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CHINESE CONSUMERS IN THE GLOBAL AND DIGITAL ERA AND THEIR UNDERSTANDING OF POLISH PRODUCTS

INTRODUCTION

Four consecutive decades of opening-up and economic reform have transformed China from a poverty-stricken country to one of the world's largest economies. Along with the soaring economy and structural reform, urbanization has accelerated although quality and sustainability still await improvement. China's National Bureau of Statistics reports that the country's current urbanization rate stands at 58.52%.[1] Urbanization and social transformation drive the emergence and explosive growth of the country's middle-class. A study by McKinsey & Company predicts that 76% of China's urban population will qualify as middle-class, with 54% meeting the criteria of the upper-middle class by 2022.[2] The growth of the Chinese "middle class" means an increasing purchasing capacity and confidence as well as changes in consumption habits. All these are manifested in three phenomena that are now observable in China. One of them is the growing number of Chinese students going abroad to receive education, which as a matter of fact, is an expensive product. Currently, China is the largest source of international students to many countries.[3] Another conspicuous development is an increase in outbound trips made by Chinese tourists. Many Chinese urban dwellers and young people regard outbound tourism as a measure of happiness, a way to maintain wellbeing and a shopping opportunity. As of today, China has become the largest source of outbound tourists in the world. The number of outbound trips hit 129 million in 2017.[4] A fifteen percent increase in the number of Chinese outbound tourists was reported in the first half of 2018.[5] The third phenomenon is an increasing abundance and diversity of imported material and non-material products on China's market and changes in people's consumption behavior. China is becoming a market with a growing potential and demand for cultural and material products from other cultures. Products of international brands prevail and compete with local brands to suit consumers' preferences.

Poland established bilateral diplomatic relations with China as early as in 1949; however, the countries' economic relationship only saw a strong strengthening in 2011, with the establishment of a strategic partnership between Poland and China.[6] Polish institutions and agencies devoted to bilateral trade and cultural exchange were set up in major Chinese cities in recent years. Nonetheless, in competing with other European countries, Western European countries in particular, Poland rather falls behind not only in the exports of material and non-material products to China, but also in taking Chinese students and outbound tourists. For years, Poland has been experiencing a drastic trade deficit and an export/import imbalance with China.[7] Despite some progress made in recent years, Polish exports to China are still way behind its imports from China.[8] As for educations, statistics show that as of 2016 Polish universities hosted fewer than a thousand students from China.[9] On the tourism market, only about 130,000 Chinese tourists visited Poland in 2017.[10]

While restructuring its economy from the export-oriented one to that driven by domestic consumption, China steadily furthers its opening-up and reform, fully embraces global trade and opens its domestic market wider to imported products, services and international trade by gradually introducing a slew of import tariff cutting measures and investment market optimization policies.[11] Poland's participation in the "Belt and Road" Initiative and the "16+1" mechanism has laid political foundations for all-round cooperation and exchange between Poland and China.[12] If Polish business companies, cultural institutions and individuals are to win a share of China's market (whether in terms of the source market of international students, outbound tourists or the consumption market for cultural and material products imbued with cultural values),they vitally need to obtain some detailed knowledge about Chinese target consumers, their consumption interests, propensities and general understanding of Poland and their expectation for Polish product.

While a lot of studies on Chinese consumers are currently available, research on Chinese consumers' behavior and preferences vis-à-vis cultural products as well as on their knowledge of Poland and consumption of Polish products is very scarce. This study was conducted not only to generalize some insights about Chinese consumers, the level of their knowledge about Poland and Polish products as well as underlying reasons and key barriers they face, but also to formulate some proposals that could help promote Polish products in an economic and efficient way. To fulfill this aim, two structured surveys were successively designed, and data was collected from targeted Chinese urban residents. The first survey was a long and also major one in this study. It focused on capturing an image of Chinese consumers and their level of understanding about Poland as well as their attitude towards Polish product. In the survey, typical cultural products (e.g., theatre, movies, literature, TV programs, music, etc.), rather than material products, were set as consumption products so as to meet research purposes, because in this study the "product" was treated as a generalized term broadly referring to both material and non-material cultural products and products imbued with culture values. The second short survey aimed to capture a snapshot of the current presence and promotion effect of Polish products on China's market as well as the participants' preferences for promotion methods, materials and channels.

This paper consists of five sections. The next section discusses the materials and methodology used in the study. The following section mainly presents the findings of the first major survey. The fourth section further analyzes the results of the first survey and investigates causes behind the data with some supporting figures collected from two surveys. The last section concludes the insights and discusses proposals which were generated from the minor survey and which could be workable and helpful in promoting Polish products.

MATERIALS AND METHODS

1. THE FIRST MAJOR SURVEY

In the study, the data for analysis was collected through surveys. The first major one was an anonymous electronic questionnaire including over 40 questions, which was designed with a rigid logic on a Chinese online platform and distributed among the participants through popular Chinese social network apps. Middle-class urban dwellers from different consumer segments were the survey's target participants, including: a) members of generation Z (born after 1995, a generation believed to be the most westernized Chinese consumer, forming the next big consumer market and purchasing powerhouse);[13] b) younger millennials (born 1990-1995) and older millennials (born 1980-1990), who together make up a current strong consumption driving force;[14] c) people born in the late 1960s and 1970s (members of this generation now assume higher social positions, occupy the business leadership roles and enjoy good incomes);[15] d) people in their 50s and 60s (this group includes some wealthy and affluent retirees who switch their attention from work to quality life of health and happiness. Given that these retirees have relatively plenty of spare time and sufficient disposable income on their hands, they certainly are contributors to be reckoned with in China's economy and outbound tourism).[16]

As for the geographical scope of the study, cities in three tiers were covered and grouped into "tier 1 city", "tier 2 city" and "tier 3 city" categories, respectively. Distinction between city tiers was predominantly based on socio-economic criteria; therefore this study's classification of cities into tiers did not necessarily correspond to the tier system as defined in terms of administrative hierarchy. "Tier 1 city" was mainly represented by two megalopolises: Shanghai and Beijing. "Tier 2 city" included the highly developed city of Suzhou and the vital prosperous port city of Nantong in East China's Jiangsu Province. "Tier 3 city" was primarily represented by Lanzhou, the capital city of the less-developed Northwest province of Gansu, which is also the geographical center of China.

The questionnaire was comprised of four parts. It started with the participant's profile, followed by questions regarding the participant's consumption of on-site cultural products (e.g., programs, exhibitions, activities, etc.) and the factors that influenced his/her decisions; the subsequent questions inquired about the participant's choice and consumption of foreign cultural products; and the last part focused on the participant's knowledge about Poland, current consumption status of Polish cultural products, major concerns and expectations. In between these four parts were questions related to the participant's life style and the channels usually utilized to access cultural products.

The survey data collection lasted from late July to early November 2018. In the study, research guidelines concerning the population size/sample size ratio were taken into account.[17] Because the survey only targeted the growing and current urban middle-class and practical operational difficulties were encountered, 255 reliable questionnaires were ultimately retained for examination. This sample size was sufficient to generalize some useful insights and to fulfill this study's research purpose with the general margin of error of 10% and the confidence level of 95%. The analysis of the survey results involved representing the quantitative data in a graphic form and providing descriptive summaries.

2. The second minor survey

The second survey was an anonymous electronic questionnaire which only comprised 9 questions and was disseminated later via the popular social network apps among Chinese urban consumers, mainly based in Eastern China.

Questions in the short survey were divided into three groups. The first group was to capture the participants' consumption and perception of Polish products' presence on China's market. The second group was to establish the participants' exposure to the advertising and promotion of Polish products in media channels. The third group regarded the effectiveness of this promotion. The participants were asked what promotion methods, materials and channels unutilized by Polish institutions were more convenient, better accessible and preferred. The participants' constructive suggestions and thoughts about the promotion of Polish products were also collected at the end of the survey.

