Digital Tribes

Exploring the Passions and Motivations of Chinese Netizens

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Marketers have long trodden a well-worn path up and down China's tiers of cities in the hope of uncovering what makes Chinese consumers tick. Not content with following in the footsteps of others, GroupM China have taken this hunt online, commissioning China's first ever Digital Consumer Segmentation to understand consumers' behaviors and attitudes toward digital media; and grouping netizens into seven different online tribes.

With 1.3 billion people, 710 million of them mobile phone users and 338 million active Internet users, China's digital scene is bigger, more complex and endlessly fragmented than any other online population.

To better understand this huge market, GroupM have looked at everything from gaming to social networks, online shopping to video sharing and entertainment – taking a close-up look at how the time consumers spend with digital media continues to grow exponentially year on year.

To do this, GroupM hosted focus groups and interviews with consumers aged 14-45 across nine different markets in China – from tier one cities like Beijing to tier three cities like Xuzhou and Shaoguan – asking them about their time spent online, most frequently used applications and platforms, need- and mood-states, and concurrent use of other media like TV and mobile.

By looking at how people responded to a set of 55 attitudinal statements, they were identified as being in one of seven typologies, different online personality types. These people all act and use the net in similar ways; they can only be in one typology, though they may move into another if their lifestyle and attitudes shift. Further depth was given by looking at how these typologies reacted to four main platforms or 'passion areas': online gaming; entertainment (downloads, online music/ video entertainment); social networking services (SNS) / chatting; and finally blogging/ BBS; online shopping is covered mostly in metro/capital cities.

The Seven Typologies

e-Active (18%)

Though not necessarily nerds, e-Actives are typically people who prefer life online. Most likely to be found in tier one cities, these young net-heads use the web as a place to do what they want and express how they really feel, things they are not comfortable doing in the offline world.

Interests: The tribe most interested in online gaming, chat and online shopping, reasonable interest levels in SNS and blogging.

Congenial Companions (15%)

More often than not women over 35, Congenial Companions are gregarious and have a heart of gold, using the net to stay in touch with their family and friends.

These social butterflies are stylish and like to buy the best brands and be the first person they know to try the latest products.

Interests: Online shopping; moderately interested in Chat, SNS, BBS/blog.

Stressed Strivers (17%)

These are white collars who want it all – a family, a career, status and a packed social life. Stressed Strivers juggle all these commitments and use the web to bring balance to their lives – keeping in touch with SNS and saving time by shopping online. Most likely to be young, married and female, they are ambitious and are used to getting what they want.

Interests: Very interactive, registering as the tribe most interested in SNS, online entertainment, chat, BBS/blogging and online shopping.

e-Explorers (13%)

Married and bored with their routine, e-Explorers head online to fulfill their need for mental stimulation, be it with news, gossip or entertainment. They believe that the web offers people a place to be who they really are; typically self-centered they are one of the first to adopt the latest technology.

Interests: Interested in everything. The mid-ranked tribe in online gaming, entertainment, SNS/chat and blogging/ BBS.

Bustling Bees (12%)

Bustling Bees are career-focused professionals who are always on the move, which is why they always have to stay connected to the net at all times. Predominantly married, male and live in tier two, they have an international outlook, yet feel their lives are routine, so seek adventure online.

Interests: Not enough time to spend on one thing, they are the lowest ranked tribe in online gaming, entertainment, SNS/chat and blogging/ BBS.

Fun Seekers (13%)

Like the name suggests, Fun Seekers are online for laughs; they are mischievous and enjoy joking around with their friends. They are open minded and interested in the world outside China as well as new products and the latest technology. Fun Seekers see themselves as the trendsetter in their social circle.

Interests: As if living up to their name, the fun seekers are into a little bit of everything. The low- or mid-ranked tribe online gaming, entertainment, SNS/chat and blogging/ BBS.

