

中国市场概览 China Market Overview



People

Summary :

- 90s generation has great connection with Internet. 90s are aborigines of Internet which presents their life style, social capability, thinking platform, expression channel, working mode and communication fashion etc. In one word, Internet is 90s generation's past, present and future.
- 90s generation's concept of love is actually not against with public traditional concept. Their love relationship can be conservative as 80s generation who are loyal to love. However, their concept of love can also be open and tolerable. Most of them are open and understanding towards homosexuality issue.
- The consumption attitude of 90s generation is generally practical and rational. Instead of advertisement and branding, they pay more attention to quality and practicality. They are eager to have unique personality. The consumption consciousness of 90s generation is more proactive and tend to follow their hearts. They are more willing to make an attempt on accepting new brands with creativeness and personalities.

Summary :

- In terms of their occupation, 90s generation are more likely to be realists who are still chasing dreams. Most of 90s are insisting to be themselves after choosing their future career. They value their interests. Salaries, future development and interests are three critical elements in 90s choosing their career. 90s are prone to choose Internet-related job because of their connection with Internet.
- Over half of the 90s generation worship business elites, since being success is important to them. Leadership worship widely exists in 90s. Female 90s worship art pioneers, writers and entertaining stars, while male 90s are prone to worship sports idols.
- In 90s life, they cannot live without computers. To them, surfing online at home to listen to music and to watch videos is as important as sleep. In terms of mobile Internet, 90s like music APP and social APP, because music and friends are indispensable parts in their lives.

Summary :

- The 00s generation is a herd of people who use Internet earlier than the 90s. More than 1/3 of 00s children have already owned smart phones. The proportion of 00s generation who use smart phones grows with their ages. And 14-15 year-old is the watershed of smart phone using. About 40% of 14-year-old start to use their first mobile phone.
- The market segmentation of 00s generation's use of smart phones is similar to that of adults'. The top3 brands are Apple, Samsung and MI. 00s smart phone users concentrate in tier1 cities and some major tier2 cities.
- In the light of age, 00s generation prefer social APP, entertainment APP and game APP. They not only proactively and independently collect information on APP, but acquire APP info. from their peer.
- Compare to other generations, 00s prefer to use QQ. Commonly, 00s first come into contact with QQ and later switch to WeChat when they are in their junior or senior high school years.

Summary :

- 00s generation prefer to record their personal life when they are using QQ and WeChat. Hence, they value and wish to have privacy and independency.
- Compare to other generation, 00s generation prefer 'non-mainstream'. They tend to experiment and try new and niche APPs which are ranked TOP1000.
- Most of 80s have stepped into society, and they relatively have stronger career ambition. In contrast, 90s generation are in relatively easier living condition in which their working and living pressure are still weak.
- To 80s generation, they shop what they 'like'. They will not necessarily shop famous brands or cheap stuff. However, 90s generation have international understanding to brands.

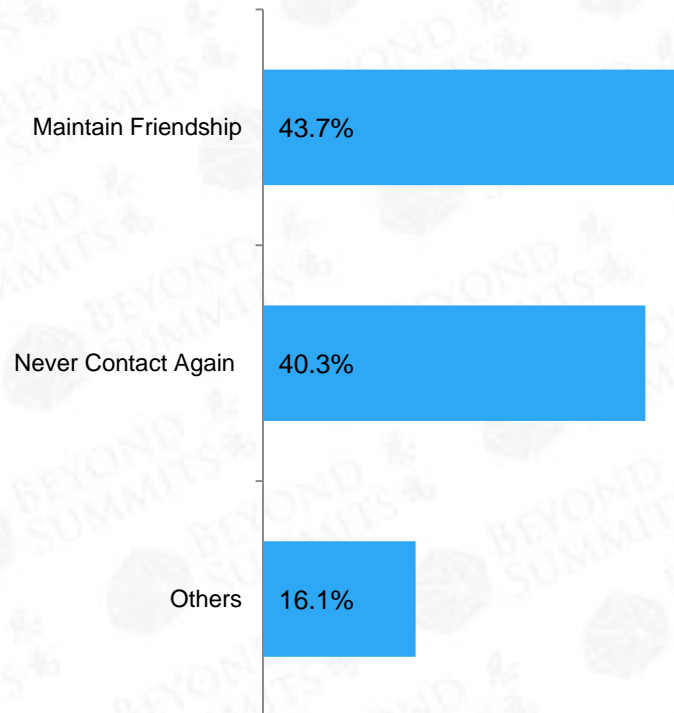
Summary :

- Both 80s and 90s generations like to be homebodies who are fans of entertainment news. But 80s generations also prefer to be informed of social, political and life news.
- Both 80s and 90s generations like to shop what they like. But 80s generations are more rational in brand's price and reputation. In choosing career, 80s generation emphasizes on salaries and future development while 90s generation's choices are mostly interest-driven.
- Generally, with increasing age and experience, every generation will more likely to be resemble to the last generation in interests and behavior. Comparatively speaking, younger people advocate freedom, independency and self-consciousness.

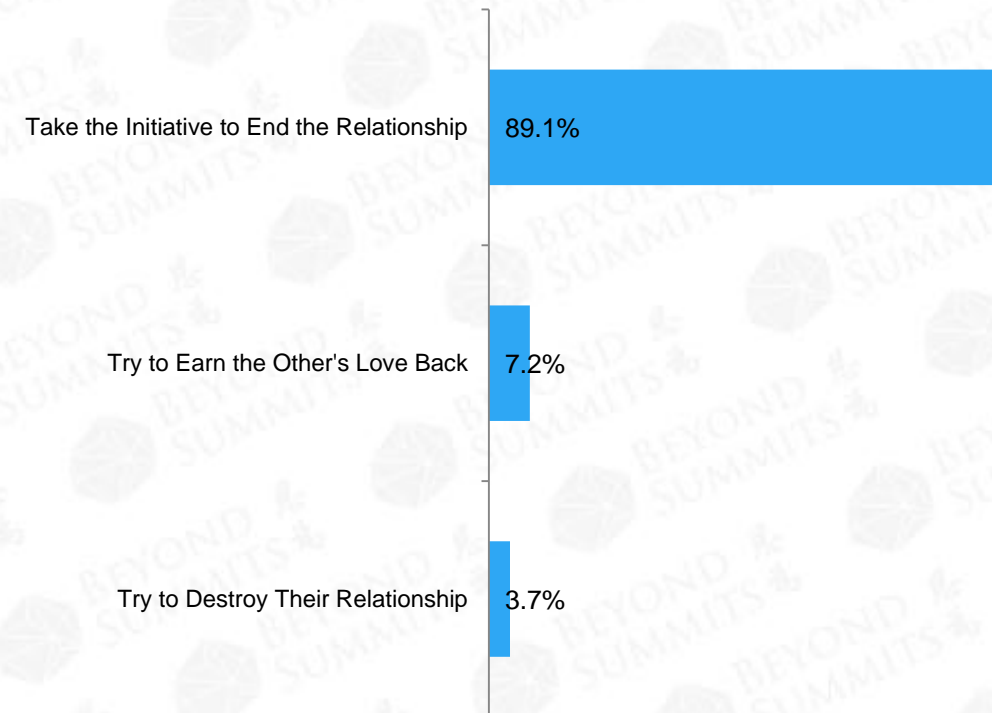
90s

90s view love in conservative attitude. No further romantic behaviors with the ex after breaking up. They will directly end the relationship if finding the lover is cheating on them.

90s' Preferred Ways of Treating the Ex After Breaking up (2014)



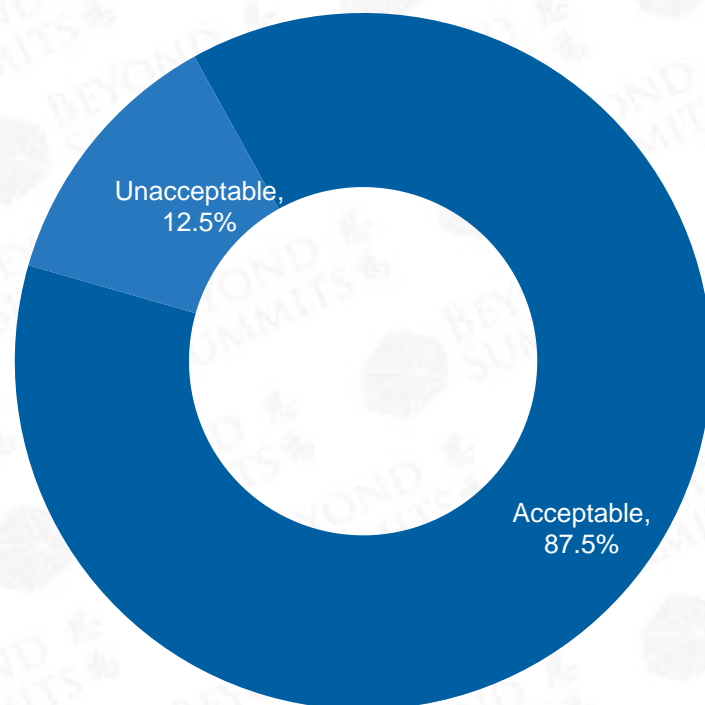
90s' Countermeasures if They Find Lover Is Cheating (2014)



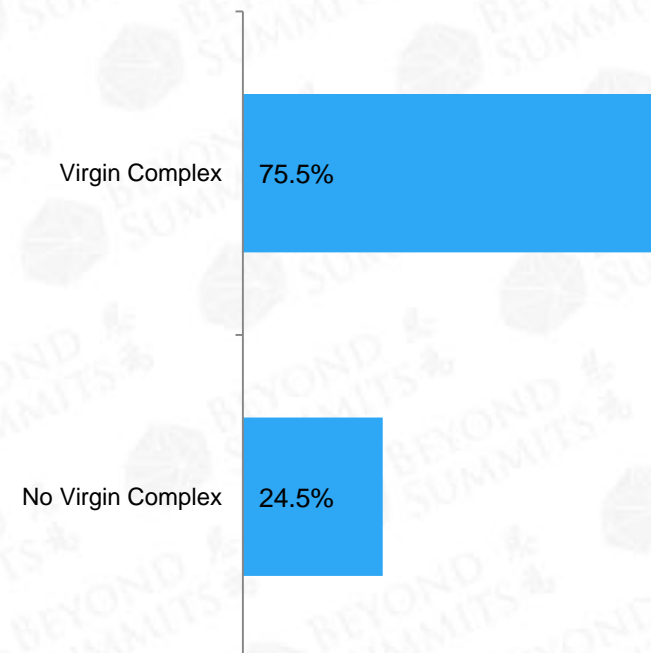
Source : Baidu *Insight into 90s*

90s' view of love: cherish virgins and show no discrimination against homosexuality.

90s' Attitudes Towards Homosexuality(2014)



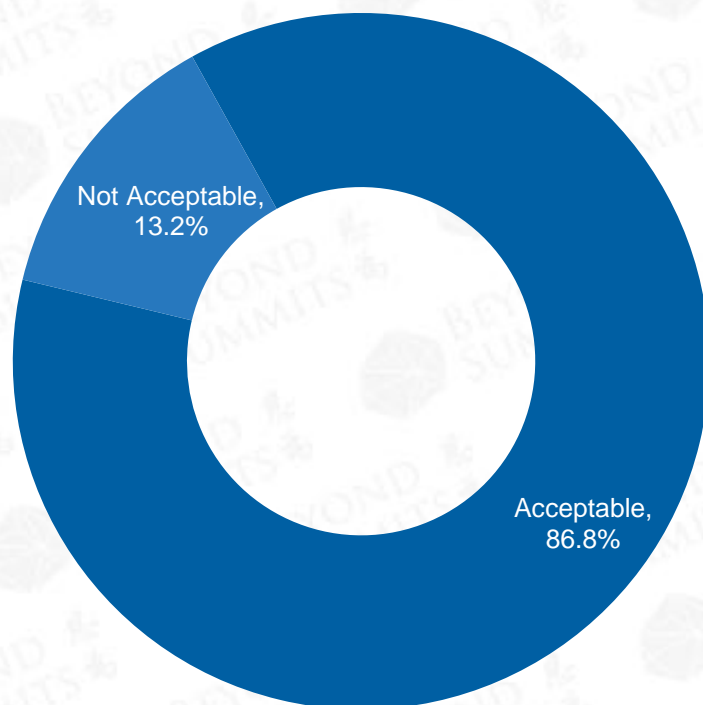
90s' Attitudes Towards Virgins(2014)



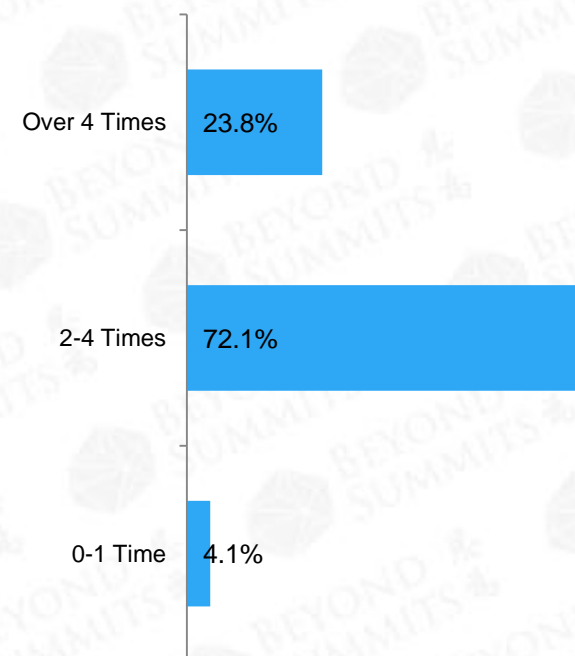
Source : Baidu *Insight into 90s*

90s' view of love: Ideal love never occurs in a real life.

Whether 90s Are Willing to Fall in Love with Only One Person in the Life(2014)



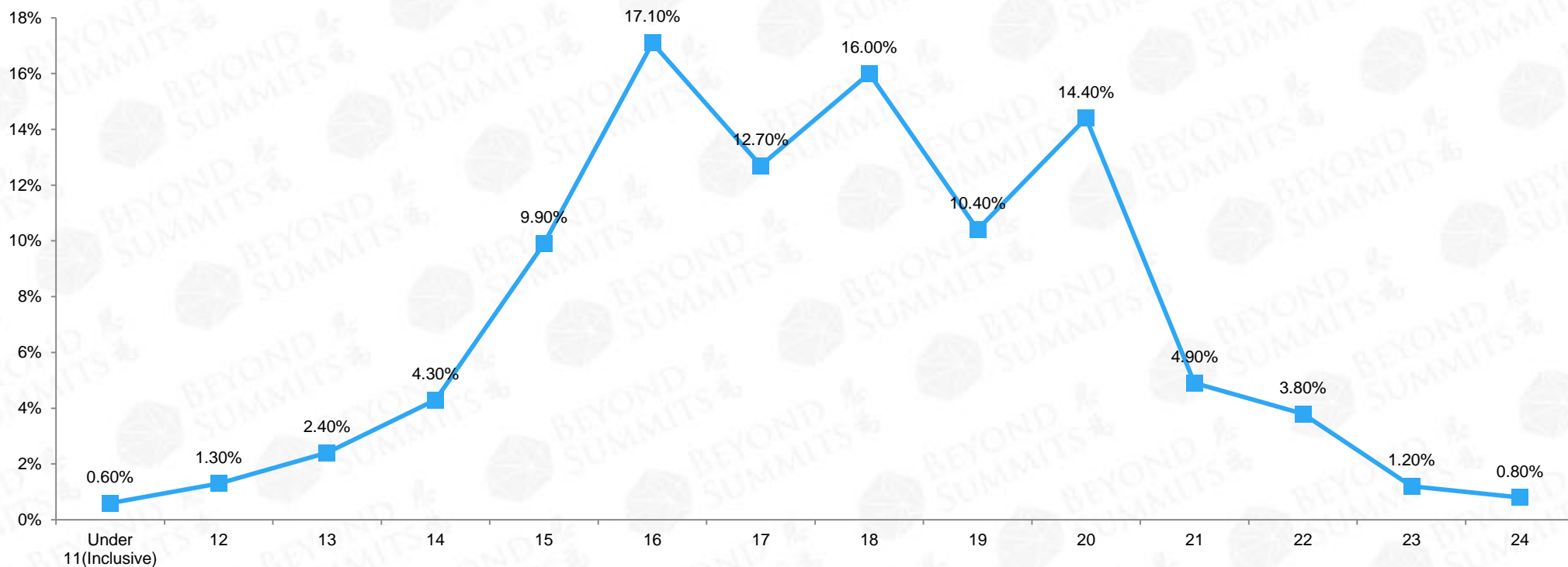
Times of 90s' Being in Love(2014)



Source : Baidu *Insight into 90s*

Most of 90s first fall in love when they are 16-20 years old, and very few 90s has never been in love before 20.

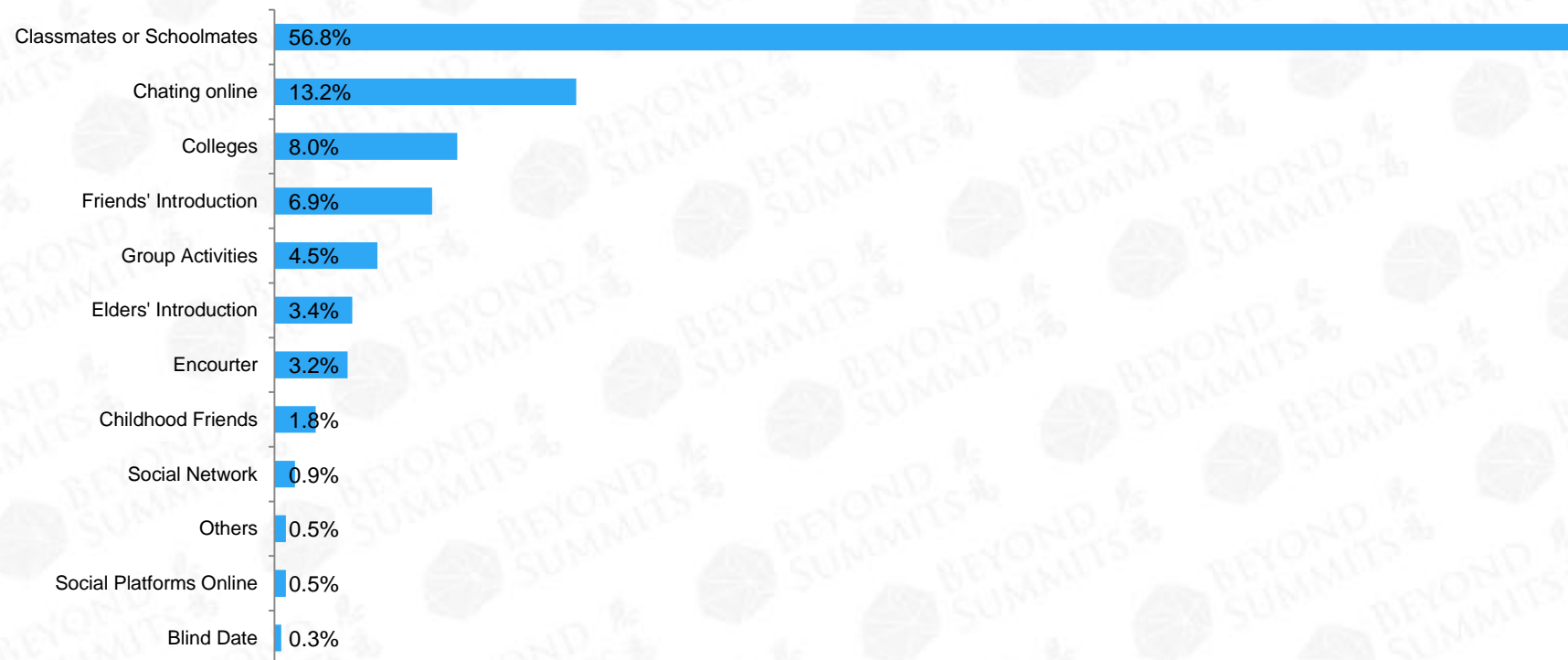
90s' First Love Age(2015)



Source : Series Research on 90s, Media and Marketing Research Center, Peking University

Schools are the most common places where 90s encounter their love.

