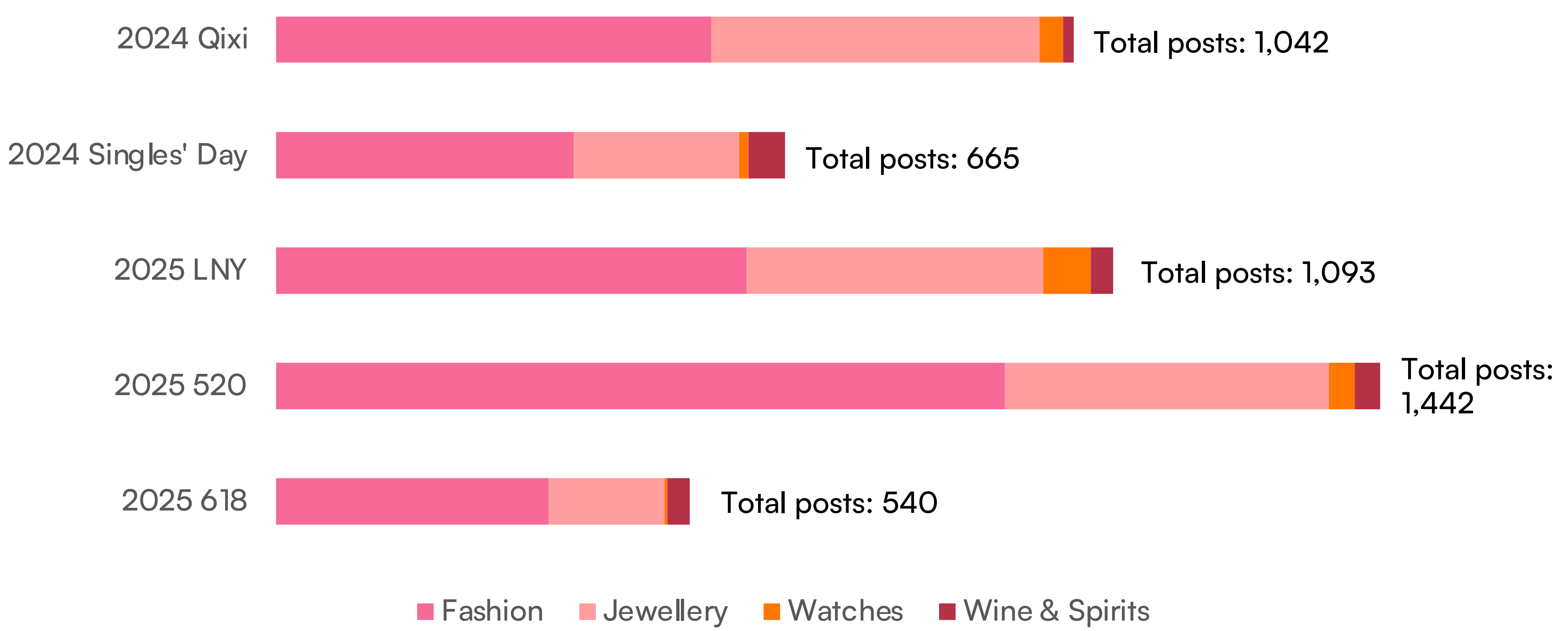
Paid content is a primary lever for amplifying brand voice during key festivals. Across every major milestone, Fashion consistently contributes the largest share of commercial notes, reflecting its massive scale. 520, Lunar New Year, and Qixi emerge as significant battlegrounds, attracting the highest total volume of paid collaborations. These cultural celebrations provide a fertile ground for brands to leverage diverse influencer mix, moving beyond pure product pushes to explore rich storytelling and aspirational themes.

While Fashion leads in scale, categories like Jewellery exhibit a strategic, targeted approach. Considering its smaller brand pool (25 brands versus Fashion's 70), Jewellery's active participation in the paid content market during gifting-focused milestones like 520 and Lunar New Year is particularly notable. During these periods, Jewellery's share of the paid conversation becomes far more significant, indicating an efficient deployment of partnerships to maximise impact during its most relevant seasons.

OWNED VS. PAID CONTENT
ON MILESTONES BY CATEGORY



COMMERCIAL NOTES BREAKDOWN BY MILESTONES



Milestone Activation.

Consumer intent

The evolution of organic WOM notes shows that consumer discussion on RedNote is driven by genuine cultural relevance, not just brand activation. This is evident during Lunar New Year, a period of intense brand marketing where organic discussion paradoxically hits a low point. This isn't a conflict with brand strategy, but shows that during this family-focused holiday, users are less engaged in content creation, with organic energy resurfacing around personally relevant, aspirational moments.

The peaks of organic discussion occur during Qixi and 520, when gifting drives engagement. These moments align with RedNote's core behaviour— seeking inspiration and sharing aspirational purchases. For Fashion, Jewellery, and Watches, they are key periods for authentic, peer-driven conversations. The June surge for Wine & Spirits came from The Macallan's new packaging, which reignited interest in its craftsmanship and heritage. This shows the most effective strategy is to align with moments of genuine consumer desire.

WOM NOTES EVOLUTION BY MILESTONES

03. KOL & KOC

Influencer marketing is essential for brands looking to connect with local audiences. How are brands performing when it comes to investing in influencer-driven content on RedNote?

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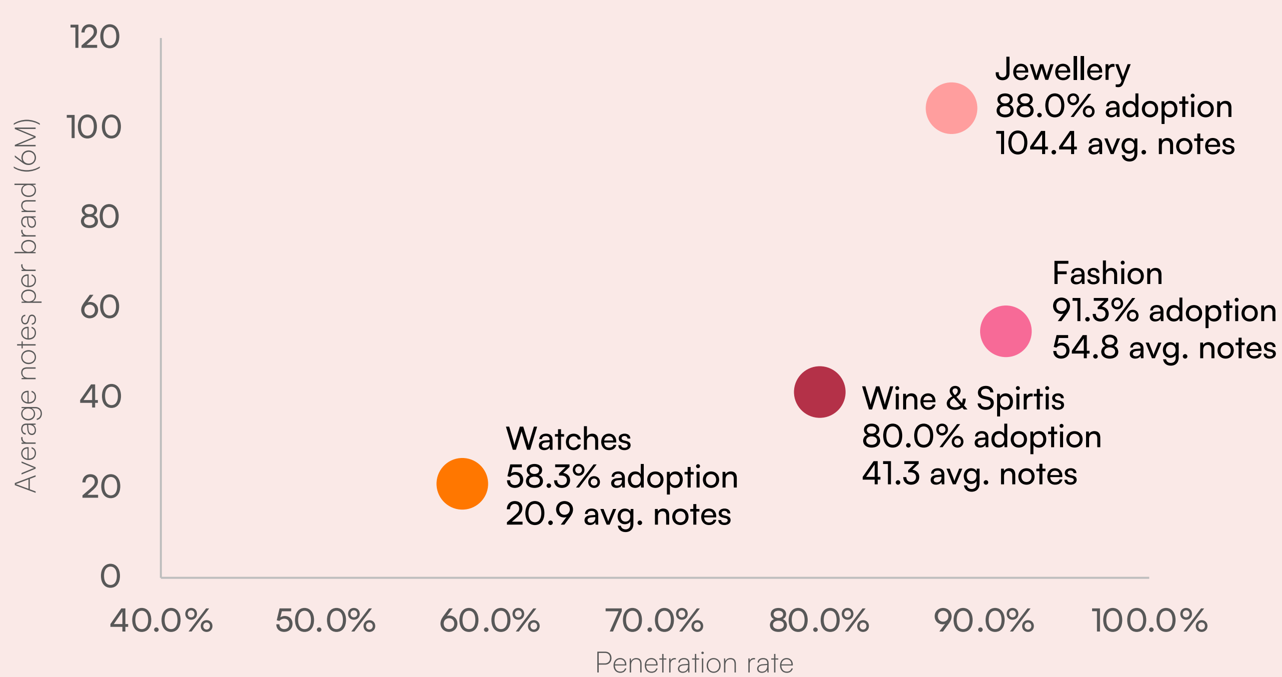
Commercial Notes.

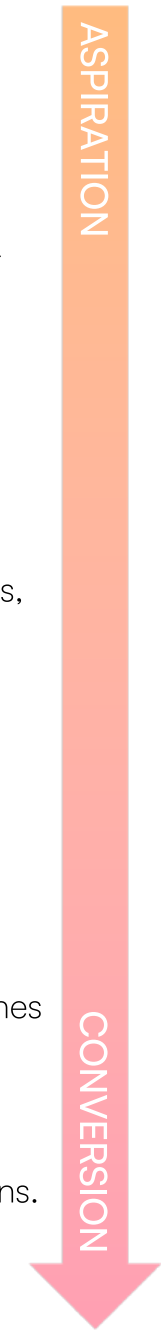
Overview

A commercial note refers to any brand-sponsored post published by an account and facilitated through or reported on Pugongying (蒲公英). This marketing approach enables brands to collaborate with influencers under platform supervision, promoting products, campaigns, or brand values through sponsored content. Today, such paid UGC can often generate greater impact than brand-owned content on RedNote.

PAID CONTENT STRATEGY MATRIX: PENETRATION VS. INTENSITY



KEY CONTENT PILLARS ADOPTED BY LUXURY BRANDS



VALUE-DRIVEN

Scenario: Building and reinforcing long-term brand equity by communicating evergreen brand DNA and values, such as craftsmanship, brand ethos, and sustainability.

Content: In-depth content from experts, influencers, or media partners exploring the brand's heritage and core values to build reputation and top-of-mind awareness.

CAMPAIGN-DRIVEN

Scenario: Short-term promotional pushes for key activations, including offline events, seasonal campaigns, and major marketing milestones.

Content: Thematic influencer collaborations targeting specific talking points to amplify share of voice, drive event participation, and boost sales conversions.

PRODUCT-DRIVEN

Scenario: Driving consideration for new product launches or sustaining desire for evergreen hero products.

Content: Content formats like unboxings, reviews, and aspirational "glam shots" designed to showcase the product, stimulate purchase intent, and drive conversions.

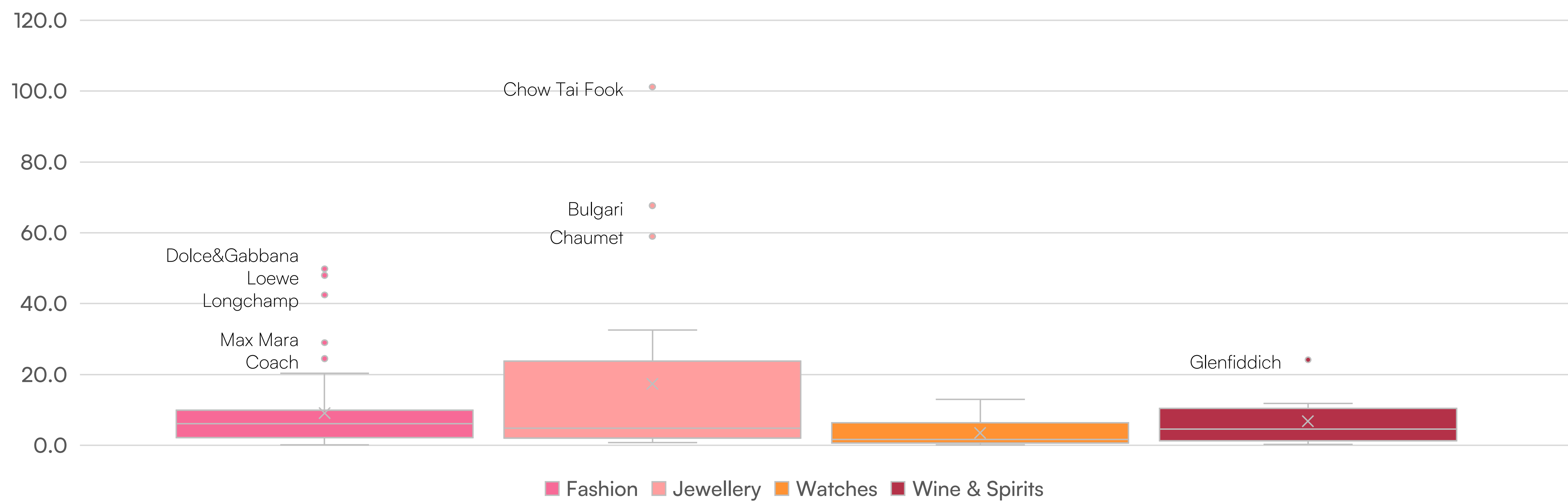
Commercial Notes.

Volume of commercial notes by category

The frequency of paid content reveals a clear strategic divide. Jewellery is the most aggressive category, with the highest average posting volume, signalling an investment-heavy and competitive landscape. In sharp contrast, the Watches category employs a notably muted paid strategy with the lowest median frequency and a highly compressed distribution. Fashion and Wine & Spirits also follow a more conservative and selective approach to paid content compared to the Jewellery sector.

The outliers highlight specific strategic goals. In Jewellery, extreme volume from from Chow Tai Fook aims for mass-market saturation, while high frequency from Bulgari defends a top-tier position. In Fashion, brands like Coach and Longchamp use paid content as a strategic accelerant, pulsing commercial notes to amplify their existing organic momentum. A single outlier like Glenfiddich in Wine & Spirits represents a concerted market-building effort in a nascent category on the platform.

MONTHLY VOLUME OF COMMERCIAL NOTES BY CATEGORY



Note: The line within the box represents the median; the 'X' symbol indicates the average

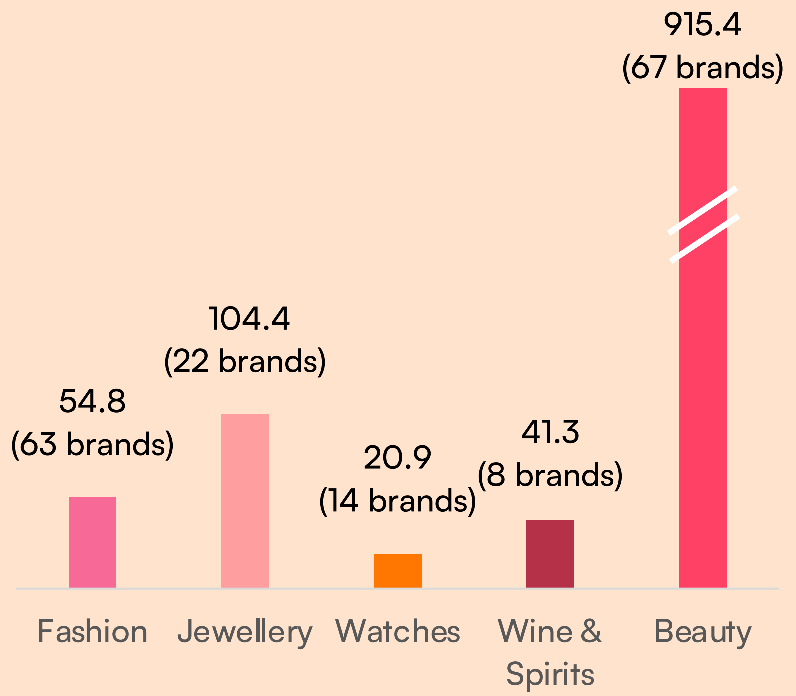
Commercial Notes.

Investment and return

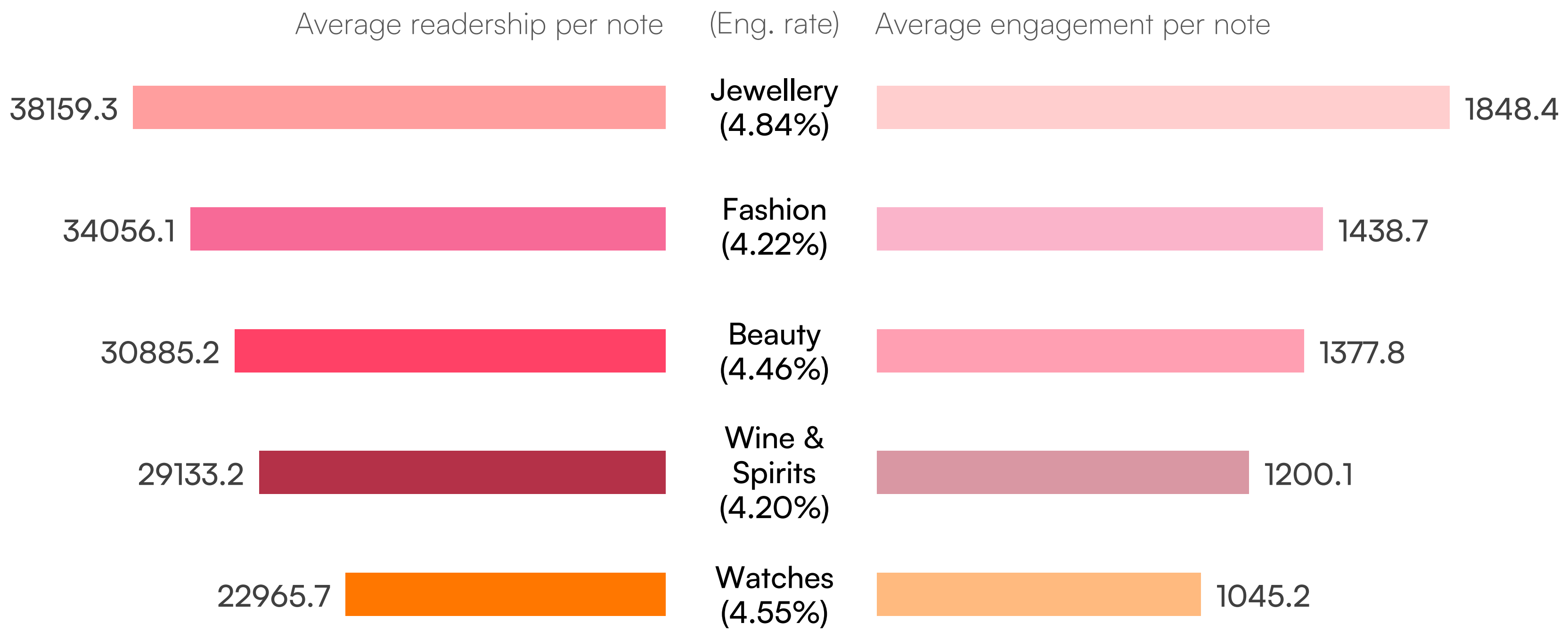
Investment in commercial notes varies dramatically across the luxury sector. The entire luxury landscape's paid volume is dwarfed by the Beauty industry's colossal output of over 61,000 notes, framing the luxury approach as more targeted and less reliant on saturation. Within this space, Fashion and Jewellery are the leading investors, indicating a significant paid media presence. In contrast, Watches and Wine & Spirits are far more conservative, with a smaller volume that suggests a highly selective, niche strategy.