Intimate Indulgents (12%)

Likely to be middle-aged and have a stable career and the time to be able to relax and enjoy themselves, Intimate Indulgents are more concerned with their spiritual, than their material well-being. They use the web as a place to create a personal space for themselves and set time aside to use it to pamper themselves.
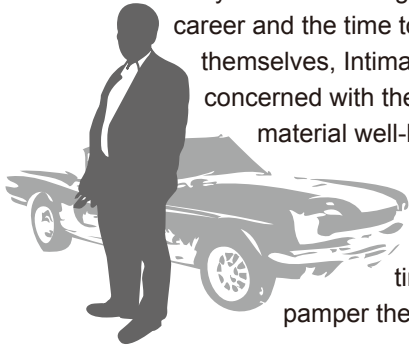
Interests: Interested in everything, especially gaming and entertainment; moderately interested in chat, SNS and blogging. They do not shop online.

If you want to reach a digital tribe, first you've got to speak their language; and by using these Digital Profiles, GroupM agencies can help brands create better, more insight driven communication plans that leverage Search, gaming, communication platforms, online content – as well as traditional display advertising.

Linking Typologies to Passion Areas

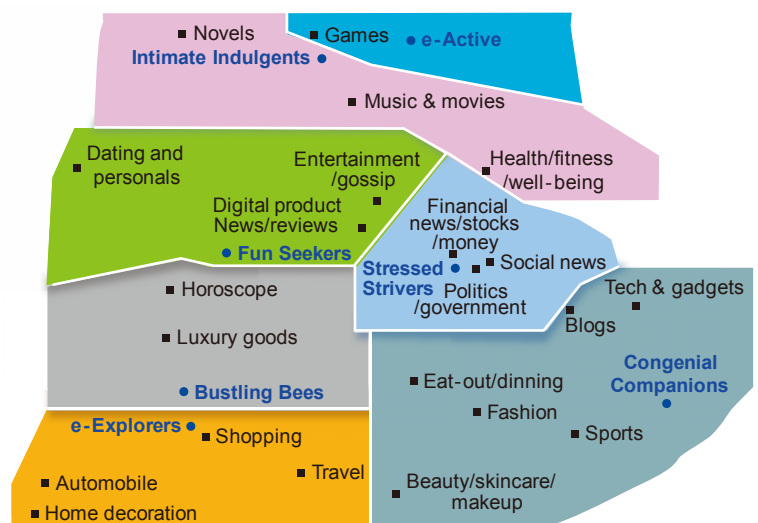| Share of Population (%)							
	Total	Online Gaming	Online Ent'ment	Online chat	SNS	BBS /Blog	Online Shopping	Others
Intimate Indulgents	12	14	12	12	9	9	13	11
Fun Seekers	13	12	15	13	11	9		13
e-Explorers	13	14	13	13	11	12	16	13
Congenial Companions	15	13	13	15	17	19	20	18
Bustling Bees	12	11	11	11	8	11	10	10
Stressed Strivers	17	16	19	18	26	24	20	18
e-Active	18	20	16	18	18	15	20	17
Base: All respondents	*1,150*	*792*	*759*	*980*	*226*	*228*	*87*	*809*

Motivations driving the key Passion Areas

Finding out what motivates consumers is the Holy Grail of marketing, and a look through the motivations which drive these online passions adds clarity to the three-dimensional image the survey gives of consumers. By examining the needstate – the set of compulsions which consumers get online to fulfil – we can see what motivates who.

1: Knowledge Quest (14%)

A quest for knowledge to enrich themselves and learn something new.

Consumers want to hear from different voices to get a more complete or objective picture; this need state is about sharing new ideas and information and has very little to do with escapism.

Mapping Typologies with Category/Content

- Novels
- Games • e-Active
- **Intimate Indulgents** •
- Music & movies
- Dating and personals
- Entertainment /gossip
- Health/fitness /well-being
- Digital product News/reviews
- Financial news/stocks /money
- • **Fun Seekers**
- **Stressed Strivers** •
- Social news
- Horoscope
- Politics /government
- Tech & gadgets
- Luxury goods
- Blogs
- **Congenial Companions** •
- • **Bustling Bees**
- Eat-out/dinning
- **e-Explorers** •
- Fashion
- Shopping
- Sports
- Automobile
- Travel
- Beauty/skincare/ makeup
- Home decoration

Key passion areas: Blog

Key typography: Congenial Companions, Stress Strivers and e-Active

2: Prestige (16%)

Consumers in this need state go online to do things that will lend them a feeling of superiority over others or to show off, giving them a sense of being in control. Internet provides a platform for them to escape reality and do something wild.