The survey was collected at the end of November 2018. The trend of survey count versus survey result was carefully monitored during the collection process. The matrix of key data indicator versus survey count was closely tracked. The trend of data performance showed that past the threshold 100, the growing number of surveys did not have any obvious and perceptible impact on the trend, and that collecting more surveys would not incur any significant changes in data performance. The data performance change rate was within the range of ±3-5% after the survey count mounted over the threshold of 150. Taking both resource saving and the fulfillment of the research purpose into consideration, the study set 200 as a reasonable survey count at the confidence level of 95% and the margin of error of 5%. All in all, a total of 244 valid questionnaires were collected for analysis.

THE RESULTS AND ANALYSIS OF THE MAJOR SURVEY

1. BASELINE CHARACTERISTICS OF THE STUDY SAMPLE

The overall demographic information is summarized in Table 1, and the breakdown by city tier is shown in Chart 1. The participants came from all walks of life, with services, education, business & commerce weighing higher than other industries (e.g., manufacture, technology&engineering, finance, medicine & healthcare, media and culture, etc.).The occupations of those surveyed were very diversified. Given the difference in the purchasing power between a student and a person with a job, the participants were grouped into student and non-student subsamples.

City Tier	Female	Male	Total
Tier 1	103	37	140
Tier 2	31	22	53
Tier 3	42	20	62
Total	176	79	255

Table 1. a) Number of survey participants by city tier

Gender		Educational Level					Occupation	
Male	Female	Below high school	High school	University	Master	PhD	Student	Non-student
69,02%	30,98%	3,92%	10,20%	55,69%	26,67%	3,53%	12,16%	87,84%
Age								
<18	18-25	26-30	31-35	36-45	46-50	51-55	56-60	>60
0,39%	13,33%	19,22%	20,39%	32,16%	9,02%	2,75%	1,18%	1,57%

