

CONNECTING WITH FUTURE CONSUMERS

CHINESE WOMEN IN 2030



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MEDIA. CONTENT. TECHNOLOGY.



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INTRODUCTION

As China grows into the world's Number 1 economy, China's women are on a surge. Millennial girls (born in the 80's and 90's) grew up during the boom years of double-digit growth in China as only children doted on by parents and grandparents. They laid the ground for a new model of femininity with their independent, confident-striving and outspoken style.

Girls are outperforming boys in school, accounting for more than half of all undergraduates in China in 2015. This number might be even higher were it not for the affirmative practices implemented by many universities to let more boys in^{*1}. They are major players in the economy: In 2017, 61.5% of women participated in China's labor force, contributing some 41% to China's GDP, a higher percentage than in most other regions, including North America^{*2}. Government data shows that women set up 55% of new internet companies in China and more than a quarter of all entrepreneurs are women^{*3}. On the consumption side, they buy millions of articles on Taobao, China's leading e-commerce platform, and turned Alibaba's Singles' Day into the world's most valuable day for retailers. Jack Ma, founder of Alibaba, speaking at the 2017 Global Conference on Women and Entrepreneurship, called women the "secret sauce" of Alibaba's success, adding that he wished to become a woman in his next life^{*4}.

Over the last 30 years, a soaring economy and changes to the laws regarding education and employment have meant big changes to women's rights and status in China. But where are Chinese women going next? Given their importance in the economy as both leaders and consumers, brands need to be able to anticipate the trends that will influence women.

This study looks at where China's girls and young women today will be in 2030. Women are evolving as part of China's fast changing society, and brands need to better understand what motivates and drives them, in order to engage with them in a positive way.

SETTING THE CONTEXT

China's population is expected to reach its peak in 2029, growing from the current 1.418 billion to 1.44 billion and then declining from 2030 onward. The male / female imbalance that has sprung from the one-child policy, resulting in some 30 million more men today, is expected to balance out by that point. Despite the relaxation of the one-child policy in 2016, its shadow extends into the future: over the next 10 years, the number of Chinese women aged 23-30 will decrease by 40%, a huge drop in this child bearing age group⁵. At current fertility rates (circa 1.5%) this means about 8 million births per year, although the government actively promotes births and might start to incentivise births via tax and education reforms. Fewer births and longer life spans mean a greying population; by 2027, an estimated 100 million people will have joined the ranks of those over the age of 60, representing 22% of the population. This means an increased burden on working adults but also new consumption opportunities.



These are the Chinese women who are

- 18-40 years old in 2030
- From Tier1-3 cities
- From middle to high income levels (>8,000RMB Monthly Household Income)

METHODOLOGY

This paper was developed based on the research conducted between September 2018 and March 2019, which included Kantar Consulting's proprietary consumer research Global MONITOR (A quantitative study conducted in over 20 countries, tracking changing consumers' attitudes, values and behaviours on an annual basis), as well as existing trends, futures and generational studies and research reports. Additional insight was provided by secondary research, which included the review of existing intelligence and published international and Chinese sources. 10 expert interviews were also conducted to add depth and nuance to the social trends explored, with an eye to identify early signals of change that point towards likely shifts in women's values, attitudes and behaviors.





EXECUTIVE SUMMARY

Delivering transformative solutions through media, content and technology for brands globally, **Wavemaker was founded with the mission to "Make the Future"**. Of course making the future in the short-term in China requires huge agility to keep on top of the very fast-changing consumer and marketing opportunities, and agility is a core value of Wavemaker. **Against this dynamic, we chose to take a Year 2030 perspective in this whitepaper** in the appreciation that brands that will stand the test of time need to build their capabilities to connect with Chinese consumers in the longer-term.

We also chose to focus on China's women - they are on a surge as major players and key drivers of consumption in what is soon to be the world's largest economy. With appreciation that consumption starts at an ever younger age, we have **identified how current schoolgirls 6-17 years old and current GenZ 18-28 years old, as future recruitment targets and retention targets respectively, will shift as consumers from now to 2030**. It is worth noting at this point that whilst we can already observe early signals of the expected shifts amongst pockets of consumers in higher tier cities, our lens for viewing this future is based on a holistic viewpoint of mainstream affluent women across China.

To arrive at this vision of the future, **we have identified 12 key drivers of change in China between now and 2030**, covering economic, environmental, political, social and technological forces **impacting on Chinese women's values, attitudes and behaviors in future across ten dimensions under the themes of identity, work and play**.



IDENTITY IN 2030

Chinese women are moving away from juggling conflicting roles according to societal expectations and are **expected by 2030 to show a more consistent self-identity that capitalises on their individualism and purpose**. With the rise of individualism and independence, Chinese women are also pursuing more meaning and purpose in their relationships. By 2030, women will be able to curate longer-term and more global friendships according to common ideals, driven by the continued advance of big data, AI and virtual reality. Love, too, is moving towards a desire for true love, compared to what is currently in the mainstream more a focus on marriage based on good material foundations. At the same time, **technology is expected optimize more shorter-term on-demand needs**, whether related to friendships, dating or indeed sex.

Family, Chinese society's backbone for millennia, is undergoing seismic shifts and we expect the notion of the traditional family structure will not exist in the future. Further assisted with AI and the sharing economy to alleviate household chores and care, the current burdens placed upon the shoulders of the wife/mother in the family will be eliminated and replaced with family life focused on enjoyment in 2030. Accordingly, **mothers will become more of a friend than authoritative figure to their child as mother-child relationships will level**.

Externally, individuality is informing attitudes to beauty. By 2030, when appearances are easily modified thanks to technology and the digital-physical boundary is blurred, **beauty is expected to be tailored to suit one's personality and diverse, limited only by one's creativity**.



WORK IN 2030

With their independence on the rise, Chinese women are already challenging the barriers of equal opportunities to their male counterparts in the workplace today. **By 2030, women will achieve financial independence with women's leadership in business considered normal**. In fact women are expected to progress ahead of men in the work place, with digital disruption and automation favoring new skill sets that are irreplaceable by automation e.g. empathy or creativity where women hold an advantage.



PLAY IN 2030

A new sense of purpose will guide how women spend their time and money. Status will move away from current superficial signifiers like wealth and social-media popularity to **status in 2030 being defined by sophisticated intangibles like education, wellbeing and connoisseurship, as well as one's positive impact on society**. Leisure activities that combine individual passions and social causes will also be increasingly common.

Facilitated by the growth of the sharing economy and algorithms, women will be more selective when choosing items they want to own. **By 2030, whilst low-involvement categories will receive even less attention** as predictive shopping services become the norm, **high-involvement categories will become even higher involvement**, focused on hyper-personalisation and the meaning and individuality products bring to the consumer.

To win in the future, brands need to acknowledge these above shifts and better connect with women by accompanying them on this journey, and we hope our brand implications and "what if" ideas for each theme act as inspiration for your own thinking for this endeavor. Indeed as Wavemaker ourselves, we continue to push our own capabilities, expertise and people to continue to partner with the best brands to "Make the Future".



HOW IS THEIR WORLD CHANGING

DRIVERS OF CHANGE

We have identified 12 key drivers of change that will have great impact on the lives of women in 2030, shaping their future destinies in how they work, live and play:



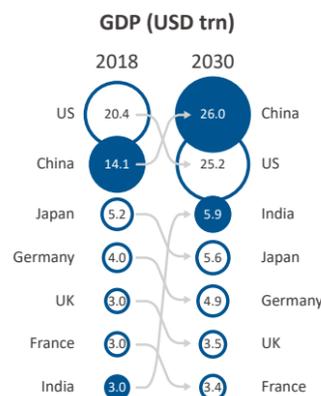
01 POWERHOUSE CHINA

China is moving towards equaling the US in both its economic power and military reach. By 2030 it will be the leading world power. It will also play a more visible role on the global stage and will continue to be a strong promoter of cross-border trade as it further integrates into the global economy. China will be home to the world's largest middle class and will reshape global consumption. Over the next decade, consumption will grow by an average 6% annually to reach RMB 56 trillion (\$8.2 trillion)^{*1} and this growth will be driven largely by women – hence the role of women consumers will be even greater than it is today.

Chinese brands will continue to gain domestic recognition as well as grow their global influence. By 2030, Made-in-China will be on-par with, or even superior to international brands. Consumers will evolve from their relatively price-sensitive mindset to a more premium-seeking attitude, but distinctions between Chinese and Western lifestyles will remain. The choices women will make as consumers will be of major impact on their families.

NO. 1 ECONOMY IN 2030 AND KEY CONNECTOR FOR GLOBAL TRADE

2030:
Long-term global GDP rankings



Source:

*1 Future of consumption in fast-growth consumer markets: China, World Economic Forum, 2018

CHINESE BRANDS INCREASINGLY PREFERRED IN AND OUT OF CHINA

International vs Chinese brands scores on the BrandZ Brand Power metric



CHINESE WOMEN IN 2030

02 INCREASING GLOBAL EXPOSURE

With both international travel^{*2} and education on the rise (608,400 overseas students in 2017^{*3}), young Chinese are increasingly exposed to the world. This is accompanied by overseas work experiences (Chinese green card holders in the US have doubled over the last decade^{*4}), whereby many of those studying and working abroad eventually return to China, where opportunities abound. This increasing exposure to global culture may challenge existing Chinese gender norms and stereotypes, and in the near future, lead to a paradigm shift in the way Chinese culture views women.



