Chinese consumer trends revisited
One year into the pandemic
Introduction
Introduction

The long struggle with the COVID-19 virus has indelibly impacted the mindsets, lifestyles and behaviors of consumers worldwide. During the pandemic, enterprises have continually innovated and experimented with new initiatives and business models to adapt to a new environment and keep up with rapidly changing customer needs. In China, specifically, we have witnessed new consumer sales channels and trends that came and went swiftly, such as street stall markets, community group buy and many others.

After living with the virus for more than one year, the time is right to ask:

What will the new post-COVID normality be?
And what are the opportunities in the new era?

In this specific piece as part of the Accenture China consumer research series, we try to understand the consumer changes — which are one-off effects of the pandemic and which changes are here to stay. We surveyed a large pool of consumers in urban and suburban locations, across age ranges, globally to monitor the changes in their attitudes, behaviors and habits as they adapt to a new post-COVID reality. Due to accessibility reasons, the Chinese respondents were largely young urban residents.
Consumer evolutions during the pandemic

As we analyze the pandemic in retrospect, more Chinese consumers (57%) feel that the pandemic has caused them to rethink their lives, compared to their global peers (50%).

While price and quality have long been- and remain- the dominant motivation for consumers’ choice around the world, they have lessened in influence on the new post-COVID consumers. Among the consumers who repurposed their lives after the pandemic, our research reveals five distinct purchasing motivations oriented around the desire to feel better and have confidence in the products, services and companies they patronize. These are: health and safety, service and personal care, ease and convenience, product origin, and trust and reputation. This change in mindset and buying habits is creating immense opportunities for companies that respond by resetting strategies and setting new standards for meeting and exceeding their expectations.

The pandemic made me totally revise my personal purpose and what is important for me in life

Weighted importance of factors in consumers’ purchase decisions

Data Source: Accenture Global Consumer Pulse Research 2021
Key trends to stay

From the evolution of the consumers observed, our research uncovered 4 mega trends of consumer behavior and mindset changes amplified and accelerated by the pandemic. Compared to many other countries, China was able to more effectively control the spread of the virus. That meant Chinese consumers were able to live life more normally, as in pre-COVID times. However, even in China, the impacts of the pandemic notably affected how Chinese consumers think and live in the post-COVID normality.

**Behavioral changes**

<table>
<thead>
<tr>
<th>All about health</th>
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<tr>
<td>A greater desire to pursue healthy lifestyles by boosting indoor exercising and selecting healthier food options.</td>
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<th>360° digital focus</th>
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<tr>
<td>An increased dependency on digital channels for daily interactions and activities. As consumers around the world are becoming more comfortable being “home bodies,” they are looking to digital alternatives to meet critical everyday needs — from shopping to healthcare consultations.</td>
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**Mindset changes**

<table>
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<tr>
<th>New focus on sustainability</th>
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<tr>
<td>A keener focus on sustainability in purchasing decisions. However, because Chinese consumers still consider price, quality and convenience their top three purchasing factors, brands need to balance sustainability with these other attributes to most effectively attract consumers to buy.</td>
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<table>
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<th>Open to try anything new</th>
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<tr>
<td>Chinese consumers are highly receptive to new ways of buying and novel commercial interactions. Their curiosity and willingness to experiment may open vast opportunities for businesses to explore.</td>
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</table>

Throughout the year, we also saw a number of companies launch innovative initiatives aimed at seizing the opportunities presented by these trends — everything from evolving brand DNA and values to rethinking routes to market to incubating new business models. They are on the right course. In order to meet new customer expectations and win in the post-COVID normality, they need to align with the new trend imperatives.
All about health
Unsurprisingly, as the pandemic spread globally, health became the top priority for people worldwide. Chinese consumers are no different. Health has become main area of concern throughout the pandemic and is expected to remain a top priority.

- **91%** of Chinese respondents claim that “taking care of my health” is a permanent change to their lifestyles.

- **87%** of Chinese respondents express that personal health is their top priority, while only 76% of global respondents see health as their top priority.

**Chinese consumers consider physical health to be a higher priority than mental health:** 78% of Chinese respondents state that physical health will remain their top priority over the next three to six months.