Table 1. b) Overall demographic information of survey participants

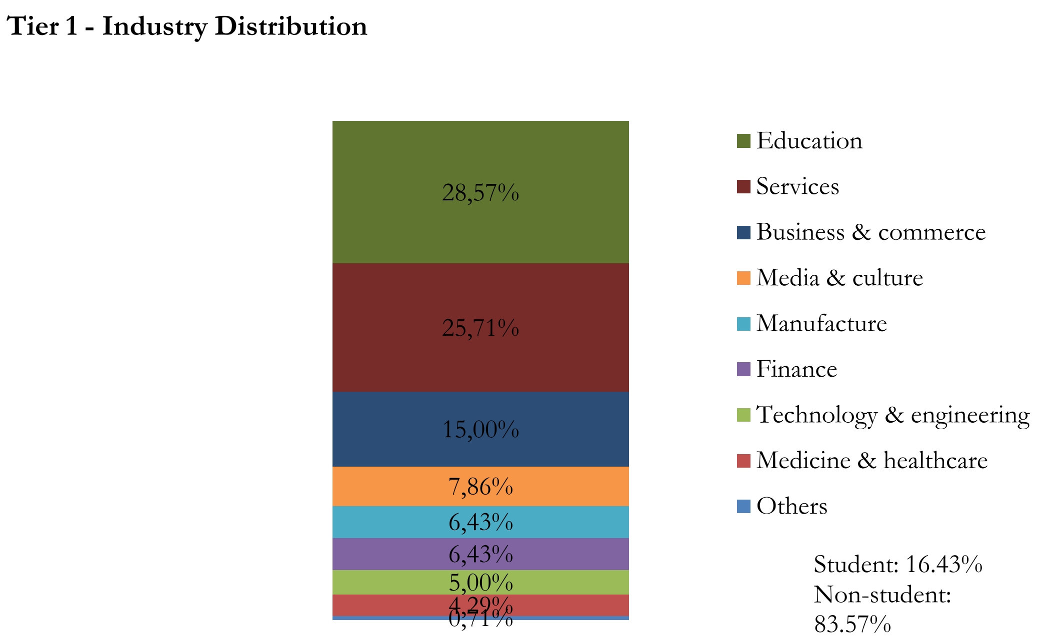

Chart 1. 1) Industry distribution of city tier 1 participants

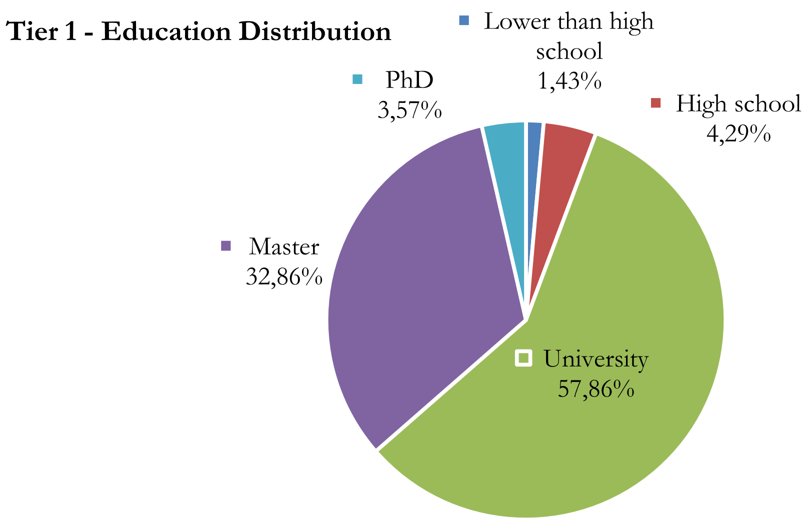

Chart 1. 2) Education distribution of city tier 1 participants

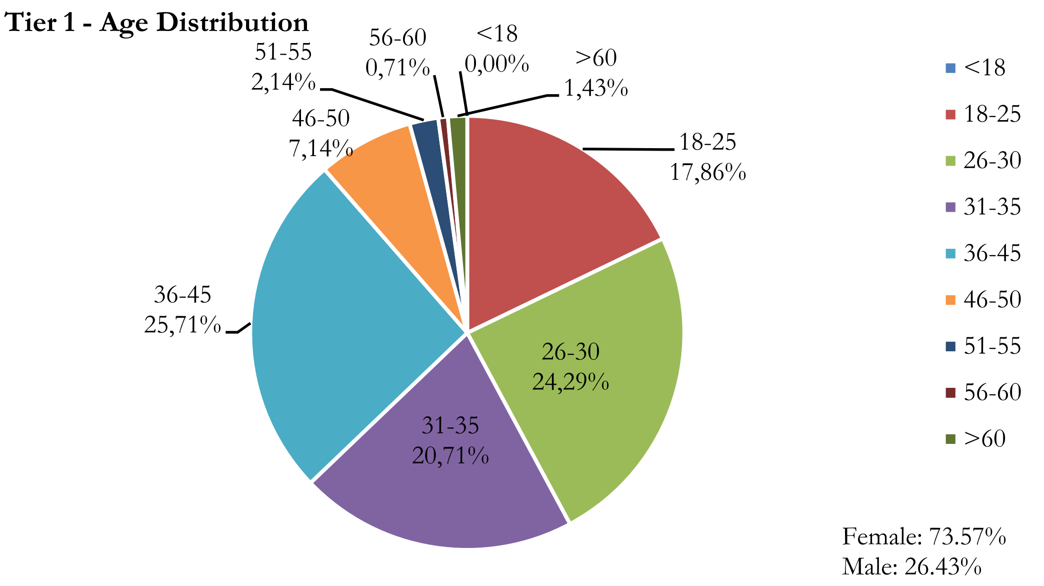

Chart 1. 3) Age distribution of city tier 1 participants

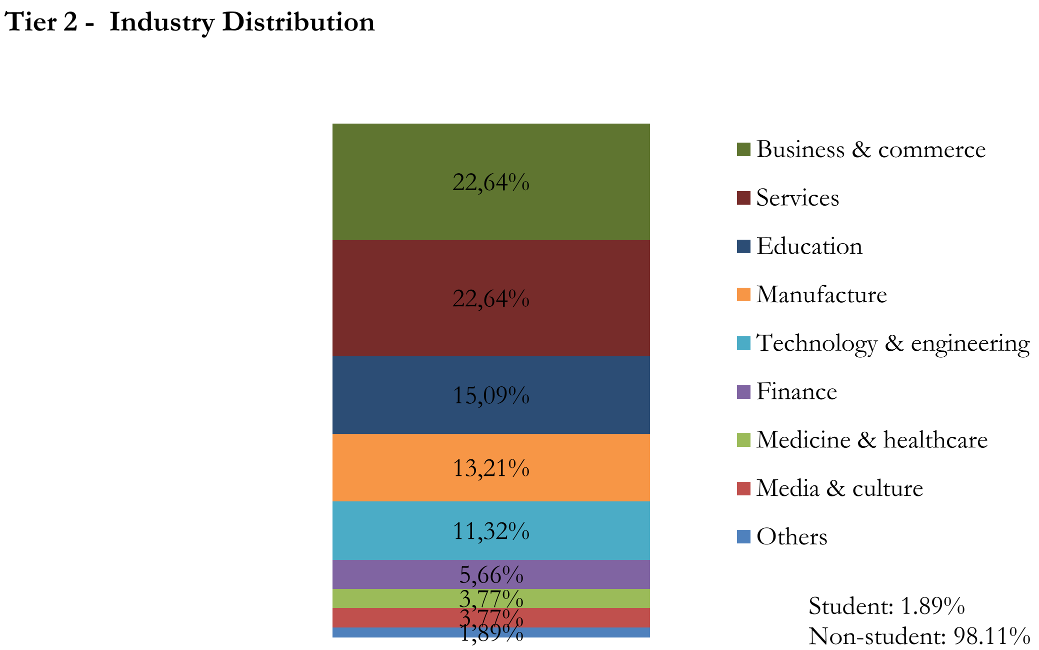

Chart 1. 4) Industry distribution of city tier 2 participants

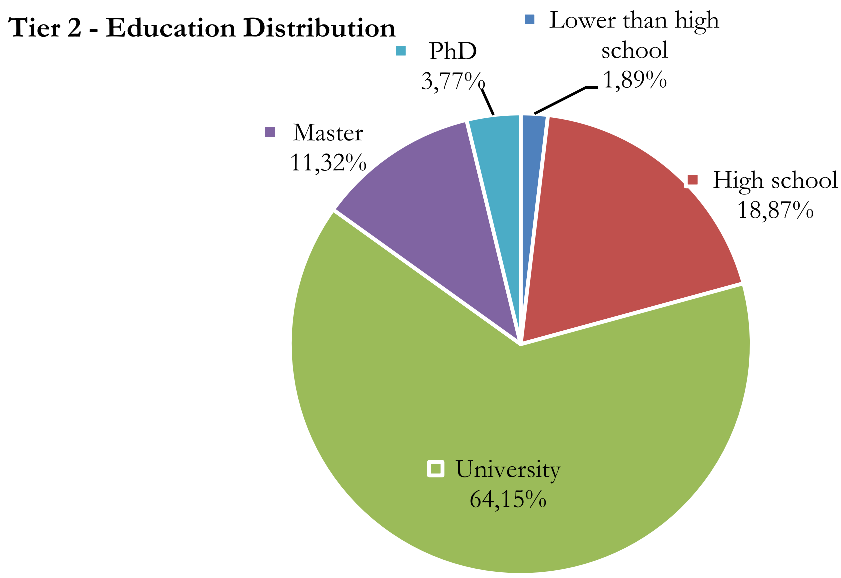

Chart 1. 5) Education distribution of city tier 2 participants

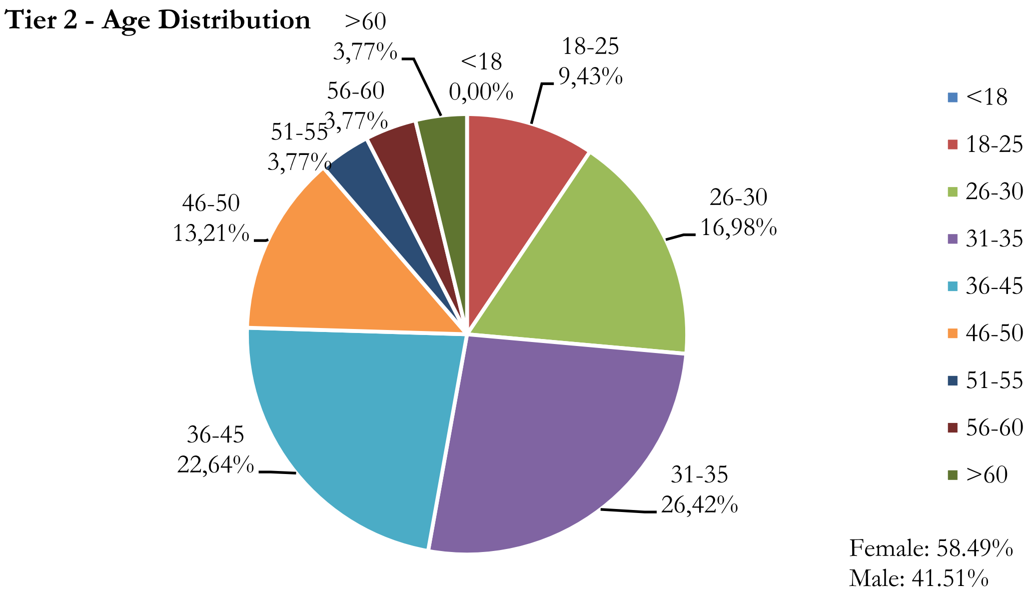

Chart 1. 6) Age distribution of city tier 2 participants

Tier 3 - Industry Distribution

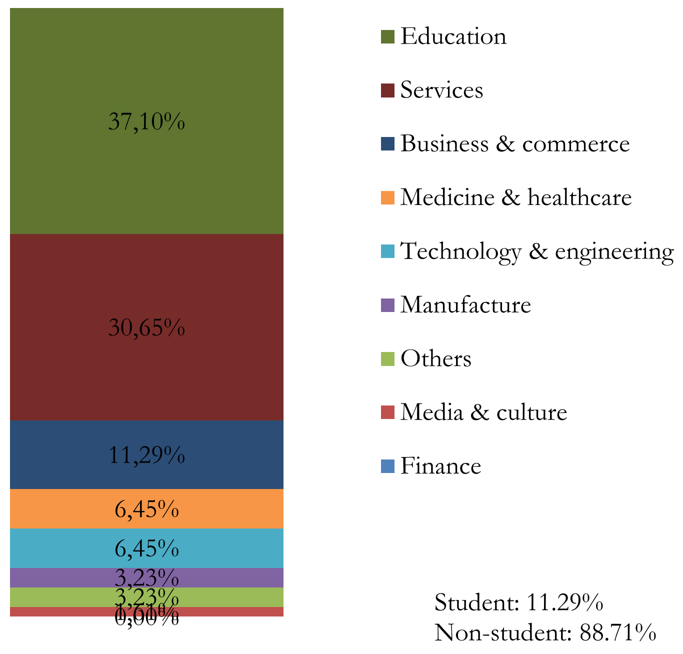

Chart 1. 7) Industry distribution of city tier 3 participants

Tier 3 - Education Distribution

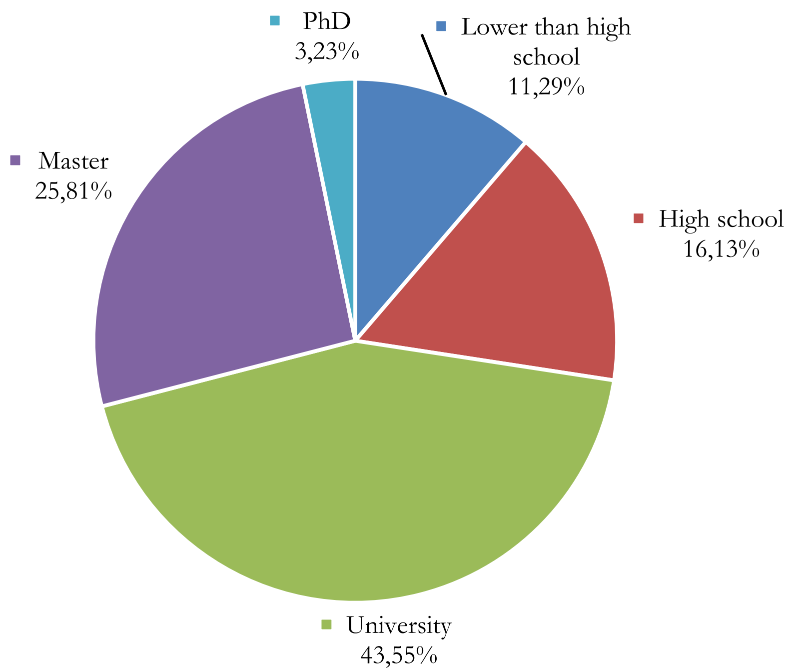

Chart 1. 8) Education distribution of city tier 3 participants

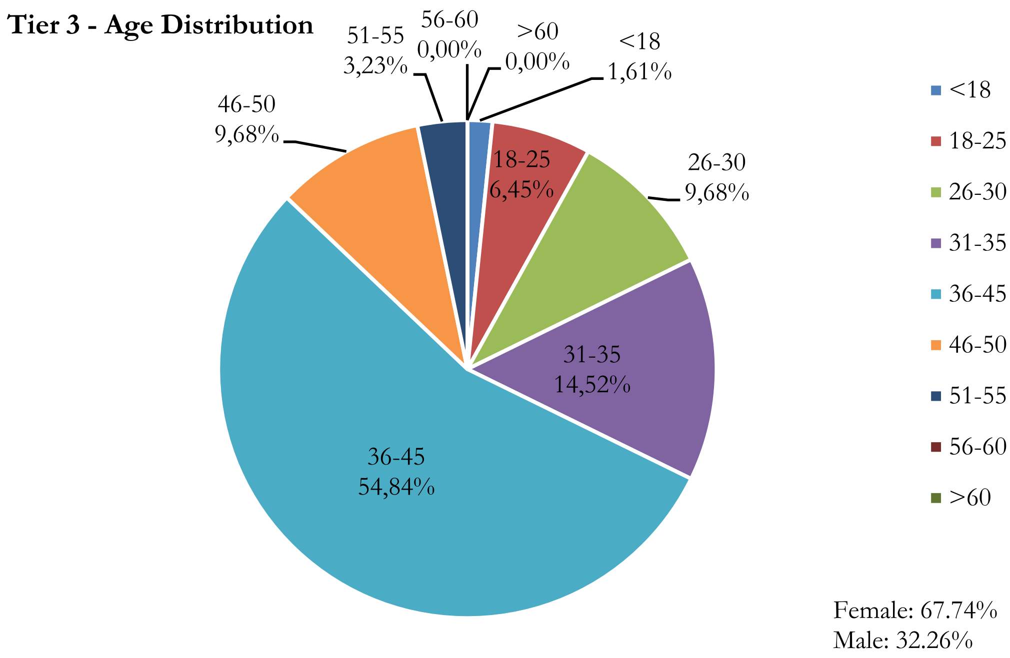

Chart 1. 9) Age distribution of city tier 3 participants

2. The participants' consumption tendency towards cultural products, consumption frequency and purchasing power

When the participants were asked if they liked visiting on-site cultural venues, 79.61% of them reported interest or extreme interest. On a 1 to 4 scale (4-extremely like), the average score was 3.10. The details of the participants' score distribution are shown in Table 2 and Chart 2. The respondents' main purposes of such consumption activity yare to relax (78.82%), to cultivate artistic sentiments (63.14%), to have a good time with friends (51.37%) and to learn (49.80%). However, the on-site visit frequency shows that only 25.63% of the respondents are frequent consumers (visiting cultural sites at least once per month). The consumption frequency is shown in Table 3. Factors that encourage the respondents' positive decision-making and consumption are various, but an interest in programs remarkably stands first. The majority of those respondents who had consumed on-site cultural products in the past year said that they had decided to go because the program suited their interests. The major factors influencing the consumption frequency and decision-making are: time ("there was no appropriate time for visiting" at 46.70%), companions ("it is hard to find the right companions to go with" at 36.10%) and price ("concerns about expensive price" 24.70%). The purchasing power for theatre shows and music concerts was calculated from the participants' price input, which is displayed in Table 4*(note: tier 2 student's purchasing power was not calculated due to a small number of student participants)*.