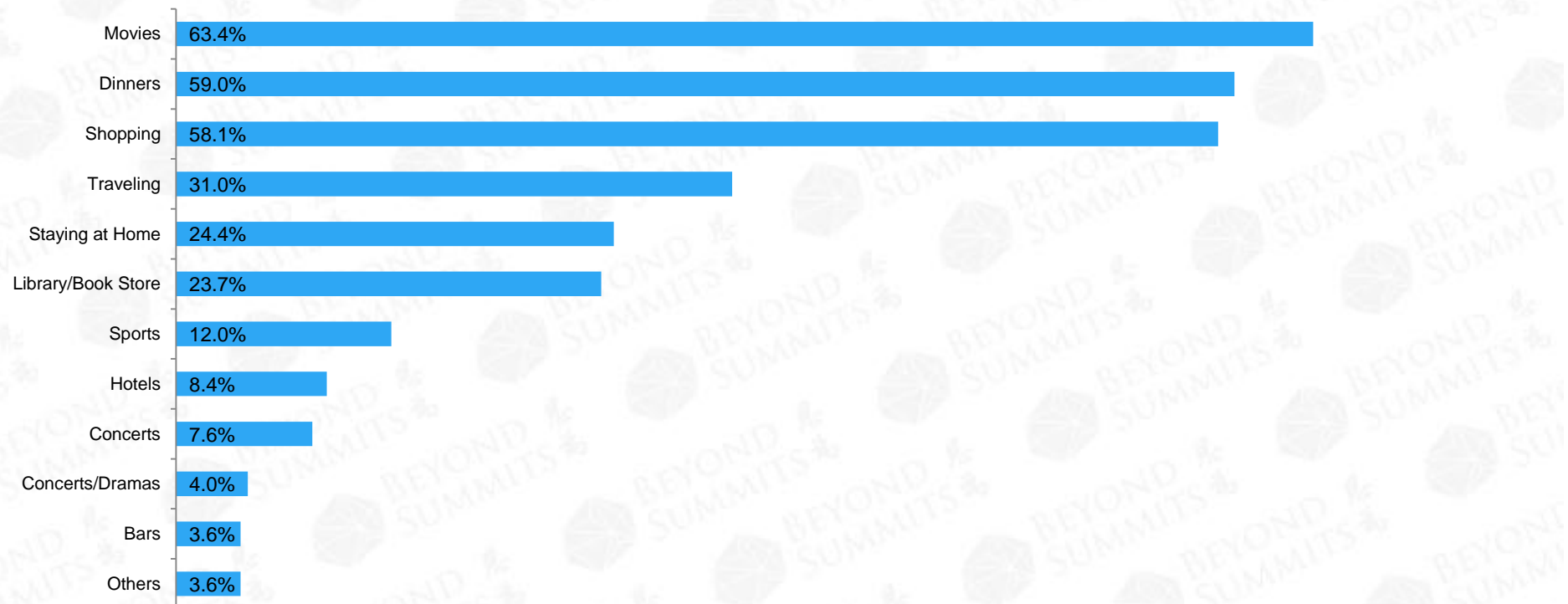
How 90s Get to Know the Lover(2015)



Source : Series Research on 90s, Media and Marketing Research Center, Peking University

90s' love to date in the 3 traditional ways: movies, dinners and shopping.

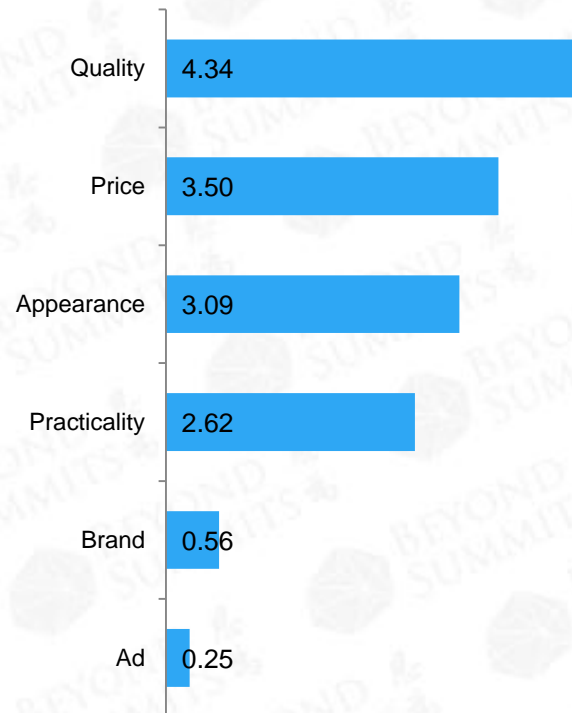
How 90s Date with the Lover(2015)



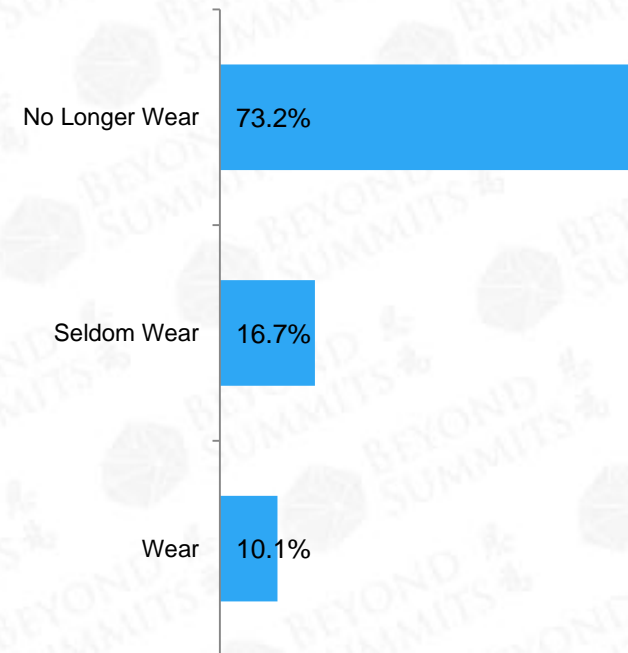
Source : Series Research on 90s, Media and Marketing Research Center, Peking University

90s'consumption view: Practical and rational. Compared with ads and brands, they value quality more. They highlight personality and refuse any copycat.

What 90s Value Most when Purchasing Goods(2014)
(5 Mark)



90s'Attitudes if Their Outfits Clash with Someone
Else's(2014)



Source : Baidu *Insight into 90s*

Most 90s' consumption can be classified as practical consumption. Items such as concerts, sports events and cars, have the largest share in 90s' unscheduled consumption, with consumption on traveling, clothing and shoes ranking the second.

	Clothing & Shoes	Books	Beauty Products	Digital Products	Food & Beverage	Home Furnishing & Textiles	Household Appliances & Kitchenware	Jewel	Health Care	Cases & Leather ware	Sports/ Outdoor	Cars	Traveling	Concerts	Sports Events
Practical Consumption	56.0%	53.6%	47.4%	56.5%	57.5%	55.9%	56.4%	44.3%	36.4%	40.9%	50.9%	44.2%	55.7%	37.5%	23.8%
Scheduled Consumption	33.9%	37.7%	35.8%	37.1%	37.1%	35.3%	41.0%	41.0%	36.4%	38.6%	42.1%	27.9%	31.5%	34.4%	23.8%
Economical Consumption	32.4%	46.4%	29.2%	33.4%	40.1%	41.2%	33.3%	32.8%	42.4%	27.3%	42.1%	37.2%	27.5%	21.9%	14.3%
Unscheduled Consumption	34.2%	26.5%	35.0%	27.5%	33.5%	32.4%	28.2%	31.1%	27.3%	29.5%	26.3%	44.2%	45.0%	43.8%	42.9%
Hedonic Consumption	20.5%	15.2%	27.7%	27.0%	20.9%	14.7%	17.9%	31.1%	24.2%	25.0%	21.1%	25.6%	24.2%	34.4%	42.9%
Impulsive Consumption	19.1%	9.9%	23.7%	18.4%	14.6%	20.6%	12.8%	8.2%	33.3%	31.8%	14.0%	20.9%	12.8%	21.9%	14.3%
Conformable Consumption	9.8%	6.0%	9.9%	9.3%	8.5%	14.7%	5.1%	13.1%	9.1%	9.1%	3.5%	16.3%	10.1%	6.3%	19.0%
Excessive Consumption	7.3%	4.0%	7.3%	7.1%	5.2%	11.8%	7.7%	16.4%	6.1%	11.4%	5.3%	18.6%	4.7%	12.5%	14.3%

Source : Series Research on 90s, Media and Marketing Research Center, Peking University

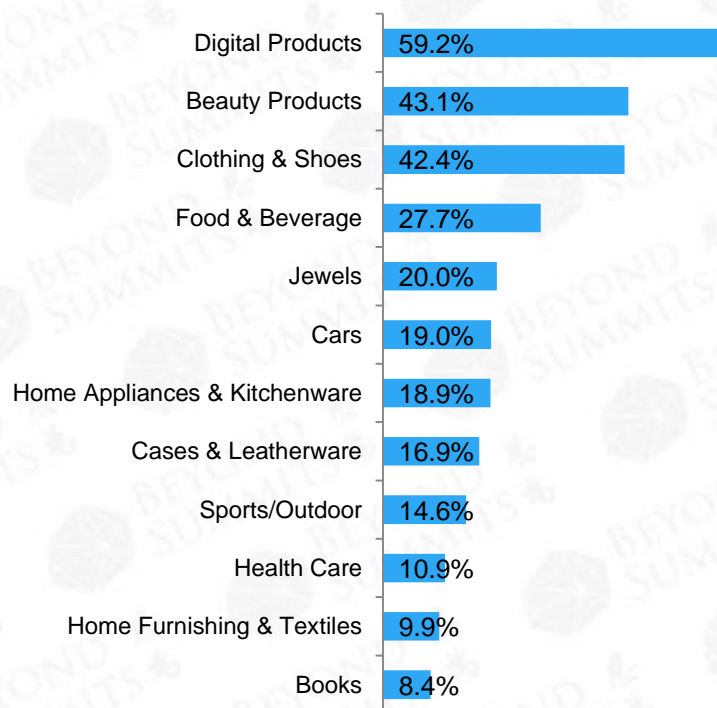
90s with a relative high consumption(over 2500 RMB per month) are hedonists while those with a monthly consumption of below 2500 RMB would rather spend their money on practical goods.

	Below 500 RMB	500-1000 RMB	1000-1200 RMB	1200—1500 RMB	1500-1800 RMB	1800-2000 RMB	2000-2500 RMB	2500-3000 RMB	3000-3500 RMB	3500-4000 RMB	4000-4500 RMB	Over 4500 RMB
Practical Consumption	58.5%	53.6%	52.1%	46.5%	42.5%	41.4%	55.4%	41.9%	53.8%	18.8%	37.5%	38.1%
Scheduled Consumption	36.2%	35.8%	35.3%	31.2%	39.7%	34.3%	28.6%	41.9%	34.6%	18.8%	56.3%	28.6%
Economical Consumption	43.9%	31.5%	29.4%	24.2%	12.3%	18.6%	21.4%	9.7%	23.1%	6.3%	12.5%	14.3%
Unscheduled Consumption	28.4%	36.0%	35.9%	33.1%	42.5%	40.0%	46.4%	54.8%	26.9%	50.0%	31.3%	33.3%
Hedonic Consumption	16.9%	22.0%	32.0%	24.2%	35.6%	40.0%	28.6%	61.3%	15.4%	25.0%	56.3%	47.6%
Impulsive Consumption	14.0%	19.5%	18.8%	19.7%	30.1%	25.7%	23.2%	9.7%	26.9%	25.0%	25.0%	28.6%
Conformable Consumption	6.8%	10.1%	9.1%	15.3%	9.6%	14.3%	14.3%	3.2%	7.7%	25.0%	31.3%	38.1%
Excessive Consumption	3.3%	7.0%	9.1%	16.6%	16.4%	12.9%	17.9%	9.7%	11.5%	12.5%	37.5%	9.5%

Source : Series Research on 90s, Media and Marketing Research Center, Peking University

90s have a preference for branded digital products, clothing, shoes and beauty products. Males prefer brands of digital products, sports, outdoor, clothing and shoes, yet females are more fond of beauty products and jewelry brands.

Brand Influence to 90s' Consumption Category(2015)

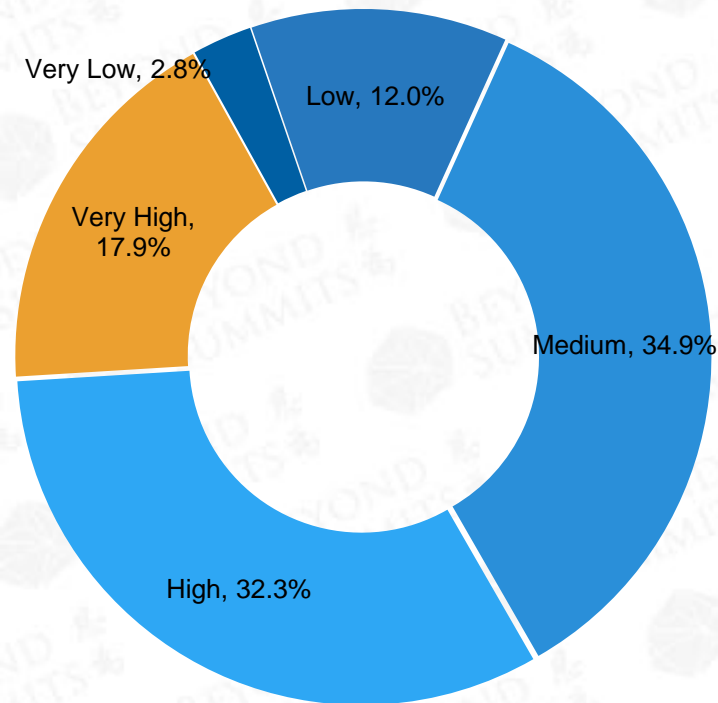


	Male	Female	Difference
Digital Products	66.2%	52.7%	13.5%
Sports/Outdoor	18.9%	10.4%	8.6%
Clothing & Shoes	46.2%	39.0%	7.2%
Books	9.5%	7.3%	2.2%
Health Care	10.9%	11.1%	-0.2%
Home Furnishing & Textiles	9.3%	10.6%	-1.3%
Home Appliances & Kitchenware	18.0%	20.0%	-2.0%
Cases & Leatherware	15.9%	18.2%	-2.3%
Food & Beverage	26.7%	29.1%	-2.3%
Jewels	16.4%	24.0%	-7.7%
Beauty Products	24.5%	62.9%	-38.4%

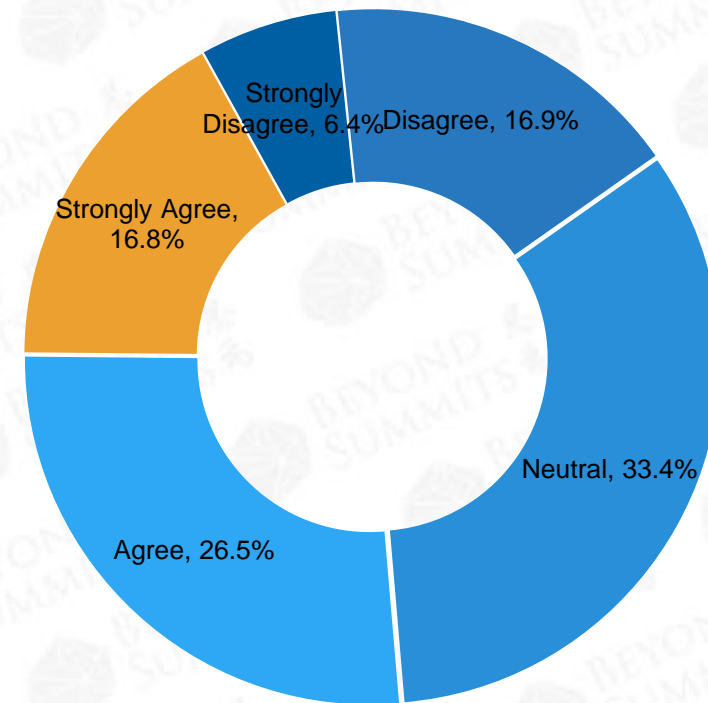
Source : Series Research on 90s, Media and Marketing Research Center, Peking University

50.2% of 90s are willing to try new products; among them, two out of ten are very eager to try. 43.3% of 90s don't have a rational consumption habit and 16.8% are particularly impulsive when purchasing goods.

90s' Acceptability to New Products(2015)



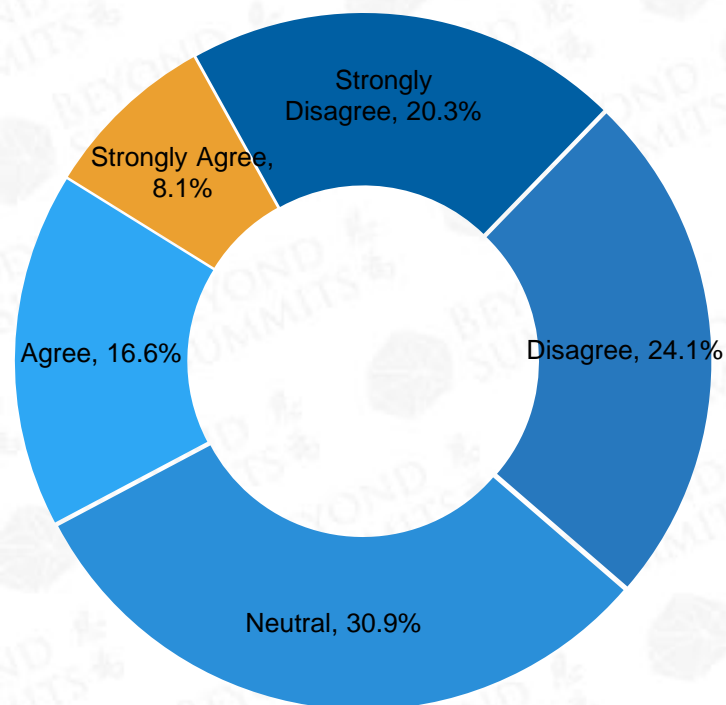
Whether 90s Agree They Have Impulsive Consumption Habits(2015)



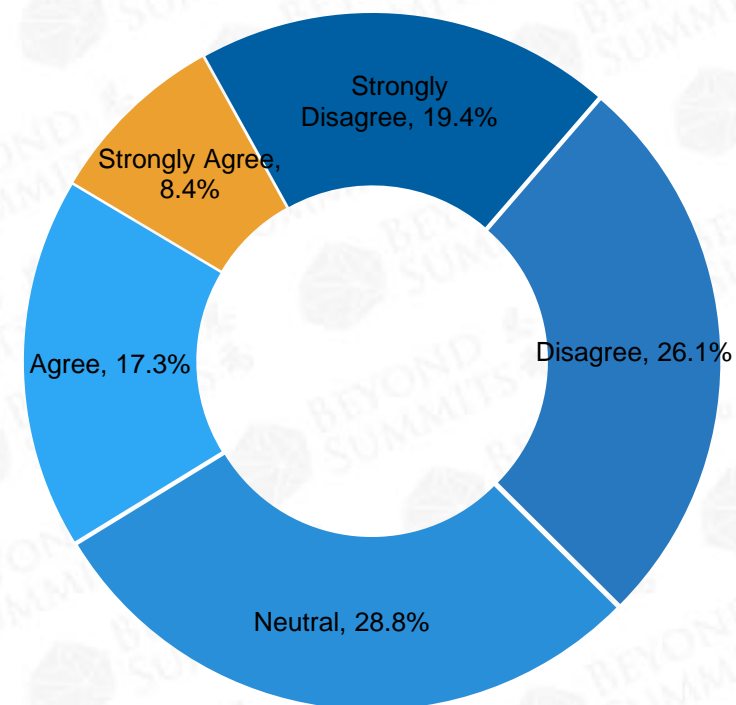
Source : Series Research on 90s, Media and Marketing Research Center, Peking University

24.7% of 90s will consider famous brands as first choices, and more males than females support this opinion. 25.7% of 90s will purchase luxuries, yet 45.4% will not.

