



INFLUENCER MARKETING IN CHINA

TRENDS AND OBSERVATIONS

2025 Report

Management Issues in Strategic Communication Lab

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INTRODUCTION

In recent years, China has emerged as one of the most dynamic and innovative markets for influencer-driven communication. Influencers, often referred to as Key Opinion Leaders (KOLs) or Key Opinion Consumers (KOCs), play a pivotal role in shaping public opinion, driving consumer behaviour, and enhancing brand visibility in a highly competitive digital ecosystem. Their significance has grown alongside the rapid expansion of social media platforms such as WeChat, Weibo, Douyin, and Xiaohongshu, which provide fertile ground for brands to engage

audiences in authentic and interactive ways. Both domestic and international companies have quickly realised the impact of influencers in China. Using them has become an essential component of effective public relations and especially marketing.

Against this backdrop, our research project described in this report was designed and implemented as part of the Strategic Public Relations Management module in the Master of Media & Communication Programme at the Wee Kim Wee School of Communication and Information, Nanyang Technological University, Singapore.

First conducted in late 2023 and then tracked and updated across 2024 and 2025, the initiative involved 15 graduate students from China, who were divided into five teams. Each team examined how two Chinese and two international companies leveraged influencers in the Chinese market, resulting in 20 detailed case studies. The 20 companies were Colgate, Lululemon, Alibaba, PopMart, Luckin Coffee, Coconut Palm, KFC, Tim Hortons, Nike, Puma, Li-Ning, Anta, Perfect Diary, Florasis, Dior, L'Oreal, BYD, Mercedes-Benz, Xiaomi and Intel. The more recent updates to the case studies were completed by one of these students, Amber Lin Xinyi. In addition, Joe Peng, a seasoned digital communication specialist, refined and verified the materials, strengthening the project's academic and practical value.

These case studies, published in this report, offer insights into the evolving landscape of influencer engagement, highlighting both opportunities and challenges faced by organisations operating in China. Additional insights and commentary into the field of influencer marketing in China were provided by Joe Peng and Ferdinand de Bakker.

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INFLUENCER MARKETING IN CHINA



INFLUENCER MARKETING
WORKS BECAUSE IT FEELS
MORE LIKE A TRUSTED
REFERRAL THAN A TYPICAL
CELEBRITY ENDORSEMENT

Influencer marketing is a digital or social media strategy where brands collaborate with content creators (or 'influencers') to promote products and services to their followers. Mirroring the principle of Key Opinion Leaders, influencer marketing leverages the influencer's ability to connect with their followers, generate brand awareness and drive sales in a manner that feels more like a trusted referral than a typical celebrity endorsement. With that said, an increasing number of celebrities have become influencers in themselves, often connecting with their fans directly through social media.

Globally, influencer marketing has quickly become an indispensable part of brand strategy. Today, the global influencer industry is a multi-billion-dollar business with millions of influencers across various social media platforms such as Instagram and YouTube. China represents one of the world's most advanced and experimental influencer marketing ecosystems, making it worthwhile to study how brands there engage with audiences. The country's unique blend of

massive social media penetration, sophisticated e-commerce integration, and culturally attuned storytelling has turned influencer marketing into a mainstream driver of both brand equity and direct sales. Unlike in other markets, Chinese platforms such as Douyin, Xiaohongshu, and WeChat have collapsed the traditional divide between content and commerce, allowing a single influencer post or livestream to move audiences seamlessly from awareness to purchase. Examining the Chinese approach therefore offers valuable insights not only into how domestic and global brands succeed in this market, but also into the future trajectory of influencer marketing worldwide.

We looked at 20 different companies (comprising both local and international brands) across four industry sectors (i.e. lifestyle, food and beverage, athletic goods, and beauty) to examine the ways in which each brand made use of influencers to promote their products and increase sales. Based on our findings, we developed the following 3C framework that helps us better understand how successful influencer marketing in China is done.

