



**PwC's Voice of the Consumer 2025 Global Survey- China Report**

# The New Chinese Consumer: Food, Health, Sustainability

December 2025



Foreword	03
Retail market overview	04
The five faces of the New Chinese Consumer	09
About the survey	38
Contact us	39

# Contents



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This year marks the 16<sup>th</sup> Anniversary of PwC's Voice of the Consumer Global Survey, and I am pleased to share with you the findings of our 2025 China Report.

The 2025 consumer landscape in the Chinese Mainland and the Hong Kong SAR is a study of contrasts and convergence. While Hong Kong consumers grapple with immediate economic pressures, their Mainland counterparts are navigating a complex blend of burgeoning health consciousness, a resurgence of national pride, and a sophisticated embrace of digital innovation. This report, based on a comprehensive survey of consumers across both markets, unpacks the critical trends shaping the future of the food, health, and sustainability sectors.

To navigate this complexity, our report moves beyond broad trends to look at five distinct consumer personas. From the hyper-rational value seeker to the culturally attuned domestic brand supporter, we explore their unique motivations, behaviours, and expectations. By understanding the "day in the life" of these consumer groups, we provide a granular view that allows businesses to develop effective strategies.

In particular, when compared to their global peers, Chinese consumers place a significantly higher value on products that offer nutritional benefits, meet specific

dietary needs, and feature sustainable packaging, while also remaining receptive to quality imported goods. These preferences create a clear roadmap for brand manufacturers and retailers, highlighting precisely where to focus their innovation efforts.

For retailers, this means employing strategic category management to curate product assortments that directly reflect consumer priorities like wellness and sustainability. In a market where private brand concentration is in single-digit, this presents a golden opportunity for private labels to evolve beyond their traditional role as budget alternatives. By developing targeted private brand lines—from premium wellness ranges to convenient meal solutions—and controlling the narrative from sourcing to packaging, retailers can meet nuanced demands, build consumer trust, and establish a powerful point of differentiation in a crowded market.

Ultimately, this strategic pivot from reactive selling to proactive curation underscores a fundamental market truth: understanding the consumer is no longer a mere marketing exercise, but the central pillar of a resilient business strategy. The businesses that will lead tomorrow are those that not only listen to the voice of the consumer today but also anticipate the direction of their journey.

# Foreword



# Retail market overview

# Market duality: Navigating economic headwinds and sectoral booms

China's consumer market is a dynamic ecosystem valued at approximately RMB49 trillion in 2024, integrating both traditional and modern retail formats. The retail environment presents a dual narrative heading towards the end of 2025 and into 2026. On one hand, macroeconomic softness, employment challenges in certain sectors, and fluctuating consumer confidence are creating significant headwinds, leading to decelerating retail spending growth. This has given way to a downward consumption pattern, where shoppers are increasingly cautious and price-sensitive. This trend is validated by

recent market data showing a deceleration in fast-moving consumer goods (FMCG) growth, driven by a decline in average selling prices (ASP), even as sales volume increases.

This cautious sentiment is reshaping the retail channel landscape. According to the Kantar Worldpanel China Shopper Report 2024, offline channels have outperformed the market for the first time since the rise of e-commerce, driven by the rapid expansion of discount chains and club warehouse formats. Smaller formats like convenience stores and local grocery stores are also gaining share as consumers prioritize

proximity and value. Hypermarkets, conversely, continue their decline, while membership-based warehouse clubs like Sam's Club are seeing remarkable growth, even in lower-tier cities.

In Hong Kong, retailers are facing high operating costs and intense competition from Chinese e-commerce platforms making inroads into the city. Meanwhile, certain consumption patterns are accelerating, including the rise in the northbound travel trend of local residents and the change of inbound tourists to spend less on luxury goods and more on experiences.



On a positive note, according to our survey, Chinese respondents are willing to spend on premium and health-conscious food, preventative healthcare, wellness services, and overall personal well-being, signaling that the next decade of growth will be defined by higher-quality, needs-based consumption.

This heightened focus on personal well-being also extends into a sense of environmental responsibility. Chinese consumers are more inclined to select products with sustainable packaging and to look for sustainability certifications. Most strikingly, a substantial majority demonstrate a willingness to pay a premium for sustainable food, a conviction that stands in stark contrast to global consumers. This convergence of personal and planetary health concerns in the Chinese market signals a definitive shift where value-aligned consumption has become a growing expectation.



### Most important factors when choosing food items:

	Chinese mainland	Global
High nutritional value	34%	27%
It's organic	25%	13%
Specific dietary needs	23%	11%

Source: PwC's Voice of the Consumer 2025 Global Survey

At the same time, the “instant retail” phenomenon, has become a highly competitive space for tech giants like Alibaba, JD.com, and Meituan. Promising deliveries within 30-60 minutes, this sector reached approximately RMB780 billion in 2024 and is projected to exceed RMB2 trillion by 2030<sup>[1]</sup>. The intense competition is fundamentally reshaping consumer expectations around convenience and speed, forcing traditional retailers to integrate online-to-offline (O2O) capabilities to remain relevant.

As consumer confidence rebounds from previous lows, supported partly by targeted government incentives, Chinese consumers are investing in their physical and mental well-being. This is driving demand for everything from healthier food options to fitness technologies. The advent of new AI agents powered by DeepSeek and other advanced models are quickly creating new consumption scenarios.

Source: [1] The State Council Information Office of China, PRC

The “Guochao 2.0” or “national wave 2.0” trend—a preference for domestic brands that celebrate Chinese culture and heritage—is also fundamentally altering brand loyalty. This surge in national pride, as seen in the stellar success of the national blockbuster Na Zha 2 and the award-winning game Black Myth Wukong, is challenging the position of international brands and creating massive opportunities for local players who can authentically connect with consumer identity and emotions.



### Taken actions to reduce impact on climate change with food you buy

	Chinese mainland	Global
Preference for sustainable packaging	43%	37%
Look for sustainable certification	36%	24%
Pay more for sustainable food	63%	44%

Source: PwC’s Voice of the Consumer 2025 Global Survey

However, this shift does not signal a receded interest in foreign goods. Chinese consumers remain open to international products, especially those that offer superior quality, innovative technology, or a unique heritage. Success for international brands now requires a more sophisticated approach—one that demonstrates a genuine understanding of the local

market rather than relying solely on their country of origin.

All in all, this complex environment demands a multifaceted strategy for retailers. Success hinges on the ability to identify the new faces of Chinese consumers and address their needs better than the

competition: that includes delivering clear price-to-value propositions, integrating seamless digital and physical experiences, catering to the wellness boom, and understanding the powerful pull of cultural identities, and more.



**Do your cultural background and traditions influence the types of foods you chose**

	Chinese mainland	Global
Local culture has some influence, but frequently explore foods from other cultures into my diet	<b>26%</b>	<b>21%</b>

Source: PwC’s Voice of the Consumer 2025 Global Survey

A close-up photograph of a person's hands interacting with a silver laptop. One hand is on the keyboard, while the other holds a white pen, pointing towards the laptop screen. The background is softly blurred, showing what appears to be a window with light coming through. The overall tone is professional and focused on technology and work.

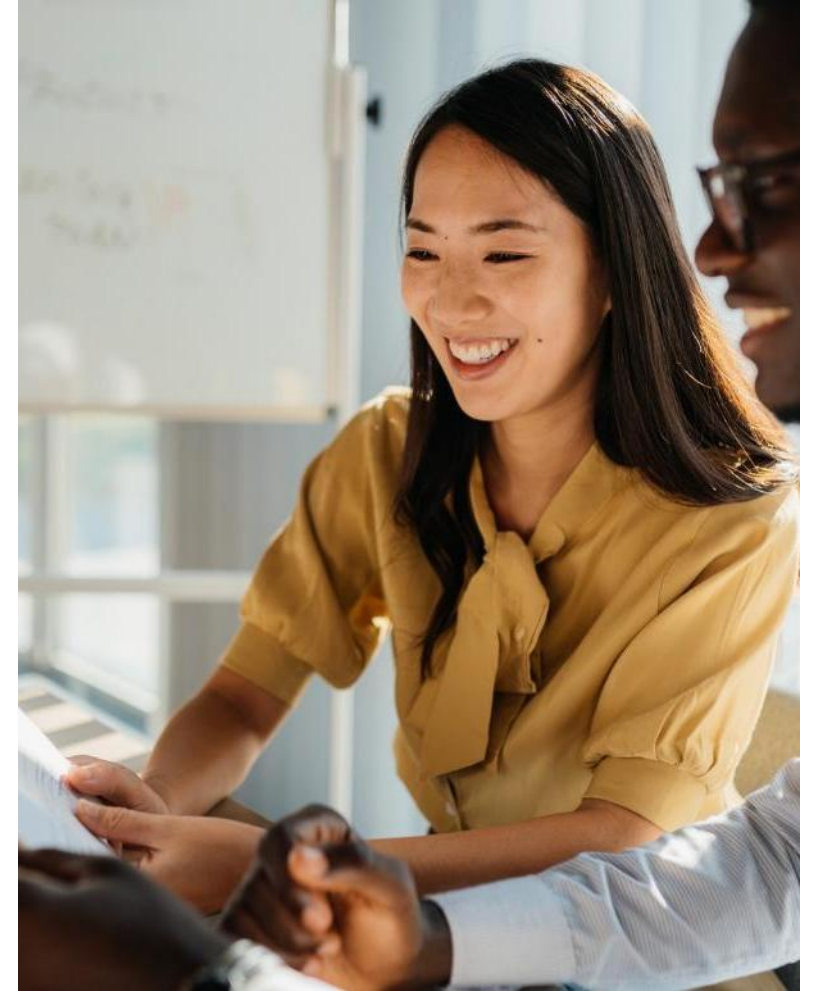
# The five faces of the New Chinese Consumer

