Welcome to the latest issue of BLINK!

BLINK is MediaCom’s thought leadership series that takes an in-depth look at future-focused subjects such as the media opportunities in the future of mobility and the social content codes fueling luxury brands' growth. We aim to inspire marketers in China and around the world through provocative perspectives, unexpected insights and actionable advice from MediaCom experts.

In this issue, Saw Gin and Howard delve into China’s growing play economy. This fascinating – and fun! – topic is much more nuanced than one might initially expect, and it has huge implications for brand and business growth.

Please get in touch with us to learn more about the specific play opportunities for your company, and follow MediaCom on WeChat to stay up to date with all our latest news and thinking.

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MediaCom helps brands unlock growth through media. We do this by applying our unique Systems Thinking approach to data, technology and creativity to design communication strategies that build brands and generate sales.

As part of WPP, the world’s largest marketing communications services group, and part of GroupM, WPP’s consolidated media investment management arm, we have access to the richest data sets and most robust benchmarks in the business, enabling us to identify the best avenues for growth and unlock the potential in every brand.

MediaCom is one of the world’s leading media communications specialists, with billings of US$13.5 billion (Source: COMvergence, March 2019), employing 8,000 people in 125 offices across 100 countries. Its global client roster includes adidas, Alibaba Group, Dell, Mars, P&G, Bose, AkzoNobel, Richemont, Shell, and Hasbro.

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China is a nation of playful and fun-loving consumers, and ‘play’ increasingly influences consumer decision-making in all aspects of daily life. Commercial signals – the growth of digital and physical gaming, the popularity of crossover brand collaborations, and the rising number of playful content, social and commerce innovations – all indicate the power of playfulness to drive brand affinity and sales.

Many companies are rushing headfirst into the play economy, but few have fully understood the many reasons why consumers play and the multiple playful modes through which brands can meet their needs. These insights are crucial to gaining competitive advantage as the Chinese play landscape evolves and expands.

In this report, we share our perspective on how brands can capture an outsize share of the growing play economy. First, we explore the cultural nuances, societal tensions and technological advances shaping the future of play in China. Then, we unpack the diverse motivations, including nostalgia, self-improvement and recognition, that are fuelling consumers’ desire for play. Informed by this rich understanding, we consider how brands should innovate across communications, product and experience to offer their discerning consumers new ways to play.

As part of our research, we spoke directly with consumers and you will hear from them in their own words in the following pages. What’s more, we are honoured to feature practitioners from leading brands and media platforms who have shared their viewpoints on the business of play. And be sure to play as you read with our very own toy on the last page of this report – you may find that it sparks some creative ideas!

Read on to join us in China’s giant playground,
IN CHINA, PLAY IS SERIOUS BUSINESS

Whether buying a bubble tea or a designer handbag, choosing which short-form or feature-length video to watch, or relaxing alone or with friends, play increasingly influences how Chinese consumers choose to spend their time and their money.

Play triggers strong emotions such as joy, surprise, amusement, triumph and desire, making it a universal human behaviour and a powerful tool for marketers to grow their brands' share of consumers’ hearts, minds and wallets.

Play is more than just fun and games

While ‘play’ is often synonymous with ‘fun’, our research revealed that consumers seek out play to satisfy a wide variety of need-states. What’s more, the opportunities for brands take different forms across different sectors going far beyond children’s toys or video games. We have identified three major activation modes that we explore in this report:

- **Playfulness**: Products, content, communications and experiential activations that incorporate playful codes and attitudes, e.g. playful brand collaborations
- **Playing**: Leisure play activities whether by individuals or groups that take place online and offline, e.g. online gaming, playing board games
- **Playthings**: Objects designed specifically for various types of play, e.g. toys or collectables

Thought starter:

What are the first word associations that come to mind when you see the word ‘play’? Ask those around you – are your answers similar or different?
Consumers are increasingly willing to pay to play

The play economy is big and growing bigger. Chinese consumers are spending more money on play and spending more time consuming and creating playful content. Although the immense and evolving play economy is difficult to accurately quantify, many commercial signals indicate its power and potential:

Sales Revenue of Major Play-Related Categories (RMB)

Active Users and Time Spent on Playful Content Platforms

These impressive figures clearly signal that China is a nation of consumers with a high appreciation and willingness to pay for fun and endearing products, entertainment and experiences.
We are witnessing major changes in consumer behaviour, and many of the long-term trends around play have been accelerated by COVID-19, underscoring the urgency for brands to stake their claim in China’s giant playground.

To determine how marketers can gain a lasting edge over the competition in the play economy, MediaCom China conducted a 360 exploration of critical signals by mining industry, media and consumer data, analysing commercial responses and participating in two of China’s hottest ‘play’ events – China Joy and Bilibili World. Furthermore, we commissioned Foresight Factory, a leading consumer trends agency, to deploy trendspotters across 7 cities and survey consumers in order to gain a deeper understanding of Chinese consumers’ attitudes towards play.

We set out to uncover: what is the medium-to-long-term future of the play economy in China? What are the different motivations for play, and how does play affect different aspects of consumers’ daily lives? What are the playful communications, content, product and experience opportunities that could drive growth across categories and brands?