3C FRAMEWORK



Culture



Creator



Commerce

THE 3C FRAMEWORK: CULTURE, CREATOR, COMMERCE

The 3C framework—Culture, Creator, and Commerce—provides a structured way to analyse influencer marketing in China. It emphasises how brands must simultaneously align with cultural narratives, choose the right mix of influencers, and engineer seamless paths from content to conversion. Each component interacts with the others, creating a holistic system that explains why some campaigns succeed in generating both buzz and measurable sales. For each section, we pulled out relevant examples across the case studies to illustrate the points.

CULTURE

Culture refers to the way campaigns resonate with local values, identities, and social dynamics. In China, this often involves drawing on national pride, youth subcultures, or heritage aesthetics to create emotional connection. Successful influencer campaigns do not just promote a product; they embed the brand into cultural moments, festivals, or narratives that matter to consumers. Cultural “click” (aesthetics, youth values, national pride) is a growth lever when expressed through the right face and the right platform ritual. Notions of nostalgia, “nomadic serenity” and anti-hustle themes consistently outperform older patriotism-based hooks—core to what many call Guochao 3.0.

HERITAGE-DRIVEN BEAUTY

Brands, particularly beauty brands, tend to appeal to cultural pride and identity by fusing Chinese heritage aesthetics with empowerment narratives. For instance, Florasis fuses traditional motifs and ingredients with “Oriental aesthetics,” then validates with a modern celebrity (Wu Jinyan) who is noted for her classic Chinese beauty and her roles in Chinese period dramas. The campaign drove 58.1% YoY sales growth for the featured line, showing cultural fit + celebrity can lift results.

YOUTH IDENTITY AND CROSS-IP

By leveraging fans of established IP and idol-stars, brands can heighten their appeal to specific target consumers such as Gen Z. Colgate reframed its core promise for Gen Z (“Smile/Laugh Freely, Act Boldly”) and paired a top idol (Wang Yibo) with Doraemon to inject playfulness and widen reach; Weibo interactions topped 2.5M for the reveal.

NATIONAL MOMENTS AS BRAND STAGES

Similar to heritage-driven beauty, brands may also leverage on national pride and representation on global forums by associating themselves with participants at these events. Luckin Coffee pre-socialised national athlete Eileen Gu before her medal wins, then surfed the Olympic buzz (10B+ Weibo views on related topics) to reposition the brand for youth.

CREATOR

Creator highlights the strategic use of influencers across the spectrum: from headliners with mass reach to mid- and long-tail influencers who offer authenticity and trust. The Chinese market shows how different tiers of creators can be combined to balance aspiration with credibility. It also underscores the risks of over-reliance on a single anchor and the growing potential of alternatives such as virtual influencers.

HEADLINERS (REACH & SIGNALLING)

Headliner influencers, typically celebrities, national athletes, or top-tier idols with massive followings, play a major role in Chinese influencer marketing by delivering instant reach, high cultural signalling value, and a strong sense of aspirational identity for consumers. Their involvement elevates a campaign beyond product promotion and into the realm of cultural moments.

A clear example is idol Jackson Yee’s collaboration with Luckin Coffee, where the brand paired his nationwide appeal with warm, seasonal storytelling. His beverage tie-in sold 10.04 million cups in the first week, demonstrating how a single idol endorsement can accelerate both awareness and conversion at scale. Similarly, actress Zhou Xun’s partnership with Perfect Diary helped reposition the brand through the message of “Beauty Without Limits.” Her campaign achieved over 15.13 million topic reads, and during Double-11 sales, pre-orders

exceeded RMB100 million, including 450,000 lipsticks pre-sold—a testament to how celebrity association can elevate brand meaning and perceived premium value. In the sports domain, athlete Eliud Kipchoge's collaboration with Nike brought not just fame but credibility. His image as a world-class athlete added authenticity and aspiration to local running communities, reinforcing Nike's longstanding performance narrative.

These examples highlight how headliners function as powerful symbolic assets. Their influence operates largely through the psychological mechanism of projection, where consumers associate the qualities of the idol—beauty, discipline, success, lifestyle—with the product being promoted. By choosing to consume the same beverage, beauty item, or sports gear as their favourite celebrity, audiences enact a form of identity alignment. In this way, headliner partnerships do more than drive visibility; they allow brands to embed themselves in the aspirational self-concepts of consumers, making the purchase both a functional choice and an expression of who they wish to become.

