

How young Chinese are finding themselves

May 2023

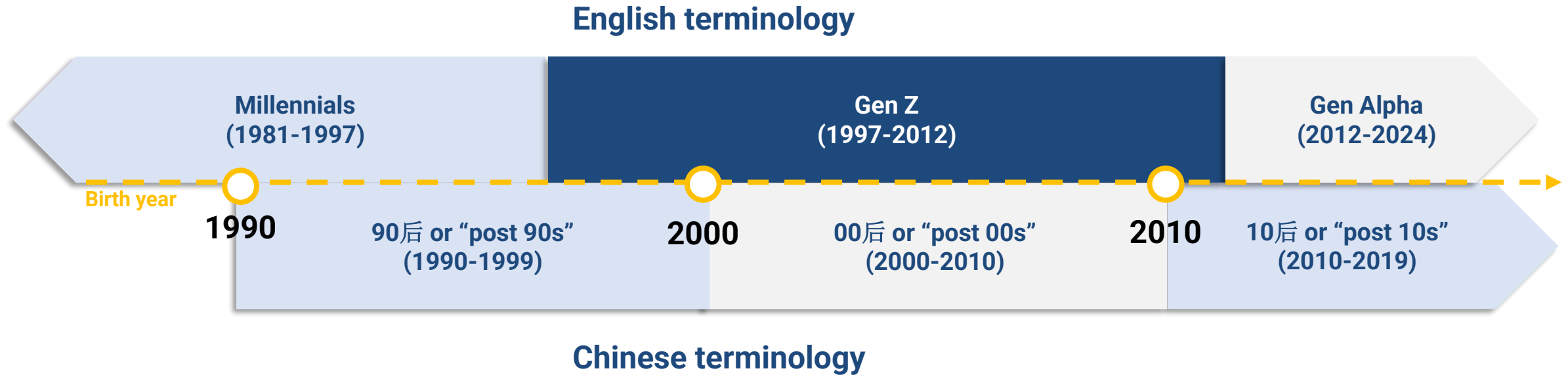


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Must know Chinese terms: How “young adults” are defined in China

As our research combines both Chinese and foreign sources, it is important to define the terminology used in both kinds of sources to understand this report.



1

Consumer trends of 2023

The shift in workplace after the end of Zero-COVID



Photo: Xiaohongshu user @介入设计便利店

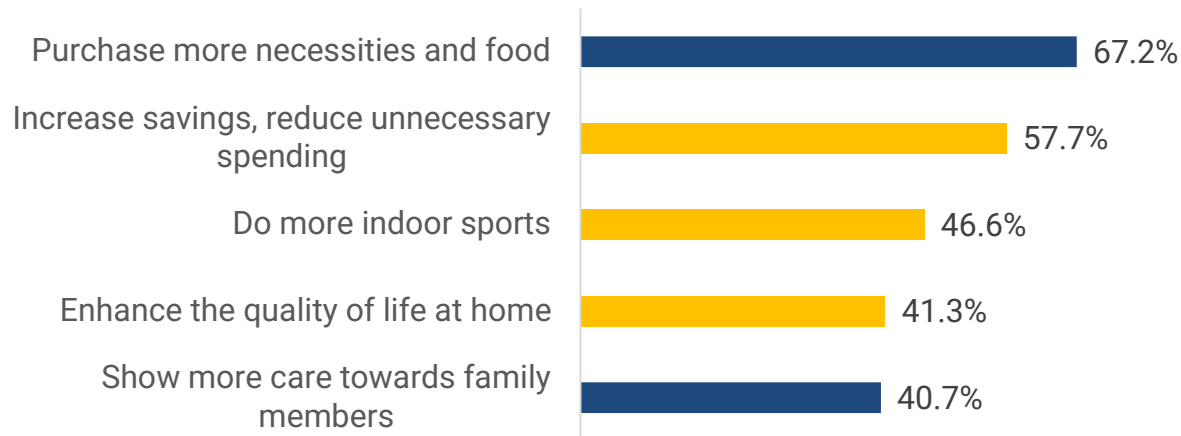

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A wake-up call for big cities – Chinese seek work-life balance

Post lockdown, Chinese people place more value work-life balance, health and freedom. Additionally, they are less interested in big cities or working in major corporations.

After COVID-19/lockdown, which of the following changes would you like to make?

Sample size N = 2,079



“After the lockdown period, I value health and freedom more than before.”

- A netizen who recovered from COVID-19



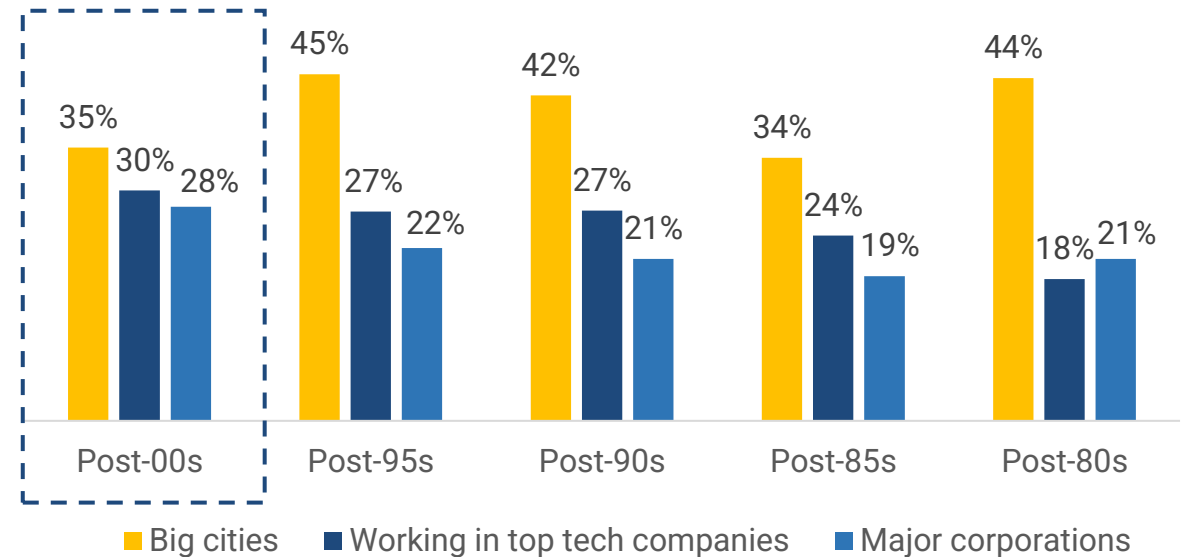
“Living in a big city or working in a major enterprise means less to me as compared to pre-COVID times.”

- A netizen from Shanghai



Which of the following things have decreased in importance in your mind compared to the pre-COVID-19 times?

Sample size N = 2,079



- Post-00s youngsters are losing interest in working for major corporations and top tech companies.
- Up to 32% of total survey participants began to contemplate whether to switch from their current cities to places with more work-life balance.

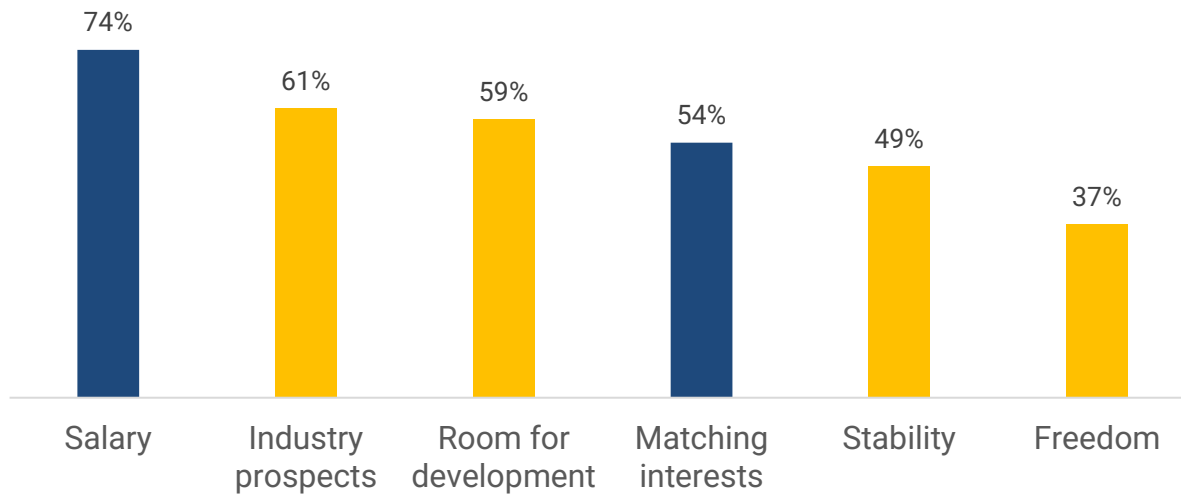
Source: DT Finance and Economics, 2022

Post-00s seek jobs that fit their career prospects and lifestyle

A survey of recent graduates showed that post-00s job seekers in China prioritize salary and industry prospects, followed by growth opportunities and personal interests.