This report serves as a source of inspiration and a provocation for marketers to consciously consider how play should be incorporated in brand plans to capture a sizeable share this exciting growth opportunity in China. Let’s play!
MARKETERS AND MEDIA ON THE FUTURE OF PLAY (PART 1)

We asked our valued clients and media partners to share how they see Chinese consumers’ desire for play evolving and how their brands are exploring growth opportunities in the play economy. Here’s what they had to say:

“In the past 10 years in China, consumers’ desire toward playfulness has improved and changed significantly in terms of ‘quality’ and ‘diversity’. Gen Z, a generation raised with the internet, has brought new cultures and choices to playfulness. Now, the platforms for playfulness have become much richer than in the past – the next phase of this change will be more content that is purely made in China.

Our mission as PlayStation is to enhance the borders of ‘play’. Our new global brand tagline is “Play Has No Limits” which embodies our brand philosophy. In China, our focus is still to provide the better quality entertainment experience that only gaming can deliver and also to encourage China local gaming culture including the development of local titles.”

Keijiro Ishikawa, Marketing Director, Sony Interactive Entertainment China

“The Hasbro Brand Blueprint is our strategic vision and consumer insights are at the center of the blueprint. Through years of consumer research, we have seen more parents come to appreciate the positive benefits of purposeful play – both for child developmental and quality time to bond as a family. With this in mind, we have been able to unlock a number of Hasbro brands in China, including Play-Doh, Monopoly and Peppa Pig, by leaning into the educational and social opportunities associated with play. With bespoke content, KOLs, TV co-promotions and integrated eCommerce campaigns, we can make what to play, how to play and where to buy turnkey for parents so they can get straight to the fun!”

Tamara Grindrod, Vice President, Marketing & Sales APAC, Hasbro

“As China’s economy continues to grow on the back of technology innovation, Chinese consumers get to enjoy play from red packet grabbing in WeChat group chats to world class entertainment on your mobile phone since Tencent has always been able to provide a variety of ways to satisfy Chinese users’ appetite for playfulness.

This year, we have seen an unprecedented challenge where people have been forced to change their lifestyle. Tencent is happy to see that we have brought Nintendo Switch and its world-renowned game Ring Fit Adventure to China this year. As not only during this difficult time do we have to keep our spirits up, we get to stay healthy through playing.

And this is what I believe to be future of play, which is something for your mind, your body and ultimately your soul.”

Fred Hu, Director of Sales, Marketing & Operation, Tencent China

“After COVID-19, we need a more optimistic & positive living environment especially for the young generation who are more self-expressive and looking for a playful-living community. As a modern shoemaker from Denmark, ECCO is always committed to connect with Chinese young generation, inspire a better & playful journey and a profound sense of well-being.”

Benny Liu, Marketing Director, ECCO China
PUZZLE PIECES: MACRO TRENDS SHAPING THE FUTURE OF PLAY IN CHINA

Multiple societal forces are impacting consumers’ desires and behaviours, thereby changing the face of play in China. New tensions create new opportunities to meet consumers’ needs, especially as limited leisure time makes play ever more precious.

The rise of urban living across China puts pressure on outdoor play

China’s rapid urbanisation has brought with it the annoyances and anxieties of modern city life: high cost of living, noise and air pollution, loneliness, security concerns, and more. Consumers turn to play to destress and escape these troubles. However, outdoor physical play spaces are under increasing pressure from the growing population and more construction and commercial activities, pushing city dwellers to spend more of their leisure time indoors and online.

“[In my city, there are few locations with enough healthy and interesting play for either adults or kids. I hope government can build more facilities and guide citizens to have more outdoor plays.]”

– Xinyu, Ganzhou

From 996 to 715: China is working harder than ever with limited playtime

‘China After Dark’, our BLINK report published in December 2019, explored how the intense Chinese working culture was turning nighttime into prime time for leisure activities. Working ‘996’, i.e. from 9am to 9pm 6 days a week, was already the norm in top tier cities, and ‘715’ is a trending topic online post-COVID-19 – some people are working as much as 15 hours a day, 7 days a week as the nation is in ‘catch up mode’ for a rapid economic recovery. Increasing work obligations are altering when, where and how consumers spend their scarce, precious leisure time.

“When I play, I can get rid of my current life temporarily. That time doesn’t belong to anxiety or stress.”

– Matilda, Shanghai
Digital innovation creates immersive and exciting ways to play

The advent of 5G connectivity this year holds huge potential for play: further development of augmented and virtual reality and 3D as well as the increased adoption of wearables will blur the lines between online and IRL (‘In Real Life’) play. 5G speeds will also boost content streaming, creation and sharing capabilities, creating more opportunities for consumers to engage with content and connect with their ‘tribes’ online.

“As life stages become less strictly defined, consumers of all ages want to play

In 1990, 58% of Chinese women aged 20-24 were already married. By the mid-2010s this measure had fallen to just 35%. Many consumers are actively choosing to delay (or skip) traditional life events to pursue individual achievements and personal passions, while increasing life expectancy creates new demand for play later in life.

More consumers living alone creates a greater need for solo play as well as group play that individuals can join online. Other consumers are looking for family-oriented play that fits multi-generational households, while others still increasingly seek ways to enjoy the full potential of their ‘second youth’ in retirement.