Source:

*2 China Outbound Tourism Research Institute, 2018 & Marketing to China, 2018

*3 2017 sees increase in number of Chinese students studying abroad and returning after overseas studies, Ministry of Education of the People's Republic of China, 2018

*4 Number of persons obtaining legal permanent resident status in the U.S. in 2016, by country of birth, Statista, 2018

GROWING CHINESE STUDY, WORK ABROAD AND RETURN

608K

Chinese students studied abroad in 2017 vs 400K in 2012

81,772

Chinese green card holders in the U.S. in 2016 vs 40,568 in 2003

84%

studying abroad returned to China in 2017 vs 10% in 2001

INCREASING INTERNATIONAL TRAVEL WITH HIGH PREVALENCE OF WOMEN

400 mil

increasing 156%

Overseas trips by Chinese travellers by 2030 vs 156 mil in 2018

56%

of Chinese travelled overseas female in 2016 even though females only make up 48% of the population

03 | GROWTH OF URBAN LIVING

In 2030, close to 70% of China's population will reside in urban areas, with more urbanization occurring in inland provinces and in tier 2 and 3 cities instead of in saturated coastal megacities^{*5}. Advances in technology will enable and support this shift, ultimately resulting in better consumption and lifestyles. As early as 2020, 50% of new residential buildings will comply with green building standards^{*6}. Living arrangements are set to evolve too, with solo or communal living on the rise amongst younger generations^{*7}, potentially transforming family structures. This will shift the traditional view of women as mothers.



GROWTH OF URBAN POPULATION

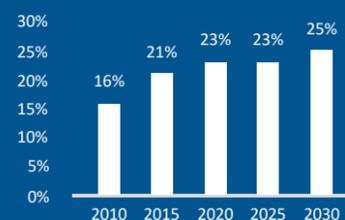
68%
will be urban in 2030
vs 58% in 2017

HIGHLY CENTRALIZED

80%
GDP will be generated in 19
supercity clusters in 2030

RISING OF SOLO LIVING

Estimated % of one-person
households among total
households in urban areas in
China



Source:

*5 China in 2030: The Future Demographic, Euromonitor International, 2018

*6 A Review of Green Building Development in China from the Perspective of Energy Saving, Zhang et al., Energies, 2018

*7 Living Alone in China: Projection of One-person Household, 2010 to 2050, W. Jean Yeung et al., 2016

04 | AGEING POPULATION

China will move from a relatively younger to a relatively older and ageing population, with the median age rising from 37 in 2015^{*8} to 42 by 2030^{*9}, life expectancy growing by 2 years^{*10} and a persistently low fertility rate at 1.66^{*11}.

Whilst the sheer number of elderly people (324 million) will pose challenges to economic growth, new needs of this demographic from healthcare to assisted living will also create economic opportunities. At the moment women still fulfill the major role in caring for the elderly. The outlook for Chinese women in 2030 will depend on how Chinese society responds to the economic and social challenges of an aging population.

RISING MEDIAN AGE IN CHINA

Median age in China
37 years 2015 **42** years 2030

INCREASING LIFESPANS

Life expectancy in China increasing

76.5 years 2018 **78.5** years 2030

PERSISTENTLY LOW FERTILITY RATES

Average No. of children per female
1.55 2018 **1.66** 2030

Source:

*8 World Population Prospects, United Nations, 2015

*9 China in 2030: The Future Demographic, Euromonitor International, 2018

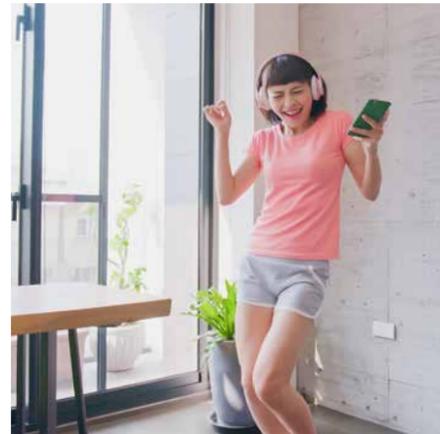
*10 China overtakes U.S. for healthy lifespan: WHO data, Reuters, 2018

*11 World Population Prospects, United Nations, 2015



05 | GROWING SEARCH FOR A BETTER LIVING

Health and wellness are increasingly seen as a key to happiness beyond material satisfaction, with young women leading the search for a better quality of life (29% of young high income women picked "physically healthier" as their top choice when asked about happiness levels, twice the global score^{*12}.) Wellness is on the upswing with running and yoga exploding across China (the sports industry is set to triple in size by 2025^{*13}) and sustainability is on the agenda. Technology, such as blockchain, is increasingly used to track products and assure consumers of provenance and safety^{*14}. The holistic search for happiness also has a spiritual side with young Chinese seeking fulfillment through traditional values and practices such as Zen (Chan in Chinese) and Buddhism (the number of Buddhists in China more than tripled over the last 20 years to an estimated 18%^{*15}).



HEALTH AND WELLNESS INCREASINGLY KEY TO HAPPINESS

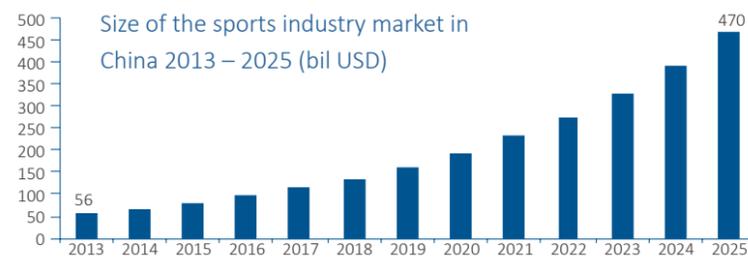
29% vs 14% globally

Young high income Chinese women picked "being physically healthier" as their top choice when asked "what would need to change to make you happier than you are today"

Source:

- *12 Kantar Consulting Global MONITOR Survey, 2018
- *13 Size of the sports industry market in China from 2013 to 2025, Statista, 2018
- *14 The Blockchain chickens bringing the future to free-range, SixthTone, 2018
- *15 Life in Purgatory: Buddhism Is Growing in China, But Remains in Legal Limbo, Time, 2016

GROWING SPORTS INDUSTRY



06 | POLICIES IMPACTING WOMEN

Current policies promise women access to equal opportunities by 2030 in "strengthening their employment and entrepreneurship capabilities, supporting return to work after maternity leave, and encouraging employers to help balance work and family."^{*16} Yet China's new two-child policy has resulted in employers discriminating against women when hiring^{*17}, and women are currently mandated to retire 10 years earlier than men at age 50-55^{*18}.

RETIREMENT POLICIES LIMITING THE LENGTH OF EMPLOYMENT FOR WOMEN

Current retirement age

50-55 years **60** years
Women Men



Source:

- *16 China's National Plan on Implementation of the 2030 Agenda for Sustainable Development, 2016
- *17 China's two-child policy is having unintended consequences, The Economist, 2018
- *18 Chinese Women Want Same Retirement Age as Men, China.org.cn, 2003

07 | RISE OF WELL-ROUNDED EDUCATION

Young women in their 20s and 30s in 2030, would have grown up under a more holistic education system focused on play^{*19}, skills, sports^{*20} and arts^{*21} as well as overseas education^{*22}. As a result, they will have a broader and more international outlook. At the same time, The private education industry will grow 9% annually and will be worth 330 Billion USD by 2020^{*23} as parents spend on supplementary classes outside of school to enhance their children's competitiveness.

ROBUST PRIVATE EDUCATION

9% annual growth of private education industry

OVERSEAS EXPOSURE FROM YOUNG

10% consumers who booked overseas study tours through a major Chinese travel agency were **pre-schoolers** in 2017



Source:

*19 The Power of Policy: Changing the Anji County Educational Ecology, Medium, 2017

*20 Sports education: football training programs blossoming in schools, Ministry of Education of the People's Republic of China, 2018

*21 State council seeks to enhance arts education in China, The State Council of the People's Republic of China, 2015

*22 Overseas study tours for pre-schoolers: China's latest parenting trend, South China Morning Post, 2017

*23 China's private education market set to reach \$330 billion by 2020, Consultancy Asia, 2018

08 | SMART CHINA

By 2030, China will become a global leader in digital technology and Artificial Intelligence, driven by state investment in innovation. In 2017, China accounted for 50% of global investment in AI^{*24}. China's technology giants will have increasing influence and more automation will occur to create a smart and seamless world. The adoption of artificial intelligence will close, or even potentially eliminate gender inequality in work as a new gap between human vs. machine emerges and machines take up a major part of the jobs we know today.

LEADER OF ARTIFICIAL INTELLIGENCE

China aims to become the global leader in Artificial Intelligence by 2030 through increasing levels of national investment in AI

% of global AI investment by China

39% 2016

50% 2017

2020 Catch up to current leaders

2025 Make key AI breakthroughs

Increase investment



Source:

*24 China takes the crown in AI funding, Financial Times, 2018



09 | DATA-LED LIVES

5G infrastructure and big data will increasingly play a role in the daily lives of Chinese consumers^{*25}. By 2027, China may have fewer than five companies controlling most of consumer data; they will extract, process, refine, value this key resource. Yet data privacy is a lesser concern in China vs. globally^{*26}, perhaps explained by relatively fewer data breaches^{*27}. Big data will also help companies personalise products and service and power IoT devices to assist women in all manners of responsibilities in the home.

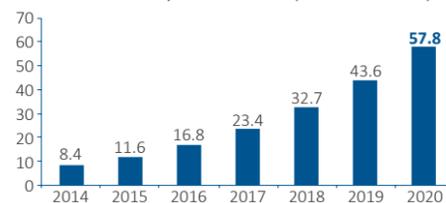
RISE OF 5G NETWORKS AND INCREASING USE OF IOT DEVICES

No. 1 5G market by 2025

1/3 of global IoT market by 2025

GROWTH OF BIG DATA INDUSTRY

Forecasted market size of the big data industry in China (in bil RMB)



Source:

*25 China – the world's biggest 5G market in 2025, Telecom Asia, 2018

*26 Kantar Consulting Global Monitor Survey, 2018

*27 2017 Annual Infographic, Breach Level Index, 2018

CHINESE WOMEN IN 2030

10 | RISE OF THE SHARING ECONOMY

The sharing economy, which took hold in China through phenomena like cab app Didi, quickly spread to anything from umbrellas to housing, is set to grow at a rate of 40% annually and could account for 20% of China's GDP by 2025^{*28}. Paying for sharing rather than ownership makes sense for a generation growing up in a slowing and competitive economy, but it also reflects changing mindsets. Young women are leading over men by 60% to 53% in agreeing that "prioritizing experiences over material possessions" is extremely or very important^{*29}. By 2030, the definition of consumption will continue to move beyond ownership even if consumption itself remains a key signifier of social status in China.

