

# BLINK

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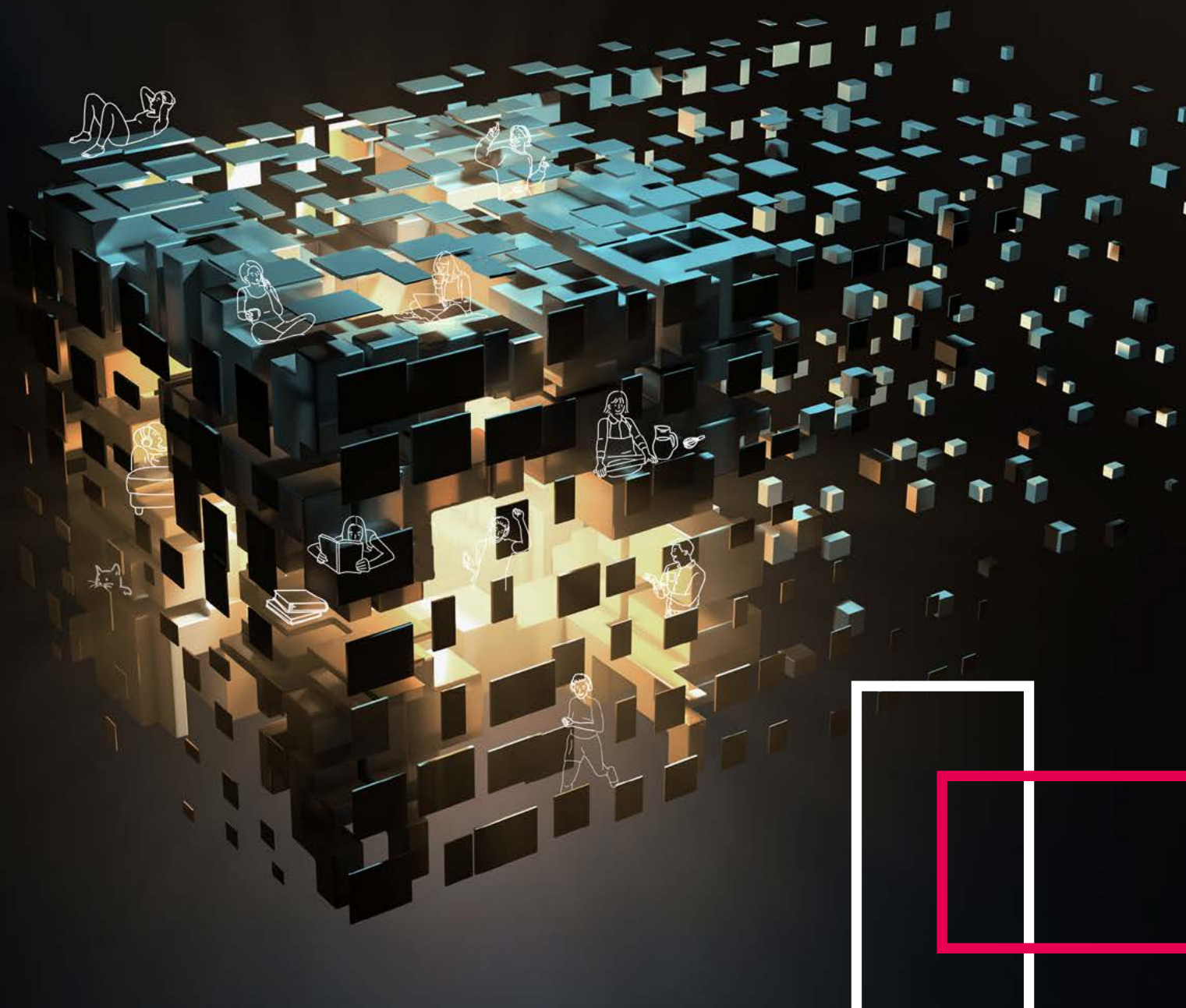
**MEDIACOM**

## CHINA AFTER DARK

中国夜间经济

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12 | 2019



**竞立媒体帮助品牌通过媒介实现增长。我们运用特有的系统思维方法，综合数据、技术和创意来制定打造品牌和促进销售的传播战略。**

竞立媒体是全球营销传播服务集团WPP的一员，隶属于WPP旗下媒介投资管理集团群邑，这让我们拥有丰富的数据资源以及行业前沿的经验和实践，使我们能够找到最佳的增长途径以释放每个品牌的潜力。

作为专业的媒介传播机构，竞立媒体年度媒介承揽额达135亿美元（来源：COMvergence，2019年3月），在全球100个国家和地区设有125个办事处，员工多达8,000人。其全球客户包括阿迪达斯、阿里巴巴集团、中国国际航空、戴尔、玛氏、宝洁、标致雪铁龙集团、历峰、和壳牌等。

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

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

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

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# Is Late Night The New Prime Time

Internet usage of Chinese consumers peaks post 9PM and sleeping hours have reduced by 26% since 2013. So, if China is sleeping less, what else are they doing in the late hours of the night and how does it affect their lifestyle and consumption behaviour?

MediaCom commissioned a national research program and uncovered 7 key areas where there is a growing demand for new services and information, providing clear recommendations and inspiration for effective use of media after dark.

This paper challenges advertisers to reflect on whether their brands are ready to grow in the after dark economy and helps marketers unlock growth in this increasingly important segment of the day.

## 深夜，一个新的黄金营销时段？

我们发现中国消费者的上网高峰出现在晚上9时之后，同时，每晚睡眠的总时数比2013年减少了26%。那么，消费者减少了睡眠时间，他们睡前究竟在做什么？这会如何影响他们的生活方式和消费行为？

竞立媒体近期在全国范围内实施了一项研究项目，并发现了7大关键领域，这些领域对新服务和信息的需求不断增加，为深夜有效的媒体营销方式提供了明确的建议和启发。

本文将帮助广告主思考他们的品牌是否准备好在夜间经济中不断成长，并帮助市场营销人员解锁在这一日趋重要的营销领域中的业务增长。



**Howard Thompson**

竞立中国首席战略官

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## 时间就是一切

众所周知，消费者行为正在发生快速的转变 - 数字化的消费行为在各行各业飞速发展。诸如流媒体视频之类的许多数字媒体消费习惯在 20 年前甚至都不存在。

即便在这些新趋势形成的过程中，消费者的行为方式也已发生了变化。微观洞察消费者行为的内容、地点和方式，可以帮助广告主获得比主流趋势更深入的见解，并更好地了解他们的消费者。

根据群邑集团的消费者家庭数据工具《山海今》显示，消费者的上网高峰出现在晚上 9 时之后。进一步深入探究这一时间段后，我们发现中国消费者每晚睡眠的总时数比 2013 年减少了 26%。无论以何种标准来看，如此降幅着实令人惊讶。中国消费者减少了睡眠时间，那么他们睡前究竟在做什么？



品牌亟需在这些观察的基础上挖掘业务增长的机会，因此竞立媒体著名的数据导向型趋势研究机构 Foresight Factory 在上海、广州、北京、西安、太原、武汉和海口这七个城市部署了 12 名洞察趋势侦察员，在 37 天的时间里深入了解“夜间”经济

中的消费者行为、品牌行动和增长机遇。本报告专注于为营销者揭示日益重要的深夜时段中蕴藏的业务增长机会。接下来您需要思考的问题是，您的品牌是否已准备好在深夜经济中挖掘成长机遇？因为时间就是一切。

### 我们的趋势洞察侦察员网络



## 不断延长的工作时间影响了中国人的睡眠时间

据报道，中国的都市人平均每晚只有 6.5 小时的睡眠时间，与 2013 年平均每晚睡眠 8.8 小时相比有了大幅下降，我们认为其真实睡眠时间甚至可能比本报告给出的数字更少。

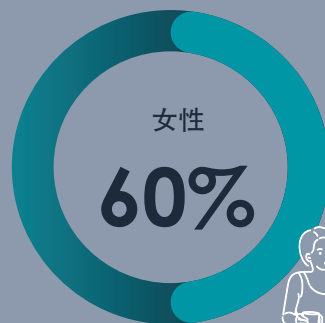
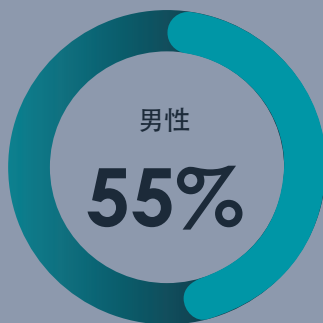
(来源：《财经》，CNRS 2016-2019)



中国的高强度工作文化是导致这一现象的重要因素，许多中国劳动者形成了 996 的工作规律，即朝九晚九、一周六天的工作制 - 这可能是公司的要求（例如，延长工作时间是科技行业的常规），而从

更广泛的文化层面上来说，这可能也是出于员工的自我奉献，许多人工作到很晚，只为证明他们的价值，以便公司能考虑提拔他们。

### “工作对于社会身份而言至关重要”



来源：Foresight Factory | 2000 名 16-64 岁的受访者，2019 年 5 月

## “996”

2016 年 10 月，分类广告网站 58 同城开始实施每周六天、每天朝九晚九的工作制度，这是 996 工作现象首次进入公众视线。随即它便在网上受到了员工阶层的抨击。

2019 年 3 月 27 日，软件开发代码托管平台“Github”上一个题为“996ICU”的帖子流传开来，“这是中国软件开发之间流传的一个讽刺说法，意思是遵守 996 制度，就是在冒着进 ICU（重症监护室）的风险工作。”

2019 年 4 月 12 日，阿里巴巴发表了其首席执行官马云的一篇文章。他在文章中为长时间工作这一做法作辩护：“能做 996 是一种巨大的福气，很多公司、很多人想 996 都没有机会。如果你年轻的时候不 996，你什么时候可以 996？你一辈子没有 996，你觉得你就很骄傲了？”

在马云的观点引起热议之后，人们玩笑地造出了“007”这个词，即一周七天、全天无休地工作，这更接近中国科技公司的现实工作状态。这种说法最初由《中国科学》杂志报道，而后又被其他新闻平台转载。