Whether 90s Agree with the Brand-leading Consumption(2015)



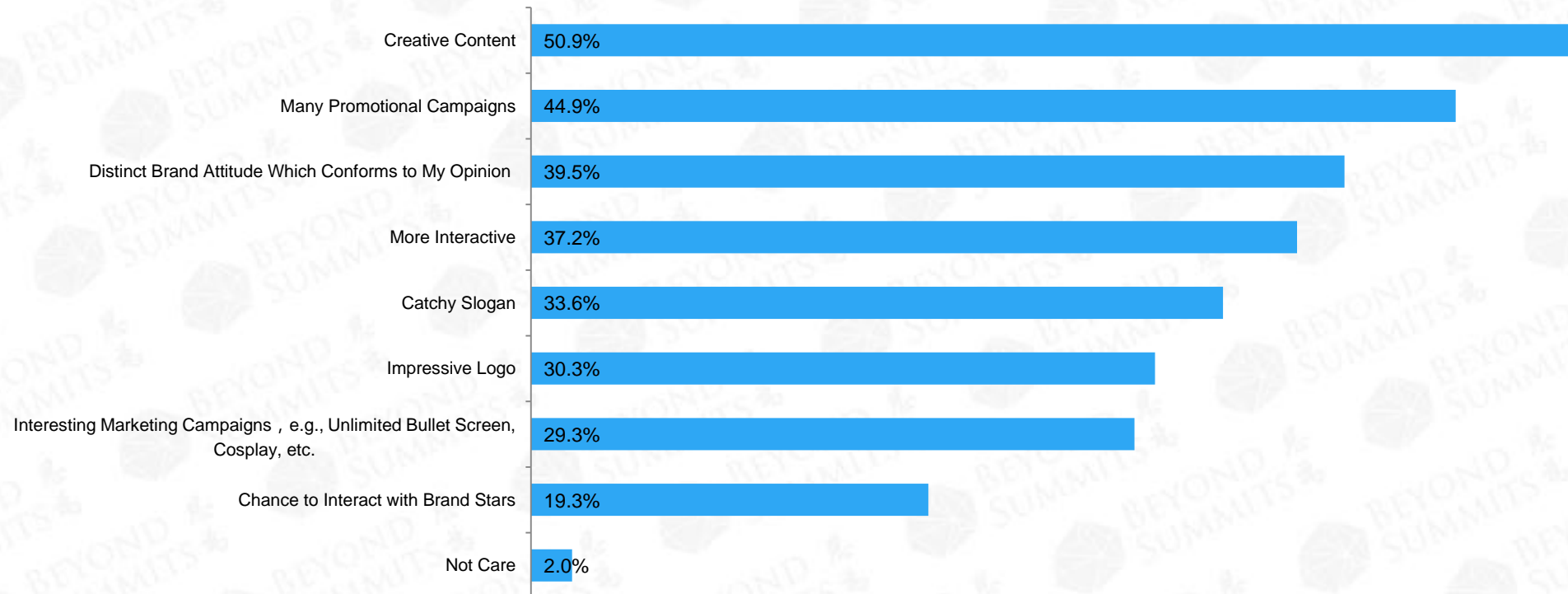
Whether 90s Agree with Luxury Consumption(2015)



Source : Series Research on 90s, Media and Marketing Research Center, Peking University

A creative ad with unique brand style that cater to 90s' tastes will be more likely to attract their interests.

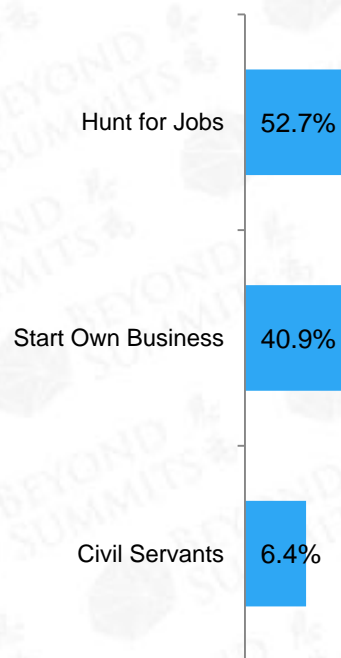
90s' Favorite Ad and Marketing Type(2015)



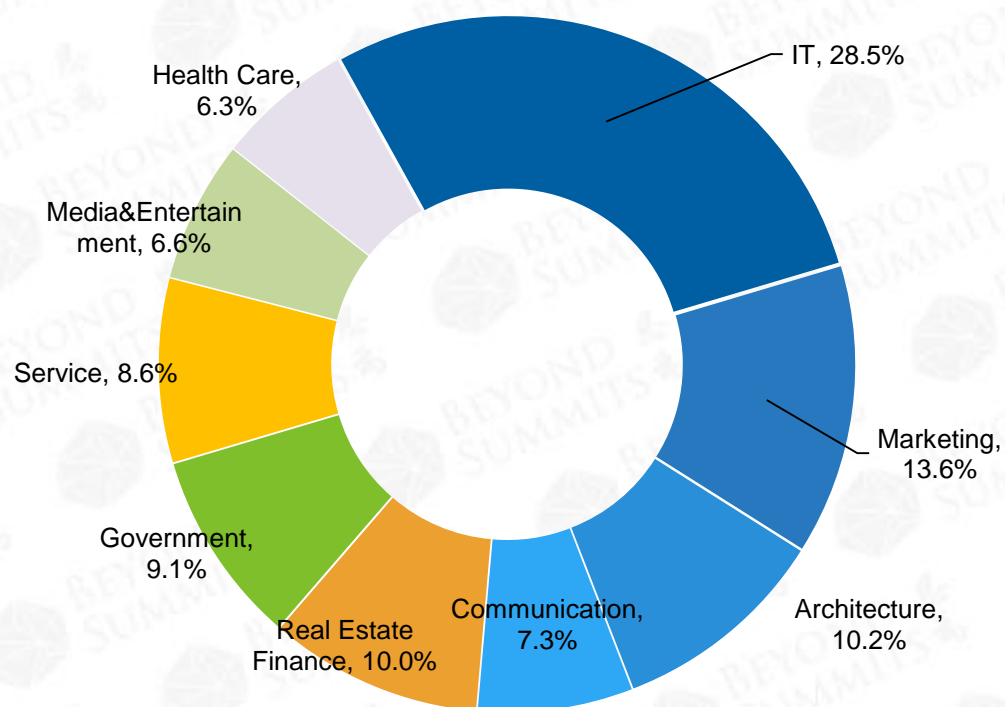
Source : Series Research on 90s, Media and Marketing Research Center, Peking University

90s' employment view: less attention to positions in public institutions, more attention to pursue ideals as a realist.

90s' Career Planning & Employment Status(2014)



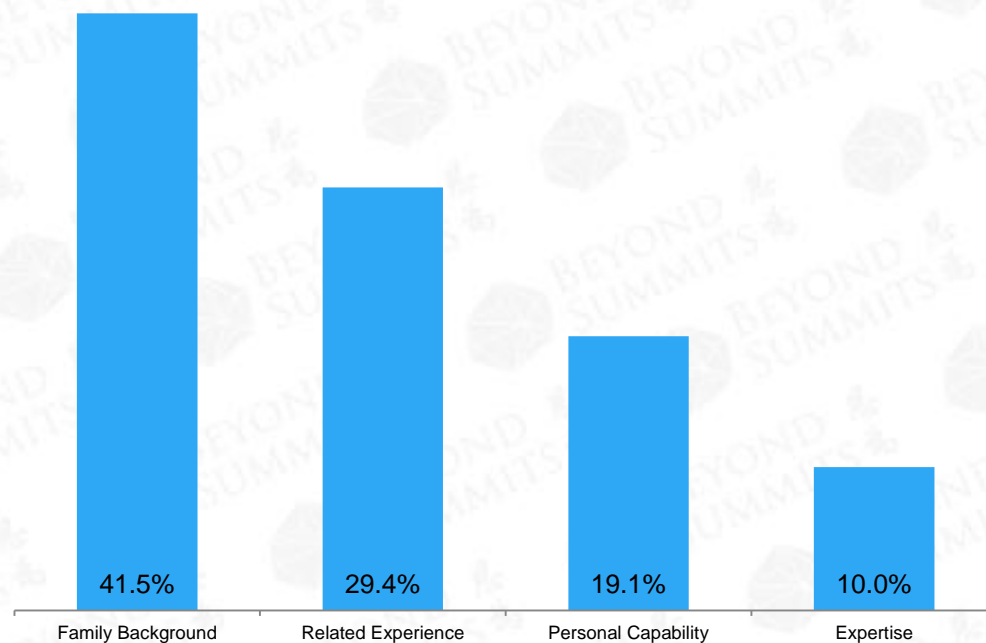
90s' Employment Structure(2014)



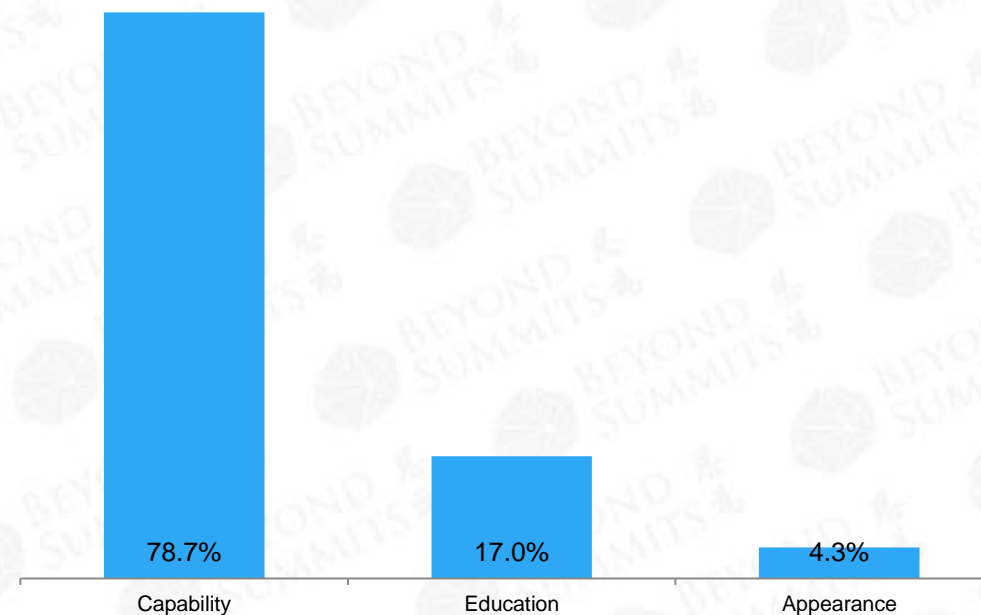
Source : Baidu *Insight into 90s*

90s' employment view: "Daddy-is-the-key" is also influencing 90s, and they agree family background is vital to employment. In their opinions, personal capabilities weigh more than education background.

Most Significant Factors for Employment in 90s' Opinions(2014)



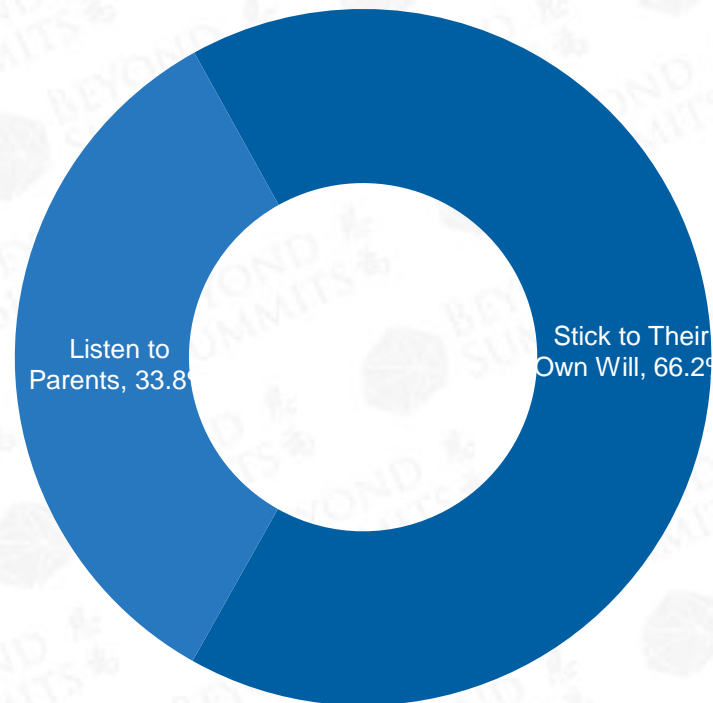
Key Factors for Losers to Win Again in 90s' Opinions(2014)



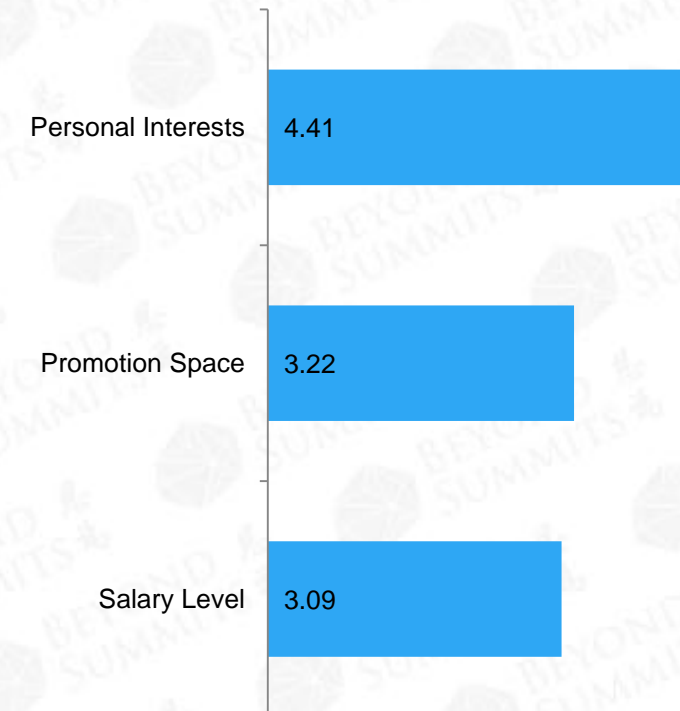
Source : Baidu *Insight into 90s*

90s' employment view: what job to choose is up to themselves. They will choose the jobs that follow their own wills and interests.

When 90s' Working Intentions Conflict with Their Parents' Expectation(2014)



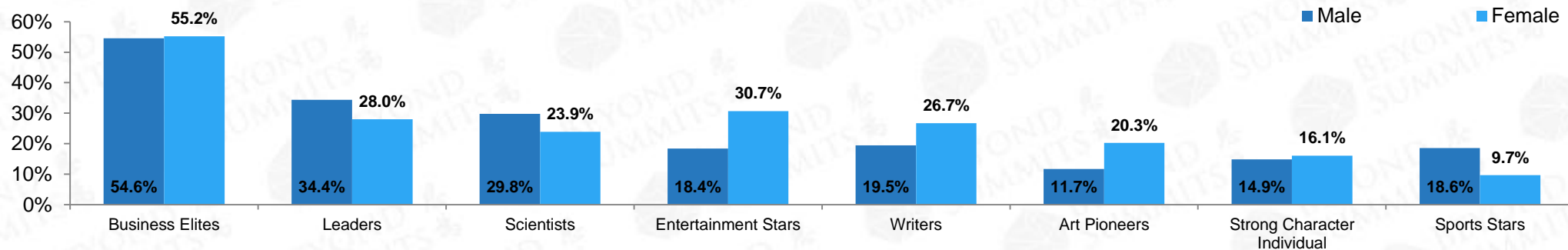
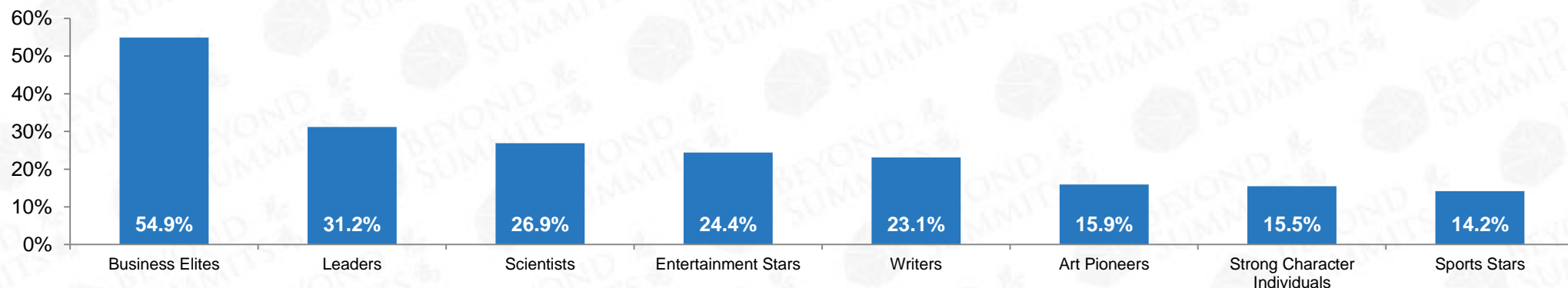
Factors 90s Value Most when Choosing Jobs(2014)(5 Mark)



Source : Baidu *Insight into 90s*

More than half of the 90s admire business elites and regard success as a target. Leadership worship still exists in 90s. Females admiring art pioneers, writers and celebrities while males admiring sports idols.

