



From Speed to Strategy: Understanding China's “Consumption New Normal”

—Insights from Instant Retail and Consumer
Behavior Data

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Outline

- A Brief Overview: China's "New Normal" in Consumption
- A Research-backed Discussion : How Instant Retail is Reshaping Chinese Consumer Behavior

The “New Normal”

– A Shift in Growth and Mindset

	Total annual consumption (in trillions of RMB)	Total number of households (in millions)
2025 Survey Results	+2.3%	+0.9%
2024 Survey Results	+2.4%	+0.4%

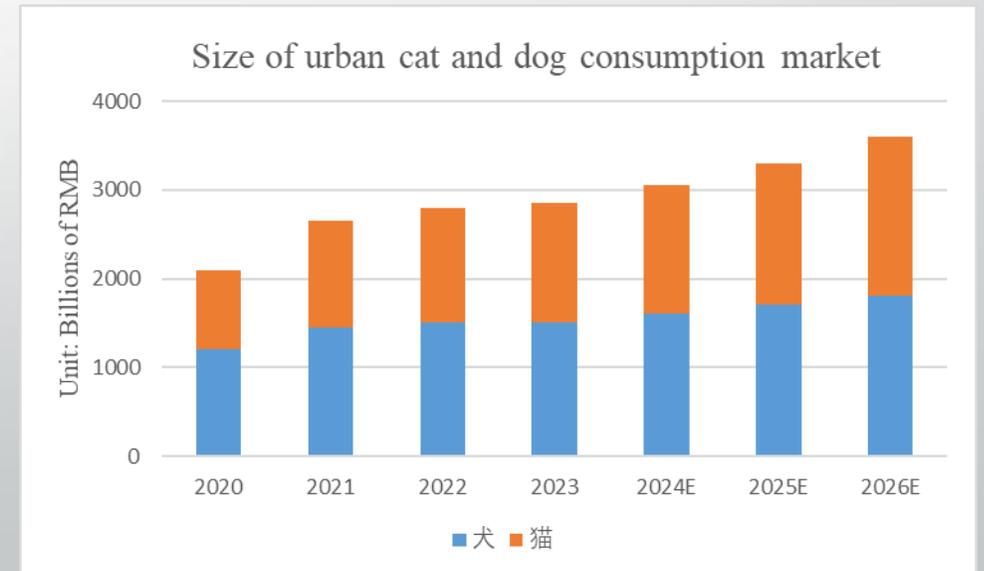
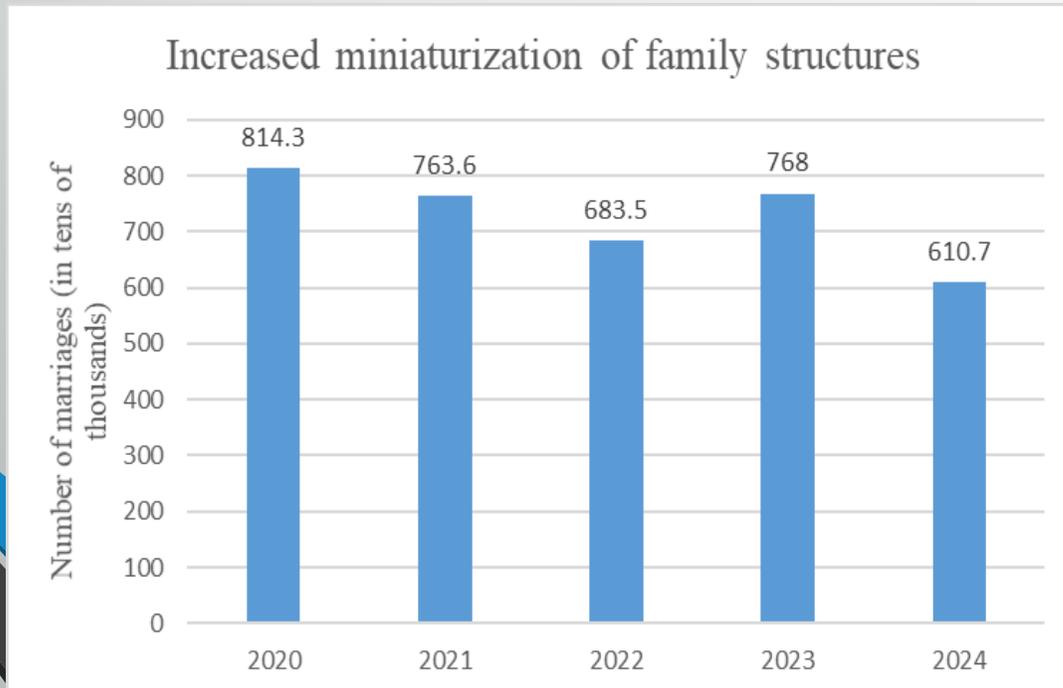
Source: McKinsey & Company; estimates based on data from Oxford Economics.