Renewed appreciation of Chinese cultural traditions includes leisure play

Leisure has an important place in China’s long cultural history as a revered act associated not only with finding physical rest, but also with ensuring a spiritually-rested mind. Ancient Chinese artworks often depict nobility playing games or relaxing in harmony with nature. As China’s rich cultural history comes to the foreground of popular culture, its view of leisure will meld with modern forces to redefine play in China for the 21st century.

“People can get a whole new perspective with VR games as they take control of the game in fully immersive worlds with challenges.”
- Binny, Haiku

“I know some friends who are single, and video games are everywhere in their lives. The first thing they do after they get off work is to turn on their PS4 or play mobile games on the subway.”
- Vicky, Beijing

“China has many unique forms of ‘play’ from our cultural heritage: mahjong, Chinese chess ‘weiqi’, and Chinese caroms ‘kangleqiu’ are just some of the great examples of leisure play that China has enjoyed for a very long time.”
- Alex, Beijing

Thought starter:

Seeing how macro forces are changing the face of play, are you targeting the right audience, the right occasions and the right ways to play?
Digital adoption accelerates while sparking renewed love for offline play

Social distancing quickly brought online gaming and virtual ‘cloud’ entertainment into the mainstream as mobile games and short video content became essential to combat loneliness during the period of pandemic control. Now, these short-term adaptations are becoming longer-term habits as more consumers spend more time on online play activities.

Yet, as restrictions have eased, consumers also report a greater love for the physical world. Our trendspotters reported a strong desire to spend time outdoors and to hold on to intergenerational family time post-lockdown through in-person play.

‘Less crowded’ becomes a decision factor for how to play together

‘Unplugged’ play helps consumers recharge away from the many stresses of their always-on digital life. However, consumers remain concerned about hygiene measures and crowd avoidance. Our research indicates that people now prefer low-density environments and private spaces, leading to a surge in new forms of small group play that could last as consumers seek to avoid future virus outbreaks.

Play in all modes gains importance as a welcome break from the daily grind

Play has gained even greater importance as a therapeutic antidote to daily stresses and the grim news cycle. And while consumers are more concerned about their finances, they are also on the lookout for small indulgences that can lift their spirits and serve as a reward for hard work – especially as big-ticket events like music festivals and foreign vacations remain out of reach.

Thought starter:

Considering the lasting impact of COVID-19 on consumers’ playtime, what can brands do differently to capitalize on these new desires and challenges

“During COVID-19, the bonding of family members deepened, and (now) they care more about playing together, and cherish the happy moments that they created together.”

– Zhong, Ganzhou

“This year, offline activities takes up most of my time. The two months of lockdown in the beginning of the year put an opposite effect on me. I now go outside for play regularly.”

– Matilda, Shanghai

“Play would be more suitable at home in the next five years, because the virus has already showed alarm.”

– Xinyu, Ganzhou

“Life is so boring. Fun is an essential element in my life.”

– Bowen, Shanghai
8 CONSUMER MOTIVATIONS FUELLING THE FUTURE OF PLAY

No longer a ‘waste of time’, play is now a ‘fundamental right.’ Chinese attitudes towards play have evolved as people’s education level and economic status improved over the past decades. While play was once seen as a waste of time and a frivolous luxury, it is now widely considered an effective method of relaxation, socialization and self-improvement that is crucial to one’s quality of life.

Digging deeper, our 360 exploration of play led us to identify 8 consumer motivations that can be placed on a need-state spectrum from purposeful uplift to emotional uplift:

8 Consumer Motivations Fuelling Play

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<thead>
<tr>
<th>Purposeful Uplift</th>
<th>Emotional Uplift</th>
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<td>Learning</td>
<td>Pleasure</td>
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<td>Health</td>
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<td>Productivity</td>
<td>Nostalgia</td>
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<td>Connection</td>
<td>Recognition</td>
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Brands can engage consumers via any and all of these motivations. However, successful engagement will depend on deeply understanding evolving consumer needs and identifying the innovative mode of activation, whether playfulness, playing or playthings, that best suits the brand’s ethos and objectives. Read on to learn more!

Why do we play?

“It comes to my mind as a way to relax, relieve the pressure from work and life, something one would enjoy doing.”
- Garrick, 50

“I think of playfulness as a combination of socialization, lightheartedness, funny moments, memorable moments, relaxation and all over entertainment.”
- Daniel, 31

“When I play games, I think of leisure, relaxation, releasing myself and relieving work pressure.”
- Jane, 48

“Play is a big concept which make people feel happy, enjoy, relaxing, and joyful.”
- Alex, 23
PLAY FOR PRODUCTIVITY

Many adults told us that not only do they play to escape work pressures, but they also see play as a complement to their work as it boosts their overall productivity. Some Chinese parents also view playtime as enabling their school-going kids to be more focused and productive when in the classroom.

“Sports carnivals are becoming the trend for both team building and hanging out with friends”
– Godfrey, Guangzhou

“Play benefits me in all areas, like encouraging me to work with better energy and attitude.”
– Alex, Shanghai

Employees exercising collectively to boost team discipline and morale is a common sight in modern China, and group exercise drills are ingrained in many corporate cultures. Looking ahead, especially as more post-90s and post-95s enter the workforce, we may see more companies replacing these activities with collaborative playtime to boost productivity and teamwork.