## 哪些人是典型的夜猫子？

中国的国内生产总值在 2019 至 2023 年期间预计将增长 48%（来源：欧睿国际），随着科技产业的快速发展，我们预计长时间工作的文化在短期内将不会发生变化。根据美团研究院的研究结果，2018 年有 1,400 万年轻人在晚上 8 点后于办公室点外卖，这表明人们的工作时间延长了。

### 夜间消费者

#### 哪些人是典型的夜猫子？



来源：2019 年中国熬夜晚睡年轻人白皮书；2019 年中国年轻女性熬夜自救白皮书

在高压的 996 或 007 工作文化之下，努力工作的人们需要释放压力的途径、并享受他们赚得的个人财富。而时间的紧缺让他们不得不常常将自己的活动推迟到晚间。许多人工作至晚上九点或十点才下班，并在临近午夜时才吃晚餐。

在工作中度过漫长的一天后，中国消费者希望将工作抛之脑后，在深夜的餐厅、酒吧和其他夜生活场所与朋友们聚会。他们非常乐意通过消费将夜生活纳入生活的一部分。诸如“#人生苦短元气要满”等话题在社交媒体上大行其道，证明了许多人对活在当下、享受生活的向往。



“为了享受生活，中国的年轻人很乐意去消费！诸如 #人生苦短元气要满等话题在社交媒体上大行其道。他们更愿意通过外出消费来获得满足感。”  
— 袁冰，海口

## 在夜间放飞自我

在整个中国，新的酒吧和餐厅，以及桌游咖啡馆、夜市、24 小时书店和虚拟现实 / 游戏场所等其他活动不断地涌现，为那些想在结束长时间工作后放松身心的人提供了丰富多彩的选择。研究显示，消费者一直在寻找更加多样化的享乐方式，因此，只有最独特和新奇的体验才会在他们面前脱颖而出。

### 你知道吗？

北京三联韬奋书店是北京首家 24 小时书店。店内空间分为作家签名区、收银区、咖啡区和休闲用餐区。除了书籍，这里还出售文具和文化创意产品。顾客可以在这家书店里度过美好的一晚！你可以点一杯咖啡，买一本书坐下来看，还可以买一些精美的书签  
— 窦维基，北京



### 你知道吗？

如今，你在晚上也可以吃到早餐了。这些新兴的早餐店只在晚上 9 点至第二天早上 9 点之间营业。那为何还称它为早餐呢？因为他们会供应本地的特色早点！对于很晚才下班或起床的人来说，这真是太方便了  
— Matilda, 上海



### 你知道吗？

“吃面”是一家在夜间营业的特立独行的公司，它将寻常的写字楼变成了供应面食、烧烤和啤酒的创意咖啡馆。诸如此类的概念吸引了许多年轻人，让他们可以在下班后放飞自我，尽情玩乐  
— 韦小姐，广州



## 释放压力的需求

丰富多彩的夜间娱乐活动需要满足不同受众的特定需求。尽管年轻人一向是夜间经济的主要受众群体，但抓住机遇与其他受众群体建立联系也很重要。营销者应该将这些多样化的夜间活动动机应用到他们的产品和服务中，使消费者的夜生活更有趣、更便利、更高效。

### 1. 帮助成年人逃离现实的“玩乐”形式日渐增多

越来越多的成年人在尝试诸如蹦床、主题游泳乐园等童趣休闲方式。我们的洞察趋势侦察员认为，这是因为他们希望在紧张的工作日之余享受纯真的快乐。

你知道吗？

复古室内街机游戏以及复古的食物、时尚和音乐悉数回归。人们发现，要是你想在夜间缓解压力，那么这些地方一定能让你感到幸福和兴奋——  
— 窦维基，北京



夜间水上乐园和室内蹦床主题公园是在上海观察到的例子，他们面向的正是在结束高压工作后寻求“趣味性”休闲活动的人群。

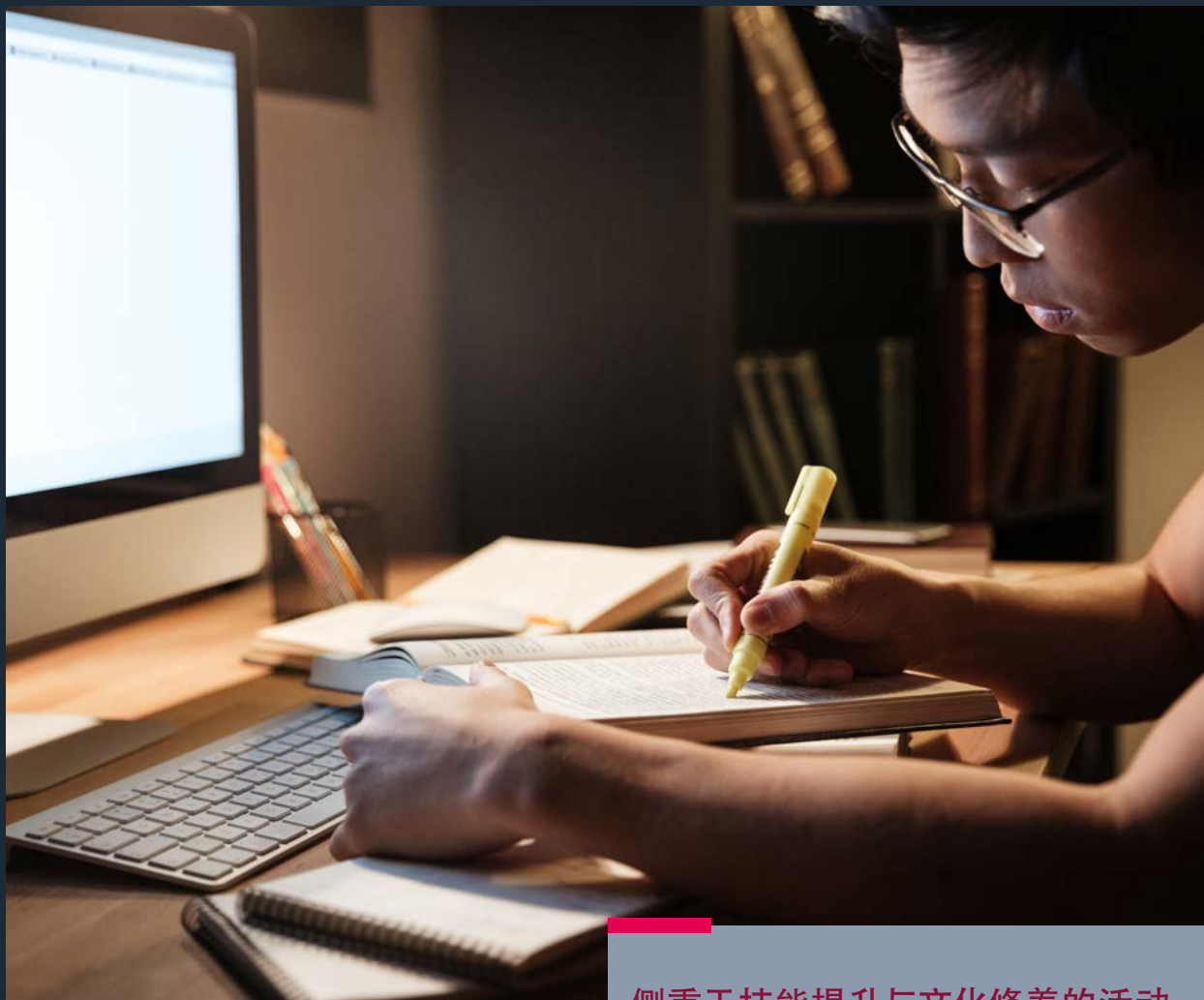


来源：<http://www.cnelc.com/>



来源：<http://www.lv mama.com/comment/3336802>

## 2. 自我提升式的休闲活动



对于多达 75% 的中国消费者而言，他们参加夜间活动是出于对自我提升的渴望。女性消费者们尤其关注这一点，她们中 78% 的人表示娱乐活动既要让人玩得开心，也要能让人增长见识。因此，无论在家还是外出，许多人都选择诸如学习新技能或提升文化素养这类既有趣、又轻松，同时也能帮助他们实现更高的精神追求的休闲活动。

### 侧重于技能提升与文化修养的活动

“人们喜欢参加不同的课程来提高他们的审美品味。越来越多的女孩喜欢参加油画班、插花班、手工课、瑜伽课、烘焙课和红酒品鉴班。”

— 袁冰，海口

“许多人认为高品质的独处时间，例如，相比于外出玩乐，在家学习、阅读、思考或者独自跑步，对于自我提升更有好处。”

— 窦维基，北京

### 3. 与此同时，其他人偏好夜间旅游

夜间旅游也已成为旅游目的地夜间消费市场的一个关注重点。随着地方政府在 2018 年的推动政策，携程旅游平台及其他旅游平台（来源：中国旅游研究院，2019 年）上的“夜间旅游”订单数量也同比增长了 9%。

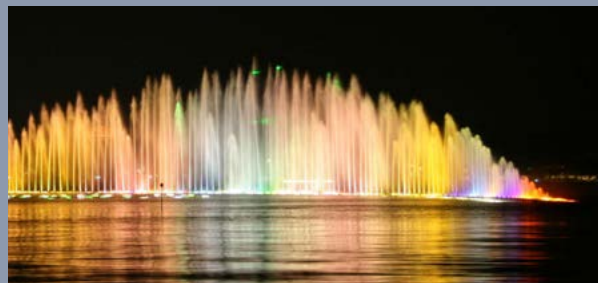
美国消费者新闻与商业频道 (CNBC) 在 2019 年 9 月一份题为“灯光秀和现场乐队：中国想通过促进夜间消费来刺激经济增长”的最新报告中多次提及“夜间经济”一词。据他们调查，就连医院也延长了营业时间，以便人们有机会利用自己的黄金时间来完成平日未能赶上的选择性医疗服务预约。政府希望通过这些举措，方便人们在普通营业时间以外也能有更多时间进行消费。

中国有多个城市正在投资发展夜间灯光秀。根据《国际商业时报》（“中国夜间经济：北京通过丰富人民的‘夜生活’来推动发展”，2019 年 9 月），刺激夜间经济的工作甚至包括加大当地的景观照明力度，一些地方计划投资超过 1 亿元（约 1,400 万美元）用于城市美化和 LED 灯光照明。

