

October 2022

the bigger picture

# Moving Up



Changing perceptions and paths  
towards a high-quality life



Welcome

# Welcome to The Bigger Picture

by MediaCom

MediaCom unleashes brands' growth by helping them See the Bigger Picture. This means that we apply our unique 'Systems Thinking' philosophy and technology to all marketing levers: media, message and data. As a result, we design communication strategies that deliver short term results and help brands build for the future.

As part of WPP, the world's largest marketing communications services group, and GroupM, WPP's consolidated media investment management arm, we have access to the richest data, most robust benchmarks and most advanced capabilities in the market. This helps us provide comprehensive solutions to all marketing challenges.

Our success is underpinned by our long-standing 'People First, Better Results' belief. We know that by investing in our people's whole-person wellbeing, careers and capabilities, we will help grow our clients' businesses.

In 2022, this approach led MediaCom to be crowned Global Media Network of the Year by Adweek, Festival of Media Global and Spikes Asia, in addition to being Eurobest's current Media Network of the Year and the most awarded agency at the WARC Media Awards.

MediaCom is one of the world's leading media communications specialists, with billings of US\$17.2 billion (Source: COMvergence, 2021). Its global client roster includes adidas, Coca-Cola (TCCC), Dell, Mars, P&G, Bose, AkzoNobel, Richemont, Shell, Sony, and Hasbro, etc.

In January 2023, MediaCom is merging with Essence to form EssenceMediaCom, infusing Essence's digital strategy, data-driven creative, analytics and technology capabilities with MediaCom's world-class, scaled multichannel audience planning and strategic media expertise. The new agency will operate across 125 offices and include 10,000 people.

## Foreword

How will your brand accompany consumers on their ascent towards higher quality of life?

**C**hina's GDP per capita exceeded the US\$10,000 mark for the first time in 2019, marking the nation's official transformation to a middle-class society in which people from all walks of life are able to pursue their ideal life through the consumption of goods, services, and experiences. Yet, unprecedented economic, societal, and cultural transformations continue to reshape consumers' values, attitudes, behaviors and preferences. Furthermore, COVID-19 and related restrictions have led Chinese people to rapidly reevaluate their priorities.

So, what is the ideal life that Chinese consumers are currently pursuing? What is holding them back? How can brands help consumers achieve their aspirations?

China is at the cusp of another great structural change and so, it's crucial to take a step back and revisit the very meaning and manifestations of a high-quality life for Chinese consumers. Starting by decoding their higher intrinsic motivations, we aim to inspire marketers to capture an outsize share of the emerging growth dividends with new offerings and communications to meet new demands and aspirations.

We have identified 6 major consumer cohorts that illustrate and influence the shifts under way and conducted 37 one-on-one in-depth interviews in 12 locations across city tiers to paint their rich and nuanced portraits. In doing so, we've uncovered a changing and diversifying concept of a high-quality life in the minds of Chinese consumers with major implications for how they make choices today and well into the future.

**Join us on  
the journey –**



**Meha Verghese**  
Growth & Innovation Lead  
Editor-in-Chief



**Bonnie Hu**  
Comms Planning Director  
Report Author



# Contents

## 6 Introduction

The definition of a high-quality life is evolving and expanding

## 8 Macro Drivers

Reshaping consumers' values and behaviors

## 10 Decoding Quality of Life

9 common building blocks

## 16 Urban Seniors

A brilliant '2nd chapter of life' with more free time and more money

## 18 Modern Moms

Better me, better kids

## 20 Sophisticated Gentlemen

Multi-faceted masculinity for a rich and detailed life

## 22 Middle Class Singles

A self-defined, self-created life

## 24 Small-Town Gen Z

Being extraordinary in ordinary living

## 26 Ambitious Blue Collars

Break through for rebirth

## 28 Case Studies

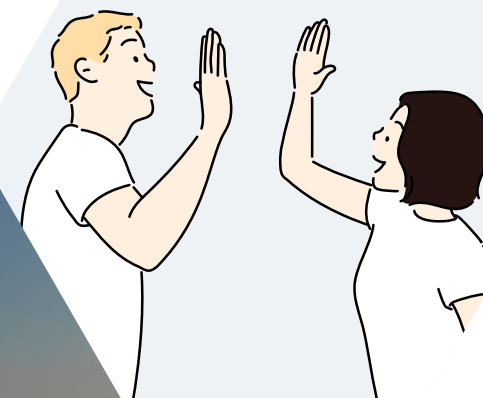
How brands are marketing to consumers' quality of life aspirations

## 30 New Opportunities

Richer consumer portraits reveal new and nuanced opportunities for marketers

## 32 Moving Up Together

Principles for brands to accompany consumers on their ascent





# The definition of a high-quality life is evolving and expanding

As China has undergone multiple economic, societal, and cultural transformations over the past decades, Chinese people’s shared perception of a high-quality life has transformed in turn.

**The Four Big Items** (四大件), namely a bicycle, a sewing machine, a radio and a wristwatch, were the universal symbols of a high-quality life in the planned economy era from the 1950s to the 1970s. As China embarked on reform and opening up in the 1980s, these items were replaced by **The New Four**: a TV, a refrigerator, a washing machine, and a tape recorder. From then on, each new wave of growth brought with it a new and expanding list of big items. Today, the very concept of a common checklist of ‘must-have’ goods is outdated. Long gone is a singular standard of high-quality living as is a definitive ideal lifestyle such as a lifelong job with stable income (铁饭碗). Instead, what comprises a high-quality life in the eyes of Chinese consumers is increasingly diverse.

China’s GDP per capita exceeded the US\$10,000 mark for the first time in 2019, marking the nation’s official transformation to a middle-class society in which people from all walks of life are able to pursue their ideal life through the consumption of goods, services, and experiences.

Digitalization has transformed the lives of all Chinese people, over one billion of whom are constantly connected to the internet via their mobile phones. Information, communication, entertainment, education, commerce, and more are at one’s fingertips. Yet, in embracing the diversity and vitality of digital life, people also find themselves facing new problems such as growing inequality, rising anxiety, and limiting bubbles of personalized information.



- Urban Seniors**
- Post-60s and post-70s (aged over 50 years old) living in T1 and T2 cities
  - Household Monthly Income (HMI) > RMB 12,000 in T1; > RMB 10,000 in T2
  - Open-minded, willing to spend money and actively pursuing hobbies



- Modern Moms**
- Post-85s and post-90s moms in T1/NT1/T2 cities with 1 or 2 children
  - Post-95s moms and expectant moms in T3 cities
  - Uncompromising in both personal life and parenting goals



- Sophisticated Gentlemen**
- Men aged 25 to 35 years old living in T1 and T2 cities
  - Mix of life stages: single, married, married with kids
  - Ample spending power: RMB 6000+ monthly disposable income
  - Investing time and money on personal image management and hobbies



- Middle Class Singles**
- Aged 30 years old and above singles living in T1 and NT1 cities
  - High income: HHI > RMB 15,000
  - Well-educated with bachelor’s degree or higher; international experience preferred
  - ‘Single by choice’ with high life quality, diverse values and lifestyle



- Small-Town Gen Z**
- Post-95s (aged 18 to 26 years old) living in T3 and below cities
  - Mix of youth who stayed local and youth who returned to hometown
  - Single or married without children; early jobbers or university students
  - Open-minded to consumption and with an independent point of view



- Ambitious Blue Collars**
- Post-80s to post-95s service industry workers e.g., ride-hailing drivers, waitstaff, beauticians, food delivery riders, etc. in T1 and T2 cities
  - Mix of life stages: single, married, married with kids
  - Personal monthly income of RMB 6000 to 8000
  - Invest time and money in self-advancement

Furthermore, COVID-19 and related restrictions have led Chinese people to reevaluate their values and lifestyles, even as they still feel a stronger sense of security and a more positive outlook than the rest of the world.

Hence, it’s time to revisit the meaning, standards, perceptions, and manifestations of high quality of life for Chinese consumers.

To uncover rich insights and tensions related to quality of life, we identified 6 emerging consumer cohorts based on China’s macroeconomic changes and conducted 37 one-on-one in-depth interviews in 12 locations across city tiers and geographic regions. We probed consumers’ aspirations, consumption motivations and habits, interests and hobbies, challenges and frustrations and more to deeply comprehend each group’s current vs. ideal life.

Some of these cohorts have been widely covered in industry reports while others have been largely overlooked. In this report, we go beyond data points to delve into consumers’ mindsets and motivations, hearing from them in their own words, to paint a new, nuanced, and forward-looking portrait of each group. By doing so, we aim to guide marketers towards capturing an outsize share of growth from consumers actively pursue their definition of higher-quality living.



# Macro drivers are reshaping consumers' values and behaviours

**C**hinese society is increasingly ageing, urban, and individual – these trends as highlighted by the 7th national population census reflect shifting socioeconomic structures that are influencing consumers' values and changing the shape of consumption. Understanding the macro forces at play provides important context to the evolving perceptions and paths to higher quality of life.