Crucially, a higher return on investment is not correlated with a higher volume of posts. The data shows that Jewellery is the champion of efficiency, delivering the highest average readership and average engagement per post. Fashion follows as another strong, high-efficiency performer. This proves that on RedNote, success is not dependent on the scale of paid investment. A category like Jewellery can achieve superior per-post performance with less volume, highlighting the paramount importance of content quality and resonance.

AVG. COMMERCIAL NOTES PER BRAND



AVERAGE POST PERFORMANCE BY CATEGORY



Commercial Notes.

Commercial intensity

The luxury sector operates on a “less is more” principle on RedNote. Its paid content footprint is the smallest of any category (0.3% of volume) yet is incredibly potent, capturing a disproportionately larger 5.2% share of engagement. This selective strategy results in an exceptional 17.9x Impact Multiplier, proving luxury brands leverage their off-platform equity to create high-impact activations rather than aiming for mass-market saturation.

This high-leverage model is a consistent pattern for success across high-consideration industries on the platform. The Automotive sector employs an even more extreme version, achieving a massive 23.5x multiplier. Similarly, aspirational categories like Style & Trends (14.7x) and Finance (10.7x) show powerful results. This confirms the winning strategy for high-value goods is not competing on volume, but using targeted, resonant paid content to efficiently activate a passionate, niche audience.

Industry*	Automotive	Luxury samples	Style & Trends	Finance	Sports & Fitness	Celebrity & Entertainment	Art & Design
% post (Paid post VS. Organic posts)	0.5%	0.3%	2.9%	2.2%	4.4%	4.7%	1.3%
% engagement (Paid post VS. Organic posts)	11.8%	5.2%	42.4%	23.9%	25.0%	18.6%	3.8%
Impact multiplier**	23.5X	17.9X	14.7X	10.7X	5.7X	4.0X	3.0X

*Data for other Industries is sourced from industry tags defined by Xinhong. The benchmarks represent the typical performance across a wide range of relevant consumer categories on the RedNote platform.
**Impact Multiplier: Measures the efficiency of paid content by dividing its share of engagement by its share of volume.

Commercial Notes.

Content pillar

Looking at commercial notes, we can assess whether collaborations are still primarily product-focused, or if brands are instead tapping into wider narratives — such as jewellery brands linking with emotional or horoscope-driven topics, or watchmakers partnering around sports themes — to diversify their audience and enrich brand perception.

Fashion	Jewellery	Watches	Wine & Spirits
Shoes, Bags & Others 43.7%	Styling 72.3%	Styling 68.6%	Food & Beverage 77.0%
Styling 28.5%	Travel 4.1%	Travel 9.6%	Travel 10.6%
Travel 9.3%	Relationships & Zodiac 3.7%	Sports & Fitness 7.5%	Hobbies & Interests 4.2%
Beauty & Personal Care 3.3%	Entertainment 2.9%	Transportation 3.8%	Transportation 2.1%
Entertainment 3.0%	Wedding & Bridal 2.9%	Home & Decor 3.8%	Lifestyle 1.8%

Note: For luxury brands with a beauty division which is also communicated under a same account, commercial note data also covers beauty-related collaborations.

Influencer Marketing: Paid.

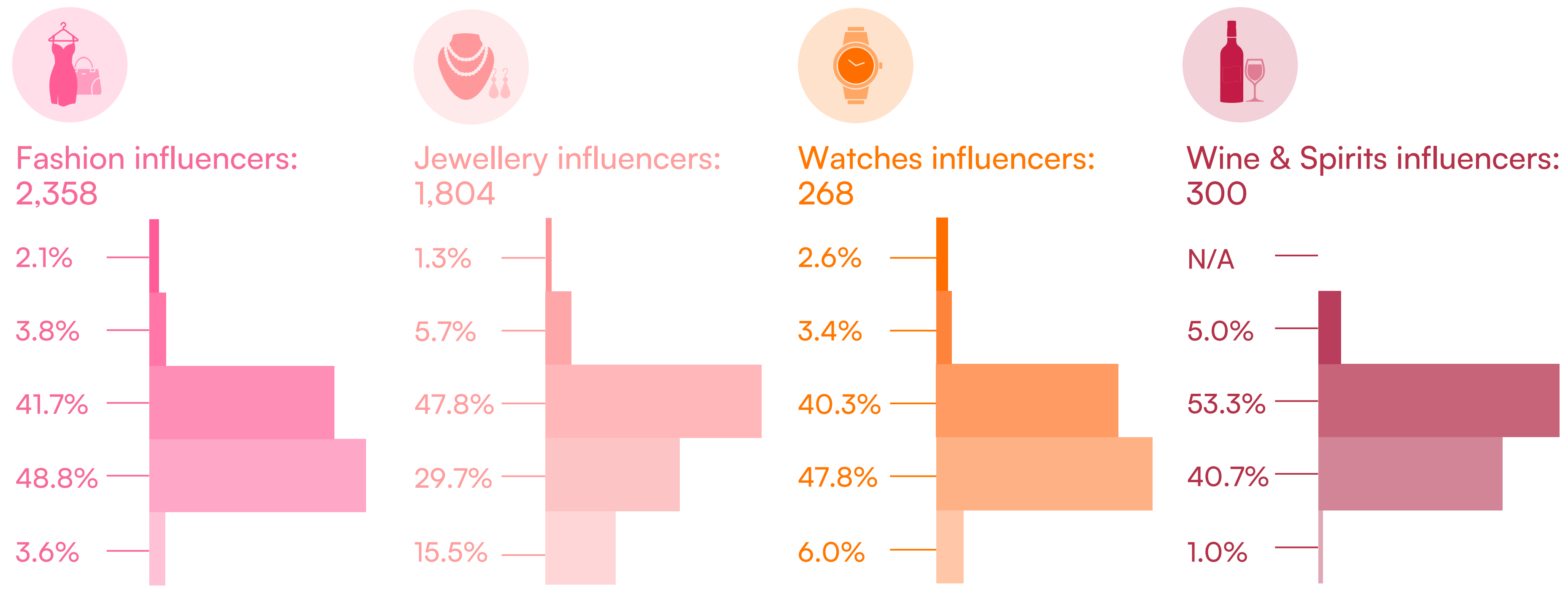
Influencer collaboration pool

Across the luxury sector, brands overwhelmingly concentrate their paid content investment in the middle of the influencer pyramid. In Fashion, Jewellery, and Watches, Mid-tier and Micro KOLs receive the vast majority of commercial collaborations (78% to 94%). This reveals a clear strategy that prioritises a "strategic sweet spot" blending professional content quality at a reasonable cost and perceived authenticity of a more niche following, making them highly efficient partners.

Whilst the mid-funnel focus is the norm, niche categories exhibit a more specialised approach. Wine & Spirits is the most targeted, with 94% of its collaborations focused exclusively on the middle tiers, reflecting its need for credible enthusiast voices to educate consumers. In contrast, Jewellery's relatively high investment in KOCs (15.5%) suggests a strategy that also values generating a higher volume of authentic-looking content to build broad-based desire, showing a sophisticated matching of influencer tier to category needs.

INFLUENCER TIERS BY FOLLOWER COUNT

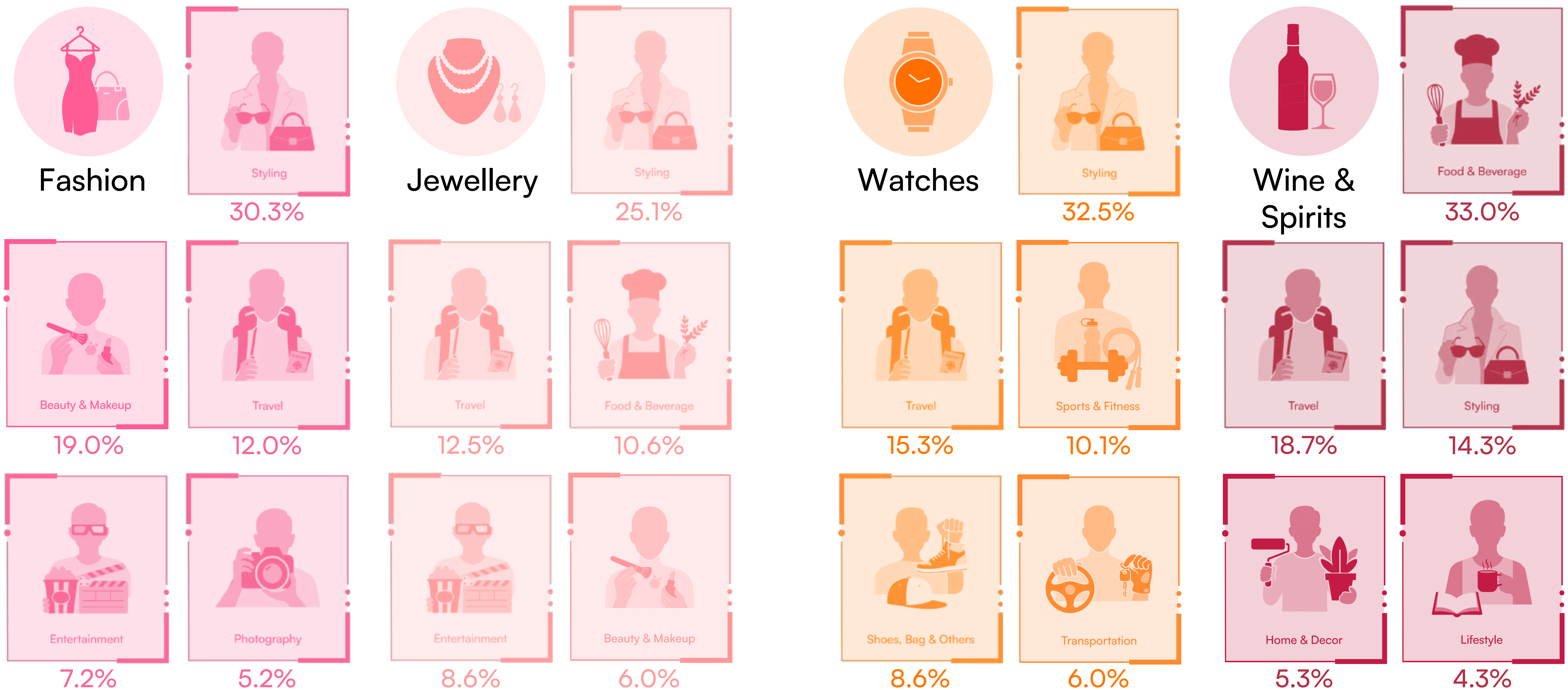
- Celebrities (verified on RedNote)
- Top KOLs: >500K followers
- Mid-tier KOLs: 50K - 500K followers
- Micro KOLs: 5K — 50K followers
- KOCs & Everyday consumers: <5k followers



Influencer Marketing: Paid.

Influencer types

When it comes to influencer types, we see much greater diversity. For the four major luxury categories, the share of category-specific influencers does not exceed 35%. Brands are increasingly collaborating with influencers from travel, photography and gastronomy, seeking fresh perspectives and creative storytelling.



Celebrities.

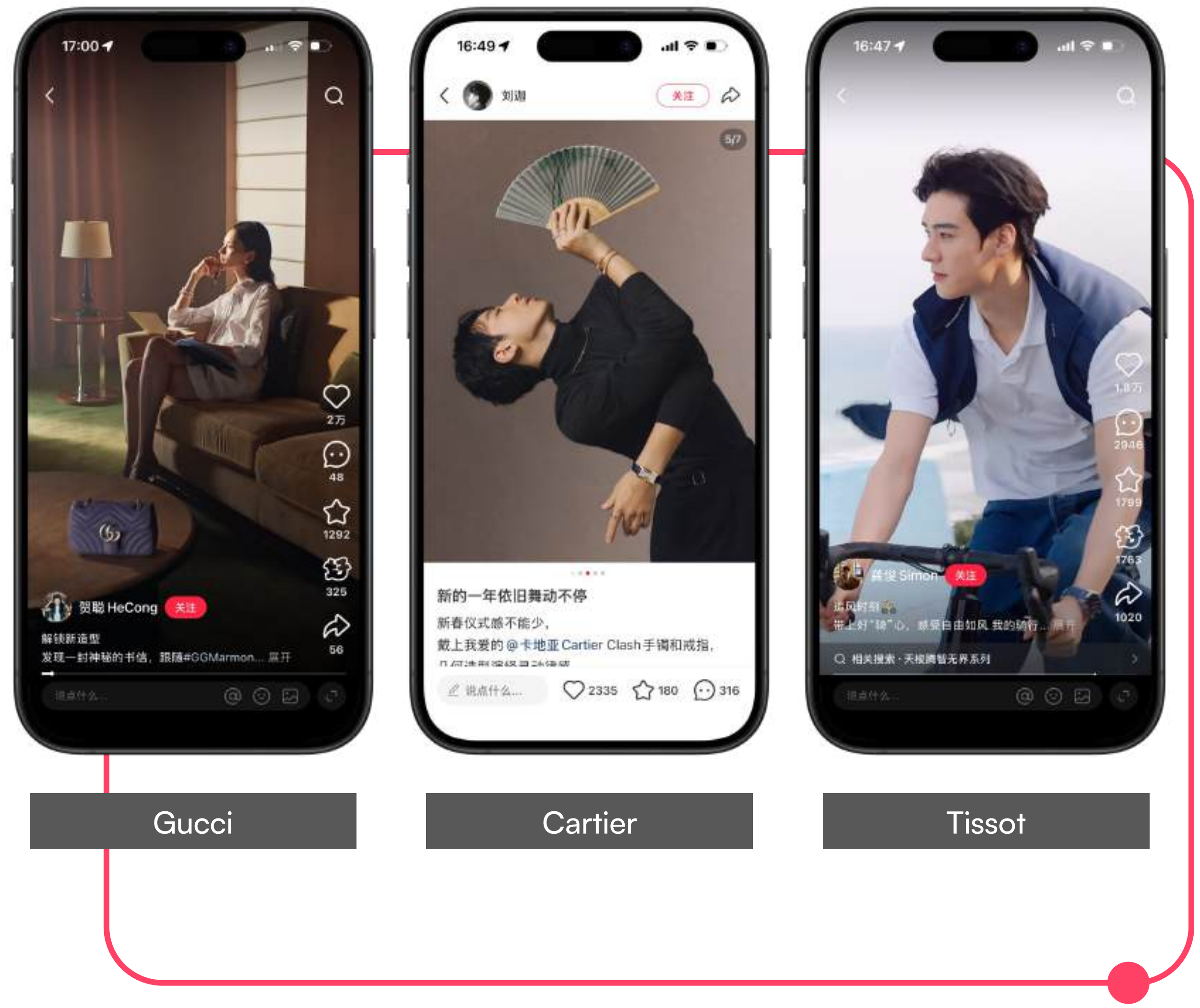
Overview

Unlike Weibo, RedNote's algorithm is less conducive to viral, fan-driven celebrity content, while stricter platform controls have also increased collaboration costs. Consequently, luxury brands typically showcase celebrity collaborations on their owned brand accounts rather than via personal channels. Although very few brands invest in celebrity commercial notes, these posts consistently deliver significantly above-average performance, proving their high impact when strategically deployed.