Chinese consumers are pivoting towards a healthier lifestyle in two key ways:

1. Engaging in more indoor exercise
2. Selecting healthier diet options

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**Personal health as a top 3 priority**

- **87%** in China
- **76%** globally (excluding China)

**Health as a top priority in the next 3-6 months**

- **78%** in China
- **65%** globally (excluding China)

- **29%** in China
- **38%** globally (excluding China)

Data Source: Accenture COVID-19 Pulse Survey Wave 8 (June 30th – July 5th 2020)

Data Source: Accenture COVID-19 Pulse Survey Wave 9 (November 26th – Dec 10th 2020)
Engage in more indoor exercise

Compared to other countries, Chinese consumers are significantly more dedicated to achieving a healthier mind and body. This mindset created high demand for various at-home exercising solutions — from easy-to-access exercise videos on social media platforms to sophisticated interactive solutions.

When asked about the activities they’re likely to engage in over the next six months, 83% of Chinese respondents say they are likely to spend more time exercising at home.

We also observed a sharp spike in traffic for “exercise and fitness”-related videos and posts from key opinion leaders (KOLs) on social media platforms.

### Activities likely to engage in over the next 6 months

- **Spending more time on self-care & mental wellbeing**
  - China: 85%
  - Global (excluding China): 65%

- **Exercising at home**
  - China: 83%
  - Global (excluding China): 57%

Data Source: Accenture COVID-19 Pulse Survey Wave 9 (November 26th – Dec 10th 2020)
Selecting healthier diet options

In their efforts to be healthier, Chinese consumers are also placing greater importance on selecting healthy food options, balancing their intake of nutrition, and reducing sugar and fat. During the pandemic, we also observed a surge in popularity of low-sugar and low-fat foods and beverages.

- **86%** of the Chinese respondents express that they intend to shop more health consciously (US 65%, global 66%)

- **84%** of Chinese respondents claim that they’ve changed their diet since the pandemic (US 61%) by consuming more organic fruits and vegetables and less sugar and fat

- **79%** of Chinese consumers believe that brands should make it easier to find and buy healthy products

### Understanding of healthy consumption

<table>
<thead>
<tr>
<th>Statement</th>
<th>China</th>
<th>Global (excluding China)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brands should make it easier for me to buy/consume healthily</td>
<td>79%</td>
<td>68%</td>
</tr>
<tr>
<td>Government should promote healthy consumption</td>
<td>78%</td>
<td>60%</td>
</tr>
<tr>
<td>I know which products are healthy, and which are not</td>
<td>77%</td>
<td>76%</td>
</tr>
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</table>

**Data Source:** Accenture COVID-19 Pulse Survey Wave 9 (November 26th – Dec 10th 2020)

### Likely to shop health consciously

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<td>66%</td>
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**Data Source:** Accenture COVID-19 Pulse Survey Wave 10 (February 25th – March 5th 2021)
FITURE
Delivering the next generation of home fitness solutions in the new post-COVID normality

Fiture is a smart, interactive workout mirror that enables personalized training experiences. Since its first launch during the pandemic in October 2020, Fiture has received high praise from consumers and ~300 million USD in funding from high-profile investors.

Innovation

Fiture provides customers with a one-stop home fitness solution, combining hardware, content and services, and artificial intelligence (AI).

- **Hardware**: Minimalistic design with a 4k display screen embedded in a mirror
- **Content and Services**: Subscriptions for personalized training plans by award-winning trainers, based on personal body stats
- **AI-Powered**: Motion sensors correct users’ movements

Data Source: Accenture analysis
KEEP
Staging a sustainable recovery with new innovations

Keep, originally an app for workout tracking and tutorials, was on a downward slope by 2019. The company was having trouble retaining and converting paying users and, consequently, had to downsize hundreds of employees. As the pandemic took hold, Keep quickly launched a series of new innovations, which successfully revived the platform to reach six million daily active users (DAUs) in 2020, a 60%+ increase from the previous year.

New Innovations

- **Live streaming workout sessions**: Attracted 56.5 million participants per session in just one week from its initial launch in early February 2020
- **Smart spin bikes and wristbands**: Provided users personalized training experiences, with smart resistance control and smart intensity recommendations based on user performance
- **Workout with friends**: Offered competitive rankings and “PK” challenges with other users

Data Source: Accenture analysis
Boohee
Successfully transforming products and channels

In 2008, Boohee was launched as an app to help consumers track their caloric intake, weight records and metabolic data calculations. Like many other toolkit applications, Boohee struggled to monetize its offerings.