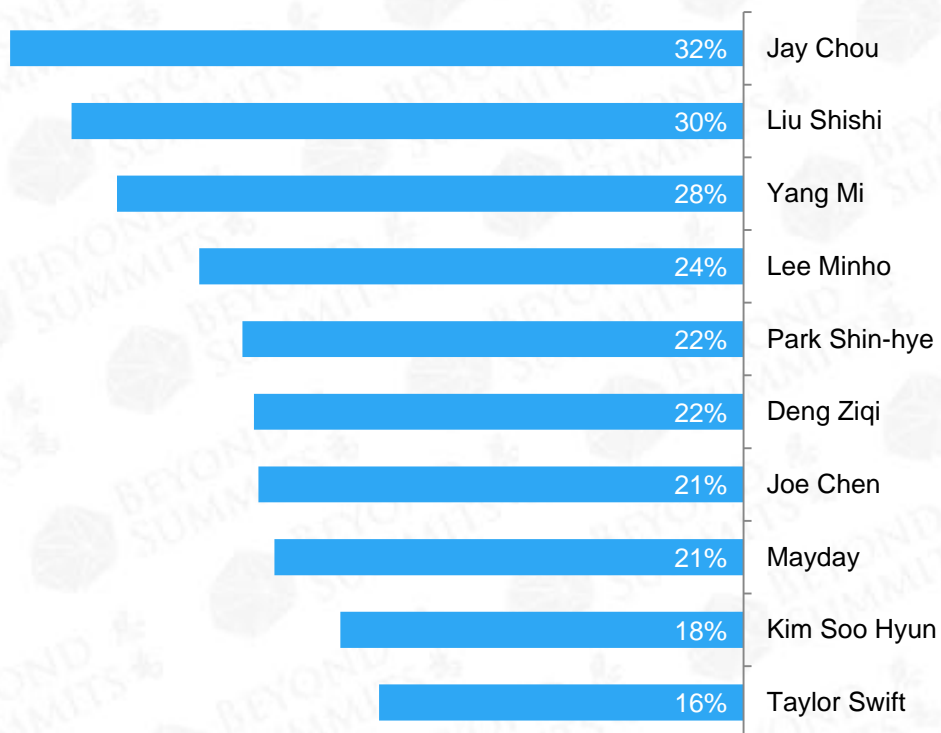
90s' Favorite Idol Type(2015)



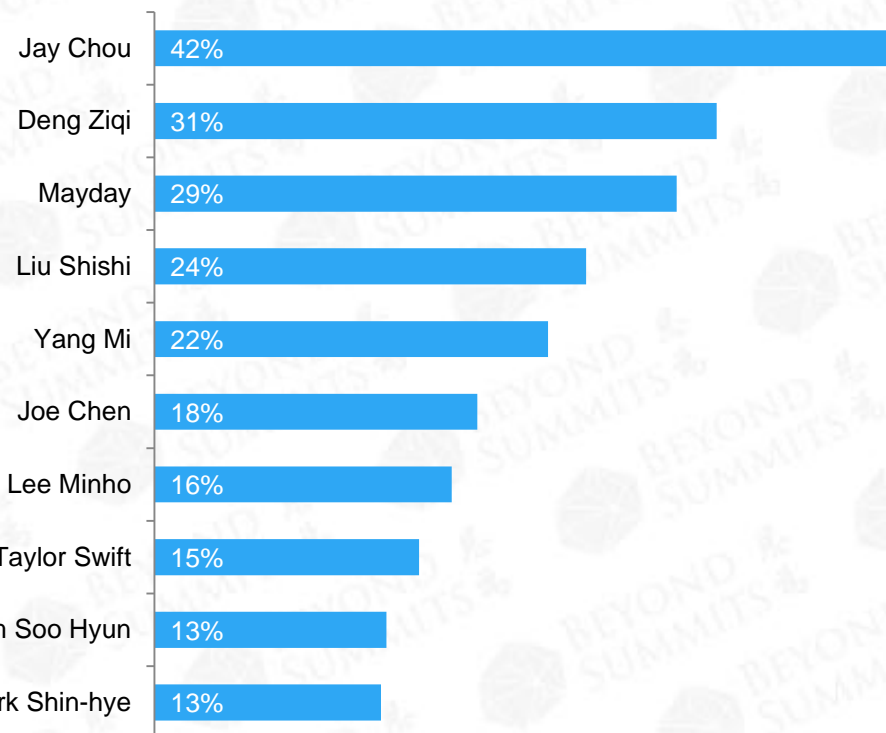
Source : Series Research on 90s, Media and Marketing Research Center, Peking University

Jay Chou, an entertainment star, is very popular among most 90s. Relatively speaking, females like Liu Shishi, Yang Mi and Korean handsome guys while males prefer Deng Ziqi and Mayday.

90s Females' Favorite Entertainment Stars



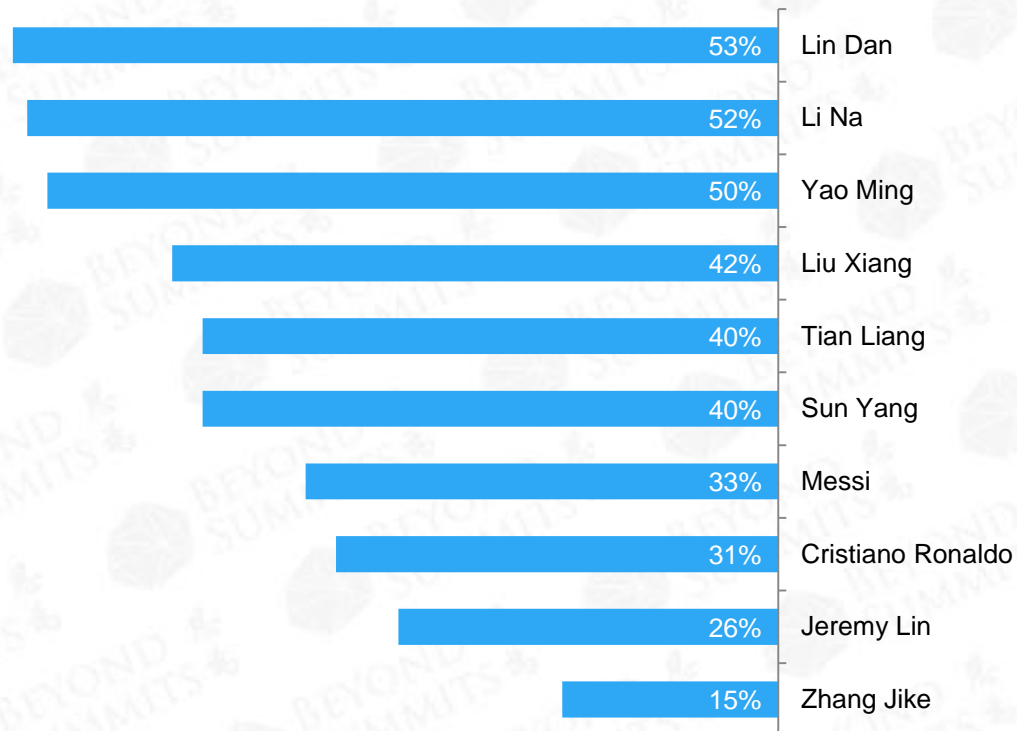
90s Males' Favorite Entertainment Stars



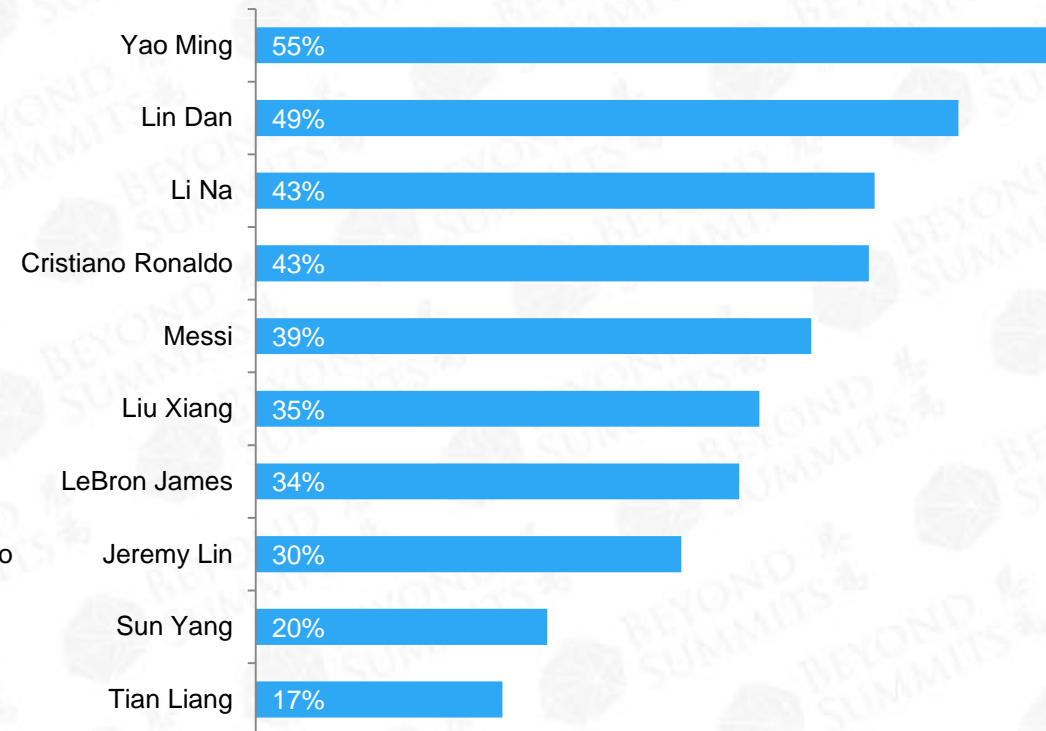
Source : Series Research on 90s, Media and Marketing Research Center, Peking University

Males of 90s prefer basketball and football stars, yet females are not into particular type, and stars they like are from various sports.

90s Females' Favorite Sports Stars



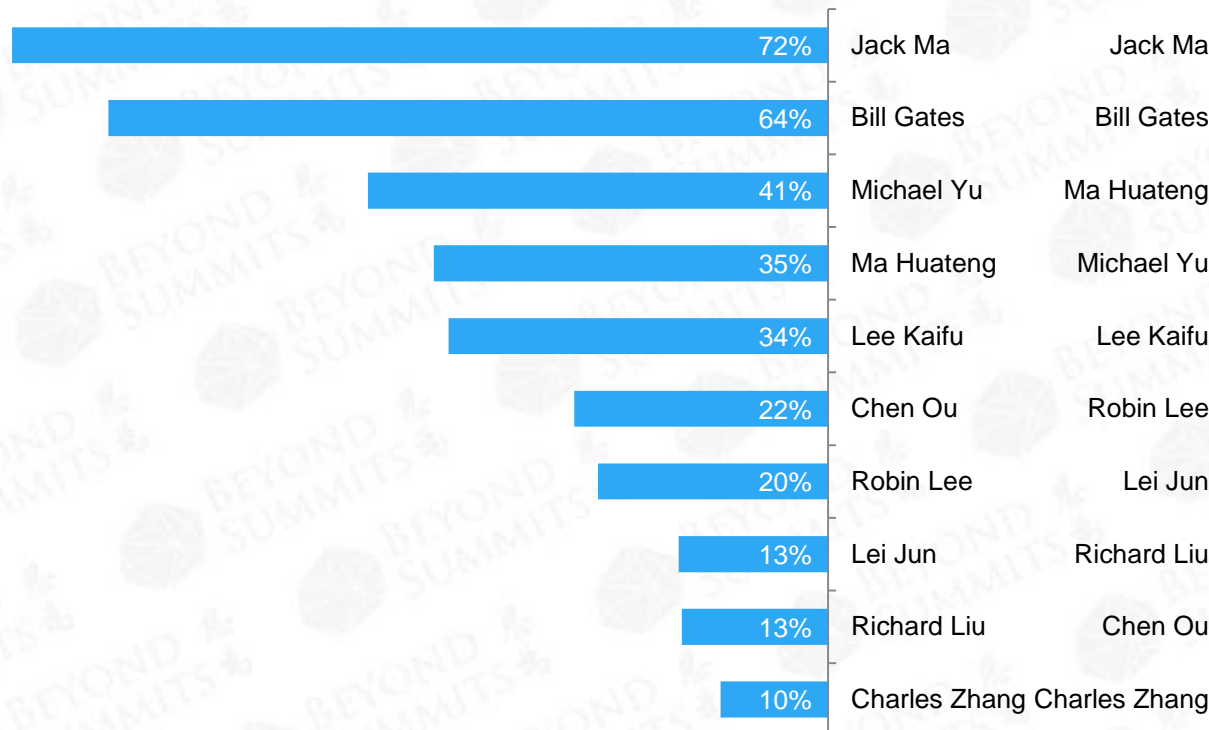
90s Males' Favorite Sports Stars



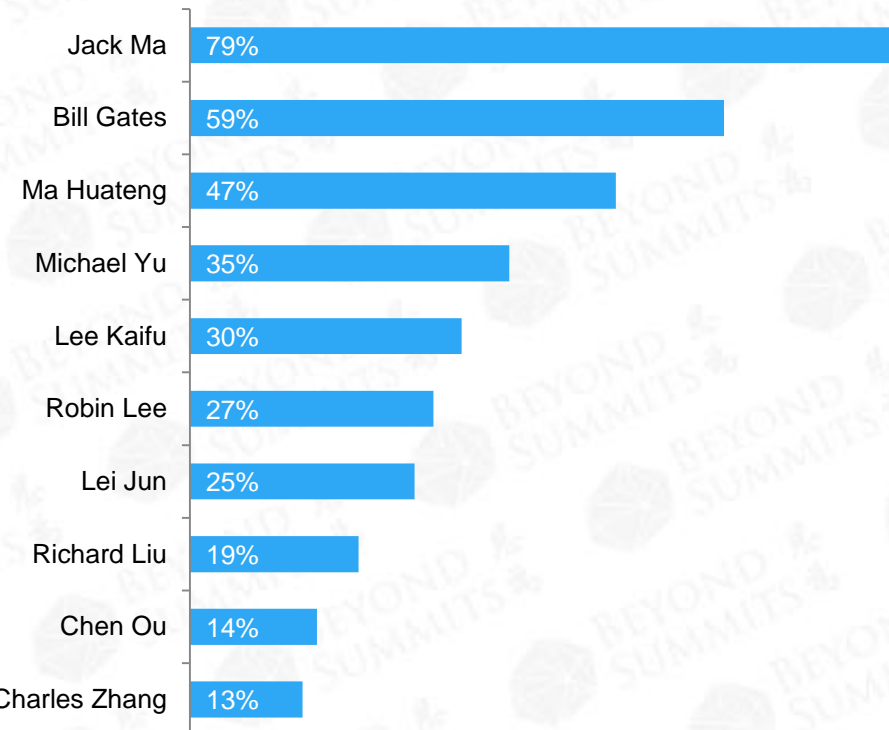
Source : Series Research on 90s, Media and Marketing Research Center, Peking University

Males of 90s like Jack Ma, Ma Huateng, Robin Lee and other Internet leaders, yet females prefer energetic elites with good affinity, such as Michael Yu, Chen Ou, etc.

90s Females' Favorite Business Elites



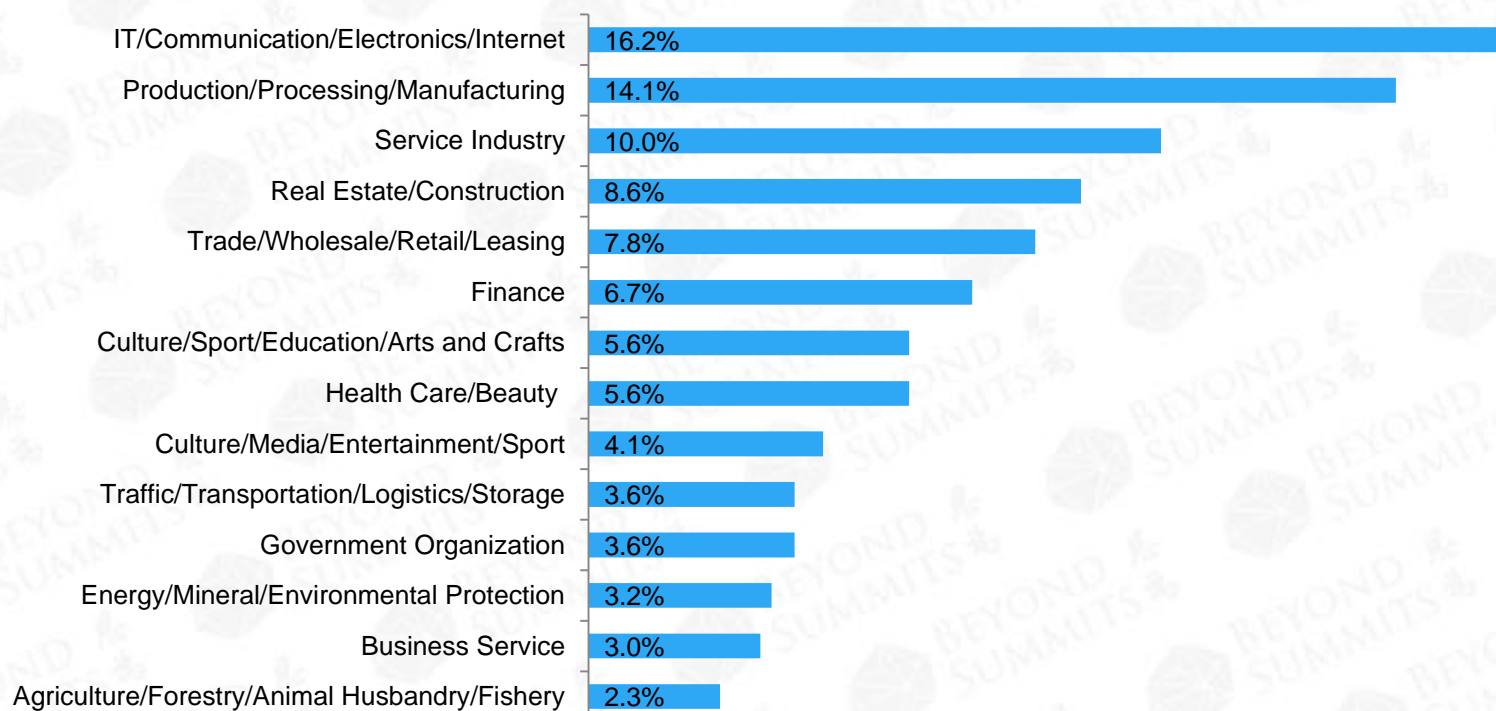
90s Males' Favorite Business Elites



Source : Series Research on 90s, Media and Marketing Research Center, Peking University

90s prefer Internet-related jobs and occupations rather than agroforestry, animal husbandry, energy or other traditional industries.

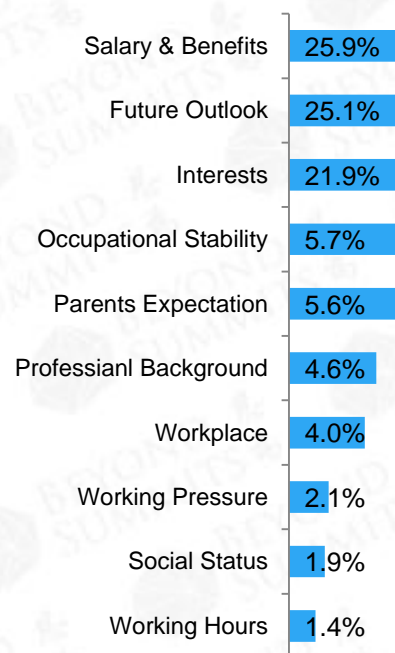
90s' Occupation Structure(2015)



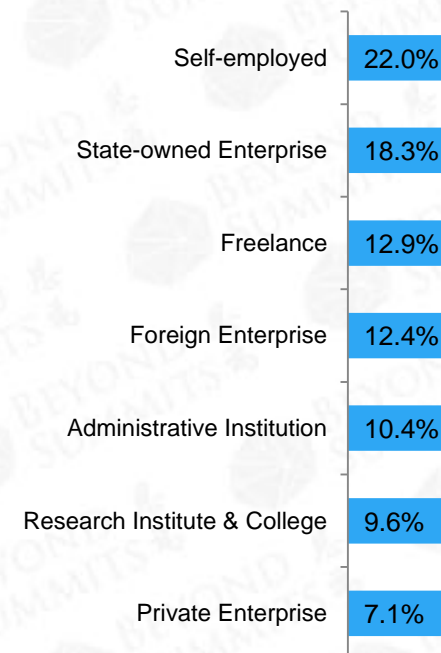
Source : Series Research on 90s, Media and Marketing Research Center, Peking University

The 3 key factors for 90s when choosing jobs are salary, future development and interests. For student groups, they would rather start their own business after graduation.