HIGH GROWTH POTENTIAL

40%
predicted annual growth

20%
of China's GDP by 2025

PRIORITIZING EXPERIENCES OVER MATERIAL POSSESSIONS

Young women are leading over men by **60% to 53%** in agreeing that "prioritizing experiences over material possessions" is extremely or very important.

Source:

*28 China's revealing spin on the sharing economy, The New York Times, 2017

*29 Kantar Consulting Global Monitor Survey, 2018



11 | SOCIAL LIFE FIRST

Rising usage of social media platforms and the increasing influence of social networks are creating an entire eco-system of digital platforms and services centered around social - from digital identities^{*30} to social commerce^{*31} to social credit systems^{*32}. By 2030, social life will take precedence. The influence of their social networks will reshape how young Chinese women view themselves and how they interact with the world at large.



Source:
 *30 A look at China's push for digital national ID cards, South China Morning Post, 2018
 *31 China's young consumers don't just want to shop online – they want to be entertained while doing it, South China Morning Post, 2018
 *32 China's social credit systems are highly popular – for now, Mercator Institute for China Studies, 2018

12 | BLURRING REALITIES

The growing adoption of virtual and augmented reality technologies^{*33} and seamless online-to-offline retail models^{*34} is blurring digital life and physical reality. By 2027, online channels will have an even wider reach and retailers will invent new roles for offline channels to create seamless online-offline integration. Hema Supermarkets by Alibaba for example already blend online and offline shopping to offer a more convenient experience^{*35}. Payment is cashless, enabled by mobile scan or facial recognition. By 2030, digital life and reality will be substantially integrated, particularly in consumption and leisure activities.



Source:
 *33 VR Demand in the mainland to surge past US by 2021, South China Morning Post, 2017
 *34 Market GMV of to-shop O2O in China from 2012 to 2019 (in billion yuan), Statista, 2018
 *35 Betting On Brick-And-Mortar: Alibaba's Billion-Dollar Retail Experiment, Forbes, 2017

DRIVERS IMPACT ON WOMEN'S WORLD

The advent of the Fourth Industrial Revolution, where technology is transforming entire systems of production, distribution and consumption is seeing the thriving of Chinese women. Shifting global forces are propelling the world's second-largest economy to take prominence on the world scene as it poises to become the number one world power by 2030, and Chinese women are uniquely positioned to profit from these developments.

Emancipated from a patriarchal society during the early communist era (Mao Zedong famously said that women held up "half the sky") the decades of economic reform and opening starting in the late 1970's further supported their independence. Growing up as the only children, they enjoyed undivided attention and resources from their families, while double-digit economic growth provided opportunities. They lead over men in terms of foreign travel/exposure and language skills, both valuable factors on the labor market. Today, the Chinese government estimates females found more than half of new Internet companies and more than a quarter of all entrepreneurs are women^{*36}. In the U.S., only 22% of start-ups have one or more women on their founding teams. Equally, the venture capital industry, which in the U.S. has been a private men's club, is much more of a meritocracy for women in China^{*36}.

At home, technology is easing the burden on women as by 2030, China aims to become a global leader in digital technology and artificial intelligence^{*37}. Smart homes and convenient O2O shopping will make running a household seamless and convenient. While this is a global phenomenon, the adoption of artificial intelligence is moving much faster in China where cashless payment is already the norm, and online and mobile shopping are ubiquitous. Technology might even eliminate gender inequality as a new gap between

human vs. machine emerges.

Women are also leading the search for a better quality of life as health and wellness are increasingly seen as a key to happiness beyond material satisfaction. They are natural leaders across the wellness industries and are key drivers of sustainable practices^{*38}. However, there are also a number of rising pressure factors affecting women. China's greying population is a general burden on the young generation but especially on women who are still often cast in the role of caregivers, on top of being expected to also act as main caregivers for their child(ren), at least in the foreseeable future.

Their progress will be influenced by government policy and inherent traditions that form considerable societal pressure. Despite apparent equality on the labor market, there has been a persistent wage gap between women and men and China's new two-child policy has resulted in employers discriminating against women when hiring. Also, at present, women are mandated to retire some 10 years earlier than men. However positive government action is seen in recent policy which bars employers from asking for women's marriage status and children during the interview process.

As much as women in China enjoy good education equally to men, and are as a result well positioned when entering the work force, there are still time-old expectations for them to get married and bear children by the age of 26-27. These pressures cause tension as women increasingly seek to control their own destinies.

The following section will look at Chinese women in 2030 through the lens of identity, work and play to gauge the impact these different drivers will have on them across various aspects of their lives.

FAST FORWARDING TO 2030

So where can we expect women to be a decade from now? Current evidence seems to suggest that progress for women will continue to be slow but steady. Future policy in China will be critical in shaping women's rights and opportunities, and there are no indications of major change affecting women's lives.

Chinese women's reality in 2030 can be understood from 3 main angles. Firstly, by looking at how they will formulate their identity; starting with their self-identity, including their attitudes to beauty, and going on to what place friends, family and love will occupy in their lives. Secondly, examining the world of work and how women will define and go about achieving success in their careers, as well as what career paths will be open to them. Finally, looking at the notion of play in 2030; probing to see what status will mean to women, what role consumption will play in their lives as well as what they will be doing with their leisure time. Understanding women's drivers and aspirations will shed light on some distinct ways brands can better connect with them.

Source:

*36 How Women Won a Leading Role in China's Venture Capital Industry, Bloomberg, 2017

*37 China's AI Agenda Advances, The Diplomat, 2018

*38 Kantar Consulting Global Monitor Survey, 2018



IDENTITY

Chinese women are moving away from juggling conflicting roles towards a more consistent identity that capitalises on their individualism and capabilities. They increasingly delay marriage and having kids and flock around outspoken role models that exemplify strength and irreverence. Even gender labels are becoming less central to their identity. One thing that is not changing is Chinese Women's pride in being Chinese and the importance they attach to certain traditional values like humility, harmony and balance.

With the rise of individualism and independence, Chinese women are also pursuing more meaning and purpose in their relationships. Friendship provides a sense of belonging and "sisterhood" to this generation of only children. Digital technology enables "Guimi" (Besties) to engage in social activities online such as virtual shopping or gaming. By 2030, women will be able to curate friends by common passions, find occasional travel partners or even seek out a new generation of chatbots geared towards social interaction. Love, too, is moving towards common interests and positive feelings. As traditional marriage is unraveling, the "secure provider" is out, and the "soulmate" is in, with relationships becoming more flexible and diverse.

The family, Chinese society's backbone for millennia, is undergoing seismic shifts with the implementation of the two-child policy and more women choosing not to have children. Nuclear families might soon no longer be the main unit of consumption. Meanwhile, women will be aided in the home both by robots and app-based services as well as by men who will take on more domestic responsibilities.

Externally, individualism is informing attitudes to beauty, moving beyond the idealised standards of today. By 2030, when appearances are easily modified thanks to technology, beauty is defined by the ability to present an outer image reflecting one's inner knowledge and interests. Physical fitness and vitality are also seen as beauty criteria.

1 SELF-IDENTITY

2019



WOMEN JUGGLE ROLES

Like traditional Chinese "Bian-lian" (face changing) performers, Chinese women in 2019 switch identities according to the different roles they play in society. Confucian values of duty and filial piety hold sway in the familial sphere where they act as loving mother, caring wife, docile daughter and daughter in law. At work or in social circles however, progressive forces are at play. China's socialist-egalitarian past combined with economic opening and opportunity, have resulted in women that are remarkably unbridled at the work place. According to Ali data, women make up almost half of all business owners on their platforms, at 46%¹, and half of the world's self-made women billionaires are from China². Chinese women also exert their own individuality in beauty, style and hobbies, and they have taken to travel with gusto. 56% of Chinese who travelled overseas in 2016 were women even though women make up only 48% of the population³.



WHAT'S DRIVING CHANGE?

♥ INDIVIDUALISM ON THE RISE

Post 90's women experience role-juggling as increasingly conflictual. Having grown up as only children in a prosperous and open China, their aspirations are individualistic. 64% of high income young Chinese women aged 13 to 28 in 2018 feel that "being true to who you are" would better increase their chances of succeeding in today's world instead of "being the person others think you should be"⁴.

♥ YEARNING FOR SELF EXPRESSION

This yearning for self expression was foreshadowed by role models e.g Jiang Yilei (aka Papi Jiang) an outspoken comedian whose video blogs, which boast 44 million followers, poke fun at the excesses of Chinese society, or Ma Jiajia, who launched the "Powerful" sex-shop brand at age 22 and became an admired entrepreneur, often featured in the media.

♥ ANDROGYNY IS "IN"

FanxyRed is part of a trend for "boys bands" made up of androgynous women. They boast close to 1 million followers each on Weibo. and when introducing themselves they use the gender-free meishaonian, or "beautiful youths"⁵. This trending androgyny is coupled with an evolution of the family unit, where some young men are taking on stay-at home roles.