ADOPTION OF CELEBRITIES IN COMMERCIAL NOTES BY CATEGORY

Category	% of brands using celebrities	Avg. posts by brand
Fashion	17 brands (27.0%)	3.7
Jewellery	8 brands (36.4%)	3.3
Watches	3 brands (21.4%)	2.7
Wine & Spirits	0 brands (0%)	0

SPONSORED POSTS BY CELEBRITIES



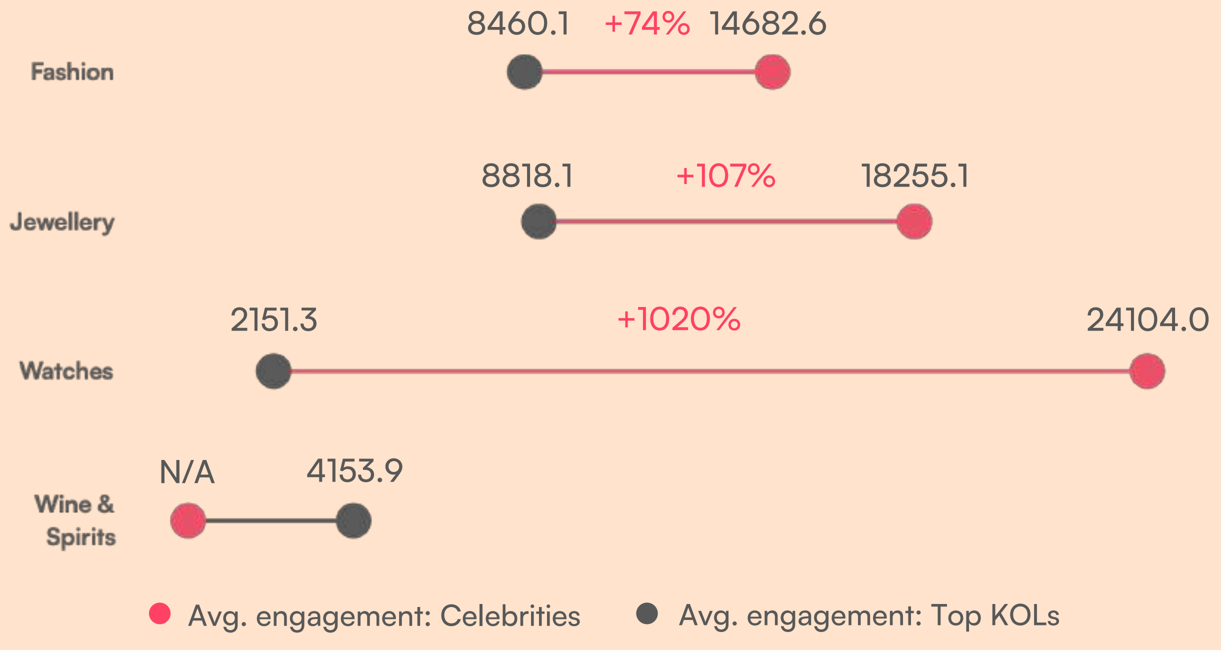
Celebrities.

Expertise & Fame

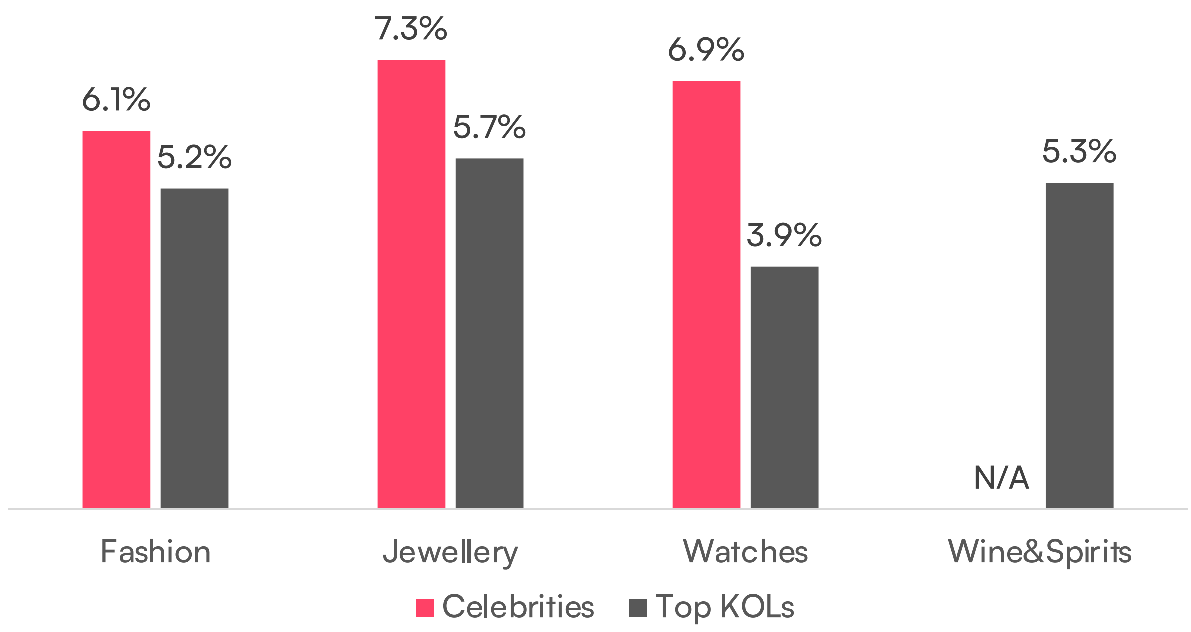
The broad appeal of celebrity "Fame" consistently and dramatically outperforms Top KOL "Expertise" in generating sheer engagement volume. In every luxury category, average engagement per celebrity is significantly higher, most notably in Watches (over 1,000% more engaging). This demonstrates that celebrity star power and mass-market reach act as powerful amplifiers, creating huge spikes in brand conversation and visibility that even respected specialists cannot match.

However, the engagement rate reveals a nuanced efficiency. While celebrities drive higher overall engagement, top KOLs often convert viewership into interaction with comparable efficiency. This is particularly noticeable in Fashion, where the engagement rate disparity is lower than Jewellery and Watches. This highlights a strategic choice: leverage celebrities for tentpole moments, while deploying Top KOLs to build credibility, educate, and drive high-quality consideration with a more discerning audience.

ENGAGEMENT PERFORMANCE: CELEBRITIES VS. TOP KOLS



ENGAGEMENT RATE: CELEBRITIES VS. TOP KOLS
(Average engagement / Average readership)

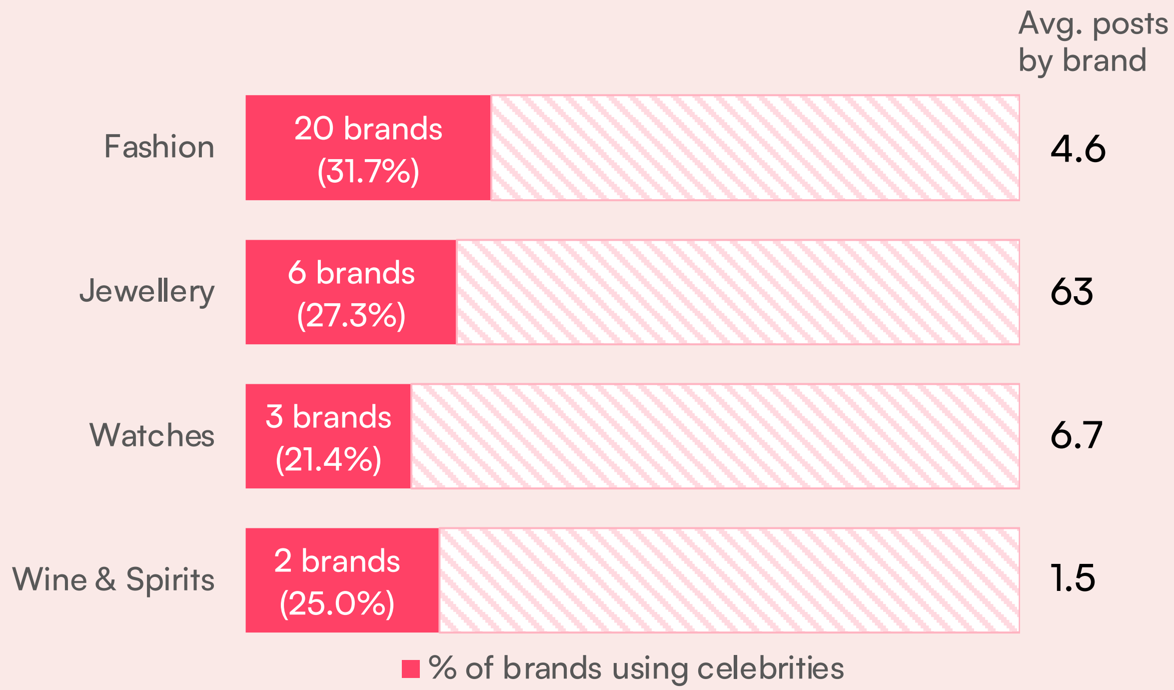


Key Opinion Consumers*.

Overview

Whilst over 90% of organic luxury buzz originates from everyday consumers, a strategic hesitation exists towards KOC collaborations. Only 29% of luxury brands collaborate with creators who have fewer than 5,000 followers, significantly lower than the 84% seen in Beauty. This reluctance stems from concerns over limited influence, inconsistent content quality, and brand tone alignment. Most brands engaging KOCs operate in the accessible luxury segment, such as Longchamp and Songmont.

ADOPTION OF KOCS IN COMMERCIAL NOTES BY CATEGORY



*Key opinion consumers (KOC) refers to all user accounts with fewer than 5,000 followers, excluding media and verified institutions.

HOW TO DISTINGUISH A SPONSORED KOC NOTE?

Paid KOC notes are designed to appear as authentic UGC to integrate seamlessly into user feeds. However, to ensure they drive brand awareness and are discoverable, they are typically characterised by the following elements:

Longchamp

- Visuals: Clear, high-quality images or videos with the product prominently displayed.
- Brand mentions: The brand name is clearly stated in the title or body, may including an “@” mention of the official account.
- Product naming: The specific product name or its common market “nickname” is used.
- Branded hashtags: The post includes official brand-owned or campaign-specific hashtags.

Key Opinion Consumers.

KOC performance

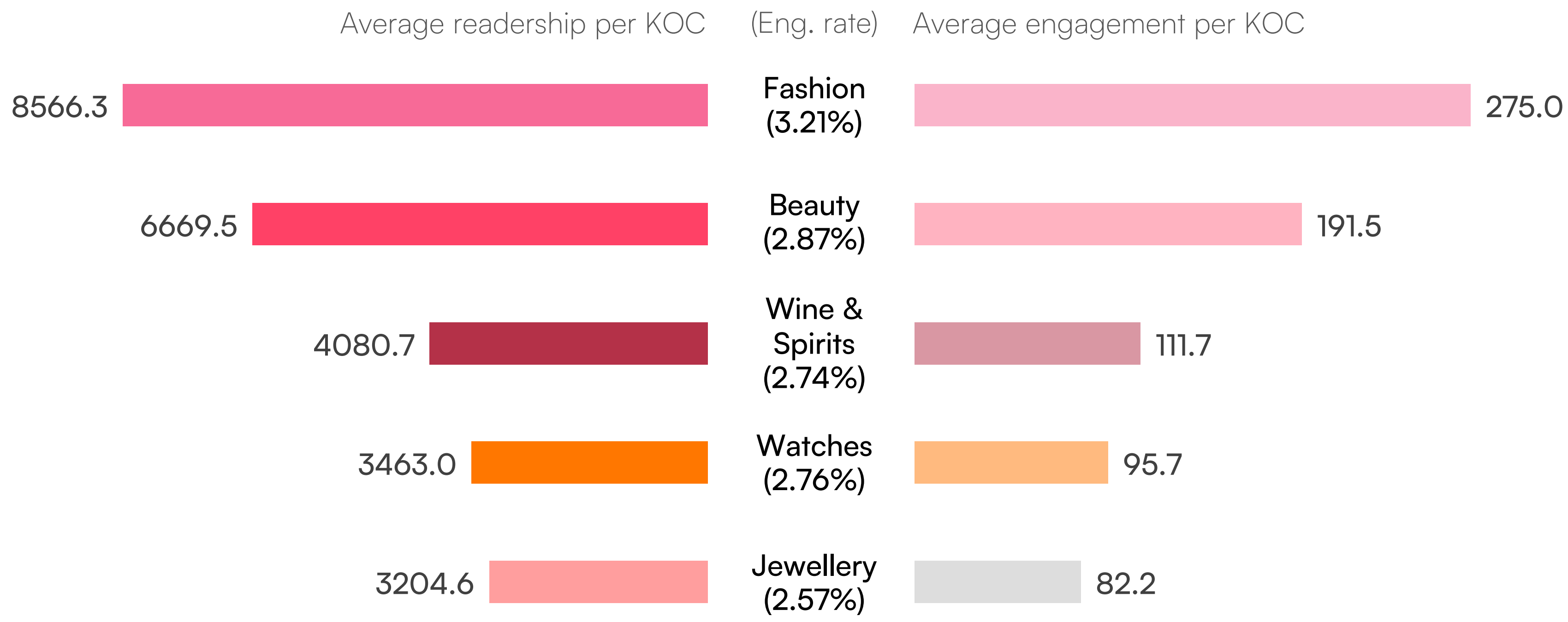
Within the luxury sector, KOC performance is clearly stratified, revealing how each category's nature aligns with the platform. Fashion KOCs are the undisputed leaders, delivering the highest average readership (8,566) and engagement (275) with a superior engagement rate (3.21%). This dominant performance stems from the category's perfect synergy with RedNote's visual, trend-driven ecosystem, where the core user behaviour of sharing new finds and personal style creates a constant stream of authentic content.

In contrast, the "hard luxury" categories of Watches and Jewellery show the lowest per-creator performance. This is not due to limited activation — Jewellery in particular often leverages KOCs — but rather the aspirational nature of these categories on RedNote. Content featuring high-value, long-purchase-cycle items tends to spark passive appreciation and "saving" for future goals, rather than the immediate, high-volume discussions seen in more accessible segments. The result is a quieter form of engagement.

FROM "PRODUCT SEEDING" TO "CULTURAL SEEDING"

Given that mass-seeding high-value items is impractical, the strategic role of the luxury KOC and small KOLs must shift from product-focused endorsement to communicating brand DNA pillars. Collaborating with influencers influential in fields like art, design, or business, brands can generate authentic content exploring themes of craftsmanship, cultural resonance, or heritage. This approach leverages their authenticity to tell a deeper brand story, achieving "cultural seeding" without distributing physical product.

AVERAGE KOC PERFORMANCE BY CATEGORY



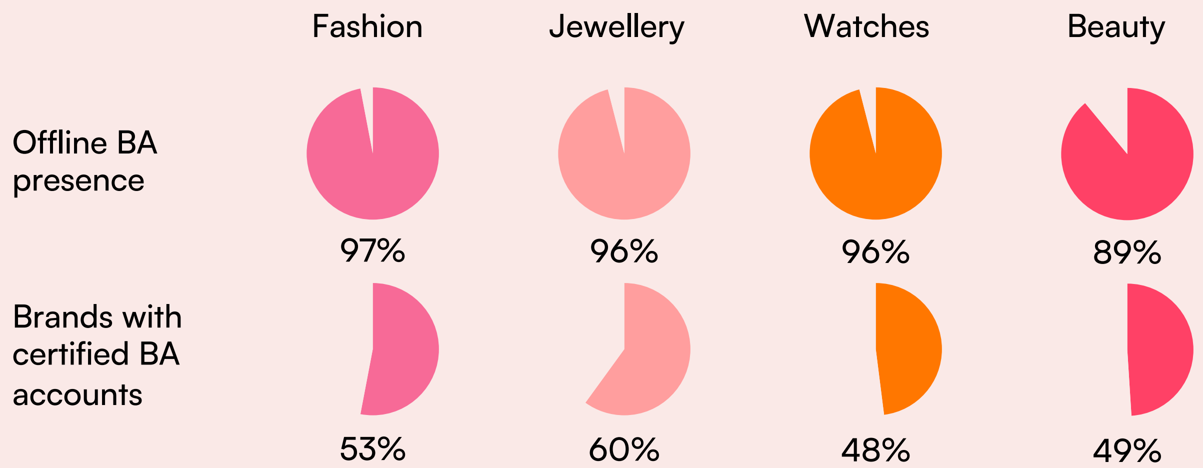
Key Opinion Sales.

Overview

It has become standard practice for luxury brands to have their offline BAs create accounts on RedNote. They allow them to communicate directly with local clients online and onboard them into private domain, such as WeChat or WeCom. Notably, the proportion of luxury brands adopting official sales certification surpasses the 49% seen in Beauty. This indicates that luxury brands recognise the impact these BAs have on their brand image and are favouring a more integrated, structured approach to their management.

FORMALISING KOS STRATEGY ON REDNOTE*

RedNote's official KOS tool lets brands link ambassadors' personal accounts to the main brand account, enabling performance tracking and official verification that builds consumer trust.



Due to the unique retail model of the Wine & Spirits category, the sales presence of its brands on RedNote is not included in this analysis.

Consumer journey	Actions	Objective
Awareness	**Post:** Showcase new collections, product details, and styling tips. **Engage:** Comment on relevant brand and product posts (KOLs, UGC) to increase visibility.	**Build credibility & Capture attention:** Position KOS as a trusted expert, capturing early discovery and building a follower base.
Interest	**Post:** Create content on unique product features or brand events to drive boutique visits. **Chat:** Answer direct messages for consultations.	**Build trust & Drive consideration:** Use professional credibility to ease hesitation and guide followers to exclusive experiences.
Purchase	**Post:** Highlight product availability for direct, high-value transactions. **Convert:** Drive followers to WeChat/WeCom for private appointments & personalised clienteling.	**Clienteling & Sales conversion:** Convert a public follower into a private client lead, providing personalised service and facilitating direct sales.
Share (Loyalty)	**Engage:** Interact with client posts featuring brand items to drive advocacy. **Chat:** Build client groups for exclusive previews & community management.	**Foster loyalty & Repeat business:** Turn one-time buyers into loyal members of the KOS community, encouraging repeat purchases and creating a self-sustaining advocacy loop.

04. Feeds

The feed is the core of every RedNote user experience — for reading, discussing, and sharing. Brand awareness generated through UGC serves as a true indicator of market heat and visibility.

4.1 Word-of-Mouth Notes 42

4.2 Influencer Marketing: Organic 47

4.3 Hashtag Marketing 49

Word-of-Mouth Notes.