MID/LONG-TAIL (TRUST AND DEPTH)

While mega-influencers can generate large spikes in visibility, much of China's influencer marketing strength lies in the mid- and long-tail tiers, where trust and authenticity drive sustained engagement. These creators—typically with between a few thousand and a few million followers—occupy niche communities and cultivate personal credibility, making their endorsements feel more genuine and relatable to everyday consumers.

Nike effectively leveraged this segment during its Shanghai Marathon campaign by enlisting micro-influencers and community runners to share authentic training stories and race experiences. This strategy helped bridge elite sports with ordinary participants, transforming a global brand into a locally grounded community. Similarly, Luckin Coffee relied heavily on mid- and long-tail KOLs and KOCs on Xiaohongshu to post product try-outs, casual reviews, and short character-driven videos. These creators seeded early buzz that felt organic, building curiosity before major campaigns featuring celebrities like Jackson Yee.

In China's current market, mega-influencers (10 million+ followers) now function largely as prestige “media buys”—ideal for awareness but less cost-efficient for conversion. The highest return on investment (ROI) often comes from mid-tier KOLs (1–5 million followers), who deliver up to 1.4 times higher ROI in categories

such as beauty, lifestyle, and short-drama content. Their audiences are smaller but more loyal and interactive, allowing for deeper persuasion and higher purchase intent. As a result, most successful campaigns now pair one or two headline names for attention with a broad base of mid- and long-tail creators who sustain interest, diversify reach, and ultimately translate visibility into measurable sales.

CREATOR-CONCENTRATION RISK AND DIVERSIFICATION

While top creators and celebrity anchors can generate extraordinary traction, relying too heavily on a single influencer exposes brands to significant concentration risk. Influencers bring not only reach but also their personalities, reputations, and controversies—and when the latter arises, the brand becomes vulnerable by association. Diversifying the creator portfolio therefore serves two strategic purposes: it broadens relatability across different audience segments, and it mitigates reputational, operational, and performance risks that come with anchoring a campaign on one dominant figure.

The experience of Florasis illustrates this clearly. The brand's rapid rise was fuelled in part by its strong partnership with Li Jiaqi, the "Lipstick King," whose endorsements could instantly propel products into viral success. However, when Li Jiaqi made an on-air remark that sparked public backlash, Florasis suddenly found itself exposed to a risk that was entirely outside its control. The incident demonstrated how a creator's missteps—however unintended—can spill over into brand sentiment, sales performance, and long-term equity.

In response, Florasis moved quickly to diversify its influencer ecosystem, expanding beyond super-anchors to include a broader mix of KOCs, mid-tier KOLs, and cultural ambassadors. The addition of Wu Jinyan as a new celebrity partner further dispersed risk while offering a different form of appeal rooted in elegance and heritage aesthetics. This multi-layered strategy not only stabilised the brand's influencer mix but also strengthened its cultural positioning and consumer trust.

The implications are clear. In China's fast-moving influencer market, brands must treat creators as part of a portfolio, not a single point of dependency. A robust mix of headliners, mid-tier influencers, and everyday KOCs ensures that campaigns remain resilient, relatable, and adaptable—even when one creator faces shifts in public perception.

COMMERCE

Commerce captures the tools and techniques that move audiences from engagement to purchase. In China, influencer marketing is tightly integrated with e-commerce through livestreaming, coupon sales funnels, and platform ecosystems such as Douyin and Tmall. Campaigns succeed when they design the “last mile” of the consumer journey, ensuring that cultural resonance and influencer reach translate into actual sales and customer loyalty.

A defining feature of China’s influencer landscape is the seamless integration of content and commerce, where entertainment-driven engagement is engineered into highly efficient conversion pathways. Livestreaming, fan-to-store funnels, and major e-commerce festivals form the core of this system, enabling brands to translate visibility into measurable sales at extraordinary scale.