# The value seeker: “Every Dollar Counts”

## A Day in the Life: Wendy Ng, a junior bank officer, Hong Kong

Wendy’s Tuesday morning ritual is a masterclass in modern frugality. Before her commute, she sits with her smartphone, not just checking one grocery app, but three simultaneously: HKTVMall, Pandamart, and a smaller neighborhood grocer’s app. She’s comparing the price of essentials: eggs, milk, and bok choy (or pak choy). She notes that one platform has a 15% off coupon for dairy, while another offers free delivery on orders over HKD 200. Methodically, she builds two separate shopping carts, cherry-picking deals to ensure she pays the absolute lowest price for each item. For lunch, she bypasses the expensive cafes near her office in Central, instead enjoying a home-prepped meal of rice with steamed chicken and

vegetables, using ingredients she bought from a discount retailer over the weekend. On her way home, her phone buzzes with a notification from a supermarket chain two blocks further than her usual stop—a “buy one, get one free” offer on her family’s preferred laundry detergent. Without hesitation, she alters her route. For Wendy, shopping isn’t a chore; it’s a strategic game. Winning means stretching her budget to provide for her family without compromising on core necessities, a daily reality for millions across the region.





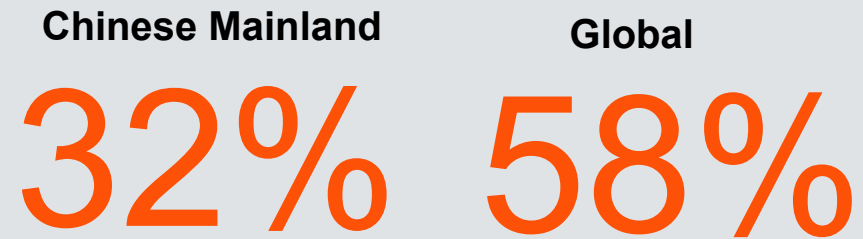
## Persona Analysis

The Value Seeker is the anchor of the modern Hong Kong consumer market, a pragmatic and rational individual whose purchasing habits are forged in the crucible of economic reality. In China, with a significant portion of households—an estimated 45%—having an annual income of less than US\$10,000 <sup>[1]</sup> in 2024, this persona’s behavior is not a fleeting trend but a structural feature of the market. Their primary motivations are shaped by concerns

over economic instability (Hong Kong : 64%, Global: 46%) and the rising cost of living (Hong Kong : 59%, Global: 58%). Their shopping is methodical, purpose-driven, and relentlessly focused on maximizing the utility of every dollar. Chinese respondents are less concerned with the cost of living (China: 32%). This may be partly explained by the flood of value-for-money products and fierce of competition between platforms.

# 45%

**of households in China have an annual income of less than US\$10,000**

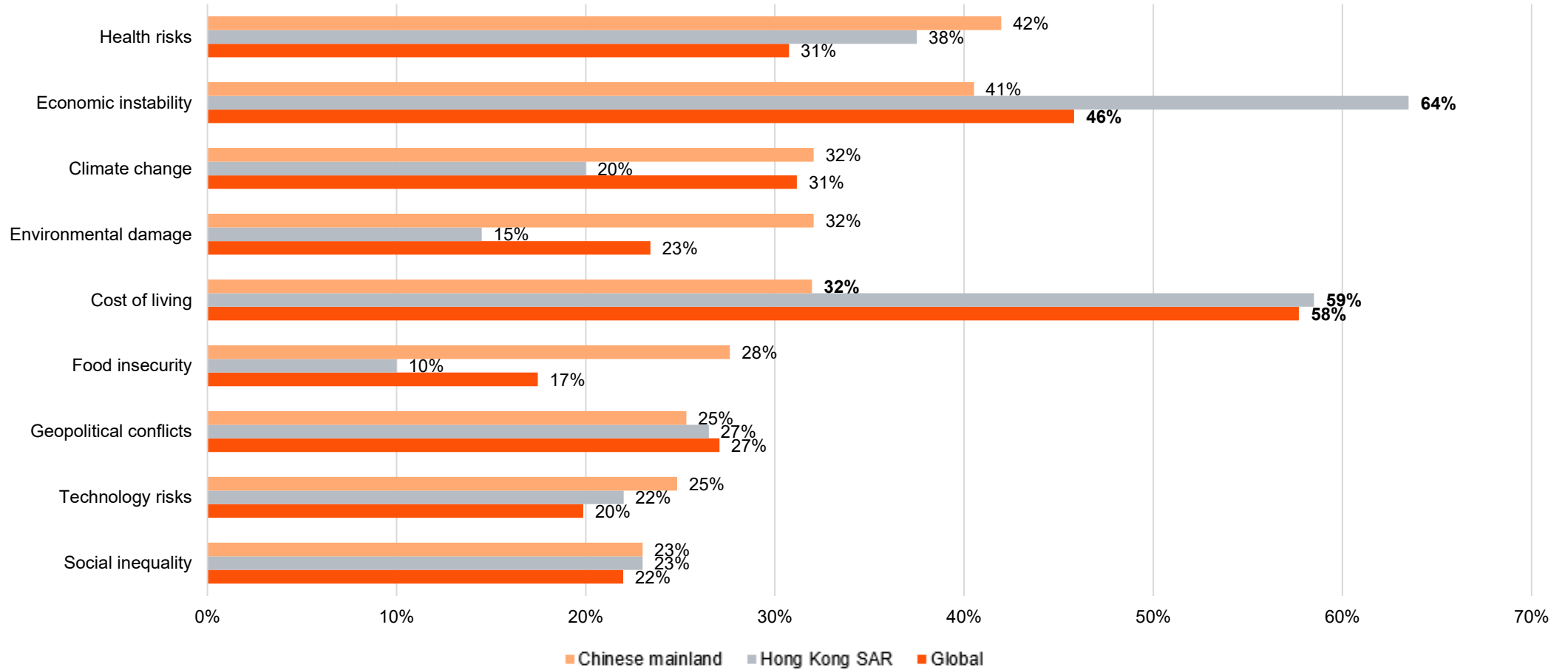


**Respondents are less concerned with the cost of living in Chinese Mainland**

Source: PwC’s Voice of the Consumer 2025 Global Survey

Source: [1] The Economist Intelligence Unit, PwC analysis, Hang Yan Chain Store Education Foundation Ltd analysis

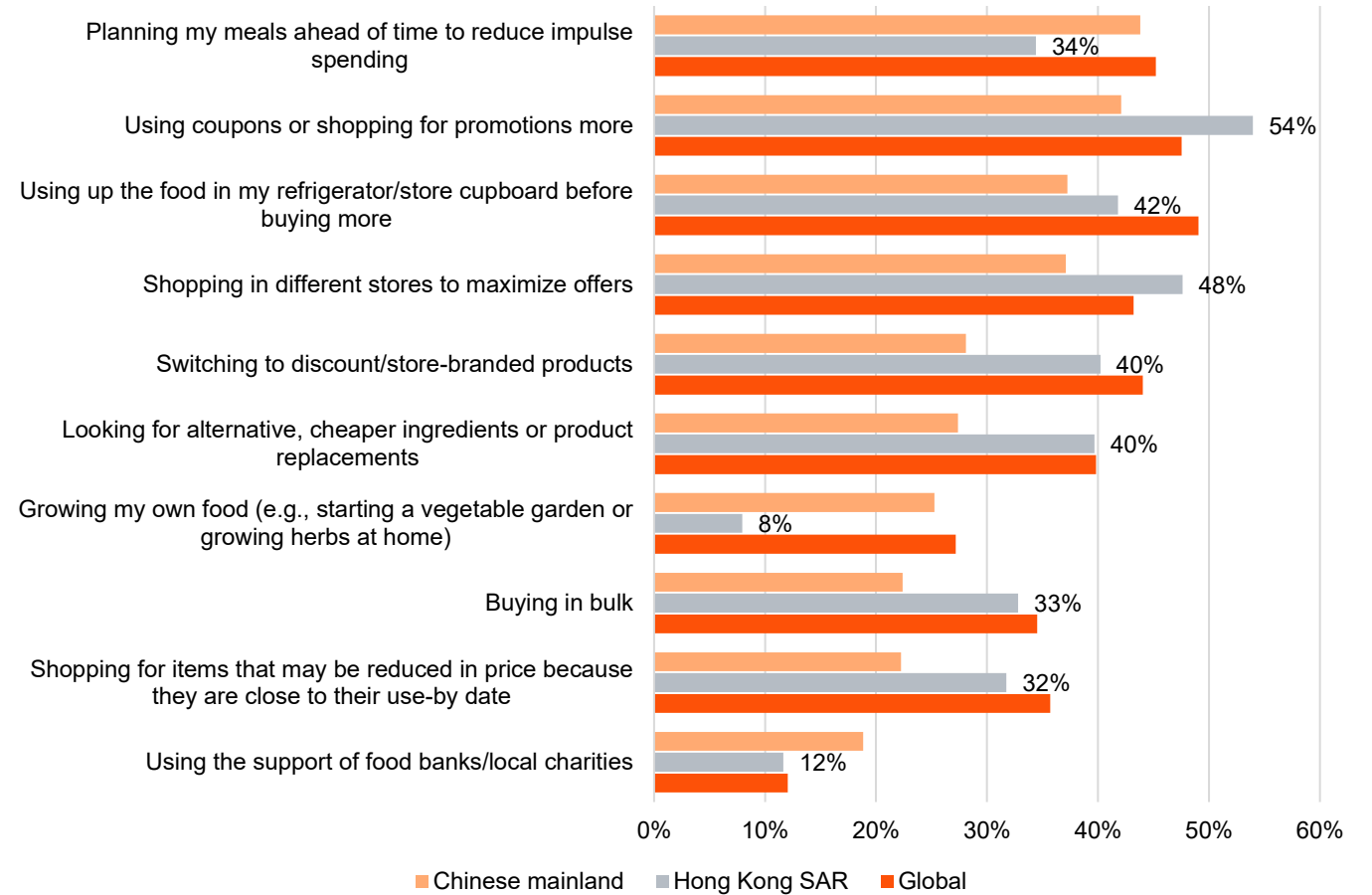
**Figure 1: Which of the following potential threats/risks do you feel could have the greatest impact on your country in the next 12 months (Ranked in top three)**