#### 与文化景观相结合的热门灯光秀景点



故宫灯光秀的门票在数秒内售罄



西湖音乐喷泉

来源：<http://dp.pconline.com>



太原汾河桥立交桥灯光秀

来源：<https://baike.baidu.com/>

## 4. 深夜生活影响健康

人们的睡眠时间从 2013 年的 8.8 小时大幅下降到 2018 年的 6.5 小时，夜宵也越吃越多，随之而来的是消费者对于夜间健康生活兴趣的增长。

### 夜生活对健康所产生的影响引发了人们的担忧

“熬夜会助长不良的习惯（爱吃零食、休息不足等）”

- Daniel, 上海

“熬夜加班和急需释放压力的状态可能会引发很多健康问题”

- 韦小姐, 广州

“我常常因为熬夜而感到自责，因为这是很不健康的习惯。晚睡的日子里，我总是觉得头痛，视力也下降了”

- 谢宇飞, 广州



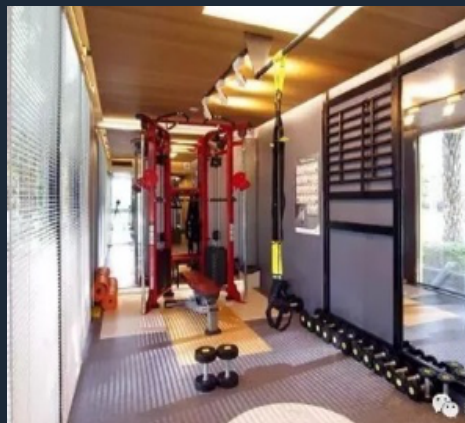
在中国，健身房的办卡会员数量逐年上升，在千禧一代和富裕消费者群体中更是如此。这与广泛关注的健康趋势有关，而越来越多的健身场所提供灵活营业时间，也进一步推动了行业的增长(例如，

成都一家 24 小时健身房采取无员工值守的方式，但消费者可以通过使用手机扫描二维码来使用内部的设施)。繁忙的工作不再是身材走样的借口。

### 你知道吗？

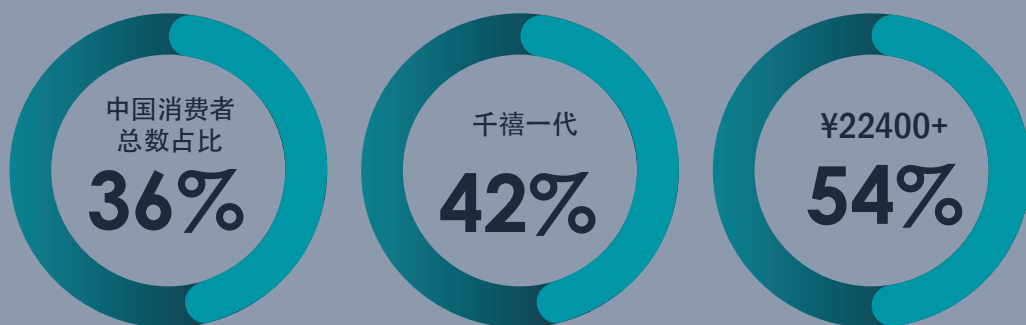
24 小时全天候营业的超级猩猩是改变全国健身行业格局的主要品牌之一。用户可使用自己的手机进入健身房，并按小时或课程付费。这一理念在经常旅行或加班的上班族中颇受欢迎

- 谢宇飞, 广州



许多健身房正在采取行动，通过探索创新理念来增加客流量，例如通过搭配节奏强劲的音乐或选择多功能场所，在营造团队氛围的情况下开展健身课程。上海的 SpaceCycle 提供优质的健身体验，在自由举重和跑步机旁边同时开设了一间健康食品门店和一处设施齐全的“放松”区。这样会吸引顾客的到来，即使不锻炼，他们也可以在那里放松身心或享用健康零食。

#### 办理健身卡的人群占比



来源: Foresight Factory | 基础人群: 2001 名 16-64 岁的网络问卷受访者, 中国, 2019 年

研究显示，这种爱动生活的趋势远远超越了传统健身的范畴。多达三分之一的中国消费者声称，他们每天都会进行体育运动或锻炼。越来越多的消

费者选择在晚上到外出骑自行车、玩滑轮、跑步或跳广场舞。

#### 你知道吗？

一些大学会举办荧光夜跑活动，让学生将荧光灯戴在手上或头上，以此来推动学生形成健康的生活方式，尤其是夜间的生活方式。山西大学的荧光夜跑活动就是一个例子。他们的口号是“地球上最明亮的 5 公里竞赛”。这种荧光夜跑活动将跑步和游戏相结合，让学生在夜间进行跑步，同时通过小游戏向他们发起挑战，从而促进身体健康

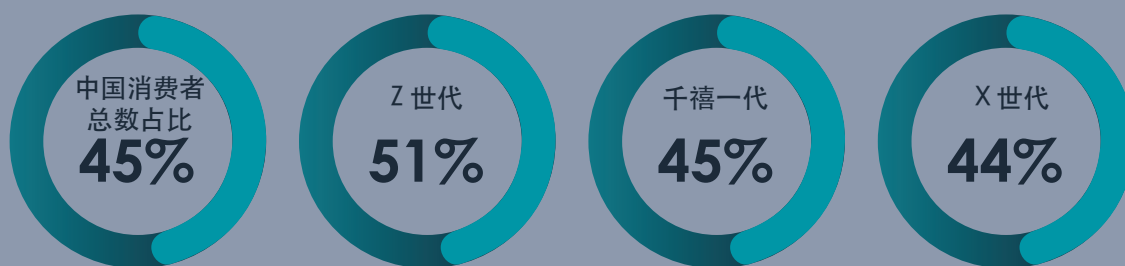
— Lukas, 太原



## 深夜独宅的生活方式仍旧颇受欢迎

尽管有大量的夜生活选择，45%的中国消费者仍表示他们更喜欢在家消遣，而非外出。有趣的是，这是最年轻的一代人的偏爱，而非老年消费者 - 后者更喜好户外消遣活动，广场舞已成为许多城市公共场所备受欢迎的活动就是后者的完美体现。

相比于外出，我更喜欢在家消遣  
% 同意 / 非常同意占比



来源: Foresight Factory / 基础人群: 2001 名 16-64 岁的网络问卷受访者, 中国, 2019 年

根据调查显示, 人们会因为各种原因而在夜晚宅家,

1. 待在家中可以节省开支, 尤其是在经济增长放缓的形势下;
2. 结束一天的漫长工作后, 人们需要独处, 单纯放空;
3. 因为多玩家游戏等智能手机活动的出现, 那些喜欢社交的人现在也可以在家里舒服的玩。



## 生活方式的转变影响人们的媒体消费习惯和行为

他们在晚上 9 点后会做些什么？

睡前普遍在做的事：



78.8%



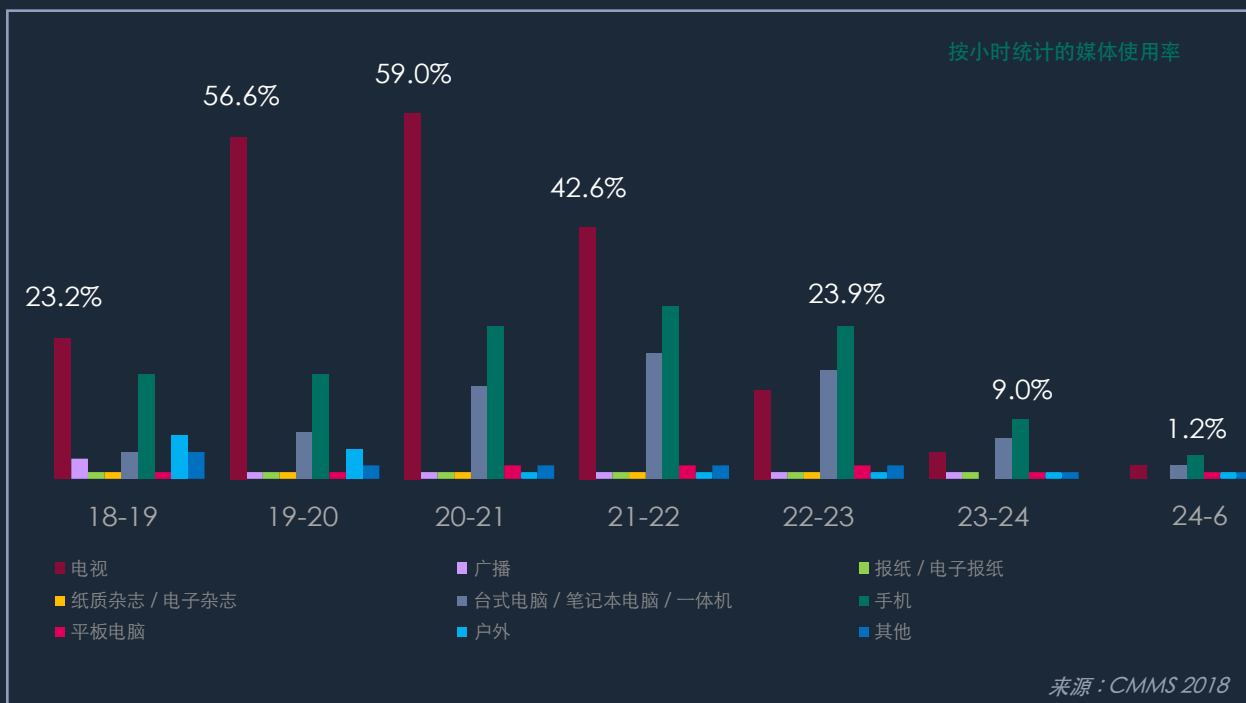
50.5%



48.9%

睡前使用最多的应用程序：通讯 (62.7%)、视频 (52.5%)、资讯 (48.9%)