Boohee’s transformation
Boohee launched a series of healthy snack items catering to specific Chinese tastes in 2018, mainly targeting Boohee app users.

Key products:
1. Easy Fun: Healthy snacks
2. Easy Fan: Healthy ready-to-cook meals
3. Easy Ace: Healthy meal subscriptions
4. Other health and nutrition consultation services and food scales

Business value
The new products became highly popular among consumers in 2020 when Boohee expanded to other online sales channels. That move resulted in a 200% increase in sales in 2020, compared to 2019. The company is expected to reach 1.5 billion CNY annual sales in 2021.

New online sales channel expansion:
• A WeChat mini-program was developed as a primary sales channel, yielding sales of more than 10 million CNY in 2020 across 200+ WeChat community groups
• The company expanded its e-commerce presence (Tmall, JD, PDD and other platforms) through celebrity live streaming events

Data Source: Accenture analysis
360° digital focus
Rise of global “Homebodies”

One of the most direct impacts COVID-19 has had on our lifestyles is the limitations placed on where and how people work, socialize, and engage in recreational activities. The global call for people to stay home as much as possible gave rise to a legion of global “homebodies.”

- 52% of Chinese respondents expect to work from home at least once a month after the pandemic is over (58% global); that’s double the number of people expecting to work from home when asked in early 2020.

- Home is the top place for socialization for Chinese and global respondents.

### Expected frequency to work from home once the pandemic is over

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<th></th>
<th>China</th>
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<tbody>
<tr>
<td>Never</td>
<td>27%</td>
<td>24%</td>
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<tr>
<td>A few times a year</td>
<td>20%</td>
<td>19%</td>
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<tr>
<td>Once a month</td>
<td>17%</td>
<td>12%</td>
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<tr>
<td>Once or twice a week</td>
<td>24%</td>
<td>17%</td>
</tr>
<tr>
<td>At least three days</td>
<td>11%</td>
<td>29%</td>
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</tbody>
</table>

Data Source: Accenture COVID-19 Pulse Survey Wave 10 (February 25th – March 5th 2021)

### Top 5 places to socialize in the next 6 months

- In my or another’s home: 67% (60% Global), 70% (64% Global)
- Connecting virtually with friends: 64% (62% Global)
- At work: 31% (31% Global), 44% (42% Global)
- Parks or other outdoor spaces: 39% (45% Global)
- In restaurants: 31% (29% Global)

Data Source: Accenture COVID-19 Pulse Survey Wave 9 (November 26th – Dec 10th 2020)
As consumers around the world have spent more time at home and become comfortable “home-bodies,” they have turned to digital and virtual alternatives to meet their critical everyday needs, such as shopping, health, consultations, learning and entertainment. As the demand for digital everything rapidly accelerated, it released vast opportunities for platforms and enterprises.

Key digital accelerators

- Expansion of online shopping platforms
- Expansion of categories of purchases on O2O platforms
- Emergence of virtual consultation
Expansion of online shopping platforms

With more time spent online browsing through social media and other content, **71% of Chinese consumers are willing to make purchases via social media platforms directly.** That’s significantly higher than their global peers (42%).

- Among the younger generation of Chinese consumers (aged 18-39), approximately **80%** indicate they are likely to make social media purchases.

During the pandemic, many of the top Chinese social media platforms launched e-commerce capabilities.

**WeChat**, China’s top social communication platform has successfully transformed itself into a unique e-commerce platform with brand-owned mini-programs. Such programs attracted over 400 million DAUs and generated 1.6 trillion CNY in transaction value in 2020, a year-on-year increase of more than 100%.

**Douyin**, China’s top viral short-video app also launched a series of KOL and celebrity live stream commerce events, which yielded 500 billion CNY in gross merchandise value in 2020.

**Likely to shop via social media platforms**

- China: 71%
- Global (excluding China): 42%

Data Source: Accenture COVID-19 Pulse Survey Wave 9 (November 26th – Dec 10th 2020), Accenture analysis
Expansion of purchase categories on online-to-offline (O2O) platforms

During the lockdown, consumers exhibited a strong desire for fast access to all their essential products such as fresh food, medicine and more. Their demand led to a huge boost for China’s O2O platforms, many of which expanded their product categories and accelerated their delivery speed to less than 30 mins in many cities.

Alibaba’s omnichannel supermarket, Hema, reported that orders were up 220% year over year during the Chinese New Year, when the pandemic started spreading.