Participants showed off their dance moves at an activity sponsored by Fanta at Bilibili World 2020 in Shanghai. Dancers’ mobile phones recorded and ranked their performances, fostering a sense of competition.
Young consumers are flocking to the escape rooms opening up across China’s major cities to play games in which players work together to solve clues and complete tasks so they can ‘escape’ within the time limit. Many escape rooms blend the challenges with immersive theatre and role play, making this activity a great way to develop teamwork and problem-solving skills.

Nintendo’s hugely popular Animal Crossing game enables players to escape reality by creating their fantasy ‘second life’ in the game. The goals of the game are to explore and collect, then build your island and socialize with other players.

**Thought starter:**
If play is a complement to work, are there opportunities for organisations to incorporate dedicated playtime into the workday? How could brands enable more productive play?
PLAY FOR HEALTH

Playing, playfulness and playthings make the quest for physical fitness, self-discipline, inner calm or general well-being more fun and appealing. Many consumers desire greater integration between play and fitness, and 90% of consumers surveyed had used or wanted to use a motivational app.

“As Chinese consumers continue to pay increased attention to preventative health and addressing health concerns, they will seek out more and more engaging ways to stay physically and mentally fit. Playfulness will become a key consideration for partaking and sticking to a healthy regime.”

Ring Fit Adventure from Nintendo is an avatar-based fitness game that combines role-playing with physical exercise.

“I think play that combines with exercise is always good during a workout. It’s always good to have some fun.”

– Alex, Beijing

“I always complain that it is difficult to keep fit. If exercise involves more play, maybe I will find more joy exercising rather than difficulty.”

– Xinyu, Ganzhou

Source: https://www.nintendo.com/
Xi’an Quantum Morning Block focuses on new concepts such as video gaming competitions and electronic music, influencing the lifestyle of new Xi’an youth. Here, community members come together in the space for a fun morning workout.

China’s millennial and Gen Z consumers are increasingly interested in mindfulness meditation apps like Now 冥想. These apps incorporate gamification such as weekly and monthly challenges to encourage users to stick with the program during the crucial first few weeks of new habit formation.

Thought starter:
Most brands can tap into consumers’ desire to form healthy habits through play and become a key part of their new routines. What are some activation ideas you can think of for your brand? Who could you partner with?
Play helps adults and children alike to hone new skills, build desirable character traits and gain more knowledge, often with less pressure and better outcomes than conventional learning. Our trendspotters highlighted the rise of children’s games and activities designed to promote holistic development.

“Most of my friends play for relaxation. But for now, as we are university students and close to graduation, some of us also play for skills acquisition, like coding.”

– Jessie, Shanghai

“For my child, it is about creativity building, because I find the games he plays is not easy, sometimes he needs to think and react properly.”

– Changqing, Haikou

“The latest trend in Xi’an for children is YanXue 研学, usually organized by schools. They take children to museums or other tourist attractions, giving children the opportunity to learn while playing.”

– Ruina, Xi’an

Faced with so many competing demands for consumers’ attention, playful mechanisms and elements - not static one-way communications - offer marketers a highly effective approach to educate consumers. We see a growing opportunity to develop truly valuable, interactive experiences to promote brand education in the future.

The OPPO R75 Flash Charge Experience launch used H5-based mobile gamification to promote the new product features.
Shanghai Planetarium (scheduled to open in late 2020) will be Shanghai’s third major science-related museum. Incorporating an IMAX cinema and holographic image technology, it will offer visitors an unforgettable learning experience.

This pen is a next-generation intelligent learning tool aimed at children up to 12 years old. Using optical image and voice recognition technology, it converts pictures into spoken English words so that children can improve their English vocabulary and pronunciation.

Thought starter:
How can your brand use play to educate consumers and thereby drive awareness and trial? What are some emerging technologies you could leverage for ‘play to learn’ in the future?
PLAY FOR RECOGNITION

Play has become a valuable social currency for people seeking to express themselves and gain recognition among their social circles. Young consumers are increasingly turning towards competitive gaming, detailed cosplay and collectible toys and figurines to fulfil the need for online applause and acceptance, and to gain a sense of achievement.

“I think self-expression will become more popular as many Chinese expressed their voice and thoughts through the internet and gaming will becomes a common expression.”
– Xinyu, Ganzhou

“I identity has become the key word when people choose to play.”
– Godfrey, Guangzhou

While a monogram designer handbag was once the ultimate status symbol, rare playful merchandise and follower counts on playful social platforms are gaining value as social currency among Chinese youth. What’s more, they don’t just afford you status, but can also make you rich!

As seen at Bilibili World and China Joy, designer toys are an obsession among young male and female collectors alike. Vertical apps like Xianyu (闲鱼) and Paqu (葩趣) have become online gathering places and commerce hubs for collectors.

Social platforms like Douyin that encourage playful content creation can turn ordinary people into star KOLs who earn money from brand endorsements.

“Douyin is not just a content platform. It is a canvas where you can try to do anything. It is absolutely changing the way people play because people are more active and inspired.”

-Matilda, Shanghai

‘Lolita’ cosplay is popular form of self-expression among female Chinese ACGN tribe members. Many women sport elaborate Lolita costumes as spotted at China Joy where other eventgoers constantly sought them out for photographs.

