

The Good Life, Reimagined

Accenture Chinese Consumer Insights

Executive summary

What makes China's 1.4 billion consumers so compelling is the powerful convergence of economic, demographic, technological and cultural forces reshaping their behaviors. Over the past decade, Accenture has traced these changing behaviors to connect the dots; this year's study goes even further to put trends into their historical perspectives, shedding light on their significance.

Our 2025 study reveals that local brands are now preferred over international ones across the board, a reversal of the situation just four years ago. Furthermore, artificial intelligence (AI) has already transformed the consumer landscape and will have profound implications in the years to come. Contrary to conventional wisdom, Chinese consumers are not becoming more materialistic as their purchasing power grows. Instead, they are boldly redefining what a good life means and can look like.

Chinese consumers now practice what we call "considered consumption", questioning what they really need rather than buying out of habit. Instead of blind brand loyalty, they now seek out experiences that truly add value. Engagement is fractured across a wide range of touchpoints, and consumers now trust their own judgment more than influencers. Nearly 70% say they feel indifferent or even resistant to most marketing content, a clear sign that the old ways of connecting with consumers just don't work anymore.

So, what does work? Beneath the superficial changes, a few clear themes emerge. Chinese consumers are cautious but not pessimistic. Facing uncertainty, they're actively exploring new paths and prioritizing what matters most—health, family and financial security. They're taking control through exercise, saving and continuous learning. Finally, they're also embracing AI as a tool for inspiration and decision-making.

For brands and retailers, this dual dynamic of restraint and balance is both a challenge and an opportunity. To win hearts, minds and algorithms, companies need to rethink loyalty, create engaging experiences and use AI for faster insights and deeper connections. Those who can meet these discerning expectations with real value and meaningful experiences will capture new growth and secure a place as trusted, long-term partners in people's lives.

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The rise of considered consumption: Why previous brand messages no longer resonate

For years, international consumer brands dominated the Chinese market thanks to strong brand recognition built over time. Even at premium price points, they maintained loyal followings, especially among high income consumers with well-established purchasing habits.

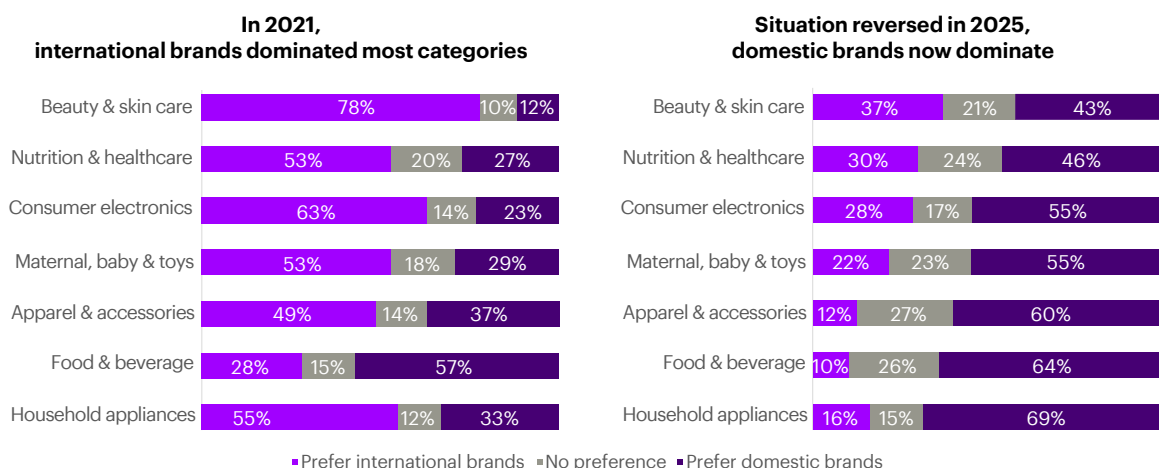
That loyalty, however, has been upended. The pandemic and broader economic shifts disrupted spending patterns and eroded the long-standing halo around international brands. Amid growing uncertainty and weaker income expectations, Chinese consumers have become more cautious and deliberate in their choices, a trend we are calling “considered consumption” (see page 5).