Source: PwC's Voice of the Consumer 2025 Global Survey

This consumer’s decision-making hierarchy is clear: price and promotional offers are the paramount factors in their food choices. Brand loyalty is a secondary concern, subordinate to the core principle of value. To manage household expenses, they employ a tactical trifecta of cost-saving measures: proactively using coupons (Hong Kong : 54%), cross-referencing prices across different stores (Hong Kong : 48%), and readily switching to store-branded products (Hong Kong : 40%).

**Figure 2: What actions, if any, are you taking to reduce or offset the effects of food cost?**



Source: PwC’s Voice of the Consumer 2025 Global Survey



This behavioral shift is the engine behind the explosive growth of hard discounters. In the Chinese Mainland, players like HotMaxx and ALDI are expanding rapidly, while in Hong Kong, mainstays like Daiso and 3Coins thrive. They succeed by offering a curated selection of branded goods at significantly lower prices and developing high-quality private labels that challenge the dominance of established national brands. The recent Kantar Worldpanel report underscores this, noting that the growth of discount chains is a primary driver of offline retail's resurgence.

For companies navigating this landscape, the dominance of the Value Seeker underscores the strategic importance of being a quick follower rather than a capital-intensive pioneer. In a market where margins are thin and consumers are skeptical, the

risk of a failed innovation is immense. Therefore, a “second-mover advantage” becomes a highly viable strategy. Once a concept—be it group buying, hard discounts, or a specific private-label category—is proven successful, a quick follower can rapidly replicate the model, often with refinements, avoiding the initial losses and uncertainty. This persona operates on a “seeing is believing” basis. They are largely immune to aspirational marketing; they need to see the low price tag on the shelf, feel the quality of the private-label product, and experience the savings in their bank account.



## Implications for retailers and brands:

- **Embrace aggressive and transparent value propositions**

Value Seekers are expert deal hunters. Retailers must not only offer competitive prices but also make them transparent and easy to compare. This means clear signposting of promotions, loyalty programs that offer tangible cashback or direct discounts rather than complex points systems, and leveraging price-matching guarantees.

Pinduoduo's early success was built on this persona, using group buying and a direct-from-factory model to create an unassailable low-price image.

- **Develop a two-tier private label strategy**

Investing in private labels is critical. A successful strategy involves two tiers:

- 1) A basic, no-frills line that competes directly on price for staple goods, and
- 2) A premium private label line that offers comparable quality to national brands at a discount.

The success of Walmart's Sam's Club with its Member's Mark brand in China is a powerful case study, demonstrating that consumers will flock to store brands that deliver on both quality and value.

- **Master omnichannel deal-hunting and instant retail**

This persona fluidly moves between online and offline channels. Retailers must ensure promotional consistency across apps, websites, and physical stores. Geo-targeted mobile alerts for in-store deals can drive foot traffic.

The "instant retail" battleground is another key channel. Value Seekers will compare 30-minute delivery options on Meituan, Ele.me, and JD Daojia not just for convenience, but for price.

Brands must ensure their products are available on these platforms and participate in platform-wide subsidy campaigns to capture impulse buys driven by a good deal.

- **Make health accessible through global value chains**

Healthy food should not be a privilege of the affluent—value-conscious consumers also seek nutritious options at affordable prices.

Brands should endeavour to leverage China's powerful manufacturing and global supply chain networks, companies can make healthier products accessible and cost-effective both domestically and abroad.

# The experience-driven gourmet: “Savoring the Moment”



## A Day in the Life: Zhang Hao, an upper middle-income interior designer, Shanghai

Zhang Hao’s Friday evening doesn’t begin at a standard supermarket. Instead, he heads to a newly opened “food hall” in the Huangpu District. The space is meticulously designed to evoke a bustling European marketplace, with distinct stations for artisanal cheeses, fresh-baked sourdough, and imported charcuterie. He spends a full half-hour conversing with the cheesemonger, sampling a smoky Spanish Manchego before deciding on a small wedge. He’s not just buying an ingredient; he’s acquiring a story to share at the dinner party he’s hosting tomorrow. Next, he selects a bottle of organic wine from a small, independent vineyard in France, a recommendation he discovered on Xiaohongshu

(Little Red Book) from a lifestyle blogger he follows. Later, he meets friends at a trendy fusion restaurant known for blending traditional Sichuan spices with Western molecular gastronomy techniques. He captures a picture of a visually stunning dessert—a yuzu-infused foam with popping candy—and posts it to his social media feed. The caption doesn't mention the price, but simply reads: “Taste exploration.” For Zhang Hao, food is the ultimate affordable luxury, a primary vehicle for entertainment, self-expression, and social currency.



## Persona Analysis

# 46%

**look forward to their meals signifies a central pillar of their entertainment and leisure time**

Source: PwC's Voice of the Consumer 2025 Global Survey

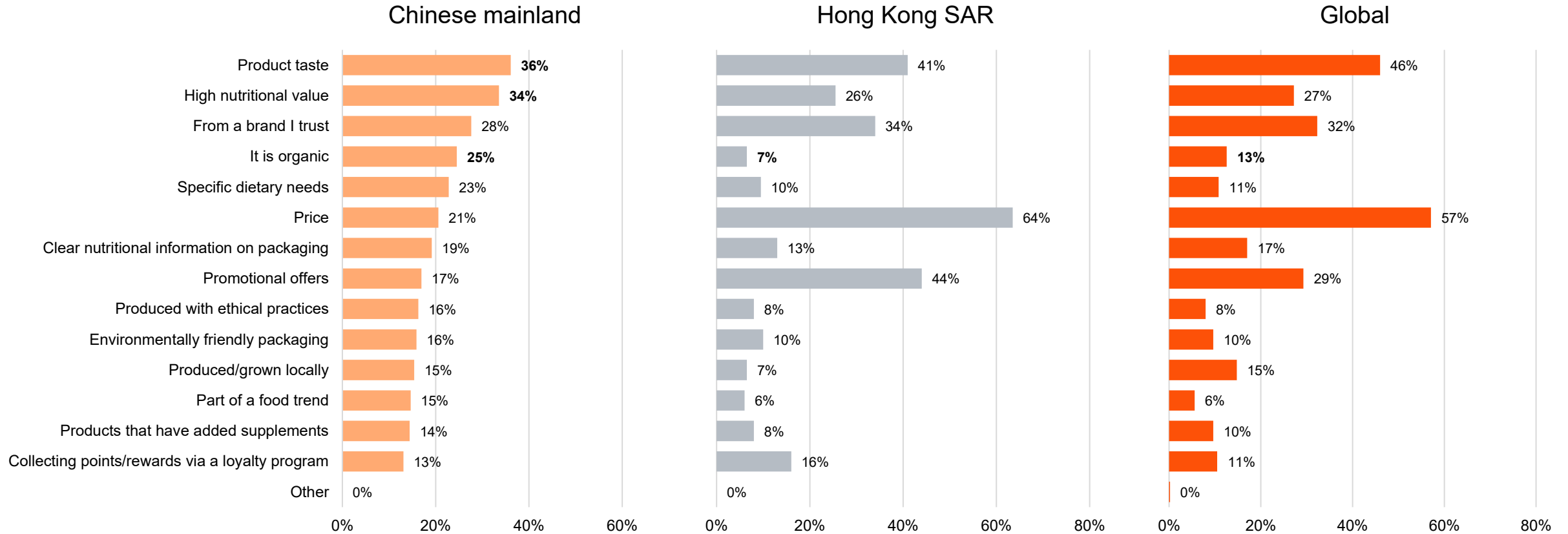
In stark contrast to the Value Seeker, the Experience-Driven Gourmet approaches consumption not as a calculation, but as an adventure and a form of self-expression. This persona, particularly prevalent among the growing middle and upper-middle income in the Chinese Mainland's Tier 1 and Tier 2 cities, views food as a primary vehicle for accumulating cultural capital and creating shareable social moments. The data showing that product taste is the paramount factor when choosing food (China: 36%) . “Taste” here is a proxy for a much broader concept that includes novelty, authenticity, craftsmanship, and the story behind the product. Their spending is an investment in their personal narrative.