Job considerations of the post-00s job seekers

Sample size N = 2,072



- More than 50% of the Chinese surveyed view work **as not only as a means to earn income but also a way to realize professional values, enhance capabilities, and broaden horizons.**
- Hence, they are highly concerned about personal growth and industry prospects of their chosen careers.

"I hope the career I choose is in line with my major, or fits my future career plan. I am not so eager to make a lot of money, and I hope the working atmosphere is relaxed."

- a recent graduate from Henan



"Many new careers have emerged as **people have incorporated their hobbies into their careers**, which is also in line with the characteristics of the post-00s, who have **individuality, dare to innovate and improve their level of happiness through work.**"

- a recent graduate of Hebei Normal University



"I would **prefer a less stressful job** where the pay doesn't have to be high, but there is **room for growth.**"

- a recent undergraduate, who will be attending graduate school in 2023



Source: Xinhuanet, 2022

The state of Guochao



Photo: Xiaohongshu user @臭屁香




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Guochao's scope broadened from daily essentials to high-tech products

Guochao no longer relies only on cultural resonance to attract followers, but also on technological innovation to upgrade the experience.



Source: Pechoin. Pechoin's star product - moisturizing balm, was launched in the market back in 1931.



Source: People's Daily. Baidu's self-driving Robotaxi fleet started its trial operation in Changsha.

Guochao 1.0

- Guochao brands started to flourish in 2011
- Consumers began to **show preference for long-established Chinese brands** such as Li Ning (李宁), Pechoin (百雀羚), and Warrior (回力)
- Products impacted: Clothing, shoes, food, and **daily necessities**

Source: Baidu and People's Research Institute (人民网研究院), 2022

Guochao 2.0

- **High-tech consumer goods** made in China thrived through technological innovation and emphasis on branding,
- Netizens searched and discussed **5G, locally-made semiconductor chips, AI photography, fast charging phones, and domestic smart cars** with self-driving technology on forums
- Products impacted: Mobile phones, cars, smart household appliances, and cosmetics

Guochao 3.0 and the rise of the Chinese entertainment industry

Chinese cultural IPs are popular among Chinese citizens, especially youngsters who support them through reviving traditional costumes.



Source: Weibo. "Birth of the demon child Nezha" (哪吒之魔童降世) which was adapted from a classic 16th-century novel became China's all time third-highest-grossing film (\$742.7 million).



Source: Weibo. "Big Fish & Begonia" (大鱼海棠) is a Chinese animated epic fantasy film that was released in both 2D and 3D formats.

Guochao 3.0

- **Chinese cultural intellectual properties (IPs)** started to gain popularity
- Chinese youngsters showed their support through wearing **traditional hanfu (汉服)**, watching **Guochao movies and reality shows** on Chinese traditional culture and archaeology discoveries
- Guochao 3.0 also marks the rise of **Chinese soft power**, as Chinese productions are now included on global entertainment platforms like Netflix.
- **Products impacted:** Entertainment IPs, cartoons, reality shows, and movies

Source: Baidu and People's Research Institute (人民网研究院), 2022

Consumers criticize previously well-celebrated Guochao brands

Guochao attracts the attention of young people in China. However, poor quality, plagiarism and expensive price, have become the reasons for many Guochao fans to purchase less.

Li-Ning's fashion designs sparked discussions online



Li Ning's use of **traditional design**, which resembled **Japanese military outfits**, aroused negative reactions among netizens. Its share price plummeted by over 13 percent that week.



Li Ning has been repeatedly **accused of copying the designs of Nike, Onizuka Tiger** and other brands.

Source: Weibo

Chicecream (钟薛高) sparked controversy for charging exorbitant prices on mediocre products

影茹影视
2-10 来自微博视频号
冲啊!!! 让我们把钟薛高逐渐打成平价雪糕, 咱就是说, 原来这个价格他也能卖啊, 那之前的价格得有多暴利啊 影茹影视的微博视频

"Let's turn Chincecream into an affordable ice-cream; now that they can sell at a low price, which shows that they have earned a lot with original price."



唸 dream
22-7-9 来自 iPhone 12 已编辑
#钟薛高##一样的配料钟薛高贵4倍# 没什么好高兴的, 一粒**, 坏了整个雪糕市场 唸 dream的微博视频



"The price does not match the quality."

From June 29th to July 6th 2022, among 394,000 messages related to "Chicecream" on the Internet, 46% of expressions were negative, while neutral and positive accounted for 36% and 18%, respectively.

Source: Civiw, 2022

Young Chinese people have higher expectations for Guochao

Chinese young people expect higher quality, and more cultural connotation from Guochao consumption.

The post-90s and post-00s' consumers account for 74% of Guochao brands' consumers.



Source: Xiaohongshu, Chinese netizens are eager to share their discoveries of Guochao food, apps, and fashion on social media.

- The post-90s and post-00s generations have a strong sense of national pride and cultural competence. Hence, they are more receptive to Guochao brands and willing to share their purchasing experience with peers online.
- Consumers recognize the design and cultural connotation of Guochao products and are willing to pay a 10%-30% premium.

Source: 36Kr, 2023 and iResearch, 2022



When the development of the “Guochao” connects with mediocre quality, high prices, plagiarism and other issues, “Guochao” is **turning from our national “pride” into the “concept” that rips us off** (割韭菜).

- Xiao Chen, a Guochao enthusiast born in 1995

Guochao is not just product printed with Chinese characters or patterns, but also needs to **have depth and cultural connotation**.

I hope that the brand can really understand Chinese culture, make high-quality and cost-effective products.

- Mingyang Li, a Guochao brand shop owner



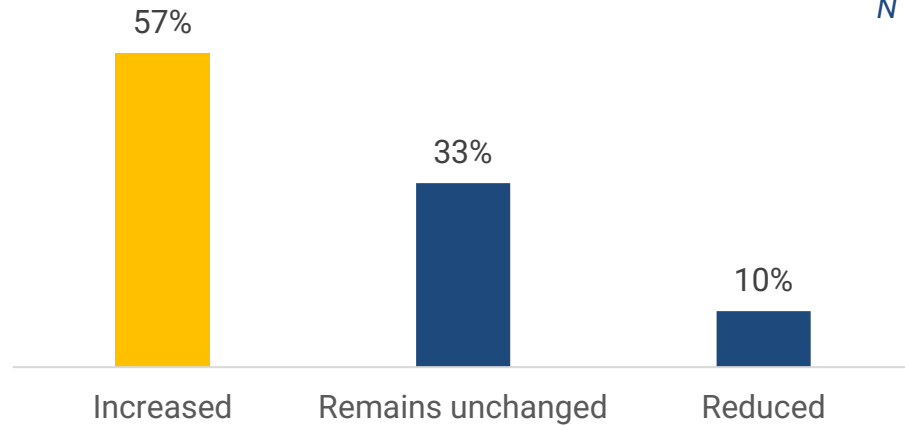
Source: 36Kr, 2023, Xinhuanet, 2023

Guochao brands are here to stay, but with more emphasis on Chinese culture

The "national trend" has become the key for Chinese brands to compete for traffic and sales. Guochao brands are forming a unique artistic trend through the excavation and redesign of traditional Chinese cultural elements.

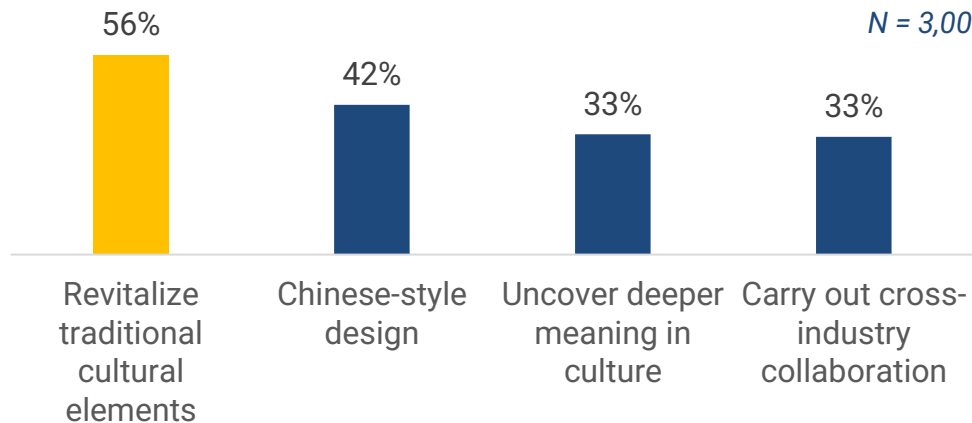
How has your spending on national products changed over the year? (2022)

N = 3,000



Consumers' preference in Guochao elements (2022)

N = 3,000



Source: Tread Research Institute 智萌研究机构 (2022)

Timage (彩棠): Chinese makeup brand that redesigned Chinese tradition and aesthetics



Source: Huodongju (活动聚), the "liubai" makeup style in Timage's video for the "Great Beauty" event



Source: Zhihu. Chinese paintings with liubai (留白) technique

- Timage promotes **simple makeup styles that enhance people's natural beauty and boost their confidence**. The founder Tang Yi developed a unique makeup technique called *liubai* (留白). This results in a **balanced makeup look that is full and vibrant but not overwhelmed by excessive products**.
- The *liubai* technique is inspired by Chinese traditional arts, like poetry, painting, architecture, which made use of blank spaces to **emphasise important features of the composition**.