Source: Douyin
Source: https://www.chinajoy.net/

Thought starter:
What playful social currencies can brands create and own to meet consumers’ need for recognition and to drive widespread appeal?
PLAY TO CONNECT

Play provides a valued opportunity to connect with others; to bond with friends and family and to meet new people. To Chinese parents, game play is crucial to developing their child’s social skills.

Board games and physical games like 老鹰捉小鸡 (Eagle Catches Chicken) are naturally suited to connecting 2 or more people. Yet, in China, online games have a particularly important role in facilitating connection through play as generations of only children seek out like-minded communities or ‘tribes’ online.

“I love playing video games, sometimes alone but mostly with friends. It’s like a mini party online with my friends – we hang out together”
– Alex, Shanghai

“I play games with friends and colleagues to increase communication and deepen mutual understanding”
– Ruina, Xi’an

“I play games with my mum or dad mostly, and I enjoy to play with my mum.”
– Xingyu, Xian (age 6)

We expect to see more fusion social/game play online in the future to meet consumers’ desire for connection as distance and time become greater barriers to playing in-person. Beyond gaming platforms, group gamification will further embed itself in social media, e-commerce platforms and in offline spaces, and connected play will drive user stickiness in all these areas.

Bilibili World 2020 attracted families who enjoyed trying out the many games aimed at augmenting family time as digital gaming companies eyed a growing opportunity to facilitate in-person as well as online connections.
HiPP infant milk formula’s Douyin activation encouraged a playful connection between parents and children. The challenge incorporated brand attributes into dance routines that brought families together.

At the “Hello Corgi” pet café in Beijing’s hip Sanlitun neighborhood, patrons can enjoy afternoon tea in the company of cute corgi dogs. Playful pet imagery is incorporated into specialties like the corgi latte and corgi-shaped glutinous rice dumplings.

The café is a hit amongst young people who love animals, but can’t commit to owning a pet as people crave opportunities to play to connect with both humans and animals.

Thought starter:
Consumers increasingly turn to play to deepen bonding moments and to connect with their ‘tribes’ online. How can brands create new digital and physical play experiences that enable connection – and have a link to sales?
PLAY FROM THE PAST

Ancient and recent history alike provide inspiration for new forms of play. Many adults are nostalgic for simpler times and seek out play inspired by childhood. Pride in China’s cultural heritage is also a powerful emotional driver, and we continue to see more and more playful content, product and experiences that incorporate traditional Chinese elements aimed at younger age groups.

“Young people can often be seen wearing Hanfu in some scenic spots and take pictures. Especially in some colleges, they have Hanfu theme club, and every week they organise activities.”

- Binny, Haikou

“I do enjoy playing old video games I played as a child to satiate the nostalgia craving in me.”

- Daniel, Shanghai

Play from the past enables consumers to escape the stresses of modern day by tapping into cherished childhood memories or being transported to another era. Our trendspotters even admit to buying plush toys to accompany them and give them a sense of comfort and security in difficult moments. We expect to see even more innovations that blend technology and heritage to trigger powerful emotions in consumers going forward.

McDonald’s x Forbidden City Chicken Sharing Box revived Qing Dynasty games capitalizing on Chinese pride to encourage consumers to share a meal and play together.
‘Retro-style’ play takes people back to their childhood and celebrates vintage design. Brands from the game, snack, fashion categories and more were tapping into consumers’ love for ‘old-school’ cool at China Joy 2020.

Hanfu (汉服) – Han-era Chinese clothing has become a huge trend among Chinese Gen Z, spurring the launch of parent-child Hanfu sets, male Hanfu clothing and even Hanfu fashion shows. We spotted a number of Hanfu booths at China Joy 2020.

Source: MediaCom China photos taken at the China Joy event

**Thought starter:**
Which cultural moments from the past resonate most with your audience? Are there elements of your brand’s own heritage that you could blend with aspects of China’s past to connect with consumers?
PLAY FOR NEW ENCOUNTERS

Sometimes what is great about play is simply a change in routine. Trendspotters spoke of this benefit explicitly in terms of ‘freshness’ and ‘newness’. Novelty matters to all ages and genders as they seek a self-reward and welcome break from the drudgery of daily life.

“Shanghai is a city that never lacks new things. People are willing to pay more to get novel experiences.”
– Matilda, Shanghai

“My favourite toy changes a lot. The reason I stop playing with it is that I don’t have any feeling of freshness.”
– Dengsuo, Haikou (age 9)

‘Surprise and delight’ is the guiding principle driving the booming ‘blind box’ segment and other playful innovations that drive consumers’ interest, trial, purchase and loyalty. This ‘play’ opportunity is already popular amongst brands today, and will only grow bigger in the future.

To buy a surprise, buy a blind box! Blind boxes come in various forms from blessing bags to packages in vending machines and can contain anything from toys to books to makeup.

Here are some interesting blind boxes spotted at China Joy 2020.
To achieve 网红, i.e. ‘internet celebrity’, status, brands in China use unexpected and playful brand collaborations that drive social buzz and increase trial among young consumers.

adidas originals announced its ZX8000 sneaker collaboration with LEGO in late 2020. Fans were delighted by the teaser video revealing a special shoebox made of LEGO bricks, while the shoe itself incorporated the playful colours and codes of the beloved iconic blocks.