Key passion areas: Mid to high rank for all

Key typography: Intimate Indulgents, e-Explorers and Fun Seekers

3: New Experience (16%)

Consumers who use the Internet as a way to find something new. This new experience can range from finding a date, buying products unavailable offline, talking to loved ones.

Essentially, this need state is about finding a virtual reality and is a form of escapism.

Key passion areas: Online chat

Key typography: Intimate Indulgents, e-Explorers and Fun Seekers

4: Social Expression (17%)

This need state is focused towards communicating with friends and family as well as extending virtual networks.

Users can be in this need state as a way of creating a virtual identity for themselves by expressing who they really are. There is little focus on searching for information or self-enrichment.

Key passion areas: Online shopping

Key typography: Bustling Bees, Intimate Indulgents, and Fun Seekers

5: Keeping In Touch (12%)

Consumers seek comfort through being in touch with friends and knowing what they are up to. A focus towards others rather than merely self-expression.

Key passion areas: Online chat and SNS

Key typography: Congenial Companions, Stressed Strivers and e-Active

6: Release (14%)

Where consumers want to vent negative energy or release their emotions to take their mind away from their troubles.

Users in this need state typically go online to find a good deal or browse information on lighter subjects such as trends or fashion.

Key passion areas: Online Shopping

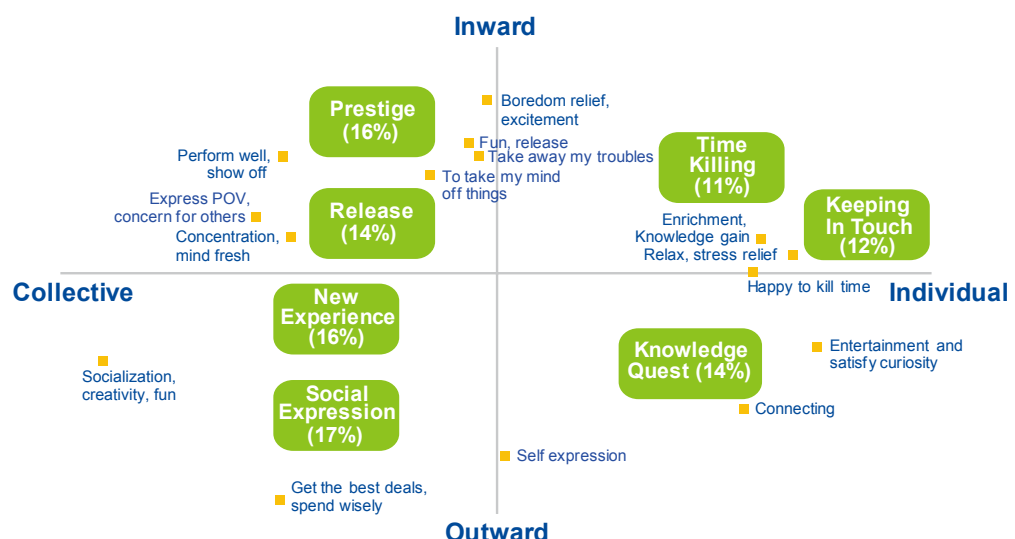**Key typography:** Fun Seekers, e-Explorers and Intimate Indulgents

7: Happy Time Killing (11%)

Consumers want to ease their boredom by whiling away a few hours online, all the while keeping themselves happy and entertained.