90s' Employment Drivers(2015)



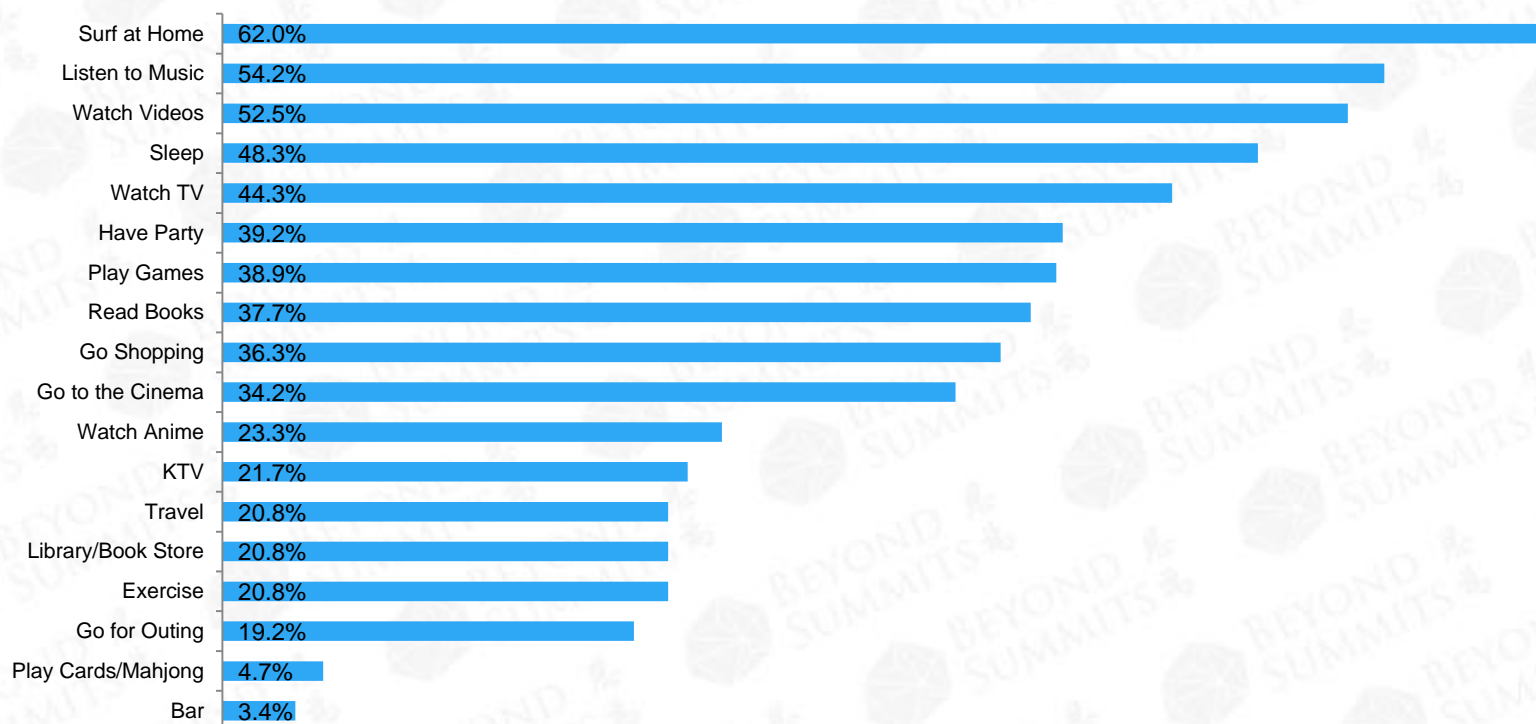
Ideal Occupations for 90s' Student Group(2015)



Source : Series Research on 90s, Media and Marketing Research Center, Peking University

90s are addicted to computer, and surfing at home is their favorite. Listening to music and watching videos via computer rank second and third favorite places respectively. Besides, they also like sleeping.

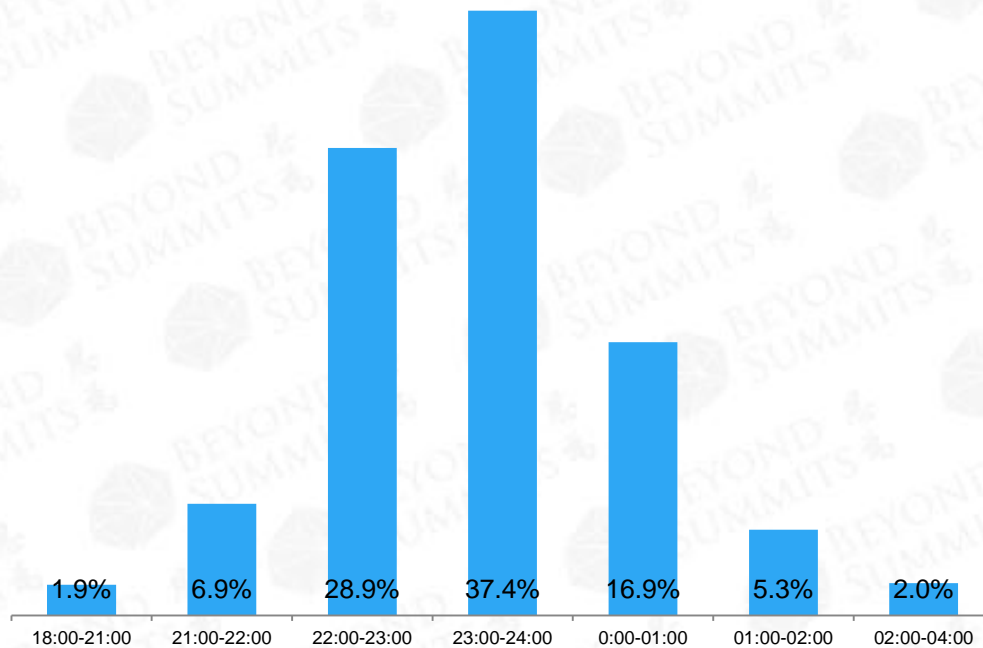
90s' Leisure and Entertainment(2015)



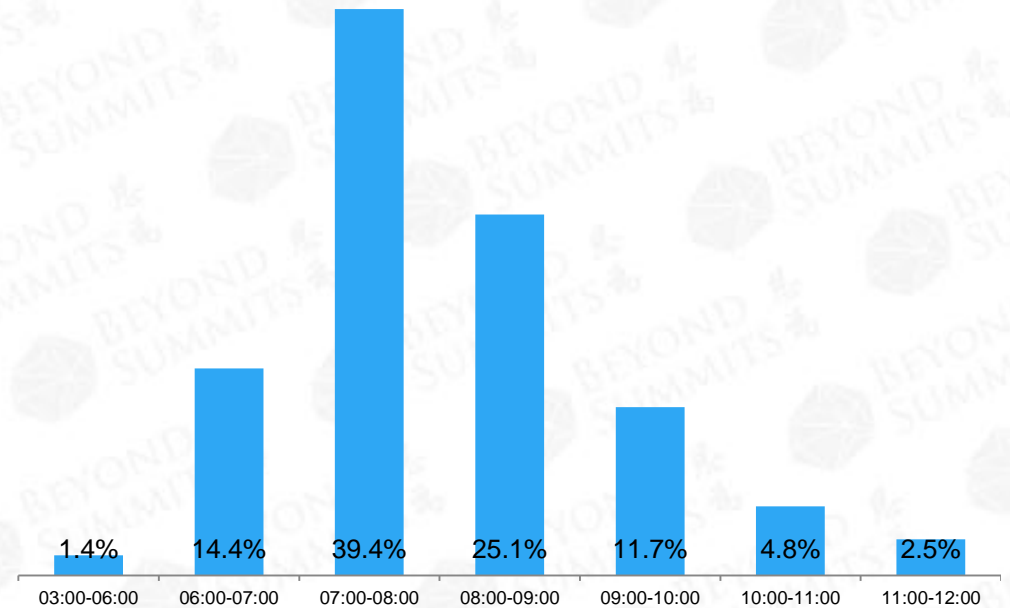
Source : Series Research on 90s, Media and Marketing Research Center, Peking University

90s stay up late and get up late. A quarter of 90s go to bed after midnight. 19% of 90s get up after 9:00 a.m.

90s' Time for Bed(2015)



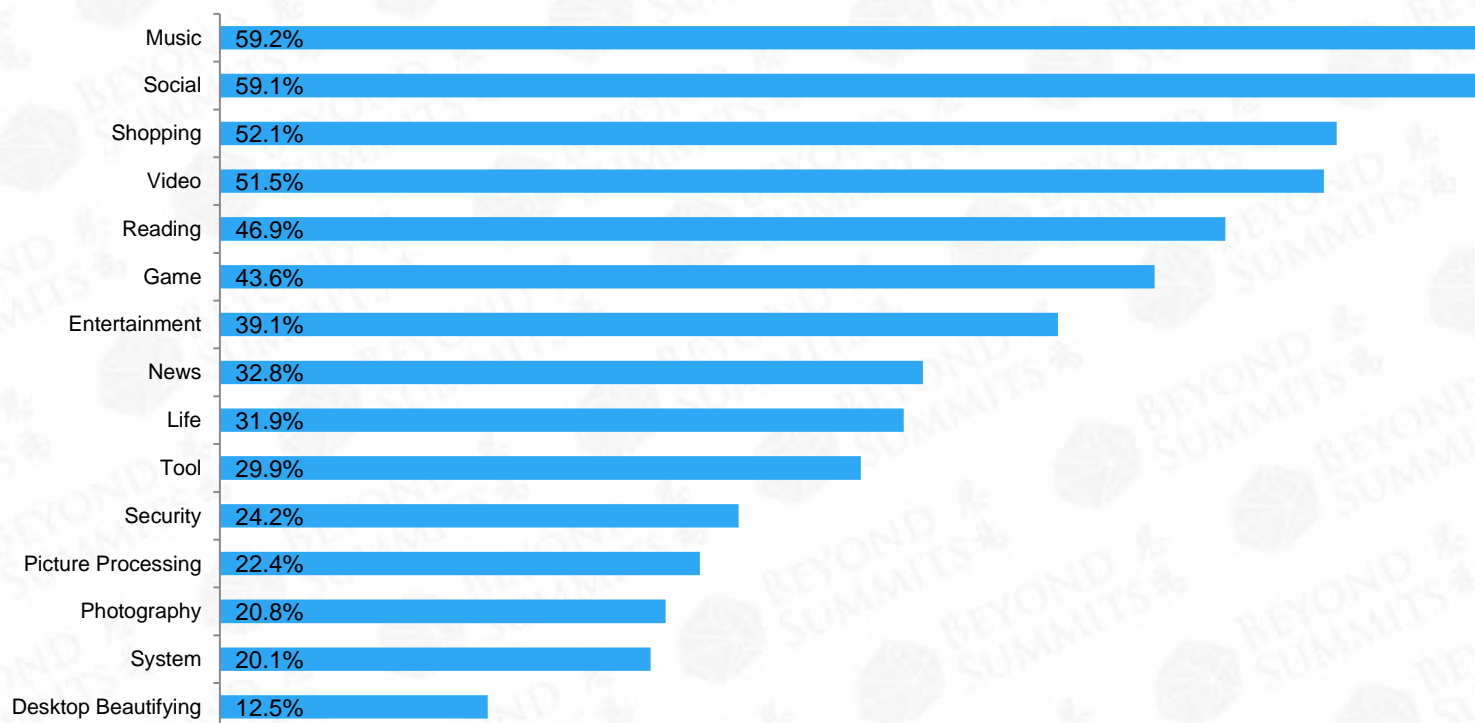
90s' Time for Getting up(2015)



Source : Series Research on 90s, Media and Marketing Research Center, Peking University

90s like music APP and social APP best. Therefore, music and friends are indispensable parts of their life.

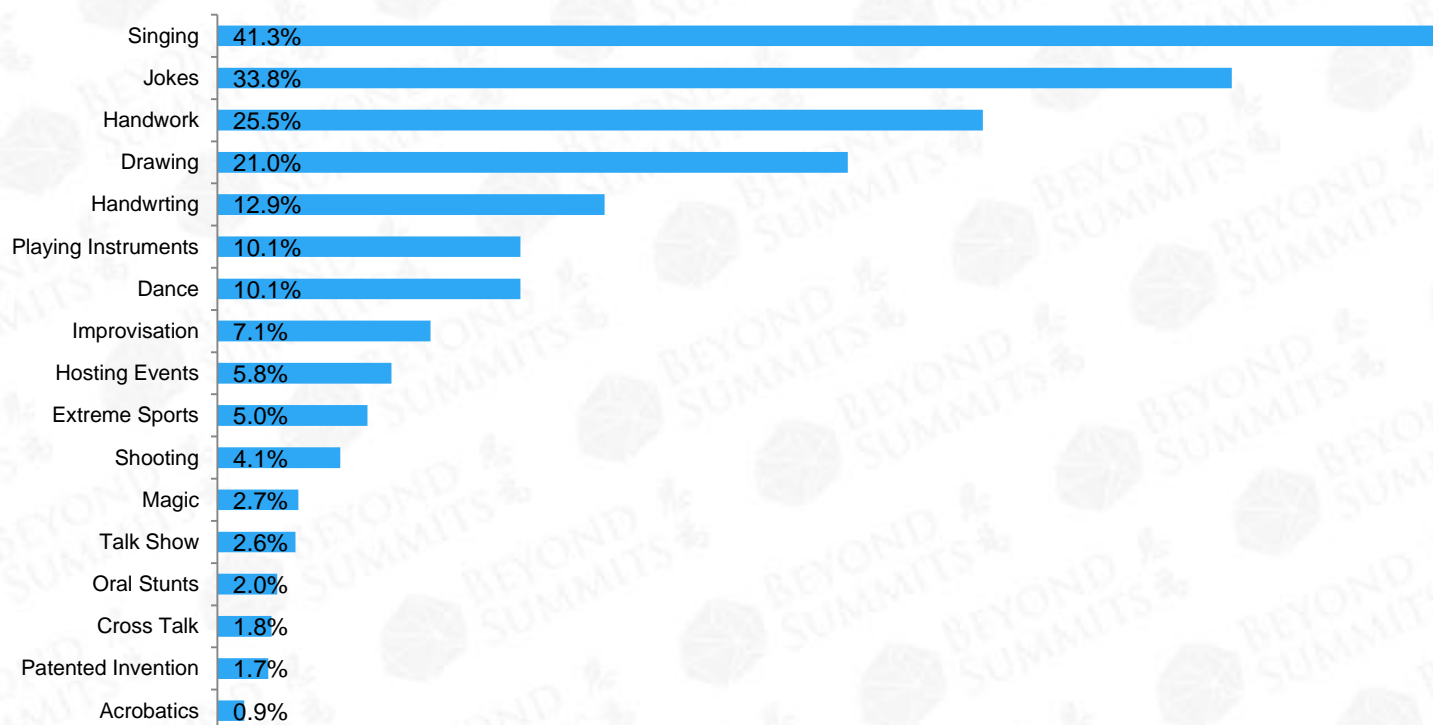
90s' Favorite APP Type(2015)



Source : Series Research on 90s, Media and Marketing Research Center, Peking University

90s enjoy listening to music and singing. Moreover, they also have features of amusing the others and making handcrafts.

90s' Skills and Specialty (2015)

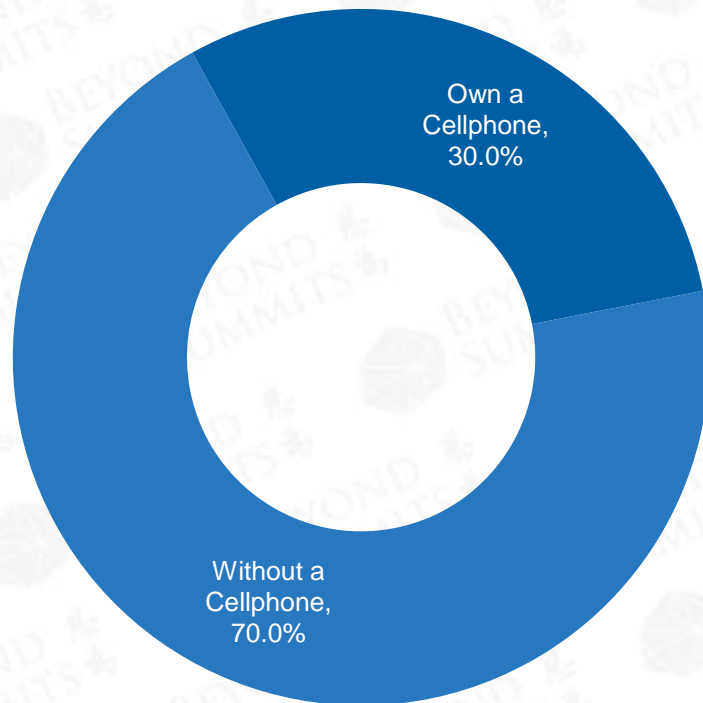


Source : Series Research on 90s, Media and Marketing Research Center, Peking University

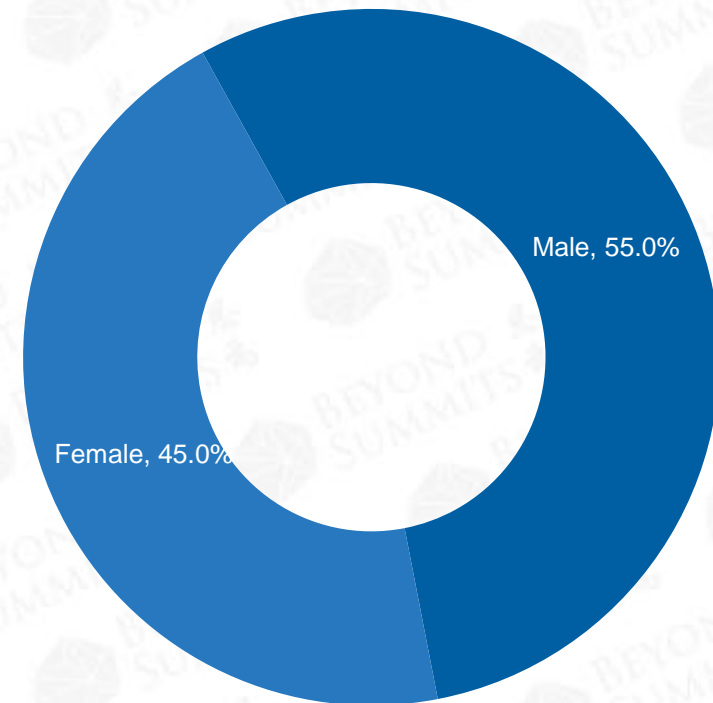
00s

Compared with 90s, 00s have early access to Internet, and over one third of the children own a smartphone, with male users slightly more than females' due to their preference for electronics.

00s' Cellphone Users(2015)



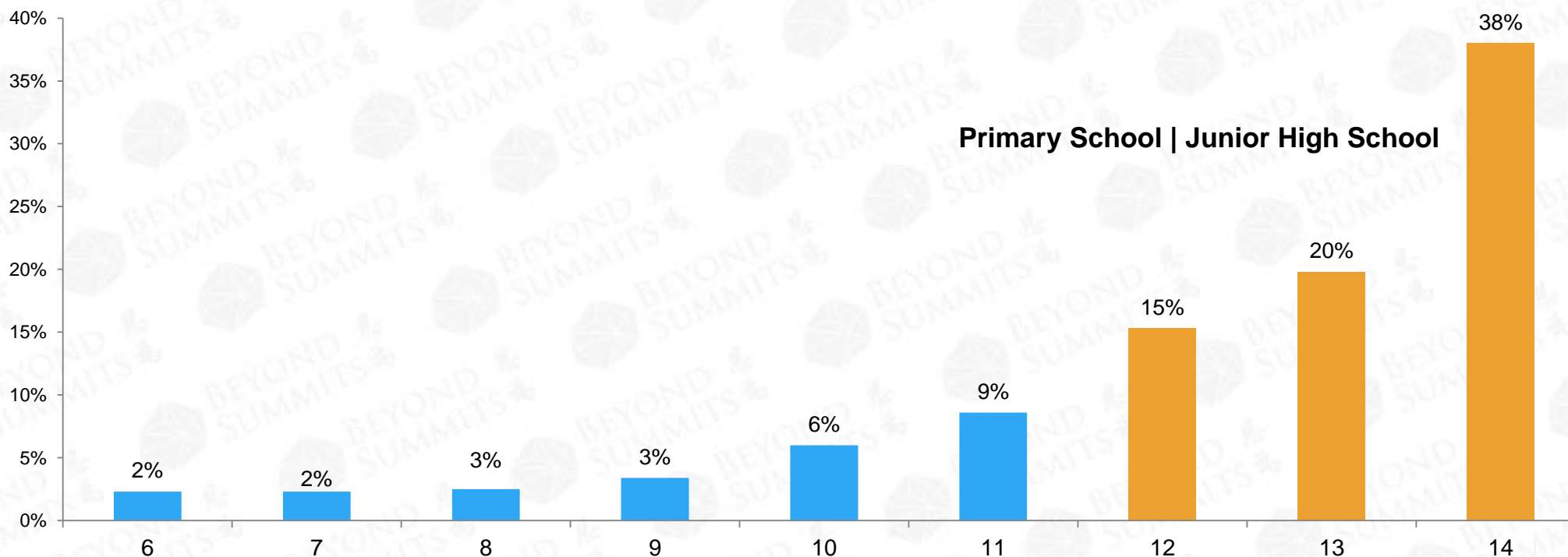
00s' Male & Female Cellphone Users(2015)



Source : Tencent *The Rise of 00s 2014*

Middle school students are the largest smartphone user group among children, and they increasingly have this rigid demand as they grow up.