Share of Voice*

The volume of word-of-mouth notes reflects a brand's share of voice on RedNote. Most of these notes, centred on the brand and its products, come directly from real customers or potential customers. They indicate the level and intensity of discussion around the brand on the platform. Unlike search volume, this type of UGC is often generated from post-purchase sharing and can also serve as a proxy for the brand's actual market share.

WHAT IS WORD-OF-MOUTH NOTE?

In this report, *word-of-mouth notes* (种草笔记) refer to any user-generated post on RedNote, as defined by Xinhong's own criteria, where the text (including title, body, or hashtags) features a brand or its product.

RANK	BRAND (ACCOUNT NAME)	CATEGORY	SOV
1	Louis Vuitton (路易威登)	Fashion	9.5%
2	Chanel (香奈儿CHANEL)	Fashion	8.4%
3	Hermès (HERMES)	Fashion	7.2%
4	Chow Tai Fook (周大福 CHOW TAI FOOK)	Jewellery	4.6%
5	Dior (DIOR迪奥)	Fashion	4.5%
6	Gucci (GUCCI)	Fashion	3.2%
7	Miu Miu (Miu Miu缪缪)	Fashion	2.9%
8	Rolex**	Watches	2.7%
9	Coach (Coach蔻驰)	Fashion	2.6%
10	Loewe (LOEWE罗意威)	Fashion	2.6%

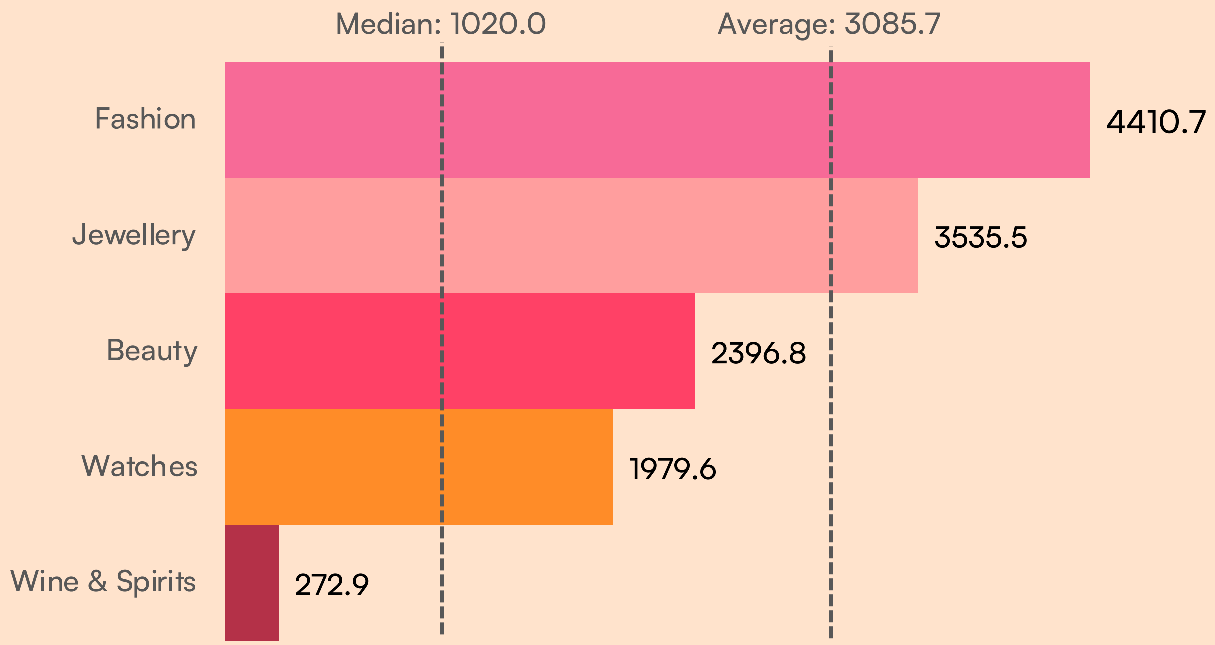
**Share of Voice: the proportion of brand- or category-related WOM notes out of all WOM notes*
***The brand doesn't have an official RedNote account.*

Word-of-Mouth Notes.

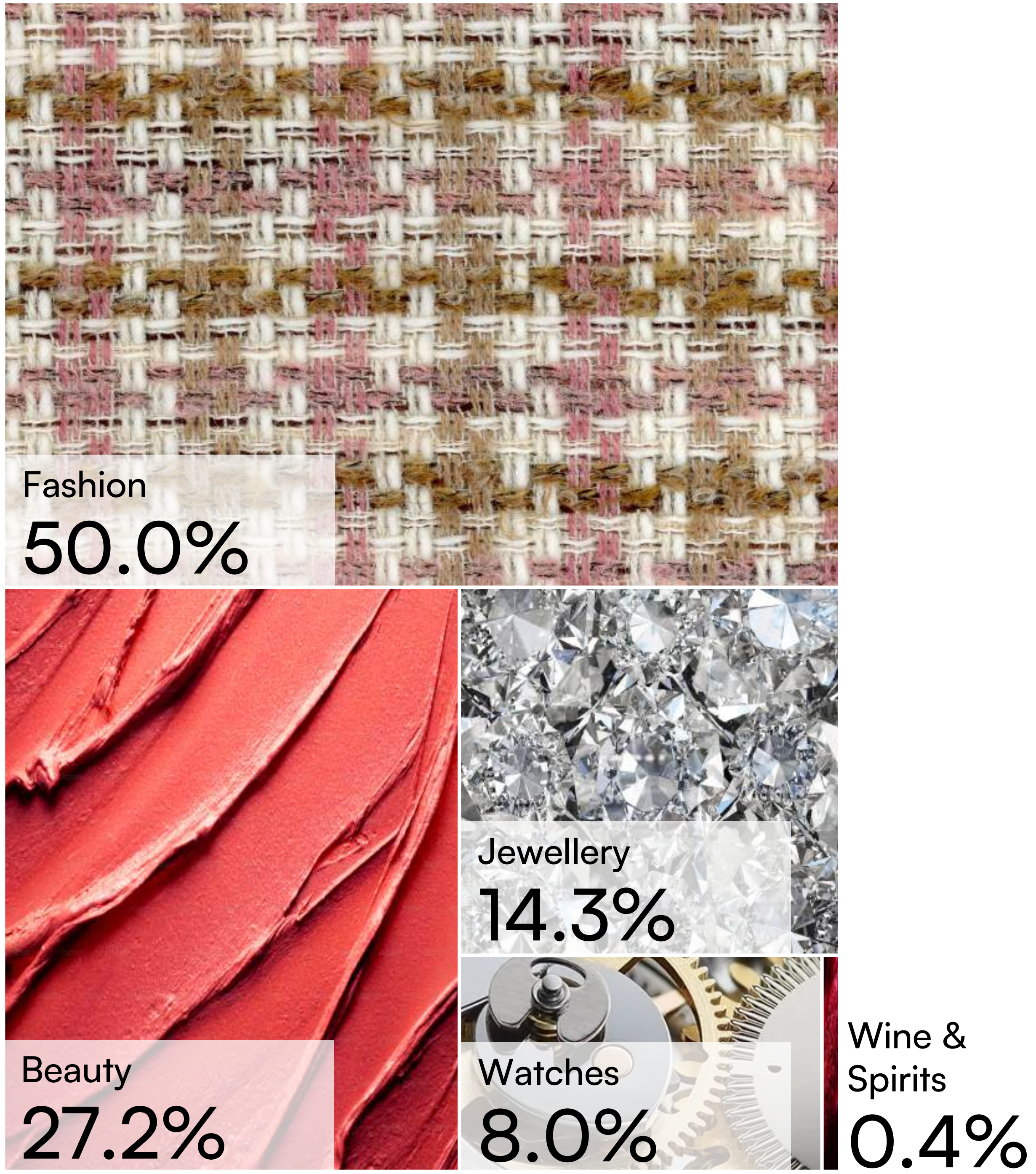
Share of Voice

Fashion overwhelmingly dominates the conversation on RedNote, capturing a full 50.0% of the Share of Voice with the highest average word-of-mouth note by brand. Jewellery and Watches form a significant secondary tier, with Jewellery showing more vibrant activity even beyond Beauty. Wine & Spirits remains a marginal niche category at just 0.4%, indicating limited UGC traction on the platform.

AVG. MONTHLY WORD-OF-MOUTH NOTE VOLUME PER BRAND



SHARE OF VOICE BY CATEGORY

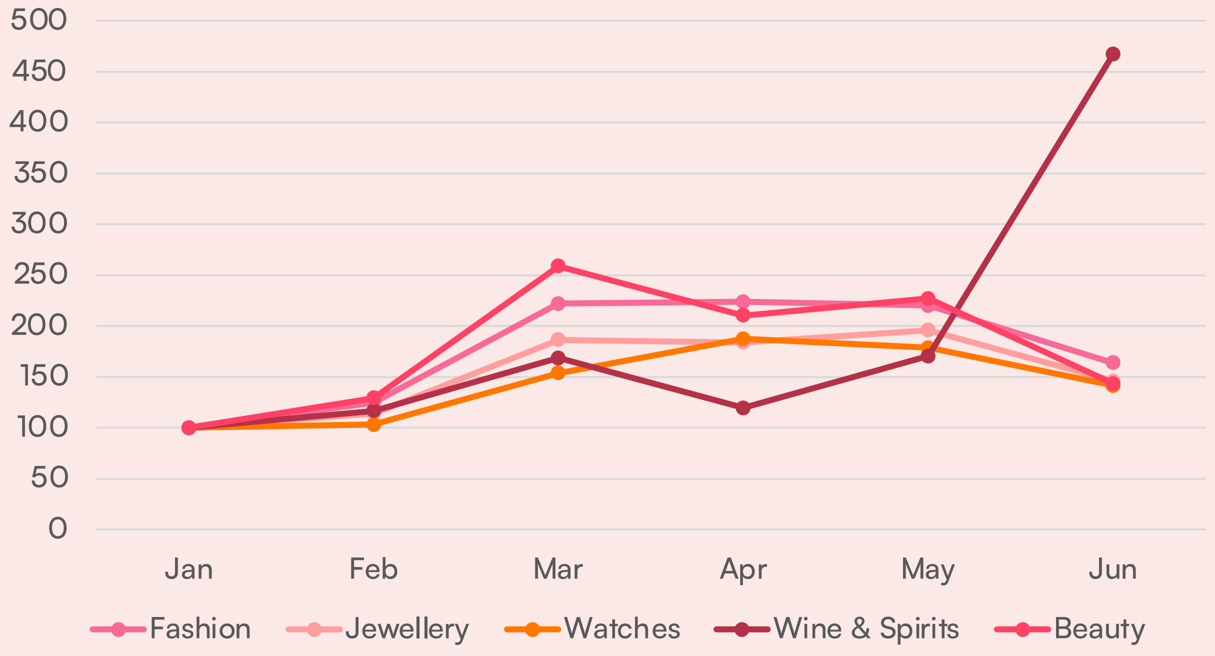


Word-of-Mouth Notes.

Monthly evolution

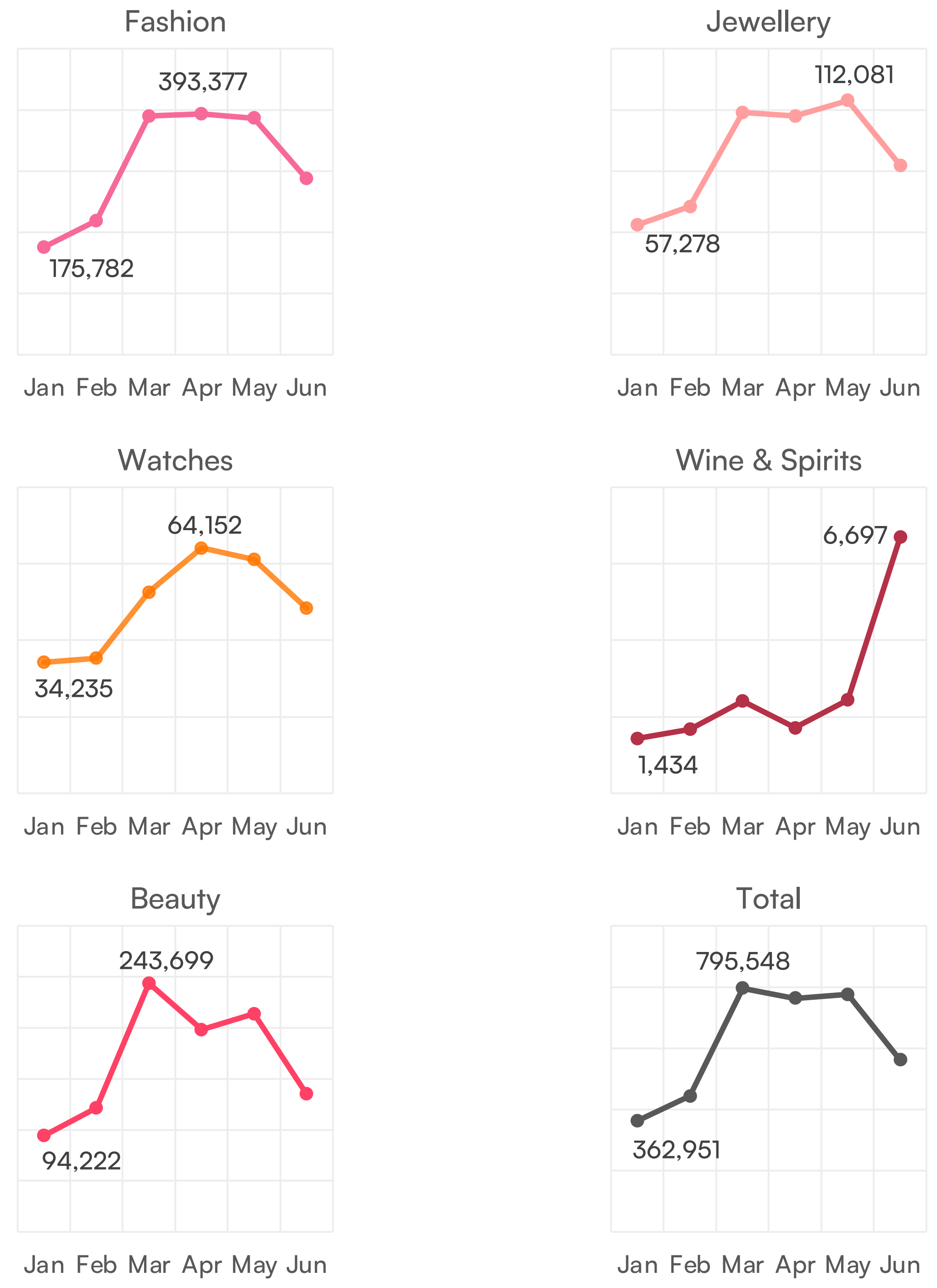
Following the quiet Lunar New Year period, luxury categories showed distinct growth trajectories. Wine & Spirits was the breakout star, with its growth index rocketing to nearly 500 by June, driven by a peak of discussion on The Macallan. Both Jewellery and Watches displayed robust growth, nearly doubling their January baseline, yet their paths differed. Jewellery saw a sharp, dramatic spike in March, while Watches followed a much steadier climb.

CATEGORY WOM NOTE GROWTH INDEX (JAN 2025 = 100)*



*The Category WOM Note Growth Index sets the month with the lowest volume (January 2025) as the baseline index of 100. All subsequent monthly values are calculated relative to this baseline to show the evolution of growth and momentum.

MONTHLY WOM NOTE BY CATEGORY



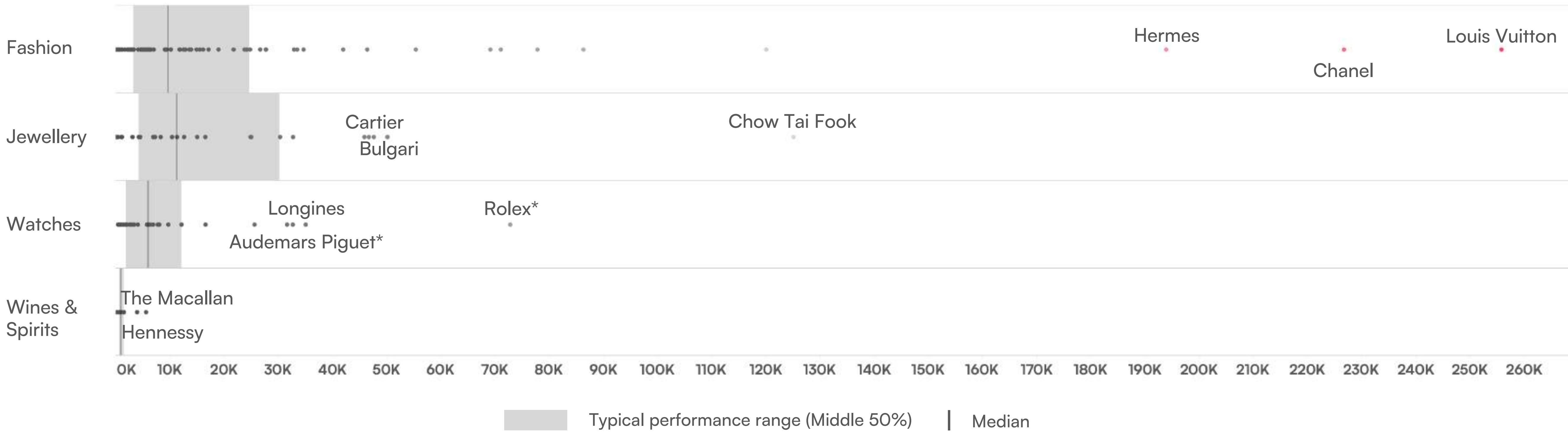
Word-of-Mouth Notes.