City Tier	Don’t like at all — 1	Neither — 2	Like — 3	Extremely like — 4	Total
Tier 1- Avg 3.10	6	23	62	49	140
Tier 2- Avg 3.04	4	6	27	16	53
Tier 3- Avg 3.16	4	9	22	27	62
Total	14	38	111	92	255
Total - Avg 3.10	5,49%	14,90%	43,53%	36,08%	100%

Table 2. Participants’ score distribution of interest in on-site cultural products (overall and breakdown)

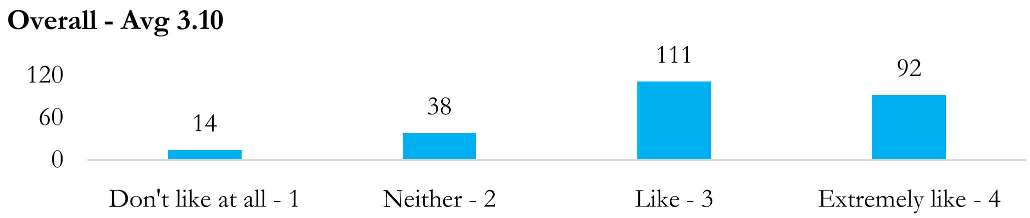

Chart 2. Participants’ interest score distribution

City tier	At least once per month	Bimonthly	Quarterly	Annually	Dependent on specific occasions
Tier 1	23,88%	9,70%	31,34%	23,88%	11,19%
Tier 2	30,61%	10,20%	18,37%	26,53%	14,29%
Tier 3	22,41%	18,97%	31,03%	20,69%	6,90%

Table 3. Participants’ consumption frequency of on-site cultural products

City tier	Consumption group	Theatre (¥)	Music concert (¥)	Percentage of participants who don’t care about price
Tier 1	student	136-244	145-267	
	non-student	146-239	166-275	Theatre: 11.02%; Music concert: 15.25%
Tier 2	student			
	non-student	126-192	140-222	Theatre: 11.54%; Music concert: 11.54%
Tier 3	student	108-172	120-188	
	non-student	108-188	123-214	Theatre: 1.82%; Music concert: 1.82%

Table 4. Participants’ average purchasing power for on-site cultural products (Chinese Yuan ¥)

3. The participants’ consumption and preferences for foreign cultural products

72.94% of the participants said that they watched foreign cultural and artistic programs (on TV, or via the phone and other electronic gadgets), 57.65% listened to foreign music on the phone, and 66.27% read foreign literary works (e.g., fiction, poems, essays, biographies, plays, art books, etc.). As for the content, the respondents hada rather broad range of choices and preferences for products in a full spectrum of topics, which manifested these consumers' diversified interests and demands. However, the statistics on the country of origin (COO) of the preferred programs and music show that they are mainly from America, Western Europe, Japan and South Korea. The other regions are only marginally represented. The COO statistics and rankings of foreign programs and music shows are shown in Table 5.