LIVESTREAMING

Livestreaming functions as a powerful sales engine, exemplified by Luckin Coffee’s landmark 18-hour livestream on Douyin hosted by Hua Shao. The event generated 250 million exposures, over RMB1 billion GMV, and 2.14 million orders, with nearly 58% of purchases coming from new customers. This demonstrates the effectiveness of combining charismatic hosting, time-limited promotions, and platform-native storytelling. Livestreams collapse the marketing funnel, which means awareness, evaluation, and purchase happen in the same moment, making them one of the most potent tools in the Chinese digital marketplace.

FAN FUNNELS

Beyond livestreaming, brands also rely on fan funnels that guide audiences from emotional engagement to platform-based purchase. Colgate’s Tmall “Super Assist Station” is a prime example: by staging personalised idol call-outs, gamified tasks, and exclusive perks, the campaign transformed fan enthusiasm into repeat purchases and higher retention. These mechanics leverage the intensity of fan-idol relationships, converting attention into loyalty-building behaviours within Tmall’s ecosystem.

FESTIVAL CONVERSIONS

Finally, China’s e-commerce infrastructure allows brands to harvest demand during shopping festivals, where influencer-driven attention translates into high-volume conversion spikes. Following Zhou Xun’s brand-elevating campaign,

Perfect Diary saw over RMB100 million in Double-11 pre-sales, including 450,000 units pre-sold. Shopping festivals act as conversion accelerators, rewarding brands that have built sufficient cultural capital and visibility in earlier stages of the campaign.

Together, these examples illustrate how Chinese brands engineer full-funnel pathways—from excitement to action—by orchestrating influencer content, platform mechanics, and retail events. This commerce-driven sophistication is a core reason why China’s influencer marketing ecosystem is increasingly seen as a global benchmark.

Commerce in China is shifting from “public reach” to a multi-platform closed-loop private domain. As paid traffic gets pricier and less predictable, brands are architecting campaigns so that public-domain bursts (Douyin, Xiaohongshu, Kuaishou) hand off quickly into owned surfaces—not only inside the WeChat stack (Official Accounts, Channels, Shops/Mini-Programs, Pay, groups) but also within platforms’ native private ecosystems (e.g., Douyin Enterprise Accounts, Xiaohongshu Group Chats, Taobao Stores). The infrastructure is now there at scale: WeChat highlighted a +92% GMV jump for its Stores in 2024, and Channels-linked store GMV surpassed RMB100B in 2023 with ~RMB150B expected for 2024—while Douyin’s closed-loop GMV also grew rapidly, indicating that “content → checkout” inside a platform’s own private environment is becoming the norm.

How the private-domain loop actually works

The playbook is four moves:

- (1) Acquire: seed demand in public feeds, then route interested users with QR codes/deep links into private domains (Mini-Programs, platform-specific groups, or brand-owned social accounts);
- (2) Engage: nurture via short video and/or livestreams plus expert posts, quizzes and perks;
- (3) Convert: trigger purchase through in-platform shops (WeChat Shops, Douyin Store, Xiaohongshu Store) or brand Mini-Programs with coupons and member-only bundles;
- (4) Retain & learn: tag behaviors in these major platforms and automate follow-ups. Industry analyses repeatedly describe platform-owner documentation (Tencent, ByteDance, Alibaba) frames their ecosystems as bridges between private interactions (groups, DMs) and public discovery (short video/livestream). Recent product updates on Channels, Douyin, and Xiaohongshu add real-time analytics and fan segmentation, making the loop more measurable and schedulable.

What to operationalise

Treat every activation as a two-stage flight plan: public-domain reach to spark emotion and intent; private-domain retention to compound value (RPR/CLV). Concretely, pre-build in-platform store SKUs and coupon logic before content drops; instrument consent-based tagging in SCRM to trigger playbooks (e.g., “watched 3 lives → send trial voucher; lapsed 30 days → invite to members’ live Q&A”); and design Channel/Official-Account/Douyin Enterprise Account content as ongoing series rather than one-offs. Luxury and CRM playbooks in 2024–2025 consistently show that brands who run this cross-platform private-domain loop see stronger repeat-purchase and lower reliance on volatile public algorithms—turning campaign spikes into durable first-party relationships.