As recently as 2021, international brands still appeared unassailable. In beauty and skincare, for example, nearly 80% of consumers preferred foreign labels, while domestic brands captured just over 10% of the market (Figure 1).

In only four years, that balance has flipped. Today, more consumers favor domestic beauty and skincare brands than international ones (43% vs. 37%). The reversal has been even more pronounced in consumer electronics and home appliances, where domestic players have not only surpassed their global competitors but firmly established market leadership.

Across nearly every major consumer category—from beauty to home appliances, food and beverages to apparel and footwear—the momentum has shifted decisively toward domestic brands.

Figure 1: In just four years, consumers have reshaped China’s market landscape



Note: All percentages are rounded.

Source: Accenture 2025 China Consumer Survey (N=5,000); Accenture 2021 China Consumer Survey (N=10,140)

Survey questions: 1) Which categories of products have you purchased recently? 2) When purchasing the following categories, what is your preference?

International brands are retreating into narrower territory—focusing on a handful of high-tech, high-premium categories and affluent consumers. Their once-formidable competitive “moats” are steadily shrinking.

At the same time, domestic brands are advancing into mid- to high-end segments, leveraging strong value propositions to mount a broad offensive.

This market transformation reflects more than just brand rivalry—it signals a profound shift in how consumers think, choose and trust.

This year’s survey indicated that, price remains the leading factor driving preference for domestic brands (85%), but unique product

features now follow closely at 70%, an 11-point increase since 2021. Beyond functionality, domestic brands also excel at weaving local narratives and cultural storytelling into their offerings. In doing so, they elevate products beyond mere commodities, offering emotional connection and turning them into symbols of identity and pride (55%).

When domestic brands deliver both strong value and cultural confidence, they capture consumers’ hearts and wallets. For global brands, the message is clear: Lasting loyalty in China depends on understanding both the functional needs and emotional aspirations of consumers in a competitive marketplace.

What is “considered consumption”? /

More than simply a response to external conditions, considered consumption reflects a shift from impulse to intention. It describes how people are becoming more deliberate about what they buy, not just because of tighter budgets or uncertainty, but because of greater self-reflection. Consumers are questioning what they truly need, researching across channels, comparing options and trusting their own judgment over influencers or brands.

Today, 55% of Chinese consumers—even those with go-to brands—frequently compare multiple options before buying (Figure 2). Many even consider the selection process itself to be part of the shopping experience.

At the same time, the number of information-gathering touchpoints has fragmented dramatically. As new tools and platforms emerge, consumers navigate seamlessly among e-commerce sites, livestreaming and video platforms, influencer recommendations, and AI-driven tools for price comparison and decision support (Figure 3).

In today's era of information overload, consumers often experience decision fatigue. Accenture's 2024 Global Consumer Pulse survey reveals that 76% of Chinese consumers have abandoned a purchase due to too many options or difficulty making a decision.

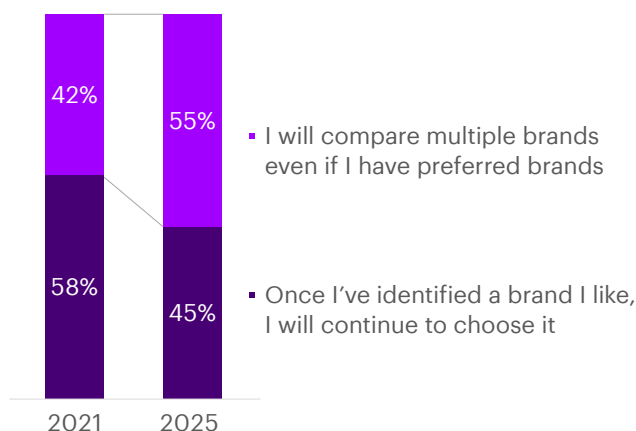
While the volume of information impacts a brand's ability to build trust and loyalty, the very mechanism of consumer trust has undergone a profound transformation. Our survey this year reveals that the influence of livestream hosts

and celebrity endorsements has diminished. Consumers are no longer blindly following others; instead, they are placing far greater weight on what they can personally see, experience and feel (Figure 4).