Country-of-origin (TV programs)	Percentage	Country-of-origin (Music)	Percentage
America	88,46%	America	83,67%
Western European countries	38,46%	Europe	78,91%
Japan	32,69%	Japan	33,33%
South Korea	30,77%	South Korea	23,81%
India	14,42%	Others	2,72%
Southeast Asia	5,77%	Total respondents: 147	
Central and Eastern European countries	2,88%		
Others	0,96%		
Total respondents: 104			

Table 5. Country-of-origin of foreign cultural products which the participants usually consume

4. The participants' understanding of Poland and Polish cultural products and the preconditions for consumption

On a 1-4 scale measuring the participants' knowledge of Poland, 76.86% of the participants frankly graded their knowledge level at 1 ("don't know at all"), and the average score of all participants stood at 1.27 (shown in Table 6 and Chart 3). Among the 130 respondents who read foreign literature, only 15 said they had read some literary works by Polish authors. Regarding the reason why Polish literary works are rarely chosen by the respondents, the survey answers show that "having little knowledge about Polish writers and famous Polish literary works" is the main reason (67.25%), although "concerns about the language barrier" and "the unavailability of translations" are also factors that cannot be belittled (22.22%). As for the willingness of choosing Polish cultural programs to watch (either on TV or via the Internet), 66.67% of the participants remain conservative whereas 33.33% hold a rather open attitude. They are willing to explore such options either out of their own interest or upon recommendation by others, and some even have a plan of travelling to Poland in the future. The demographic analysis of these positive respondents shows that most of them are university graduates and degree holders, and that students and teachers account for 25.88%. When the participants were asked about what conditions under which they would consider consuming on-site Polish cultural products/programs on China's market, they cited five conditions far more frequently than any other ones. These five most significant conditions are related to "the program's quality and interest-arousing," "ticket price," "companions" and "popularity and the high recommendation rate" as well as "without a language barrier."The major conditions for consuming Polish cultural programs on TV or via the Internet do not differ much, except that the price concern is replaced by the expectation of free and available access to such programs. The preconditions standing at above 25% are listed in Table 7.

City Tier	Don't know at all — 1	Know a little — 2	Familiar — 3	Very familiar — 4	Total
Tier 1 - Avg 1.23	111	27	1	1	140
Tier 2 - Avg 1.30	40	10	3		53
Tier 3 - Avg 1.32	45	14	3		62
Total	196	51	7	1	255
Total-Avg 1.27	76,86%	20,00%	2,75%	0,39%	100%

Table 6. Participants' score distribution of understanding about Poland (overall and breakdown)

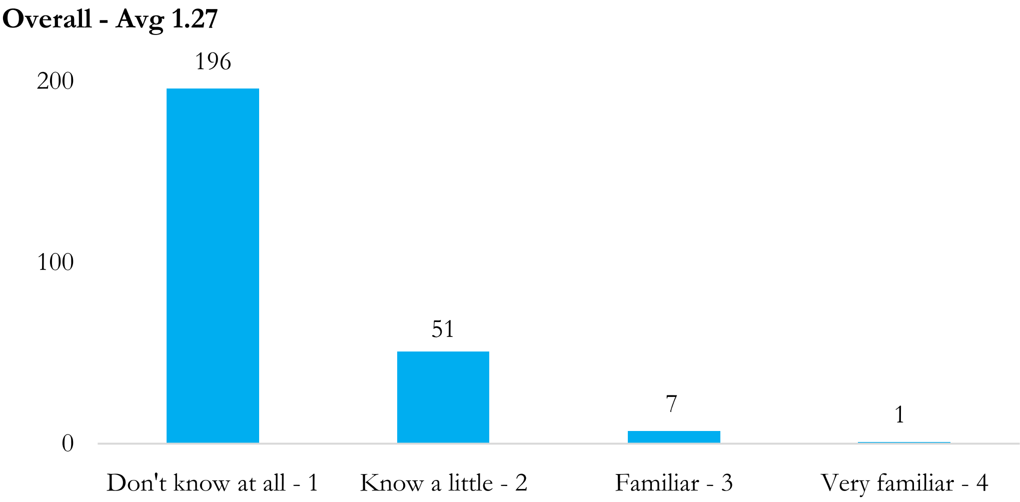

Chart 3. Participants' understanding score distribution

Conditions for watching Polish cultural programs	Number of respondents	Percentage	Conditions for visiting on-site Polish cultural programs	Number of respondents	Percentage
Interesting and well-known programs (i.e., high rate of favourable online reviews)	132	51,76%	Program suits my taste	149	58,43%
Don't have to pay	97	38,04%	Ticket is affordable	114	44,71%
Source is accessible	92	36,08%	Have right companions to go	91	35,69%

Conditions for watching Polish cultural programs	Number of respondents	Percentage	Conditions for visiting on-site Polish cultural programs	Number of respondents	Percentage
Recommended by others	82	32,16%	Programs which are famous and have a high recommendation rate on the Internet	90	35,29%
No language barrier	76	29,80%	No language barrier	73	28,63%

Table 7. Participants' preconditions for the consumption of Polish cultural products

DISCUSSIONS AND IMPLICATIONS

This section presents insights about the participants as inferred from the survey data and the initial analysis, and further delves into and discusses the implications of the data on consumer choices.

1. MOST PARTICIPANTS HAVE AN INTEREST IN CONSUMING CULTURAL PRODUCTS, BUT THE ACTIVE LEVEL OF CONSUMPTION IS RESTRAINED BY PRACTICAL FACTORS

The participants' considerable demand and propensity for cultural products are indicated by the average score of 3.10 on the 1-4 scale. This finding is also substantiated by the rankings of reading materials and TV programs that participants usually consume (shown in Table 8). The survey answers reveal that the participants' interest in cultural products is mainly triggered by their purpose of nurturing their cultural and aesthetic awareness, expanding their knowledge as well as relaxing and socializing with friends. However, willingness and interest are not equivalent to action. The frequency of visits to cultural sites shows that the majority are rather inactive visitors. The pursuit of individual interests clashes with a harsh reality: such factors as "limited time, no right companions and expensive price" implicitly reflect the influence of the rapid economic speed and Chinese cultural and social values on consumers' thinking and behavior.

Reading materials	Number of respondents	Percentage	Programs for watching	Number of respondents	Percentage
Literature (fiction, poetry, essays, biographies, plays, art books, etc.)	158	61,96%	Movies	176	69,02%
Philosophical, psychological and inspirational books	89	34,90%	News & Events	160	62,75%
Life, dining & cooking related	85	33,33%	TV series	118	46,27%
News & events	72	28,24%	Education, discovery and documentaries	118	46,27%

Reading materials	Number of respondents	Percentage	Programs for watching	Number of respondents	Percentage
Religious writings & works	57	22,35%	Entertainment programs (singing contests, talent shows, talk shows, etc.)	115	45,10%
Learning-aid & study materials	50	19,61%	Broadcasts of concerts, operas, theatre and art shows	65	25,49%
Medicine & healthcare related	38	14,90%	Sports	56	21,96%
Economics & management	37	14,51%	Interview programs	56	21,96%
Science & technology related	35	13,73%	Economics & finance	35	13,73%
Children's books	34	13,33%	Religion related	22	8,63%
Others	6	2,35%	Others	3	1,18%

Table 8. Reading materials and TV programs participants usually consume

China's urbanization process drives the expansion of cities. Big cities such as Shanghai and Beijing have grown into super megacities with huge populations and vast sizes. Although infrastructure facilities are upgraded and continue to advance, daily commuting between workplace and home is long, unavoidable and exhausting for the residents of these super megacities. Reports show that the average one-way journey time between home and workplace is 97 minutes in Beijing, and almost 90 minutes in Shanghai.[18] The fast pace of life, heavy work pressure and intense competition, combined with massive commuting time, make it impossible for many megacity residents to pursue their personal interests and hobbies. Being busy is a standard state, while having spare time for cultural experiences is becoming luxury.

The "companion requirement" is more related to social and cultural influences, even though it is generally believed that China's social and economic transformations and opening-up in recent decades have transformed people's way of thinking. The increase of freedoms has encouraged the Chinese to embrace values of individualism, prioritizing individual needs, aspirations and satisfaction, and to assume more independence in every aspect of life. Nonetheless, for value-laden cultural products, the Chinese are prone to prefer collective pleasure and happiness to individual enjoyment. This is vividly described in the second section of King Hui of Liang in the Chinese classic Mencius.* As the teachings of the revered philosophical school of Confucian-

* 《孟子·梁惠王下》曰："独乐乐，与人乐乐，孰乐乎？"曰："不若与人。"曰："与少乐乐，与众乐乐，孰乐？"曰："不若与众"。Mencius asked the King of Qi which could make one happier, listening to music alone or with others? The king answered that it was more pleasurable to enjoy it together with others. The King was

ism are deeply entrenched in Chinese society, many contemporary Chinese people regard cultural products as instruments for enhancing relationships.