Key passion areas: Online gaming and entertainment

Key typography: e-Active

Mapping of the 7 Need states

Inward

Prestige (16%)

Boredom relief, excitement

Perform well, show off

Fun, release

Take away my troubles

To take my mind off things

Time Killing (11%)

Express POV, concern for others

Concentration, mind fresh

Release (14%)

Enrichment, Knowledge gain

Relax, stress relief

Keeping In Touch (12%)

Collective

Individual

New Experience (16%)

Happy to kill time

Socialization, creativity, fun

Knowledge Quest (14%)

Entertainment and satisfy curiosity

Social Expression (17%)

Connecting

Self expression

Get the best deals, spend wisely

Outward

Some other interesting insights from the data showed:

▸ Time spent online in Tier 2 cities exceeds that of even Tier 1 – as Internet becomes a primary entertainment medium for video and gaming.

▸ Video advertising was the most preferred form of ad engagement – followed by professional or peer recommendations.

▸ Logging on to Instant Messenger like QQ and then checking Social Network sites are the most commonly performed activities after going online.

▸ Online entertainment is much more than relaxation; the survey shows it is preferred over traditional media such as TV and cinema as it offers more choices, is up-to-date, cheap and easy to access, and is time flexible.

▸ Chat and SNS make up a majority of time spent online, but SNS has less penetration than chat.

▸ The role of net bars is evolving – it used to be where people got online in China, but now Internet penetration is much higher and people can get online anywhere anytime, net bars function as a social space for shared online experience such as gaming.

▸ Mobile Internet use is primarily used for leisure

▸ Internet usage peaks in the evening, and people spend an average of four hours online a day – even on weekends.

▸ People who spend the most time on blogs are young people, 14-25 years old.

▸ BBS/Blogging is a primary source of online self-expression, particularly relevant when juxtaposed with the centralized ideology of China's traditional
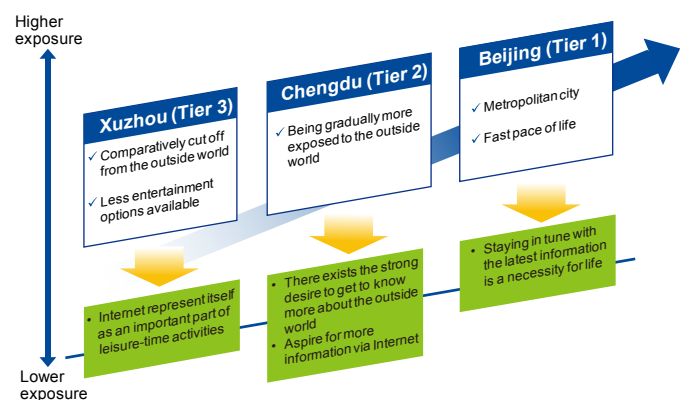
media; though those in T1 cities use it as a way to kill time and to get sense of achievement, while those in T2 cities used it as a way to connect with others and have a new online experience.

▸ BBS/Blogging is the main conduit for those seeking consumer-generated content as a reference for product purchase, a facet that will prove very interesting to marketers.

What are some key themes for engaging consumers online in 2010.

▸ **Create a conversation –** as time spent in social media sites like Kaixin001 and Renren continue to rise – brands must have a "social strategy" to create and enable conversations with their consumers.

▸ **Remember Online is Entertainment –** consumers, especially in second and third tier cities, see online as key source of video and casual gaming entertainment. It's crucial to develop brand content that targets these areas.

▸ **Create Communications Plans based on Behavior –** consumers don't spend their time online going from site to site to site. They chat, shop, play games – brands must create engagement around these behaviors rather than just buying display advertising.

Chinese netizens in different tier cities

Higher exposure / Lower exposure

Xuzhou (Tier 3)
✓ Comparatively cut off from the outside world
✓ Less entertainment options available

Chengdu (Tier 2)
✓ Being gradually more exposed to the outside world

Beijing (Tier 1)
✓ Metropolitan city
✓ Fast pace of life

• Internet represent itself as an important part of leisure-time activities

• There exists the strong desire to get to know more about the outside world
• Aspire for more information via Internet

• Staying in tune with the latest information is a necessity for life

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