等了2小时的队伍,吃了个不怎样的餐厅

Shift in focus from mass consumption to rational consumption



Photo: Xiaohongshu user @乱画的小陈

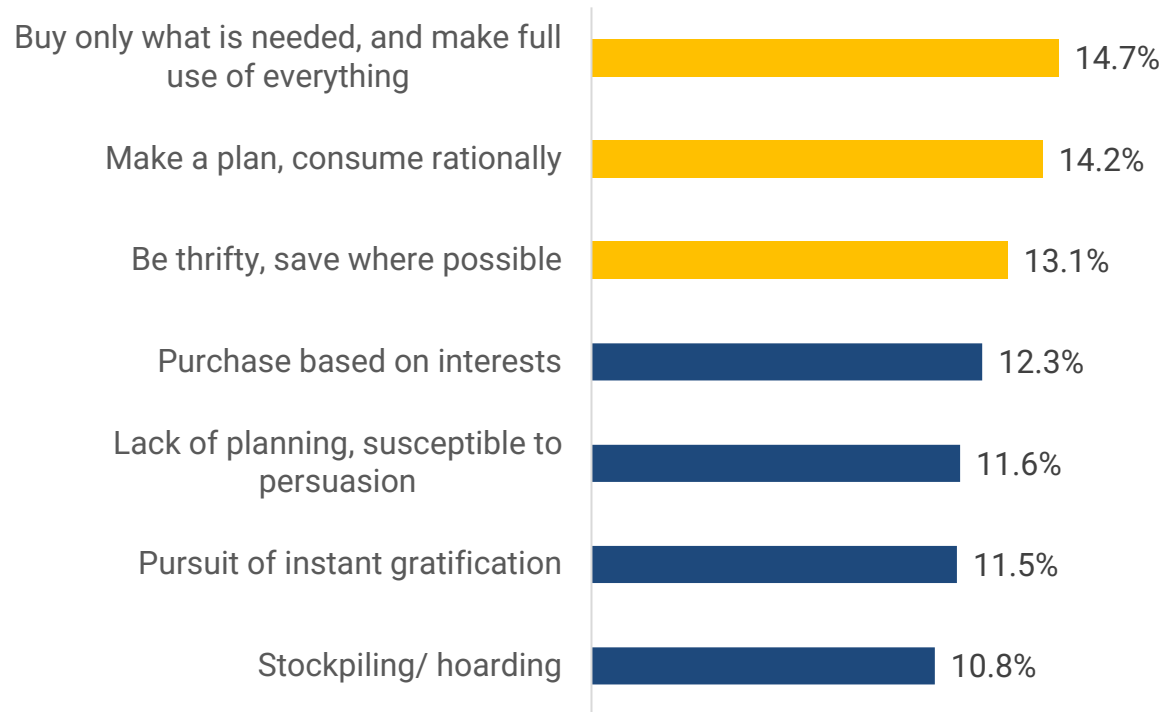
"Only buy what is absolutely necessary" is the new consumption philosophy

"Consumption downgrade" is a trending phrase on social media. On Little Red Book, a post titled "2022 Consumption Downgrade, Rational Consumption" has received over 100,000 likes and comments.

The consumption pattern of the Chinese in 2023

Sample size N = 3,000

Source: Zhimeng, 2023



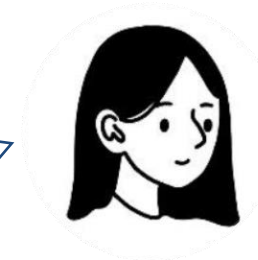
Li Rui (26 years old)
Who implemented the "only buy what is absolutely necessary" plan for 100 days

"My go-to restaurant changed from Hai Di Lao to a street-side skewer restaurant."

"I take public transportation, buy groceries to cook at home, reduce takeout orders, and replace milk tea with bottled yogurt to lower my living expenses."

"If income can't be increased, we have to cut back on expenses."

"After meeting one's basic needs, saving money to do something that truly matters to oneself is the real high-quality consumption."



Liu Qianli (Gen Z)
Another adherent of the principle of "only buying what is absolutely necessary."

Source: hxnews.com, 2022

2

Adventure tourism



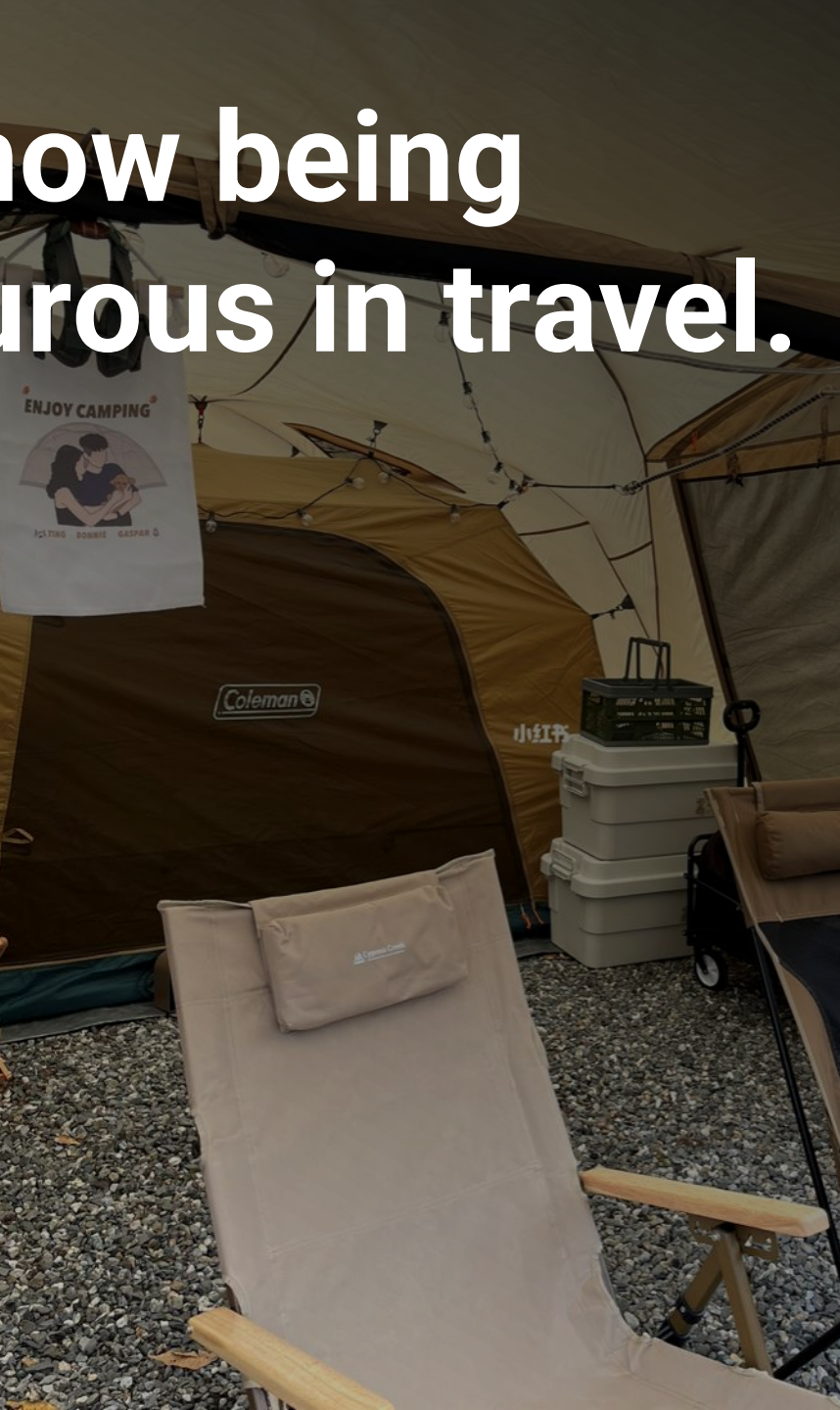
Photo: Xiahongshu user 野生摄影师 – 单车仔Kyle
📍 Yading nature reserve


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Chinese are now being more adventurous in travel.