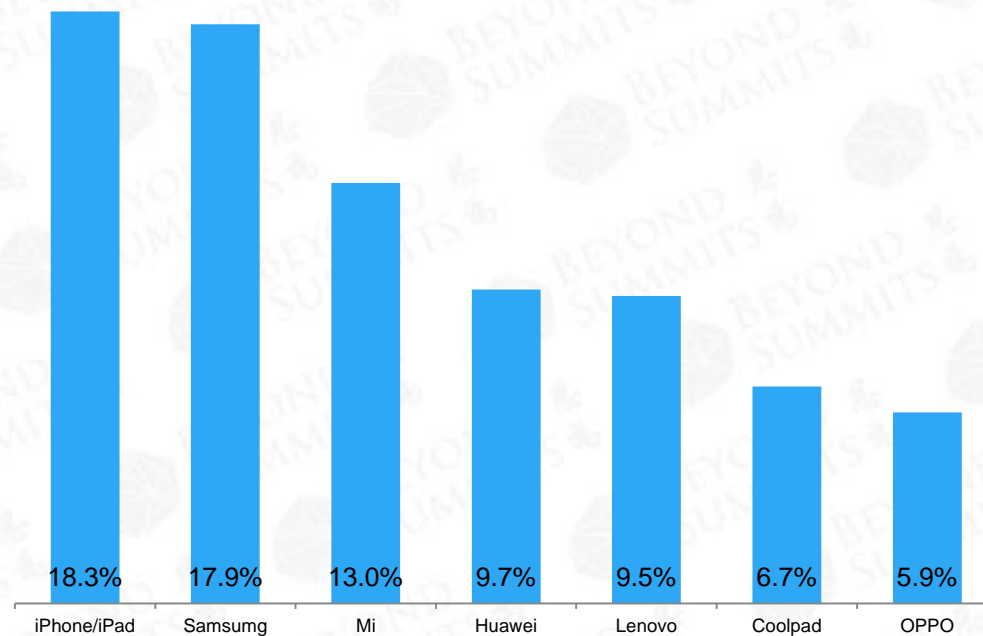
2015 00s' Cellphone User's Age Structure(Years Old)



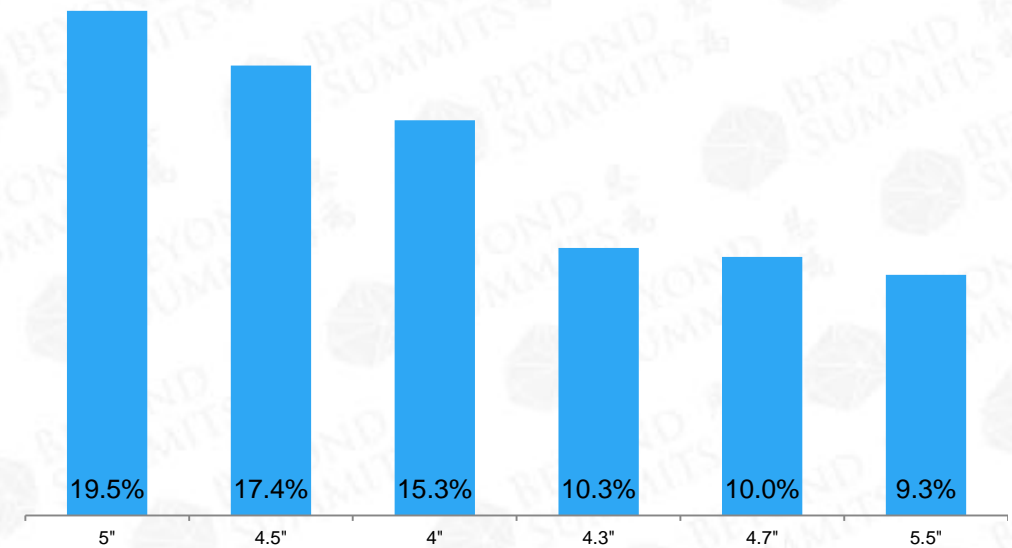
Source : Tencent *The Rise of 00s 2014*

Smartphones for Children, similar as smartphone for adults, iPhone, Samsung and Xiaomi are the top 3 brands. Smartphones with 4.5" and 5" displays are the most popular choices.

00s' Favorite Smartphone Brands(2014)



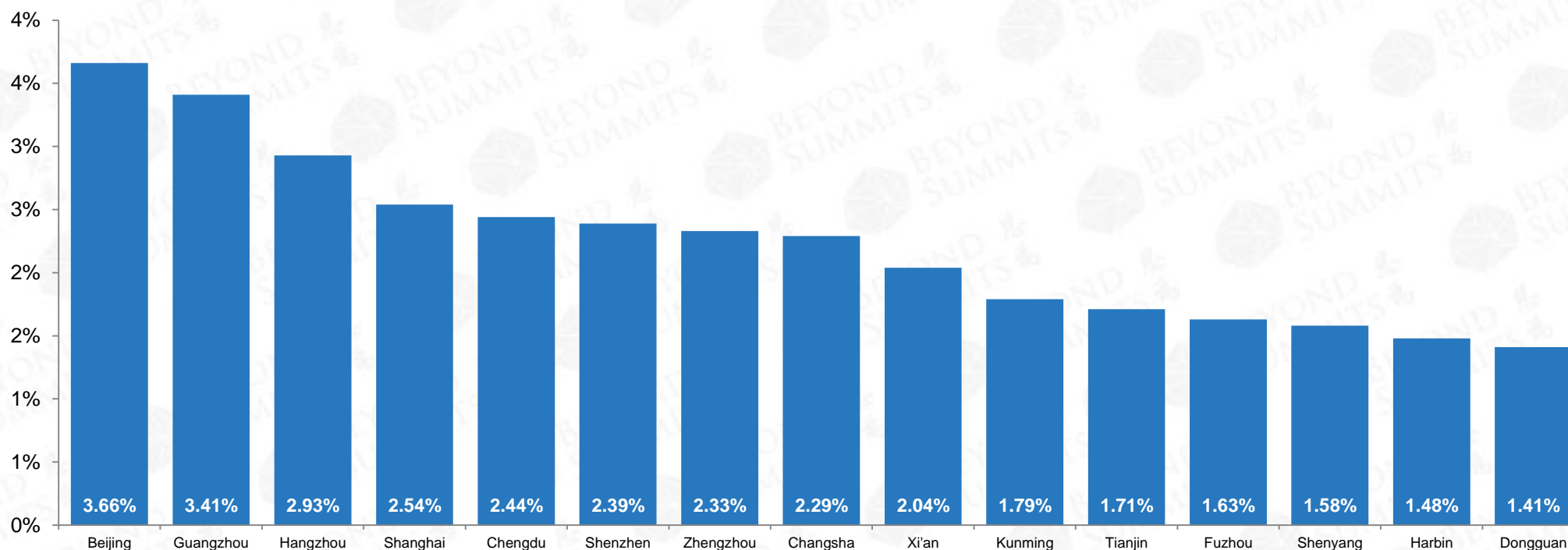
00s' Favorite Smartphone Display Size(2014)



Source : Tencent *The Rise of 00s 2014*

00s' mobile netizens are widely distributed in 1st tier cities, and meanwhile lots of young netizens gather in 2nd tier cities, such as Hangzhou, Chengdu, Zhengzhou, etc.

Where 00s with Mobile Devices Live (2014)

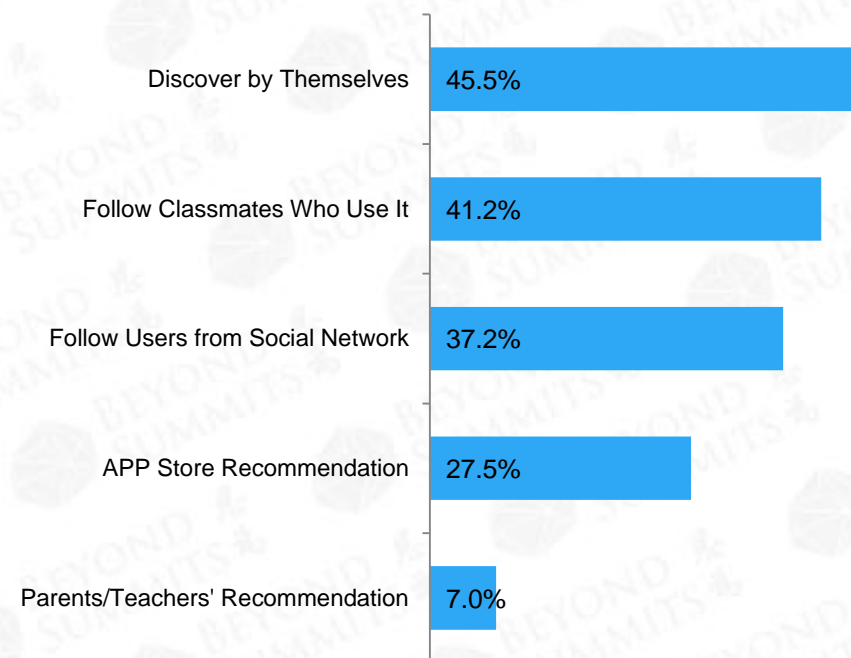


Source : Tencent *The Rise of 00s 2014*

Because of their young age, 00s who use APP are particularly in favor of socializing, entertainments and games, and they tend to obtain messages by themselves or recommended by friends.

Rank	APP
1	QQ
2	WeChat
3	Microblog
4	QQ Music
5	WeRun
6	iQIYI
7	Bilibili
8	Meipai
9	Minecraft
10	Taobao

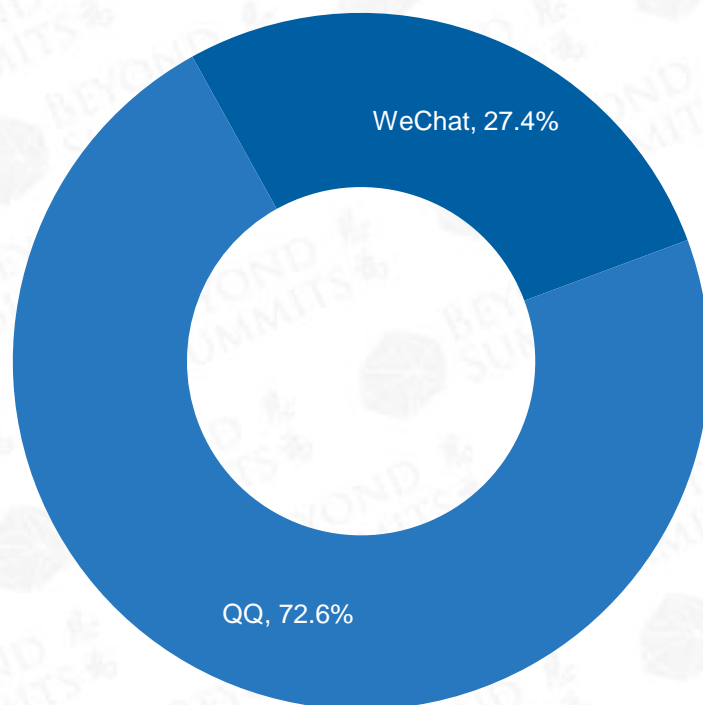
How 00s Get to Know APP(2015)



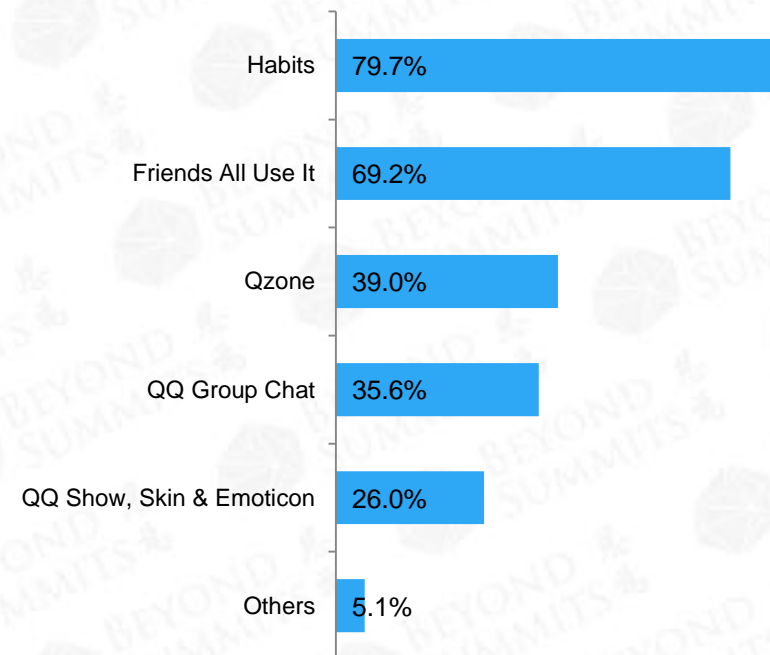
Source : Meitu 00s' APP Habits Research 2014

00s prefer to choose QQ because users are accustomed to it. Besides, their peers are all using QQ, which prompts a conformable psychology.

WeChat vs QQ Based on 00s Users' Preference(2015)



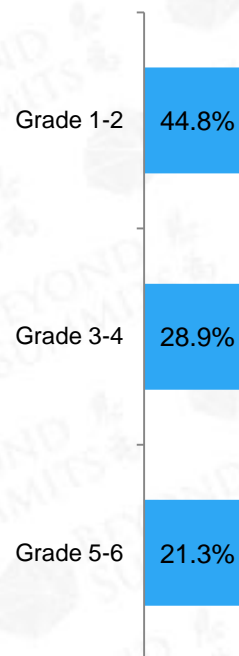
Why QQ Is Popular Among 00s(2015)



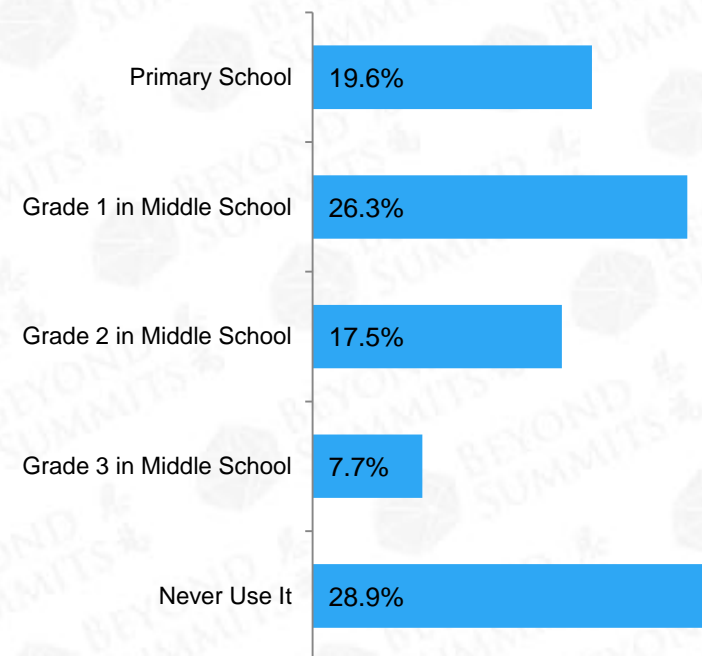
Source : Meitu 00s' APP Habits Research 2014

Considering the content and social mechanism of WeChat, many 00s don't use it or start to install it until they enter into middle schools.

00s' First Time to Use QQ(2015)



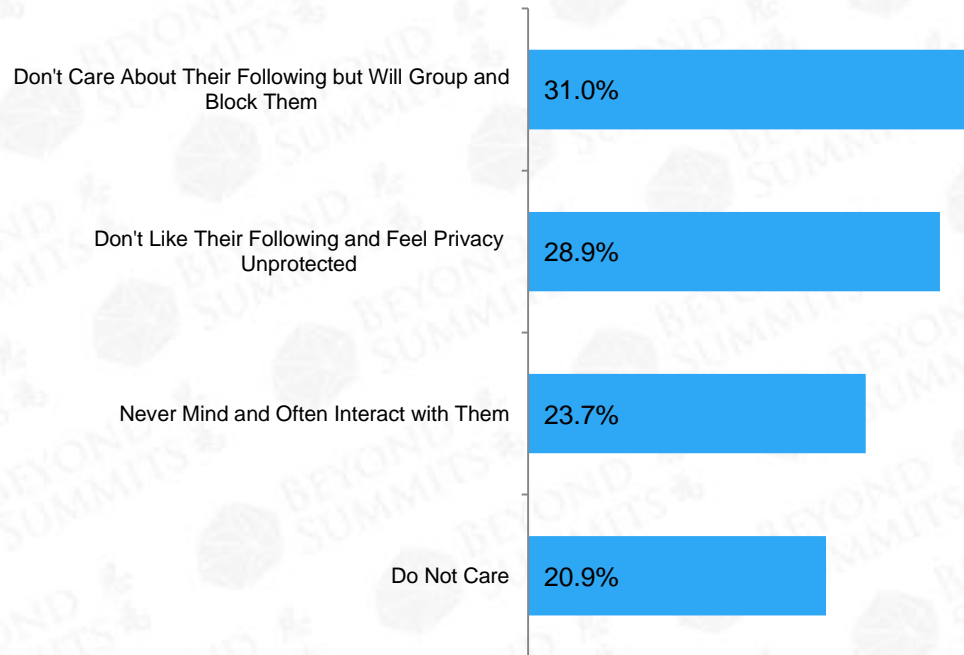
00s' First Time to Use WeChat(2015)



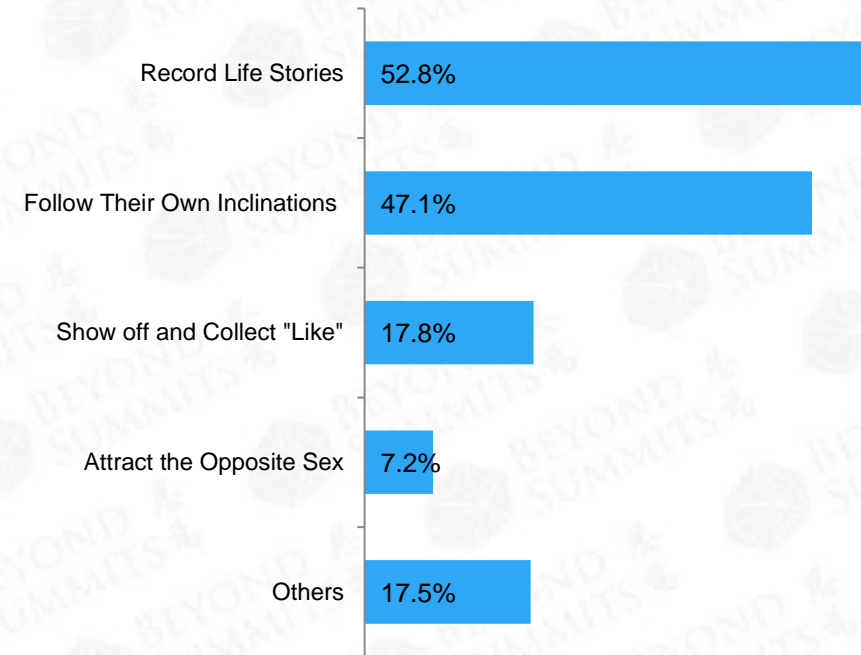
Source : Meitu 00s' APP Habits Research 2014

Messages posted on 00s' Moments and Albums are mainly about personal life. 00s' motivation is simple and self-centered, hence attention from seniors is not what they want, so as to keep some private space.