As for the price, the data analysis shows that the purchasing power differs bycity tier and between student and non-student participants. If the consumption frequency is taken into consideration, it is clear that the average amount of money the participant spends on on-site cultural products is quite small as compared with the per capita disposable income and the per capita consumption expenditure of the relevant city tier. For example, the 2016 statistics for Shanghai show that 33.16% of the urban resident's annual spending goes to housing due to exorbitant and still increasing home prices and rents, while the money set aside for education, culture and entertainment in total only accounts for 11.38% of the urban resident's per capita consumption expenditure (2017 and 2018 data were not available at the time of this analysis).[19] Tier 1 urban residents' spending on housing has surpassed any other expenditure and topped the consumption structure. As opposed to tier 1 cities, urban residents living in tier 2, lower tier and inland cities tend to have more disposable income on their hands, as less disposable income is tied up in expensive property. Currently, there are clear signs that expenditure on self-development and related areas is increasing in less-developed provinces and cities. Scholars and market analysts believe that China is and will be experiencing a long-term trend of consumption structure upgrade and that expenditure will be more focused on education, medicine and healthcare, culture and entertainment. The cities of tier 3 and lower levels still have a considerable consumption potential and opportunities to exploit.[20] This finding is also substantiated by the survey results showing that tier 2 and 3 cities have a higher percentage of frequent consumers than tier 1 although the average purchasing power of the former is currently lower than that of the tier 1 participants.

The participants' concern with price also indirectly implies the Chinese traditional habit of saving and eagerness to save. Although the Chinese saving rate has been declining since 2010, the current household saving rate still stands at around 35% due to people's concern about the present weak social welfare infrastructure and required substantial down payments (typically 30–40%, in some major cities as high as 50%) and home prices that Chinese homebuyers are facing. Expenditure in other areas is accordingly cut down.[21] The price concern also reflects the price market of cultural products, such as music concerts and theatre shows. High admission and ticket prices shut the door to many; the affluent upper middle class and the wealthy minority are more likely to be very frequent target audiences and visitors. China's 2017 Gini Coefficient surged over 0.4 and was reported at 0.4670 in the national statistics.[22] Economic growth has not

then asked which was more pleasurable, to share it with just a few people or with a larger audience. The King said that if there were a larger audience the atmosphere would be all the more enjoyable.

benefited all segments of the population equally. Gross income disparities and high prices make the middle and lower-middle classes more often than not consider consuming cultural product, such as concerts, theatre productions and opera shows, to be luxury that can only be enjoyed once per year, or once per season as a reward for toiling work, or as a way of celebrating special occasions.

Facing the complex dilemma woven from personal interests, time constraints, right companions and expensive prices, the mass middle class, especially the growing and young middle class, turn to reading, self-learning, mobile socializing and consuming all sorts of cultural, artistic and entertaining programs and games via new media apps on the Internet. Consumption via new media channels is becoming increasingly popular not only because it helps consumers fulfill their personal demand for intellectual, cultural and spiritual development and entertain those worn out by exhausting commute and stressful work, but also because it is more economical and handy, without limits on access and time. After all, no high cost is incurred and consumers can enjoy it anytime, anywhere and alone, typically during the daily commute.

Diversified media portals and platforms such as micro blogs, We Chat, client apps, browser apps, live video and VR media platforms have appeared and many more are mushrooming in China.[23] They enable Chinese netizens (the population of mobile phone netizens was 656 million as of June 2016) to access a variety of resources through smartphones, helping them socialize in virtual communities, relieve stress via emotional care-oriented programs and relaxing games, and obtain psychological guidance, spiritual support and personal development through books, courses, talks, movies, music, programs and others.

This consumption trend is amply substantiated by the survey data. As many as 81.18% of the participants spend more than 60 minutes per day on the phone (50.59% more than 120 minutes).The phone-mediated activities (shopping excluded) involve socializing, amusement and entertainment, checking information, working and learning. Massive consumption on the Internet is certainly attributable to technological advancement, the vigorous development of the new media industry and the rapid rise of related services, such as advertising, marketing, etc. Nevertheless, the emergence and expansion of consumption via new media and other consumption forms, such as shared consumptions, are to a great extent due to a gap or a divergence between the increasing consumer demand and the practical limits encountered in reality (e.g., time, prices, etc.).

2. Most participants welcome and consume foreign cultural products

The survey figures demonstrate Chinese consumers' openness towards foreign cultures, current consumption propensities and the major COOs of cultural products. Behind these market phenomena are historical, social and economic root causes intermingled with educational and linguistic factors.

From a cross-cultural perspective, openness is a useful personality construct in Chinese culture. It has its own expressions and its own indigenous characteristics, which cannot be simply measured by means of theories and factors commonly applied in Western culture.[24] Chinese consumers' openness towards foreign cultures and their sophisticated ability to select, learn, internalize, balance and harmonize with other cultures have a long history and are actually a remarkable Chinese national trait. In an era marked with globalization and resource diversity, the emerging social classes are expressing a growing demand for foreign products and opening up to foreign influences, which are neither accepted with prejudice nor viewed passively.[25]

China's strong economic ties with the United States of America, the popularity and prevalence of American culture, the successful marketing of American brands, the ever-advancing technology and fancy products of the Silicon Valley, all make American cultural influences affect China and Chinese consumers deeper than ever. Needless to say, the country-of-origin information significantly influences Chinese consumers' evaluation of products from the country and their consumption behaviors.[26] American TV programs, films and music are widely and avidly consumed by the Chinese of different ages and backgrounds. This is clearly confirmed by the survey data from this study.

Another factor that catalyzes this consumption propensity is the English language whose impact should not be underestimated in any way. English is currently the first foreign language in China, and while English language instruction is mandatory for children from primary school on, in reality it often starts already in kindergarten. In most Chinese provinces and municipalities, English is one of the major subjects students must take at the College Entrance Examination (Gaokao). At most colleges and universities, passing the College English Tests is one of the academic requirements for obtaining academic degrees. Due to these mandatory tests and examinations during a student's career, English language learning has for quite a while been among young people's educational priorities. The economic opening-up attracts foreign investment, as a result of which a great many international organizations and enterprises settle down and run their businesses in China. Chinese employees associated with these multinational institutions and those seeking job opportunities continue to learn and improve their English language skills so as to freely communicate at work and better compete against and outdo others on the job market. To fulfill this learning demand economically, efficiently, practically and in an entertaining manner, students and non-students usually learn the language and communication skills via watching English language movies, TV programs, talks and soap operas. Consuming these cultural products does not differ much from taking extra-curricular language courses, which are usually seasoned with entertainment and cultural values. Unsurprisingly, this study's survey data show that 68.82% of the respondents acknowledge that one of their purposes in consuming foreign cultural products is to learn language and culture. The linguistic pursuit combined with the intake of foreign cultural values reshapes consumers' cognitive systems, multi-dimensional consumption needs and experiences as well as the dynamic upgrade of consumption structure. As linguists, anthropologists and other scholars have argued and acknowledged, language irrefutably plays a role in shaping people's thoughts, modifying their perception and creating their reality.[27] Language communicates culture and also creates culture. The survey carried out within this study also proves that linguistic change not only reflects the evolution of culture but also is responsible for cultural change and diversity.[28] Language indeed is an important intermediary in facilitating smooth cultural communication and a vital catalyst for promoting the consumption of cultural products.

3. The participants' understanding of Poland and Polish culture is very limited; yet some of them still hold an open attitude towards Polish cultural products

The statistics of the first survey show that more than two thirds of the participants frankly estimate their level of knowledge about Poland and Polish culture to be at the lowest point on a 1-4 scale, acknowledging that they have little understanding of the country. Their limited knowledge about Poland and Polish culture is likely caused by four factors.