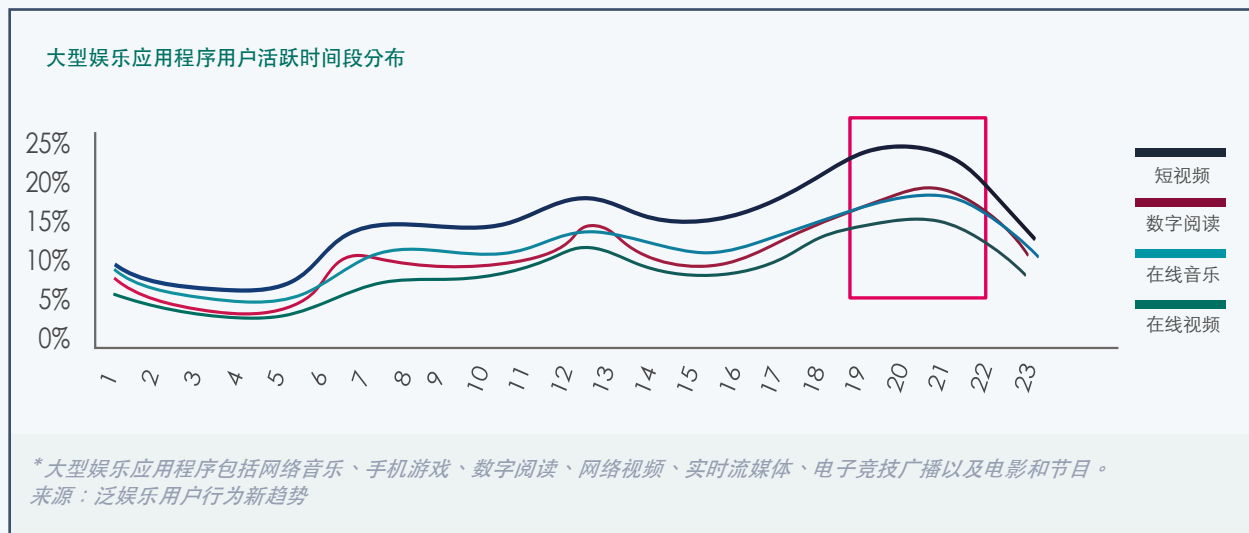
人们主要在晚上 10 点之前看电视，11 点之后则转向使用手机。



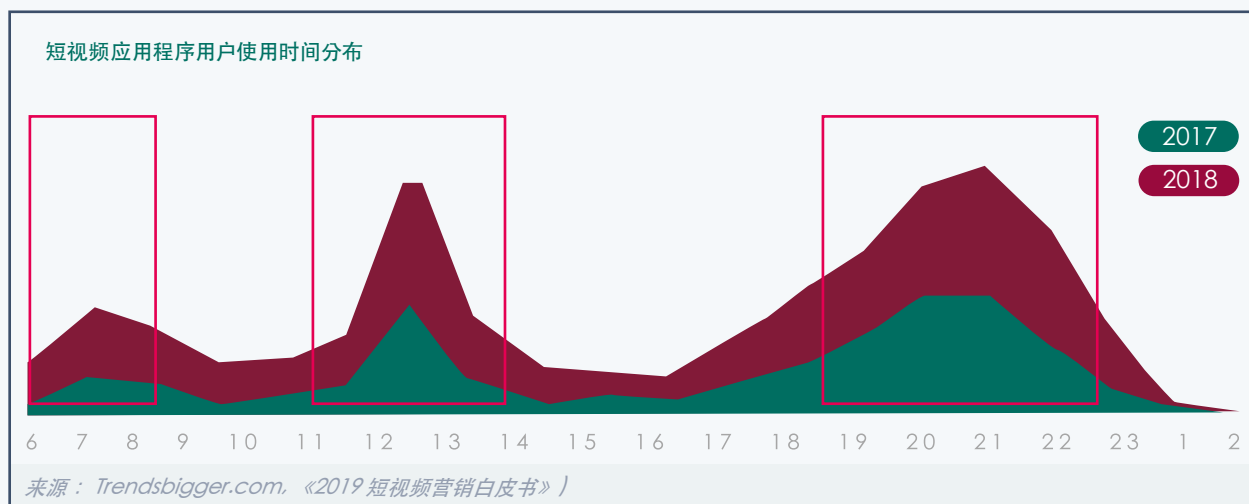
通常情况下，内容消费是在移动设备上进行的（这是睡前最普遍的活动，占 78.8%）。随着微信和抖音在中国社交媒体平台上占据主流，对即时通讯应用和视频应用的偏好也更加显著 - 62.7%的人会使用通讯和聊天应用，而 52.5% 的人 would 观看视频。

观众一边开心地吃着袋装零食或方便面，一边随心所欲地在抖音等应用程序上观看短视频、电视剧或现场直播的选秀节目。

观看短视频是占比最高的一项活动，随后才是数字阅读、网络音乐和网络视频。



在短视频流量方面，有3个短视频使用高峰：上班前、午餐时间、下班后加睡前。图中的趋势表明，人们比以前入睡更晚了，晚高峰时段已经推延至晚上10点。



你知道吗？

猫是年轻人最喜欢的宠物。Cloud Cat 可以让猫主人在社交网络上分享自己的猫，并浏览与猫相关的内容。像 Maoka 这样的关键意见领袖在哔哩哔哩网站上的视频浏览量已经超过 170 多万次  
— Godfrey, 广州



## 虚拟社交带来真实体验

越来越多的中国人接受并认可虚拟游戏和电子竞技是一项“真正的体育活动”。

玩游戏可以让人们在夜晚实现隔空社交。对于宅家一族而言，这是一项非常受欢迎的深夜活动。尽管游戏可能被认为是一项独自的活动，它在本质上却相当社交化。至少一半的中国 Z 世代消费者会每天在网络游戏中与他人对决。

“现在大家较少在晚上线下会面。相当一部分夜间活动已经上转移到了网上，像我大多数朋友都喜欢玩‘绝地求生’游戏。”

— Mr. Guoyu, 广州

以往的观点认为，爱玩游戏并不是一件好事，但如今这种偏见正在迅速消失，因为越来越多人承认整个电子竞技和游戏活动是一项“真正的体育运动”，而它也绝对是一项值得大家在晚上花时间的娱乐活动。

“电子竞技越来越被人们所接受，也越来越得到广泛的认可，因为游戏的恶名正在消退。”

— Daniel, 上海

“玩游戏不只是为了乐趣，对于越来越多人来说，它是一项专业的技能和运动。”

— 谢宇飞，广州





## 家庭责任也是夜生活的重要部分

有时，深夜在家不出门也不意味着这会是一个轻松的夜晚。对于许多人，特别是有孩子的家庭而言，他们晚上的时间更有可能是花在做家务上 - 根据中国城市居民调查 (CNRS) 的数据显示，与全国平均水平相比，一线城市的工作人群在晚上 9 点以后从事家务劳动的指数要高得多。人们会在夜里处理杂事或做家务，这一点从他们在深夜中使用得最活跃的手机功能上得到了体现。

例如，晚上 9 点过后是小额贷款高峰期。据统计，从晚上 7 点至次日早晨 6 点，在网上商业银行办理小额贷款的比例高达 26%。晚上 10 点后，全国咨询量最高的公共服务是生活开销、公积金和医疗保健。环境保护是关注度增长最快的问题，人们越来越多地将时间用于参与垃圾分类、公益活动和其他公共服务中。（来源：2018 年《阿里巴巴城市之夜》报告）

“我们通常会和宝宝待在一起，直到他入睡。然后周末会带他出去玩。我需要在晚上 10 点到 12 点利用琐碎时间看书和准备第二天的工作。去健身房、慢跑、或和朋友小饮一杯是一件很奢侈的事情。[...] 有时我需要照顾家人，没有时间专注在工作上，所以 [最后变成了] 熬夜工作到凌晨 2 点。”

— 韦小姐，广州

在中国，越来越多的宠物主人也有类似的压力，他们会因为把宠物留在家中而感到内疚，希望在晚上回家后弥补错失的相处时间。幸运的是，对他们来说，养宠物也有很多好处，除了有心爱的宠物陪伴，还能培养新的兴趣（例如学习如何给狗梳理毛发）和社交内容（例如，在视频聊天中炫耀自己的宠物）。



## 夜间经济催化出便利文化 2.0

中国的便利文化愈演愈烈，导致对送货物流服务要求变得越来越高，送货上门时间前所未有的缩短了。

随需服务行业努力迎合夜生活的需求，更多的送餐服务延迟了打烊时间，并承诺在下单后 30 分钟甚至更短时间内送达。对于希望最大限度地享受休息时间，而不必花时间购买杂货或自行下厨的人而言，这种服务方案倍受欢迎。

中国日报最近的一份报告显示，中国的网络订餐量和送餐市场在 2018 年达到了 4415 亿元（658 亿美元），同比增长 112.5%。

你知道吗？

最近，一些快递应用程序还提供一种特殊服务，你可以支付 15 元人民币，让送货员在 1 小时内帮你跑腿购买所需的商品，并送货上门。

— 袁冰，海口

随着服务的提升，消费者的要求越来越高，快递行业的参与者们必须提供更高品质的产品或更好的体验才能做到与时俱进。

超过 30% 的夜间餐饮消费发生在晚上 9 点以后，这也是夜宵的黄金时间。根据京东 2019 年五月至七月的销售数据显示，午夜订单量同比增长了 60%。除此之外，相比前几年，便利店在午夜的线上销售量增长了 40%。

### 按需送餐服务开放至深夜

晚 1 点是广州一个著名的晚餐外送品牌，每日营业至午夜，专注于提供优质的鲜辣海鲜外送服务。该公司可根据顾客需求提供现场服务。例如，它可以为顾客提供惊喜送餐和表演服务 - 由此，将夜宵服务提升至全新的水平！



## 把握这次增长机遇

### 对于品牌的启示和机遇

如今，中国的工作时长甚于以往，消费者可以用于自己心仪的活动的也变得前所未有的宝贵。为了帮助品牌在这个机会窗口中实现增长，竞立媒体对中国消费者在夜间的核心行为和期望进行了研究。