The “New Normal” – A Shift in Growth and Mindset

- 1. Demographic & Lifestyle Changes

Aging population; Single-person households; Growing pet economy

Emotional connection Driving purchasing choices



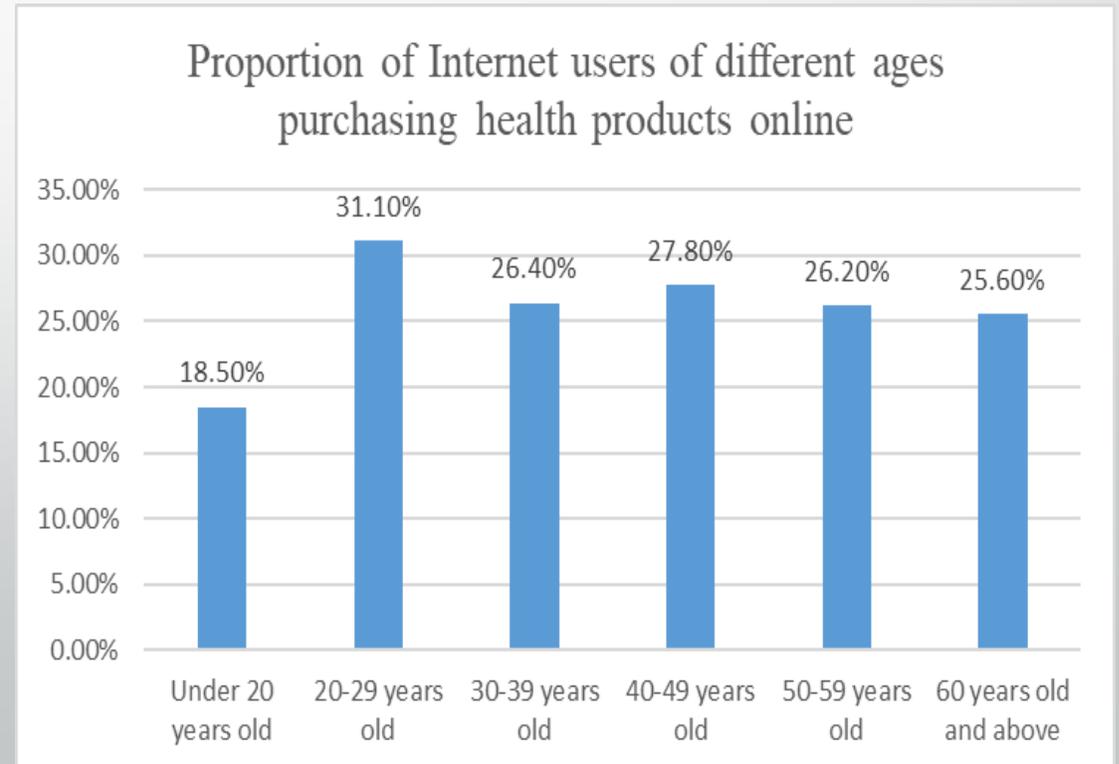
The “New Normal”

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- 2. Health & Sustainability Awareness

Rise of organics, wearables, digital health

Cross-generational trend



The “New Normal”

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- 3. Consumers are placing increasing value on emotional identity, and at the heart of this trend is the rise of the IP economy

IP collaboration, identity-driven shopping



Rise of Instant Retail

- It refers to a model of online ordering and rapid, local delivery, often within an hour.
- Its growth has been explosive:
- In 2023, China's instant retail market surpassed RMB 500 billion, growing over 30% YoY.
- Platforms like Meituan and JD Daojia serve tens of millions of active users monthly.
- According to the China Chain Store Association, over 60% of physical supermarkets now offer instant delivery services.



it's a paradigm shift in how consumers plan, purchase, and receive everyday goods.



Core question today:
How Instant Retail is Reshaping Chinese Consumer
Behavior?

Research Setup

- Partners: JD Daojia + Huaguan Supermarket
- Dataset:
 - Over 1 million transaction records
 - 1,650 households
 - Cross-channel behavior (online & offline) , Consumer and store characteristics

消费者是否使用线上到家平台进行购买* 门店是否引入线上到家平台	零食饮料	主食粮油	生鲜蔬果	日用百货	服装鞋帽
系数	0.256***	0.251**	0.238***	0.276***	-0.120
标准误	(0.096)	(0.103)	(0.092)	(0.103)	(0.151)
消费者特征	控制	控制	控制		
消费习惯	控制	控制	控制		
门店特征	控制	控制	控制		
消费者对门店的评价	控制	控制	控制		
常数项	4.165***	2.160***	2.275***		
	(0.402)	(0.427)	(0.396)		
样本量	2473	2350	2405		