## 1 Economy

As China's GDP growth cools from double- to single-digits, the focus has shifted to high-quality, sustainable growth. In 2020, the government unveiled a "dual circulation" strategy to reorient the economy towards expanding domestic demand while also growing international trade and investment.

Domestic demand is driven by the growing middle class, which is expected to double from 400 million to 800 million people in the next 15 years (Source: Accenture). Their spending has transformed China into a largely service-based economy as tertiary industry rose to 56.5% of GDP in the first half of 2020 according to China's National Bureau of Statistics. This service industry boom not only satisfies consumer demand, but also creates myriad new jobs and gives rise to the growing 'gig economy.'

## 2 Society

While China is still home to the world's largest consumer base, declining marriage and birth rates, rising life expectancy and increasing urbanization are all changing social structures and giving rise to new consumer values and needs.

China's population increased by just 480,000 people to reach 1.41 billion during 2021 (Source: National Bureau of Statistics). Despite the government's best efforts to encourage marriage and childbirth, marriage registrations hit a 36-year low in 2021 while the total fertility rate was stuck at just 1.15 (vs. 2.1 needed to replace deaths), leading some experts to predict that the Chinese population will start to shrink this year. As women's economic position has changed, but their status within the family has not, many of them are choosing to delay or reject getting married and having kids, resulting in more diversified family structures and more individual consumption. Meanwhile, the share of people aged 65 and above stood at 13.5% of the population in 2020 and will rise to one-fourth by 2050. China's ageing population will shift demand towards sectors such as senior-friendly leisure, healthcare, and elder care services.

The nation's consistent growth engine will continue to be the burgeoning middle class. This group accounts for more than half of China's urban population with a total discretionary spending power of RMB 13.3 trillion. With over 50% of total retail consumption coming from Tier 2 and below cities across China (Source: McKinsey), the new middle class is a strong and diverse consumption power.

## 3 Technology

China is leading the world in 5G internet adoption and is expected to reach 892 million connections in 2025 according to industry body GSMA. 5G unlocks the potential of AI and cloud computing to revolutionize industries from drone farming to intelligent retail and to enable smart city infrastructure as well as the impending blockchain revolution. These innovations will massively upgrade the economy and improve people's quality of life.

Furthermore, improved connectivity continues to change how we communicate and disseminate information: 2G to read text, 3G to see pictures, 4G to watch videos, 5G to enter the metaverse. In addition, powerful algorithms make information more targeted and personalized, further shaping consumers' tastes and desires.

SOCIETY

China's population increased by just

**480,000**

people to reach 1.41 billion during 2021

## 4 Environment

The global COVID-19 pandemic, rising temperatures and increasingly frequent natural disasters have brought health and safety as well as environmental issues to the forefront of consumers' minds. Furthermore, as China announced its goal to become carbon neutral by 2060, consumers have become more conscious of the impact their individual behaviors have on the planet. 83% of Chinese surveyed agree that "the entire society, including all organizations and individuals, should begin to transition towards sustainability" (Source: Accenture).

While conscious consumption has been largely led by government policy, e.g., waste recycling, electric vehicle subsidies, etc., merchants and brands are joining in. Both Jing Dong and Alibaba pursued multiple 'green' initiatives during this year's 618 shopping festival, launching gamified experiences to reward sustainable behaviors, making it easier to find 'green-certified' products, joining hands with brands to reduce packaging, and offsetting the carbon footprint from their logistics carriers' and data centers' energy usage.

According to Accenture's recent consumer survey, while 43% of consumers are willing to pay a premium for green products today, more than two-thirds claim to know which brands are sustainable / ethical and which ones are not. Hence, we are likely to see more businesses and consumers alike consider environmental impact in their decision-making.



# Decoding consumers' perceptions of quality of life

9 common building blocks

The World Health Organization (WHO) defines quality of life as “an individual’s perception of their position in life in the context of the culture and value systems in which they live and in relation to their goals, expectations, standards and concerns”.

The concept of quality of life is inherently ambiguous and subjective. What’s more, as Chinese consumers from all walks of life move beyond basic physiological and safety needs and towards the pursuit of self-actualization, their characterizations of an ideal, high-quality life are increasingly diverse.

Nonetheless, through our consumer interviews, we’ve identified common themes or building blocks of a high-quality life in the eyes of Chinese consumers. Here, we look at the 9 building blocks and the shared meaning they hold before exploring how the specific aspiration, relative weighting, and pursuit of these quality of life building blocks differ by consumer cohort.



## 9 Building Blocks of Quality of Life

### Health

Health is a universal consideration and a fundamental requirement for pursuing many other aspects of a high-quality life.

Nearly every interviewee regardless of age, gender, region, or education level mentioned the importance of mental health, underscoring that the concept of health has expanded from physical health to holistic physical, mental, and emotional wellbeing. The COVID-19 pandemic has propelled consumers to actively pursue better health through increased daily hygiene, improved food quality and new exercise routines to maintain physical and mental fitness. According to the latest Kantar China MONITOR survey, 76% of Chinese consumers are willing to spend more money on products and services that are good for their health.

Another common theme in consumer interviews was the equation of being healthy with looking and feeling young. However, this focus on youthfulness (even to the point of gerontophobia) could actually hurt, rather than help, consumers’ mental health.

“I think being happy is as important as being healthy, you will naturally be healthy if you’re in a good mood.”

Urban Senior, Car Rental Company Owner, Shanghai

“Some comments on Dianping are like “I’m glad to eat in this restaurant today, but there are no cute and beautiful little brothers or little sisters...” which is a very real problem is today’s society.”

Ambitious Blue Collar, Restaurant Wait Staff, Hangzhou

### Wealth

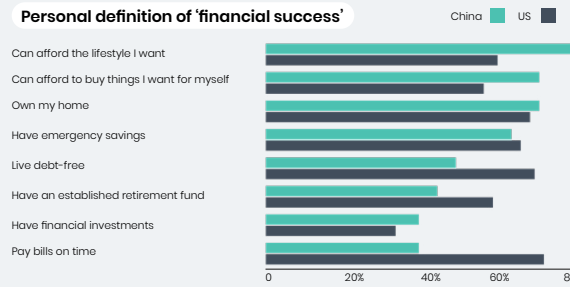
Wealth lays the solid foundation for quality of life. For most Chinese people, achieving financial freedom is still their ultimate aspiration. Working hard towards this goal, they face the age-old dilemma of money vs. time. As the old song goes, “I want to visit Guilin. But when I have time, I don’t have money; when I have money, I don’t have time.”

Previously, wealth was to be enjoyed during retirement and by the next generation. Now, we found that many middle-class consumers have started to ask, “when is enough?” and “what should be my prioritized values?” to be able to enjoy life now. The emerging definition of wealth is the financial security to choose how to spend one’s time. Especially after experiencing the COVID-19 pandemic, Chinese consumers are re-evaluating whether, how and how far to pursue financial gain.

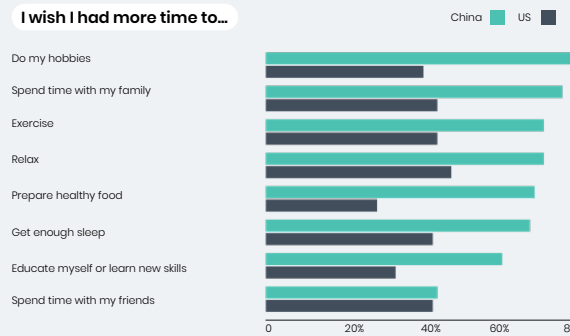
“When you’ve got financial freedom, you don’t need to rush for money anymore. You have the confidence and right to say “no” to what you don’t want.”

Sophisticated Gentleman, Restaurant Chain Company Director, Qingdao

For Chinese consumers, financial success is closely associated with material satisfaction



Yet the pursuit of financial success leaves them with limited time for hobbies, family time and healthy routines





Employment

Employment is the primary way to accumulate wealth and gain social status. However, consumers are expanding what they want out of a job, which is changing the nature of work itself.

People are looking for more than a paycheck, they want to be fulfilled by work and to have better work-life balance. Opening a small and beautiful business – a car repair shop, a café, a flower shop, a homestay – has become ideal work in which to find enjoyment and meaning in the eyes of many consumers across walks of life.

Yet, we also uncovered divergent aspirations around employment split largely by social class. Disenchanted by long hours, competition and office politics, many young middle-class Chinese are carving out unique career paths by pursuing multiple careers simultaneously. According to Tsingyuan Research, the number of ‘slashers’ exceeds 80 million, most of whom are highly educated. Whether working a day job as an HR manager and a side job as an outdoor lifestyle blogger or freelancing in one or multiple fields, pursuing a ‘slash’ career enables people to pay the bills while expressing their creativity and pursuing their passions. What’s more, it signifies being unwilling to compromise one’s quality of life in exchange for job security and broad social recognition.