Photo: Xiaohongshu user @ Bonnie



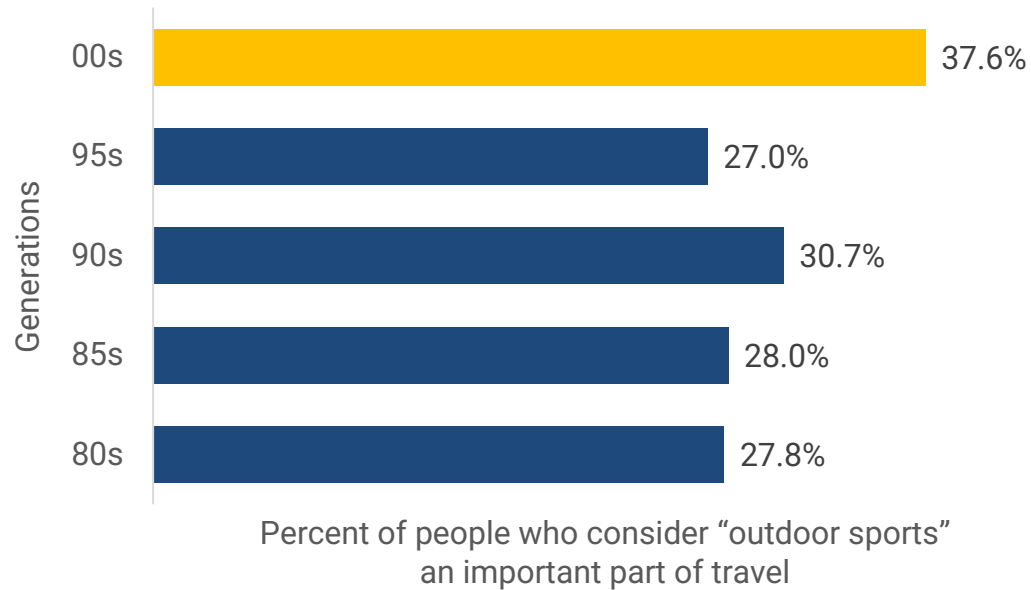
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Gen Z are becoming more adventurous travelers

Gen Z shows the greatest interest in outdoor sports during travel, and are more interested in broadening their horizons, enriching their life experiences than relaxing.

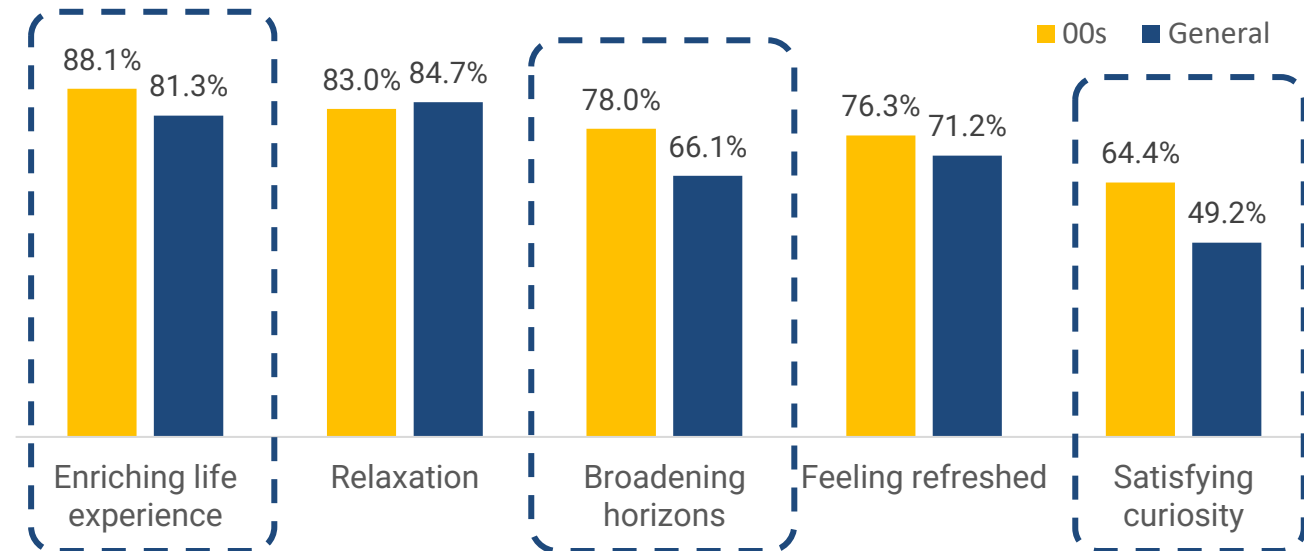
Are outdoor sports considered a part of an “ideal” trip?

Sample size N = 1,783



What does “travelling” mean to Chinese Gen-Z?

Sample size N = 1,783

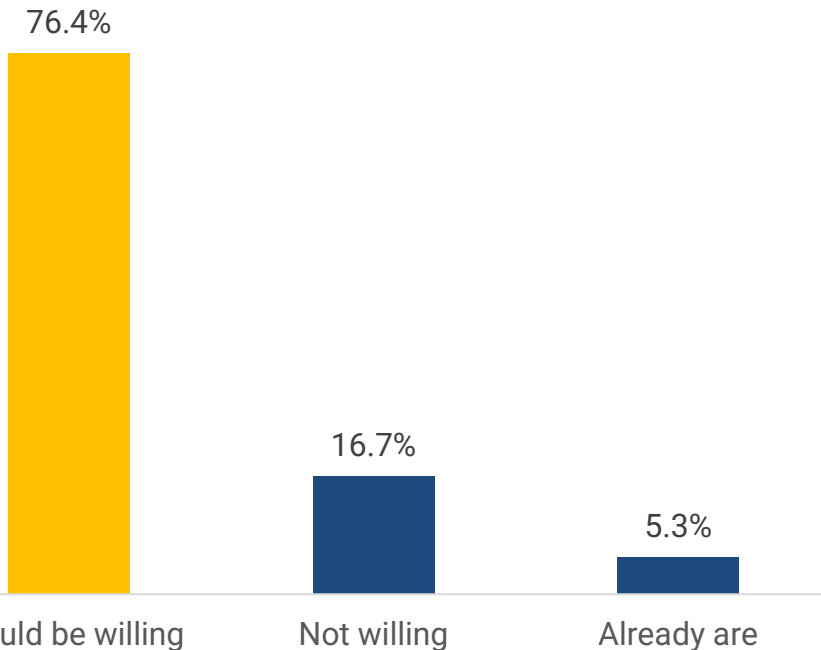


Source: dtcj.com & KuRunData, 2022

76% of Gen-Z are open to becoming a “digital nomad”

The community between digital nomads is growing as many youngsters are joining for a better work-life balance.

Attitude of the Chinese Gen-Z towards being digital nomads



Source: zhaopin.com & National School of Development, 2022
* Zhaopin.com is a major Chinese job seeking platform

Why Chinese become digital nomads

“People are really sick of the company culture in China like **996**”

“If you work in cubical, you don’t really have that kind of **creativity**.”



Daniel Ng
Co-founder of the Dali Hub
(a co-working space in Dali)

The sense of community between nomads



Source:
Bloomberg News, 2022

DAO space

A co-working venture in an old bedsheet factory in Dali, Which charges customers only 480 yuan a month.

“The space provides an area for people to **exchange their resources and skills** so that we can **grow our little community**.”



Glitch Boy
A former English teacher
Well-known in the local group of digital nomads

Nearly one in every three young Chinese is highly interested in camping

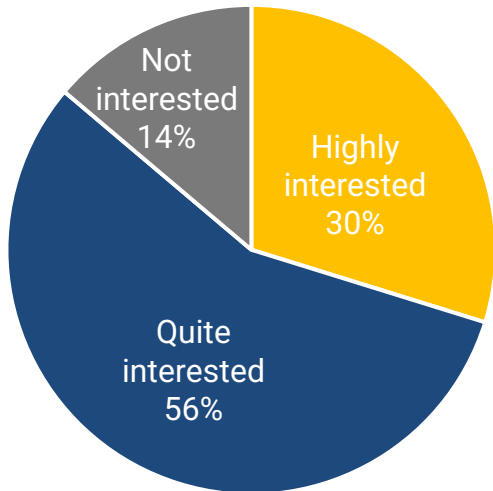
As youngsters are increasingly captivated with the outdoors, camping has become a raising star.