They are explorers by nature, constantly seeking to push the boundaries of their palate and knowledge. They have shown interest in organic food (China: 25%, Hong Kong: 7%, Global: 13%). Their willingness to switch brands for the opportunity to try international foods (China: 23%, Global: 16%) is not just about tasting foreign cuisine; it's about participating in a global conversation, demonstrating a worldly and

sophisticated identity. The fact that nearly half (China: 46%) genuinely look forward to their meals signifies that food is not mere sustenance but an integral part of their daily activities. This consumer is the key force behind the macroeconomic trend where spending on services (dining out, travel, classes) has outpaced spending on physical goods. They understand that a unique experience provides a more lasting and socially valuable return than a material possession. This mindset makes them the ideal audience for experiential retail concepts.

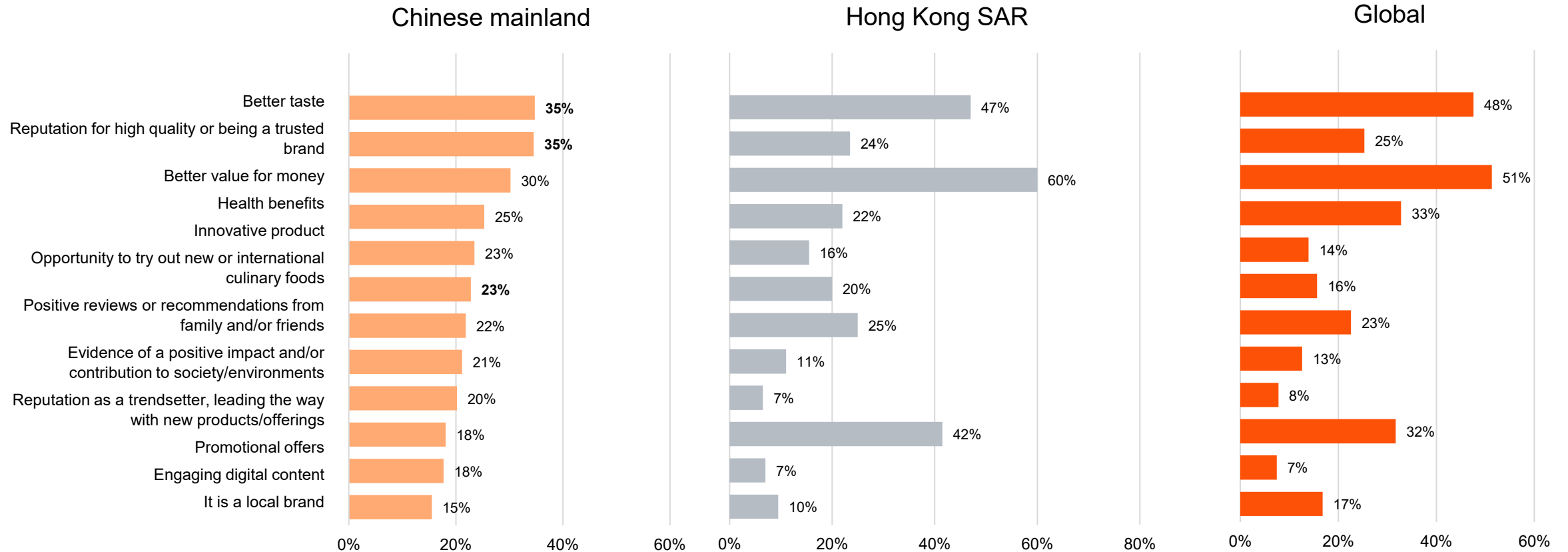
The success of hot pot chain Haidilao is a masterclass in catering to this persona; the complimentary manicures, board games, and snack bars are not just “freebies,” they are integral components of an experience designed to be memorable, enjoyable, and, crucially, shareable on social media. Their desire to incorporate foods from other cultures into their diet (nearly a third in both markets) is a direct reflection of their use of food as a tool for exploration and identity construction.

**Figure 3: When you are choosing which food items to buy, which factor are most important to you? (Ranked in top three)**



Source: PwC's Voice of the Consumer 2025 Global Survey

**Figure 4: Which of the following factors, if any, would encourage you to switch from a food brand you usually buy, to a different brand? (Ranked in top three)**



Source: PwC's Voice of the Consumer 2025 Global Survey



## Implications for retailers and brands:

- **Transform the store into a “Retail-as-Destination”**

Move beyond transactional selling and create immersive, multi-sensory environments. This means investing in in-store tasting stations, hands-on cooking classes with guest chefs, themed pop-ups celebrating a specific region’s cuisine, and expert-led workshops (e.g., wine pairing, coffee brewing). The physical store must become a place of discovery and entertainment, justifying a trip in an age of instant delivery.

- **Embrace “Grocerants” and food service integration**

The line between grocery and restaurant is blurring. High-end “grocerants” where consumers can dine on a freshly prepared meal and then purchase the exact ingredients they just enjoyed are a powerful model. This captures the Gourmet’s spending in a single, seamless experience. Partnering with well-regarded local chefs or restaurants for in-store pop-ups can also generate significant buzz and foot traffic.

- **Master content-driven digital engagement**

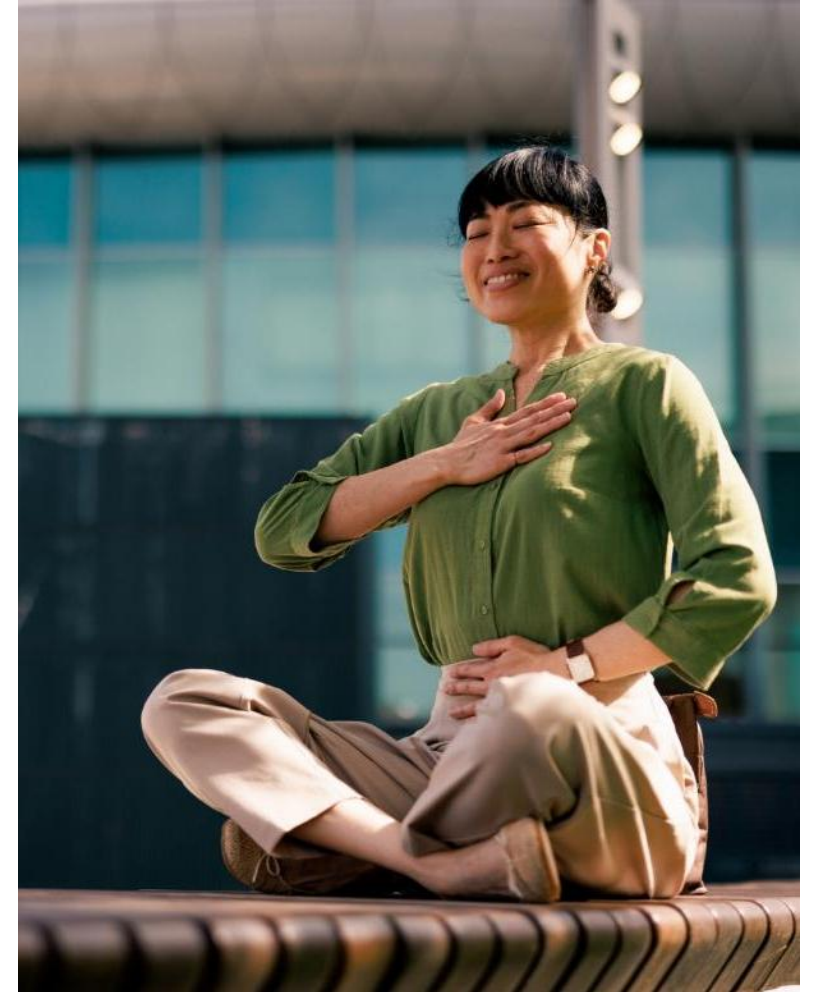
Platforms like Xiaohongshu and Douyin are this persona’s natural habitat. The focus should be on visual, experience-oriented content, not just product shots. Collaborate with food-focused Key Opinion Leaders (KOLs) and Key Opinion Consumers (KOCs) who can create authentic, compelling content around unique flavors, innovative recipes, and the “story” of a product. Live-streamed cooking sessions or “behind-the-scenes” tours of a supplier’s facility can be highly effective.

# The eco-sporty wellness advocate: “Healthy Planet, Healthy Me”

## A Day in the Life: Chenxi, a yoga instructor in Chengdu

Chenxi’s day begins with a disciplined run along the beautiful Jin River, a daily ritual to connect mind and body, before she drives to her studio in a zero-emission BYD electric car. For breakfast, she prepares a smoothie using organic spinach, plant-based protein powder, and fresh fruit she purchased at a local farmers’ market. When packing her lunch, she opts for a quinoa salad with ingredients from a local farm that employs regenerative agriculture practices—a fact she verified by scanning a QR code on the product’s packaging. At the grocery store later, she faces a choice: a cheaper, conventionally grown apple shrink-wrapped in plastic, or a slightly more expensive, loose, organic apple. She chooses the latter

without hesitation. She actively seeks out sustainability certifications like the “China Organic Product” label on packaging and uses an app to track the carbon footprint of her purchases. In the evening, she scrolls through social media, not just for fitness tips, but to follow brands like Yum China that are transparent about their sustainability efforts, such as recycling coffee grounds and promoting sustainable agriculture. For Chenxi, every purchase is a direct reflection of her values: a healthy body and a healthy planet are one and the same.





## Persona Analysis

The Eco-Sporty Wellness Advocate operates from a deeply held, holistic worldview that personal health and planetary health are two sides of the same coin. Their consumption is a form of activism, a daily, conscious vote for a future they believe in. This rapidly growing segment, particularly among educated urban millennials and Gen Z, is defined by a meticulous and almost forensic attention to the inputs in their food

and the outputs of their lifestyle. Their high level of concern about health risks from ultra-processed foods (58%) and the use of additives or preservatives (53%) stems from a desire for control and purity in a world they perceive as increasingly contaminated and artificial. This “chemophobia” fuels a rejection of products with long, unpronounceable ingredient lists and a powerful attraction to “clean labels”.