And their tolerance for marketing content is reaching its limit. Nearly 70% of respondents report feeling indifferent or even resistant toward most marketing campaigns, and only 32% say they have made purchases because the content itself was engaging. Traditional marketing strategies are increasingly ineffective; flooding consumers with content no longer generates authentic engagement or conversion.

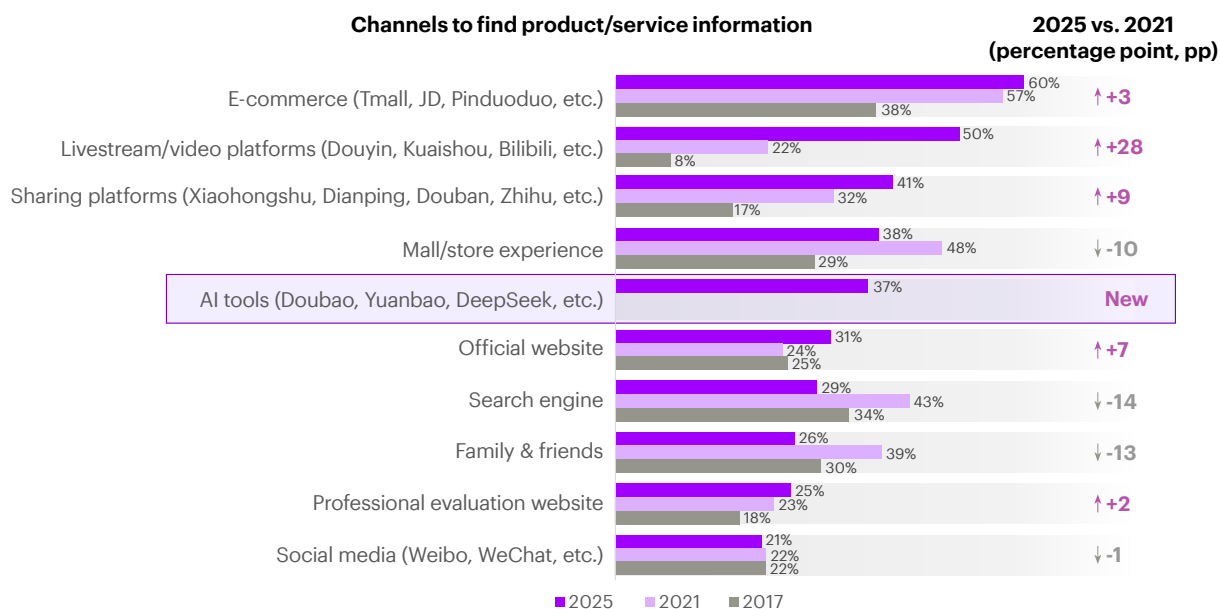
The failure of traditional marketing formulas reflects a widening gap between brand strategies and consumers' deeper needs. As existing choices fall short of expectations, consumers reassess what is truly worth their trust and investment. To stay relevant, brands must recognize and deeply understand the evolving values and mindsets of Chinese consumers.

Figure 2: Brand loyalty is being diluted



Source: Accenture 2025 China Consumer Survey (N=5,000); Accenture 2021 China Consumer Survey (N=10,140)
Survey question: Between the following two statements, which do you agree with more?

Figure 3: Consumer touchpoints are increasingly fragmented, with continuous shifts across channels

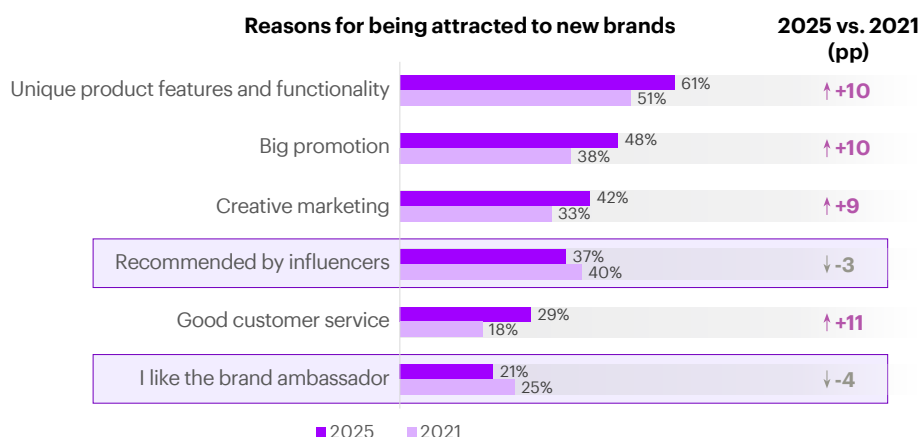


Note: All percentages are rounded.