THE FULL FUNNEL: CROSS-CASE INSIGHTS

A typical influencer marketing funnel in China combines community buzz with engineered sales pathways. Campaigns often begin with seeding and user-generated content (UGC) on platforms like Xiaohongshu, where key opinion consumers (KOCs) and micro-influencers share authentic product trials. This creates grassroots credibility before a brand stages an eventised reveal—often involving a celebrity idol, an IP (intellectual property) crossover, or an offline spectacle that draws mass attention. Momentum is then sustained through always-on short videos on Douyin, keeping the product visible in everyday feeds. At the peak, brands may further drive scale through a large-format livestream anchored by a star host, using coupons and limited-time deals to trigger purchases. Finally, conversion is consolidated on e-commerce platforms like Tmall, while retargeting through private domain channels like WeChat nurtures repeat sales and loyalty. This end-to-end approach shows how influencer marketing in China tightly integrates content, community, and commerce.

In the next two sections, Mr Ferdinand de Bakker and Mr Joe Peng provide additional insights, thoughts and considerations for the future of influencer marketing in China.

THE HARD KNOCK LIFE OF INFLUENCERS IN CHINA *BY FERDINAND DE BAKKER*

Why do people, young women in particular, aspire to be and become influencers? What are the chances of success, to make either a lot of money, or to earn a living? What is their work-life balance like and to what extent should they worry about artificial intelligence and virtual influencers? What chances are there that the 'market' for influencers collapses altogether?

First of all, barriers to entry seem extra-ordinarily low. Practically everybody owns a smartphone and that is all you basically need to get started. Next, are the success stories that seem to indicate everyone can build a great career, receive complimentary products and even become wealthy beyond belief.

There are role models galore and this makes young individuals think they can replicate success, especially when they promote lifestyle products, such as fashion, health and beauty brands. In addition, developing a personal brand that attracts likes and followers does not appear to be as difficult, although in reality it very much is.

Certainly, the mega influencers, the superstars such as Li Jiaqi, of what in real life is a very tough and competitive business, can earn as much as RMB 50 million a year or more. But, there obviously aren't all that many influencers who can demand these kinds of fees. The estimate is far less than 1%.

The next tier of influencers may still earn RMB 20-40 million, when they get the opportunity to promote leading brands, or sometimes their own products. This group represents some 1% to 3% of the total market. The next tier, which would likely represent some 10% of the influencer market can still earn a very decent living, but face struggles in the longer term. As a result, the earnings of the remaining 85% are minimal.

Earnings aside, as exciting as it sounds to be a successful influencer, the work-life balance is far from what could be considered healthy. Many influencers only manage to be active for 1 to 2 years, before they throw in the towel due to exhaustion and stress. The time demands are enormous, as the work does not stop at the never-ending need to produce quality content, but also requires the need to stay abreast of trends and events in the influencer world, as well as their clients and the relevant industry sectors.

The question on everyone's lips is what risks artificial intelligence will do to the demand for influencers' content and endorsement. Virtual influencers are already part of today's marketing tools and appeal to all brands. AI tools, powerful already, will rapidly become ever more sophisticated and change the way influencers work. Finding the answers to leveraging or maximising human personality could become a deciding success factor.

As in all business sectors, developments are either at play, or will change the world as it operates today. Government regulation is one that must be considered and prepared for. Oversupply of influencers has its risks; platforms may increase or decrease in importance and usage; and the influencer market will most likely become more professional, performance-driven and competitive. Influencers will have no choice but to work with management representatives, who in turn will deal with clients directly, or marketing and advertising agencies.

FUTURE THOUGHTS ABOUT INFLUENCER MARKETING IN CHINA BY JOE PENG

THE FUTURE OF INFLUENCER MARKETING AND IMPACT OF AI

Artificial Intelligence (AI) will turn China's influencer playbook from campaign craft into model-driven systems. On the supply side, Generative AI industrialises production while enabling mass personalisation at the edge: scripts, cuts and thumbnails are spun up in hours. Creator identities multiply as KOLs act as both storytellers and buyer/curators—running storefronts, sourcing SKUs and nurturing communities—with AI assisting in product selection, inventory and fan analytics.