Chinese youngsters show enthusiasm for camping

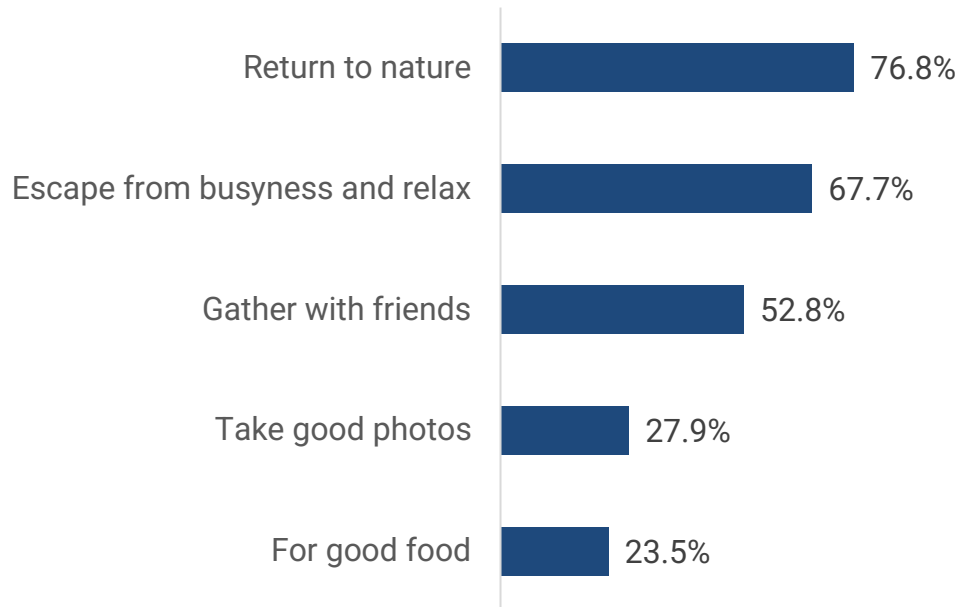
Sample size N = 1,296

Source: Oh! Youth, 2022

Level of interest



Reasons millennials and gen Z like camping

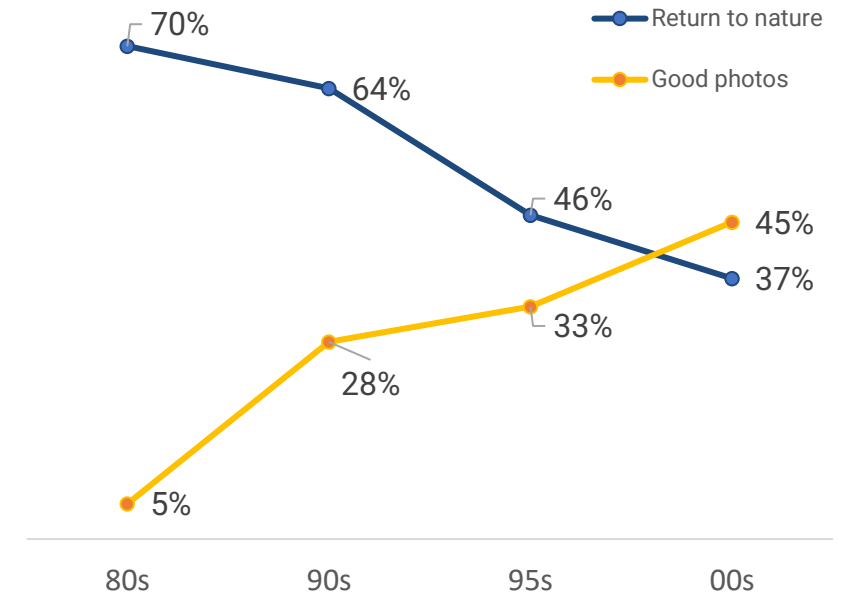


Good photos > enjoying nature?

Sample size N = 1,296

Source: Oh! Youth, 2022

Purpose of camping of different generations



The **younger** the generation is, the **more** they prioritize "taking good photos". This has fueled the rise of "Glamping".

Hainan is more than just a shopping destination

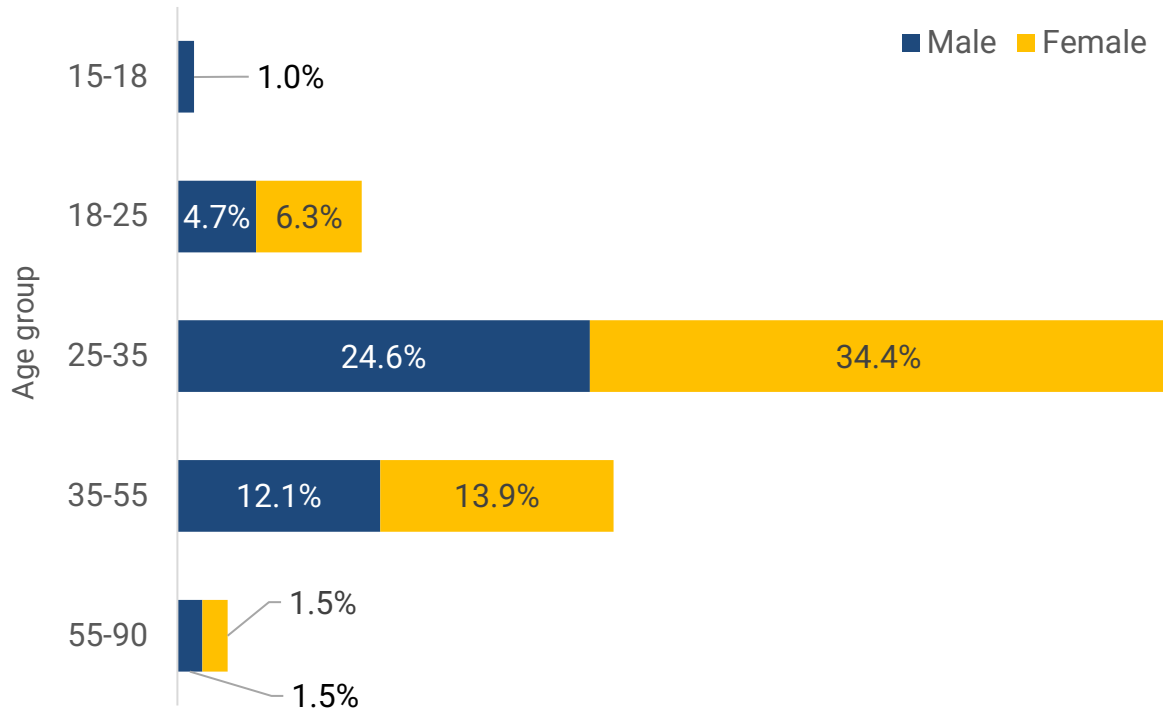
Photo: Xiaohongshu user @ Zui_photograph


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Chinese youngsters are visiting Hainan for outdoor sports

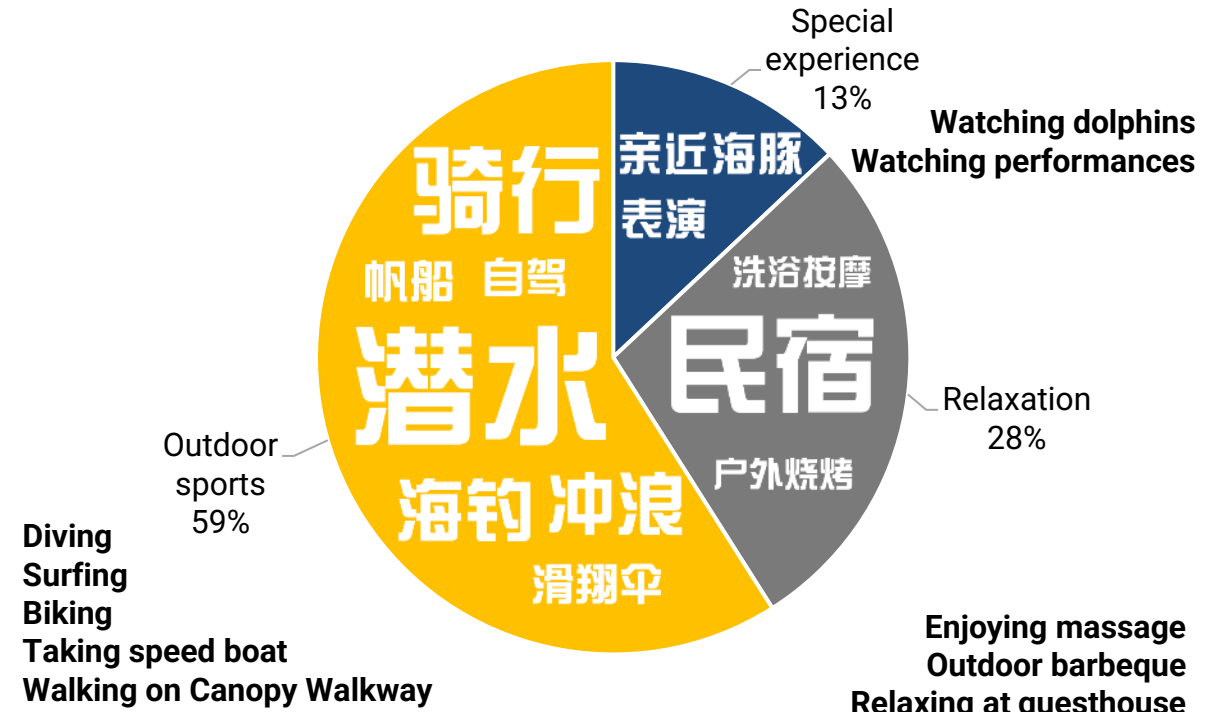
Gen-Z and Millennials are the significant sources of Hainan's tourists. Outside of shopping, they visit Hainan for outdoor sports.