Yet stability and ‘decency’ are precisely the most valued aspects of ideal work among many blue-collar workers. Faced with the uncertainty of the gig economy, physically taxing work, and the need to hide one’s true feelings to please customers, many blue collars crave a job with a steady paycheck and greater respect.

“I’d like to open a homestay in a wheatfield with 3 or 5 girlfriends, have our own small yard, bake, drink coffee, read and chat, live freely without any burden.”

Middle Class Single, Technology Client Service, Shanghai

“I’m trying to become a staff in public institutions. It’s the same amount of money, but a stable job with regular slow pace. Besides, it sounds decent for my parents and relatives.”

Ambitious Blue Collar, Beautician, Guangzhou



Outdoor Blogger / HR Professional



Airline Steward / Fashion Blogger

Source: RED

Sense of belonging

A sense of social belonging – community acceptance and connection – is highly valued and much needed to defeat feelings of isolation, an inevitable by-product of individualization and urbanization that put mental and physical distance between people.

The fundamental unit of community remains one’s immediate family. The COVID-19 pandemic increased the importance of family bonding to consumers, especially among urban seniors and modern moms. Yet, these cohorts are adapting their expectations of family members to acknowledge, if not embrace, the desire for independence and personal space.

Young people are increasingly turning to circle culture (圈层文化), i.e. communities with shared values, interests, and hobbies, for social belonging beyond traditional family structures and typical friend groups. As they explore niche passions, Chinese youth care less about fitting in to the mainstream and care more about digital and physical connection with like-minded peers.



“I hope that we can be close friends, but she needs to have independent thinking and make her own decisions, what I should do is listen, understand and advise.”

Modern Mom, Pharmaceutical Sales Representative, Hengyang

“Friends are very important to me, they are from different circles, someone you just hang out with, someone you share similar interest, someone you can work with, also someone you can trust.”

Middle Class Single, Electronics Company Director, Shanghai

A recent report identified 8 major categories, 32 sub-culture groups and 169 cultural circles among Chinese youth



Source: Youthology

Freedom

Freedom means ‘being able to be the real me and control my own life’. People are seeking freedom to follow their heart even in the face of responsibilities and uncertainties.

Freedom could mean rejecting society’s expectations in favor of staying happily single, choosing an unconventional career, or joining China’s growing FIRE (Financial Independence, Retire Early) movement, or a sense of freedom can come from simply finding moments to be yourself during a busy day.

“To live in my own way and devote my life to what I really love, that’s the quality of life for me.”

Middle Class Single, Export E-Commerce Partner, Guangzhou

“The most enjoyable moment of the day is when my baby falls asleep because I have a moment of purely being myself. I’m always a mom as long as he is awake.”

Modern Mom, Accountant, Hangzhou

Leisure

Leisure is sought after not only for rest and relaxation, but also to reward oneself for surviving the stress and repetition of daily life. Indeed, 76% of Chinese consumers consider recreation “a way to regulate one’s life and bring surprise and freshness” according to a recent study by People’s Data Research Institute and Bytedance.

Nearly all consumers mentioned travel as a means to escape, recharge and expand one’s horizons, whether urban seniors exploring popular destinations together or middle class singles venturing off the beaten track. Consumers also find pleasure in daily moments of self-indulgence.

“I really enjoy the skincare application moment before bed when I only think about my skin. I feel satisfied when I see my skin improving thanks to the effort I’ve made.”

Small Town Gen Z, Insurance Service, Lanzhou

I do domestic travel now riding my motorbike. I want to travel around the world in the future, through which to open my mind, get inspirations for my work, and so I can create a strong IP product under my name.”

Middle Class Single, Electronics Company Director, Shanghai



Learning

Learning is a universal means to climb up the social ladder towards a higher quality of life in addition to providing the intrinsic benefits of expanding one’s knowledge and perspective.

Almost everyone we spoke with, regardless of age or socioeconomic status, was investing in self-improvement whether attending ‘seniors university’, watching parenting experts’ videos, participating in self-funded business seminars or social etiquette workshops, listening to self-help podcasts, or pursuing new professional certifications. In fact, 79% of consumers are willing to spend money on learning to improve their knowledge and skillset (Source: Kantar China MONITOR).

However, 66% of consumers felt “pressure to learn new skills and improve oneself”, putting this personal pressure at the top of the list ahead of work- and family-related sources of stress per the same survey. As the education industry booms, learning could become a new plane of ‘involution’ to avoid being left behind vs. evolution to break through to a better life. Traveller Magazine reported that 44% of books displayed in China’s airport bookstores are in the personal growth and career development categories – but are they selling knowledge or anxiety?

“I sometimes attend senior management training. It costs RMB 8000 for 1 day and 1 night. It is a great opportunity to learn the latest news in the industry, also to make connections with top men.”

Sophisticated Gentleman, Engineer, Shanghai

“I hope to take the exam to get into a government-affiliated institution. Having an associate degree is qualified for application. I’m using my leisure time to study the exams on the app.”

Ambitious Blue Collar, Beautician, Guangzhou

Technology

Technology is one of the most important enablers and signifiers of high-quality living in consumers’ eyes.

Owning the latest technology, whether smart phones or smart home devices, makes consumers feel like they are moving up in life. Indeed, interviewees across cohorts pointed to technology purchases as the ones of which they are most proud, and Accenture reports that the penetration of smart home appliances in Chinese homes increased from 38% in 2017 to 64% in 2021.

Technology flattens the world, democratizing access to information as well as to a greater variety of quality goods and services, thereby enabling small-town gen Z and ambitious blue collars to go beyond their social and geographic limitations.

“Technology changes life. Like floor sweepers and floor washers, these technology products replace labor, so we can save time to do more meaningful things. The increment of my life quality and sense of happiness is worth more than 4000 yuan.”

Small-Town Gen Z, Math Teacher, Xinyang

Environment

Environment is gaining importance as pandemic restrictions have inspired a newfound appreciation of the great outdoors as well as safe and pleasant living conditions.

As consumers flock to new outdoor pastimes like camping, fishing, surfing, scuba diving, etc., they are also becoming more conscious of their impact on the natural environment. At the same time, they have a greater desire to create a beautiful and cozy home that is a haven after a busy day or during times of turmoil. Whether renters or owners, many consumers are investing in improving their homes as evidenced by the 200 million views of the topics “useful renovation tips” and “renovation budgeting” on RED.

“I bought this apartment a few years ago, paid attention to interior design, but now what I’m looking for is a high-end neighborhood, which has an AI runway outside, it records your miles.”

Sophisticated Gentleman, Financial Services, Chengdu







# Urban Seniors

A Brilliant ‘2nd Chapter of Life’ with more free time and more money

有钱有闲, 精彩的第二人生

## Why this cohort

China is home to 140 million people aged between 60 and 70 years old and the country’s silver population will be dominated by people under the age of 70 until 2030. With abundant pension, good health and ample free time, urban seniors are becoming an important growth engine in the context of China’s ageing society.

Seniors’ pursuit of quality life is centered around slowing down ageing, maintaining social connection, and embracing modern life – the goods, services, travel and entertainment they never had in their youth – to the max.

## Key quality of life drivers:



## Stay Healthy

Urban seniors invest significant time and money on slowing down ageing. They spend money on health supplements, anti-ageing skincare, exercise equipment and health-monitoring devices, and they regularly dedicate time to physical exercise. Similar to younger consumers, the vast majority of seniors recognize a more holistic concept of ‘health’ including mental wellness. A full 78% of seniors surveyed by Mintel report that they highly value and actively maintain a positive mental state – an even greater proportion of respondents than those who said the same about physical fitness (72%).

Supplements and skincare are two common methods to improve health and delay ageing.



Source: Urban Senior interviewees’ photos

## Stay Up to Date

Seniors try to stay open-minded and to keep up with trends to blend in with their peer group and with broader society. Media and technology play crucial roles in this pursuit – 62% of urban seniors have used O2O platforms to purchase daily necessities and a sizeable 42% report sharing life updates on social media at least once a week (Source: Mintel).

“I do not reject new things. I especially like watching new variety shows, such as rap, and I do not think they are out of tune with us. Trendy things make me very happy.”

Urban Senior, Car Rental Company Owner, Shanghai

“I saw smart locks installed on my neighbors’ doors and I thought that my old lock does not look good, it looked like I was not keeping up with the situation. In fact, the old lock is easier to use.”

Urban Senior, Retired, Xiamen

## Stay Connected and Stay Useful

No longer required to “吃苦” or bear the relentless pressures of family, work and societal responsibilities as in decades past, this generation is looking for ways to build a new self-identity and to feel like a valued member of society. Taking up new hobbies like square dancing or enrolling in a seniors’ university are common ways to make connections. For many urban seniors, looking after their grandchildren or even seeking out a second career are choices that help them to feel useful and stay mentally alert.

“Looking after his kid is something I want to do for him to share the load, but it does not mean I have to do it. If I have my own things to deal with, I can have this freedom at any time.”