Dove made consumers’ chocolate purchase even sweeter by collaborating with Molly Doll on a limited edition surprise gift with every purchase.

“I drink Hey Tea almost every day. There is always a new flavour for me to drink every time I pop into the store. I love when it crosses over with other brands for limited edition products”

– Godfrey, Guangzhou

Terraria, the 2D sandbox simulation game and Tencent’s Craz3 Match brought the virtual game environment to the physical world, e.g. wowing fans by building a physical pipe to simulate how props are dropped into the game, at China Joy 2020.

Thought starter:
How could more brands leverage the blind box phenomenon in new ways? What surprising collaborations do you have in mind for your brand?
PLAY FOR PLEASURE

Pleasurable play is spontaneous, unregimented, and purely for the emotional uplift that comes from having fun! Play for pleasure is, by definition, purposeless. Consumers of all ages enjoy getting lost in the world of play and simply being a child or being childlike.

“The definition of play can change over time but I believe the core never changes, which is finding something that makes you really happy.”
- Alex, Shanghai

“Play for fun is socially acceptable for everyone, not only for children. Because, everyone has the right to happiness, and play is one of the ways to make people happy.”
- Zhong, Ganzhou

As leisure time becomes more and more limited, consumers increasingly value opportunities to play for pleasure – something many trendspotters viewed as their ‘right’. Therefore, brands that can offer consumers new ‘peak’ play experiences will likely have the upper hand vs. competitors in the future.

Go-karting and trampolining have gained popularity among Chinese pleasure-seekers. These activities appeal to consumers of all ages and have become a fun activity for families, friends and colleagues alike.

Oreo famously rolled out a DIY music box on Tmall in 2017. Consumers could use the cookies to play different songs, bringing the brand’s slogan “Play with Oreo” to life. The music box was a hit with young consumers and the limited edition package sold out in less than a day. Oreo has built on this success by consistently offering consumers new ways to play.
Virgil Abloh imagined a crew of colorful animated characters, “Zoooom with Friends”, on a global voyage as the concept for his SS21 Louis Vuitton men’s collection. The fashion show in Shanghai blended playful fantasy elements and AR activations to delight Chinese fans.

**Thought starter:**

Even babies play for pleasure, making this the most basic, pure consumer motivation. Yet, it is also one of the most difficult to need to meet for stressed, busy adults. How can your brand incorporate play that sparks pure joy?

**Let’s Play!**

By deeply understanding the diverse consumer motivations fuelling play, marketers can better evaluate brand-motivation fit, and thereby leverage play more effectively to drive brand and business goals. While the reasons why consumers play are consistent over time, ways to activate, whether via playfulness, play or playthings, have huge potential for innovation moving forward.
MEDIA AND EXPERIENCE IN THE FUTURE OF PLAY

Five driving factors

Technology increasingly enables play without restrictions

Technology has broken down the limitations of physical play, enabling play to happen anywhere, any time and with anyone. What’s more, online play enables more efficient and flexible ways to play, which is essential when over 1 in 2 Chinese consumers claim to be under time pressure in their everyday lives. Consumers will continue to dip in and out of play rather than scheduling a set time. Richer data will drive more tailored play and play communities.

Richer data will drive more tailored play and play communities

As people reveal themselves in play, the behavioural data gathered during play is deep and nuanced. Going forward, brands’ ability to meet a broad variety of interests will determine their ability to command a greater share of the play economy. Platforms like Bilibili, Douyin and Kuaishou are already capitalising on rich data to invite in more people who are looking forward to playing differently.

AI and VR will bring people closer together and transport them further through play

Chinese consumers have already embraced AI- and AR/VR-enabled games and devices and their popularity will be boosted by the arrival of 5G internet across China. In the future, more physically-distant friends and families will play together (and with AI-powered avatars) in the same virtual place, which could resemble real life, a far-off country or a fantasy world.

Consumers will continue to value physical play to unplug and recharge

As consumers spend more time online completing work and personal tasks, they will continue to turn away from screens and embrace offline play as a way to relax, bond with others and enjoy the outdoors. Even the most sophisticated digital options won’t completely match the joy derived from a board game with friends, a rollercoaster ride or a toy figurine collection.

Multi-purpose spaces will blur the lines of where play starts and stops

Play is a driving force behind the ongoing fusion of leisure, gaming, entertainment, lifestyle and commerce in a single digital platform or physical space. We expect to see even more gamification and playful content on social and e-commerce platforms and more places like Shanghai’s TX Youth Centre and Beijing’s SKP South Mall to open and become a gathering spot for consumers across China.
MARKETERS AND MEDIA ON THE FUTURE OF PLAY (PART 2)

We asked our valued clients and media partners to share how they see Chinese consumers’ desire for play evolving and how their brands are exploring growth opportunities in the play economy. Here’s what they had to say:

“In the post-epidemic environment, group online gaming and watching livestreamed gaming have become the social habits of more and more players, and enriched personalized e-sports content greatly satisfies users’ emotional needs outside of work and study.

