



# What makes China different - and what does it mean for research?

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**BASIS**

We work across markets of all sizes, geographies, cultural and linguistic nuances. But across all of these, one which comes up recurrently, possibly most often, as the environment where global and even regional insights teams can struggle, or have had bad experiences, or just aren't quite sure they absolutely 'get' it... is China.

We've successfully run years' worth of studies on China alone, as well as multi-market pieces, across a swathe of audiences (from mainstream consumers, to the super-wealthy) and sectors like beauty, finance, health, and media. And we've learned that, of course, all the best practice rules we'd apply anywhere in the world are useful here too. But we've found that China is just different to anywhere else, in many ways. Below are a few specific dimensions of difference and challenges we've encountered, along with the strategies we've adopted to address them successfully.

新豐美酒斗十千，咸陽遊俠  
多少年。相逢意氣爲君飲，  
繫馬高樓垂柳邊。獨在  
異鄉爲異客，每逢佳節倍  
思親。遙知兄弟登高處，遍插  
茱萸少一人。  
塵客舍，勸君更  
進一杯酒，無故人盡  
爲政心閑物自閑，朝看飛鳥  
暮飛還。寄書河上神明宰，羨  
爾城頭姑射山。清朗月苦相思  
蕩子從戎載十餘，征玄日殷勤  
祝歸鴈。未數附書寄韓鵬，李



Challenge 1:

## The sheer scale of China and its population

For many of our clients, the immensity of China is their first thought, and it can be overpowering – where should we focus, and how do we define the right audience?

One of the wisest recommendations we've been given on China is to think of it not as one country, but more as Europe: a collection of different countries, with a huge spectrum of culture, affluence, cuisine, and language. In particular, there's a vast wealth and education gap between those in cities, vs. rural populations. Exposure to global brands (whom we're often researching) varies according to this, particularly for media; with platforms like Facebook, Instagram or Netflix only be enabled by VPN, they're accessible only to certain audiences. This affluence picture varies substantially across city tiers too.

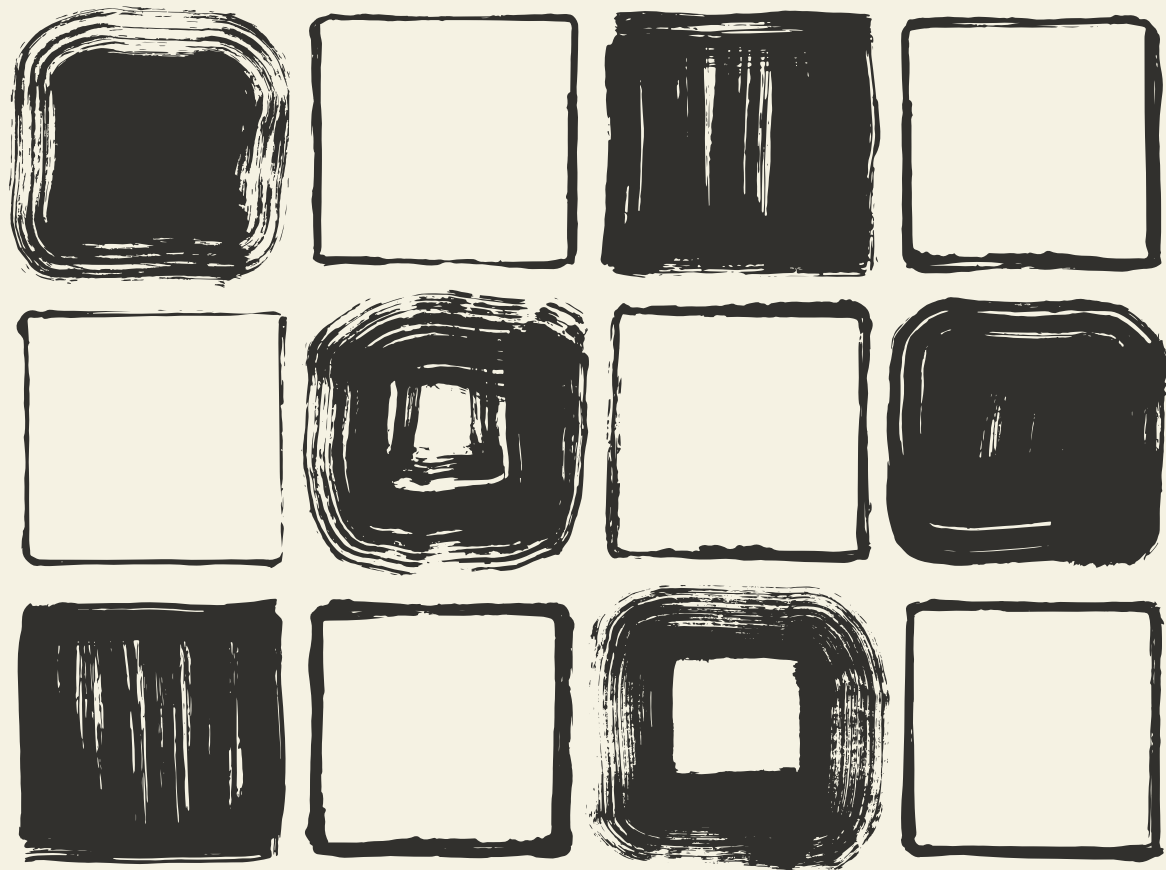
In reality, this means a few different things for us. Quantitatively, we set granular quotas by city tier to make sure we're not applying a one-size-fits-all framework. For qualitative,