Urban Senior, Retired, Shanghai

“I still keep in touch with some contacts I knew before retirement. I occasionally do some odd jobs for others, though not to make money. This way, I feel I’m not so old and useful.”

Urban Senior, Retired, Xiamen

Urban Seniors showed off massage chairs, imported electronics and fitness trackers from top brands



Source: Urban Seniors Interviewees’ Photos

## Stay Adventurous

Urban seniors have dedicated their ample leisure time and retirement income to seeing the country and the world. In 2021, Chinese seniors spent over RMB 700 billion on tourism with a strong preference for customized tours (Source: Silver-Hair Tourism Report). Their newfound desire for indulgence can be triggered closer to home, too: 44% of seniors in Tier 1 cities plan to spend more on eating out (Source: Mintel).

“I used to only focus on work and taking care of my family. I didn’t know there were so many nice things. While I’m still young, I’d better enjoy life more, travel more and see more.”

Urban Senior, Retired, Xiamen



Source: Urban Seniors Interviewees’ Photos

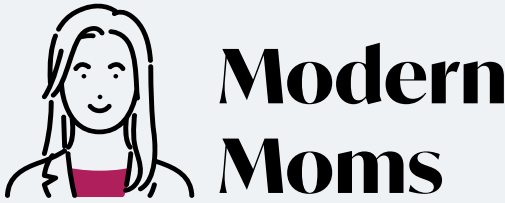
## High relevance categories:

Healthcare, Tourism, Electronics, Gaming, Apparel, FMCG

## Marketers’ opportunity:

Urban seniors are looking for brands that cater to their needs but don’t ‘dumb things down’ or ‘other’ them as ‘old people’. How can brands meet their desires to feel young, keep up with the times and enjoy lifelong learning?





Better me, better kids

“鸡”娃不如“鸡”自己

### Why this cohort

In recent years, the driving force of the maternal and infant market's growth has shifted from population growth to consumption upgrading. Two-thirds of new mothers are post-90s and post-95s women who, equipped with modern parenting philosophy, are willing to pay for a high-quality life for their children and themselves. Hence, iiMedia predicts that the market size of China's maternal and infant industry will rise from 4 trillion in 2020 to over 7 trillion in 2024 even as the birth rate declines.

Unlike previous generations for whom being a good mother required sacrificing themselves for their family, this cohort of modern moms believe that taking care of themselves and building themselves up will enable them to be better mothers and to raise more independent, smart and healthy children.

### Key quality of life drivers:



### Starting From a Better Me

Modern moms believe that they need to be a better version of themselves, with a good career, engaging personality, independent thought, and attractive appearance (i.e., perfect in every way!) so that they can be confident and wise enough to be a role model to their children and make the right decisions about their care.

“In 3 years, I hope to have my own career. When my children go to school, I will run my own business, exercise, and do my hobbies. When they come back home, I will accompany them. In order to achieve this goal, I still have to improve myself...I think children have given me a lot of motivation.”

Modern Mom, Accountant, Hangzhou

### Managing Anxiety and ‘Me Time’

Modern moms not only have to deal with familial and societal expectations, but also their own high standards which cause them anxiety over not giving the best to their kids and losing themselves in the overwhelming responsibility of childrearing. They are acutely aware of how their emotional state affects their families and are willing to spend time and money on indulgences that put them in a better mood. In fact, 88% of post-95 moms say they spend more money on themselves after becoming a mom vs. before getting pregnant (Source: iiMedia)

“I’m not particularly good at controlling my emotions. Sometimes, I am a little impatient, or have the impulse to cry. I read an article before, saying that the emotional stability of parents is very important to shaping of children’s character...So, I always tell myself to be a peaceful mother so that my kids can feel the power in my calmness.”

Modern Mom, Securities Manager, Beijing

“When I buy skin care products, beautiful clothes, do yoga and spa, I feel that I belong to myself, and I’m do something for myself. I think if I tidy myself up and make myself beautiful, my mood will be different. Things will be very smoothly when I am in good mood, because a good attitude has a great impact on children and the whole state of life.”

Modern Mom, Company Cashier, Hangzhou

A pleasant ambience, daily self-care rituals and luxury indulgences help Modern Moms maintain a healthy, positive mindset.



Source: Modern Moms interviewees' photos

### Turning to Trusted Sources for Solutions

Many modern moms we spoke with shoulder the burden of making decisions about their children's education, complaining about insufficient support from dads and grandparents' old-fashioned outlook. Modern moms are on the hunt for the most efficient and effective parenting approaches and tools, including high-tech products and tailored solutions for different age stages and occasions. In fact, Yu'er Net reported that the Tmall sales of early education smart toys increased 3 times as fast as the overall toy category sales in 2020.

“I usually pay attention to what children eat on Xiaohongshu and I ask questions on Zhihu - the knowledge on Zhihu is quite broad. There's also Yuxueyuan, a platform focused on solving children's illnesses, which is more detailed. I also ask in the mothers' groups, but I still listen to education professionals like Fan Deng and Zhou Jinmei.”

Modern Mom, Programmer, Hengyang



### High relevance categories:

Mom & Baby, Education, Healthcare, FMCG, Beauty & Skincare, Luxury, Apparel / Sportswear, Technology

### Marketers' opportunity:

How can brands meet moms' need to help her family thrive by empowering her instead of communicating in anxiety-inducing ways? How can brands recognize mothers as individuals in their own right and give them the 'me-time' they crave?





# Sophisticated Gentlemen

Multi-faceted masculinity for a rich and detailed life

追求卓尔不群的人生

### Why this cohort

In China's seventh national census, men outnumbered women at 723 million (51.2% of the total population). What's more, men account for 55% of consumers who spend more than 1000 RMB online per month, and most of that group are men under the age of 35 (Source: Quest Mobile). After China's booming "She Economy," the "He Economy" is rising fast.

Although these sophisticated gentlemen have a good quality of life, they are aiming to ascend to a still higher social class. They invest a lot of time and money on preparing for success – managing their appearance, buying the right lifestyle badges and improving their knowledge (via social etiquette classes, business seminars, wine tastings, etc.). Yet, they are also discovering a deeper sense of self and the pleasures of new hobbies and rituals – the richness of life itself.

### Key quality of life drivers:



### One's Appearance Determines One's Future

The new generation of sophisticated gentlemen place great importance on maintaining a good appearance. In fact, 73% of men in tier 1 cities believe that appearance plays an important role in finding a job and finding a spouse (Source: Kantar Worldpanel). Appearance is not just about looks, but covers being well-groomed and well-dressed as well as having rich and varied hobbies (e.g., scuba diving, motorbiking) and interesting conversation topics.

"I attended an etiquette salon for about RMB 20,000 – a small salon with 5 to 10 people. The organizer used this money to prepare higher-end ingredients for us. Then, we chatted and learned how to eat and drink, how to talk, what details to pay attention to."

**Sophisticated Gentleman, Chain Restaurant Company Director, Qingdao**

"Personal image management is an expression of respect for others. From your outfit, skin, hairstyle, smell, to accessories, the moment you go out of your home, everything is under the management of personal image. People may not remember your name, but they may have an impression of your personal image."

**Sophisticated Gentleman, Exhibition Sales, Shanghai**

### Sophisticated Gentlemen are willing to spend on making the right impression



Source: Sophisticated Gentlemen interviewees' photos

### Yet, the Face of Masculinity is Changing

The definition of manliness has shifted from being 'macho' and aggressive and being the family's main provider to a more diversified concept that values being considerate, warm-hearted, creative, scholarly, tech-savvy, good-looking and family-oriented. In fact, a Mintel study reports that 'being considerate' is the ideal image for 52% of men.

No longer solely obsessed with career success and status, sophisticated gentlemen are embracing varied interests and experiences that make their life richer and more colorful.

"By free time, I mean having time to enrich yourself or go where you want to go. People's life is limited – the length is almost the same, but the width can be decided by you. Not everyone wants to live in mediocrity or peace. Many still want to pursue something deeper. There are many things to see and explore. I hope I can have something besides work."

**Sophisticated Gentleman, Engineer, Shanghai**

"I found that the sound quality of vinyl records is really good. Listening to the stereo or wearing Bluetooth headphones is incomparable. Smoking half a cigar with whisky while listening to vinyl at night is very comforting and relaxing. My whole body and mind get lost in it."

**Sophisticated Gentleman, Chain Restaurant Company Director, Qingdao**

### Sophisticated Gentlemen are embracing new rituals to relax and unwind



### Every Detail is Distinctive

Sophisticated Gentlemen pay careful attention to selecting goods and services – not just to impress others, but to satisfy their inner desire for excellence and uniqueness. The knowledge and stories behind the products can become even more powerful than the logos to reflect his tastes.

"There is a cool silversmith named Goro Takahashi in Japan who has passed away already. His shop is in Omotesando. There is a long queue every day because he has only one shop in the world. Many stars wear his pieces. The shop is tiny with few items in it. Takahashi only sells something to you when he thinks it suits you. Otherwise, he won't sell."