**58%**

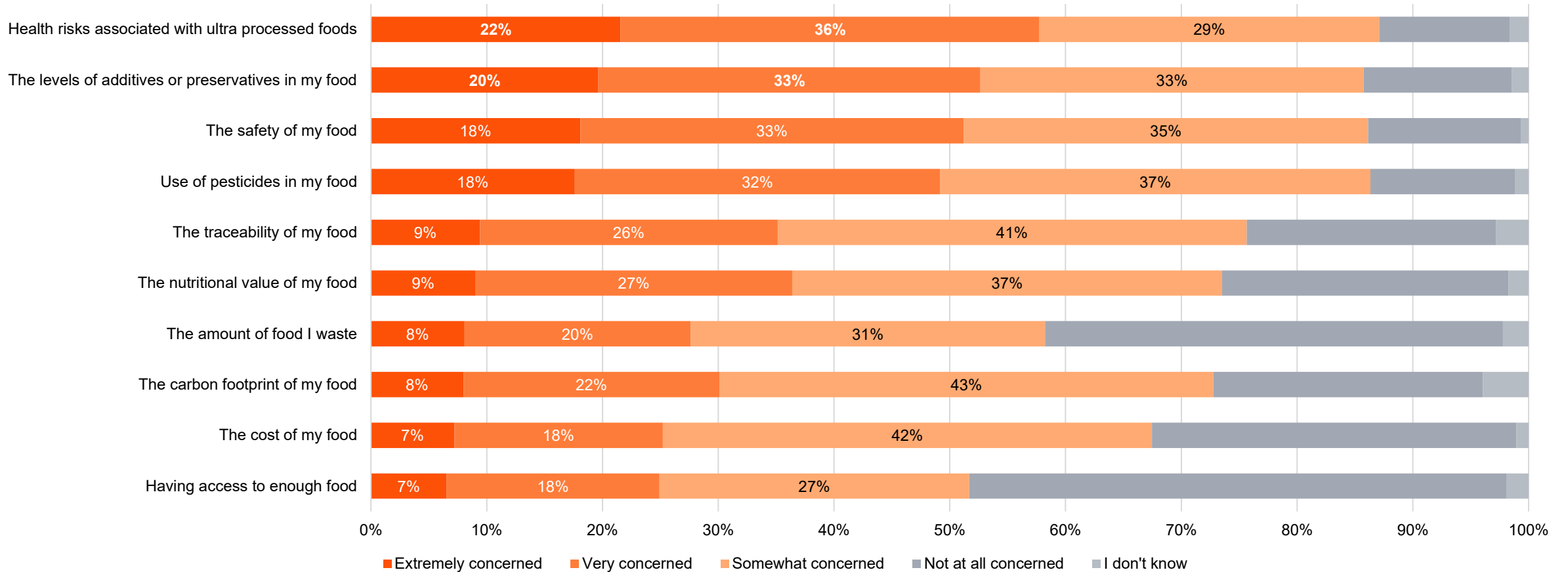
**High level of concern about health risks from ultra-processed foods**

**53%**

**High level of concern about use of additives or preservatives in foods**

Source: PwC's Voice of the Consumer 2025 Global Survey

**Figure 5: How concerned, if at all, are you about the following? (asked of Chinese mainland respondents)**



Source: PwC's Voice of the Consumer 2025 Global Survey

This proactive stance on health is comprehensive. Their diet prioritizes high nutritional value (China: 34%, Global 27%) and fresh produce (plan to eat more: 60%), taking supplements to help improve health (China 38%) and this is complemented by a commitment to physical fitness (59% exercise regularly). Their discipline is remarkable, with a staggering 92% in China actively avoiding ultra-processed foods, indicating a fundamental shift in dietary patterns away from convenience at any cost.

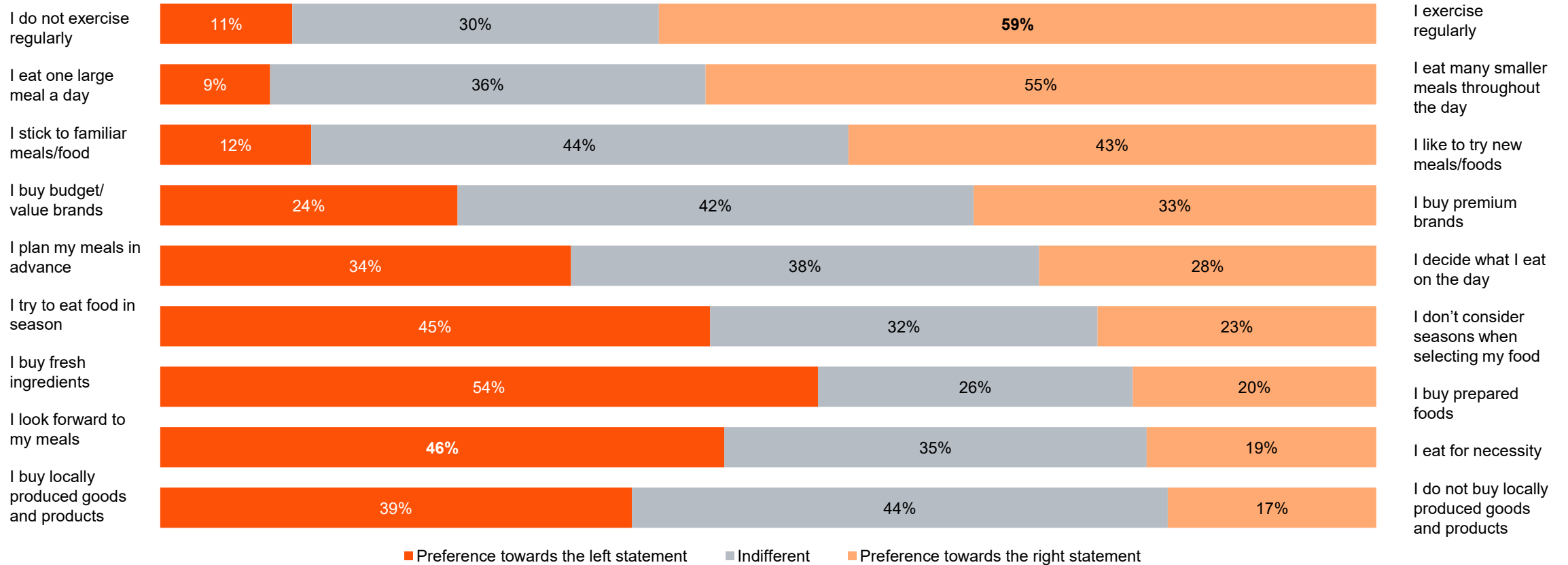
This aligns with the broader national narrative of health as the “new luxury,” where investing in one’s body is seen as the ultimate status symbol. Simultaneously, their environmental consciousness is not passive. It translates into tangible actions like buying only what they need to combat food waste (China: 58%) and preferring sustainable packaging (China: 43%).

The most critical data point for brands is that this

conviction has economic weight: a significant majority in the Chinese Mainland (63%) are willing to pay a premium for food that supports environmental health. This willingness to pay is not just for a vague “green” claim; it is payment for peace of mind, for the assurance that their consumption is not causing harm. They are researchers and actively seeking information on corporate sustainability, meaning they will verify claims and reward brands that demonstrate genuine, transparent commitment.

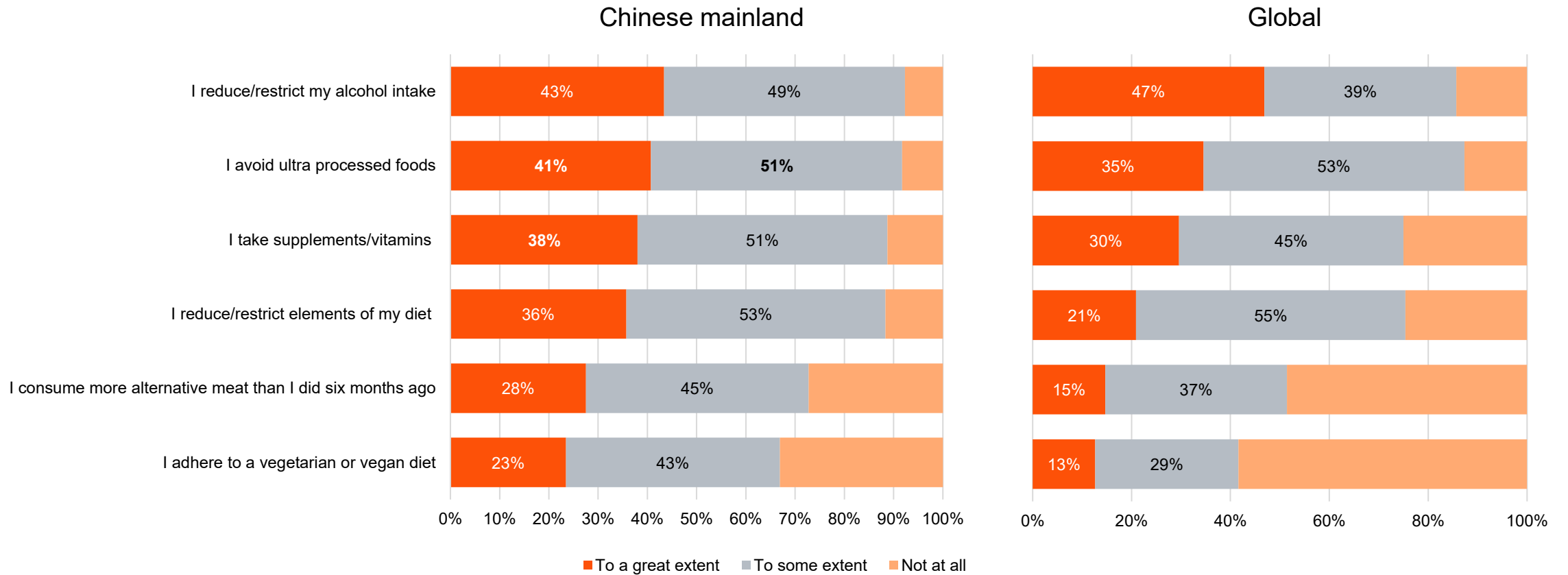


**Figure 6: Please select a point along the scale between the two options in each row that indicate your typical food habit/preferences most of the time. (asked of Chinese mainland respondents)**