Distribution and measurement are becoming AI-native. Matching briefs to the right creators, predicting breakout content and routing spend across Douyin, Xiaohongshu and WeChat Channel will be handled increasingly by AI-enabled solutions. KPI stacks evolve beyond reach/GMV toward Return on Community (owned audience created) and Return on Learning (how fast the system improves), underpinned by clean-room data and consented first-party IDs.

Guardrails and growth loops will shape the next advantage. Tightening rules on synthetic media make compliance a design-time function: labels, substantiated claims and pre-flight checks baked into briefs, assets and livestream scripts. In parallel, the economics tilt from public reach to private retention, turning

attention into consented data, loyalty and repeat purchase. Net-net, the winners will master full-funnel orchestration—AI-made stories to spark intent, compliant delivery to protect trust, and private-domain loops to compound value over time.

GOVERNMENT REGULATIONS AND VIRTUAL INFLUENCERS

Firmer guardrails, not a brake. Recent national rules set a clear floor: deep-synthesis provisions and generative-AI measures require conspicuous and technical labelling for synthetic media, while internet-advertising rules keep brands, platforms and endorsers liable for truthful, clearly identified ads (including live-commerce). Furthermore, regulations effective from late 2024 require influencers who discuss “serious” topics such as finance, health, medicine, law, or education to provide proof of relevant professional credentials (e.g., a degree, license, or certification), aiming to curb misinformation in key verticals. 2025 updates standardise explicit labels and embedded watermarks, pushing compliance upstream into briefing, asset creation and livestream scripts. Short-form micro-dramas are encouraged to professionalise under clearer filing/content standards—curbing low-quality tropes while allowing brand x creator story arcs to scale if scripts and metadata meet the rules.

What this means in practice. Expect stricter pre-flight checks and shared liability on synthetic endorsements: virtual or “digital-clone” faces ship with visible AI-generated markers and traceable attribution, and ad claims must meet truth-in-advertising standards. On the demand side, brands prize digital hosts’ controllability and 24/7 availability, and the ability to sharply reduce costs associated with large production teams and physical studios; on the supply side, platforms report tangible cost/performance gains, though the core challenge is shifting from pure technology to navigating platform-specific compliance rules for virtual hosts.

CONCLUSION

The cases reviewed demonstrate that influencer marketing in China thrives on the 3Cs: Culture, Creator, and Commerce. Campaigns succeed when they:

1. Anchor in culture by aligning with audience values, aesthetics, or national pride.
2. Balance creator portfolios across headliners and mid-/long-tail influencers, mitigating reputational risk and driving both aspiration and trust.
3. Engineer commerce loops through livestreams, coupon sales funnels, and shopping festival tie-ins, ensuring that attention translates directly into transactions.

Overall, influencer marketing can be a highly effective strategy when executed thoughtfully. Influencers build trust with their audience by being authentic and relatable. Brands can tap into niche audiences that align with their products by working with the right influencers. With the right influencer marketing strategy, influencer campaigns can lead to significant returns, including increased brand awareness, engagement, and sales growth.

We expect the Chinese influencer marketing industry to become even more sophisticated. It is likely to evolve towards more integrated ecosystems where storytelling, influencer collaboration, and retail are inseparable. Brands that master this loop will remain ahead.



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FOR MORE INFORMATION

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Communication professionals, both senior inhouse executives and experienced consultants, have the opportunity of a lifetime to play an ever more significant role, serving as a social antenna, guiding policy matters and strategy, and engaging with multiple stakeholders, communicating what their organisations, or clients are, stand for and aim to achieve. In this lab, our research focuses on the communicator's role, foundational concepts, stakeholder engagement and strategic sector communication. Our past research has looked at contemporary issues like corporate purpose, the future of the chief communication officer, and employee engagement.

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