Dingdong Maicai is a fresh food e-commerce platform that allows users to place orders online and get fresh food delivered to their doorsteps. The platform’s most popular product categories include vegetables, fruits and seafood. While fresh produce e-commerce is reputed to be a difficult business, Dingdong Maicai offers fast delivery services within 30 minutes by running hundreds of local warehouses and using big data to predict future orders. Dingdong Maicai expanded aggressively in 2020, extending its operations to 27 cities. Receiving more than 850,000 orders daily, its monthly revenue now exceeds 1.5 billion CNY. The Chinese online fresh food sector is expected to reach 1.27 trillion CNY by 2025.
Emergence of virtual consultation

The pandemic subverted the way many activities were carried out, and people had to quickly shift from face-to-face interactions to virtual engagement. As people adapted to connecting with their family and friends virtually, other necessary “stranger” communications, such as health appointments, shifted to virtual platforms as well.

- **88%** of Chinese consumers have received virtual health consultations (with 63% taking advantage of virtual healthcare at least once a month). Only 57% of global consumers have experienced virtual health appointments.

- **98%** of Chinese consumers claim that they will continue to use virtual health appointments after the pandemic subsides, and 70% expect to use it more than once a month.

- **83%** of Chinese consumers have experienced non-health-related virtual consultations*, and **91%** expect to continue using non-health virtual consultations after the pandemic subsides.

### Have used virtual health appointments
- **88%** (China)
- **57%** (Global)

### Expect to use virtual health appointments once pandemic subsides
- **98%** (China)
- **92%** (Global)

### Have used non-health virtual consultations
- **83%** (China)
- **47%** (Global)

### Expect to use non-health virtual consultations once pandemic subsides
- **97%** (China)
- **91%** (Global)

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*Non-health virtual consultation refers to one-on-one video or call product consultation services, e.g., BMW WeChat video consultation services in China*

Data Source: Accenture COVID-19 Pulse Survey Wave 10 (February 25th – March 5th 2021)
Eleme
24 hours, 24 minutes medicine delivery

Eleme is one of China’s Top 2 food delivery platforms owned by Alibaba. In 2020, the platform initiated an aggressive strategy to expand product categories and delivery regions.

Innovation

A key category of focus is pharmaceutical medicine. Eleme partnered with most of the large players in the healthcare industry, such as Sinopharm, Pfizer, GSK and many others to enable 24–60-minute over-the-counter (OTC) and prescription medicine delivery services to 700 counties in China.

Alibaba also enabled easy access to online health diagnoses and consultation services with pharmacists and doctors to support consumers in getting the medical help they need.

Data Source: Accenture analysis
New focus on sustainability
New focus on sustainability

Various factors of the pandemic may have led Chinese consumers to place a higher importance on sustainability and to make more environmentally friendly choices than ever before.

- 77% of Chinese respondents claim that the environment is becoming a more important priority for them, while only 53% of global respondents express the same shift in priorities.

While the majority of Chinese consumers believe they have a good understanding of what kind of actions and choices are environmentally responsible, they still believe that the government and businesses should play a larger role in promoting sustainable and ethical consumption.

- 83% of Chinese respondents believe that brands should do more to make it easier to buy and consume sustainably.

- 55% of Chinese respondents note that a company’s sustainable and ethical values will be more important to them after the pandemic (global 41%).

Environment is becoming an important priority

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<td><strong>77%</strong></td>
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<td>53%</td>
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Data Source: Accenture COVID-19 Pulse Survey Wave 10 (February 25th – March 5th 2021)

Sustainability and ethical values of companies become more important after the pandemic

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<tr>
<td><strong>55%</strong></td>
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<td>41%</td>
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Data Source: Accenture COVID-19 Pulse Survey Wave 8 (June 30th – July 5th 2020)

Understanding of sustainable consumption

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<tr>
<td><strong>Brands should make it easier for me to buy/consume sustainably</strong></td>
<td>83%</td>
<td>69%</td>
</tr>
<tr>
<td><strong>Government should promote more sustainable/ethical consumption</strong></td>
<td>63%</td>
<td>80%</td>
</tr>
<tr>
<td><strong>I know which items I can and can’t recycle</strong></td>
<td>72%</td>
<td>67%</td>
</tr>
<tr>
<td><strong>I know which brands are sustainable/ethical, and which are not</strong></td>
<td>51%</td>
<td>68%</td>
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Data Source: Accenture COVID-19 Pulse Survey Wave 10 (February 25th – March 5th 2021)
Sustainability is becoming a key factor in purchasing decisions