Brand performance

Fashion indisputably owns the pinnacle of discussion, with giants like Louis Vuitton, Chanel, and Hermès achieving outlier volumes that reflect their deeply entrenched status as ultimate symbols in China's luxury market. In Watches, the significant organic hype for Rolex and Audemars Piguet — brands even without an official RedNote presence — highlights their immense brand equity. However, this is also a major missed opportunity to directly engage and shape the conversation within their passionate community on this crucial platform.

This hierarchy proves that top-tier share of voice is tied to enduring brand equity, not fleeting campaigns. To build this long-term on RedNote, brands must focus on consistent cultivation rather than short-term advertising. This involves fostering authentic narratives around heritage and craftsmanship, delivering powerful products, and nurturing a genuine community of influencers and consumers. By doing so, brands can embed themselves into the platform's cultural fabric.

WORD-OF-MOUTH NOTE VOLUME BY BRAND



*Brand don't have an official RedNote account.

Word-of-Mouth Notes.

Content pillar

By analysing word-of-mouth notes, we gain insight into how people talk about luxury brands and from which angles. These posts are created not only by KOLs but also by everyday consumers, media outlets and brands themselves. Their distribution provides valuable input for optimising both owned content strategies and paid collaboration approaches.

Fashion

- Shoes, Bags & Others 55.4%
- Styling 27.4%
- Travel 5.9%
- Entertainment 2.4%
- Home & Decor 1.9%

Jewellery

- Styling 75.4%
- Travel 5.6%
- Information & News 3.4%
- Home & Decor 3.2%
- Shoes, Bags & Others 3.2%

Watches

- Styling 80.0%
- Home & Decor 5.3%
- Shoes, Bags & Others 4.0%
- Travel 3.5%
- Entertainment 2.2%

Wine & Spirits

- Food & Beverage 78.4%
- Travel 6.4%
- Technology 3.1%
- Home & Decor 2.5%
- Hobbies & Interests 1.3%

Influencer Marketing: Organic.

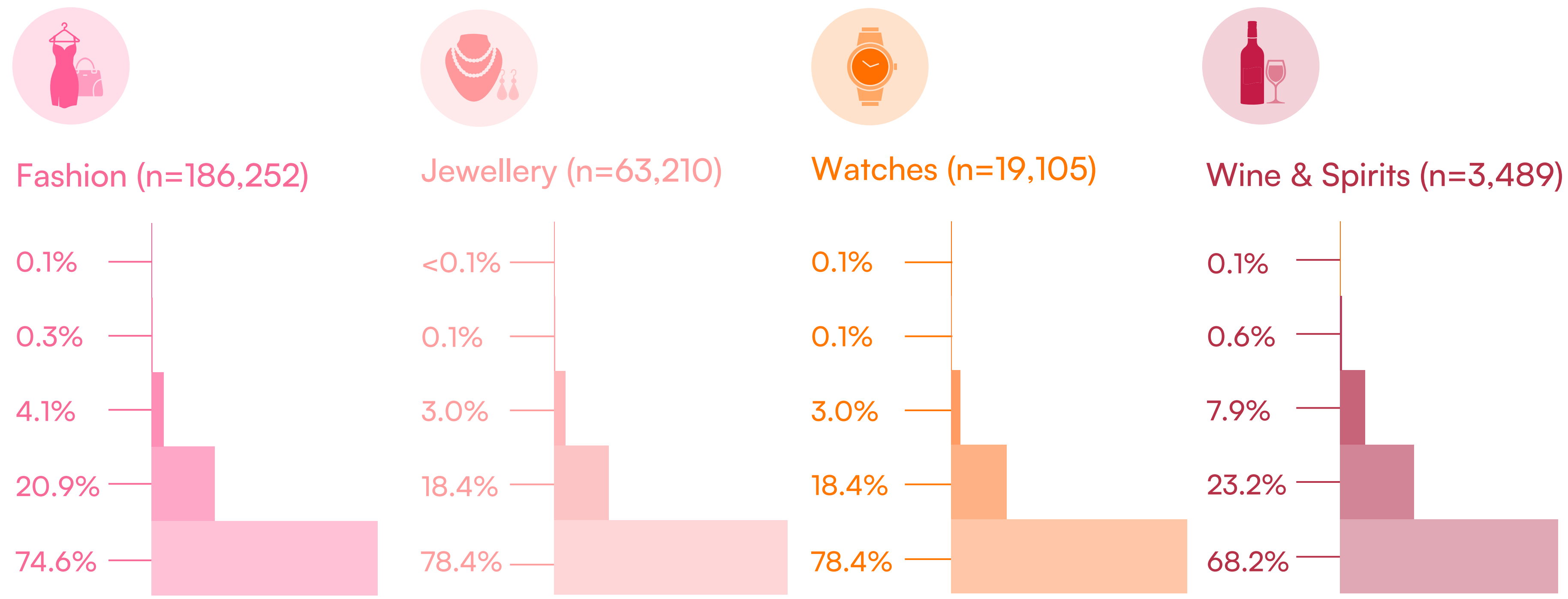
Influencer distribution by tier

The creator base for organic luxury discussion is overwhelmingly composed of KOCs and everyday consumers (<5K followers), who represent 70-80% of all users posting about these categories. This grassroots structure is most pronounced in Fashion and Jewellery. In contrast, Wine & Spirits has a slightly higher proportion of Micro KOLs in its creator pool, suggesting its organic conversation is shaped more by niche enthusiasts.

A stark contrast emerges when comparing the creator tiers. While the organic discussion is driven by a massive KOC base, brands' paid collaborations are heavily concentrated on Mid-tier and Micro KOLs. This reveals a clear strategy: leveraging KOCs for authentic reach while investing in mid-funnel creators who balance professional content with strong engagement. Top-tier KOLs and celebrities remain a small fraction of the paid landscape, reserved for major campaign amplification rather than sustained community building.

INFLUENCER TIERS BY FOLLOWER COUNT

- Celebrities (verified on RedNote)
- Top KOLs: >500K followers
- Mid-tier KOLs: 50K - 500K followers
- Micro KOLs: 5K — 50K followers
- KOCs & Everyday consumers: <5k followers



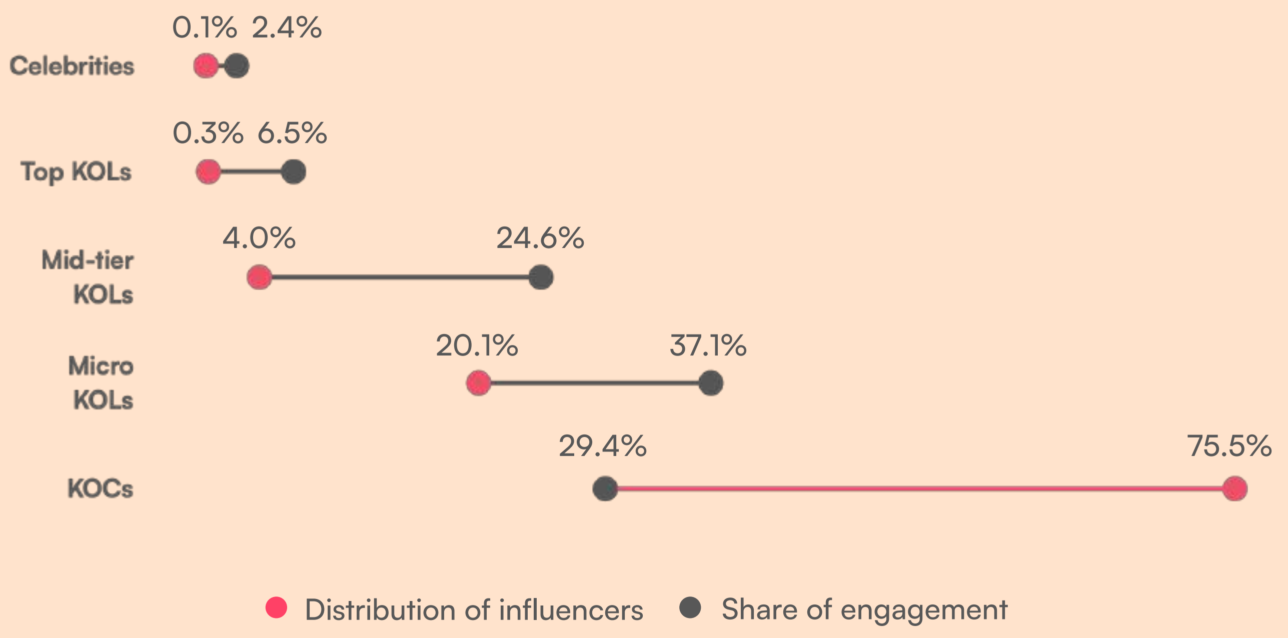
Influencer Marketing: Organic.

Influencer efficiency

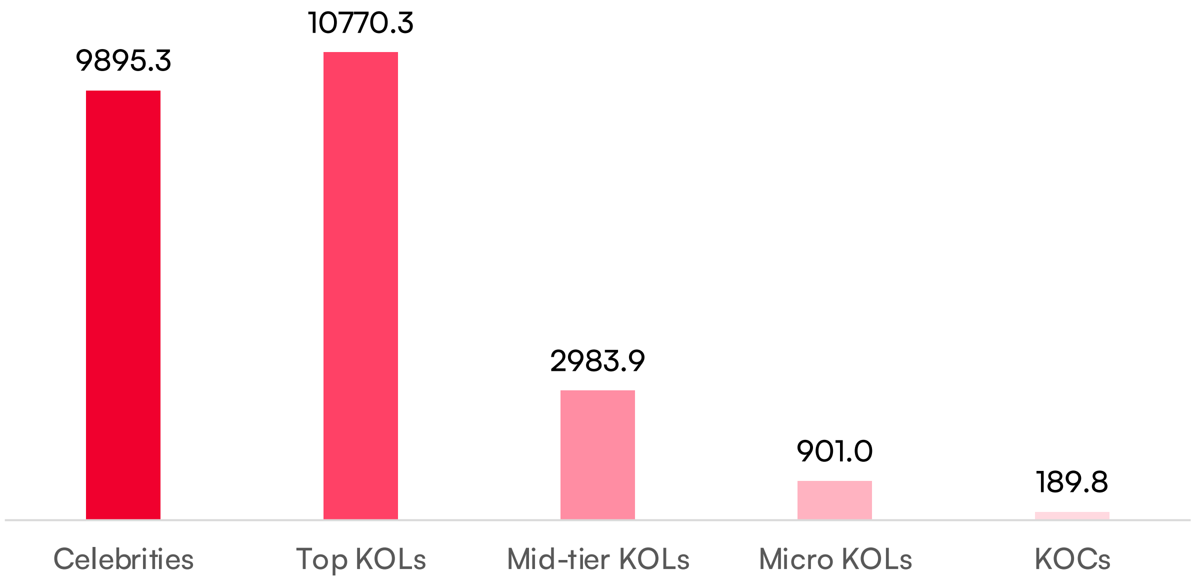
A significant disparity exists between influencer presence and the engagement they generate. While KOCs and Micro KOLs form the vast majority of creators (over 95%), their share of engagement is disproportionately small. Conversely, the elite group of Mid-tier to Celebrity KOLs, representing less than 5% of users, drives 34% of the total engagement. This highlights a clear hierarchy where a small, influential core commands the conversation's impact.

The efficiency index reveals Top KOLs are the most potent engagement drivers per creator. However, a successful RedNote strategy cannot ignore the grassroots foundation; the volume and authenticity of KOCs and Micro KOLs are crucial for credibility. Therefore, luxury brands should adopt a dual-pronged approach: collaborate with top-tier KOLs for high-impact "tentpole" moments, while simultaneously empowering the broader KOC and Micro KOL community through seeding programs to build a sustainable, authentic brand presence.

THE DISPARITY BETWEEN INFLUENCER PRESENCE AND IMPACT



INFLUENCER EFFICIENCY INDEX
(Average engagement per influencer by tier)



Hashtag Marketing.

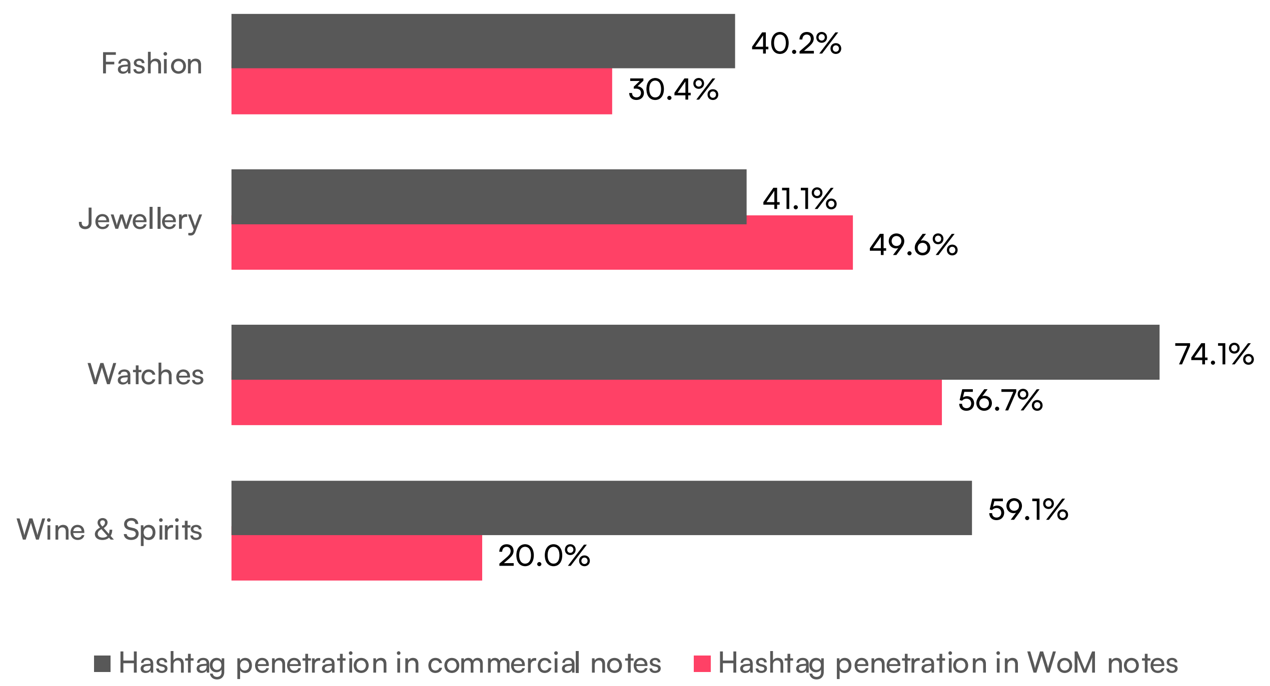
Overview

On RedNote, brand-owned hashtags are critical strategic assets, transforming simple brand names into searchable digital ecosystems. For users, leveraging these hashtags in their content validates status, showcases taste, and fosters belonging within an aspirational community. This user adoption is invaluable: it creates a powerful, evergreen archive of authentic social proof, directly boosting brand visibility in search results and feeds. This is the core mechanism for organic discovery and peer-driven seeding on the platform.

There's a significant disparity in hashtag usage between paid and organic content. While commercial collaborations ensure hashtag inclusion, driving organic adoption requires inspiration, not enforcement. Brands must create compelling hashtags that offer genuine utility or a strong sense of community. The ultimate goal is to build a brand narrative so desirable that users actively leverage the hashtag, thereby boosting the discoverability of their posts and ensuring broader exposure within their peers' feeds.

Keyword type	Example	Marketing objective
Brand	Brand name *(e.g., #欧米茄 OMEGA)*	Ensure brand visibility in search and feeds and reinforces authority in peer-driven discussions
	Brand value (e.g., #拉夫劳伦美好生活DNA)	Embed lifestyle narratives that resonate with consumers seeking identity alignment
	Evergreen content (e.g., #圣罗兰星选)	Sustain long-tail discovery by anchoring the brand in recurring consumer needs and interests
Product	Category or collection *(e.g.,#ZEGNASUMMER26)*	Promote a thematic range while fostering a shared space for consumers to exchange experiences
	Specific product *(e.g.,#LVExpress)*	Spotlights hero items and drives UGC around ownership, usage, and peer validation.
Campaign	Milestone activation *(e.g., #卡地亚节日挚礼)*	Rallies UGC participation during cultural or brand moments, amplifying buzz through community storytelling
	Brand event (e.g., #LoroPiana百年一触)	

BRAND HASHTAG USAGE IN PAID VS. ORGANIC CONTENT

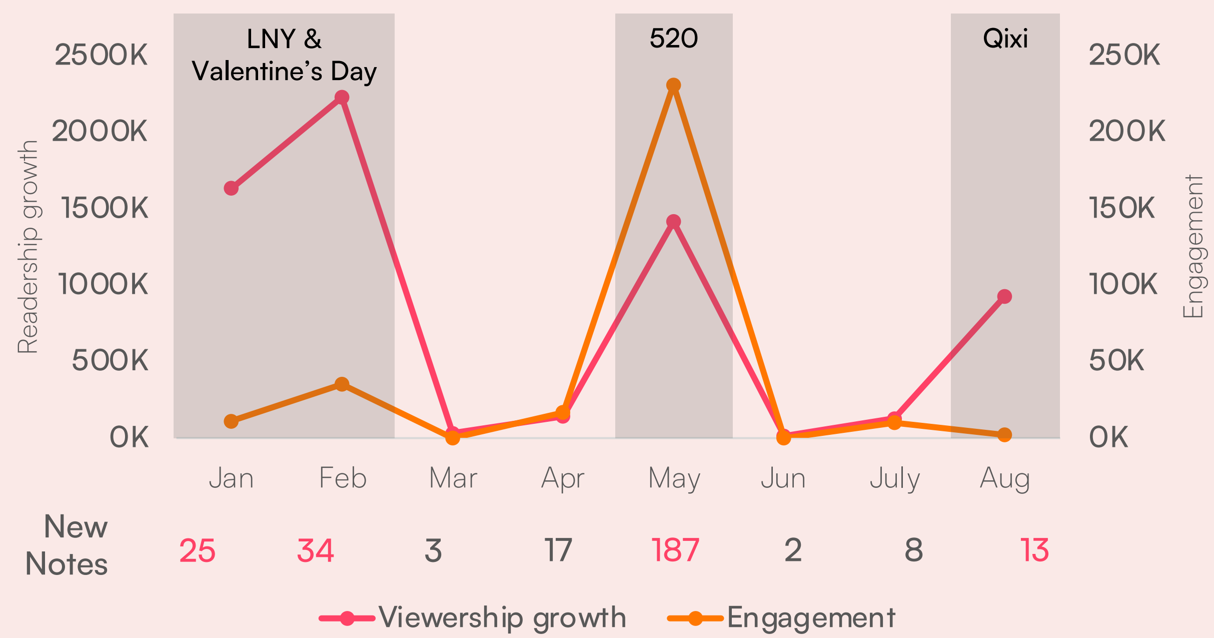


Hashtag Marketing.