♥ CHINA FIRST

While resisting parts of the "National Confucian ideology" pushed by the ruling party, namely group values and societal roles, young generations are still nationalistic. Part of their self-confidence is rooted in their pride of a China that is dominant and influential on the world scene. Although they are more exposed to the world and better travelled than any previous generation, young consumers are more likely to opt for home-made brands. The Forbidden City, with its 600-year history, recently launched a series of lipstick that bears patterns such as royal embroideries, antique furniture and cranes inspired by the national treasures on display in the museum. More than 100,000 sticks sold out within four days of their launch in 2018⁶.

“
The post-90s in general, emphasize less on marriage and more on personal values and opportunities.
”

Dr. Jiang Li
Associate Professor of Social Media and Health Communications
City University of Hong Kong

2030



FOLLOWING THEIR OWN MIND

♥ DEFINED BY ACHIEVEMENT, PASSION AND PURPOSE

Going forward, outspoken women business leaders like Ling Zihan, the 29-year-old founder of China's first women's tech start-up platform will be the norm rather than the exception. Not to be confused with the feminist agenda of the West, China's young women are more hedonistic than ideological but they nevertheless challenge norms: increasingly delaying marriage and children (the average age of marriage is constantly rising), they are consciously following the beat of their own drummer.

♥ DISMISSING GENDER LABELS

Pejorative terms of yesteryear such as "leftover" for unmarried women are worn as a badge of honor and are spread via social media to empower independent and capable women. Women are starting to dismiss gender labels altogether, making "female" less central to their identity. By 2030, passion and individual capability are set to form destinies more than norms and hierarchy.

♥ PROUD OF CHINA

Digging into their culture and heritage is becoming a popular way for China's women to explore their identities. They are becoming experts in different periods, forging emotional connections to their aesthetics. By 2030, the "Created in China" movement will have catapulted Chinese brands across fashion, lifestyle and consumer goods to local and international success.



BRAND IMPLICATIONS

To key into consumer trends, brands will need to rethink their design and marketing practices. As women no longer equate gender and fashion, gender-less product design will be key for traditionally gendered categories like fashion, cosmetics, and personal care. When marketing, hyper personalisation could answer the expectations of a highly individualistic Chinese female consumer. Harvested personal data could serve to create ads hyper-customised to each individual's personality. Finally, brands need to connect with Chinese consumers by incorporating Chinese cultural elements in a modern way.



WHAT IF?

Fashion brands no longer have "menswear" and "womenswear" and instead, section stores into personality styles like "social butterfly", "provocateur", and "Zen"? Customer experience would follow, e.g the "Zen" section, having calming sounds of running water play in the background and minimal presence of store attendants to reduce fuss and interaction.

2

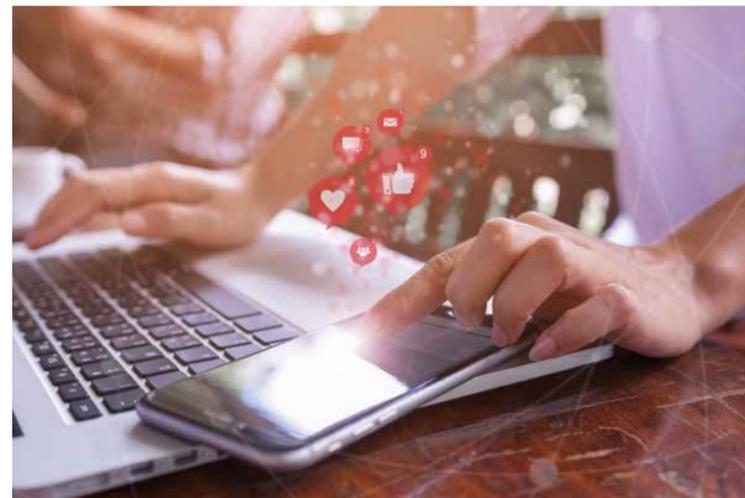
FRIENDS

2019



TREATING FRIENDS AS FAMILY

This generation of women grew up in the era of the one-child policy, they seek connections to others who could understand their daily challenges and state of mind. They are bonded to their female friends by unique common experiences in a world apart from their parents' generation, elevating their friendships to one that is akin to sisterhood. Digital and social media pave new ways for friends to engage in social activities together such as virtual shopping and gaming online. Social media platforms also permit friend circles to expand quickly beyond school-mates and colleagues giving rise to "faceless" friendships that encourage open sharing sheltered by anonymity.



WHAT'S DRIVING CHANGE?

♥ FRIENDSHIPS ARE INCREASINGLY CURATED

The advancement of big data and artificial intelligence helps women to "curate" friends based on similar communication style, common personality type and fit with one's moods and needs.

♥ MY ROBOT, MY FRIEND

Last year saw Tabikaeru, a Japanese app featuring an animated traveling frog quickly rise to the top of the Chinese app store. Users care for Tabikaeru by feeding him, and the frog, in return, shares information and pictures from his travels^{*1}. Many see the little frog as a sort of child, friend, or stand-in sibling.

2030



PURPOSE-SUITED FRIENDSHIPS

♥ CURATED PURPOSEFUL FRIENDSHIPS

In 2030, with the advancement of big data, artificial intelligence and algorithms, women can leverage technology to curate better friends. Women will expect more personalised friends e.g. similar communication style, more attuned to your moods and needs and common personality type.

♥ ON-DEMAND FRIENDSHIPS

As digital interactions become the mainstay, short-term, on-demand friendships emerge. These are occasion-based friendships that are fit for purpose e.g. friends for vacations, friends for maternity advice, or friends for break-up recovery. In 2030, women can be connected with each other based on real-time need and availability.

♥ AI FRIENDS

Robots play an increasing role to provide companionship for women. They go beyond alleviating the burden of physical tasks to providing advice on emotional matters and simply companionship. Machine conversation partners become quite common as social chatbots develop. The current generation, e.g. Microsoft's Chinese language bot, Xiaolce 5, can already process two people speaking simultaneously, interacting with users like in a real conversation.



Friendships will tend to be more transient, focused on in-the-moment needs vs. seeing peers as long-term companions.



Dr Yang Keming
Associate Professor
Durham University



BRAND IMPLICATIONS

To capitalize on women's emotional need to bond and socialize with other women, brands can communicate on female friendship (e.g. Adidas "all in for my girls"), encourage women to celebrate the contributions their best friends had made to their lives (e.g Bailey's China) and create or sponsor activities bringing women together such as running clubs or content events.



WHAT IF?

Brands with retail spaces creatively configured their branded environment to foster new friendships; e.g. create comfortable settings in-store where women can spend time together and bond such as a tea corner or a sociable context to try on fashions and makeup. Offering friendship discounts or loyalty incentives for friends who regularly shop together could also be a way of surfing on a rising trend.



3

LOVE

2019



FROM STATUS TO SHARED PASSIONS

Today, the meaning of love is tightly related to gaining status and security. Chinese Women tend to marry to men with good material foundations, and social conventions put family-building at the top of a young adult's priorities. But with the growing independence of women and the increase in their financial capabilities, there is an unraveling of love from marriage and more women are delaying marriage and children, defying social conventions. Marriage rates are projected to decrease from 9.9 (per '000) in 2015 to 8.0 in 2030. There is a continuous tension between keeping to traditional values and progressing with global influences, although marriage and having children remains the end-goal for many women.



WHAT'S DRIVING CHANGE?

♥ RISING INDEPENDENCE

An over-index of women enrolled in universities^{*1} and a decreasing gender wage gap^{*2} empowers women to remain financially independent.

In their private lives, women also show more independence. They engage in casual dating and sex and choose mates on their own terms: with their basic needs and often more provided for, women are starting to have heightened expectations of love. Beyond security, women look to build and share more common interests and passions with their significant other.

♥ UNCONVENTIONAL RELATIONSHIPS

A current trend sees women looking for younger men, referred to as "Warm men" (Nuan Nan in Chinese) because they are seen as simple, caring, and most importantly, loyal. This trend clearly points to the empowerment of women, as they put the traditional rapport between the genders on its head.

♥ INCREASED SEXUAL LIBERALIZATION

Ma Jiajia, who founded the "powerful sex shop" at age 22 after graduating from university, is a much admired business role model, often featured on the media. In an interview, she voiced her hope of sex moving away from being "shameful", encouraging women to become "consumers" of sex and to "enjoy" men^{*3}. Hema recently extended its service to deliver sex toys within 30 minutes. Also, more Chinese women are watching porn, increasing to 50.7% in 2015 from 36.5% in 2000^{*3}.



2030



TRUE LOVE OR NOTHING

♥ SEEKING A SOULMATE

In the future, the meaning of love is centered on seeking comfort and feeling positive. While more people are single, they have not necessarily given up on love. In fact, they seek to discover their soulmates for life. But the traditional expectations to get married and have children is diminished, and relationships are more flexible and diverse.

♥ MARRIAGE NOT A MUST

Marrying equal or down will become more accepted in society although the ideal partner remains one who is richer, and in addition generous with their time and attention. More women will choose to be single until they find their true love.

♥ SEXUAL EMANCIPATION

Sex in particular becomes less taboo and we can expect perceptions to shift from sex as a means for procreation to sex as a pleasurable activity shared with one's lovers or even enjoyed alone. Women are gaining a better understanding of their sexual needs and abilities, and are more open to share more about it and also experiment with sex toys to improve their sex lives.

♥ TECH-OPTIMIZED SEX

By 2030, technology will play an increasing role in women's love lives. Love solutions driven by technology stretch from expanding one's social network (the number of online daters is projected to rise by 40% to 130 million from 91 million today⁴) to tracking mood to reducing uncertainty in personality fit via big data. Sexual enjoyment is enhanced with smart sex toys and virtual reality sex. Forging meaningful relationships with humanoids and artificial intelligence is especially acceptable for the younger generation of women, who were born into and grew up in the digital age.

91% of high income young women aged 13-18 in 2018 say they are "excited about the impact AI will have on society"⁵.