Sustainability has trended to become the fourth most important attribute for Chinese consumers when choosing which brands and products to buy. While the sustainability attribute has become increasingly important, price, quality and convenience remain the top 3 attributes for Chinese consumers. Hence, sustainability values need to be well balanced with the other attributes in order to most effectively attract consumers to buy. Various local Chinese businesses have successfully launched innovative initiatives and new business models in recent years to capture the growing demand for sustainable and ethically responsible brands, as well.

• 83% of Chinese consumers express that they will make more sustainable/ethical purchases (global 64%)

Attributes considered when choosing which brands to buy (percentage indexed to price)

- Price: 100%
- Quality: 96%
- Convenience: 93%
- Sustainability benefit: 64%
- Brand experience: 69%
- Functional benefit: 46%
- Emotional benefit: 39%
- Social benefit: 39%

Make environmentally friendly/ethical shopping choices in the next 6 months

83% (China) vs 64% (Global, excluding China)

Data Source: Accenture COVID-19 Pulse Survey Wave 9 (November 26th – Dec 10th 2020)
Saturnbird
Driving fast growth with gamified sustainability branding

Saturnbird is a freeze-dried instant coffee brand, with a mission to protect the environment by using recyclable materials.

Innovation
Starting in 2019, Saturnbird launched its first “voyage home project,” which uses gamification to drive participation in the company’s used coffee container recycle program. “Voyage home projects” are launched twice a year. Each project season has its own theme, and consumers make appointments on their WeChat mini-program to trade in their used containers at specific online and offline locations for special Saturnbird-designed merchandise.

In the most recent “voyage home project” at the end of 2020, Saturnbird collected approximately 1.4 million used coffee containers from 20,000 participants, doubling the outcome of the previous season that occurred five months prior.

Business value
Saturnbird’s recycling program motivated consumers to buy, consume and gather coffee containers. In fact, the recycling program attracted so many consumers that Saturnbird became the first Chinese coffee brand to obtain the No.1 coffee sales rank in Tmall’s Double 11 in 2019, with 40 million+ CNY. The momentum continued in 2020, with sales topping 100 million CNY.

Data Source: Accenture analysis
Duozhuayu
Sustaining an innovative secondhand book-trading platform


Innovation

Duozhuayu applies a consumer-to-business-to-consumer (C2B2C) model. By collecting secondhand books from consumers, re-conditioning and repackaging them, and then reselling them to other consumers, Duozhuayu is providing a “new” book-buying experience. The company also puts a lot of efforts in building online and offline user and community operations with events, frequently updated book recommendations and discussion forums.

Business value

As of July 2020, Duozhuayu generated annual sales revenue of more than 100 million CNY from average daily sales of 2,000 books online. Nowadays, Duozhuayu is also actively expanding its categories of products and offline channels and has opened its first two physical stores in Beijing (October 2019) and Shanghai (December 2020).

Data Source: Accenture analysis
Open to try anything new
Open to try anything new

In contrast to consumers in other countries, Chinese consumers are eager to participate in new ways of collaborating with companies, especially in the areas of product innovation, crowdfunding and experience sharing. New modes of collaboration include recasting the role of consumers as sellers, distributors, makers and marketers. Such roles are highly accepted in China, marking potential new opportunities for businesses to explore.

Chinese e-commerce platforms and businesses have piloted new business models and new communication projects to capture consumer feedbacks and ideas for brands.

Ways consumers would like to collaborate with companies

- **Consumer involvement in R&D/innovation**: Company asks consumers to submit their ideas for a product or service and the company will pick the best product/service ideas and bring them to market; consumers provide feedback or help test products currently in development.

- **Consumer as investor**: Consumers invest their money in a proposed product idea or new business, e.g., crowdfunding platforms or other programs.

- **Consumer experience sharing**: Consumers leave reviews, conduct in-store audits or complete surveys on a company – for example, seeing if a product is on shelf, if the shopping experience is pleasant, or describing how they use a product or shop for a service.

- **Consumer as seller**: Consumers are not an official employee of a company, but they sell their products.

- **Consumer as distributor**: Consumers deliver products on a freelance basis.