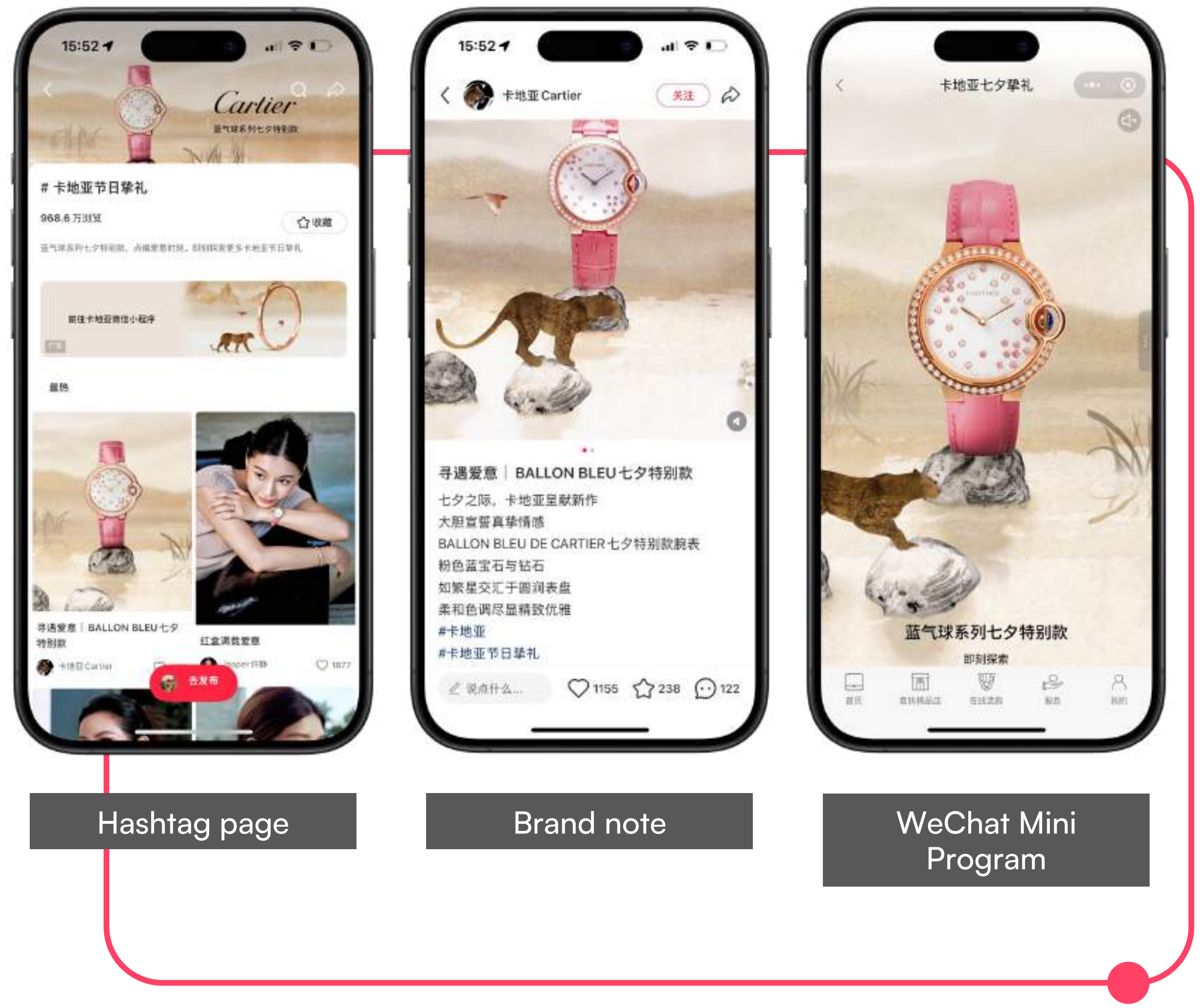
Case study: Cartier

During key local milestones, Cartier consistently activates its evergreen hashtag #卡地亚节日挚礼 (Cartier Festival Gifting). This curated hashtag page not only highlights branded and influencer content, but also features a customised cover and advertising support that links directly to its WeChat Mini Program for purchase. For this year's Qixi, the hashtag spotlighted a special edition of the Ballon Bleu watch exclusively released for Qixi.

HASHTAG PAGE PERFORMANCE (JAN-AUG)
#卡地亚节日挚礼 (Cartier Festival Gifting)



BALLON BLEU QIXI LIMITED EDITION LAUNCH



05. Search

RedNote functions not only as a social platform but also as a search engine. Search trends reveal how sought-after your brand is in China — and what consumers are thinking about you.

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Why Search Matters.

Searching on RedNote has become a critical part of the Chinese consumer's online journey. It serves as a key touchpoint for both pre-purchase decisions and post-purchase advice. As the platform's search ecosystem continues to mature, a brand's exposure is no longer limited to passively appearing in search results. By leveraging Brand Zones, Hot Search Terms, and SEO, brands can now proactively enhance and reinforce their presence in user search behaviour.

A GLIMPSE ON SEARCH OF REDNOTE*

600M+ RedNote Daily QV

1B+ Baidu Daily QV

170M Monthly users seeking purchase advice

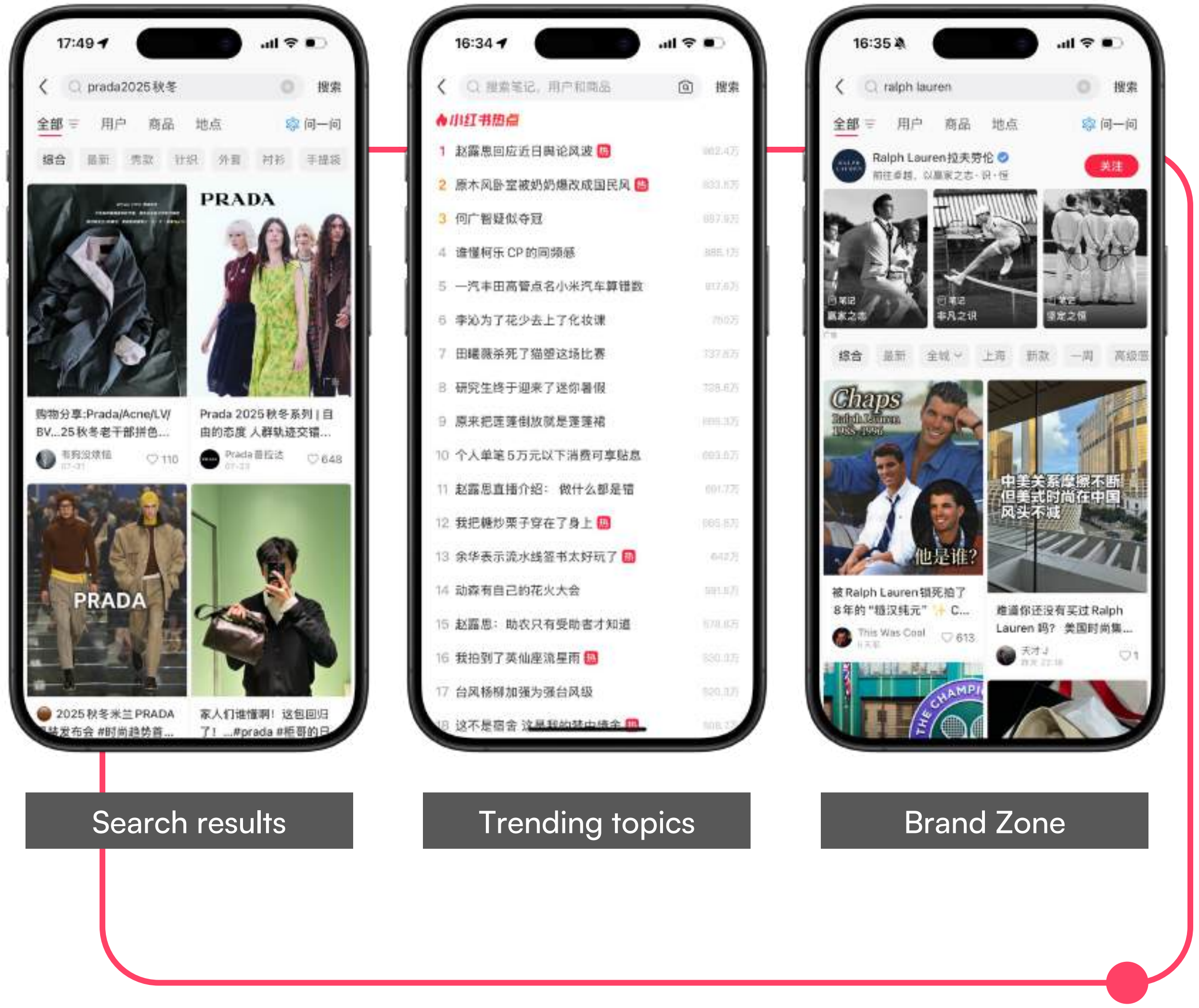
70% Daily active users using search

90% Active search share

42% New users using search on Day 1

*Source: RedNote Data Platform and industry analysis; refers to the entire RedNote ecosystem, not limited to the luxury industry.

HARNESSING SEARCH FOR BRAND PRESENCE



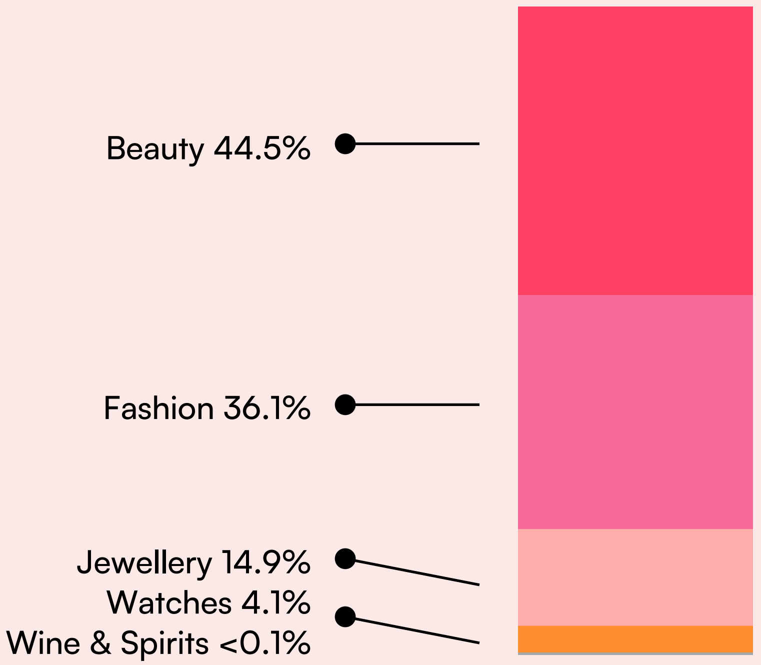
Brand Trends.

Search volume by category

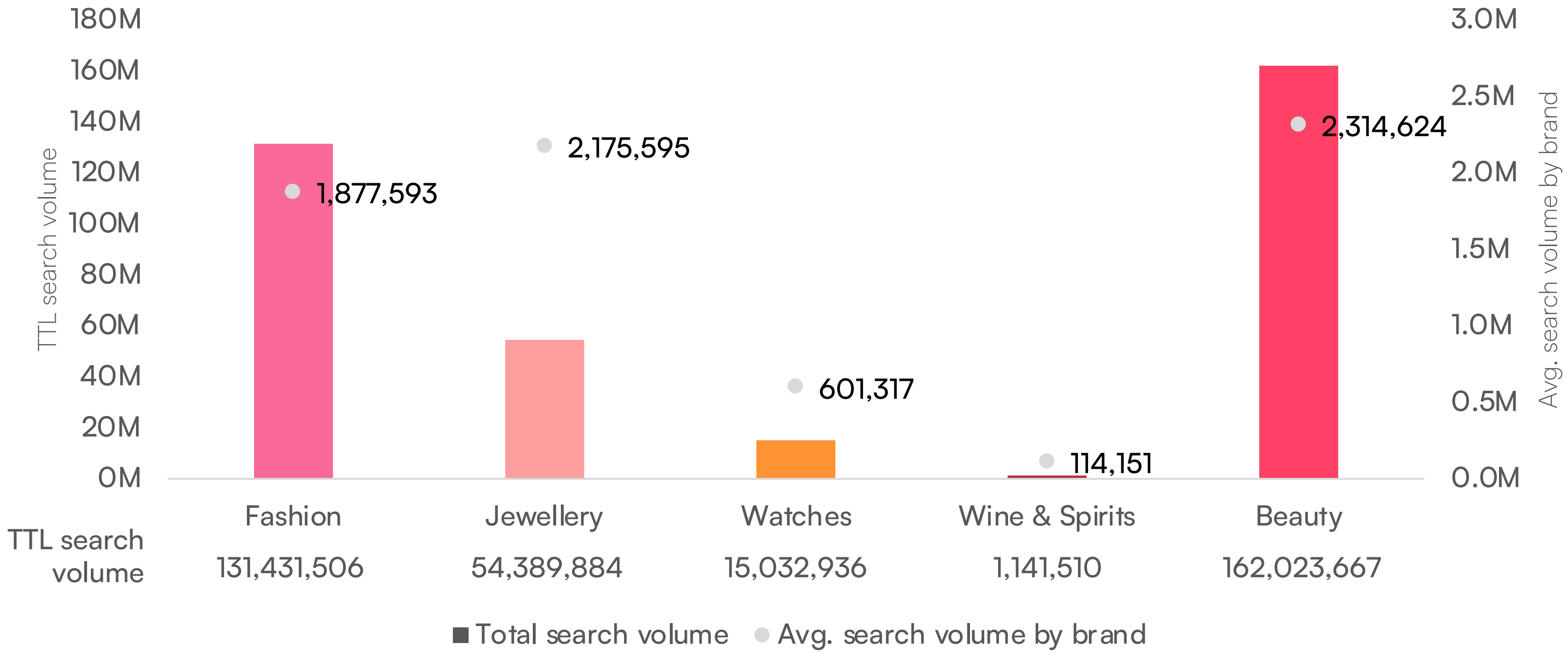
The search volume data on RedNote reveals a compelling hierarchy of consumer interest across luxury categories. Contrary to the raw volume, Jewellery emerges as the most sought-after category, with a remarkable average of 2.18 million searches per brand. This significantly outpaces Fashion, which, despite its large number of brands, has a per-brand average of 1.88 million. Watches and Wine & Spirits have a considerably lower average, suggesting a more niche, less-frequent search behavior among their brand-specific audiences.

The high per-brand search volume for Jewellery underscores its premium value and the high level of intent from users, who are highly motivated to search for specific brands within a smaller, concentrated market. This contrasts with Fashion, where the high total volume is distributed across a much larger number of brands.