Gender and age of tourists visiting Hainan



Source: Mafengwo, 2021

Tourists' preference for recreational activities

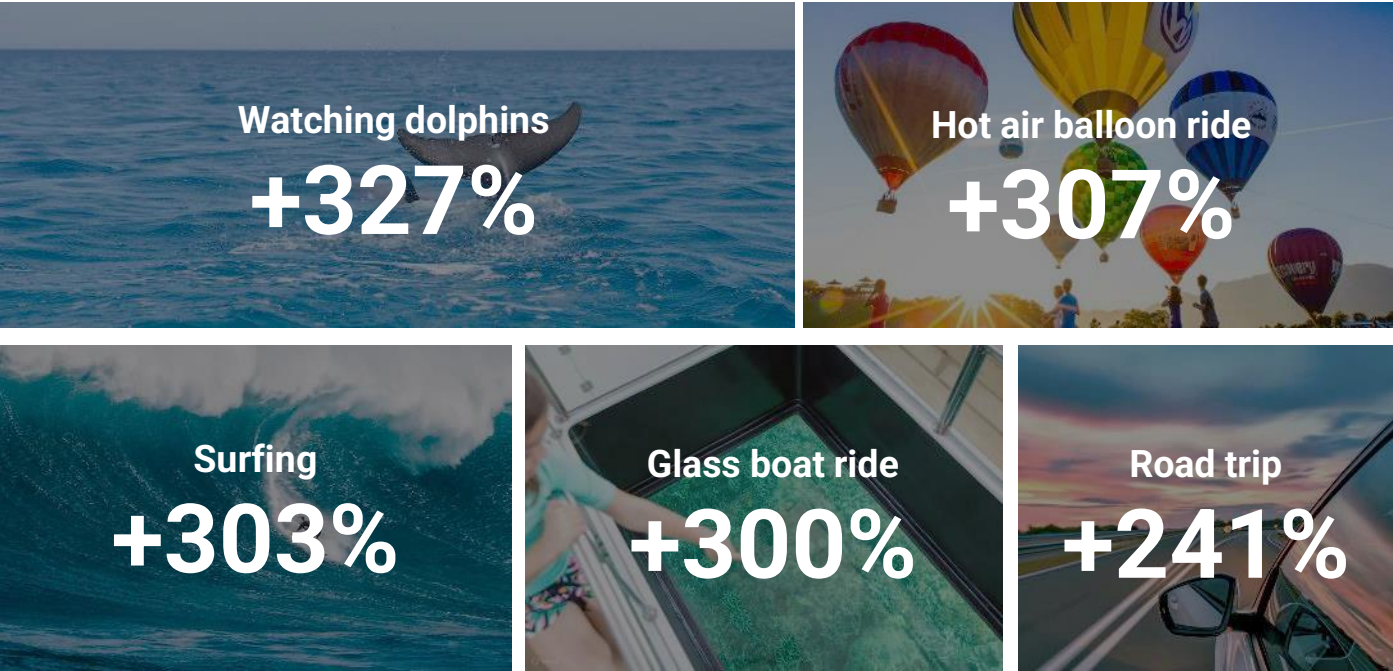


Source: Mafengwo, 2021
*Data derived from big data collected by Ma Feng Mo, a leading travel website in China.

Watersports and eco-tours are rising in Hainan

While diving remains the most popular watersport in Hainan, other watersports are seeing significant growth in popularity. With the support of the local government, ecotourism is expected to be the next prevalent touristic activity in Hainan.

Top 5 touristic activities in Hainan with high growth rate in popularity



Source: Mafengwo, 2021

*Data derived from big data collected by Ma Feng Mo, a leading travel website in China.

*Growth rates were calculated by comparing to data from last year.

The next hit: Eco-tourism



“Hainan's forest coverage rate is over 62%, we must make good use of it to promote **ecotourism**”

Gao Shuchao
Deputy director of Hainan Provincial Forestry Bureau



“By building **highways** circling around the tropical rainforest national park, we would like to promote eco-tourism activities such as **rainforest exploration, rock climbing, orienteering, wilderness survival and fitness trails.**”

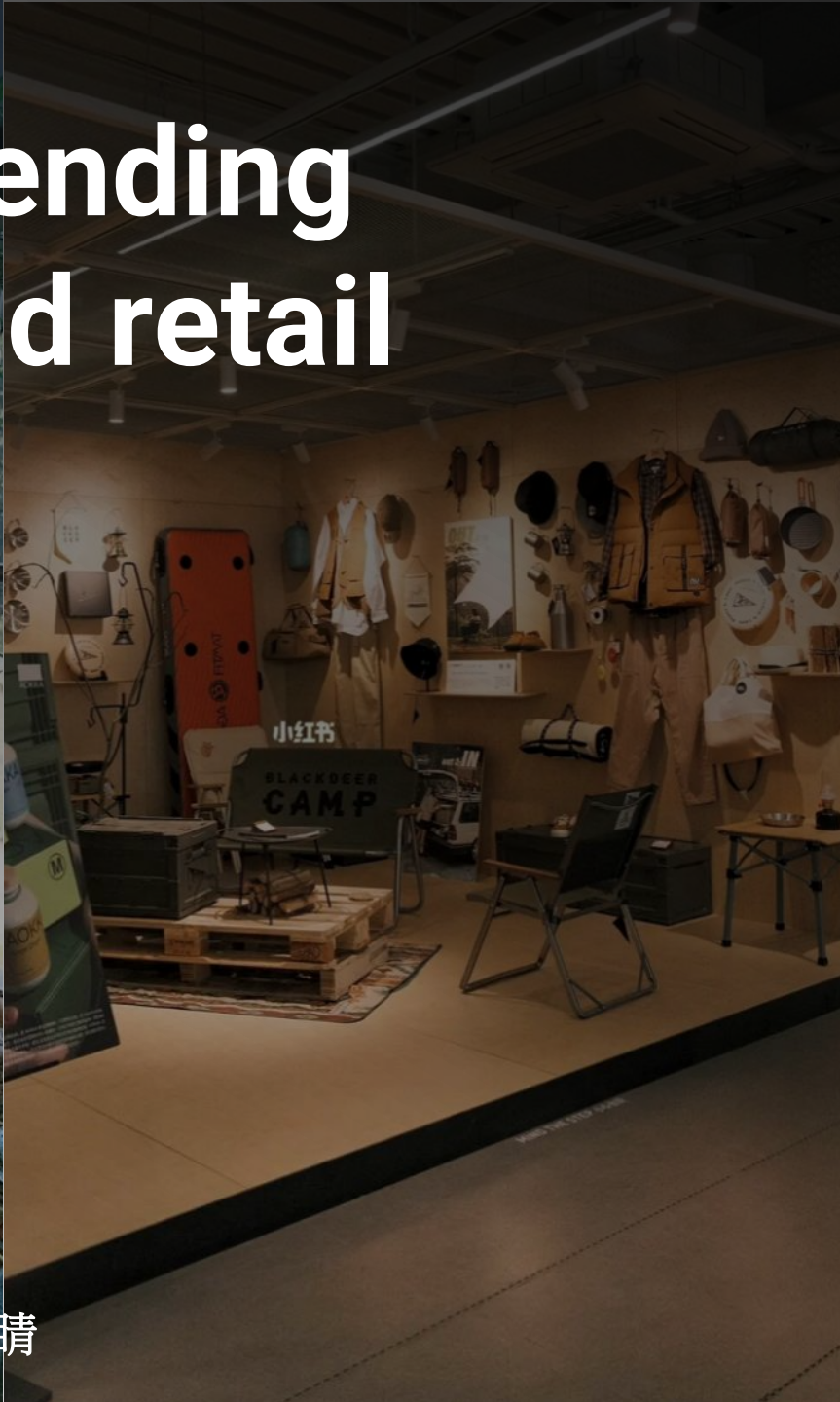
Li Huiwei
Director of Hainan Provincial Department of Tourism, Culture, Radio, Television and Sports

Source: China News Service, 2023

Brands are blending wilderness and retail



Photo: Xiaohongshu user @ holiday小眼睛



How brands bring stores to nature

Patagonia has made an unusual move – shifting from indoor shopping malls to outdoors to attract Chinese customers. Chinese youngsters enjoyed the brand new integrated outdoor shopping experience.

Patagonia's first store outside malls in China: Jinling style



Source: Sohu, 2023; Brandstar, 2023

📍 Jinling STYLE (Nanjing)

“Patagonia plans to **close** its two stores in Shanghai, located in **commercial districts**, to open **more outdoor stores** like this.” said the brand ambassador

“Jinling style was located right next to Xuanwu Lake, the scenery really was beautiful!” “There was also a lawn of 3,000 square meters, which was perfect for pictures!”



小土豆今天吃饭了吗！

关注

南京新晋打卡圣地 📍 | 金陵style !!

南京又有网红打卡新坐标啦 📍

金陵STYLE的定位是“都市美学融合体，集休闲，露营，咖啡，阅读，艺术于一体”👍



Outdoor shopping district in Beijing winning Timeout Love Awards

Source: Timeout Beijing, 2023



📍 Langyuan Station (郎园Station)

An open space that integrates with its **natural surroundings**, consisting of creative pedestrian streets, leisure and entertainment area, and designer clothing stores, adhering to its concept of "Boundless".

“Langyuan Station is a **young** and **exciting** new destination in Beijing where cultural activities are being held and high-quality consumer brand stores are located at.”

-- Timeout Beijing

📍 Yep! Outdoor Collection Store (in Langyuan Station)



Pop-up stores in nature are not limited to Sportswear Brands

The international luxury brand – Prada, also rode on China’s trend in outdoor sports and adventurism by placing its pop-up store in nature. On top of shopping, Prada also added extra value to its pop-up store, with lessons and cultural activities.

Prada incorporated their pop-up store in nature

Source: Mo Dou Shanghai, 2021



📍 Prada Rong Zhai

Divided into two areas, the indoor area displayed exclusive collections, while the outdoor area was decorated into a luxurious garden.

Relaxing tents, deck chairs, clothing and accessories were placed in the sunny garden.



More than shopping: activities in Rong Zhai

Source: Luxe.co, 2021



- Professional camper Gu Yue offered **courses for campers** with different experience levels, sharing his experiences, and skills in using camping equipment.
- Baristas and bartenders taught everyone the secrets of how to **prepare delicious coffee and cocktails in the outdoors**.