BRAND IMPLICATIONS

In their communication, brands should move away from stereotypical love models e.g. older, richer men with young, pretty women to more diverse models, and ignite honest conversations about topics like love, sex and relationships. Jewelry brand Chow Tai Fook, asked women on social media how they would best represent their 2017 selves in one Chinese character. Frequently mentioned characters included "fun", "love", and "change". Love eventually won the popular survey, prompting discussions about the different types of love women embrace.⁶ Brands should also recognize independent women and address them with offers for financial products, real estate or self-gifting luxury. Finally, as women still face pressure to settle down, brands who showcase fun and lighter relationships will be more relatable to women e.g. campaigns and promotions for surprises and treats that can spice up relationships.



WHAT IF?

Jewelry brands celebrate unconventional love through an engagement ring campaign featuring various types of couples, including bread-winning women with stay at home men, interracial love, late-life love, etc. To bring this idea further, brands could even design a series of rings that represent each type of unconventional love.

4 FAMILY

2019



SHARED RESPONSIBILITIES

Family and the importance people accord to it has been a mainstay in Chinese society for millennia. With the advent of the mainstream 4-2-1 family structure, the role of women in the family is galvanized; they are under pressure to care for their children and aging parents as well as to contribute financially. Despite the abolishment of the one-child policy, there has not been a significant rise in childbirth rates. Rising living cost and the increasing aspirations for quality of life mean that women choose not to have multiple children.

In childless and one-child households, pets are emerging as alternate family members, perceived to bring joy but with lower maintenance. Although women are still perceived as primary caregivers, grandparents and fathers are increasingly involved in their children's upbringing as seen in a number of popular TV shows like "Baba qu nar" (Where are we going, daddy?) show-casing male celebrities and their children.



WHAT'S DRIVING CHANGE?



♥ DIVERSIFYING FAMILY STRUCTURES

Single households are increasing (from 8.3% in 2000 to 13% in 2015^{*1}) and single parents with children have increased from 2.9% in 2000 to 4.9% in 2015^{*1}. The abolishment of the one-child policy means the 4-2-1 family structure is diverging and includes 4-2-0 and 4-2-2 as common household structures.

♥ EMERGENCE OF TECH-BASED CAREGIVERS

iPal is a new robot babysitter that helps parents partially manage tasks e.g. entertain, teach and provide companionship for young children, as well as to keep an eye on their children via a camera equipped app^{*2}.

♥ EDUCATION REFORMS

The Ministry of Education 5-year education reform places stronger emphasis on morals and abilities over tests and grades^{*3}.

2030



LESS BURDEN MORE ENJOYMENT

♥ NUCLEAR FAMILIES ARE NO LONGER THE STANDARD

Family structures are continuing to diverge to the point where nuclear families are no longer the main unit of consumption. With increasing rates of divorce and declining rates of marriages 2-1-1 and 2-1-0 family structures are becoming more common. The trend for single parents with children is further accelerating as childbearing technology such as test-tube babies and artificial wombs advances and the government legitimizes eggs freezing and surrogacy.

♥ EASED BURDEN AT HOME

Robots and app-based monitoring services help alleviate pain-points in caring for a family, making it easier to care for both the young and the elderly. This will give women more time and headspace to assert their values and personality in upbringing their children and supporting their family.

♥ PARENTING EVOLVES

With smaller family units, stronger ties are fostered between family members. Mother-children relationships are leveling with mothers being more of a friend than authoritative figure. As a generation who values individualism and authenticity, parents engage their children in more varied activities and experiences.

“Automation and artificial birth technologies will become highly developed in 10 years. Women will no longer have to be married to have a child.”

Hu Bin
Co-founder
FuturistCircle



BRAND IMPLICATIONS

As family structures evolve, communications and campaigns should reflect the changing realities - feature alternative family structures as well as pets and eventually robots as new family members, show role reversals e.g. women as breadwinners, men engaging in household chores, and younger generations teaching older generations. Mars China for example created a CNY commercial for Dove chocolates showcasing the changing relationship between a (seemingly single) mother and her growing daughter that culminates in a touching reunion where Dove helps to express their love. The campaign was inspired by insights which revealed a growing emotional disconnect within families as people struggle to show affection and emotion, especially to their parents.*4



WHAT IF?

Fashion brands created "Kin-friendship" events that takes place every last Friday of the month to encourage mothers and their children to shop and bond together. Promotional events can include exclusive discount for twinning outfits and outfit advice by partner fashion designers.

5

BEAUTY

2019

STANDARDS
RULE

Today, there exists one dominant standard of Chinese beauty. China's "ideal" woman is the "Bai Fu Mei", a coined term that combines the words "fair", "rich" and "pretty", or "Wang Hong Lian", Internet celebrity face which refers to the heavily filtered selfies posted by China's online KOLs (Key Opinion Leaders). Exacting standards dictate anything from the shape of faces, noses and eyes, to what texture and shade skin should have. Achieving this ideal is becoming more difficult as standards rise, hence the surge of beauty enhancement solutions, from the virtual to cosmetic surgery. Meitu Xiu Xiu, a leading digital make-over app in China market, has over 500 million users^{*1}. China is also third worldwide for the per capita number of cosmetic procedures performed.

Beauty is instrumentalised; in a competitive, dynamic society, and increasingly, women want to look good on social media, where success is also often monetized for professional live streamers and KOLs. The pressure to conform to these ideals is also causing a rise in anorexia and depression in young women.

In 2017, **14 million** Chinese people were expected to receive some form of cosmetic surgery, up **42%** year-on-year^{*2}.

WHAT'S
DRIVING CHANGE?

♥ DEFINITIONS EXPAND

Considered too heavy and dark by China's exacting beauty standards, rising pop idol Wang Ju is pushing beauty boundaries with assertions like "the standard of being beautiful is to be yourself" and "I control my own life, having an independent spirit is too important". She has developed a cult following of fans who find her relatable.

♥ BRANDS INCREASINGLY ADVOCATE NATURAL LOOKS

The Bare Skin Project, launched by SK-II in 2018, is a social media campaign encouraging women to share their bare faces on social platform Weibo. It aims to help women love and be unafraid to share their natural looks.

♥ FITNESS IS GROWING IN IMPORTANCE

56% of young high-income Chinese women (13 to 28) are very likely to "buy products or services that will help them maintain good physical health" vs. 43% globally^{*3}. Nike's recent campaign features actress Wang Luodan relating to the challenges of daily exercise. It delivered an aspirational message, encouraging Chinese women to focus more on health and fitness, and to embrace their imperfections.

♥ HYPER PERSONALISED LOOKS

A current online trend for extreme makeovers sees bloggers using makeup but also prosthetics, modeling tape to alter face shapes, contact lenses and fake eyelashes to achieve transformative looks. Chinese beauty blogger He Yuhong wowed the internet recently with her immaculate make-up skills. Her viral video showed her using make-up to transform herself into a real-life Mona Lisa. Her Miaopai video has been viewed 20 million times, and she has gone on to recreate looks from other famous icons like Taylor Swift and Selena Gomez^{*4}.

17Beauty's makeup booths in Beijing and Shanghai allow shoppers to receive personalized service and makeup recommendations through facial recognition software. The booths are stocked with beauty products that are refreshed every two to three weeks according to user preferences^{*5}.

2030



BEAUTY IS TAILORED AND DIVERSE

♥ BEAUTY BECOMES INDIVIDUALISTIC NOT IDEAL

Make-up is also increasingly targeted and individualised. As technology and beauty products become more and more advanced, consumers increasingly think less about what to buy, and instead focus on how to use. Skills-led beauty becomes the rage, and brands focus on educating their consumers on how to utilise the myriad of high-tech solutions to achieve their desired look. Facial recognition software aids in delivering personalised service and makeup recommendations and virtual try-ons will also become state of the art.

♥ BEAUTY IS DOWN TO ONE'S CREATIVITY

Personal appearance is hyper-tailored and age is just a number as the median age in China passes the 40 year-old mark by 2030. Anyone can look the way they want thanks to technology, the only limitation being one's imagination. By 2030, individual definitions and creative ability become the standard for beauty. Cosmetic products enable women to easily modify their appearances, building on technologies such as "second skin" – an innovation by beauty brand Shiseido that allows one to hide their puffy eye-bags under a flexible and invisible "second skin" gel-like substance⁶.

The digital revolution began with the transformation and transposition of as many "real-life" activities and functions as possible into a digital entity. Today, the reverse tendency is becoming ever more apparent; the virtual is beginning to reveal itself within the actual.

Avatars enhance individualism in a digital world - they allow women to conform to societal expectations online while being free to explore different beauty definitions. But digital beauty is also increasingly extended to the real world. This definition of beauty is less about inherent qualities than about creative skills – thus, beauty can be learnt. Personal confidence will be based on the mastery of techniques and technologies that enable women to showcase their self-defined versions of beauty.

♥ CHINESE INSPIRATION

With the rise of China on the global stage⁷, beauty also increasingly takes inspiration from Chinese history, knowledge and humour, creating a vibrant and influential hyper-local trend for Chinese beauty that diminishes the powerful Korean and Japanese influences of old.

♥ HEALTH IS BEAUTIFUL

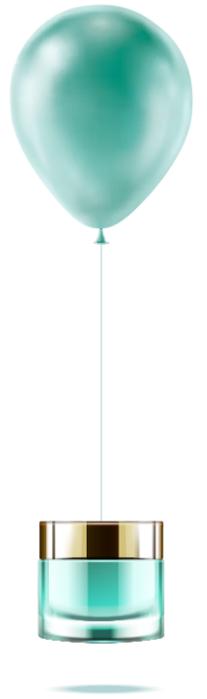
The concept of beauty is not only "in the eye of the beholder". More individual and diverse, beauty also becomes more holistic. It is a total result of a face that is tailored to express one's individuality, health, fitness as well as balance of mind.