Source: PwC's Voice of the Consumer 2025 Global Survey

**Figure 7: To what extent do you make the following health-related choices in your diet?**



Source: PwC's Voice of the Consumer 2025 Global Survey



## Implications for retailers and brands:

- **Radical transparency and clean, functional nutrition**

Trust is the new currency for health-focused consumers. Brands must prove their integrity through verifiable claims—clear on-pack labeling, third-party certifications, and QR codes offering traceability on sourcing, farming, and carbon footprint.

At the same time, product assortments should emphasize “clean” and functional foods: organic, minimally processed, and enriched with beneficial ingredients such as probiotics, adaptogens, or Traditional Chinese Medicine (TCM) staples like goji berries and red dates. Retailers can amplify this with dedicated wellness zones and transparent communication, turning trust and nutrition into a unified value proposition. Brands like Three Squirrels and Bestore have successfully launched product lines targeting these needs.

- **Embed sustainability into core operations**

Sustainability cannot be a superficial marketing campaign. It must be a visible part of the business model. This includes initiatives like reducing food waste through partnerships with food banks, offering refill stations for bulk items like grains and oils, eliminating single-use plastics, and promoting products with eco-friendly packaging. Publicly reporting on ESG (Environmental, Social, and Governance) goals and progress is crucial for building credibility.

- **Focus on nutrient-dense and performance-oriented nutrition**

This consumer understands the link between diet and physical performance. They are the target audience for high-protein snacks, low-sugar energy drinks, and plant-based meal replacements. Marketing messages should be specific and science-backed, highlighting benefits like “muscle recovery,” “sustained energy,” or “gut health support,” moving beyond generic “healthy” claims.

# The tech-savvy digital native: “Life, Optimized”



## A Day in the Life: Lu Qi, a content creator and live streamer, Hubei

Lu Qi’s day begins with a haptic buzz from his wearable, which displays his “sleep score” and suggests a 30-minute HIIT workout to optimize his energy for an upcoming stream. Post-workout, he consults a GenAI-powered health app on his phone. He voice-inputs his fitness goals and dietary restrictions (“high-protein, low-carb, vegan”), and the app instantly generates a complete meal plan for the day, complete with recipes and a nutritional breakdown. With a single tap, the app compiles a grocery list. Lu Qi then opens his preferred grocery app, which, using predictive analytics, has already pre-populated a shopping list for him. He confirms the order and schedules a delivery by a DJI drone.

While taking a break from scripting his next video, he scrolls through Douyin. A viral clip catches his eye: another creator unboxing the new Unitree B2, a highly advanced quadruped robot. Instantly, Lu Qi’s mind floods with content ideas—a live-streamed unboxing, a series testing the robot’s AI capabilities, or even programming it to interact with his followers’ live comments. He immediately begins researching the robot’s specs and searching for potential brand collaboration opportunities. For Lu Qi, technology is not just a personal assistant; it is the raw material for his creativity and career, the ultimate tool for optimizing his life and finding the next big thing to capture his audience’s imagination.



## Persona Analysis

# 44%

**in Chinese Mainland think wearable technology has already meaningfully changed their daily habits**

Source: PwC's Voice of the Consumer 2025 Global Survey

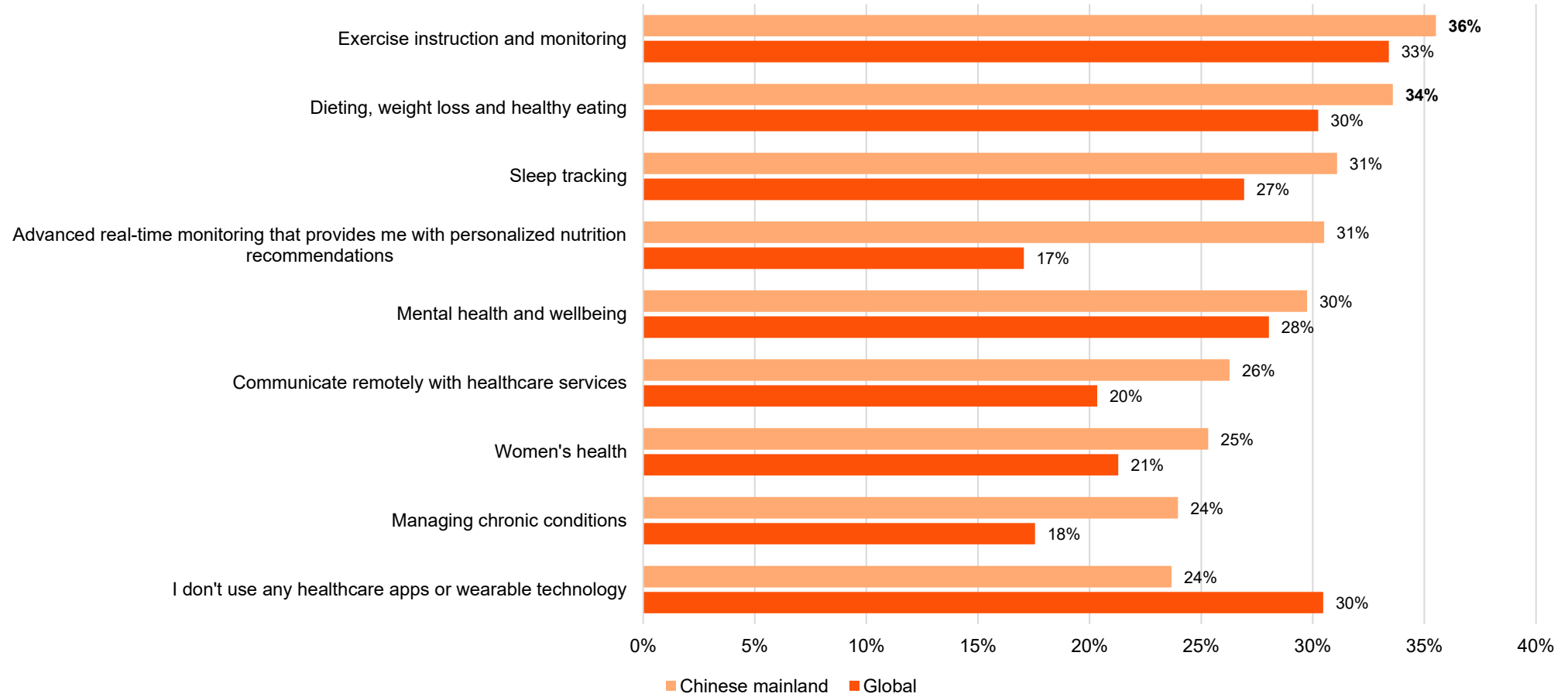
The Digital Native exists at the dynamic intersection of technology, health, and hyper-convenience, viewing their life as a system to be optimized for peak performance. This consumer, typically Gen Z or a young millennial, navigates their daily routine through an integrated suite of digital tools. They are not just users of technology; they are its power users. Their avid adoption of healthcare apps and wearable technology to meticulously monitor exercise (China: 36%), diet (China: 34%), and sleep is telling. It reveals a deep trust in quantifiable data and a belief that self-improvement can be algorithmically guided. For a significant 44% in Chinese Mainland, this technology has already catalyzed a meaningful change in their daily habits, demonstrating a direct causal link between tech adoption and lifestyle modification.

They are quintessential early adopters, exhibiting a comfort with and curiosity towards emerging technologies that often outpaces corporate adoption. The finding that a notable segment is already comfortable allowing GenAI to create personalized nutrition plans (Hong Kong : 45%) and design personal training regimes (China: 46%) is a powerful

signal. It indicates a willingness to trust an AI's data-driven recommendation over traditional sources of authority, like a general practitioner or a generic diet plan.