**Sophisticated Gentleman, Travel Agency Owner, Chengdu**

"I don't recognize brands, I recognize tailormade and handmade. The suit I made in a small private workshop may be much better than a suit that costs hundreds of thousands. This is a French-cut suit and shirt. The French shirt has a small collar point, and its lapels are beautiful. Let me tell you, there are several types of shirt collars..."

**Sophisticated Gentleman, Chain Restaurant Company Director, Qingdao**



Source: Goros

### High relevance categories:

Auto, Luxury, Spirits, Apparel, Travel, Finance, Electronics, Gaming

### Marketers' opportunity:

Looking back into Chinese history, masculine ideals were the blend of both the soft and the hard, specifically the 文 (scholar) and the 武 (martial). How can brands speak to and support Sophisticated Gentlemen's embrace of wen – intellect, literary talents, manners, hobbies and symbols – to play a role as Chinese men reinvent themselves?





# Middle Class Singles

A self-defined, self-created life

我不要你觉得，我要我觉得

## Why this cohort

In 2020, China's Ministry of Civil Affairs released data showing that China's single population had hit 240 million and the latest census data counts 125 million single-person households. Most singles live in top-tier cities, but their geographic footprint is still diverse: Guangdong, Henan, Sichuan, Shandong and Jiangsu provinces are all home to more than 10 million singletons.

Societal attitudes are changing from 'single dog' (单身狗) to 'single aristocrat' (单身贵族), especially amongst singles themselves. Even if being single is not the end goal, it is a sign of personal freedom and unwillingness to settle for less. Largely unburdened by family responsibilities, affluent, urban singles spend more on themselves – 42% of single consumers spend for pure self-indulgence compared to just 27% of consumers who are married with kids (source: iiMedia) – giving rise to the powerful 'singles economy'.

## Key quality of life drivers:



## Exploration is Life

For middle class singles, quality of life lies in exploration: going wider by exploring new experiences to broaden the scope of one's life and going deeper by finding one's passions and committing to them. They put their disposable income towards hobbies and travel to escape from the daily grind and are often the first to embrace new and trendy pastimes. RED reports that searches for 'frisbee' increased 17 times year-on-year in Q1 2022 while searches for 'cycling' were up 230% over the same period, driven by post-90s users.

"Work and life can't stay the same. You must find something new to do. Otherwise, why do you live for another year."

Middle Class Single, Engineering Manager, Shanghai

"In my free time, I am an advanced open water diver and I dive every six months to keep my certification active till we can travel abroad. In addition, I am learning bartending. There is no domestic exam for bartenders, so I can learn it myself. I'm looking for a class on new media editing at the moment. I also learn dance. If COVID goes away, I'll continue to make 2-4 foreign trips and 4-6 domestic trips each year."

Middle Class Single, Heavy Technology Sales, Guangzhou

Pursuing one's hobbies and passions and spending time with friends are of central importance



Source: Middle Class Singles interviewees' photos

## My Life, My Choice

Being single is a choice based on 'what's best for me at this moment.' Middle class singles refuse to compromise their values or lower their standards to comply with society's expectations. While they value social and romantic connections, they want to protect their personal space.

"Now, I can arrange my time freely and travel wherever I want. If I get married and have a family, I may have to think about more things, taking the time of my wife, the time of my children and all other aspects into consideration."

Middle Class Single, Electronics Company Director, Shanghai

"Nowadays, many girls have a set of criteria when looking for a partner. They hope that this man can support the family and have certain achievements and sorts. I don't like this kind of relationship with various rules. I still think everything should develop naturally."

Middle Class Single, Banking HR professional, Beijing

## My Exhibit of Exquisite Living

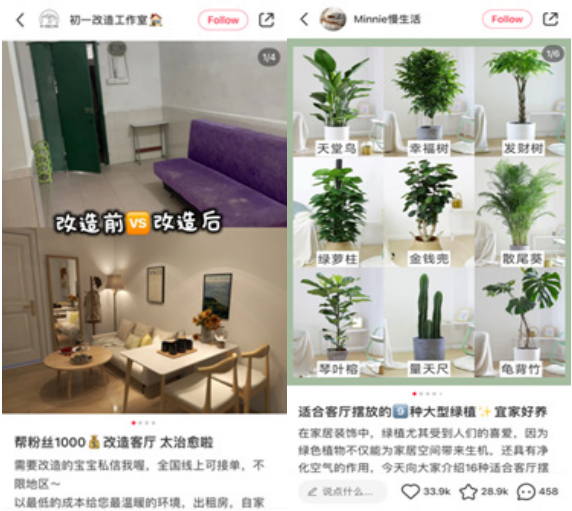
Although they have ample disposable income, middle class singles are not freewheeling spendthrifts. Singles identify the products and experiences that are the most meaningful and joyful to them and place these things at the center of their life's curated "exhibit" as captured in social media and present in their personal environment.

Beyond pursuing new and favorite hobbies alike, purchasing luxurious self-rewards and creating a tasteful living environment are of central importance. This desire among young singles is captured in the popular online catchphrase "The apartment may be rented, but life isn't" and the over 438,000 posts and 469 million views for the topic "rented apartment renovation" on RED.

"On drizzling rainy days, I'm in a warm room full of coffee aroma and have a comfortable bed. I hope that although I am alone, my friends are in my mobile phone and I can talk to them in bed at any time. When I want, I can meet them any time."

Middle Class Single, Electronics R&D, Shanghai

Treasured purchases, experiences and surroundings contribute to single's quality of life



Source: RED

## High relevance categories:

FMCG, Home Furnishings, Electronics, Luxury, Apparel, Beauty & Skincare, Travel, Petcare, Gaming and Entertainment

## Marketers' opportunity:

How can brands design their products and tell their stories in ways that show the lifestyle and experience benefits to ME and MY ideal way of life? How can they fill middle class singles' time and space, earning a place in their 'exhibit'?





# Small-Town Gen Z

Being extraordinary in ordinary living

生活不必在远方，眼前也可以有诗意

## Why this cohort

China's 230 million mobile internet users aged 30 and below living in lower-tier markets spend an average of RMB 2150 per month, only ~600 RMB behind their Tier 1- and Tier 2-dwelling peers (Source: Questmobile, JiuCheng).

The lower cost of living, increased leisure time and greater family support vs. life in a big city is not only keeping youngsters in their hometowns, but also attracting many to return home and make a decent living, including by starting a business of their own. According to the Ministry of Agriculture and Rural Affairs, more than 11.2 million people returned to their hometowns to start businesses between 2016 and 1Q2022. As small-town gen Z pursue higher quality living, China's sinking markets (下沉市场) are rising fast.

## Key quality of life drivers:



## Been There, Done That

More than half of small-town youth surveyed have spent an average of 3 years in bigger cities for work or study before returning home (Source: Southern Weekly). While they were amazed by the prosperity and prospects of China's metropolises, they were also conscious of the fierce competition, high cost of living and their lack of social network. Hence, returning home was a calculated decision to enjoy a smaller radius of life with greater ability to enjoy themselves.

"I used to work in tourism, so I have been to most of the big cities. I still remember vividly the 1st time standing on top of the Jinmao Tower at night around 8. Looking down, I suddenly felt I was so small and so poor. Nobody will notice me."

Small-Town Gen Z, Insurance Customer Service, Lanzhou

"Now I am very satisfied with the income and nature of this (teaching) job. I can pursue my passion in music and look forward to leading students in the future like my teacher did."

Small-Town Gen Z, Math Teacher, Xinyang

## Lower-Tier Life Offers Youth More Free Time for Leisure Activities



Source: Small-Town Gen Z interviewees' photos

## Family First

Small-town gen Z have a pragmatic approach to balancing societal and familial expectations with pursuing their own professional and personal desires. While they face family pressure to get married and have children at a young age, once they have checked off these big milestones, they can count on family support with childrearing and enjoy more personal freedom.

"When a woman has a child, she completes her task and can do what she wants to do. After I have a baby, my in-laws can help take care of it. I will have less pressure and more time to run my own business again. I think it is the best."

Small-Town Gen Z, Insurance Customer Service, Lanzhou

## Digital is the Portal to Leisure and Lifestyle

With more free time but fewer offline shopping and entertainment options vs. big-city peers, small-town gen Z turn to digital media and e-commerce to fulfill their needs. Small-town dwellers spend 163 hours per month online (+11% versus last year) and the penetration of e-commerce apps (89%) and short-video apps (81%) among lower-tier consumers is increasing to be on-par with the overall population (Source: Questmobile). What's more, 'austere' and 'price-driven' are no longer fit descriptors of lower-tier consumers, 83% of whom think it's worthwhile to spend money on treats like luxury goods, restaurant dining and travel according to Mintel. Yet, they lack good leisure options around them.