夜间生活常常会造成不健康的生活模式，因而引发了许多消费者的担心，但他们并不认为自己有能力改变这种情况。

各品牌有机会以伙伴的身份帮助消费者形成更健康的夜间爱好与生活方式——通过提供意见、产品等解决方案来引导他们获得更好的睡眠模式，在深夜为他们提供更有营养的饮食选择，并鼓励他们在家和在外参加健身活动。



由于消费者工作到很晚，且次日一早就要回到办公室，因此，与以往相比，他们的夜生活开始得较晚，持续时间也较短。

这一现象，加之如今更丰富的居家休闲选择，意味着品牌为外出活动提供服务时，需要确保其产品能够从激烈的竞争中脱颖而出，并让消费者认为他们值得为此外出。产品服务重点要放在独特且令人惊喜的体验上，同时也要善于利用消费者希望获得轻松休息和提升自我的两种不同需求。



工作时间的延长促生了两种看似矛盾的消费者类型——下班后希望隔绝与外界联系的宅家一族，以及想要更多各种夜间休闲选择、好奇心十足的都市一族。

您需要了解自己的品牌面向哪一种受众，并确保根据他们的核心需求来优化您的产品或服务，以便他们在家中或外出时都能尽情地享受晚上的时间。



由于中国消费者的下班时间比以前晚，以往在白天或傍晚发生的活动如今都已转移到晚上 9 点以后，所以对于品牌活动应该在何时铺开，我们应多加斟酌。

由于以往的“日间”活动如今变成了夜间活动，因此请想想您的品牌可以探索其他哪些相关垂直领域。如果人们更常在夜间去健身房，您能为他们提供哪些相关的辅助服务，比如深夜洗发或保健服务？下一个被推迟到晚上的“日间”活动又会是什么？



夜间活动的增加不仅吸引了年轻人，也吸引了越来越善于利用夜间体验的中老年消费者。

然而，品牌不应单纯地将注意力限制于他们的受众范畴。跳广场舞就是个很好的例子，年轻人开始觉得，广场舞这种最初“很老套的爱好”作为一种夜间活动也相当有吸引力。



有家庭的中国消费者感受到了巨大的压力，他们希望与孩子共度时光，但这又进一步限制了他们的个人时间。

品牌可以打造适合所有家庭成员一起的产品、服务和活动，以此来吸引这部分受众，而不仅仅是关注父母、成年人或局限于孩子身上。这样，有家庭的人可以花时间在陪伴配偶和子女的同时，也满足自身的快乐。类似的，品牌也可以为宠物家庭提供同时适合主人与他们宠物的夜间活动选择。



尽管人们疲惫不堪，但仍希望尽量延长睡前的时间，由此，便利文化伴随夜间经济繁荣发展。然而，随着越来越多的公司进入这一领域，竞争加剧，消费者需求飙升。

中国的按需服务文化正在迅速迈向成熟——仅仅推出相应服务已经不够。消费者对于此类行业的要求越来越高：他们需要的不仅仅是解决问题，还有高品质的产品和体验。按需送餐服务行业尤其如此，消费者期待的不仅是更多、更健康的产品选择，还有更卓越的整体体验。

## TIMING IS EVERYTHING

It's a well-known fact that consumer behaviour is changing fast—digital first habits are growing rapidly in every sector. Most of those habits such as video streaming, for example, didn't even exist 20 years ago.

But even within these new trends, patterns are emerging and changing just as rapidly as they are forming. Fine grained thinking about what consumers are doing where and how helps advertisers see further than the main trends and become better acquainted with their consumers.

The GroupM consumer household data tool, ShanHaiJin, showed that consumer internet usage peaks post 9pm. Further exploration of this timing led us to the realization that the total number of sleeping hours per night had reduced by 26% since 2013. An incredible decline by any standards. The question was, if China is sleeping less, what else are they doing in the late hours of the night?



On the basis of these observations, there is an urgent need to uncover the business growth opportunities and thus MediaCom commissioned Foresight Factory, a leading data-led trends agency to deploy 12 insight trend scouts across the seven cities of Shanghai, Guangzhou, Beijing, Xian, Taiyuan, Wuhan and Haikou over a period of thirty-seven days

to delve into the behaviours, actions and opportunities within the “after dark” economy. What you will see in this report is only the tipping point to help marketers unlock growth in this increasingly important segment of the day. The question is “Is your brand ready to grow in the after dark economy?” Because timing is everything.

### Our Network Of Insight Trend Scouts



## Ever-Increasing Working Hours Impacting Sleep Time In China

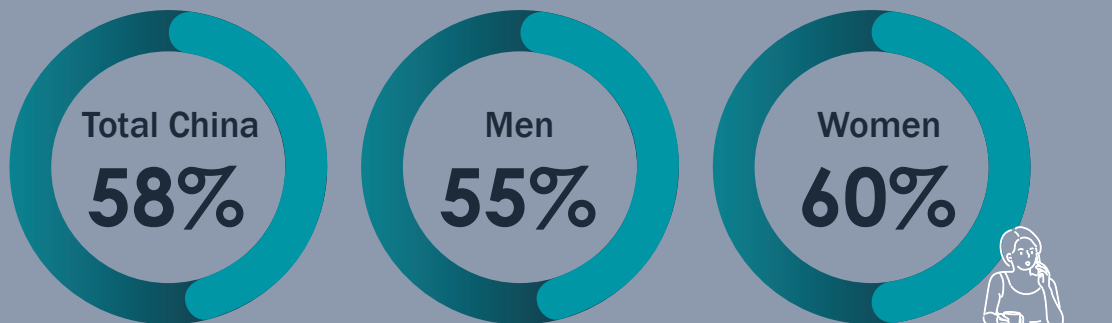
The average urban Chinese is reported to manage only 6.5 hours of sleep per night, a steep 26% drop from the 2013 average of 8.8 hours per night (Source: Caijing, CNRS 2016-2019).



The intense Chinese working culture is a significant contributor to this, with many Chinese workers developing a 996 routine, working from 9 to 9, for 6 days a week – either because it is demanded by their company

(prolonged working hours are standard for the technology industry for instance) or because of a wider culture of self-devotion that sees many work late in order to demonstrate their worth and to be considered for a promotion.

### “My job is very important to my sense of identity”



Source: Foresight Factory | Base: 2,000 online respondents aged 16-64, May 2019

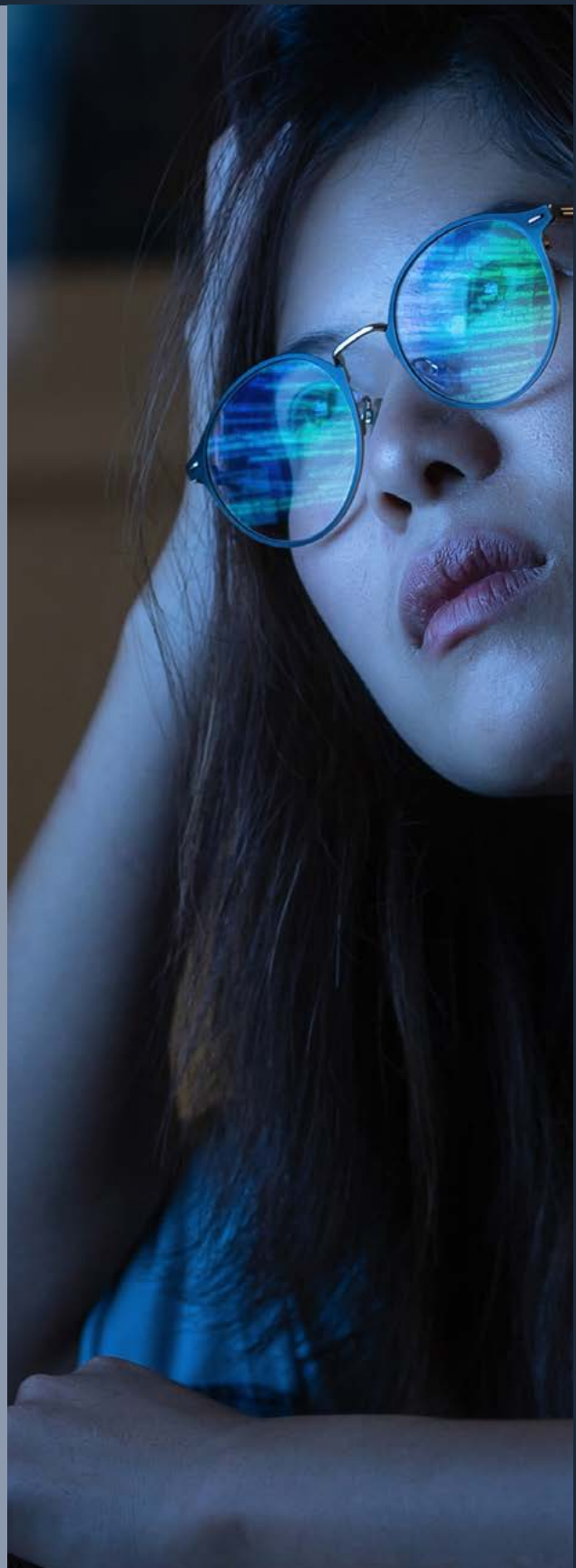
## “996: Origins”

The “996” work phenomenon was first exposed to the public in October 2016 following the classified advertisement website 58.com’s implementation of 9 am to 9pm six days a week work system. A system that was criticised by employees online.

Fast forward to March 27th, 2019, a post started trending on Github, the software development code-hosting platform titled “996ICU” “an ironic saying amongst Chinese software developers which means that by following the 996 work schedule you are risking yourself getting into the ICU (intensive Care unit)”.

On April 12, 2019, Alibaba published an article from its CEO Jack Ma defending the practice of long work hours saying it is a huge blessing that many companies and employees do not have the opportunity to have ... if you do not do 996 when you are young, when will you? Do you think never having to work 996 in your life is an honour to boast about” he said.

After Ma’s point of view aroused discussion, developers jokingly coined the term “007” midnight to midnight seven days a week was more like the reality of working in Chinese tech companies, first reported by Science China, then reprinted by other news platforms.