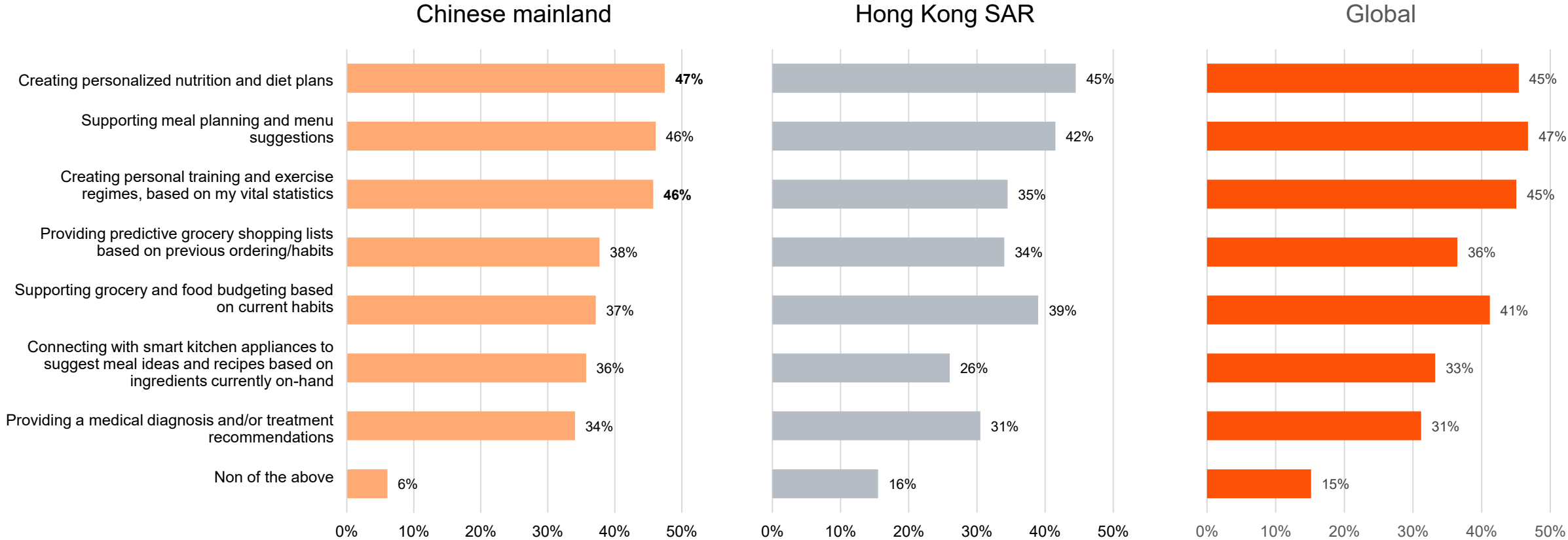
This persona's information ecosystem is mainly digital; they learn about brand's climate and sustainability initiatives predominantly through social media (Hong Kong : 66%, China: 58%), with a preference for dynamic, video-first platforms like Douyin. It is noteworthy that the Chinese consumers will also pay attention to retail store displays (Chinese:42%, Hong Kong :29%, Global 25%) to learn about retailers/brands initiatives. They are the core user base for the fiercely competitive instant retail market. For them, the 30-60 minute delivery promise of platforms like Meituan Instashopping is not a luxury or a "nice-to-have," but the expected baseline of service. Any less is an inconvenience. The intense competition in this sector is a direct response to the uncompromising expectations of this digitally native consumer, who demands a frictionless, on-demand world.

**Figure 8: Do you use healthcare apps or wearable technology for any of the following reasons/activities?**



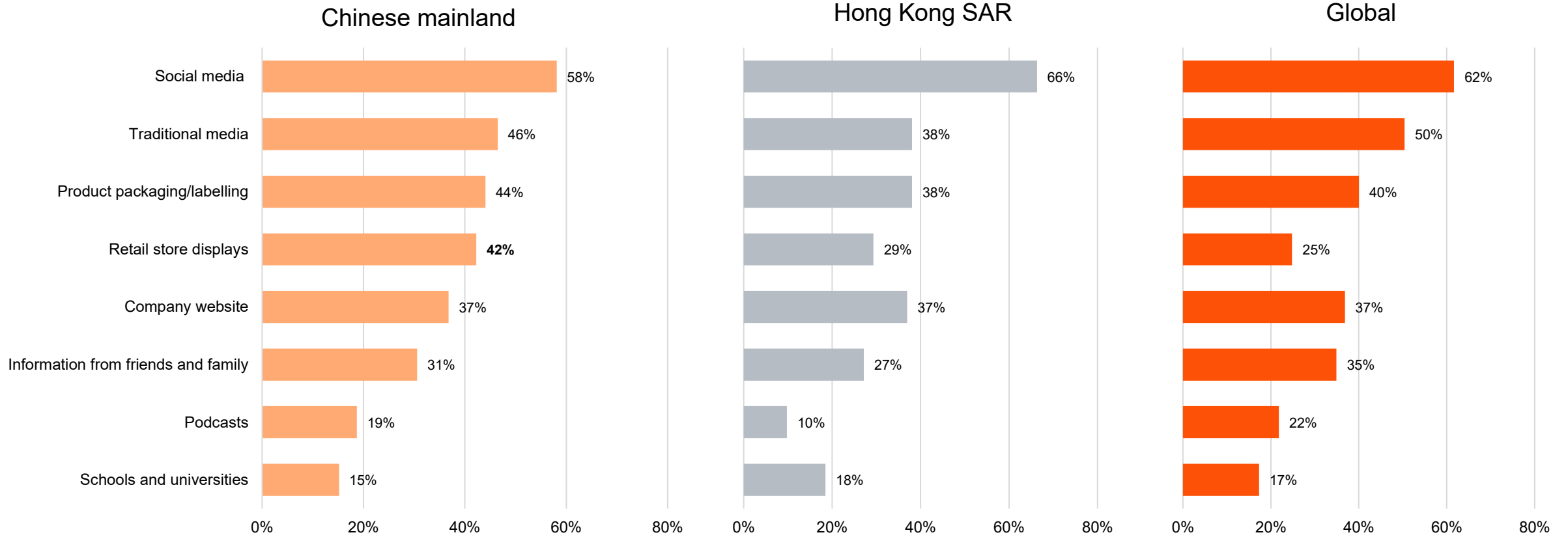
Source: PwC's Voice of the Consumer 2025 Global Survey

**Figure 9: Which of the following activities would you be comfortable allowing GenAI to perform?**



Source: PwC’s Voice of the Consumer 2025 Global Survey

**Figure 10: What sources do you typically learn information about a company’s climate and sustainability initiatives from?**



Source: PwC’s Voice of the Consumer 2025 Global Survey



## Implications for retailers and brands:

- **Invest in personalized GenAI tools**

The expressed willingness of consumers to use GenAI for health and nutrition is a clear and massive opportunity. Retailers should develop or integrate AI-powered tools that offer personalized meal planning based on wearable data, dietary preferences, and fitness goals. These tools can automatically generate shopping lists that can be fulfilled with a single click via an integrated instant retail service. Taobao's experimental AI chatbot “Wenwen” is an early-stage example of this trend.

- **Build a frictionless, “Phygital” experience**

This persona demands a seamless journey between the digital and physical worlds. Online platforms must be mobile-first, with intuitive UIs and integrated digital payment systems like Alipay+ and WeChat Pay. In-store, technologies like “scan-and-go” apps, smart shopping carts, and AR-powered product information displays can enhance convenience and bridge the gap. The key is to eliminate all points of friction.

- **Dominate digital channels with authentic content**

Marketing must be digitally native and platform-specific. Focus on short-form video content on Douyin, in-depth tutorials on Bilibili, and aesthetically pleasing lifestyle content on Xiaohongshu. Influencer marketing is key, but authenticity is paramount. Collaborating with tech-focused KOLs to review a new retail app or with fitness influencers to co-create a GenAI meal plan can be far more effective than traditional advertising.

# The traditionalist domestic brand supporter: “Rooted in Culture, Focused on Quality”

## A Day in the Life: Mrs. Wang, a public servant retiree, Beijing

Mrs. Wang’s morning routine includes a trip to her local wet market, a habit she’s maintained for decades. She trusts the vendors she has known for years and prefers buying fresh, seasonal produce directly. When she visits the supermarket, her cart is filled with familiar domestic brands she has relied on for a long time. Recently, she decided to try a new yogurt from the Chinese dairy giant Yili. The product, which she saw advertised on television, featured traditional wellness ingredients like red dates and goji berries. She feels a distinct sense of pride seeing Chinese companies innovate and create high-quality products that cater to local tastes. When her son suggested buying an imported brand of cooking oil

that was on sale, she politely declined, preferring to stick with her usual Arawana brand, which she believes is better suited to Chinese cooking techniques and has a more reliable safety record. Her purchasing decision is a quiet but firm statement of confidence, not just in “Made in China,” but in “Well-made in China.” She is part of a growing wave of consumers who see supporting high-quality local brands as an investment in the national economy and a celebration of cultural ingenuity.





## Persona Analysis

# 29%

**state their cultural background strongly influences their food choices in the Chinese Mainland**

Source: PwC's Voice of the Consumer 2025 Global Survey

This consumer's purchasing decisions are a powerful expression of their cultural identity and a confidence in domestic innovation. This is particularly pronounced in the Chinese Mainland, where 58% state their cultural background strongly or often influences their food choices, a figure that speaks to a deep-seated connection between diet and identity. They are the heart of the "Guochao 2.0" movement, which represents a sophisticated evolution from a simple preference for "Made in China" to an enthusiastic embrace of "Well-made in China." This is not blind patriotism: it is a rational and emotional response to a perceived rise in the quality, aesthetic appeal, and cultural relevance of domestic brands.