00s' Attitudes on Seniors Following Their Moments & Albums(2015)



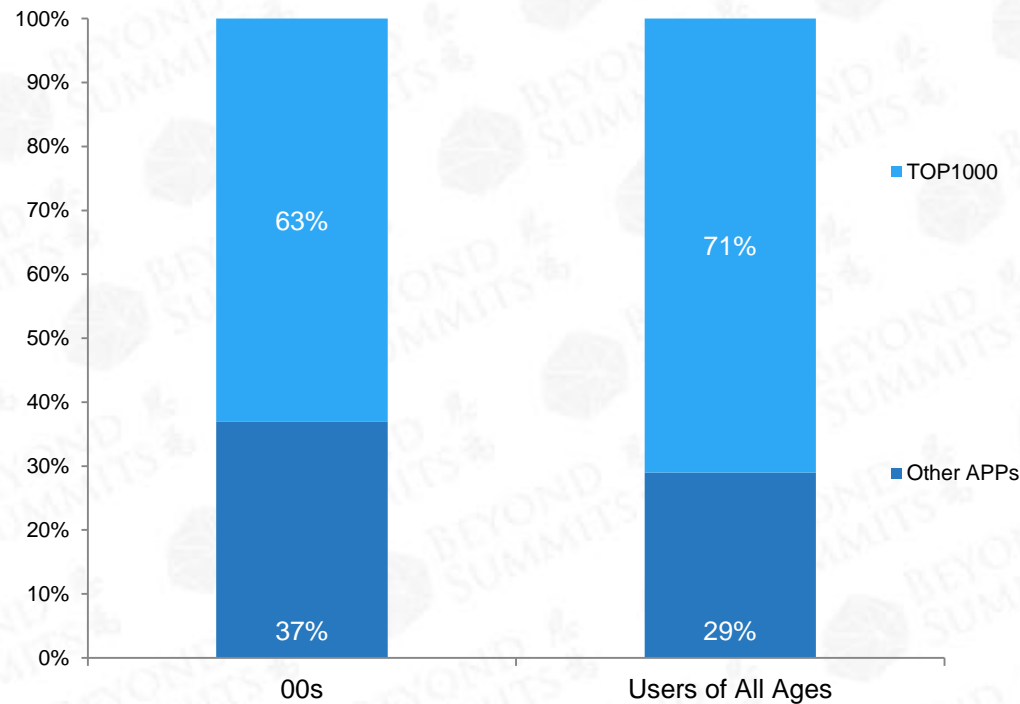
Reason for Posting Photos on Moments and Albums(2015)



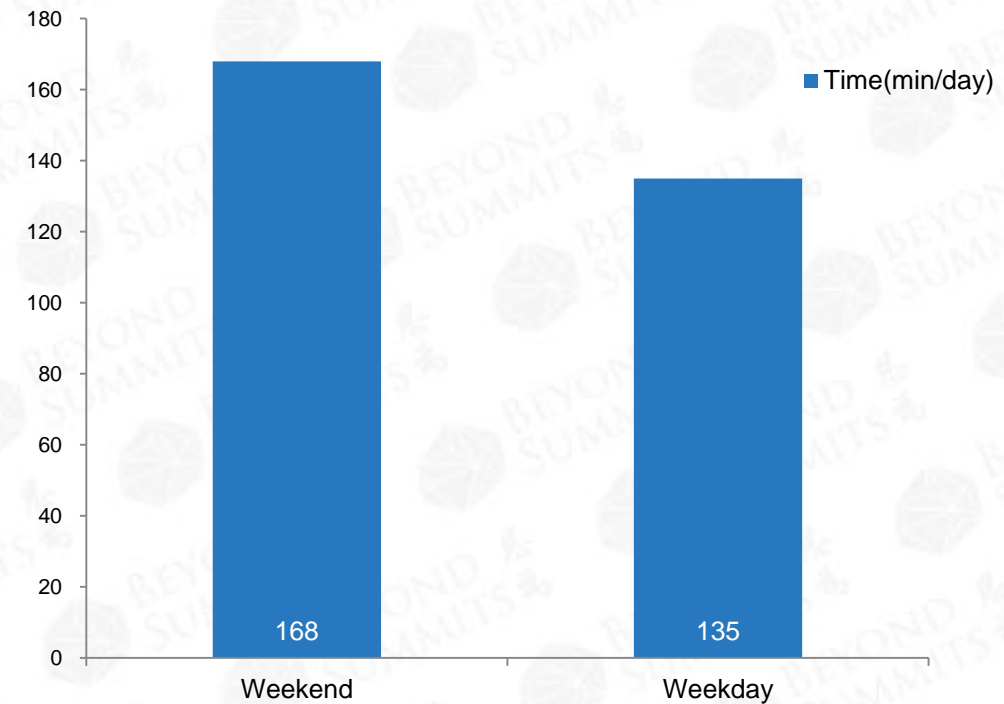
Source : Meitu 00s' APP Habits Research 2014

00s have their own tastes and are more willing to try some new special APPs which are not listed in APP TOP1000. Meanwhile, their time spent on Mobile Internet will peak at the weekend with entertainment as the main online activity.

APP Download by Smartphone Users(2014)



00s' Time Spent on Mobile Internet During Weekdays and Weekends(2014)



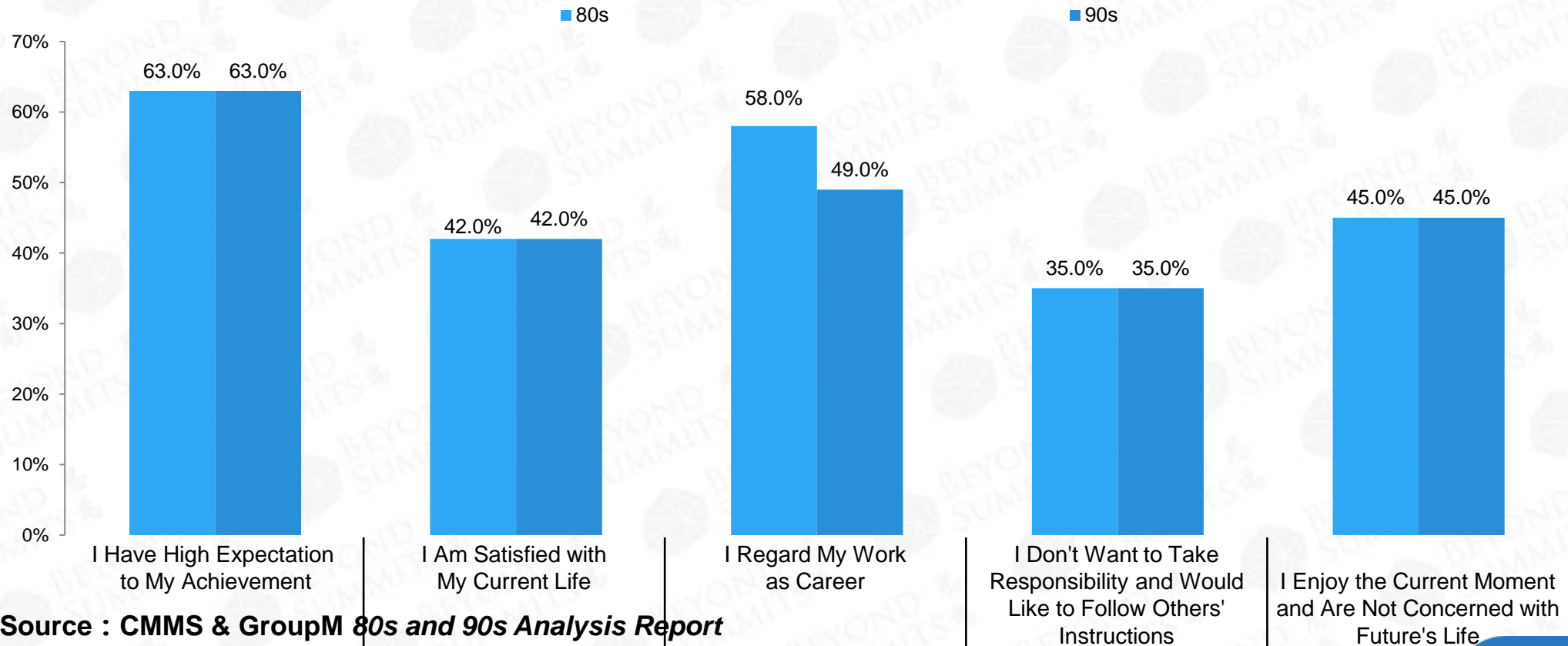
Source : Baidu 00s' Mobile Internet Habits Report 2014

Generation Gap Study

80s : They have already graduated to fit in the society with strong ambition for career.

90s : They live an easy life and are not aware of pressure from outside world.

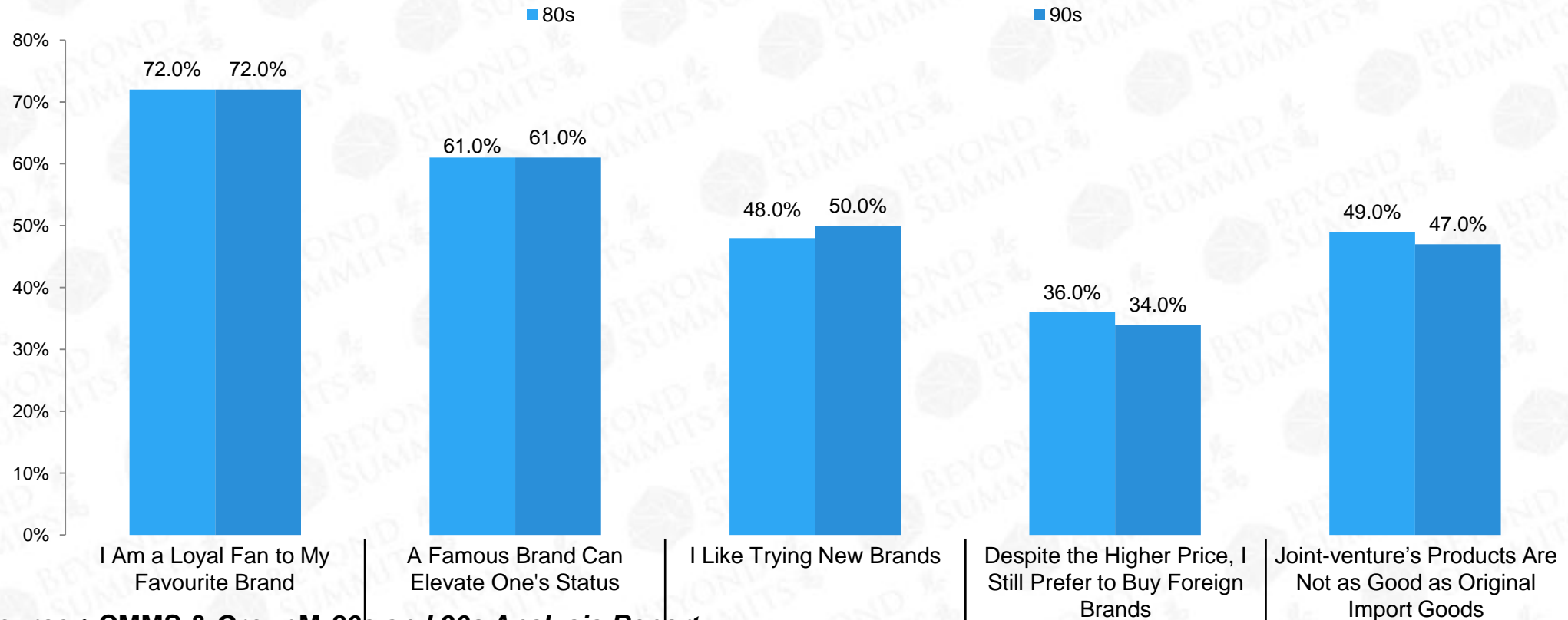
80s' Sense of Achievement vs 90s' Sense of Achievement



Source : CMMS & GroupM 80s and 90s Analysis Report

For 80s, they purchase something because they like it not because its brand or low price. Yet 90s prefer global brands, they are clear about brands they want and reject any copycat.

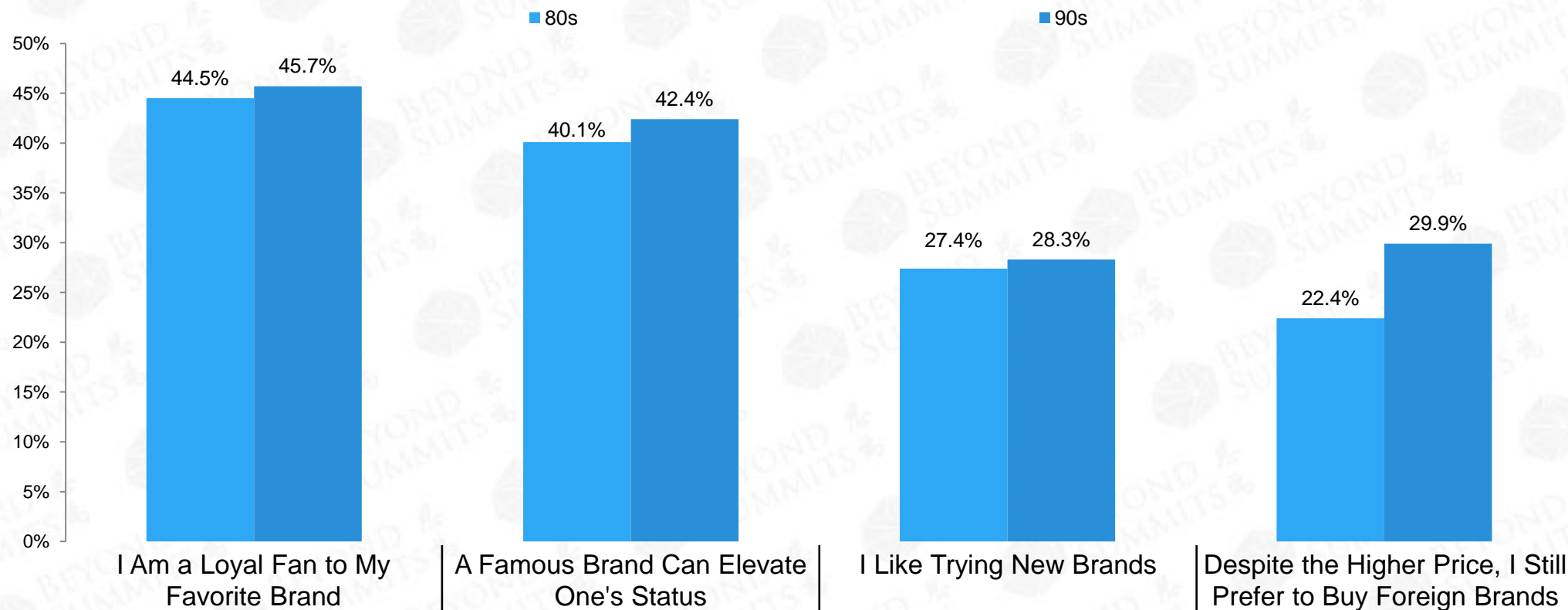
80s' Brand View vs 90s' Brand View



Source : CMMS & GroupM 80s and 90s Analysis Report

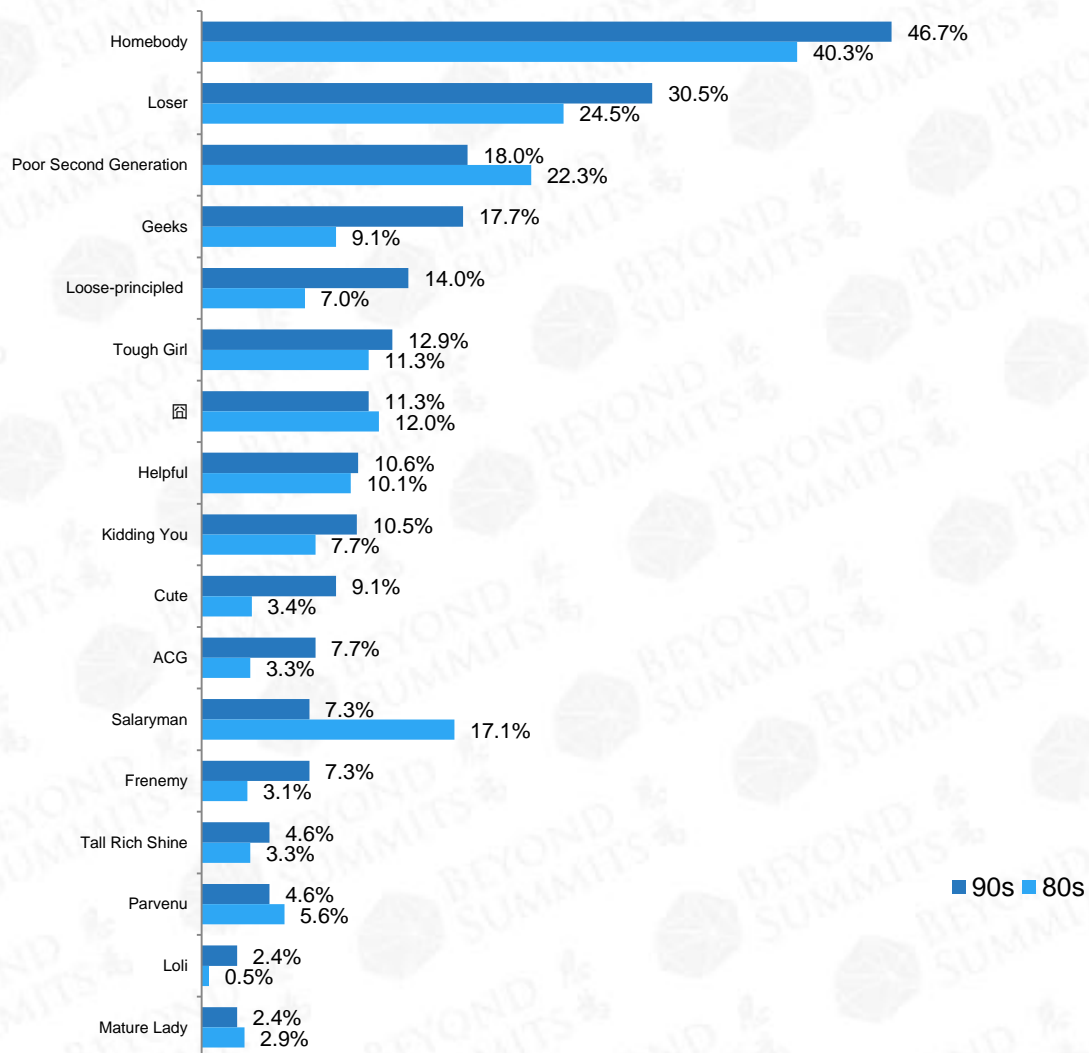
90s give more attention to ad style. They will be impressed by and feel resonated with a creative and stylish ad.