we pick focus cities and areas recruitment carefully: often, we'll be in Shanghai and Beijing (for comparison, as we expect different reactions in each) as immediate markets for global brands. But depending on sector, may look for the right dimensions of aspiration and wealth in Tier 2 locations like Chengdu too. Equally, we've run in-depth qual in places like Yongzhou, a Tier 4, for clients seeking a wider audience and contrast with the megacities.

Within group-based qual environments, we're also sensitive to social structure. In other cultures, we might mix ABC1 participants in the same session or team. We don't do this in China, as wealth can be too stratified – we need to break this out, to better understand differences in response.

Challenge 2:

## Gear-shifting our thinking to a different (digital) ecosystem

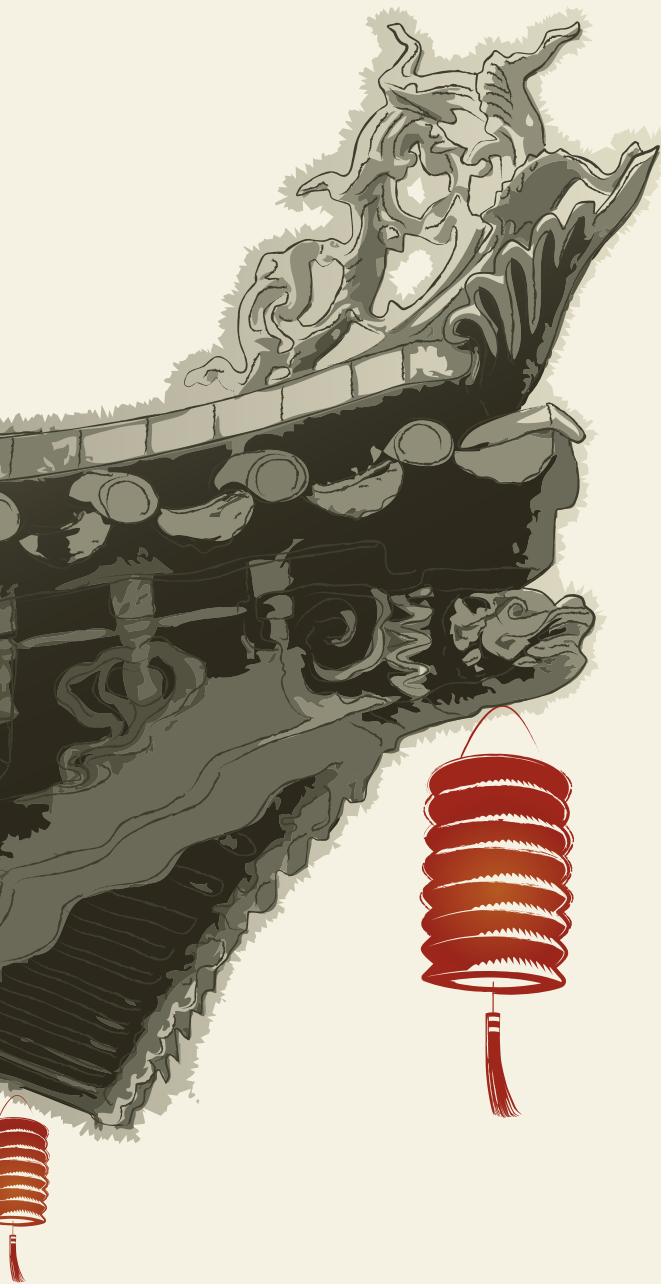


We're used to considering North American and European markets and technology as highly evolved. But the landscape in China is completely different; the push to advance, innovate, and adopt new things – by the mainstream, as well as early adopters and youth audiences – is fearsome, leading to speedy evolution in new digital platforms in particular. Studies show that even in 2018, 83% of all payments in China were made via mobile, through WeChat, AliPay, and others. COVID has only accelerated this, and by 2020, 98% of people claimed mobile was their most commonly used means of payment. 85% pay regularly by QR code, also used across everything from pet ID tags to postal services.

Brand horizons are radically different: instead of Amazon, we need to think about AliExpress, Taobao, or JD. And there are distinct channels too, like live commerce where KOLs (Key Opinion Leaders, like influencers)

sell products via livestreams on sites like Douyin, China's equivalent to TikTok. Because of this speed of retail evolution, expectations of service can be different to those in the West too: more immediately responsive, more interactive.