"My four-year experience in Changchun broadened my horizons. For example, Changchun has a light rail, but Jilin doesn't. There are places to play in Changchun like Four Seasons City, many zoos and botanical gardens, auto shows, but Jilin does not have them. These places are eye-opening. You can see more things, see more brands, and play more things."

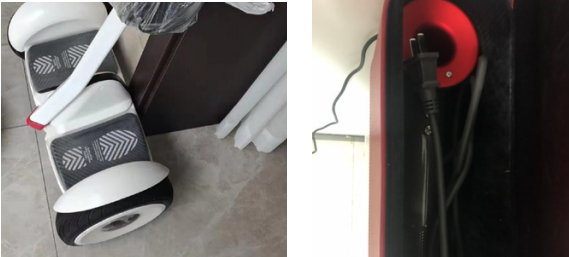
Small-Town Gen Z, Telemarketing Representative, Jilin

## High-Tech Products Are a 'Spiritual Connection'

Influenced by their experiences in big cities as well as by social media and e-commerce, small-town gen Z have embraced high-tech products as a 'spiritual connection' to fancy, big-city living. Many interviewees were quick to point to these possessions as indicative of a high-quality life, and Huawei and Xiaomi's smart device apps have each crossed 10 million monthly active lower-tier users (Source: Questmobile).

"A while ago, I saw an underwear washing machine on Little Red Book, which could free my hands. Old people would say you shouldn't use a machine to wash your underwear, but I think this thing is necessary. I saved time and I told my husband that I could buy underwear less often and it would be good for my body."

Small-Town Gen Z, Insurance Customer Service, Lanzhou



Source: Small-Town Gen Z interviewees' photos

## High relevance categories:

FMCG, Electronics, Entertainment, Gaming, Apparel, Mom & Baby

## Marketers' opportunity:

Small-town gen Z are living large beyond their physical boundaries thanks to social media and e-commerce, whether buying imported beauty products, luxury goods and high-tech appliances online or chilling out with mobile games and short videos. However, they lack the offline leisure experiences found in bigger cities. How can brands meet their specific needs online and offline without falling into a 'tier-1 too' trap?





# Ambitious Blue Collars

Break through for rebirth

破局重生

## Why this cohort

The twin forces of urbanization and digitalization have opened up a whole new realm of service industry jobs and boosted the tertiary sector to 55% of China's 2020 GDP. Blue collar workers are typically overlooked by marketers in favor of more affluent, educated consumers. However, among China's 120 million+ service workers, a new breed of ambitious blue collars with strong consumption power and high aspirations have emerged.

Forty percent of couriers, ride-hailing drivers and takeout delivery staff earn more than 9,000 RMB per month, higher than the starting salary for most university graduates. Yet, ambitious blue collars aren't willing to settle for the status quo – they are united in their determination to keep improving themselves to break through the ceiling of current social class towards a better quality of life.

## Key quality of life drivers:



## Drive Yourself Forward

Ambitious blue collars actively invest in self-improvement; many of our interviewees were pursuing online courses, saving to open their own business, studying for civil service entrance exams or networking with clients to advance their career prospects. Furthermore, growth prospects is the top consideration (55%) among this cohort when it comes to selecting a new job (Source: Sina Technology). They are determined not to be confined to the bottom rungs of society while painfully aware of the uphill battle to get ahead without social connections.

“It’s better to be promoted to the regional manager of the restaurant, but it’s difficult. Every turnip to its hole. I’m also learning makeup skills to earn some extra money. When I have the ability, I can open a small training class in the future.”

**Ambitious Blue Collar, Restaurant Wait Staff, Hangzhou**

“Even if I get married, I can only marry people who are similar to me, and my life will not have dramatic change.”

**Ambitious Blue Collar, Beautician, Guangzhou**

## Seek Inspiration and Small Joys

Many ambitious blue collars spend their limited downtime on social media (especially Douyin and RED) where they gather inspiration. This pastime coupled with more disposable income has led to more emotional consumption to boost their spirits. Yet paradoxically, even as they seek to emulate aspirational, affluent lifestyles online, they unknowingly encounter another type of social ceiling as we find platform algorithms give them a distorted, slightly dated, impression of middle-class trends.

“Xiaomi is my favorite brand. Their home products look warm and are cost-effective, much cheaper than international brands. My proudest purchase is a Laneige skincare set, quite expensive. I tried it and thought it was good, so I saved up and bought the set online.”

**Ambitious Blue Collar, Beautician, Guangzhou**

“I buy Starbucks gift cards and I like the pendants and keychains that come with the cards. I like to collect them as well as some Starbucks bags and moon cakes. When you have money, you can buy these things and feel happy for a while.”

**Ambitious Blue Collar, Food Delivery Rider, Wuhan**

Social media gives Ambitious Blue Collars a different picture of middle-class lifestyle (left) than middle class consumers hold themselves (right)

Miss Coco  
Delicate look  
Flower-arrangement  
Fine-dining  
Yoga  
Luxury brand  
Afternoon-tea  
Manicure  
Coffee

VS

Reading  
Cooking  
FengShui  
Scuba diving  
Yamaha  
Camping  
SPA  
Nomadic  
Healthy

## Finding Meaning, Starting Living

No longer forced to focus on basic needs, ambitious blue collars are expanding their physical and mental horizons. Social media and new experiences fuel their desire to keep moving upwards towards a higher quality of life.

“The most important part of quality life is to do meaningful things. Such as reading, traveling. For example, after I went to Guangzhou and Foshan, I knew that the food there was sweet. After I saw the sea, I knew how big and broad it can be.”

**Ambitious Blue Collar, Logistics Services, Wuhan**

“Life is living with hope, with that exquisite feeling. Little Red Book is full of exquisite living, beautiful pictures, and beautiful girls, same on Douyin. Then I realized that I had been staying alive for so many years. Now I want to live. I think I am still young and can still change my life and my thinking. It should work.”

**Ambitious Blue Collar, Property Management, Wuhan**

Travel broadens ambitious blue collars’ physical and mental horizons



Source: Ambitious Blue Collar Interviewees’ Photos



## High relevance categories:

Electronics, Gaming, Entertainment, Home Furnishings, Healthcare

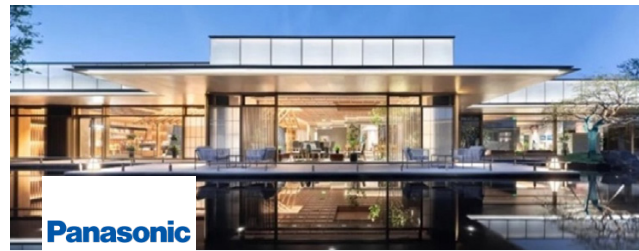
## Marketers’ opportunity:

Ambitious blue collars’ high consumption power and high ambitions create big opportunities for marketers. How can brands support them to achieve their goals and offer them affordable luxuries to enjoy their well-earned leisure time?



# How brands are marketing to consumers' quality of life aspirations

**B**rand are taking notice of consumer groups' diverging and evolving desires and are adapting their product development and marketing strategies to match. Here we share some interesting examples to inspire marketers to explore the abundance of untapped opportunities that remain.



Panasonic

## Urban Seniors

**Panasonic's Intelligent Seniors Village Enables Health + Community**

China's new generation of seniors are willing to pay for premium wellness products and services and are keen to embrace the benefits of technology to improve their daily lives. Panasonic and Yada International Group have built a 'Wellness Smart Town' of 1,150 homes for the elderly in Yixing, Jiangsu. Each home is equipped with smart home appliances to create a healthy, comfortable living environment. Features include smart air circulation and lighting, including a 'smart sleep' system, and IoT-enabled bathroom accessories that feed into a health monitoring platform to help senior dwellers better manage their health.



理然

## Sophisticated Gentlemen

**Make Sense (理然) Gives a Voice to New Masculinity and "Beauty"**

Male skincare brand Make Sense (理然) announced its new spokesman Jing Baيران by launching a commercial, "Men Want to Live Beautifully", with a rallying cry to Sophisticated Gentlemen across China. The brand's rousing video re-interprets the notion of 'beauty' from a female-oriented and appearance-focused concept to include 'an enterprising spirit for career, a love of life, a rigorous scientific attitude and the embodiment of loving yourself.' Make Sense moves beyond the traditional male-targeted advertising codes of wealth and career advancement to connect with male consumers' evolving mindset by elevating its skincare product communications into a celebration of the multiplicity of masculinity.



MINI

## Middle Class Singles

**Mini Countryman's World's 1st Car Hotel Taps Youth Hopes & Dreams**

The Nomad Hotel by Mini, first launched in 2019, connects the auto brand with young consumers' desire for novel experiences by enabling visitors to experience 'exquisite' outdoor life as well as the unique features of the Mini Countryman. At a Nomad Hotel, guests stay in tailor-made, luxurious roof tents atop Mini Countrymans while enjoying dining tents, a BBQ area, a campfire, and other facilities. During the 2020 COVID-19 lockdown, Mini launched "The Nomad Hotel in the Cloud" inviting consumers to join a trip through rugged Yunnan including stargazing via livestream. Its latest campaign evolution is a road trip reality show which touches upon young people's views on relationships, marriage, friendships and more.