- **Consumer as maker**: Instead of buying a ready-made product, consumers make the product at home – for example, DIY makeup; they may also make products to sell to others via platforms.

- **Consumer as marketer**: Consumers are not an official employee of a company, but they market their products via social media.

Prioritized methods of collaboration with companies:

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7. **Consumer as marketer**: Consumers are not an official employee of a company, but they market their products via social media.
Open to try new ways of buying

Chinese consumers also are highly receptive to new business models and new ways to buy products and services, compared to consumers from other countries. Chinese consumers have different preferences for how they buy in different product categories, however. Replenishment subscriptions, “surprise me” subscriptions and smart re-ordering are their top preferences across many categories.

**Replenishment subscription**

Automatically ordering products and having them delivered on a consistent schedule is the most preferred way Chinese consumers like to make their purchases in numerous product categories, including personal care (70%), health and wellbeing (57%), food (75%) and household basics (77%).

- **Personal care**: 70%
- **Health and wellbeing**: 57%
- **Food**: 75%
- **Household basics**: 77%

**“Surprise me” subscriptions**

Having an expert pick out items you might like and delivering them on a consistent schedule is second most preferred way Chinese consumers like to purchase goods in some product categories, including personal care (63%), clothing & accessories (60%), and food (64%).

- **Personal care**: 63%
- **Clothing & accessories**: 60%
- **Food**: 64%

**Smart reordering**

Having your smart appliances detect when you are running low on certain supplies and automatically reordering for you (possibly at a discounted price) is a highly preferred purchase method by Chinese consumers in food (65%) and household basics categories (63%).

- **Food**: 65%
- **Household basics**: 63%

**Upgrade me**

Paying an annual fee allows you to return old models for the newest model. 74% of Chinese consumers are willing to purchase consumer electronics in this way.

- **Consumer electronics**: 74%

Data Source: Accenture COVID-19 Pulse Survey Wave 9 (November 26th – Dec 10th 2020)
TMall U-First
Incentivizing consumers to provide feedback via sample distribution

Tmall U-first is a sub-section of China’s top e-commerce platform, TMall. Tmall U-first aims to help brands acquire new customers by providing free or low-priced samples.

Innovation

Tmall U-first provides an online and offline channel for consumers to try products before making a purchase, thereby eliminating the frustration of purchasing products they do not like. As its main offline channel, Tmall U-first installed over 20,000 vending machines in 40 major cities across China in shopping malls, convenience stores, universities and hospitals, etc. Consumers are encouraged to leave feedback on their samples in all channels, which is shared with the brands for future product development and marketing analyses. More than 100 million sample products were distributed in 2020.

Data Source: Accenture analysis
OnePlus IDEAS program
Co-creating with the user community

OnePlus, the smart phone brand with the motto “Never Settle” aims to push the limits of technology to empower the world and ignite users’ passions by providing them the best smart phone in the world.

Innovation

OnePlus launched its IDEAS program in 2020 to bridge the gap between the OnePlus global user community and the OnePlus team. The co-creation program encourages users to submit ideas for community discussion and review. Then the OnePlus development team reviews and selects the top ideas for implementation. The program received 12,000+ ideas in the two rounds launched in 2020.

Features adopted from the IDEAS program:

1. Always On Display
2. Fingerprint lock for hidden pictures in Gallery
3. Play sound when battery is fully charged
4. Folders within App Drawer
5. Adding features in Zen Mode

Data Source: Accenture analysis
Three new imperatives
To win in the post-COVID-19 era, businesses need to transform to accommodate these four key trends with three actions

Throughout the year, we also followed and witnessed numerous success stories of businesses launching innovative initiatives aimed at seizing the opportunities presented by these trends—everything from evolving brand DNA and values to rethinking routes to market to incubating new business models. In order to meet new customer expectations and win in the post-COVID normality, they need to align with the new trend imperatives.

**Key trends**

1. **All about health**
   An amplified desire to pursue healthy lifestyles.

2. **360° digital focus**
   An increased dependency on digital channels for daily interactions and activities.

3. **New focus on sustainability**
   A keener focus on sustainability in purchasing decisions.

4. **Open to try anything new**
   A willingness to embrace new ways of buying from and interacting with businesses.

**Key actions**

1. **Evolve the brand DNA and values**
   Stay very close to consumers by offering desired health and sustainable brand values and by continually evolving products and consumer experiences.