All of this creates an environment where trends are fast-moving and the bigger picture changes quickly. This impacts on our research in lots of ways: findings can become outdated more quickly than elsewhere. We need this context to interrogate our data, especially across longer-term tracking windows. And we have to understand how all of the above work in the same way a local would. For this, internal Mandarin-speaking resource and our youth insiders, help from teams on the ground, and local immersion in-market can be invaluable. Where possible, we take guided visits to physical environments, with verbal overlay from someone who can guide us through.



### Challenge 3:

## Ensuring we understand cultural context

Of course, at a functional level: the landmarks in the Chinese year are different, so we need to work around Chinese New Year, or Golden Week, or mid-Autumn festival in the same way as Christmas or Ramadan. We need to think about Single's Day, on 11th November, as opposed to Black Friday.

But there are many less simple dimensions we need to be aware of too. Gaining an honest and direct response in China isn't hard: people tell us what they think readily in qualitative sessions. But other dimensions under the surface differ. Academics have suggested that body language, including facial expressions, can be less 'exaggerated' in China than in the US; gestures and eye contact have different interpretations. Reading these cues as a Westerner is a challenge, because the rules aren't the same.

And there are deeper social constructs we bear in mind, which can affect response. The concept of 'face', and losing it (i.e. injuring one's social standing or reputation) can be hyper important, in the biggest Tier 1 cities in particular. Of course, anywhere in the world we might expect people to project an image which makes them look good in the eyes of others, but in China, this impacts on everything from logo-badging in fashion, to how people behave in business or when hosting guests. Without knowing this, it's easy for us to measure behaviour and commentary against Western standards, and gain a superficial read which doesn't take account of the social context. (Practically too, it means that we need to probe in qual sessions, to get beneath the surface of claimed brand affiliation and access actual day-to-day behaviours.)

Beyond that, there's a range of topics we need to treat carefully. Anything which touches on governmental authority is uncomfortable for people

to discuss, at all levels, even down to communication devices and patterns. We need to be careful with the themes we cover and explore: LGBTQ+ representation is banned in Chinese media, and portrayal of race and ethnicity can operate to different expectations. There are other small but important differences too, like censorship of ghosts and demons.

All of this means, in essence, we need to take extreme care to localise our approach, our sensitivity, and our analysis lens. Global brands have failed to do so before; like Burberry and D&G, ridiculed for efforts at localised Chinese comms seen as 'mocking' or 'missing the point'. Our priority in China is always to start from the position of understanding the cultural insights which might affect what we're researching; whether by piloting materials and sessions first, or just by consulting with our local project team in even more depth than we might normally.

Challenge 4:

## Finding the right local providers for the quality we need

China is a booming market for research. This has led to rapid expansion in the availability of services, at all price and quality thresholds. As one of our qual experts on China, Stephanie Chen of Mindsights, told us: “The most common complaint from international clients about China is that you can pay a lot for projects, but not get good quality in return.” So we look for extensive expertise in all aspects. We’ve found panel quality is varied, with hackers and fraudulent respondents a real risk. So we only use trusted panels, and check data rigorously - throwing in traps like speeders and verbatim checks as safety valves. And we prioritise senior, tried and tested moderators for qualitative. On project management, we build in buffer days and make sure every aspect is quality checked rigorously.



## Challenge 5:

# Methodological constraints which don't apply elsewhere

At a research geek level: pragmatically, there are some things we can't do or do differently in China, driving different approaches or evaluation frameworks. In quant: online panels skew younger, urban, and educated –and we need to bear that in mind when using these approaches. Qualitatively, some platforms (like Zoom) are fine; others don't work, or will suggest to participants that we're foreigners from the start and create a different dynamic. To get around this, again, we need adjust. For example, we've run WeChat online communities so the interface is second-nature and participants are more open to sharing.

Even our stimulus materials need extremely careful management and translation. This is a landscape where 'David Beckham' translates three different ways: 贝克汉姆 for mainland China, 碧咸 in Hong Kong, and 貝克漢 in Taiwan. So we need stimulus in simplified Chinese in China, vs. traditional Chinese in Hong Kong or Taiwan. This means we're completely dependent on translation, and pushing our clients outside China to make sure we have materials which do the right job for the right audience.

And even doing all of this: when it comes to interpreting and aligning China data alongside other markets', what works elsewhere doesn't always for China. Standardisation of quant scores would be necessary anywhere (and those in China tend to give high scores, on a global scale) – but more than this, response patterns can simply be different. Especially for segmentation studies, where we're looking to identify commonalities across markets, China can be an outlier. This means we need to determine the right path to follow for an authentic picture, including (in some cases) a China-specific segmentation alongside a global one.

Ultimately, getting research right in China comes down to tailoring of every facet of a project, to this different landscape. By doing so, with the right level of informed local input from those in our expert network (of Mandarin and Cantonese speakers and cultural insiders across our offices, as well as our partners in market), we can reach a level of insight which helps our clients know they understand the environment, and how to harvest the enormous opportunities it presents.

# BASIS

We'd love to tell you more about how  
Basis can help you with insight in China,  
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