BRAND IMPLICATIONS

As beauty is no longer being represented by a single, uniform standard and increasingly celebrates the individual, brands should tailor their products and communication towards helping individuals bring forth their own uniqueness. With China greying and the median age rising, women will become more comfortable with embracing their age. Beauty products should be geared towards aging skin, but with a view of optimising and enhancing, not hiding or aggressively combatting age.

As skills-led beauty becomes the rage, brands will need to educate their consumers on how to utilise the myriad of high-tech solutions to achieve their desired look. Platforms such as make-up academies could be one way to reach out and educate consumers. E-commerce is an increasingly important sales channel with the booming popularity of beauty bloggers showcasing their make-up skills online, coupled with shoppable links that allow for direct purchase. A robust online presence becomes essential, and the rise of AR/VR technology that allows for consumers to virtually see what the product looks like on them without visiting a physical store is accelerating this trend.



WHAT IF?

Beauty brands develop an app that allows users to access a "magic mirror" on their personal devices. Through a paid monthly subscription service, make-up products can be applied virtually. The app also makes use of the front-facing phone camera and facial recognition technologies to determine which product best suits your face shape and skin tone. Users can easily recreate offline the virtual looks that they like through purchase buttons within the app that instantly purchases and delivers the relevant products to the user's home address. Alternatively, users can quickly recreate offline the virtual looks that they like, with the chosen design 3D-printed onto a second skin that can instantly applied to the face.



WORK

In 2030, with their independence on the rise, Chinese women are challenging the current barriers in the workplace and pursuing more purpose in their careers. While Chinese women seek equal opportunities to their male counterparts today, over the next few years, women's leadership in business will be considered normal. Currently, **China already boasts the highest number of self-made female billionaires^{*1}** and 55% of new internet companies in 2017 were founded by women^{*2}. Beyond financial independence, women will ultimately seek work to provide them with fulfillment and sustained happiness. This will also include giving back to society via careers in companies that are purpose-led such as non-profit organizations. The rebalancing towards happiness is already seen in trends such as the "Buddha-like mindset", whereby some youngsters are refusing the rat race with a laid-back, peaceful and unambitious attitude^{*3}.

Career paths will continue to diversify and more women will seek to monetise their individual talents and interest, resulting in new careers like micro-influencers. Blogger Incubators like YuJiaYuLe select, train and manage contracted bloggers. By 2030, digital disruption and automation will favor new skill sets that are irreplaceable by automation e.g. empathy or creativity, where women hold an advantage.

By 2030, the peak of women's career will be less pegged to age and more aligned with one's ambitions and interests. The mandated retirement age would have risen close to 60 by 2030, giving women more time to explore their interests and peaks in their careers.

1 WORK SUCCESS

2019



ATTAINING FINANCIAL INDEPENDENCE

Today, the hallmark of success for women at work is advancing in one's career and achieving financial independence. Modern Chinese women seek equal, if not better opportunities than their male counterparts, equalising the standing wage gap. The role of work is an opportunity to upgrade one's skills and life while being able to support the family and her own personal spending. With the rising cost of living in China's cities, single-income households for married couples continue to decline. Meanwhile, fewer women are willing to have a second child despite the abolishment of the one-child policy for the two-child policy.



WHAT'S DRIVING CHANGE?

♥ REFORMS IN EDUCATION

China's Happy Education policies, introduced in 2013 aims to reduce the workload of students and make schooling more enjoyable. Parents are encouraged to free their children from the pressure they themselves endured^{*4}. Young women are encouraged to pursue a career driven by passion and interests.

♥ WOMEN LEADERSHIP DEVELOPS

Lean In China has a flagship Young Leaders Program that brings together 100 female university students who are motivated by change^{*5}. It provides training and exposure to industry experts and tackles societal issues through innovation projects owned by the participants. Didi Chuxing has a women's leadership program that is focused on grooming female employees to climb the career ladder into executive positions.

♥ REBALANCING TOWARDS HAPPINESS

A recent trend which has been described in Chinese media as a "Buddha-like mindset", sees some post 90's refusing the rat race with a laid-back, peaceful and unambitious attitude^{*3}.





TOWARDS FULLFILLMENT AND MEANING

“

A lot of women are looking for a calling, or some kind of meaning when they are looking for a job. [They] take career seriously because they view it as a form of self-expression and think that career is a key driver of satisfaction.

”

Julie Wang

Co-Founder, Head of Ecosystem
Car Block Foundation

♥ POWER AND LEADERSHIP

By 2030, women’s leadership is normalised in the business arena. A rising number of female role models at work provide inspiration and support for younger women. Beyond financial independence, women aim for and achieve more power and recognition in the workplace. The rise of smart home technology and men increasingly taking on domestic responsibility also supports women to freely pursue their career ambitions, without feeling guilt towards the family.

♥ WORK FOR PURPOSE

Happiness is derived from giving back to society. Young women who are looking to positively impact the world seek careers that are purposeful e.g. non-profit and/or purpose-led organisations.

♥ WORK FOR JOY

For younger generations, personal happiness is key and a successful career is about seeking fulfillment and joy from work. The role of work elevates to one of greater purpose and sustainable happiness, rather than a means of survival and material enjoyment. Ideal careers shift from dream jobs defined in the past by society e.g. stable careers like teachers and doctors to dream jobs defined by peers like social entrepreneurs, or fashion designers.

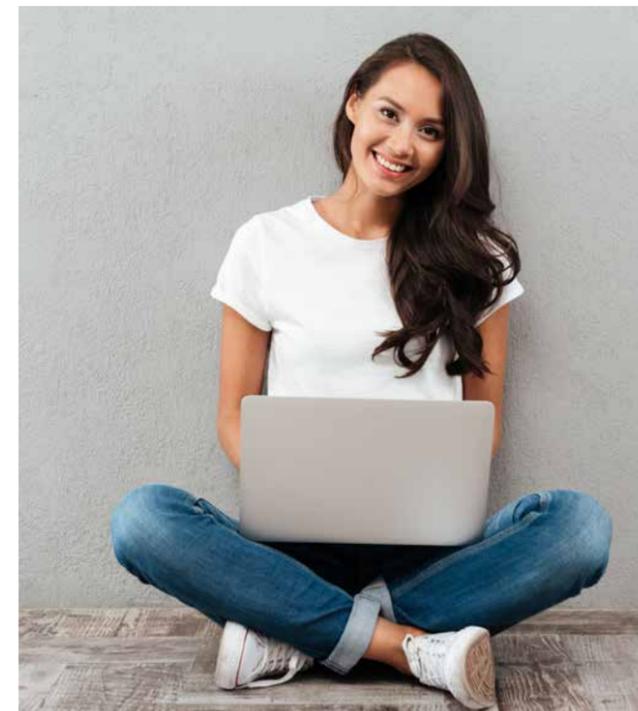


BRAND IMPLICATIONS

Career progression matters to young Chinese women. Brands as employers will win if they show empathy towards women and take proactive steps and policies to help them face the current barriers they encounter in their career progression.

Putting professional women in the spotlight by hosting meet and greet events for loyal female consumers could permit brands to connect with consumers on a more personal and meaningful level e.g. through sharing career advice, how to dress for success, or tips on managing work-life balance.

Finally, as the younger generation of women take a more relaxed approach towards work and what drives them, brands can tap into this sentiment by repositioning their products and communication around the little joys and the bigger purpose in life. Also, CSR and sustainability will be important brand propositions that will become the new criteria by which women choose brands.



WHAT IF?

Companies sponsor female employees with 10% of their work time for them to explore how to improve the world for women. By building the future from a women’s perspective, this will enable women to leverage their strengths and have dedicated solutions that can help them thrive better in their workplace and world they live in.

2

CAREER PATHS

2019



PURSUING EQUALITY

Today, women strive for high-paying jobs, increasingly challenging and conquering work territories previously dominated by males. Highly educated, they are also pursuing jobs they find interesting and taking on more risk in their career. At present, China boasts the highest number of self-made female billionaires^{*1} and 55% of new internet companies in 2017 were founded by women^{*2}. With the majority of women likely to settle down and have children, women's career paths stagnant in their late twenties and early thirties (as their attention gets diverted to having children), and peak in their early-mid 40s.



“
Entrepreneurship allows women the freedom to pursue what she wants to be.
 ”
Julie Wang
 Co-Founder, Head of Ecosystem
 Car Block Foundation



WHAT'S DRIVING CHANGE?

♥ FLEXIBLE AND NON-LINEAR

As China pivots from a manufacturing to service economy, work is becoming less structured. 70% of freelancers in China today are under age 30^{*3}.

♥ WORK LESS BOUNDED BY CONVENTIONAL PLACE AND TIME

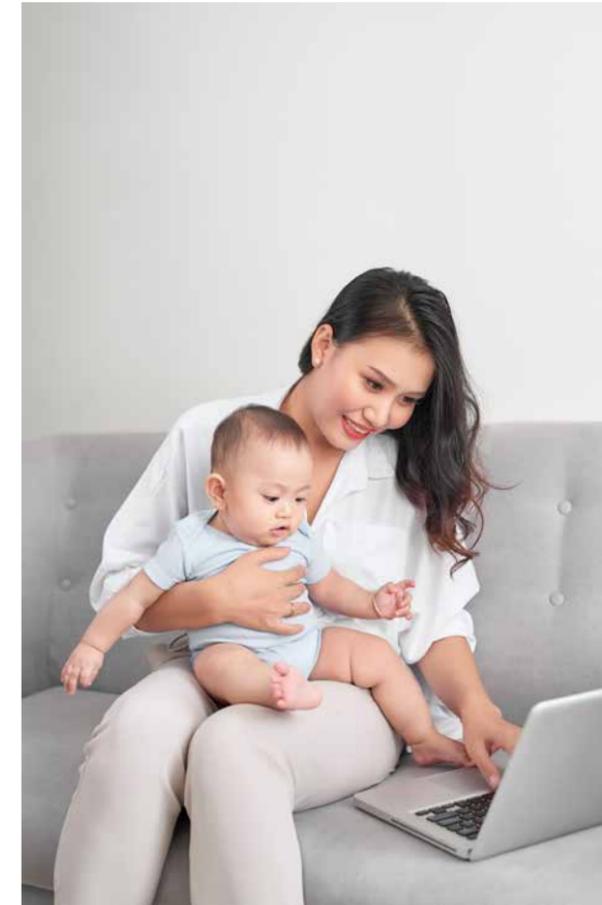
65% of Chinese workers work remotely for half or more than the week in 2017 (vs. 52.6% in the US.)^{*4}

♥ COMPANIES ARE ACCOMMODATING FAMILY RESPONSIBILITIES

JD.com recently introduced free childcare services for their staff, and Didi Chuxing hired kindergarten teachers to look after its employees' children at work.