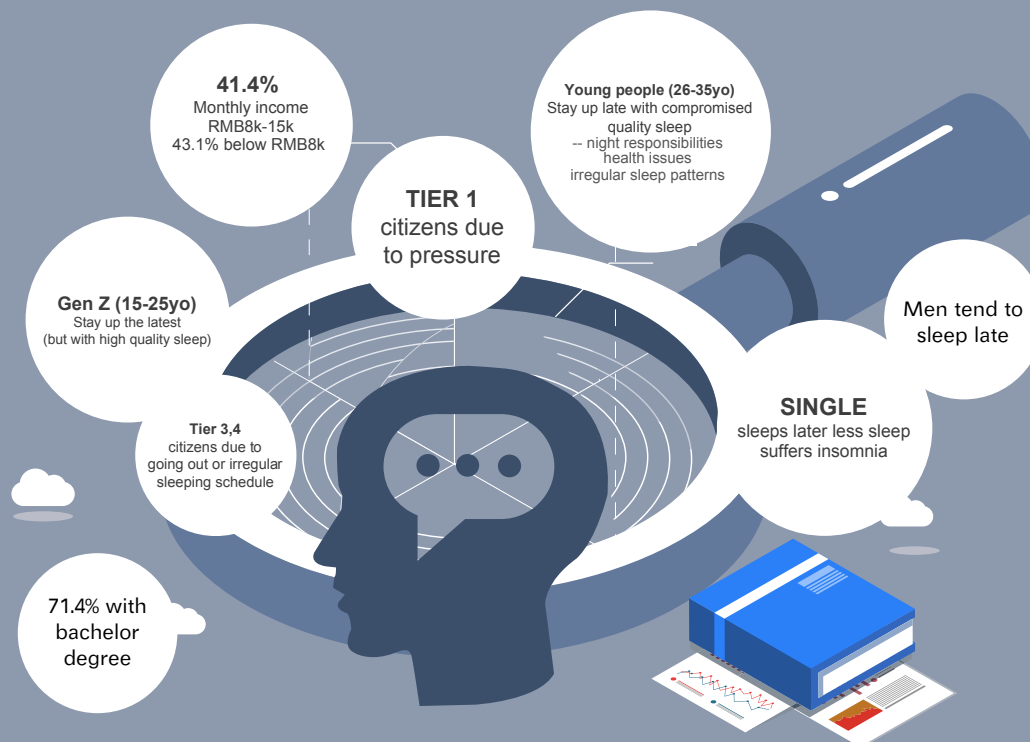


## Who Are Driving The After Dark Economy?

China's GDP is expected to grow by 48% between 2019-2023 (Source: Euromonitor) with major growth expected in technology industries specifically, as such, we can expect that the habit of working long hours will not change anytime soon. According to the Meituan research institute, 14 million young people ordered takeout to office areas after 8pm in the year 2018, indicating longer working hours.

### The After Dark Consumer

#### Who is our typical after dark audience?



Source: iResearch, 2019 white book of China's young people staying up late 2019 年中国熬夜晚睡年轻人白皮书; 2019 white book on how young Chinese women can save themselves from staying up late, 2019 年中国年轻女性熬夜自救白皮书

This high-pressure 996 or 007 working culture depends on outlets that allow hard workers to alleviate pressure and take advantage of their growing wealth. But time-poor consumers will often find themselves pushing their activities later into the evening, with many not even out of work until 9 or 10pm and dinner being eaten closer to midnight.

Chinese consumers want to put this long day at work behind them, joining friends at late-night restaurants, bars and other nightlife venues. They are willing to spend money to live it. Topics like # 人生苦短元气要满 "life is short and full of vitality" is getting so much traction on social media, proof that living it up is aspirational to many.



"Young people in China, they are willing to spend money to live it! Topics like #人生苦短元气要满 "life is short and full of vitality" trend on social media. They are more willing to get fulfilment through spending more money outside." Binny, Haikou

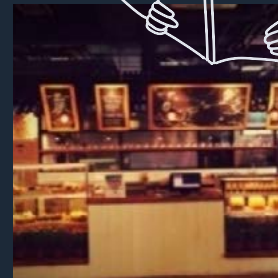
## Living It Up At Night

Across the country, new bars and restaurants alongside other activities such as board game cafés, night markets, 24-hour bookstores and VR/gaming destinations continue to pop up, providing an enormous array of options for those looking to unwind after many hours in the office. The research showed that consumers continuously seek more varied forms of indulgence and only the most unique and novel experiences stand out to them.

### *Did you know?*

Beijing Sanlian Taofen is the first 24-hour bookstore in Beijing. More than books, it sells stationery as well as cultural and creative products with the space divided up into author signing spaces, sales cashiers, a cafe and a casual dining area. A night in this bookstore is a wonderful experience! You buy a book, order a cup of coffee, read your brand new book, and buy some beautiful bookmarks

– Vicky, Beijing



### *Did you know?*

Now, you can find breakfast at night. These new breakfast stores open only at (9pm to 9am). Why it's still called breakfast? Because they serve the local breakfast favourites!. For those who get off work late and get up late it is really convenient

– Matilda, Shanghai



### *Did you know?*

Chimian (Eatingnoodle) is a unique business that, at night, turns regular office buildings into innovative cafés, offering noodles, BBQ & beer. Concepts like these attract many young people as they go wild and want to have fun after work

– Wei, Guangzhou



## The Need To Blow Off Steam

The after dark activities meet a wide array of different needs and should tune in to specific demands from different audiences. While younger generations have always been key players in the after dark economy, there are serious opportunities to connect with others

as well. Marketers should take advantage of the vast array of after dark motivations in their product and service offerings, making the nights of their consumers more fun, convenient, and productive.

### 1. “Play” For Adults Seeking Escapism On The Rise

There is a growing interest from adults seeking leisure options traditionally associated with children's activities, such as trampolining or thematic swimming parks. This is driven by the need for pure enjoyment after stressful office days.

Late night water park and indoor trampoline theme park which opens to adults seeking “fun” leisure after stressful work days are examples spotted in Shanghai

“ *Did you know?*

Retro indoor arcade games have returned along with retro food, fashion, music and so on. People find that such places offer happiness and excitement if you are looking for stress relief in the night

– Vicky, Beijing



source: <http://www.cnelc.com>



source: <http://www.lv mama.com/comment/3336802>

## 2. Self-Improvement Underpins Late-Night Leisure



For as much as 75% of all Chinese consumers, activities sought out in the previous late evening hours are underpinned by a desire for self-improvement. That number increases if we look at female consumers specifically, with 78% saying that entertainment should be about learning new things as much as simply having fun. Both in and out of the home, many choose to pursue leisure options that are entertaining, yet still contribute towards a greater purpose such as the learning of a new skill or simply becoming more cultured.

### Activities Focused On Upskilling & Cultural Refinement

"People like to take different classes to improve their aesthetic taste. More and more girls like to take oil-painting class, flower arrangement class, handwork lessons, yoga class, baking class and wine tasting class". Binny, Haikou

"Many find that high quality solitude such as studying at home, reading or thinking, and running alone, are better for self-improvement than going out for fun". Vicky, Beijing

### 3. Meanwhile Others Prefer To Go On “Night Tours”

The night consumer is already a staple in the tourism market with sightseeing cruises, lantern events and cultural experiences taking place at night. 2018 saw a 9% increase year-on-year of the number of orders for “Night Tours” on Ctrip and other travel platforms (Source: China Tourism Academy 2019).

A recent CNBC press report in September 2019 entitled “Light shows and live bands: China wants to boost its nightlife to spur the economy”, consistently referred to a “night economy” and examined how even hospitals had extended their operating hours to give people an opportunity to use their primetime hours to get elective medical appointments that they had fallen behind on. The effort was motivated by the government’s interest to give people more time to spend their money, outside of standard business hours.

Multiple Chinese cities are investing in the development of night-time light shows. According to the International Business Times (“China Nighttime Economy: Beijing Boosts ‘Night Life’ To Push State Growth” September 2019) efforts to spur night-time economies even include expanding local landscape lighting, with some localities planning to spend more than 100 million yuan (approx. US\$14 million) in urban beautification and LED lighting.

#### Popular Light Show Combined With Cultural Attraction



Forbidden city light show, tickets sold out in seconds



Music fountain in West Lake



lightshow on Fenhe River bridge in Taiyuan

source : <https://baike.baidu.com>

## 4. Late Night Living Can Be A Barrier To Health

With a steep drop from 8.8 hours of sleep in 2013 to just 6.5 hours in 2018 and a bigger appetite for late night dinners, consumers show an increasing interest in using their night hours to improve their health and wellness as well.

### Concern About Late Night Living's Impact On Health

"Late nights sleep encourages bad behaviours (snacking, lack of proper rest, etc)"

- Daniel, Shanghai

"Night life spent on overtime and much needed pressure release can cause health problems"

- Wei, Guangzhou

"I often feel guilty for sleeping late, because sleeping late is very unhealthy, I always feel headache, and eyesight loss when I slept late"

- Godfrey, Guangzhou



Gym subscriptions in China are on the rise year-on-year, especially among Millennials and wealthier consumers. This is linked to a broader focus on health trends, but is further boosted by the flexible opening hours offered by more and more fitness

establishments (e.g. a 24-hour gym in Chengdu which is unstaffed but allows customers to use the facilities by scanning a QR code with their phones). A busy working life no longer condemns consumers to being out of shape.