Wuling

## Small-Town Gen Z

**Wuling Hong Guang's Electric Vehicle is a Stylish 'Fashion Accessory'**

China's homegrown auto brand Wuling Hong Guang has long been known as "the people's car" in reference to its humble origins as the most common van in rural China. However, when the company launched its Mini EV compact electric vehicle in 2020, it focused on positioning the car to appeal to the young generation, e.g., the Mini EV Macaron variant features exclusive body colors Avocado Green, Lemon Yellow and White Peach Pink thanks to a partnership with Pantone Universe. The Mini EV has quickly become Small Town Gen Z's super car – super affordable, super cute and super stylish. While Tesla might be the electric vehicle of choice for urban elites, Wuling Hong Guang's Mini EV 'fashion accessory' outsells it as the top-selling electric vehicle in China.



baby care

## Modern Moms

**Baby Care Launches Designer Confinement Wear to Help New Moms Feel Good**

Baby Care collaborated with international designers to launch a range of stylish and luxurious at-home loungewear. The designs allow new moms to look good and feel good while still being comfortable and practical for nursing. The brand is tapping into a sizeable market of moms whose mindset of 'happy mom, happy baby' means that they are willing to spend on themselves in addition to spending on their baby, as evidenced by over 30,000 posts related to confinement clothes on RED.



## Ambitious Blue Collars

**Kuaishou Launches Livestreamed "Fast Recruitment" Job Platform**

China's blue collar job market has long been highly inefficient when it comes to matching supply and demand and is fertile ground for recruitment scams. In January 2022, Kuaishou launched a blue collar recruitment livestreaming channel "快招工", which became an instant hit amongst recruiters and job seekers alike. The popular short video platform's new feature solves the major issues of trust and traffic hosting live broadcast recruiting events for the likes of BYD, Hisense and Foxconn and attracting over 100 million users per month in the first quarter of 2022. What's more, the platform is adding more features like Q&A and live workshops to meet blue collar workers' desire for self-improvement and decent employment.



# A richer portrait of China's major consumer cohorts reveals new and nuanced opportunities for marketers

## New Consumers //

Changing societal structures and values have given rise to more consumer cohorts that represent new sources of growth. Urban seniors investing time and money in a 'second youth' filled with leisure and learning, modern moms cultivating self-image and self-care to cope with the pressures of motherhood, middle class singles rejecting rigid age-based expectations to live life on their own terms all vividly illustrate how consumers' value systems and resulting behaviors are diversifying. There are more opportunities for brands to empower these consumers in their quest for a better life, to create meaningful consumption as an enabler or signifier of what higher quality living means to them.

## New Health //

Health is a fundamental building block of quality of life and there is a growing consensus that health is not just about the body, but also about the mind. This expanded definition has emerged as consumers grapple with fear of ageing, loneliness, societal involution, social media-induced insecurities, and COVID-19-related anxieties. Across the board, consumers are taking a proactive approach to mental wellness, whether taking up yoga and meditation, spending more time outdoors or creating personal sanctuaries through home décor and houseplants. Marketers should consider how to empathize with and alleviate (rather than add to) consumers' deep anxiety.

## New Desires //

Different consumer cohorts have different needs, but they don't exist in a vacuum. In their journey towards a higher quality of life, consumers are looking around and upwards for 'must-have' products and experiences. For example, in our interviews, high-tech products stood out as integral to high-quality living, not only because of their intrinsic benefits, but also because of their significance to consumers in terms of status and belonging. While groups like urban seniors or ambitious blue collars may need smartphones that are easier to use and more affordable, no one wants a 'dumbed down' or 'cheap' version of a product – marketers should design their offerings and communications accordingly as they seek to capture emerging demand.

## New Consumption //

We are witnessing a widespread shift from price- or performance-first consumption to feelings-first consumption. This new generation of conscious consumers value brands with distinct attitudes that reflect their own. From product and packaging design to communications to retail experiences, there are multiple opportunities for marketers to create added value by building unique brand identity.

Yet the recent economic downturn triggered by the 2nd wave of COVID-19 has made people reconsider value from a quality to premium price standpoint and challenge 'assassin' brands in various categories. Consumers are still seeking out novelty and identity in products and experiences, but there's a fine line between willingness to pay and unwillingness to being taken for a ride that marketers should heed.

## New Connections //

Life-long learning and self-improvement to fulfill intrinsic and extrinsic needs present opportunities for brands to educate consumers on themes like exclusivity, heritage, and craftsmanship via diverse digital touchpoints such as RED, Bilibili and Zhihu where consumers seek in-depth knowledge as well as via physical brand experiences (tastings, demonstrations, exhibitions). Tapping into the desire for knowledge can help brands to stand out by competing on higher values vs. product features alone as consumers' choices are dramatically enlarged and encouraged by e-commerce and social commerce.

## New Rituals //

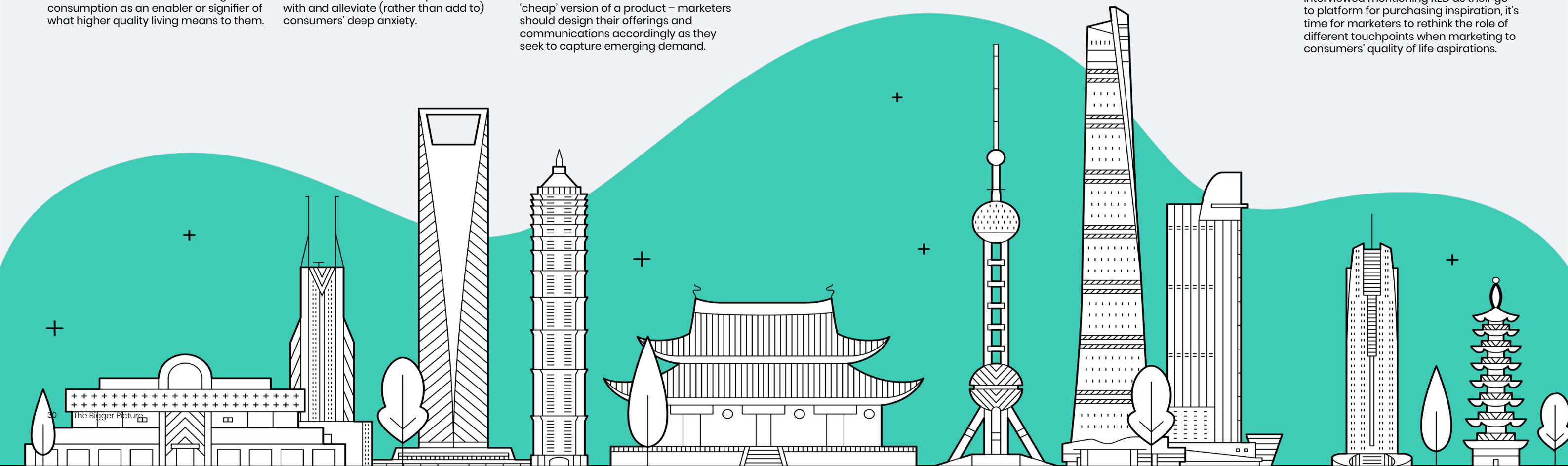
Diverse values, lifestyles and interests are fertile breeding ground for the creation of new rituals that, though small-scale, are considered integral to maintaining mental health and enjoying a truly high-quality life. Smoking half a cigar while listening to records, finding 10 minutes of pure 'me-time' in a nightly skincare regimen, decompressing over a weekly meal with friends, indulging in the home massage chair...marketers can get closer to consumers and increase loyalty and frequency by tapping or creating meaningful rituals.