Gardening class



Folk music concert



Movie viewing



How brands bring nature into stores

Many Chinese restaurants are incorporating nature into their stores. Customers are pleased with the change, as it enhances the visual appeal of the restaurant.

Original Chicken: the pioneer in redefining fast-food dining experience



Home Original Chicken is currently the most popular Chinese-style fast-food chain in China, with 1000+ locations across the country.

A **farm-themed** branch in Shanghai featuring "**slow - fast food**" was opened in Shanghai, which topped Dianping's "Jinyang District Fast Food and Simple Meal Chart" with its popularity.



The store uses white and earth-tone colors for its design. **Green plants** are used for decoration at the store facade, entrance area and the inner walls, delivering a **sense of relaxation**.

Source: weibo@商业地产志, 2022



Feedback from customer

"This is the most beautiful branch of Home Original Chicken that I have ever been to."

"The environment is natural and fresh, like a dreamy forest."

"I enjoyed taking pictures with the green plants in the store."



关注

最亲近大自然的森系餐厅-老乡鸡农场店开业

相信大家，一看到老乡鸡这三个字，就会想起那香喷喷的鸡肉！不过除了香喷喷的鸡肉令人向往，你们一定不会想到，老乡鸡也那么“卷”了！！竟然把“农场”搬进了商场里~成为了拍照打卡超好看的餐厅！
这是我见过最漂亮的一家老乡鸡了，环境自然清新，宛若进入了森林般梦幻，绿植萦绕氛围感十足，拍照美美哒！在这里用餐，心情也会变得快乐又舒畅！而且把开放式的取餐区也是设计成了老乡鸡的农场庄园，处处都充满

100+ 10+ 10+



小红书

Hypotheses on the rising adventurous spirit in young Chinese

The rise of disposable income and social media usage inspires young Chinese to become more open to taking risks. This leads to more demand in outdoor activities and sports, and more niche travel locations, marking a major shift in Chinese tourism.

The increased urbanization leading to a disconnection with nature, combined with the increased awareness for sustainability, young Chinese consumers are more drawn to natural scenery and are attracted to retailers that incorporate it.

The growing emphasis on environmentalism combined with a more adventurous spirit could lead young Chinese to spend more on experiences over products. This extends to unique gaming experiences, escape rooms, and individual sports.

Not only is the outer world of young Chinese becoming more adventurous, but the inner world as well. More young Chinese are exploring meditation, mindfulness and yoga.

Young Chinese are less interested in traditional office 996 office jobs at big companies in big cities, and are going to become more entrepreneurial, taking on jobs that allow more freedom, like influencers, travel guides, and other initiatives.



Parenting

Gen Alpha



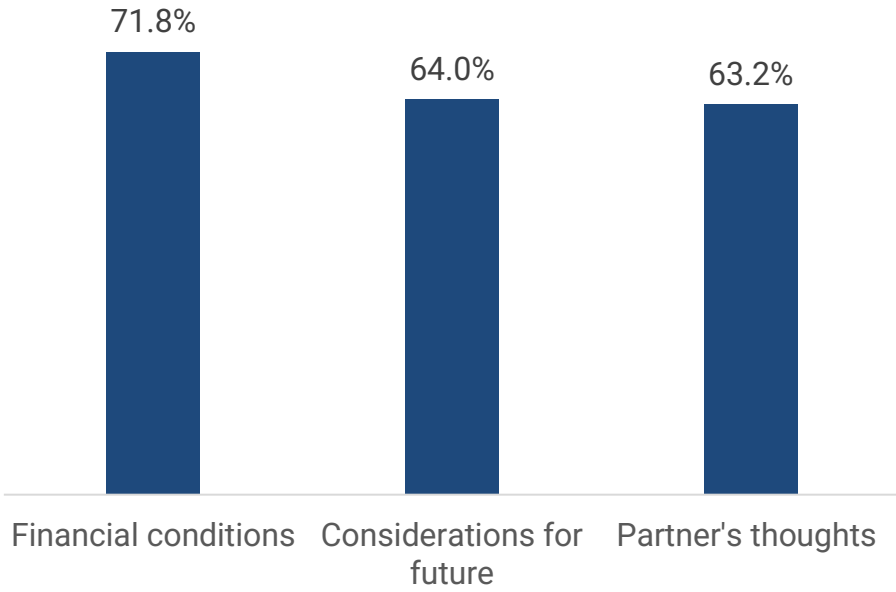
Photo: Xiaohongshu user @两只小昭


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Young Chinese adults are hesitant to have children

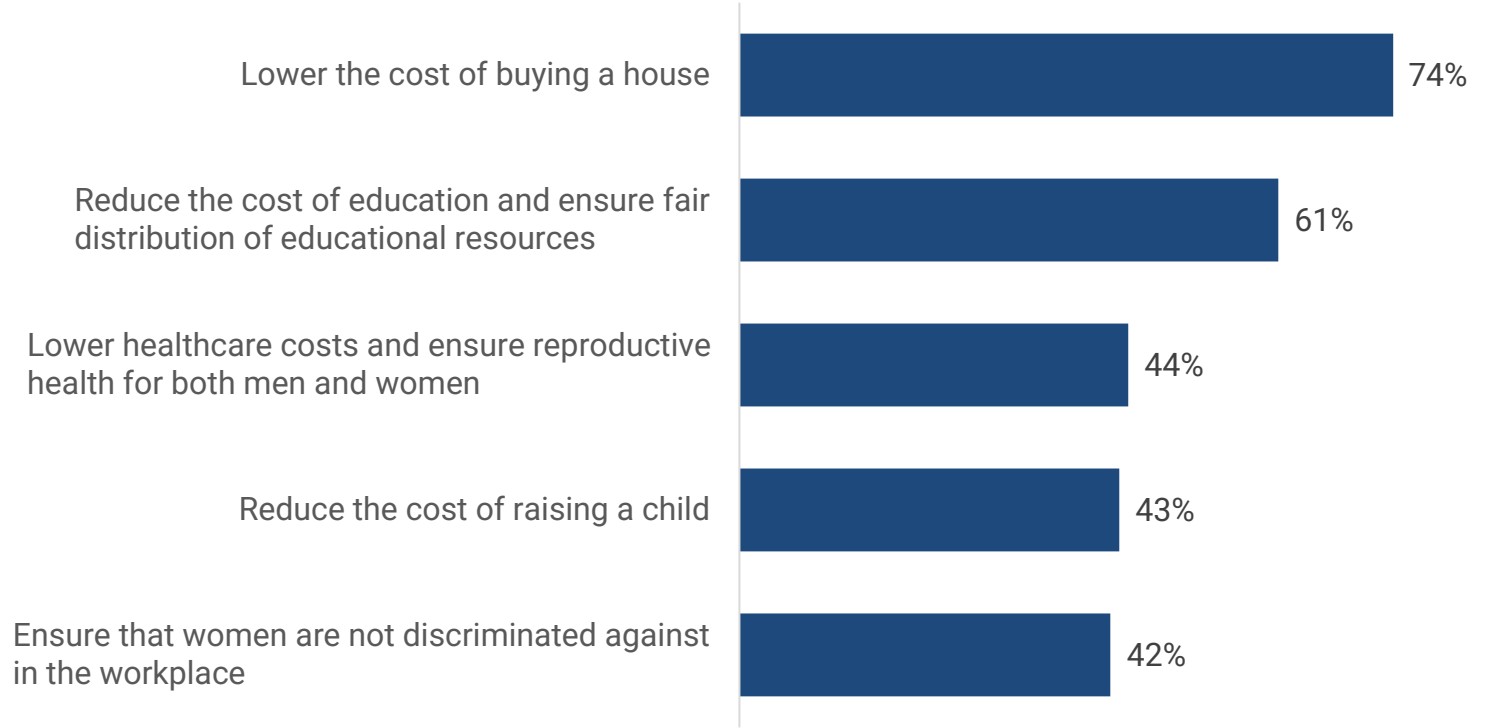
The birth rate in China is continuously declining. The finance and pressures of housing, education, and job prospects create a bottleneck of parents wanting to have children.

Top 3 factors that influence young Chinese adults decision to have children



Source: China Youth Daily, 2022
*The China Youth Daily is the newspaper of the Communist Youth League of China.

Top 5 policies that Chinese young adults believe would increase their willingness to have children



Sample size N = 9,775
Source: Renmin University of China (Population development studies center), 2022

Today's parents are more concerned with their kid's holistic wellbeing

Due to their higher levels of education, younger parents tend to have a more holistic approach to parenting. While some parents continue to be extremely strict, others are granting their children more freedom, indicating a potential shift away from the stereotype of strict Chinese parenting.

According to teachers, today's parents...

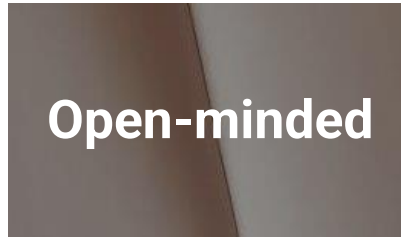
36% Exhibit an enlightened parenting style

Actively listen to their child **36%**

27% Showcase strong communication skills

Emphasize holistic development **27%**

9% Provide more resources for their child



"Parents nowadays are more willing to think **from the perspective of children** and will be more willing to communicate with children **calmly** about some problems."