### *Did you know?*

"Late nights sleep encourages bad behaviours (snacking, lack of proper rest, etc)"

- Daniel, Shanghai

"Night life spent on overtime and much needed pressure release can cause health problems" - Wei, Guangzhou

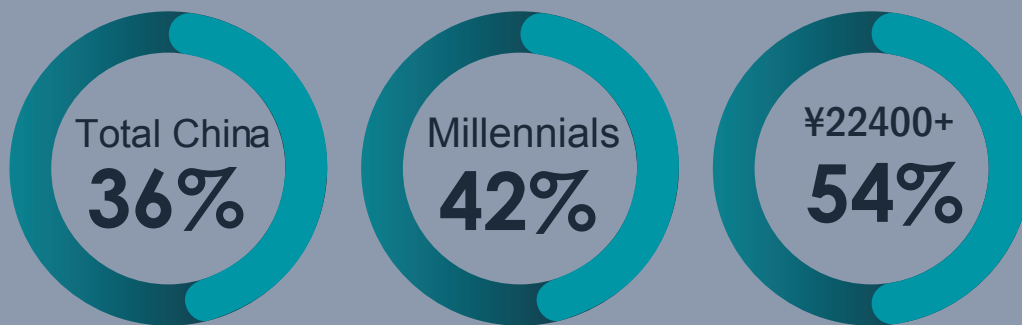
"I often feel guilty for sleeping late, because sleeping late is very unhealthy, I always feel headache, and eyesight loss when I slept late"

- Godfrey, Guangzhou



Gyms are taking steps to increase their traffic by exploring innovative concepts such as fitness classes in a club-style atmosphere with loud music, or multi-purpose locations. SpaceCycle in Shanghai offers a premium gym experience which includes a healthy food shop and a holistic “chill” area happily co-existing alongside the free weights and treadmills. This invites patrons to return even if not for a workout but a chance to unwind or have a healthy snack.

### % who own a paid gym subscription



*Source: Foresight Factory / Base: 2001 online respondents aged 16-64, China, 2019*

The research shows that the active living trend reaches much beyond the walls of traditional fitness establishments. As much as a third of all Chinese consumers claim to

play sports or exercise at least daily. More consumers are heading outside in the late evenings to cycle, rollerblade, run or square dance.



### *Did you know?*

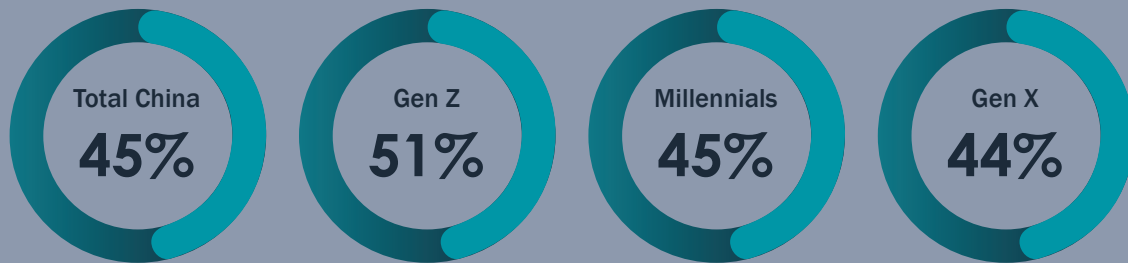
Some universities hold fluorescent-night-running activities to stimulate healthy lifestyles especially at night. Students wear fluorescent lights on their hands or on their heads. Here's an example of Shanxi University's fluorescent night run. Its slogan was “the brightest 5km race on the planet”. This fluorescent night run was a combination of running and an exciting game, letting the students feel healthy at night by running and also challenging them with small games  
– Lukas, Taiyuan



## Late Nights Home And Alone Remain Popular

Despite the huge amount of nightlife options available, 45% of Chinese consumers say they prefer to spend their leisure time at home instead of going out. Interestingly, this is not driven by older consumers – who, if anything, are now spending more time outside, nicely demonstrated through the popularity of square dancing in many public spaces across cities – but rather by the youngest generations.

I prefer to spend my leisure time at home rather than going out  
% agree/agree strongly



Source: Foresight Factory / Base: 2,000 online respondents aged 16-64, May 2019

According to the research,

there are multiple drivers for this tendency to stay home at night

1. The cost-efficiency of staying at home especially in the context of a cooling economy;
2. The need to be alone and simply relax after a long working day;
3. The introduction of more smartphone-driven activities like multi-player mobile games which allow even those who do prefer to socialise to do so from the comfort of their own home.



## Lifestyle Shifts Impacting Media Consumption And Behaviour

### What are they doing post 9pm?

#### Top activities before sleep :



78.8%



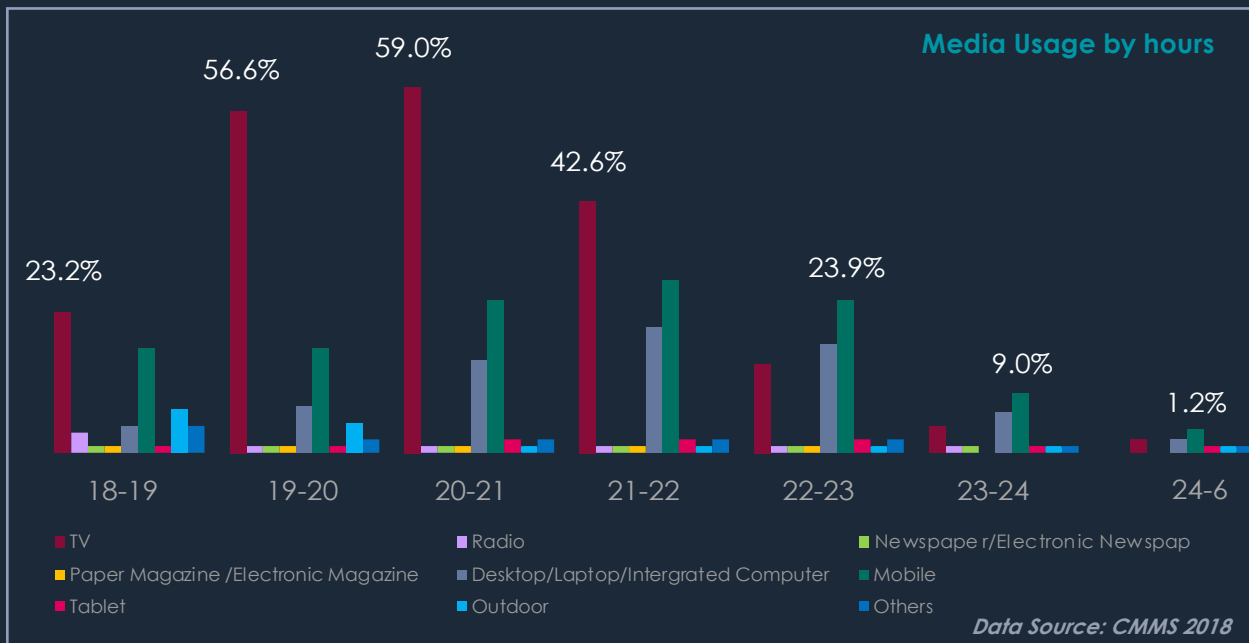
50.5%



48.9%

Top app used before sleep: communication (62.7%), video (52.5%), information (48.9%)

### TV viewing mainly happens before 10pm and switches to mobile phone usage from 11pm onwards

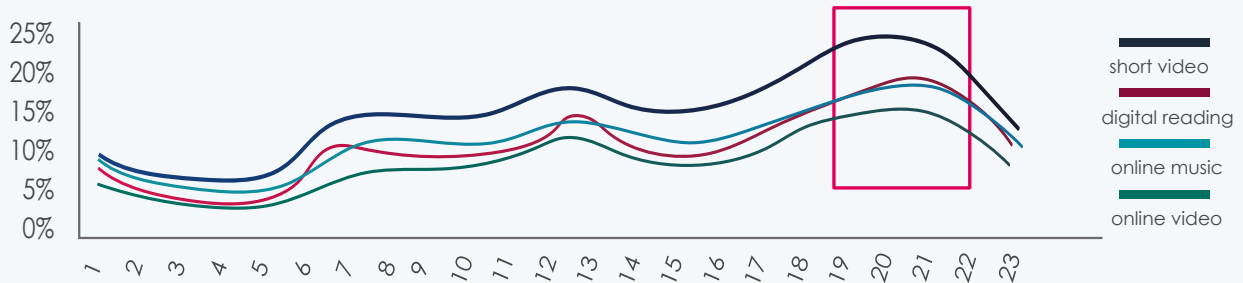


Typically, content is consumed through mobile devices. With WeChat and Douyin dominating China's social media platforms, preference for IM apps and video apps are showing significantly higher penetration - 62.7% use messaging and chat while 52.5% consume video. While 52.5% consume video.

Viewers happily switch between munching a bag of snacks to instant noodles, watching short-form videos on apps like Douyin, and longer-form TV dramas or live broadcast talent shows depending on their mood.

## Short video users get the highest activity other than digital reading, online music and online video.

Activity period distribution of big entertainment App users

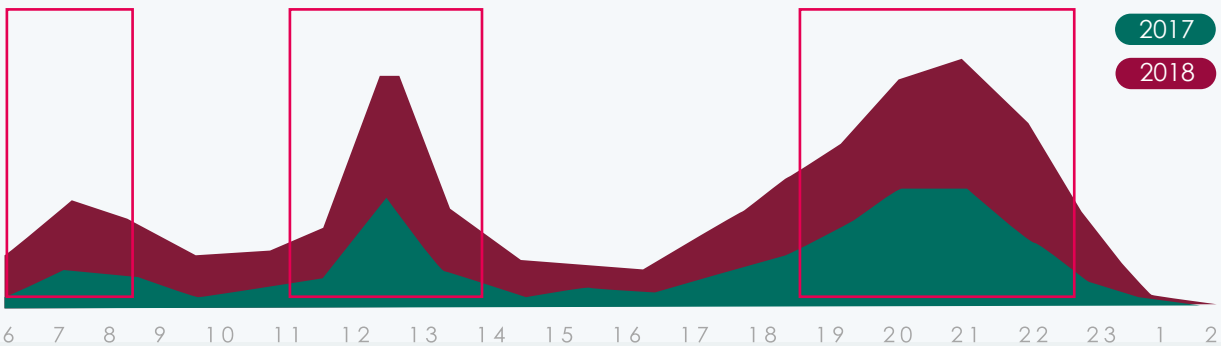


\* Big entertainment APP includes online music, mobile games, digital reading, online video, live stream, E-sports broadcasts and movies and shows.

SOURCE: Source: QuestMobile, the new trend of entertainment behavior 泛娱乐用户行为新趋势

In terms of the traffic volume of short videos, there are 3 short video peaks: Before work, lunch time, after work and before sleep. The trends are indicating that people are staying up later and that peak time is as late as 10pm.