2. **Rethink routes-to-market**
   Be agile, engage with new digital ecosystems, and win hearts of consumers across all relevant touchpoints.

3. **Incubate new business models**
   Reimagine product and service offerings to capture new consumer segments and constantly remain “fresh” in the eyes of consumers.
From March 2020 to March 2021, Accenture conducted surveys in 10 waves to track changes in consumer sentiments and behaviors. The surveys included up to 12,487 consumers per wave in 15 markets around the world.

### Accenture’s global COVID-19 consumer pulse research

<table>
<thead>
<tr>
<th>Wave</th>
<th>Time conducted</th>
<th>Countries and # of respondents*</th>
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<tbody>
<tr>
<td>1</td>
<td>Mar 19th-25th 2020</td>
<td>China: 210, Global 3,103</td>
</tr>
<tr>
<td>2</td>
<td>Apr 2nd-6th 2020</td>
<td>China: 202, Global: 2,872</td>
</tr>
<tr>
<td>3</td>
<td>Apr 17th-27th 2020</td>
<td>China: 651, Global: 6,989</td>
</tr>
<tr>
<td>4</td>
<td>May 5th-11th 2020</td>
<td>China: 608, Global: 6,616</td>
</tr>
<tr>
<td>5</td>
<td>May 20th-24th 2020</td>
<td>China: 603, Global: 7,264</td>
</tr>
<tr>
<td>6</td>
<td>June 2nd-8th 2020</td>
<td>China: 615, Global: 8,224</td>
</tr>
<tr>
<td>7</td>
<td>June 16th-22nd 2020</td>
<td>China: 616, Global: 8,236</td>
</tr>
<tr>
<td>8</td>
<td>June 30th-July 5th 2020</td>
<td>China: 622, Global: 7,907</td>
</tr>
<tr>
<td>9</td>
<td>Nov 26th-Dec 10th 2020</td>
<td>China: 1,020, Global: 11,467</td>
</tr>
<tr>
<td>10</td>
<td>Feb 25th-Mar 5th 2021</td>
<td>China: 820, Global: 8,833</td>
</tr>
</tbody>
</table>

* Note: Global countries included: United States, Australia, Brazil, Canada, France, Germany, India, Italy, Japan, Mexico, South Korea, Spain, United Arab Emirates, United Kingdom (excluding China)
Accenture also conducted its 16th annual Global Consumer Pulse Research to gain an understanding of global consumers’ preferences, beliefs and behaviors. The online survey of 25,444 consumers age 18+ in 22 countries was designed to identify how consumer expectations are evolving — and how companies can capitalize on that evolution to achieve new levels of growth and competitive agility. Fieldwork was conducted between December 2020 and February 2021.
Accenture 2021 China Consumer study steering committee

Robert Hah
Managing Director, Strategy & Consulting Lead, Accenture Greater China

Post-COVID-19 pulse report executive sponsor

Eric Hor
Managing Director, Consumer and Retail Industries Lead, Strategy & Consulting, Accenture Greater China
eric.hor@accenture.com

Research and Author

Angela Teng
Director - Consumer Industries Strategy & Consulting, Accenture Greater China
angela.teng@accenture.com

Program Management

Alice Zhang
Manager, Marketing & Communications, Accenture Greater China

About Accenture

Accenture is a global professional services company with leading capabilities in digital, cloud and security. Combining unmatched experience and specialized skills across more than 40 industries, we offer Strategy and Consulting, Interactive, Technology and Operations services—all powered by the world’s largest network of Advanced Technology and Intelligent Operations centers. Our 624,000 people deliver on the promise of technology and human ingenuity every day, serving clients in more than 120 countries. We embrace the power of change to create value and shared success for our clients, people, shareholders, partners and communities.

The company has been operating in Greater China for over 30 years. Today, it has around 19,000 people servicing clients across the region with offices in the cities including Beijing, Shanghai, Dalian, Chengdu, Guangzhou, Shenzhen, Hangzhou, Hong Kong and Taipei. As a trusted Partner of Choice for digital transformation, Accenture is bringing more innovation to the business and technology ecosystems and helping Chinese enterprises and the government to embrace digitization and enhance global competitiveness to succeed in the new era.

For more information about Accenture, please visit its corporate homepage www.accenture.com and its Greater China homepage www.accenture.cn.

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