80s' Ad View vs 90s' Ad View



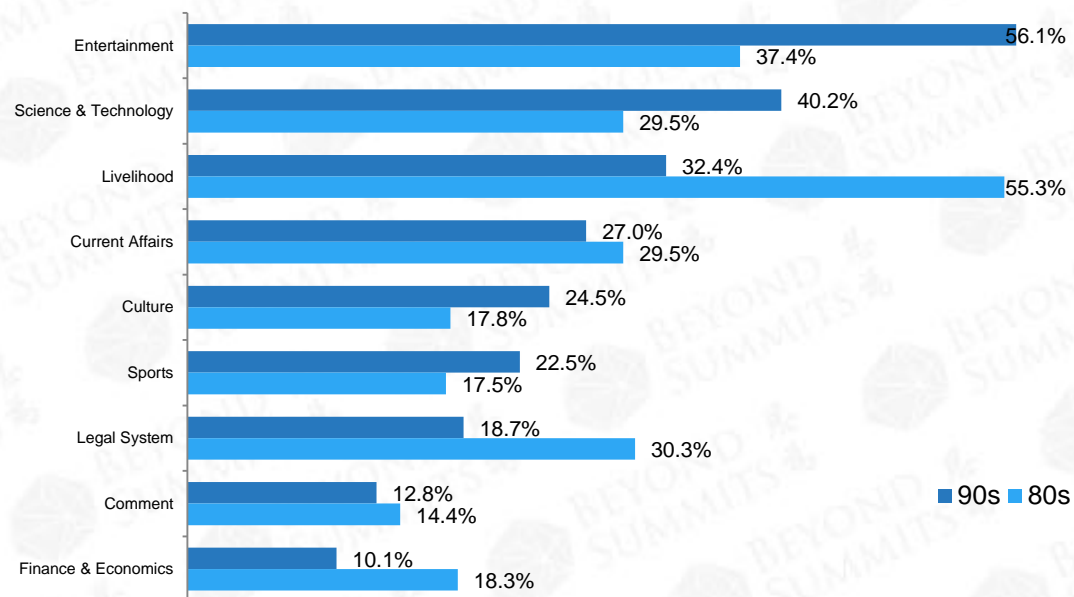
Source : CMMS & GroupM 80s and 90s Analysis Report

How 80s & 90s Label Themselves Online(2014)



80s and 90s define themselves as “Homebody” and they particularly prefer entertainment news. Yet 80s are interested in political news, society news and life news.

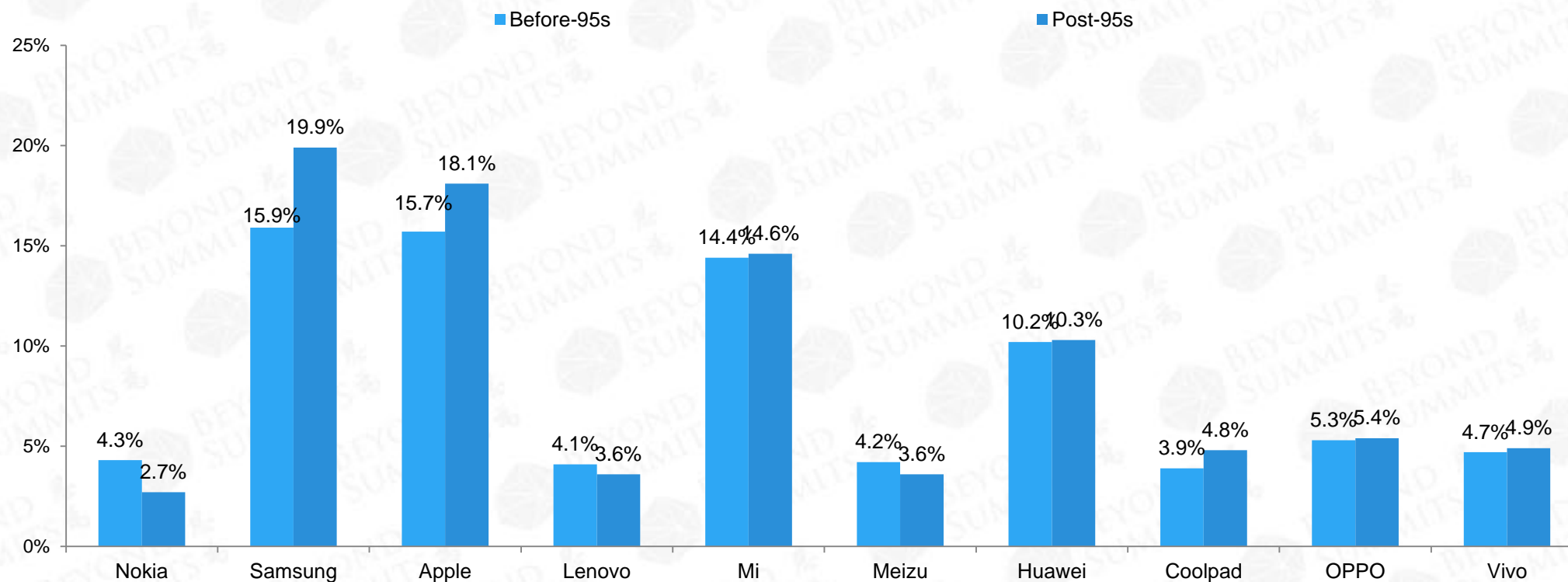
80s & 90s' Most Concerned News(2014)



Source : EnfoDesk 90s Mobile Shopping Behavior Report 2015

Post-95s prefer Samsung smartphones and iPhones more than those born before 1995, and they have become one of the mainstream consumer groups in current mobile market.

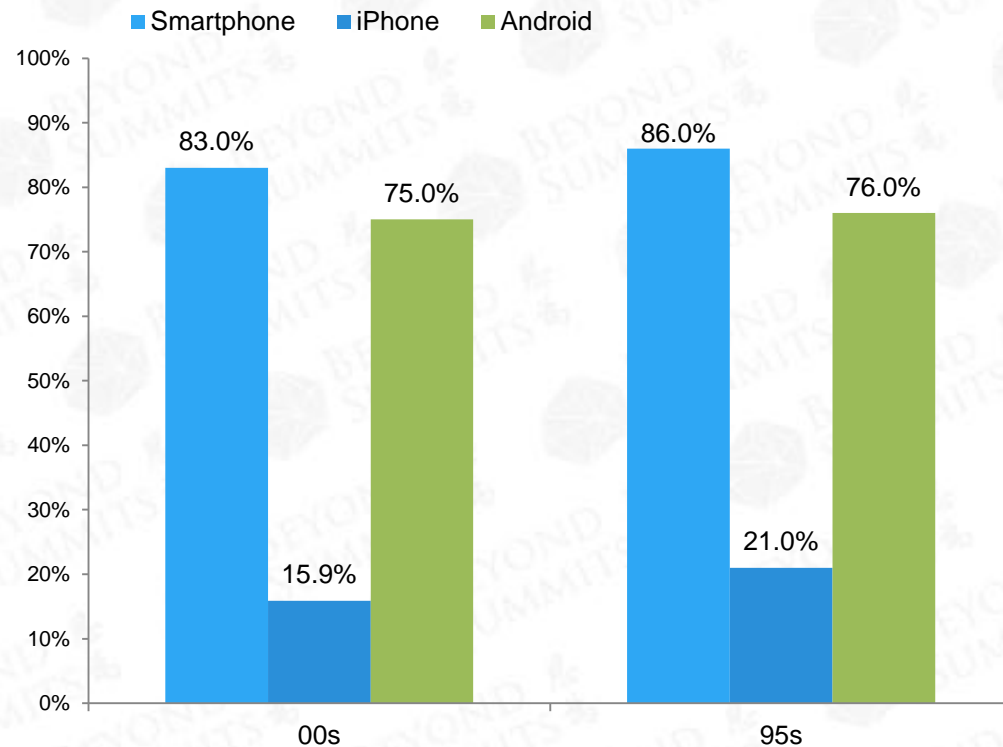
90s' Favorite Cellphone Brand



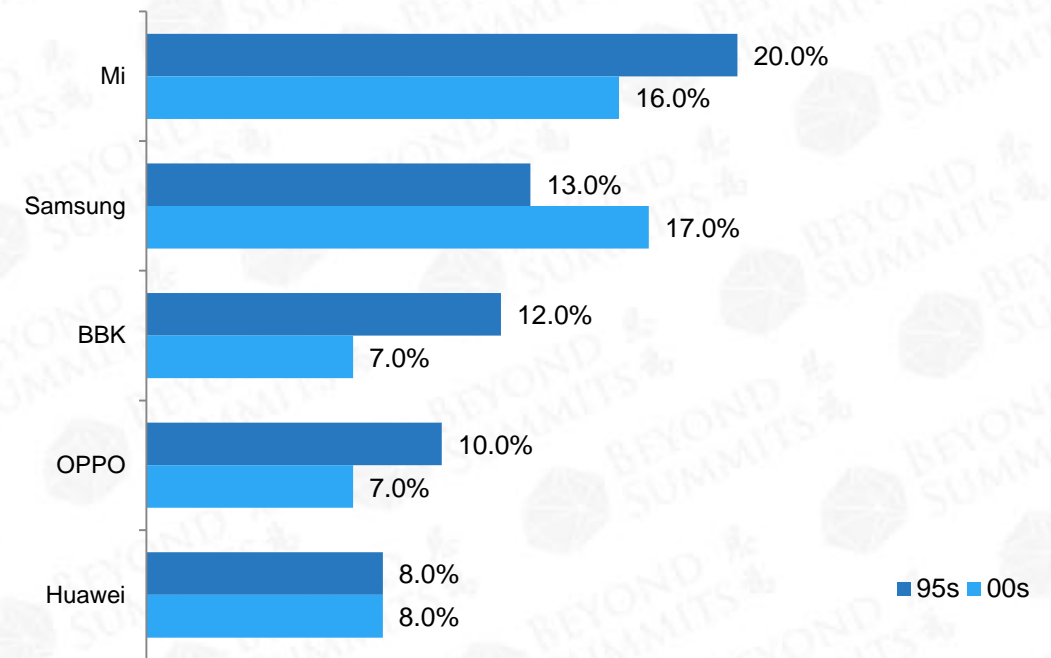
Source : Series Research on 90s, Media and Marketing Research Center, Peking University

83% of 00s' cellphone users choose smartphones, with an approximate penetration rate to 95s. Among all cellphone brands, Samsung and Mi are selected by most 00s' groups.

Smartphone Penetration Rate in 90s(2014)



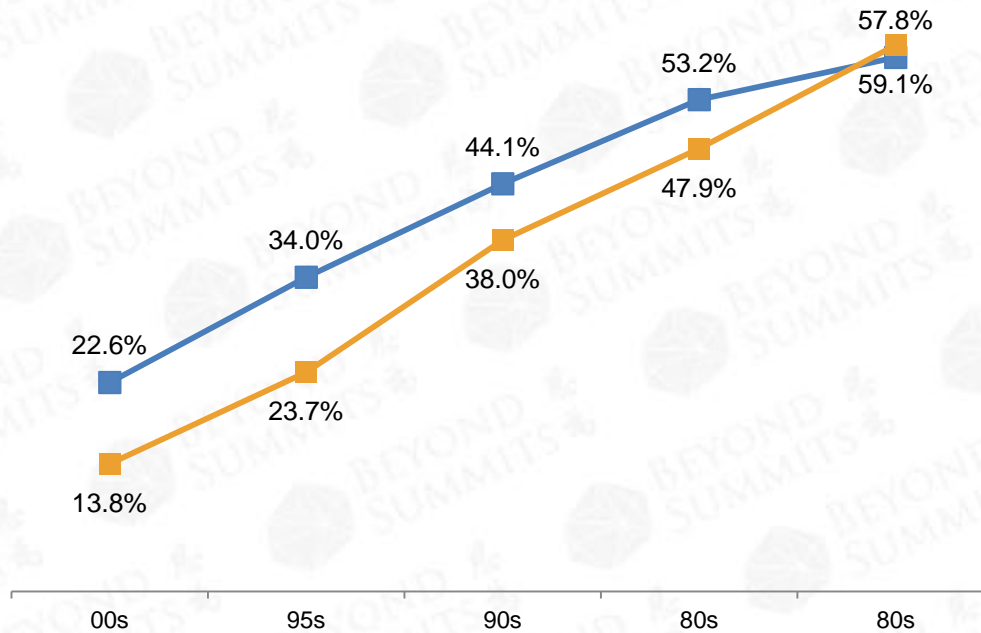
Top 5 Cellphone Brands for 90s(2014)



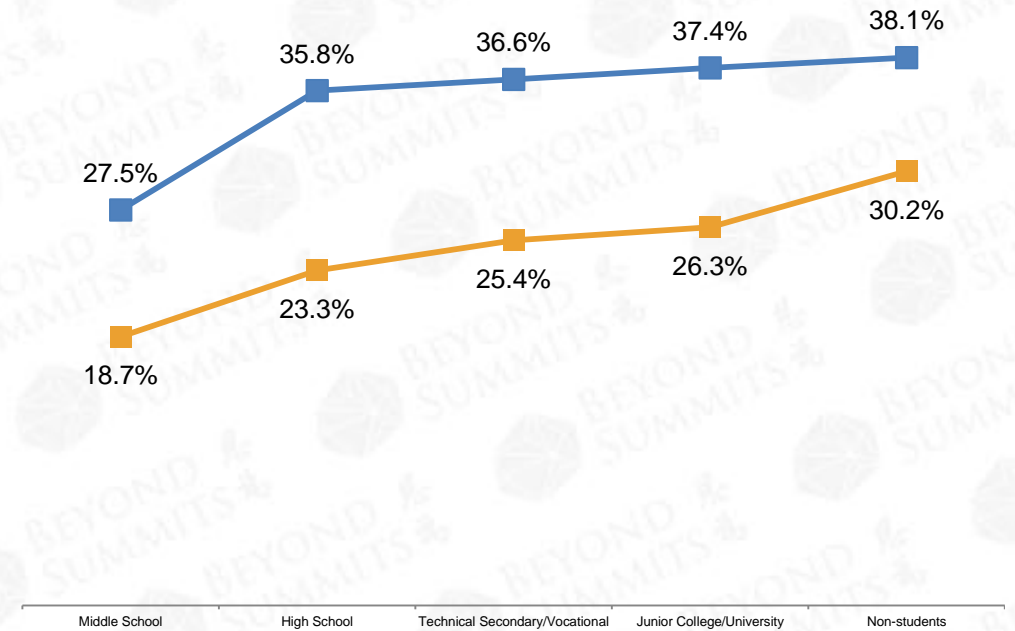
Source : Tencent QQ Mobile Social Behavior Report 2014

As 95s grow up, they tend to pursue general social values, such as being a reliable and mature person.

Evaluations They Want to Get from the Others(2015)



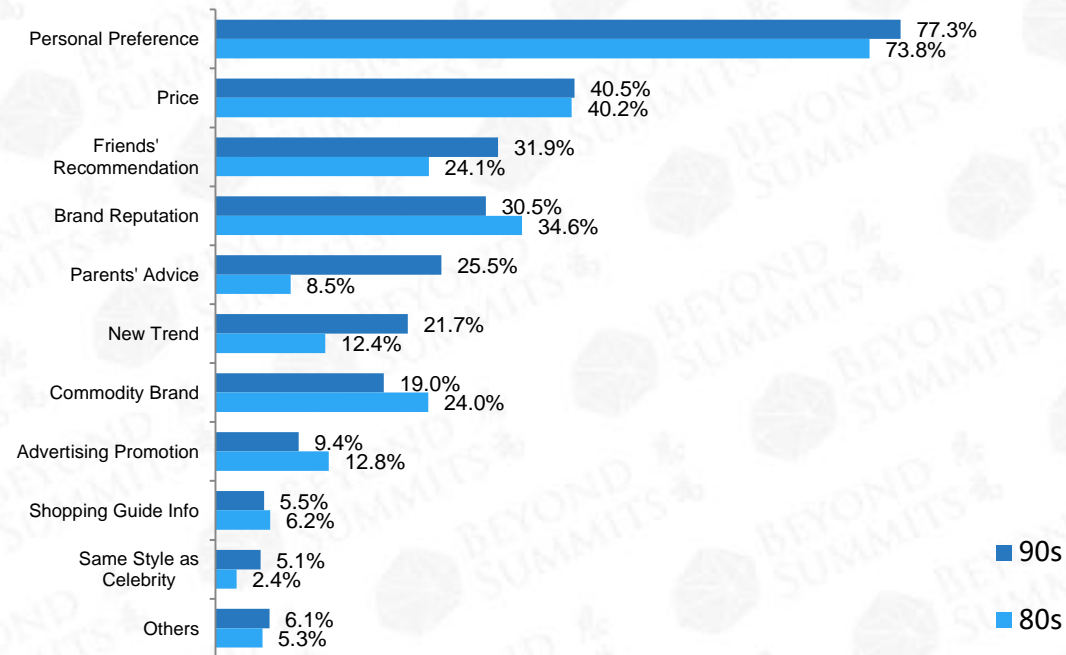
Evaluations They Want to Get from the Others(2015)



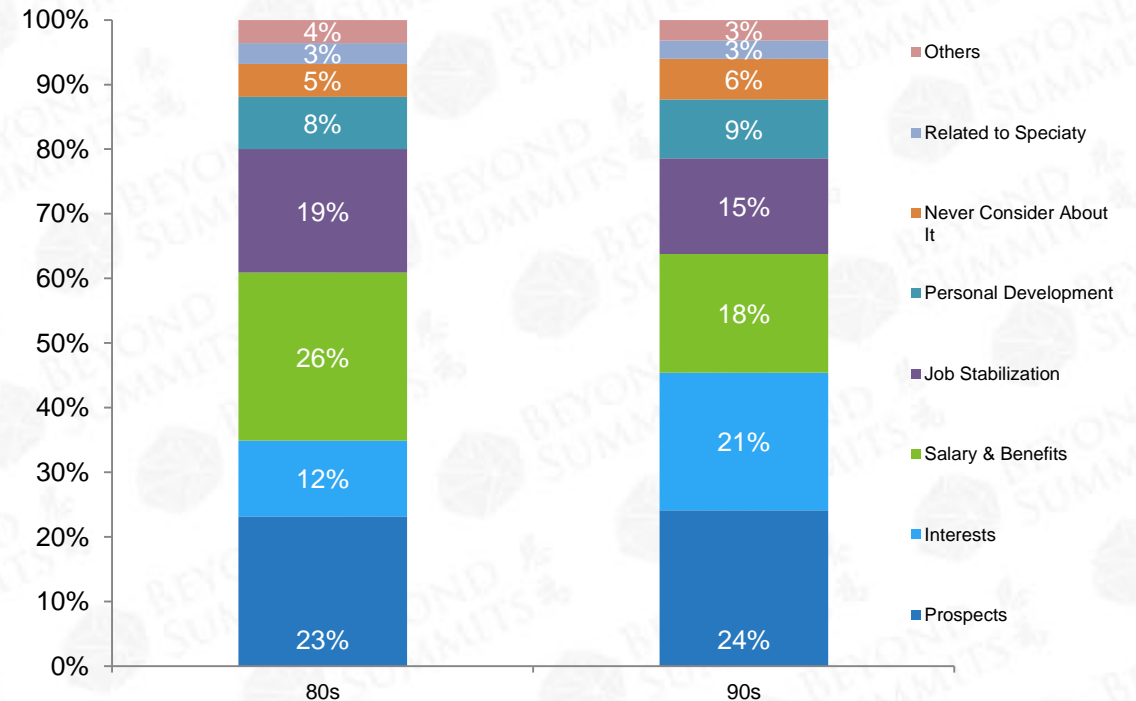
Source : MUX User Research 95s' Lifestyle Research 2015

Most 80s and 90s will purchase goods which they truly like, but 80s pay more attention on price, reputation and brand. In terms of jobs, 80s will choose their career with good prospect and salary while 90s tend to do what draw their interests.

Purchase Influencing Factors for 80s & 90s(2014)



Employment Influencing Factors for 80s & 90s(2014)



Source : EnfoDesk 90s' Mobile Shopping Behavior Report 2015

2015 China Overview, covering Chinese economy, media and markets, is a set of yearly research report conducted and published by Beyond Summits Ltd, a leading all-media total solution provider focused on cross-border brand building & destination marketing in China. This report aims to summarize domestic industries' status in 2015, introduce Chinese market knowledge to overseas stakeholders, and propose Chinese market insights. The whole set of China Overview includes 20 sub-topics including economy, city, people, the rich, luxury, investment, auto, tourism, immigration and cross-border business, as well as Chinese all media, internet, mobile internet, social media, TV, radio, print, OOH, movie and airport.

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