Source: Accenture 2025 China Consumer Survey (N=5,000); Accenture 2021 China Consumer Survey (N=10,140); Accenture 2017 China Consumer Survey (N=4,060)

Survey question: When you have a clear purchase need, through which channels do you typically search for product/service information?

Figure 4: Consumers change from “follow the influencers” to “trust how I feel”



Note: All percentages are rounded.

Source: Accenture 2025 China Consumer Survey (N=5,000); Accenture 2021 China Consumer Survey (N=10,140)

Survey question: Thinking about the last time you were attracted to a new brand, what factors—besides recommendations from friends—sparked your interest?

Redefining the good life: A better balance

After years of pandemic disruptions and economic uncertainty, Chinese consumers are reimagining what a “good life” means. They are rebalancing life goals, shifting away from relentless striving toward a more holistic pursuit of well-being, reclaiming a sense of control and meaning.

For many, AI has become a guide in the pursuit of a good life, enabling more autonomous, convenient exploration and decision-making. In the consumer arena, the fusion of online efficiency with the tangible quality of offline experiences now defines the preferred path to satisfaction.

A new vision of a good life is emerging: it is balanced and rich, seamlessly blending the digital and the physical.

Looking inward for meaning and outward for control

Chinese consumers are moving beyond the once-dominant focus on work to place greater value on health, wealth and quality of personal life. The shift is especially pronounced at the two ends of the age spectrum (Figure 5).

Figure 5: Compared to 2021, Chinese consumers place higher importance on health and wealth, and lower importance on career, romance and personal growth



Color coding: Purple cells indicate growth from 2021, with darker shades showing greater increases; gray cells indicate decline, with darker shades representing larger decreases.

Source: Accenture 2025 China Consumer Survey (N=5,000); Accenture 2021 China Consumer Survey (N=10,140)

Survey question: Based on your current life stage, which three options matter most to you? (Ranked in order of importance)

**Young consumers
(born in the 1990s and 2000s)**

Growing up in a relatively affluent era, this group is still in the early stages of their careers, with limited wealth and life experience, and many have not yet started families. At this vulnerable starting point, slower economic growth and rising unemployment—exacerbated by the AI-driven transformation of the labor market—have made them especially anxious about the future. Their priorities reflect a rapid contraction of focus, with health and wealth viewed as fundamental safety nets, while more aspirational pursuits such as love, friendship and personal growth have been pushed aside.

**Middle-aged consumers
(born in the 1970s and 1980s)**

This group once viewed career achievement as life's central pillar, not only for financial stability but also as the primary source of identity and accomplishment. However, recent waves of layoffs have shaken their belief that hard work guarantees reward, prompting a reassessment of priorities. They increasingly recognize good health is essential, while wealth accumulation has become a new source of security. These shifts reflect both a rebalancing of life focus and a redefinition of personal identity.

**Older consumers
(born in the 1960s)**

With reduced responsibilities toward family and career, this group is refocusing on wealth accumulation and personal hobbies. Wealth now supports improved living standards and provides a safeguard for retirement and healthcare. Meanwhile, the rising importance of hobbies reflects a growing self-awareness. For these consumers, the good life is a shift away from sacrifice and responsibility to a return to self.

These shifting priorities are already evident in daily life. Over the past year, nearly 90% of consumers have focused on physical and mental health, over 70% have saved money or reduced discretionary spending and 60% have invested in skill development or side businesses (Figure 6). Together, health, savings and new skills form a **“triangle of certainty”** that helps consumers stay grounded amid uncertainty.

At the same time, many are rediscovering joy in tangible, everyday improvements—enhancing their homes, spending quality time with family and cherishing small moments of happiness. They are also enriching their lives through travel, exhibitions, concerts and other immersive experiences that add vitality and meaning.