DISTRIBUTION OF SEARCH VOLUME



LEVEL OF SEARCH VOLUME BY CATEGORY



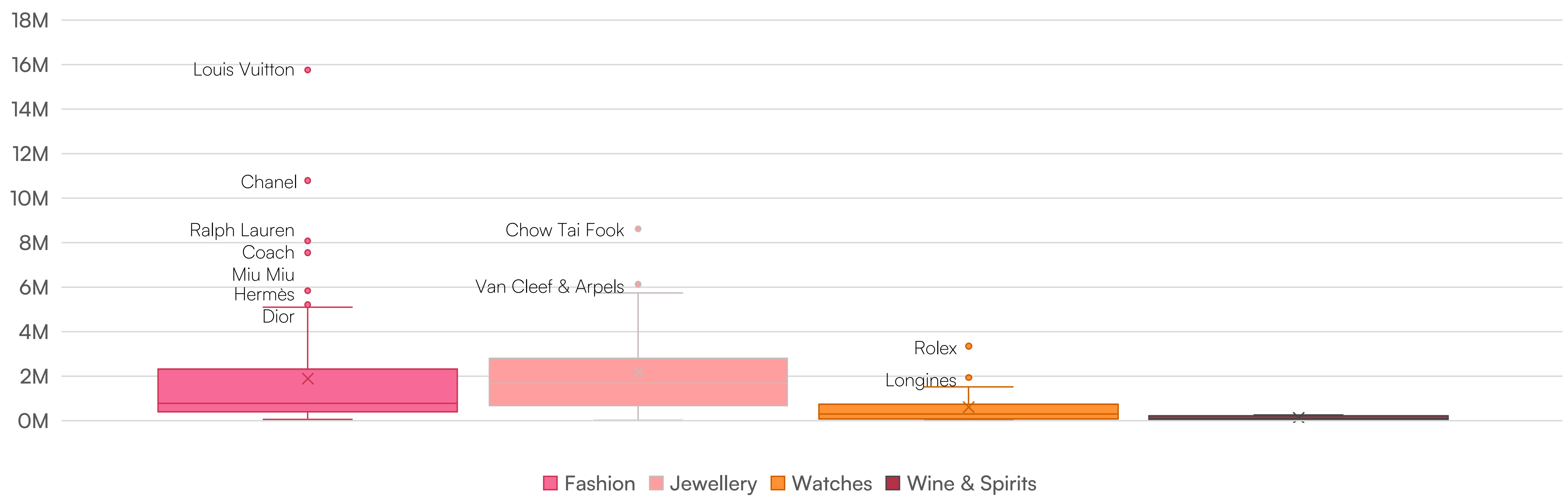
Brand Trends.

Search volume by brand

On RedNote, search volume is a direct reflection of a brand's desirability and mindshare. This data reveals that while outliers drive massive conversation, the typical brand's engagement is more modest. Jewellery leads all categories with a median search volume of approximately 1.7M, followed by Fashion at 0.8M. In contrast, Watches and Wine & Spirits show a more concentrated range and lower medians, suggesting that their niche positioning makes it challenging to compete with the top maisons.

The most telling observations come from the outliers: Louis Vuitton (~16M) and Chanel (~11M) exist in a tier of their own, their immense search volumes confirming a dominant market leadership that has evolved into a cultural phenomenon. Furthermore, the prominence of rising stars like Coach and Miu Miu coincides with their buzz of becoming highly sought-after brands. Jewellery leaders like Chow Tai Fook and Van Cleef & Arpels, perfectly mirrors market trends and underscores their powerful desirability in China.

SEARCH VOLUME DISTRIBUTION BY BRAND



Note: The line within the box represents the median; the 'X' symbol indicates the average

Keyword Trends.

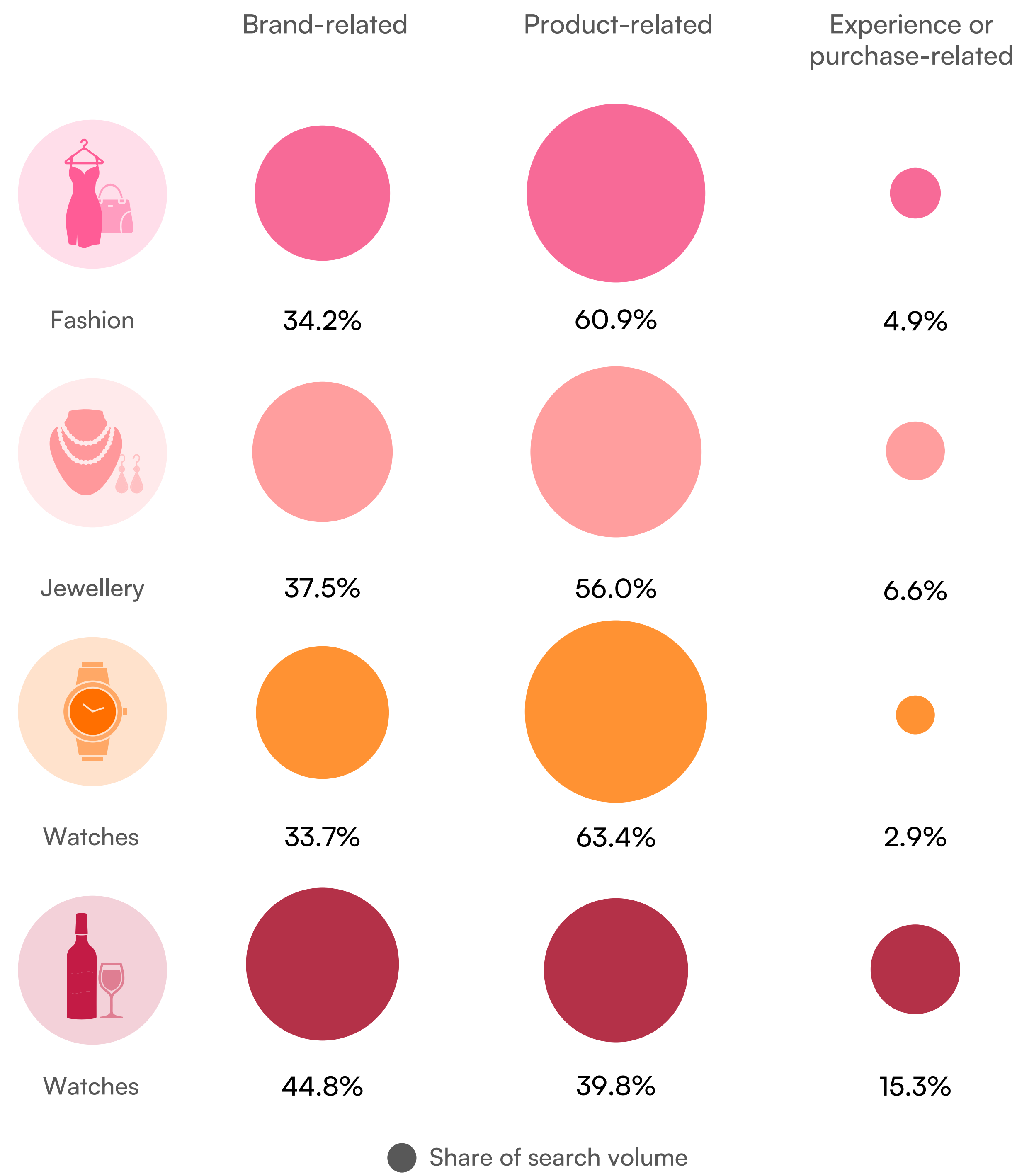
Keyword types

Search keywords offer a clear window into the consumer's journey, indicating their level of brand familiarity and purchase intent. By analysing the top 10 keywords related to our brand pool, we've uncovered how market penetration and consumer desirability vary significantly among different luxury segments.

TYPES OF KEYWORDS

Keyword type		Search intent
Brand-related	Brand name *(e.g., 香奈儿)*	Users are unfamiliar with the brand and seek information on its story, consumer feedback, and offerings.
	Brand image-related (e.g., loropiana是什么牌子)	Users have an initial awareness of the brand and want to learn more or compare it with similar brands.
	Social buzz, celebrity, or marketing related *(e.g., 岩中花述)*	Users have been exposed to marketing activities or brand news and are motivated to explore further.
Product-related	Specific product name or item number *(e.g., 积家约会)*	Users have a clear purchase intent and product knowledge, researching specific details before buying.
	Generic category *(e.g., 周大福手镯)*	Users have a purchase intent but no clear target, and are exploring or comparing brand offerings.
Experience or purchase-related	Price, service, usage, advice, etc. *(e.g., 加拿大鹅清洗)*	Users are seeking recommendations, advice, or feedback, both pre-sale and after-sale.

DISTRIBUTION OF SEARCH VOLUME BY KEYWORD TYPE



Keyword Trends.

Consumer behaviour

A deeper analysis of keywords — including their language, product mentions, and semantics — allows us to gauge not only user demand for specific products and brands but also the market penetration of different categories in China. In terms of localization, Watches and Jewellery demonstrate a high level of consumer recognition, with 87.8% and 77.2% of search volume, respectively, including the brand's Chinese name. In contrast, this figure is only 46.6% for Fashion.

Additionally, 7.3% of keywords relate to brand value. Users frequently compare different brands or discuss their perceived status to aid their purchasing decisions. This indicates that brands associated with these keywords may have an ambiguous market positioning. 19 of the most-searched keywords containing brand names include typos (e.g., 百达斐丽), old translations (e.g., 蒙口), or nicknames (e.g., 萝卜丁). Brands should consider these factors in their marketing and advertising investments, as these terms still rank highly.

Luxury

1/3

Brand-led searches

A third of search volume comes from brand name-only keywords, illustrating users are the early stage of brand exploration.

Luxury

20

Product searches

Only 20 brands have achieved to establish iconic products that translate into top 10 search terms *(e.g.,carryall)*, demonstrating strong product power and mature consumer perception.

Fashion

55%

Category-led searches

55% of fashion brand search volume is driven by category-related keywords, suggesting consumers often have unclear purchase goals and are still exploring and comparing.

Watches

88%

Chinese brand name

Nearly 90% of watches' search volume originates from keywords including Chinese brand name, demonstrating a high level of localisation in this category.

Brand Zone.

Overview

A Brand Zone is a paid advertising feature on RedNote that allows brands to own a curated section on the search results page for keywords that include their name. Its CTAs can direct users to a variety of destinations, including brand profiles, specific notes, hashtag pages, livestreams, or even external links like Tmall and WeChat Mini Programs.

When implemented effectively, it can significantly boost account awareness and follower recruitment. For luxury brands aiming to build a strong owned presence, the Brand Zone is a valuable tactic for promoting campaigns and products, utilised by 51.5% of the brands in our research*.

HOW A BRAND ZONE AMPLIFIES GROWTH**

Daily account impressions **31x**

Daily profile views **6.8x**

Daily follower growth **10.8x**

Tiffany & Co.

- **Focus:** Campaign-led
- **Campaign:** Qixi Festival campaign
- **Featured Products:** HardWear Collection
- **Destinations:** Brand-posted videos, hashtag page, brand profile

Prada

- **Focus:** Campaign-led
- **Campaign:** Qixi Festival campaign
- **Featured Products:** Explore Shoulder Bag
- **Destinations:** Brand-posted image & text notes, brand profile

** The data was collected from 27 June to 4 July and may not be representative of brands' current situation.*
***Source: RedNote Data Platform and industry analysis; refers to the entire RedNote ecosystem, not limited to the luxury industry.*

Brand Zone.

Case study: Hermès

Offline events have become a critical lever for brands to boost UGC on social media and, in turn, drive their share of voice. This strategy allows consumers to discuss the brand without needing to make a purchase. For its "Hermès in the Making" event in Shenzhen, Hermès effectively utilised a Brand Zone to promote the exhibition. This digital hub featured a brand-owned hashtag page and also directed users to a WeChat Mini Program to reserve their visit seamlessly.

HASHTAG PAGE PERFORMANCE (11 MAY - 11 JUNE) #爱马仕匠心工坊深圳

280K Total Views

337 Total Contributors

211 Total Notes

11K Total Engagements

BRAND ACCOUNT PERFORMANCE (11 MAY - 11 JUNE)

3,813 New Followers

19K Total Engagements

HERMÈS IN THE MAKING IN SHENZHEN

Brand Zone

Hashtag page

CTA to Mini Program

06. RISE Index

The RISE Index — RedNote Influence & Strategy Evaluation — is created to serve as a clear benchmark for luxury brands in China's dynamic social media landscape, measuring their visibility, consumer resonance, and market vitality.

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Methodology.

Voice

Capturing how brands leverage their official accounts to build influence, looking at activity levels, audience engagement, and the strength of community growth

- FAN BASE
- FAN BASE GROWTH
- POSTING FREQUENCY
- ENGAGEMENT VOLUME
- MILESTONE ACTIVATION

KOL Investment

Evaluating how effectively brands deploy paid content, considering both the scale of investment and the impact of influencer partnerships in terms of reach and engagement

- COMMERCIAL NOTE VOLUME
- COMMERCIAL NOTE READERSHIP
- COMMERCIAL NOTE ENGAGEMENT

Heat

Reflecting the intensity of organic consumer interest, measuring demand, brand visibility, and the potential for viral amplification

- SEARCH VOLUME
- WORD-OF-MOUTH NOTE VOLUME
- WOM NOTE ENGAGMENT

DLG | 新榜 | 新红

RISE Index: Voice.

Capturing how brands leverage their official accounts to build influence

Rank	Brand (Account name)	Category	Fan base	Growth Index (Adj.)	Posting Frequency	Engagement	Milestone Activation	Brand Score
1	Dior (DIOR迪奥)		78.0	12.0	100.0	58.1	100.0	69.6
2	Qeelin (Qeelin麒麟)		16.3	100.0	61.1	85.7	50.7	62.8
3	Chopard (Chopard萧邦)		13.5	31.9	100.0	55.3	100.0	60.1
4	Longchamp (珑骧Longchamp)		35.7	37.4	87.3	45.8	94.1	60.1
5	Bulgari (BVLGARI宝格丽)		28.9	18.8	78.5	60.7	95.9	56.6
6	Louis Vuitton (路易威登)		100.0	25.2	26.3	100.0	29.6	56.2
7	Armani (ARMANI阿玛尼)		8.2	40.9	84.2	59.7	72.4	53.1
8	Gucci (GUCCI)		63.5	14.9	55.9	81.1	48.9	52.9
9	Loewe (LOEWE罗意威)		30.7	39.3	62.1	59.9	68.8	52.2
10	Tod's (TODS)		16.5	27.4	60.6	92.6	60.9	51.6
11	Boucheron (Boucheron宝诗龙)		9.2	28.5	63.4	66.5	83.3	50.2
12	Max Mara (MaxMara)		20.5	58.3	53.0	64.8	52.5	49.8
13	Songmont (Songmont山下有松)		38.0	53.2	50.7	52.5	48.9	48.6

RISE Index: Voice.

Capturing how brands leverage their official accounts to build influence

Rank	Brand (Account name)	Category	Fan base	Growth Index (Adj.)	Posting Frequency	Engagement	Milestone Activation	Brand Score
14	Boss (BOSS博斯)		3.2	37.5	71.7	50.4	68.8	46.3
15	Stuart Weitzman (StuartWeitzman思缇韦曼)		9.4	39.1	62.1	52.0	68.8	46.3
16	Hublot (HUBLOT宇舶表)		15.6	34.6	61.9	60.0	57.3	45.9
17	Christian Louboutin (ChristianLouboutin路铂廷)		8.5	46.1	46.5	61.8	64.0	45.4
18	Tiffany & Co. (Tiffany蒂芙尼)		43.9	25.5	50.9	59.4	44.0	44.8
19	Chaumet (CHAUMET尚美巴黎)		16.5	32.5	47.8	70.0	54.9	44.3
20	Tudor (TUDOR帝舵)		7.3	100.0	28.3	56.3	29.0	44.2
21	APM Monaco (APM Monaco)		23.1	24.9	59.5	52.0	56.7	43.2
22	Rado (RADO雷达表)		3.9	94.4	22.1	68.1	27.1	43.1
23	De Beers (De Beers戴比尔斯)		11.0	29.3	56.7	63.0	51.9	42.4
24	Marc Jacobs (MARC JACOBS)		4.9	37.7	49.4	41.0	76.6	41.9
25	Fendi (FENDI)		26.1	33.9	36.4	59.6	51.3	41.4
26	Celine (CELINE 思琳)		31.8	35.8	47.8	51.6	38.6	41.1

RISE Index: Voice.

Capturing how brands leverage their official accounts to build influence

Rank	Brand (Account name)	Category	Fan base	Growth Index (Adj.)	Posting Frequency	Engagement	Milestone Activation	Brand Score
27	Tory Burch (TORY BURCH汤丽柏琦)		28.2	32.1	36.1	72.9	36.2	41.1
28	Bottega Veneta (Bottega Veneta)		12.1	28.0	61.1	53.0	51.3	41.1
29	Ferragamo (FERRAGAMO菲拉格慕)		11.8	46.6	49.6	47.0	48.3	40.6
30	Omega (欧米茄OMEGA)		13.3	21.7	41.8	43.7	82.7	40.6
31	Chow Tai Fook (周大福 CHOW TAI FOOK)		53.6	18.7	33.3	51.8	44.0	40.3
32	Zegna (杰尼亚Zegna)		5.6	44.7	45.2	49.6	55.5	40.1
33	Michael Kors (MICHAEL KORS迈克高仕)		25.5	44.2	28.8	70.3	29.0	39.6
34	Coach (Coach蔻驰)		24.0	38.7	36.6	60.4	38.0	39.5
35	Longines (浪琴表)		14.6	30.0	44.2	59.3	49.5	39.5
36	Balenciaga (Balenciaga)		12.9	24.8	60.0	44.5	54.9	39.4
37	Burberry (Burberry)		21.6	18.9	49.6	51.2	55.5	39.4
38	Ralph Lauren (Ralph Lauren拉夫劳伦)		16.5	38.5	54.6	44.3	42.8	39.3
39	Van Cleef & Arpels (VanCleefArpels梵克雅宝)		27.4	29.1	47.3	47.1	44.6	39.1
40	Loro Piana (LoroPiana 诺悠翩雅)		8.3	58.4	47.6	36.3	42.2	38.6

RISE Index: KOL Investment.