4. Limited information on traditional and new media in the Chinese language

Traditional Chinese media, such as TV, radio, print materials, off-sight signs, as well as various new media channels and advertisements, only provide limited information, programs, and visual and audio resources related to Poland and Polish material and non-material products in the Chinese language. Although there are official websites offering the related information in Chinese, they are neither regularly updated nor dynamically restructured to keep up with time and changes. A study conducted by Polish researchers from the Jagiellonian University in Kraków has found that the surveyed Chinese tourists to Kraków had limited knowledge about Poland. In addition to the language barrier, the insufficiency of information in Chinese, both on Chinese websites and in traditional media, is seen as another obstacle that makes Chinese tourists' independent travel to Poland difficult or impossible.[29] Importantly, Polish literary works and publications are also a weak presence on China's imported book market. Except for some historical volumes and capacious academic-oriented books, translated literature and fiction by Polish authors can rarely be found in online bookstores or on e-commerce platforms that sell imported books, although Poland boasts many world-renowned poets and writers, including Nobel Prize Winners in Literature.

5. The language barrier

The Jagiellonian University's researchers concluded that the main problem that Chinese tourists encountered was the language barrier both online and on sites. The present study has also found that one of the main reasons why the participants were reluctant to choose and consume Polish cultural products was their concern with the language barrier. Currently, across China only four universities offer a Polish language major, one of which is Sichuan University. In response to the "Belt and Road" Initiative and the "16+1" strategy, Sichuan University established a collaboration with the University of Warsaw and opened a Polish language degree program (oriented toward Economics and International Relations) in September 2017. At present, the number of students enrolled in Polish language degree programs across the country is rather small, as are the related job opportunities.

6. The weak network marketing and low advertising exposure rate of Polish products

For cultural products, although high-profile cultural and musical events are held in Chinese major cities every year, advertising before and after the event does not attract enough attention from the mass public. In the second survey, the participants were asked if they had ever seen any Polish artists promoting Polish culture in China through their works (e.g., fine arts, performance, sculpture, photographs, posters, etc.),which 80.33% of the participants answered in the negative. As the unique superiority of Polish theatre, opera and contemporary dance is not communicated to most Chinese consumers, the excellence of Polish cultural programs remains unknown to many, as explained by the Director of the Tianjin Grand Theatre Mr. Qian Cheng when interviewed by The Adam Mickiewicz Institute.[30] New media seems not to be leveraged in advertising and promotion. Online ads, reviews and articles about Poland and Polish cultural products with high hits and multiple comments are rarely found in China social networks in the current digital era, as observed by some survey participants. Regarding the advertising of material products, 84.02% of the participants claimed that they had never noticed any advertisements or promotional campaigns. Although there was radio advertising reported by the positive respondents, the penetration rate and effectiveness of advertising in both traditional and new media, is too low to attract attention from the public.

7. A WEAK PRESENCE OF POLISH BRANDS AND THE LACK OF SOCIAL AND DIGITAL CONSUMER ENGAGEMENT STRATEGY

Industrial and food products are currently the main Polish goods imported to China. Food, as the cornerstone of human existence, is essentially connected to people's everyday lives. The consumption of food is a cultural experience and also an initial means of getting in touch with different cultures.[31] Food facilitates communication through which people come to understand their own and others' culture, habits and traditions.[32] Despite their superior quality, Polish food products are still less known to mass Chinese consumers than foods from other countries and regions. Famous Polish brands are not actively present or highlighted in traditional media, on popular e-commence platforms, in social networks as well as in life circle media, such as metro ads, elevator and cinema ads. The second survey statistics show that among 244 participants, 79.51% said that they had never purchased any Polish products in China. As for the categories that buyers consume, food ranks the first, followed by beverages, whereas the other categories are very marginalized. In China, good "word-of-mouth," on-line reviews and comments by other fellow shoppers and social recommendations have a powerful say in winning consumers' attention and swaying their choice.[33] In the first survey, the participants' limited knowledge about Poland indirectly reveals the ineffective branding and weak "word-of-mouth" marketing of Polish products as well as the inactive consumer engagement with them on China's market.

RECOMMENDATIONS

Presently, China's market is undergoing a continuous consumption increase, consumption structure upgrade and digitalization. In the first three quarters of 2018, consumption contributed to 78% of the country's economic growth.[34] Market studies and consumer insights indicate that more and more consumers pursue quality life and healthier lifestyle, demand quality, value and consumption convenience, and crave new experiences. E-commerce platforms, which offer consumers convenient online comparisons of prices and products, fast delivery services (due to traffic avoidance) and a wide range of choices, are becoming an important bridge between foreign products and Chinese mass consumers. The share of products imported online is considerably higher than that in traditional off-line channels. In addition to quality and convenience, consumption experiences are being given more and more attention. Increased outbound travelling also enables Chinese consumers to know more about foreign products from more countries, which consequently diversifies their choices of countries of imported products. [35]

Poland's active participation in the 2018 Shanghai CIIE (China International Import Expo) implies that the Polish government and enterprises are determined to build a balanced trade between Poland and China through promoting exports and expanding categories of products sold to China in order to raise Chinese consumers' awareness of and draw their attention to the superior quality of Polish goods and services, highlight to them the excellence of Polish cultural products, encourage them to consume and more importantly increase their recognition and overall good impression of Poland and Polish culture.[36]

Although two thirds of the participants in the first survey were reluctant to choose and watch Polish cultural programs, 33.33% of them held a rather open attitude and said they would like to have a try. This reveals that even in the current context there are business opportunities, but to seize and capitalize on them some effort is needed.

1. Providing adequate and effective information resources in Chinese and promoting their transmission via traditional and new media

The results of the second survey show that there are some promotion materials in which the participants are more interested and which they consider particularly helpful in improving knowledge about Poland and Polish culture. These materials include travel-themed video programs (56.56%) and documentaries(50.00%) that fully and vividly introduce Poland and its culture in the Chinese language and are not only broadcast in the mainstream traditional Chinese media, but also circulated in new media and social networks. Movies (46.72%), videos about Polish culture and people' lives (38.52%), food fairs (35.25%)and tourist guidebooks (30.74%) in Chinese are also more highly valued and expected by the survey participants than other resources. Currently, there is a strong demand for travelling among Chinese people, and they pay more attention to the combination of travelling with culture, innovation and technology, in addition to improved quality and performance.[37] Attractive and updated tourist information (both online and printed, in China and Poland) could be worded interestingly and embellished with illustrations. Such resources could not only include stories and introductions about Polish historical and cultural sites, Polish customs and culture, world-renowned Poles, famous Polish brands and popular cultural products, but also contain useful tips about transportation, shopping, dining, ticket purchasing and sight-seeing. Such information and clues could stir Chinese people's interest in Poland, educate and better prepare potential Chinese outbound travellers to Poland and make things easier to those who have already arrived in Poland.

The participants' preferred promotion methods are listed in Chart 4, which shows that video programs combining visual, vocal and literary art, replete with cultural and educational values and employing entertaining elements and modes are more favored by the participants than other forms, such as on-site performances or literary works. Such preferences can be well explained by the three influential factors, namely “time, companion and price,” identified in the first survey of this research. As video programs are free from cost, time and space limits, they are the most popular, economical and efficient information source. They are cultural fast food in fast modern life and in a society driven and accelerated by the rapidly growing economy.