In 2020, Chinese e-sports users are expected to exceed 400 million, and China’s total revenue will surpass North America for the first time, giving China the largest share of the global e-sports market at 35% of total global revenue. As a leading global game equipment brand, ALIENWARE maintains close cooperation with mainstream live broadcast platforms and game anchors. As the official machine for the League of Legends 2020 Global Finals, it attracted the attention of avid players and triggered a wave of machine replacement at the end of the year.”

Lei Pan, ALIENWARE Marketing Manager, Dell China

“We see more & more consumers of all ages spending more time engaging with playful content, gaming and activities online in order to relax, recharge and celebrate the small moments, similar to the reasons why they turn to snacks and treats. There’s a big opportunity for MARS brands to complement and enhance consumers time with playful media, e.g. eating M&Ms while watching the latest Spiderman movie or chewing gum while playing online games.

The snacks and treats category is increasingly fragmented and competitive as brands across segments fight for “share of mouth” via product innovation, brand communication and consumer engagement. MARS is focused on driving greater relevance with Chinese consumers especially connecting with Gen Z – the core target group of “the future of play”. We are constantly innovating to create and own more moments through partner collaborations and consumer-led content integrations to satisfy consumers’ hunger for playful treats.”

Kindy Lei, Media Director, Mars Wrigley China

“Chinese GenZ are very willing to spend time on entertainment which can increase their self-satisfaction such as gaming, animation, music, travelling, etc., and they’re keen on sharing those interesting experience in social media or vlog site. Sony, as a creative entertainment company with a solid foundation of technology, can enrich Chinese GenZ consumer’s experience with industrial-leading products, such as game-optimized TV that bring immersive experience in video & audio enjoyment, 360 RA and Hi-Res headphones that can bring live concert to you, pocket-size vlog camera that can vividly record exciting moments and easily share to social media. Sony is also well known in the entertainment industry with movie, music, game and animation business. We can seamlessly deliver content creator’s purpose to Chinese customer through our advanced digital products. We believe Sony products can help customer stay inspired, amazed and empowered during their playful event.”

Tadato Kimura, Vice President, Marketing Group Head, Sony China
HOW BRANDS CAN GAIN "C 位" IN THE FUTURE PLAY ECONOMY

To gain C 位, i.e. the top spot, in the play economy, marketers must carefully consider how to leverage the different play motivations and types of play in order to build deeper consumer connections that grow their brand in China. Through our 360 exploration of this topic, we have identified five strategic approaches to enhance the consumer purchase journey through play:

- **Play to boost awareness and interest**
  By (re-)inventing brand image to be more playful, marketers can effectively grab young consumers’ attention and deepen affinity towards their brand and products. Media selection is crucial to reaching target audiences when and where they play: short video platforms like Douyin and Kuaishou, tribe gathering spaces like Bilibili and vertical apps as well as popular animation series and video games are key digital playgrounds, especially for post-90s and younger Chinese consumers.

  “I do like it when brands are playful. It not only attracts my attention but also sparks my willingness to buy.”
  – Matilda, Shanghai

  To be successful, brands must develop communications that fit the playing style of each platform. Going beyond one-way advertising, marketers should seek new ways to deploy stickers, filters, challenges, mini-games and in-content integrations to build up a playful brand image and deepen brand engagement through play.

- **Play to reinvigorate retail spaces**
  Shopping is increasingly less mission-focused and instead a source of entertainment for many Chinese consumers: 46% say they shop for fun, rising to 56% among 25- to 34-year-olds. Incorporating playful elements and interactive technology across the retail space, e.g. eyewear brand Gentle Monster’s unique in-store installations, or establishing dedicated in-store play areas, whether for adults or children, can attract more consumers into your store to discover and then purchase your products.

  “The shopping centre in my neighbourhood has rebuilt its central arena as a community open air theatre, and they constantly introduce activities in this space to retain returning customers.”
  – Garrick, Shanghai

  Brands facing low or falling foot traffic at their physical retail stores should use play to renew and refresh the in-store experience, turning a store visit into a memorable occasion vs. a routine chore.
## Play to drive purchase

Gamification in e-commerce, e.g. Taobao Xiaoxiaole in which consumers can play in-app games for rewards, is an increasingly popular way to engage consumers in play to win coupons or gifts. Many offline stores are also incorporating similar playful activations like lucky draws to attract consumers and trigger sales. While play is becoming a common tool to incentivize purchase, brands should further explore upper-funnel opportunities to educate and inspire consumers via gaming and other types of play that lead to purchase without relying on discounts.

“In terms of brand shopping, I will be very interested if the game is associated with coupons. Luckin Coffee has a shareable game - people can get at least 30% off discount coupons when they play the games in Luckin’s WeChat mini program.”

– Vicky, Beijing

Adding excitement to the shopper journey through play can move more consumers down the purchase funnel faster. However, brands should strike a balance between types of play that add to overall brand value and promotion-driven play that could erode consumers’ long-term willingness to pay.

## Play to peak the product experience

Young consumers don’t want to just buy innovative products and services, they want to play with brands to co-create them: 69% percent of teenage consumers say they would like to be part of the process of their favourite brands creating new products. Inviting consumers’ input into the product development process, offering playful customization options, and providing opportunities for playful self-expression using the product, e.g. Oreo’s music box or Lays’ ‘Crunchy Sounds’ lip sync Douyin challenge, can drive brand perception, word of mouth, and sales.