Figure 6: Consumers are regaining control and meaning in the details of everyday life



Source: Accenture 2025 China Consumer Survey (N=5,000)

Survey question: In the past 12 months, have you started or increased the frequency of the following activities? (Select all that apply)

The enthusiastic embrace of AI for autonomy and convenience

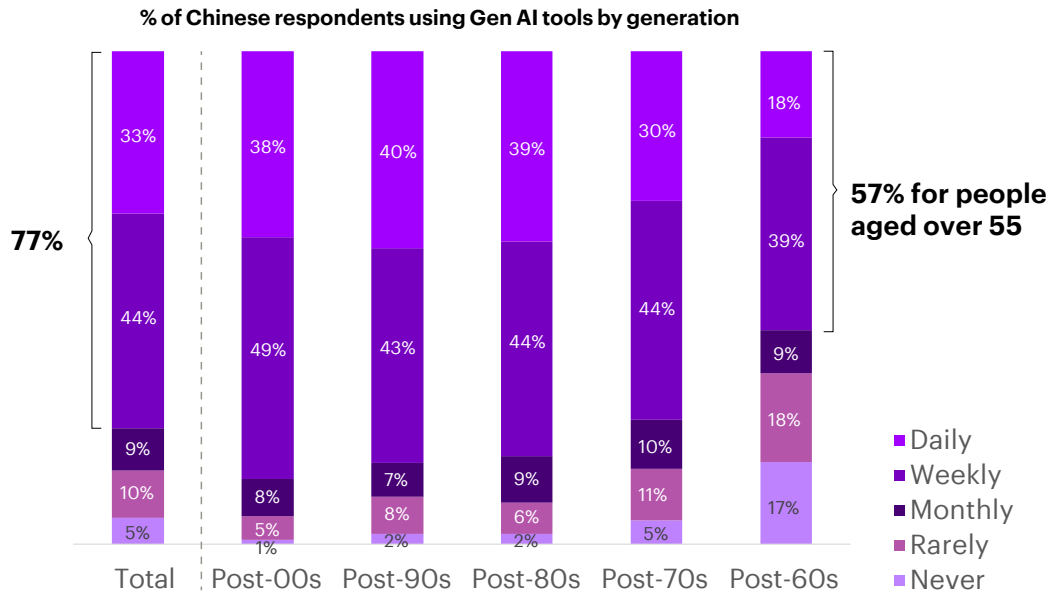
The surge of interest in DeepSeek in early 2025 marked a turning point for AI’s rapid integration into everyday life. Today, 77% of consumers use AI tools frequently (weekly or daily), and even among those born in the 1960s, usage is high at 57% (Figure 7).

The swift spread of AI is quietly reshaping both lifestyles and relationships, largely by removing barriers to information access. In the past, major decisions—such as buying a car, purchasing insurance or planning a trip to an unfamiliar destination—required hours of research and

preparation. Now, AI tools allow consumers to rapidly build knowledge and form decisions, giving many the confidence to explore entirely new domains.

Our survey results highlight the depth of this transformation. When exploring new solutions or looking for ways to improve their lives, 57% of consumers now turn to AI tools—a share that already surpasses all video, sharing and e-commerce platforms, and far exceeds reliance on family and friends (35%).

Figure 7: The rapid adoption of AI tools



Note: All percentages are rounded.
Source: Accenture 2025 China Consumer Survey (N=5,000)
Survey question: How frequently do you use AI tools in learning, work, or daily life? This includes chatbots such as ChatGPT, DeepSeek, Doubao, Yuanbao, Wenxin Yiyao, and Kimi, as well as AI summaries on search engines like Baidu and Bing.

Winning hearts, minds and algorithms

Looking ahead, Chinese consumers are taking a more holistic approach to life—planning for the future while seeking richness and vitality in the present. The good life now balances stability with excitement, safety with self-expression. As they redefine what fulfillment means, consumers are making more deliberate choices about their values, attitudes and daily behaviors. In this context, they have become acutely attuned to brand relevance and integrity—quick to judge whether a brand’s actions align with its words and whether it delivers on its promises.