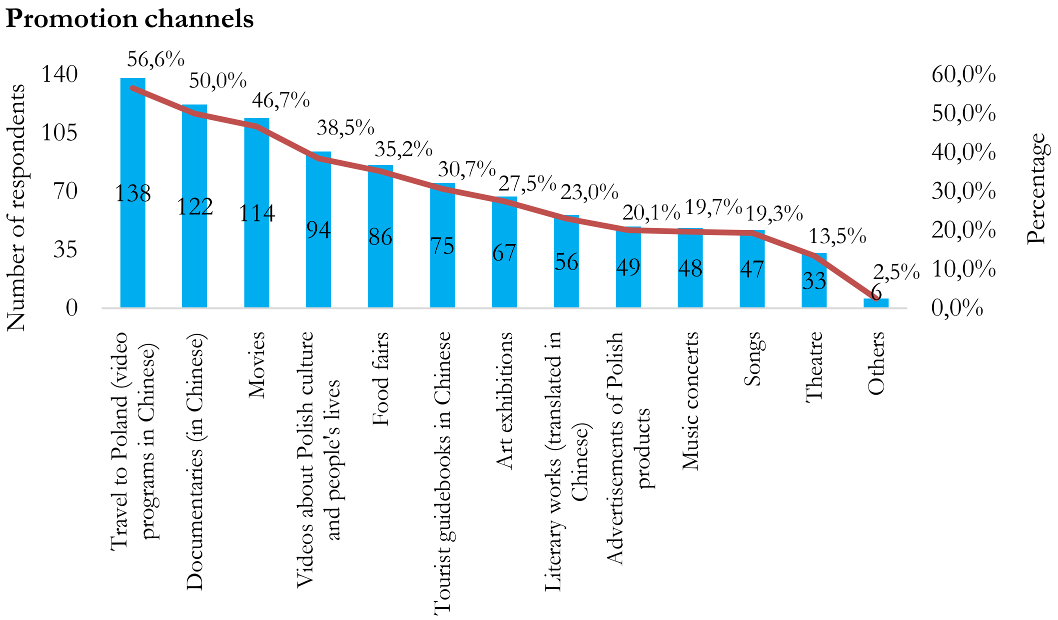

Chart 4. Ranking of participants’ preferred promotion channels

2. Improving the advertising of Polish products, expanding their media coverage and enhancing their social influence

Although cultural products (e.g., movies, music concerts, theatre and art, etc.) are not the most popular way in which the participants of the second survey choose to obtain knowledge about Poland and its culture, these cultural products actually play a critical role in cross-cultural communication as long as people’s attention and interest are triggered. The International Chopin Festival and the International Chopin Piano Competition in Poland attract plenty of attention from Chinese musicians and music learners. Polish performers, artists and representatives of the Polish culture industry have actively participated in prominent Chinese cultural events, such as the Wuzhen Theatre Festival, and amazed audiences with their world-class performances.[38] To elicit attention and thoughtful resonance not only from a handful of Chinese professionals and audiences but also from the mass public and to expand social influence, new media and social networks, mainstream media and other media, such as cinema and metro ads should be fully leveraged by Polish agencies for information update, product advertising and engagement with target audiences and consumers. Such an approach is necessitated by the digitalization of China's market, the exponential effect of new media and the high exposure rate of life circle media. In the second survey, the participants were asked what methods were likely to draw their attention to Polish cultural products."Intensive advertising on the Internet and social media networks" was the most common answer which topped the list, standing at 69.67%. It was followed by "news coverage by mainstream media" and other methods, such as "programs toured in more cities," "online comments and reviews" and "cooperation with Chinese media and relevant enterprises." Details of the participants' selections are listed in Chart 5.

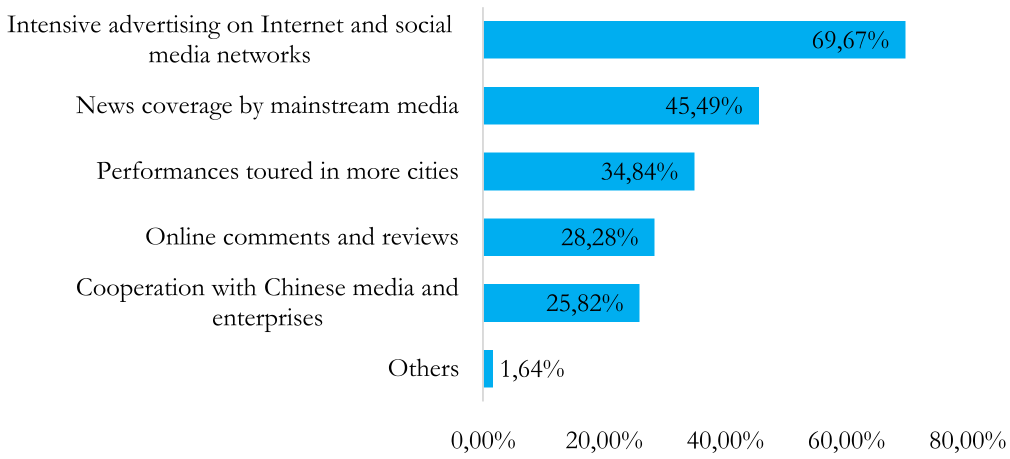

Chart 5. The methods of promoting Polish cultural products which are likely to attract the participants' attention

3. Strengthening Branding Efforts and Collaboration with E-commerce Platforms

Successful branding of foreign material products can impress people not only with the product or the service itself but also with the cultural values it carries. Digitalization is an outstanding feature of today's Chinese market. Statistics show that the number of Chinese online shoppers had reached 569 million by mid-2018. [39] Because e-commence platforms cater to vast numbers of consumers and set lower-shelf thresholds for sellers, many foreign enterprises and business owners build direct relationships with e-commence platforms so as to better understand their consumers and have an improved access to data and consumer insights. They actively use social networks, devise active social and digital consumer engagement strategies to establish their brand images in Chinese consumers' minds, declare quality and values, educate consumers and foster a loyal following. Establishing better ties with consumers makes it easy to sell products. In view of the digitalization of the Chinese market and the current massive number of online shoppers, the second survey asked the participants if promoting and selling Polish products on e-commerce platforms could help them know Poland a bit better. As many as 70.08% of the participants answered in the positive, which implies that: 1) cooperation with e-commerce platforms could help Polish business thrivein China; and 2) consumption is a very practical way of learning and expanding knowledge for the Chinese. In addition to collaborating with e-commerce platforms, successful branding, reasonable pricing strategies and active engagement with consumers, as suggested by some participants, could also help Polish brands and products extend and consolidate their presence in China and enjoy the boon that China's market offers. In the meantime, Polish cultural influence could be better delivered and expanded in China, as culture and business are side products, or precisely speaking, twin products of each other.

What's worth noting is that from the culture promotion perspective, food fairsare considered to be a potentially interesting promotion channel by 35.25% of the second-survey participants. When asked if they would like to try the Polish cuisine, a striking 92.62% of the 244 participants answered positively. This confirms the sociological and anthropological insight that food is the most-utilized means for knowing other cultures, as eating the food of other peoples seems apparently easier than decoding their languages.[40] The openness of Chinese middle-class consumers towards Polish food means that food (e.g., restaurant food) could serve as an instrumental pioneer in cross-cultural communication, in addition to its business function.

4. Strengthening the collaboration in education

Education plays a critical and irreplaceable role in preparing people to establish their abilities and attitudes (e.g., openness) towards the world, society, career, market, consumption, etc. Its role is not just limited to preparation; education is also a factor in transforming the existing values, behaviors and attitudes. Therefore, if education is not involved, no effort invested in cultural interaction is fully-fledged or truly future-oriented. In order to find if Polish cultural programs had a "market" in the Chinese education sector, the participants of the second survey were asked whether they would welcome and feel excited about Polish cultural programs launched on Chinese campuses in the assumption that they were teachers or students. Not surprisingly, 95.90% of the participants gave a positive response. Openness to education surpasses openness to food (92.62%). While eating food is an easy way to experience other cultures, the survey data indicate that people are not likely to be satisfied with and limit themselves merely to this comfortable and facile achievement; rather, engagement with academia and art is an equally or even more aspired-to approach. In this sense, collaboration in the educational sector and student exchange are indispensable and critical in cross-cultural communication and bilateral trade, which is also suggested by some survey participants. Polish universities could further explore the Chinese student market in lower tier cities. To expand social influence and win favor from the Chinese educated youth, the growing consumers and the future consumption power, Polish cultural and educational institutions should consider initiating "campus campaigns," bringing Polish cultural activities and talks to Chinese campuses. This is a forward-looking effort similar to sowing seed today for tomorrow's harvest.

Culture, education and business are organically interwoven, with no distinction in products and consumption. Country-of-origin (COO) perceptions and product usage experience jointly influence consumers' product judgments in the purchasing context. Promotional effectiveness could be maximized through establishing associations between country images and products.[41] To build a stable market for Polish products in China requires concerted efforts of cultural, business and educational sectors. In this paper, some general recommendations are initially formulated on the basis of the data from the reported surveys. Successful cases should be studied and explored in future research work in order to collect more solid and useful guidelines for the promotion of Polish material and non-material products on China's market, which is now opening ever wider to global trade and foreign products.

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