“Brands are becoming more playful these days. I like it a lot because entertaining products can make brands more interesting.”

– Alex, Beijing

Tapping into Chinese consumers’ desire to co-create across their many, varied motivations for play can spark product and service innovations that help brands stand out in the increasingly competitive Chinese marketplace.

## Play to build consumer loyalty

Chinese consumers expect brands to reward their loyalty with creative and personalized rewards. In fact, 72% of respondents preferred gifts or treats from brands vs. loyalty points. Beyond offering play-filled perks, constantly partnering for new playful collaborations, e.g. Adidas, launching new playthings, e.g. POPMART, and helping consumers progress towards goals through play, e.g. Nintendo Ring Fit, can also help brands cultivate a loyal consumer following.

“The higher the playability, the more willing people are to consume”

– Yu, Xi’an

Whether a surprise gift with purchase or a gamified learning experience, the playful elements should be unique, captivating, and delightful to create value that keeps consumers coming back to your brand.
Chinese consumers are seeking out more playful ways to spend their time and money. Going forward, play will be an increasingly powerful tool for marketers to grow their brands’ share of Chinese consumers’ hearts, minds and wallets.

Successful activation depends on determining the right ‘motivation-mode-medium’ fit for a given brand’s ethos and goals:

1. To start, marketers need to investigate and then define which consumer motivations for play are most relevant to their brand values and brand identity.

2. Considering their target audience, product attributes and marketing objectives, they can identify the most suitable modes - whether playfulness, play or playthings – through which to activate.

3. Then, marketers should look for innovative ways to bring branded play to consumers, e.g. new ways to activate in partnership with playful media platforms, content titles and other brands.

4. By designing a holistic play-centric consumer experience that encompasses communications, content, commerce, product marketers can leverage the full potential of play for competitive advantage in the aggressive Chinese market.

China’s giant playground is full of possibilities with huge potential – is your brand ready for playtime?

Thought starter:
Why don’t you use play to spark some creative activation ideas with your very own ‘cut out and create’ plaything? turn the page to start playing!
THE SECRET LANGUAGE OF PLAY IN CHINA REVEALED!

Our trendspotters shared some of the lesser-known slang terms that originated from play, especially online gaming, and are now entering mainstream conversation. Naturally incorporating these codes into communications can help brands to establish relevance and build connection with their target audiences.

### 浪得飞起 (Lang de fei qi)

“Wandering” is a phrase to describe activities that involve a lot of play. For example, when someone takes a month off to go on a vacation.

### 吃鸡 (chi ji)

“Eat chicken” is inspired by the American movie ‘21’ set in a Las Vegas casino. The original phase was “Winner Winner, Chicken Dinner” a phrase to bring luck prior to gambling.

### Hai

A popular present day saying in China, “Hai”, which sounds exactly like “high” in English, means to reach an emotional peak by having fun.

### C位 (C wei)

‘C stand’ indicates the most important position in a game and in life, i.e. the top spot.

### 开黑 (kai hei)

“Open black” refers to playing an online game in a group.

### 666

is used to describe someone or something fabulous. For example, if you make a “PENTA kill” in the King of Glory game, your teammates may send you a ‘666’.

### “ETC”

Electronic Toll Collection in Chinese can be said as 自动抬杠机 (zidong taigang ji) referring to the automatic barrier that lets cars pass. 抬杠 (tai gang) means “raising the pole” but it can also mean “wrangling with others” especially without logic or evidence. So calling someone ‘ETC” – typically during heated discussions on social platforms – means calling them someone who argues without consideration.

### 硬核 (y ing he)

is often used in gaming chats and simply means hardcore!

### 私享家 (si xiang jia)

is pronounced similar to ‘The Thinker’ in Chinese, but the phrase literally means ‘a man who enjoys himself.’ It’s used to describe someone who seeks out new places to play, but doesn’t like to share them with others.

### 玩转 (wan zhuan)

means someone who has great passion for a game and knows how to play it very well.
A TOY TO INSPIRE PLAYFUL IDEAS FOR YOUR BRAND!

Assembly instructions:

1. Cut out the shape along the outline
2. Fold forward along all the solid diagonal lines
3. Fold backward along all the dotted vertical lines
4. Apply glue to the big flaps
5. Paste them onto the inside of the opposite side to form a tube
6. Apply glue to the small flaps and paste inside to turn the shape into a ring
7. Wait for the glue to dry and you are ready to play!

Play instructions:

1. Flip the shape around for 30 seconds to 1 min
2. Which words stood out to you? Write down:
   a. One word in black text (consumer motivation)
   b. One word in white text (brand objective)
   c. One word in dark red text (activation type)
3. Challenge: can you think of a brand idea using these three criteria?

Use the blank shape to create another ideation toy for your specific needs!
Marketers have never lived and worked in more exciting, opportunistic and uncertain times. How can you stay on top of the newest ideas, the latest trends and the most successful content and connections? It’s easy:

Subscribe to our monthly BLINK newsletter.  
www.mediacom.com/blink

If you want to discuss the specific opportunities for your brand in the future of play, or to learn more about how MediaCom can help your business grow, please contact us:

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