With the rapid spread of AI, the dynamics of brand–consumer interactions are being fundamentally reshaped. AI has become both a source of inspiration and a decision-making assistant for consumers, influencing how they perceive and prefer brands. In the future, AI may even act directly on behalf of consumers to complete purchase decisions.

For this reason, brands must prepare on two fronts: they need to deliver unique experiences and value in direct interactions with consumers, while also ensuring visibility and differentiation in AI-mediated interactions, where algorithms may serve as proxies for consumer decision-making.

Win loyalty with value

In an era of more rational, deliberate consumption, the quality of products and services remain the foundation of lasting consumer trust. While price promotions can generate short-term sales, they often erode brand equity and condition consumers to buy only at a discount. Enduring loyalty is built through trust, not price. When consumers recognize a brand's quality and identify with its values, emotional connection translates into long-term commitment.

Chinese fragrance brand **To Summer** (观夏) focuses on uniquely Chinese aesthetic expressions, turning its products, retail spaces and social media content into carriers of cultural resonance and emotional experiences. Through thoughtful packaging, store design and product storytelling, To Summer breaks away from the traditional single-sense approach to fragrance. Consumers enjoy an immersive, multi-sensory experience—from touching and using the products, to visiting the stores and engaging with digital content—creating a sense of therapeutic and emotional connection.¹

e.l.f. Cosmetics, a mass-market brand, partnered with Obsess to launch a 3D Virtual Luxe Lounge, a gamified speakeasy experience for Beauty Squad members in the US and UK. Members can explore themed rooms, discover hidden easter eggs, shop exclusive product drops, and access members-only coupons and offers, transforming online shopping into an immersive, loyalty-only adventure.²

Build trust in real-life contexts

In today's fragmented marketing environment, consumers are surrounded by endless streams of information—yet most of it fails to resonate, and often generates indifference or even resistance. What truly leaves a lasting impression is not flashy slogans, but products or experiences that help solve real problems in real-life contexts.

Brands and retailers must strengthen their emotional quotient by learning what truly matters to consumers, and what it takes to build foundational trust with them. Key to that lies in unifying zero-party, first-party and contextual data into smart consumer profiles to power personalized experiences that feel truly authentic.

Vivino recommends wines by analyzing users' past behavior rather than using a traditional survey. It tracks users' wine ratings and reviews to understand their taste preferences. Based on this data, it assigns a personalized match score to each wine, showing how likely a user might enjoy it.³

JD Mall is exploring online-offline integration through immersive retail innovations. The store features themed experience zones—such as an e-sports area equipped with top-tier graphics cards and ergonomic chairs—allowing consumers to test product performance firsthand. Customers can scan in-store QR codes to instantly access detailed product information and order through JD App, enjoy a seven-day no-questions-asked return policy and benefit from a 30-day quality guarantee, reducing post-purchase concerns and strengthen trust.⁴

Harness AI for faster insight and deeper connection

Consumer brands can use data and commerce assets like inventory, pricing and location insights as strategic tools in shaping large language model (LLM) collaborations and enabling seamless transactions. In the meantime, brands can start optimizing for generative engine optimization (GEO)—use natural and specific language, think beyond text and incorporate multi-modal content, monitor which media channels influence visibility for their brand and refine media strategy for LLM relevance.

To bridge the brand-consumer trust gap, brands need to adopt responsible AI practices and strengthen cybersecurity to protect against bad actors, and focus on data protection, consent-based personalization and transparency around how AI-powered interactions are shaped.

Internally, AI is injecting new efficiency and creativity into brand operations. Through AI enablement, brands can not only “see” consumers more clearly, but also provide services with greater speed, precision and personalization.

Noli is a beauty retailer, backed by L’Oréal and powered by Accenture’s AI Refinery™. First-time users can complete a quiz and upload photos of themselves so that Noli can learn about their goals and needs. Noli then provides hyper-personalized routines and product recommendations to help users quickly find and purchase what suits them in a seamless manner.⁵

Mondelez China’s AI assistant “Yi Xiang Jia” analyzes store environment, customer profiles and market performance using image recognition technology. It also breaks down information silos by consolidating internal business knowledge, providing staff and channel teams with practical, actionable recommendations. In distributor visit scenarios, the AI assistant not only highlights key policies but also prompts users to check inventory levels, distribution status, historical sales data and current store performance. Based on this data, it can even generate precise operational plans, such as recommending the number of SKUs to restock. Tools like this equip frontline employees to prepare more thoroughly and execute more efficiently, ultimately enhancing performance across the entire value chain.⁶

Chinese consumers today are reshaping the consumer landscape with their choices and actions. They have become more discerning and rational, no longer blindly following brands or celebrity endorsements, but instead judging a product's value based on personal experience. At the same time, they remain optimistic and pragmatic, reordering life priorities and actively pursuing a life that is more stable, autonomous, balanced and enriched.