♥ NEW ATYPICAL CAREERS ENABLED BY TECHNOLOGY

Incubators like YuJiaYuLe Holding are new businesses that have grown around the internet celebrity economy. They select, train and manage contracted bloggers as well as handle their social media content, product and online store.





PROGRESSING AHEAD OF MEN

♥ THE ERA OF AI FAVORS WOMEN

Driven by digital disruption and wide scale automation, repetitive and low value jobs will most likely cease to exist by 2030⁵. The new skill sets rising in importance are those that women hold an advantage in: centered around empathy and compassion or technical hands-on skills such as hairdressing and cooking or intuitive-led skills like the arts and innovation. Without the inertia tied to holding traditional jobs and greater familiarity with flexible career paths, women are well-poised to leapfrog men and dominate these jobs of the future.

♥ DIVERSITY IN CAREER PATHS

With the rise of independent and confident women who seek authenticity and challenge the status quo, career options for women continue to expand and diversify, also becoming less linear e.g. taking gap years, holding multiple jobs at once, frequent job-switching and freelancing.

♥ MULTIPLE CAREER PEAKS

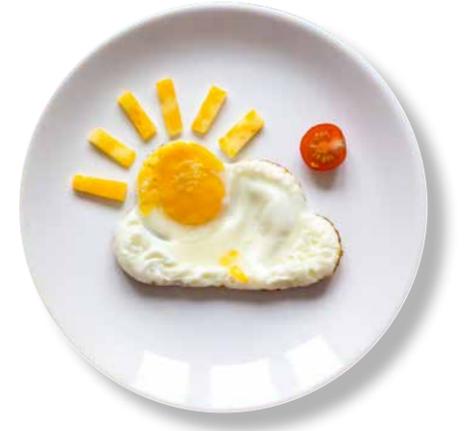
In 2030, the peak of a woman's career is less pegged to age, and more aligned with her ambitions and interests. The mandated retirement age would have risen close to 60⁶, giving women more time to explore their interests and peak (or even double/triple peak) in their careers.



Women will have equal capabilities as men in China's knowledge and IT-based economy of the future... Society is progressing towards gender equality in the informational era.



Hu Bin
Co-founder
FuturistCircle



BRAND IMPLICATIONS

Brands can inspire women by introducing and connecting them to role models that have taken alternative career paths e.g. successful entrepreneurs, women who have second or third careers, or women who are successful in male-dominated fields. This would create a halo effect for the brand that leverages on the strength, grit and bravery of these new age successful career women.

The changing nature of work gives brands the opportunity to create new products and services for the future career women e.g. "super-breakfast for women who work early-hours e.g. when the baby is sleeping" or creating a new "work from home" clothing range that is stylishly professional yet comfortable.



WHAT IF?

Technology companies create new departments that hire women specifically to train their employees and code their robots and AI systems with relevant skills of the future. As intuitive and emotionally-intelligent traits become more sought after in the digital-first world, what would a women-designed world look like? What functions and designs would a women-designed smart phone have? Organisations that hone into women's qualities and crack the code on transferring them to robots and machines will win.



PLAY

A new sense of purpose will guide how women spend their time and money. Status will move away from superficial signifiers like wealth and social-media popularity to sophisticated intangibles like education, wellbeing and connoisseurship. Today, we see clubs offering wine appreciation classes and "docutainments" (documentaries + entertainment) are also gaining popularity as more women are increasingly looking for educational media to upgrade themselves. Travel is also evolving towards purposeful ends like picking up new skills e.g. Western etiquette or inter-cultural communication.

In the future, status will be defined by one's positive impact on society. Chinese women will aim to do good by fulfilling their social and environmental responsibilities. In 2030, fame is having one's purposeful actions recognised by a global network of like-minded individuals. Spending is evolving too – facilitated by the access economy and driven by big data analytics, women are more selective when choosing items they want to own. Predictive shopping services will also make consumption become hyper-personalised.

1 STATUS

2019



STATUS VIA EXTERNAL CUES

In a competitive and dynamic society where individuals are busy climbing the socio-economic ladder, Chinese women compare themselves to others and seek to showcase their progress through external cues. Going beyond ownership of high-end luxury brands, status display today also encompasses luxury experiences, which are readily shared on social media. Achievement is another status cue, exemplified by a degree from a renowned university, or a prestigious job, e.g. lawyer or doctor. Finally, online popularity increasingly defines status in real life. Being a KOL or online celebrity is a way to the top of social hierarchy. Online blogger celebrity Zhang Dayi, for example, has more than 7 million followers on Weibo and raked in more earnings than Kim Kardashian in 2016^{*1}. In an increasingly affluent society, the bar is constantly rising and since branded goods are now accessible to the middle classes, status is increasingly moving away from superficial signifiers to intangible assets like experiences and memberships in exclusive social groups. Cultural and craftsmanship appreciation is also increasingly associated with status, whereby niche know-how of materials, provenance, designers, culture and history are prized.



WHAT'S DRIVING CHANGE?

♥ EXPERIENCE AND CONNOISSEURSHIP ON THE UP

Tmall's Luxury Pavilion Club is an online "gated" community where entry is by invite-only. Membership allows access to exclusive event invites, sales and launches of new products by luxury brands^{*2}. Wine educator WSE opened an office in Hong Kong in 2017 to cater to growing interest in the region. The number of Chinese candidates grew by 18% in the year after the opening^{*3}.

♥ HEALTH AS A STATUS SIGNIFIER

29% China vs 14% globally

Young high income Chinese women aged 13-18 in 2018 picked "being physically healthier" as their top choice when asked "what they'd need to change to make them happier"^{*4}.

♥ ENVIRONMENTAL CONSCIOUSNESS RISES

In 2018, growing awareness manifested in extensive discussions on the negative environmental impact of e-commerce packaging waste among Chinese netizens.

♥ GOOD ACTIONS BECOME IMPORTANT

China recently released the 2017-2018 China Film and Television Star Social Responsibility Report, which ranks celebrities by their work, charitable activities and behaviour. When famous actress Fan Bingbing received a score of zero and was ranked last, she was criticized and discredited on social media^{*5}.

2030



STATUS LINKED TO PURPOSE

♥ INNER AND OUTER STRENGTH

Purpose is gaining the upper hand over possessions and means different things to different individuals. To be purposeful, Chinese women defy convention and showcase their individualism at work and in daily life. Therefore, having the inner strength to be purposeful, becomes the new definition of status for Chinese women in 2030.

Being healthy and fit is another sign of strength and also becomes a cue of status, driven by a rising search for better living. Conscious of their health, young Chinese women check, improve and maintain their health around-the-clock.

♥ CHARITY AND SOCIAL ACTION

As women grow more purposeful in their career choices, they align their behaviour in their choice of leisure activity and purchases. The sharing economy makes it easy and common to co-own resources, taking some gloss away from ownership. In 2030, women's attention is turned outward, towards social action and improving the world around them. This shift is supported by various government policies e.g. the Charity Law⁶ and social credit system that push citizens to behave with purpose and for the greater social good. Lead by a "first generation" of billionaire and celebrity philanthropists⁷, by 2030, philanthropy becomes the new definition of status for the middle-upper class who are following their lead. Women achieve fame in 2030 when their purposeful actions are recognized by a global network of like-minded individuals.

♥ ENVIRONMENTAL ACTION

Additionally, as more environmental challenges (like global climate change and local resource challenges) emerge, living in an environmentally-friendly manner is a new status symbol. Emerging technology and tools make it easier for Chinese women to access information and evaluate the environmental impact of their lifestyles.

The younger generation are the initial adopters and supporters of this new definition of status, as it is consistent with their internal values. They are more purpose-driven – liking brands that stand for something, taking actions to be more environmentally-friendly, and buying from companies that have committed environmental policies.

81% 13-18 years
 VS 25% 19-28 years

Agree that "I like brands that have a point of view and stand for something"⁴.



BRAND IMPLICATIONS

As consumers gain knowledge, they will be more interested in and appreciative of the quality of the products and the expertise behind the craftsmanship. Educating and sharing stories of unique history and craftsmanship will make consumers feel more connected to the brand. Incorporating purpose will slowly become a "must" in branding and innovation. That means going beyond selling environmentally-friendly products to making the brand's objectives and business practices purposeful. As status becomes centered around fulfilling social and environmental responsibilities, being a status brand in 2030 means enabling your customers to fulfill these responsibilities. Young women, especially the youngest group, will appreciate and buy into purpose-led brands that are genuine, transparent and aligned with their beliefs. To lead the trend, brands might engage brand ambassadors who are not just popular and influential, but who exemplify inner strength and stand for social causes.



WHAT IF?