Using time distribution of short video app users



Source: Trendbigger.com, 2019 Short video marketing white paper 《2019 短视频营销白皮书》

## Did you know?

Cats are the most popular pet among young people. Cloud Cat is an APP for cat owners to share their own cats on the social network and watch cats' content for hours. Some KOL like Maoka can have video viewed 1.7million+ times on Bilibili  
— Godfrey, Guangzhou



## Virtual Socialising Is Real

Virtual gaming and e-sports are increasingly accepted as “real sports” in China. Gaming allows socialising from a distance after dark. It is a hugely popular late-night activity for those who prefer to stay at home. While gaming might have the reputation of being an isolating activity, it is often in fact a rather social one. 1 in 2 GenZ consumers in China play games online with other people at least on a daily basis.

“People don’t meet each other much at night offline. Part of the night activity shifts to online, like most of my friends love gaming PUBG”.  
– Mr. Guoyu, Guangzhou

Any stigma that used to be associated with gaming as an activity is rapidly disappearing, as e-sports and gaming overall are increasingly recognised as a “real sport” and definitely as a valuable enough activity for consumers to spend their late-night leisure time on.

“E-sports are becoming more accepted and widely recognized, the stigma behind gaming is disappearing”. Daniel, Shanghai  
“Gaming is not just for fun, it’s a professional skill and sport for more and more people”.  
Godfrey, Guangzhou





## Night Time Is Also Filled With Responsibilities

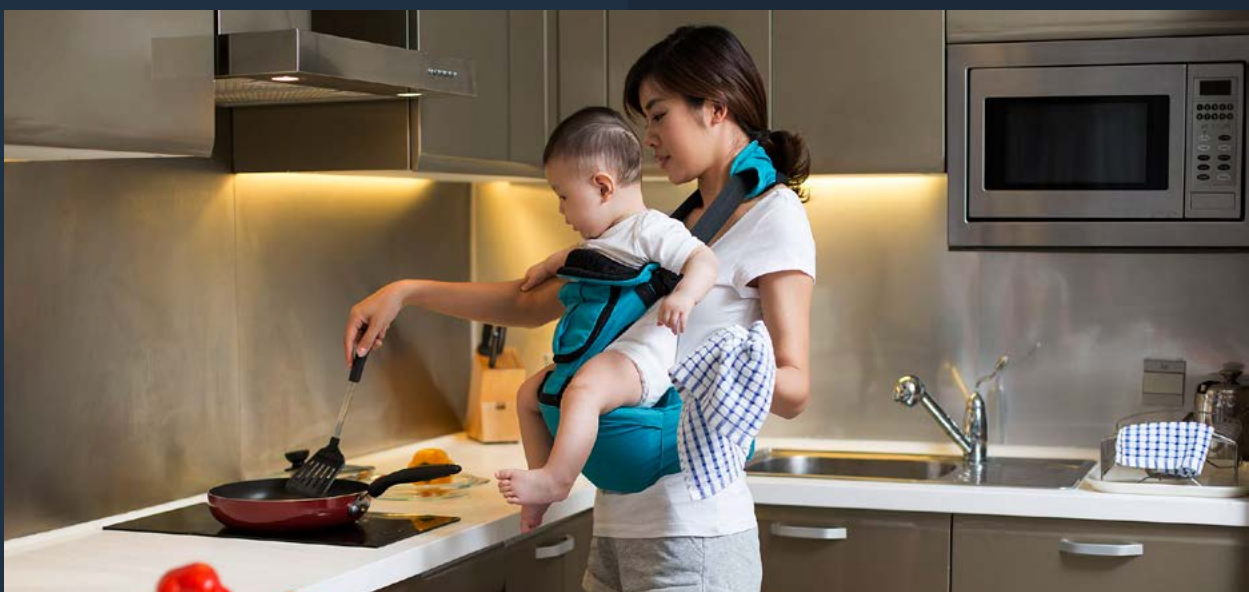
Being at home late at night doesn't always mean a relaxing night. For many, especially parents with kids, night time can be consumed with chores – Based on China's National Residents' Survey (CNRS) data, chores after 9pm has a much higher index amongst the Tier 1 working crowd when compared to the national average. People run errands and do chores at night which is demonstrated in their most active mobile functions during late evening hours.

For example, after 9pm is when micro-lending peaks. According to statistics, the proportion of micro-lending of online commercial banks between 7pm and 6am is as high as 26% . From 10pm onwards, living expenses, provident fund and medical health are the most inquired public services in the country. Environmental protection is the fastest growing concern, and as a result, information about garbage classification, public welfare and other public services become more and more consumed. (Source: Alibaba City Night Report 2018)

"We usually stay with the baby till he gets to bed and takes him out for fun during weekend. I need to pick up pieces of time from 10pm-12pm to read books and prepare work. Gym/jog/a drink with a friend can be a luxury. [...] Sometimes I need to take care of the family and have no time to focus on work so [I end up] working until 2am". Wei, Guangzhou

A similar sense of responsibility is also felt by the growing number of pet owners in China, who feel guilty about leaving their pets at home and want to make up for lost time once they get home in the evenings. Luckily for them, pet ownership also comes with a

lot of benefits, beyond the companionship of their loved animal, such as new interests (e.g. learning about dog grooming) and reasons for socialising (e.g. showing off pets in video chats).



## Convenience Culture 2.0 With Ever More Demands In The After Dark

China's convenience culture is ever-intensifying with delivery services bringing any product or service to consumers within ever-shrinking time spans.

The on-demand sector is, understandably, increasingly catering to life after dark, with more food delivery services staying open until later, promising delivery within 30mins or less – a very welcome evolution for those who want to maximise their short section of downtime without having to focus on doing groceries or cooking themselves.

According to a recent China Daily report, the volume of China's online food ordering and delivery market hit 441.5 billion yuan (\$65.8 billion) in 2018, up 112.5% year-on-year.

### *Did you know?*

These days, some delivery apps also provide a service where you can pay 15 Chinese yuan and the delivery man will buy anything you demand to your home in an hour

– Binny, Haikou

As the offer is growing, consumers are getting more demanding, and the delivery economy players will have to up their game to stay relevant by offering higher quality products and by creating an experience around their service.

There are over 30% of night dining consumptions spent after 9pm, which is the golden time for favorite mid-night snacks. According to JD.com's sales data from May to July 2019, overnight orders increased by 60% year-on-year. On top of this, online convenience stores overnight sales were 40 % up compared to previous years.

### On-Demand Food Services Available Until Late

晚1点, is a famous supper delivery service in Guangzhou. It opens at night and specializes in fresh spicy seafood with excellent service. The company can offer tailor made on-site service. For example, the delivery can prepare surprise deliveries and performances for customers – taking late-night supper to a whole new level!



# Capitalising On This Growth Opportunity

## The Implications And Opportunities For Brands

Working hours in China are longer than ever, and the time consumers can devote to the activities they are eager to invest in is more precious than ever. To help brands secure growth in this window of opportunity, MediaCom explored what the core behaviours and expectations are from Chinese consumers at night.



**Late night living often creates unhealthy lifestyle patterns, which is a cause of concern for many consumers – but not something they feel equipped to change themselves.**

Brands have an opportunity to act as a partner in helping consumers obtain healthier habits and lifestyles after dark – guiding them in their quest to obtain better sleep patterns through advice and product solutions, offering them more nutritious on-demand food options late at night, and encouraging them to take part in fitness activities both in- and out-of-home.



**As consumers work until late and are expected back in the office in the morning, nightlife starts later and lasts shorter than it used to.**

This, combined with more extensive in-home leisure options, means that brands targeting the outdoor space need to really focus on ensuring their offering stands out from the ever-growing competition and is clearly worth leaving the home for. The focus should be on experiences that are unique, surprising and also tap into underlying consumer needs for light relief on the one hand or self-improvement on the other.



**Prolonged working hours drive two seemingly contradictory consumer types – the homebody who wants to switch off entirely once they get to leave the office, and the curious urbanite who sets out to make the most of the expanded range of night-time leisure options.**

Understand which of these two audiences your brand is catering to and make sure you optimise your products / services for their core occasion, allowing them to enjoy either their night in an entirely guilt-free way, whether in or out of home.



**As Chinese consumers leave the office later than before, many activities which were previously associated with daytime or the early evening have now shifted to 9PM or even much later. Any assumptions based on when activities should take place are under scrutiny.**

As previously “daytime” activities are now making their way into the night-time segment, think about which other verticals you might want to explore as a brand. If people go to the gym more often during the night-time, can you offer them any relevant ancillary services e.g. late-night hair wash or wellness? And what could be the next “daytime” activity that consumers might want to enjoy after dark?



**The expanding offer of night-time activities is not just attracting young people, but also speaks to older consumers who are increasingly taking advantage of late-night experiences.**

However, brands should not zero in on just one audience with their offering. Square dancing is a great example of how young people are now finding this originally ‘grandma hobby’ appealing as an after dark activity as well.



**Chinese consumers with families feel a high amount of pressure as they want to spend time with their children, which further limits the time they have for personal pursuits.**

Brands can appeal to this audience by creating products, services and activities that can be enjoyed by all family members rather than being focused on just parents/adults or just children – meaning those with families can spend time with their spouse and children, while doing something that also contributes to their personal enjoyment. Similarly, brands can cater to pet owners, by offering them night-time options that are relevant to the owner and the pet alike.



**The convenience culture thrives at night as people are exhausted yet want to maximise the hours before bedtime. However, as more companies enter this space, the competitive landscape intensifies and consumer demands soar.**

The on-demand culture is rapidly maturing in China – in order for companies to remain on people's radar, being present in the on-demand space is no longer enough. Consumers are becoming more demanding when using services as such: wanting better quality products and seeking experiences rather than just solutions. This is especially applicable to on-demand food delivery, which consumers will look to for a wider and healthier selection of products, as well as an overall experience that goes above and beyond.

China's After Dark by MediaCom China inspires and helps brand owners find new growth opportunities in unexpected occasions, segments and business models in a refreshingly new look at the marketplace.

Is your brand ready to grow in the after dark economy?

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If you are looking to uncover business growth opportunities in the after dark economy or interested in a full presentation of China After Dark, please contact:

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