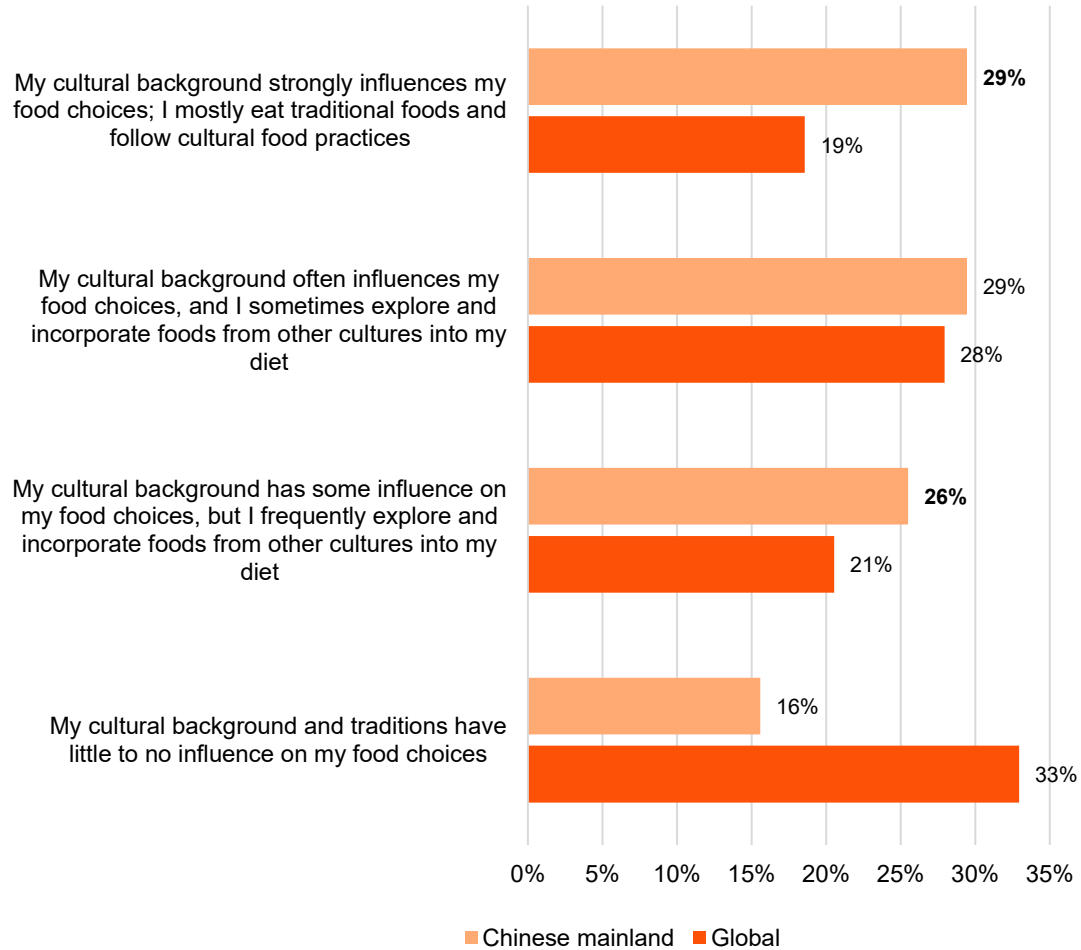
This preference is rooted in tangible beliefs: 50% believe locally produced food is healthier, and 43% believe it is of higher quality.

This combination of perceived health benefits and quality assurance creates a powerful value proposition that challenges international competitors directly.

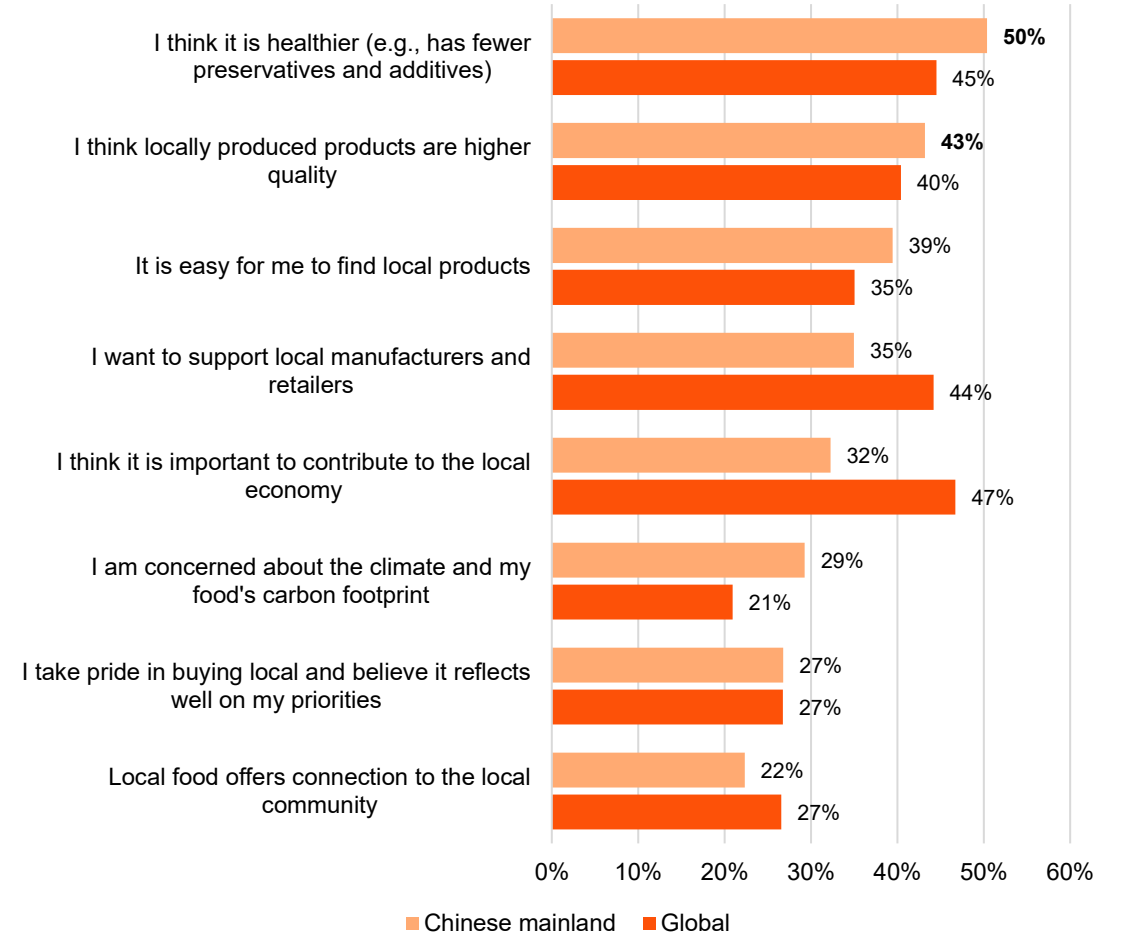
Their trust is placed in established brands with a strong reputation (China: 35% switch for this reason), indicating that while they champion Chinese brands, they are still looking for markers of reliability and safety. This powerful consumer sentiment has been the launchpad for a new generation of Chinese giants like HeyTea and Florasis, who have masterfully blended modern marketing with authentic cultural storytelling to forge a deep, resonant connection with this crucial consumer group.

It is interesting to note that 26% of the Chinese respondents frequently explore and incorporate foods from other cultures. Indeed, Chinese consumers remain open to international products - especially those that offer superior quality, innovative technology, or a unique heritage.

**Figure 11: How, if at all, do your cultural background and traditions influence the types of foods you choose to eat?**



**Figure 12: You have noted that you typically buy food that is locally produced. What are the main reasons for that choice? (Ranked in top three)**



Source: PwC's Voice of the Consumer 2025 Global Survey



## Implications for retailers and brands:

- **Champion "Guochao 2.0" with authentic cultural integration**

Retailers and brands must embrace the "Guochao" movement by strategically championing high-quality domestic products and authentically integrating Chinese cultural narratives. This goes beyond simply stocking items; it requires creating dedicated "Best of China" retail spaces, developing exclusive co-branded products, and marketing that tells a compelling story of local heritage and innovation. This cultural integration must be respectful and deep, avoiding superficial clichés. A successful approach involves weaving traditional elements into product design, packaging, and even the product's core ingredients - such as using traditional wellness botanicals - to demonstrate a genuine understanding of local philosophies and tastes.

- **Build brand equity on trust, quality, and reputation**

This consumer is loyal to brands that have earned their trust over time. Marketing should emphasize quality assurance, stringent safety standards, and the brand's history and legacy. For new Guochao brands, building this reputation requires transparency in sourcing and production, excellent customer service, and leveraging positive word-of-mouth from trusted sources. Long-term brand-building strategies will always outperform short-term promotional tactics with this group.

- **Innovate within traditional health and nutrition paradigms**

This persona is highly receptive to health concepts rooted in Traditional Chinese Medicine (TCM). There is a significant opportunity for brands to innovate in the healthy snack and functional food categories by incorporating TCM ingredients known for their wellness benefits (e.g., ginseng, astragalus, lotus root). The product should be modern and convenient (e.g., a ready-to-drink herbal soup or a snack bar), but the health story should be rooted in trusted cultural traditions.

# About the survey

In January and February 2025, PwC surveyed 21,075 consumers across 28 countries and territories: Australia; Brazil; Canada; Chinese mainland; Egypt; France; Germany; Hong Kong SAR; Hungary; India; Indonesia; Ireland; Malaysia; Mexico; the Netherlands; the Philippines; Poland; Qatar; Romania; Saudi Arabia; Singapore; South Africa; Spain; Thailand; the United Arab Emirates; Ukraine; the United States; and Vietnam. The respondents were at least 18 years old and were asked about a range of topics relating to consumer food

consumption and trends, including grocery shopping and food choices, the future of health, emerging technology, and climate and sustainability issues.

Interviews with industry executives took place in May 2025.

PwC's global centre of excellence for market research and insight conducted this survey.

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