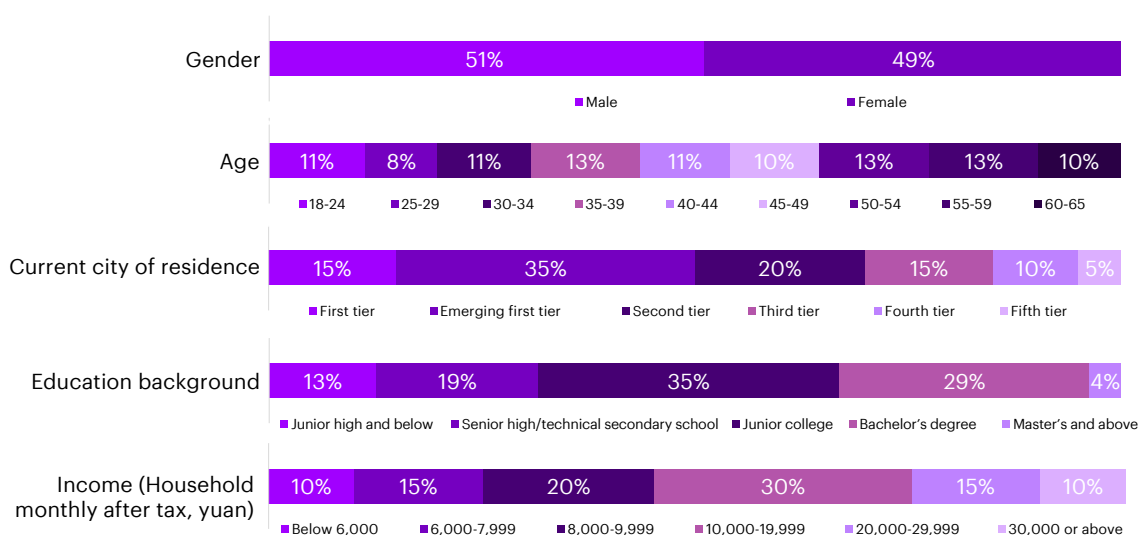
For brands and retailers, this represents both challenge and opportunity. Consumers are setting higher expectations: they are not only looking for products, but for partners who bring reassurance and companionship into their daily lives. Only brands that can truly understand real consumer needs and respond across dimensions of value, emotion and experience will be able to earn lasting trust and achieve sustainable growth in a competitive market.

About this research

Unless otherwise noted, all statistics in this report come from the Accenture 2025 China Consumer Survey. The survey included a sample of 5,000 respondents, conducted between mid-August and early September 2025.

The online survey sample was aligned with China's population structure as defined by the Seventh National Census (October 2020). It covered consumers from Tier 1 to Tier 5 cities, aged 18 to 65. The average completion time was around 10 minutes, and the scope of questions covered consumer lifestyles, mindsets and behaviors.

Accenture designed the research framework and questionnaire. Accenture did not directly collect personal information or consumer data. Instead, a qualified market research firm conducted the survey, and Accenture generated insights based on the aggregated feedback.



Contributors and acknowledgments

Steering Leadership

Christine Wang, Managing Director – Accenture Song Lead, Greater China

Research

Deng Ling, Senior Principal, Accenture Research

He Shan, Associate Manager, Accenture Research

Song Han, Specialist, Accenture Research

Freda Tong, Manager, Accenture Research

Marketing + Communications

Alice Zhang, Manager, Accenture Greater China

Felicity Wu, Specialist, Accenture Greater China

Daisy Wang, Specialist, Accenture Greater China

Editorial

Rebecca Tan, Senior Editor, Accenture Research

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