Evaluating how effectively brands deploy paid content

Rank	Brand (Account name)	Category	Commercial Note Volume	Readership / Commercial Note	Engagement / Commercial Note	Brand Score
1	Tissot (瑞士天梭表Tissot)		1.3	100.0	100.0	67.1
2	Graff (GRAFF格拉夫)		3.3	95.0	88.2	62.2
3	De Beers (De Beers戴比尔斯)		13.0	70.8	82.9	55.6
4	Chow Tai Fook (周大福 CHOW TAI FOOK)		100.0	26.8	26.1	51.0
5	Tasaki (TASAKI塔思琦)		1.5	77.2	60.0	46.2
6	Vacheron Constantin (江诗丹顿Vacheron Constantin)		0.3	71.7	56.4	42.8
7	Songmont (Songmont山下有松)		31.2	43.5	43.9	39.5
8	Bulgari (BVLGARI宝格丽)		100.0	4.3	2.7	35.6
9	Longchamp (珑骧Longchamp)		65.2	20.7	13.8	33.2
10	Pandora (PANDORA潘多拉珠宝)		49.9	25.4	20.0	31.7
11	Chaumet (CHAUMET尚美巴黎)		90.6	2.7	1.4	31.5
12	Max Mara (MaxMara)		45.8	24.0	20.6	30.1
13	Pomellato (Pomellato宝曼兰朵)		5.4	41.5	39.9	28.9

RISE Index: KOL Investment.

Evaluating how effectively brands deploy paid content

Rank	Brand (Account name)	Category	Commercial Note Volume	Readership / Commercial Note	Engagement / Commercial Note	Brand Score
14	Dolce&Gabbana (Dolce&Gabbana)		76.5	5.4	2.8	28.2
15	Versace (VERSACE范思哲)		15.3	35.6	31.7	27.5
16	Coach (Coach蔻驰)		44.5	22.0	15.7	27.4
17	Prada (Prada普拉达)		23.0	31.4	27.5	27.3
18	Loewe (LOEWE罗意威)		73.7	5.1	2.9	27.2
19	APM Monaco (APM Monaco)		36.3	25.6	18.7	26.9
20	Gucci (GUCCI)		12.0	33.7	30.3	25.4
21	Dior (DIOR迪奥)		29.7	24.9	17.3	24.0
22	Lacoste (LACOSTE)		24.0	26.3	20.6	23.6
23	Chow Sang Sang (周生生)		37.3	18.6	13.2	23.0
24	Michael Kors (MICHAEL KORS迈克高仕)		37.6	13.6	12.4	21.2
25	Johnnie Walker (尊尼获加 Johnnie Walker)		18.2	22.4	22.3	21.0
26	Zegna (杰尼亚Zegna)		2.6	27.1	31.8	20.5

RISE Index: KOL Investment.

Evaluating how effectively brands deploy paid content

Rank	Brand (Account name)	Category	Commercial Note Volume	Readership / Commercial Note	Engagement / Commercial Note	Brand Score
27	Tory Burch (TORY BURCH汤丽柏琦)		15.1	25.3	20.6	20.3
28	Cartier (卡地亚Cartier)		31.0	18.0	11.3	20.1
29	Louis Vuitton (路易威登)		3.8	31.2	22.6	19.2
30	Glenfiddich (格兰菲迪 Glenfiddich)		37.1	11.8	6.8	18.6
31	Tod’s (TODS)		3.6	28.5	20.4	17.5
32	Burberry (Burberry)		4.3	21.3	26.0	17.2
33	Damiani (DAMIANI)		2.8	20.8	27.6	17.1
34	Chanel (香奈儿CHANEL)		0.3	28.6	22.0	17.0
35	Harry Winston (Harry Winston海瑞温斯顿)		2.8	27.2	19.4	16.5
36	Ferragamo (FERRAGAMO菲拉格慕)		28.1	12.9	8.0	16.4
37	Piaget (伯爵PIAGET)		3.6	25.8	18.5	16.0
38	Saint Laurent (SAINTLAURENT圣罗兰)		2.8	26.0	18.9	15.9
39	Givenchy (GIVENCHY纪梵希)		0.3	25.7	19.7	15.2
40	Moncler (Moncler盟可睐)		2.3	24.7	17.9	15.0

RISE Index: Heat.

Reflecting the intensity of organic consumer interest

Rank	Brand (Account name)	Category	Search Volume	WOM Note Volume	Adjusted Engagement Index	Brand Score
1	Louis Vuitton (路易威登)		100.0	100.0	53.1	90.6
2	Chanel (香奈儿CHANEL)		68.5	88.6	49.2	72.7
3	Hermès (HERMES)		37.1	75.8	38.3	52.8
4	Chow Tai Fook (周大福 CHOW TAI FOOK)		54.7	48.9	27.8	47.0
5	Dior (DIOR迪奥)		33.0	46.9	62.7	44.5
6	Miu Miu (Miu Miu缪缪)		47.9	30.4	39.4	39.2
7	Coach (Coach蔻驰)		48.5	27.8	30.4	36.6
8	Loewe (LOEWE罗意威)		24.8	27.0	78.8	36.5
9	Saint Laurent (SAINTLAURENT圣罗兰)		25.8	2.2	97.1	30.6
10	Ralph Lauren (Ralph Lauren拉夫劳伦)		51.3	9.7	30.8	30.5
11	Cartier (卡地亚Cartier)		36.4	18.6	38.1	29.6
12	Van Cleef & Arpels (VanCleefArpels梵克雅宝)		38.9	11.8	46.6	29.6
13	Valentino (VALENTINO华伦天奴)		14.4	9.5	93.0	28.1

RISE Index: Heat.

Reflecting the intensity of organic consumer interest

Rank	Brand (Account name)	Category	Search Volume	WOM Note Volume	Adjusted Engagement Index	Brand Score
14	Gucci (GUCCI)		16.8	33.7	37.3	27.7
15	Graff (GRAFF格拉夫)		13.9	3.2	100.0	26.8
16	Longchamp (珑骧Longchamp)		32.3	10.8	38.4	24.9
17	Chaumet (CHAUMET尚美巴黎)		11.4	2.7	95.9	24.8
18	Bulgari (BVLGARI宝格丽)		21.2	19.6	41.0	24.5
19	Rolex*		21.2	28.5	21.4	24.1
20	Songmont (Songmont山下有松)		15.5	0.4	86.1	23.6
21	Prada (Prada普拉达)		13.4	21.6	46.2	23.3
22	Tiffany & Co. (Tiffany蒂芙尼)		16.4	9.7	54.7	21.4
23	Laopu Gold (老铺黄金)		31.8	6.4	30.0	21.3
24	Versace (VERSACE范思哲)		10.7	6.3	68.4	20.5
25	Balenciaga (Balenciaga)		22.4	9.3	39.0	20.5
26	De Beers (De Beers戴比尔斯)		3.5	1.6	91.2	20.3

*The brand doesn't have an official RedNote account.

RISE Index: Heat.

Reflecting the intensity of organic consumer interest

Rank	Brand (Account name)	Category	Search Volume	WOM Note Volume	Adjusted Engagement Index	Brand Score
27	Swarovski (施华洛世奇SWAROVSKI)		11.7	17.9	40.9	20.0
28	APM Monaco (APM Monaco)		19.1	9.8	42.1	20.0
29	Celine (CELINE 思琳)		19.5	13.5	29.8	19.2
30	MCM (MCM)		26.5	7.4	23.9	18.3
31	Burberry (Burberry)		11.7	18.1	31.8	18.3
32	Tod's (TODS)		3.9	0.8	80.0	17.9
33	Maison Margiela (Maison Margiela 梅森马吉拉)		9.9	5.8	56.6	17.6
34	Michael Kors (MICHAEL KORS迈克高仕)		7.7	2.1	68.3	17.6
35	Fendi (FENDI)		4.9	13.1	49.8	17.2
36	Rado (RADO雷达表)		0.3	1.6	80.2	16.8
37	Calvin Klein (Calvin Klein)		17.9	2.4	42.2	16.6
38	Audemars Piguet*		4.6	13.7	42.5	15.8
39	Harry Winston (Harry Winston海瑞温斯顿)		10.7	1.7	53.1	15.6
40	Buccellati (Buccellati布契拉提)		14.7	4.0	40.1	15.5

*The brand doesn't have an official RedNote account.

Appendix

Brand List.

Brand name (RedNote account name)

FASHION	Canada Goose (CanadaGoose加拿大鹅)	Golden Goose (Golden Goose)	Louis Vuitton (路易威登)	Ralph Lauren (Ralph Lauren拉夫劳伦)
Acne Studios (Acne Studios)	Celine (CELINE 思琳)	Goyard*	Maison Kitsuné (MAISON KITSUNE)	Rimowa (RIMOWA日默瓦)
Alexander McQueen (McQueen)	Chanel (香奈儿CHANEL)	Gucci (GUCCI)	Maison Margiela (Maison Margiela 梅森马吉拉)	Saint Laurent (SAINTLAURENT圣罗兰)
Alexander Wang (alexanderwang)	Chloé (Chloé)	Hermès (HERMES)	Maje (Maje)	Sandro (SANDRO)
Ami Paris (Ami Paris)	Christian Louboutin (ChristianLouboutin路铂廷)	Icicle (ICICLE之禾)	Marc Jacobs (MARC JACOBS)	Self-portrait (self-portrait)
Armani (ARMANI阿玛尼)	Coach (Coach蔻驰)	Isabel Marant (Isabel Marant)	Marni (MARNI)	Songmont (Songmont山下有松)
Balenciaga (Balenciaga)	Delvaux (Delvaux)	Jimmy Choo (JimmyChoo)	Max Mara (MaxMara)	Stone Island (STONE ISLAND石头岛)
Bally (BALLY)	Dior (DIOR迪奥)	Kate Spade (kate spade)	Max&Co. (MAX&Co.)	Stuart Weitzman (StuartWeitzman思缇韦曼)
Balmain (BALMAIN)	Dolce&Gabbana (Dolce&Gabbana)	Kenzo (KENZO)	MCM (MCM)	Tod's (TODS)
Berluti (Berluti)	Fendi (FENDI)	Lacoste (LACOSTE)	Michael Kors (MICHAEL KORS迈克高仕)	Tommy Hilfiger (TOMMY HILFIGER)
Boss (BOSS博斯)	Ferragamo (FERRAGAMO菲拉格慕)	Lanvin (LANVIN浪凡)	Miu Miu (Miu Miu缪缪)	Tory Burch (TORY BURCH汤丽柏琦)
Bottega Veneta (Bottega Veneta)	Ganni (GANNI)	Loewe (LOEWE罗意威)	Moncler (Moncler盟可睐)	Tumi (TUMI途明)
Burberry (Burberry)	Giada (GIADA)	Longchamp (珑骧Longchamp)	Montblanc (万宝龙MONTBLANC)	Valentino (VALENTINO华伦天奴)
Calvin Klein (Calvin Klein)	Givenchy (GIVENCHY纪梵希)	Loro Piana (LoroPiana 诺悠翩雅)	Prada (Prada普拉达)	Versace (VERSACE范思哲)

**Brands don't have an official RedNote account.*

Brand List.

Brand name (RedNote account name)

Zegna (杰尼亚Zegna)

Jewellery

APM Monaco (APM Monaco)
Boucheron (Boucheron宝诗龙)
Buccellati (Buccellati布契拉提)
Bulgari (BVLGARI宝格丽)
Cartier (卡地亚Cartier)
Chaumet (CHAUMET尚美巴黎)
Chopard (Chopard萧邦)
Chow Sang Sang (周生生)
Chow Tai Fook (周大福 CHOW TAI FOOK)
Damiani (DAMIANI)
De Beers (De Beers戴比尔斯)
Fred (FRED斐登)
Graff (GRAFF格拉夫)
Harry Winston (Harry Winston海瑞温斯顿)
John Hardy (JohnHardy)
Laopu Gold (老铺黄金)
Mikimoto (MIKIMOTO御木本)
Pandora (PANDORA潘多拉珠宝)
Pomellato (Pomellato宝曼兰朵)
Qeelin (Qeelin麒麟)
Swarovski (施华洛世奇SWAROVSKI)
Tasaki (TASAKI塔思琦)
Tiffany & Co. (Tiffany蒂芙尼)
TSL | 谢瑞麟 (谢瑞麟珠宝)
Van Cleef & Arpels (VanCleefArpels梵克雅宝)

Watches

A. Lange & Söhne (朗格)
Audemars Piguet*
Baume & Mercier (名士表)
Blancpain (BLANCPAIN 宝珀)
Breguet (BREGUET宝玑)
Breitling (BREITLING百年灵)
Girard-Perregaux (GP芝柏表)
Hublot (HUBLOT宇舶表)
IWC Schaffhausen (IWC万国)
Jaeger-LeCoultre (积家Jaeger-LeCoultre)
Longines (浪琴表)
Omega (欧米茄OMEGA)
Panerai (沛纳海Panerai)
Parmigiani Fleurier (PARMIGIANI帕玛强尼)
Patek Philippe*
Piaget (伯爵PIAGET)
Rado (RADO雷达表)
Richard Mille (RICHARDMILLE理查米尔)
Roger Dubuis (罗杰杜彼)
Rolex*
Tag Heuer (TAGHeuer泰格豪雅)
Tissot (瑞士天梭表Tissot)
Tudor (TUDOR帝舵)
Vacheron Constantin (江诗丹顿 Vacheron Constantin)
Zenith (ZENITH真力时)

Wine & Spirits

Absolut Vodka (绝对伏特加中国)
Chandon (CHANDON夏桐)
Cloudy Bay (CloudyBay云雾之湾)
Glenfiddich (格兰菲迪 Glenfiddich)
Hennessy (轩尼诗Hennessy)
Johnnie Walker (尊尼获加 Johnnie Walker)
Martell (马爹利MARTELL)
Moët & Chandon (MOET酩悦香槟)
Rémy Martin (Remy Martin人头马)
The Macallan (THE MACALLAN麦卡伦)

*Brands don't have an official RedNote account.

Methodology.

Brand pool

Download the *RedNote Beauty Index*, released this September, featuring 70 premium beauty brands across skincare, makeup, and fragrance categories.

“Luxury” in this report refer to luxury of personal luxury goods, specifically encompassing designer apparel (ready-to-wear), footwear, leather goods, accessories, watches, jewellery, and wine & spirits. The terms excludes the following categories: beauty (skincare, makeup, and fragrances), automobiles, aircraft, cruises, furniture and home décor, fine art, and the hospitality sector.

Each luxury brand is selected based on its product portfolio and consumer perception, and categorised as follows:

- Fashion: Brands focusing on ready-to-wear, leather goods, footwear, accessories, including those with multi-category offerings where these segments represent the core of their brand equity and revenue contribution.
- Watches: Brands specialising in watchmaking, watchmaking, including those with multi-category offerings where watchmaking represents the core of their brand equity and revenue contribution.
- Jewellery: Brands specialising in jewellery, including those with multi-category offerings where jewellery represents the core of their brand equity and revenue contribution.
- Wine & Spirits: Brands specialising in wine & spirits.

This report includes ultra-luxury brands, high-end luxury brands, aspirational luxury brands, and selected accessible luxury brands. While some of these brands may deviate from traditional definitions of luxury in terms of pricing or brand equity, they are included based on one or more of the following criteria: affiliation with a luxury conglomerate, a strong presence in premium retail environments, or a brand activation strategy in China that aligns with luxury brand practices.

The positioning of brands within the luxury spectrum is influenced by several key factors:

- Price premium;
- Quality and rarity of raw materials;
- Craftsmanship and production excellence;
- Product exclusivity and authenticity;
- Service quality and personalisation;
- Exclusivity and prestige of points of sale.

To ensure the selected brand pool best represents the luxury sector’s presence on RedNote within a limited sample size, brands meeting the following criteria have been included:

- Brands with an active and ongoing Official Account on RedNote as of 1 June 2025;
- Brands without an official account but with a high volume of user discussions on the platform;
- Priority has been given to brands with a higher number of brand mention notes, due to the limited capacity of the brand pool.

Data on brand accounts, word-of-mouth notes, and commercial notes in this report is sourced from Xinhong and covers the period from January to June 2025. Figures may differ slightly from actual performance due to data limitations.

Search volume data is sourced from Juguang as an indexed figure, covering 2 April to 30 June. Due to platform limitations, only each brand’s top ten most-searched keywords are counted, which may not represent the actual total search volume.

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DLG (Digital Luxury Group) is an independent marketing and technology group with offices in Geneva and Shanghai. The company provides social media, e-commerce, CRM, consulting, and creative services to luxury and lifestyle brands. DLG is renowned for its expertise in defining and implementing impactful business strategies, combining technological know-how, creativity, and luxury savoir-faire to target sophisticated consumers.

DLG also publishes Luxury Society, a trusted intelligence platform for luxury executives, offering a global perspective on the industry through exclusive studies, reports, analysis, features, and in-depth interviews with industry leaders.

https://digitalluxurygroup.com
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新榜
NEWRANK.CN

As a data-driven content technology company, Newrank serves the content industry by providing content marketing, live streaming e-commerce, copyright distribution and content asset operation and management services, relying on social media resources and content data products covering all levels of the omni-channel, to help Chinese enterprises acquire and manage digital content assets.

In 2018, Newrank won the title of "Top Ten Cultural Enterprises in Shanghai". In the same year, he Shanghai parent company and Beijing branch of Newrank were recognized as "National high-tech enterprises". In 2020, Newrank won the first place in the business Group A of the National Content Technology Innovation and Entrepreneurship Competition. In 2023, Newrank was rated as "Shanghai Top Innovative Enterprise" and won the title of "Shanghai digital Advertising Leading Enterprise".

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Xinhong is a data analysis tool for RedNote under Newrank. It collects a vast amount of accounts and creative materials, providing multi-dimensional data including influencer accounts, notes, SEO traffic, brand marketing, live-streaming e-commerce, etc. It helps brands with seeding and traffic operation, and offers a comprehensive insight into the RedNote ecosystem.

Contact Us

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