Fashion brands incorporate new blockchain technologies into their products. Each product can be securely tracked at every day of the product process, maximizing transparency, and allowing consumers to understand the story behind each item. The material origins, manufacturing procedures, transportation processes, etc., can all be tracked. Women can also use the information to measure the environmental impact of their purchase.



2

LEISURE TIME

2019



ESCAPISM

Busier lives and rising stress levels spell a need for women to relieve pressure in their leisure time. Women seek escapism, entertainment and distraction through games, television and online platforms. They also spend time socializing (online and offline) with friends. One sign of rather mindless escapism is the popularity of live streamers who often stream completely inane scenes of daily life. Zhang Yumi (4.7 million followers on Weibo) is part of a wave of "big stomachs" who devour large quantities of food on camera. She monetized her fame via a studio producing food-related videos and enjoys a stream of endorsement offers from businesses^{*1}. Fitness is also on the rise; 63% of 13-18 year olds play sports at least once a week and 38% engage in holistic traditional health practices like Tai Chi, yoga and acupuncture^{*2}. A final nod to the theme of embracing escapism, Chinese women overtook men and now lead independent travel at 58%^{*3}.



WHAT'S DRIVING CHANGE?

♥ SELF IMPROVEMENT

43% of women age 13-18 visit museums, galleries and other cultural venues at least once a month^{*2}. "Docutainments" and educational podcasts are on the rise and travel is increasingly dedicated to picking up new skills e.g. to learn inter-cultural communication, or to go on a yoga master-class. Tapping into women's quest for knowledge, Gucci launched Gucci Places, an innovative new travel app that lets users explore various locations around the world, while showcasing the destinations-inspired collections throughout the years^{*4}.

♥ COMBINING INTERESTS WITH DOING GOOD

FitHearts, a children-focused charity in Shanghai, hosted a boxing event in Hilton Shanghai where 75% of the proceeds goes to the Rende Foundation which brings gifts to children in rural China^{*5}. The event allowed individuals to combine the sports interests with doing good.

2030



SEEKING MEANING – INWARD AND OUTWARD

♥ ME TIME

In a fast moving world, the youngest generation of women are increasingly blocking out "me-time" – carving out space in their lives to mentally-reset and discover themselves. This might include temporarily disconnecting from digital technology. As a result, there is a rise of leisure activities that involve nature and facilitate introspection for greater self-knowledge.

♥ COMBINING INDIVIDUAL PASSIONS AND SOCIAL CAUSES

More will spend time acting for the greater good, engaging with social issues like inequality, poverty and environmental challenges. By 2030, leisure activities that combine individual passions and social causes are becoming increasingly common, driven by the rising pursuit of purpose on one hand and the increase in available time on the other. Women interested in exercise and fitness might participate in local charity marathons that support causes they care about. Women who like handicrafts might spend leisure time conducting free classes to re-skill unemployed individuals.

♥ VOLUNTEER TOURISM

Travel will fulfill similar benevolent ambitions. Chinese women in 2030 will increasingly participate in volunteer tourism where they travel to underserved communities outside of China or in rural parts of China to help out vulnerable communities. The flexible nature of work in 2030 enables women to travel for longer, stay with the local community for a substantial amount of time, and make a lasting impact.



BRAND IMPLICATIONS

As women are stressed and look for relaxation in their leisure time, retailers could reduce the stress element in shopping by introducing "slow shopping"- a concept that has already caught on in Europe. Create side attractions in-store such as a selfie wall, in-store café, or snack bar, that will help consumers relax and linger longer in-store, and enjoy the leisurely act of shopping. Research has also found that the slower people shop, the more they spend.

Retailers should also reconsider store operations around women's evolving schedules. As the lines between work and play increasingly blur, there will be growing demand for round-the-clock leisure. Enable after-hours or around-the-clock shopping in physical locations, perhaps by allowing consumers to pre-book store visit times.

Embedding social responsibility into the manufacturing and supply chain of products is increasingly becoming a "must". Consumers, especially the youngest group, want to support brands that care about the same causes as they do. This includes fair wages, working with vulnerable populations, and supporting charities. Bringing up these points in communications is a good way to connect with young Chinese female consumers.



WHAT IF?

Heritage brands set up a travel agency to bring selected loyal customers on trips that showcase the brand's traditions. Customers can choose from several storylines/ itineraries which explores different aspects of the brand. These trips educate the consumer on the materials, craftsmanship and culture of the brand.



3 CONSUMPTION

2019



UPGRADING

As consumers gain wealth, they spend more on higher quality products for regular consumption and on status symbols for discretionary purchases. 61% of middle-class women agreed with the statement that "the grade of products and services they use now is higher than before even though this means greater spending"¹. Facilitated by cross-boarder shopping, Chinese consumers are buying into more niche and premium brands. As consumption is shifting online, physical retail is being increasingly driven by experiences, acting more as customer touch-points for outreach and promoting brand loyalty. Brands, including luxury houses, are going beyond regular customer service to providing experiences like intimate shopping with stylists, meetings with brand designers, and so forth. For example, Louis Vuitton has taken experiential retail to the next level by providing an luxurious museum-like experience to customers. "The Art of Travel", shown in Shanghai in 2018 showcased more than 1,600 objects from its archives. Chinese artworks were combined with current Louis Vuitton products in various theme displays². Facilitated by the sharing economy which enables them to share more and own less, younger consumers become more picky when selecting items they want to own.



WHAT'S DRIVING CHANGE?

♥ SHARING ECONOMY

Y-closet is one of a growing number of luxury clothing sharing platform which leases luxury clothes and accessories to customers. It attained a total of \$80 million in financing in 2017³.

♥ 3D PRINTING

Currently in concept phase, the Bouchee Capsule Food Printer uses mealworm and seaweed capsules to print out food that is appetizing, tasty and sustainable at the same time⁴. The accompanying app, allows individuals to customise the food.

2030



HYPER TAILORED

♥ INCREASINGLY SELECTIVE

For ownership, women are increasingly picking items that showcase their connoisseurship. They will prefer products that only they and other insiders will be able to appreciate. The rise of high-speed 5G networks and immersive virtual technologies further drives greater consumption of experiences as consumers are no longer limited by physical distance or time when it comes to the consumption.

♥ PERSONALISED SHOPPING FOR HIGH INVOLVEMENT

Driven by the growth in big data analytics, consumption is becoming hyper-personalised for high-involvement consumption. A manifestation of this is the maker's culture, where consumers increasingly take on the task of producing their own products. The younger generation, in particular, is actively taking up the new producer model of consumption as they have a greater need for expressing creativity in their daily lives.

♥ PREDICTIVE SHOPPING FOR LOW INVOLVEMENT

For low-involvement categories though, predictive shopping services becomes the norm. As a result, women no longer have to shop for these products themselves as decisions get delegated to algorithms. Personalised AI-driven services will curate products and make predictive purchases on their behalf.

88% of 13-18 year olds surveyed in 2018 agreed that they "wish I had more time and energy to explore my creativity, in both my personal and professional life" ^{*1}.



BRAND IMPLICATIONS

As women increasingly subscribe to personalised purchasing services, algorithms will be making purchase decisions for consumers. Future marketers will need to target algorithms and not humans. They will also need to guarantee data security or anonymity while providing personalised products and services to address the rising data safety concerns of consumers.

Keying into maker's culture will be crucial by creating experiential products that incorporate an element of do-it-yourself. This will allow consumers to contribute towards the making of products to address their need for inclusion in the production process.



WHAT IF?

Future restaurants offer food that is customised to each customer's nutritional needs. When entering the restaurant, each customer scans her sub-dermal RFID-chip implant that carries information on her food preferences, allergies and nutritional needs. Using this data, an algorithm selects suitable dishes and a personalised menu is then presented to each customer.

In addition, the restaurant experience can also be tailored. Depending on individual preferences, the dining settings can be set to create different ambiances, thereby creating the ideal dining experience.





SUMMARY

A hit drama series in 2018, *Story of Yanxi Palace*, tells the story of *Wei Ying Luo*, a girl who rose up the ranks from lowly courtesan to empress. Her character has become a much admired role model amongst young women as she achieved success based on her strengths and capabilities, mobilising wits and tenacity instead of traditional means of attraction e.g. subservience and beauty.

With the rise of China as a nation, Chinese women are well positioned to capitalise on their capabilities. Building on structural changes in a country that is prospering and opening to the world, women are already excelling at school and making gains in the workplace. By 2030, women in China will have truly come into their own.

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CONTRIBUTORS

Julie Wang
Co-Founder, Head of Ecosystem, CarBlock Foundation

Dr Li Crystal Jiang
Associate Professor, City University of Hong Kong

Chris Chen
Former Marketing Director, EF English First

Bin Hu
Co-Founder, FuturistCircle

Dora Ke
President, Personal Mentor, IE MBA Her Century

Guang Jun Li
AI Strategic Planning and Investment Director, A leading Chinese Internet company

Dr. Hongmei Li
Associate Professor, Miami University

Dr Keming Yang
Associate Professor, Durham University

Elisa Birtwistle
Director of Human & Cultural Practice Europe, Kantar Consulting

Panos Dimitropoulos
Semiotics, Human & Cultural Practice Lead China, Asia, D&E, Kantar Consulting



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CONTACT

Elaine Chen
elaine.chen@wmglobal.com

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WAVEMAKER CHINA

Shanghai Office

23F, WPP Campus, 399 HengFeng Road, Shanghai
200070, China

Tel: 021-2405 1293

Guangzhou Office

10F, Development Center, 3 Lin Jiang Road, Pearl
River New City, Guangzhou 510623, China

Tel: 020-2881 8288

Beijing Office

12F HuaLi Building No.58 Jinbao Street, Dong
Cheng District, Beijing 100005, China

Tel: 010-8523 3781

Beijing Office

Room 809, 8F JinBao Building No.89 Jinbao Street,
Dong Cheng District, Beijing 100005, China

Tel: 010-8523 3880