## New Luxuries //

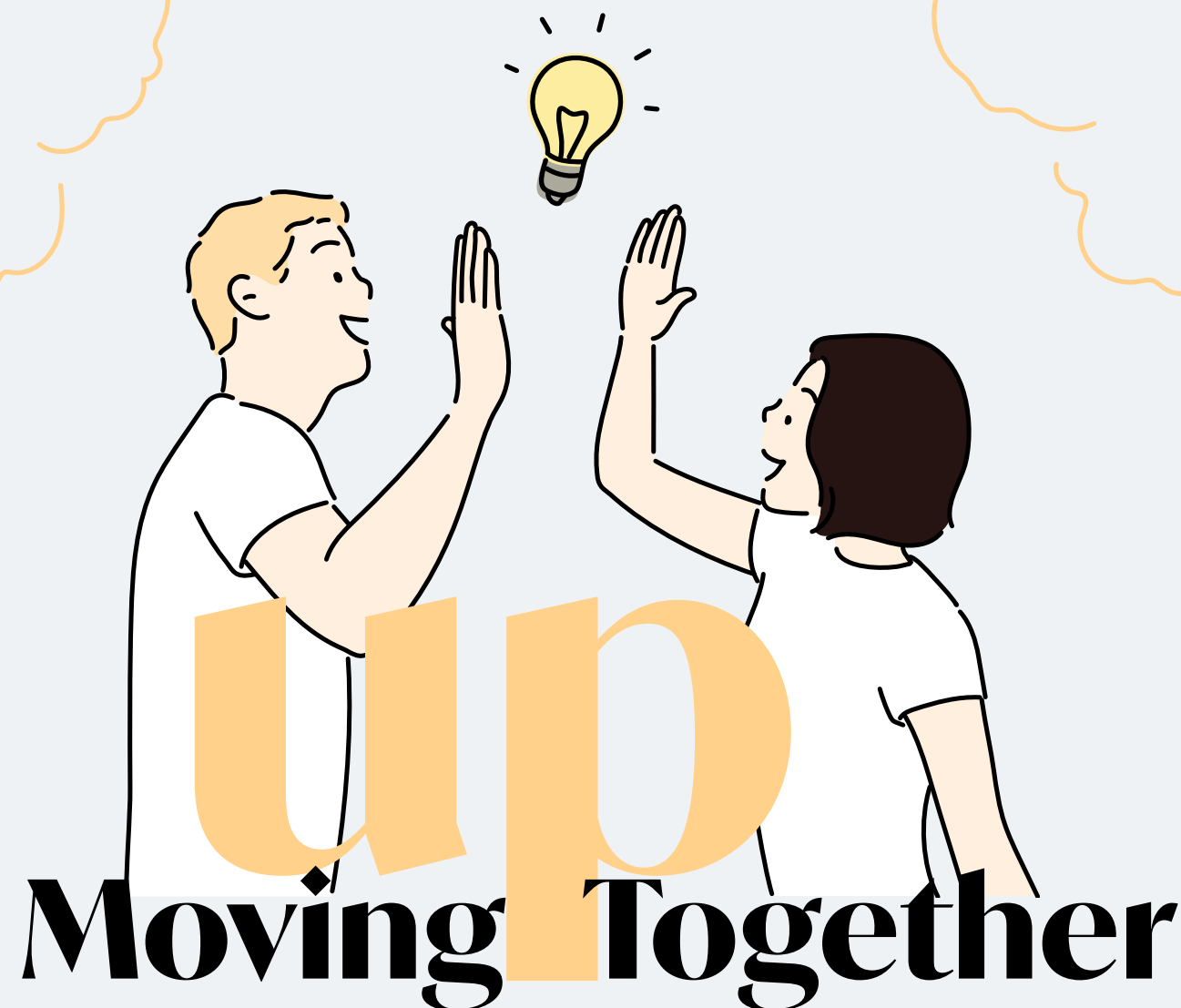
With higher consumption power and easier access to information, many consumers feel they can have whatever goods and services they want, whenever they want them. Yet in a time-poor and often predictable society, unexpected experiences remain scarce and hence luxurious. Consumers have an innate desire to venture into the unknown whether getting close to nature, trying out new hobbies like adventure sports, or exploring and expanding their life's radius via travel. On a more quotidian level, more real bonding moments with friends and family are longed for and cherished, too. Brands who don't distract from, but rather enable, these experiences can win over consumers' hearts and wallets.

## New Media //

The major social media apps are the new public squares where all types of consumers exchange information and gather inspiration. Platform data shows that Douyin, Kuaishou and RED are no longer the exclusive domain of the young generation, lower tier dwellers, or affluent females respectively. Twenty-five percent of Douyin's user base is above the age of 45, one-third of Kuaishou users live in Tier 2 and higher cities, and iResearch classifies only 10% of RED users as 'high consumption level'. With most of the ambitious blue collars and sophisticated gentlemen we interviewed mentioning RED as their go-to platform for purchasing inspiration, it's time for marketers to rethink the role of different touchpoints when marketing to consumers' quality of life aspirations.







Principles for brands to accompany consumers on their ascent

The diversifying consumer perceptions and paths towards a higher-quality life explored in this report create multiple new opportunities for marketers as summarized in the previous section. To seize an outsize share of the emerging growth dividends, marketers need to urgently reevaluate their status quo brand-building approaches according to the following principles:

### New Consumers | New Desires

→ Look beyond your current base to new sources of growth

Multiple consumer cohorts have high willingness and ability to spend on goods and services that they perceive as contributing to a better quality of life. Hence, it's time to look beyond the typical consumer battlefield – urban, middle class, Gen Z – and to be open-minded when exploring new sources of growth.

What's more, demographic descriptors fall short in a society where age is increasingly no longer the determinant of a set lifestyle. Advantage lies in understanding target consumers beyond demographic and psychographic labels and through a broader lens than media and buying behaviors alone. Starting from upstream and nuanced human insights will not only help pinpoint new growth opportunities, but also ensure the resulting products and communications stand out from the competition and resonate with consumers' desires and pain points.

### New Health | New Rituals | New Luxuries

→ Be a part of the wellness economy to benefit all

Fierce competition (often involution) on different fronts coupled with increasing recognition of social and income inequality have resulted in a generation of anxious consumers across different social classes. As they pursue holistic approaches to health and wellbeing including emotion management, brands can play an active role whether helping consumers create the perfect home sanctuary, being a part of their self-care rituals, enabling their social bonding time, or introducing them to new experiences.

### New Connections | New Luxuries

→ Embrace immersive experiences to solve for unmet needs

Freedom, belonging, and education are among the building blocks of quality of life common across all 6 cohorts. Yet physical distance, financial realities and, in the past few years, COVID-19 control measures impede many consumers' ability to pursue these goals. By leveraging technologies like cloud computing, livestreaming, AR and VR, brands have the power to bring people together and broaden our mental horizons in the virtual world.

Furthermore, as 'the metaverse' on the whole becomes increasingly mature and well-adopted, brands need to move beyond campaign-level activations and develop a long-term investment strategy to create a meaningful ongoing presence in the parallel virtual universe in addition to current digital and physical channels.

### New Consumption | New Connections

→ Stand for something to stand out to consumers

The new generation of conscious consumers value brands with distinct attitudes that serve as a badge to the outside world. Hence, brands need to stand for something and appeal to consumers' personal values and self-image to stand out among abundant choices.

As consumers spend more time researching their purchase decisions, it's imperative not only to say what one believes, but also to do what one says. Greenwashing or 'woke-washing' will soon be found out and face the intense scrutiny of China's active netizens. However, genuine and consistent purpose-driven actions can have outsize impact as the success of Dove's Real Beauty and, more recently, NEIWAI's No Body is Nobody platforms show.

### New Consumers | New Media

→ Rethink digital touchpoints for smarter, deeper connections

While consumers' individual hobbies and interests are increasingly rich and diversified, the content platforms on which they seek information and inspiration have aggregated into a common few. Hence, marketers need to move beyond using platform selection as a shortcut to audience targeting, e.g., Kuaishou for lower-tier, Bilibili for Gen Z, RED for affluent females, etc. Instead, it would be more valuable to analyze the variety in different consumer groups' content consumption behaviors on major platforms, using platform data and tools to inform more effective creative, social content and media investment strategies to market to different target audiences' quality of life aspirations.

Chinese consumers across all walks of life are already actively climbing towards a higher quality of life. Their pursuit is achieved through the consumption of goods, services, and experiences, creating huge growth opportunities for marketers to capture. Yet, brands that fail to acknowledge and appeal to consumers' varied aspirations will find themselves lagging behind. Hence, it's imperative to develop a clear strategy to answer the question: **How will your brand accompany and support consumers on their ascent towards higher quality of life?**

**Let's get started!**



mediacom

# the bigger picture

Seeing the bigger picture means that we help our clients look beyond the boundaries of traditional media to uncover new ideas and unlock growth. We challenge conventional thinking to build, optimise and drive our clients' businesses forward at scale, as well as leading our industry in critical areas such as diversity, inclusion, and sustainability.

At MediaCom China we are committed to sharing thorough yet practical thought leadership with the industry. We aim to inspire marketers in China and around the world through provocative perspectives, unexpected insights and actionable advice from MediaCom experts.

Keep an eye out for upcoming editions and events as well as a wealth of past publications on our website and WeChat official account.

Keen to discuss how MediaCom can help your brands grow?

## Get in touch

### Bonnie Hu

Communications Planning Director  
[bonnie.hu@mediacom.com](mailto:bonnie.hu@mediacom.com)

### Meha Verghese

Growth & Innovation Lead  
[meha.verghese@mediacom.com](mailto:meha.verghese@mediacom.com)



## Follow us on WeChat

Scan to follow  
MediaCom China

### MediaCom China

Shanghai 21F, WPP Campus, 399 Hengfeng Rd,  
JingAn District, Shanghai 200070  
+86(21) 2307 7788  
[mediacom.com](http://mediacom.com)  
[linkedin.com/company/mediacom](https://linkedin.com/company/mediacom)