消费者在线上到家平台的消费支出

商品品类		主食粮油	生鲜蔬果	日用百货
年龄大于 55 岁	系数	-0.106	-0.021	-0.207
	标准误	(0.188)	(0.174)	(0.225)
年龄小于 55 岁	系数	0.383***	0.342***	0.202**
	标准误	(0.123)	(0.103)	(0.116)
样本量		2337	2376	2046
商品品类		主食粮油	生鲜蔬果	日用百货
女性	系数	0.306**	0.333***	0.366***
	标准误	(0.123)	(0.101)	(0.120)
男性	系数	0.286	0.118	-0.023
	标准误	(0.212)	(0.192)	(0.201)
样本量		2341	2376	2046

消费者在线下传统门店的消费支出

商品品类		零食饮料	生鲜蔬果
习惯开车购物	系数	0.336***	0.273***
	标准误	(0.099)	(0.102)
采用其他方式购物	系数	-0.157	0.080
	标准误	(0.143)	(0.152)
样本量		2341	2376

注：括号内为标准误，*、**和***分别表示在10%、5%和1%的显著水平上显著。

注：控制其余控制变量。括号内为标准误，*、**和***分别表示在10%、5%和1%的显著水平上显著。

Key Findings

- Instant retail significantly increases consumer spending in key high-frequency categories such as fresh produce, grains and oils, daily necessities, and snacks and beverages.
- The impact is not significant for experience-heavy items like apparel.
- This suggests that convenience goods are the main beneficiaries of this model—not luxury or experiential products

Key Findings

- Consumers under 55, especially women, are more likely to use instant retail for heavy, time-sensitive, and essential goods.
- These consumers value time savings, flexible shopping hours, and physical effort reduction—features that instant retail directly enhances.
- Interestingly, consumers who are also car owners and use instant retail still prefer in-store shopping for specific items like snacks and beverages—suggesting hybrid behavioral models.
- These findings reveal a nuanced, layered impact—instant retail serves diverse needs, not a single user archetype.

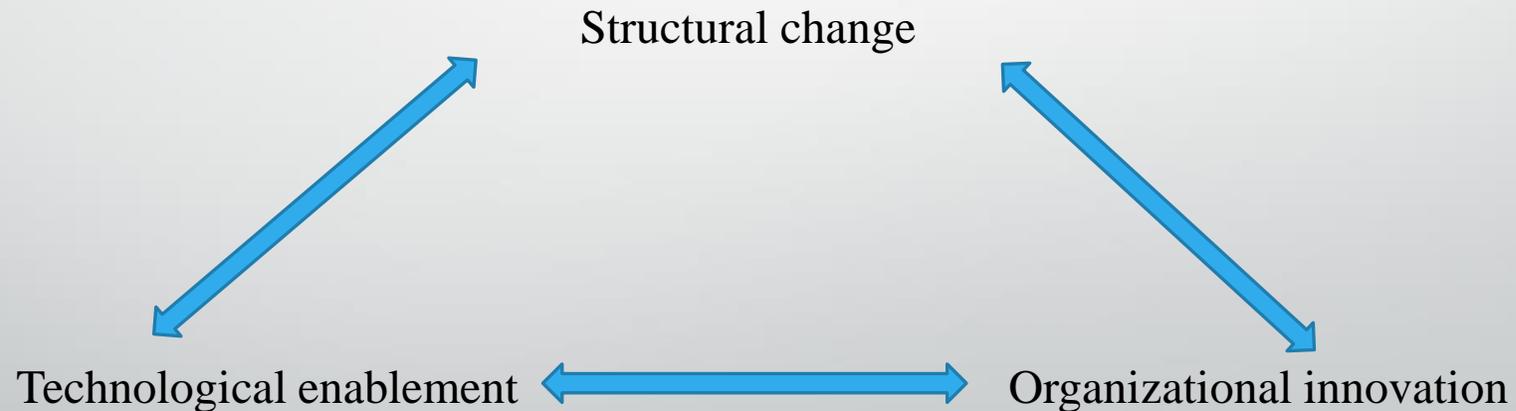
Interpreting the Mechanisms

- Our research suggests that when retail becomes digitally embedded and spatially responsive, it fosters higher consumer engagement, broader access, and stronger spending resilience—even in the face of macroeconomic uncertainty.
- This is the essence of China’s “New Normal” in consumption:

It’s not about returning to high-speed growth, but about building adaptive, inclusive, and digitally enabled ecosystems that respond to the evolving needs of diverse consumers.

Conclusion – A Triangular Framework of China's Consumption Resilience

More importantly, consumption does not stand alone. Revitalizing demand is not just about stimulus, but about building a resilient industrial foundation that supports long-term momentum.



- In short, the future of consumption is not just about speed—it's about strategy.

Thank you for your attention

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