Miss Pan
4th grade Chinese teacher at primary school

Younger parents are more open-minded, and they encourage their children to be **exposed to new things**.



Miss Chen
Biology teacher at a private high school

They do not consider grades as the **only criterion** to measure the excellence of their children.



Miss Wang
English teacher at private junior high school

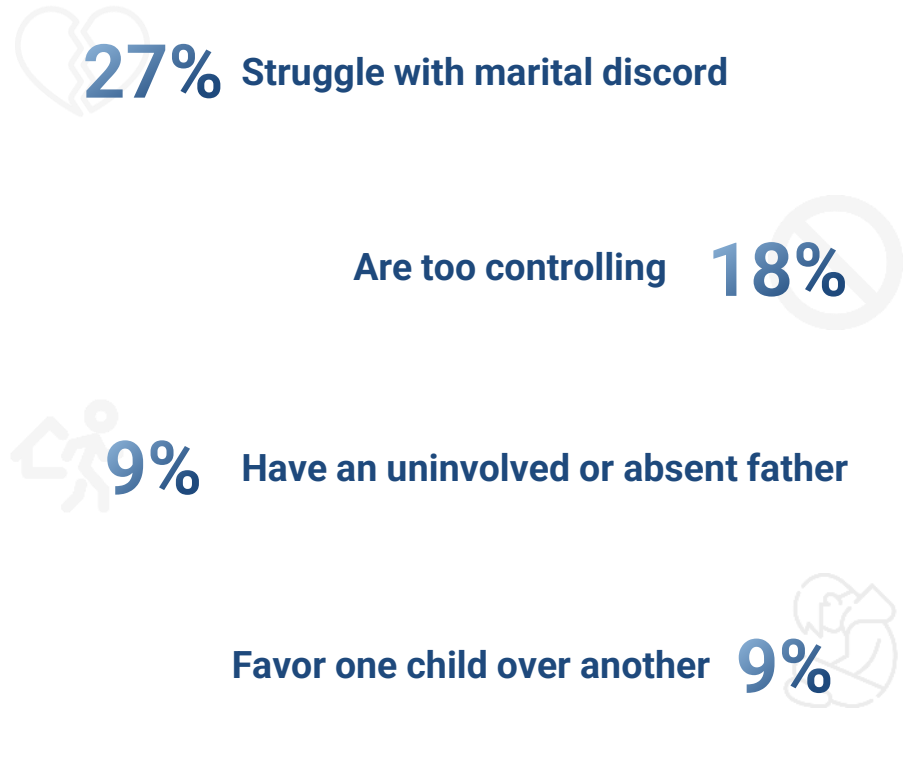
Younger parents are starting to focus on their children's **mental health growth**, as well as their **interest development**.

Source: In-depth interviews with teachers in China by daxue consulting

However, Gen A's parents' strong personalities can cause tensions

As Gen A's parents are the most educated yet, they also have strong opinions and ideologies which can cause tension with teachers, and in some cases, highly educated parents place even more pressure and control on their children. Also, divorce rates are increasing and impacting parenting styles.

According to teachers, today's parents...



High divorce rate

In this generation, parents are more likely to get **divorced**, which can result in children feeling **unloved**.



Miss Yang
4th grade Chinese teacher at primary school

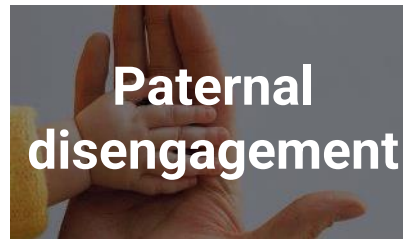


Over-control

As parents' overall level of education improves, they may tend to **impose their own learning methods** on their children.



Mr. Gu
English teacher at a private educational institution



Paternal disengagement

Some students have **fathers** who are completely **uninvolved** in their children's lives, and in these families, **mothers** are typically responsible for their children's education.



Miss Wang
English teacher at private junior high school

Gen A struggles with new psychological issues

In our in-depth interviews with Chinese teachers, they report their students struggling with goal-setting and social skills.

Social issues

Motivation issues



Miss Wang

English teacher at private junior high school

Psychological issues seem to be a unique difficulty that this generation is facing. This generation has an elevated rate of psychological problems based on the schools psychological surveys.



Miss Chen

Biology teacher at a private high school

The problem my students have is dealing with the **daily social relations** with their classmates, and in general, they are very anxious.



Miss Qiu

Chinese teacher at a primary school

My students struggle with making friends, I think it is very strange, when we were young, making friends is actually quite easy, but I find that **today's children need to be taught how to get along** with the friends next to them

They're lonely. The generation of children in previous years was more lonely, because most of them were indeed only children at that time, and then all the attention of adults was focused on him.

Domestic policies that require schools not to provide whole-class results have left some students **unable to set goals** well. Such a policy is also not in line with the country's current requirements for academic performance.

Students nowadays are **less able to think on their own** than before. They have a lot of access to information and rely more on teachers and parents. You will find that very few students have the idea that "I must finish it by myself today".

They are very vague in their goals, few of them can speak to what they expect or want to be, and they do not have a very clear idea of the future.



Mr. Gu

English teacher at a private high school



Miss Cai

Math teacher at a primary school



Miss Wang

English teacher at private junior high school

Teachers are relatively accepting of tech, but parents are wary

88% of teachers from our in-depth interviews feel tech has a net-positive impact on Gen A, but they also say there should be limitations at home to prevent myopia.

Excessive tech use impact on brain

Decrease in verbal intelligence and over a few years, impacts brain development in the areas associated with **language processing, attention and executive functions, emotion and reward**

Problematic internet use is associated with less openness and agreeableness, as children with higher levels of problematic internet use end up with a **deficit in social skills and difficulties in establishing interpersonal relationships**, which can lead to being less open and visible, or less friendly externally.

Source: National Library of Medicine, Impacts of technology on children's health: a systematic review, [Pediatri](#), 2023

Cell phones, computers and other **electronic devices bring more negative effects**, they distract students' attention.

They have more ideas, or are exposed to more things, and they think a lot about themselves. Their ability to learn, and their ability to think has improved. Thanks to technology, **they have wider access to information**

I think technology has had more of a **positive impact on today's students**. While previous generations used more paper books, tutorials, etc. for learning materials, today's students prefer to search the Internet for relevant materials, resources, or subject-related information. Our English classes do not have paper assignments, they are oral readings or interactive performances, and students are more interested in this form of teaching.



Miss Chen
Biology teacher at a private high school



Miss Chen
Math teacher at a junior high school



Miss Cai
Math teacher at a primary school

Source: In-depth interviews with teachers in China by daxue consulting

Messy play is becoming a popular early childhood education activity

Millennials and Gen Z start to seek parenting advice on the internet as they enter new phases of life. In contrast to their parents, they are generally more open to taking risks.

Messy play classes



小红书

Babies first explore the ball pit, then play with cornstarch and coconut oil flour.

Outdoor messy play



Alice
(Guangzhou, with a four-year-old son and expecting her second child)

Before 2020, I would want him to spend more time with other kids and have fun. But now, our family will explore different parks and beaches to be closer to nature.

Many parents like Alice want to take their children into nature as often as possible to make up for the months of highly structured, indoor-time during the pandemic.

Source: tong.global, 2023



I enjoy taking my child to explore new places.

We had great fun. But my father said his blood pressure rose when he saw the children playing with mud!

Source: tong.global, 2023



Ling
A mom who took her kids to messy play classes



I think every kid enjoys jumping in muddy puddles.

The feeling of mud on your feet is quite enjoyable.

Hypotheses on the next generation of parents

Resource-rich parents will be heavily invested in creating their perfect, well-rounded children

More educated parents

More focus on child's holistic-growth leading to more demand for non-academic experiences. However with more parents working long hours, grandparents are playing a larger role in early-childhood.

Next generation of education

After the government crackdown on after-school tutoring, parents will fill the new-found time with scenario-based education and sports, and the arts, fostering holistic development. Niche groups of parents will experiment with unstructured play.

The impact of AI

Parents will start leveraging AI solutions in parenting, for example an AI language teacher, math tutor or even therapist.

A possible bottleneck of parents

The next generation of parents will be a mixed bag of those with resources to make an active decision to have children, and those on the traditional path where they have children out of filial duty no matter what resources they can provide.

Gen A's upbringing marks the flip in education from knowledge acquisition to interpersonal development

As parents will play a very proactive role on guiding their children there's more of a market for holistic development, including mental, emotional and physical wellbeing.

Schooling and education apps will focus less on information acquisition and memorization and focus more on developing critical thinking, communication, and creativity.

AI allows for more personalization, catering to each child's needs. As roles replaced by AI starts to trickle into education, it could leave a lot of room to grow soft, interpersonal skills.

There will be gaps in privilege among children created by a bottleneck of only resource-rich parents having kids.

4

New definition of
Romance

Photo: Xiahongshu user @南风和焰火|北京


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Being more rational in romantic relationships

小红书

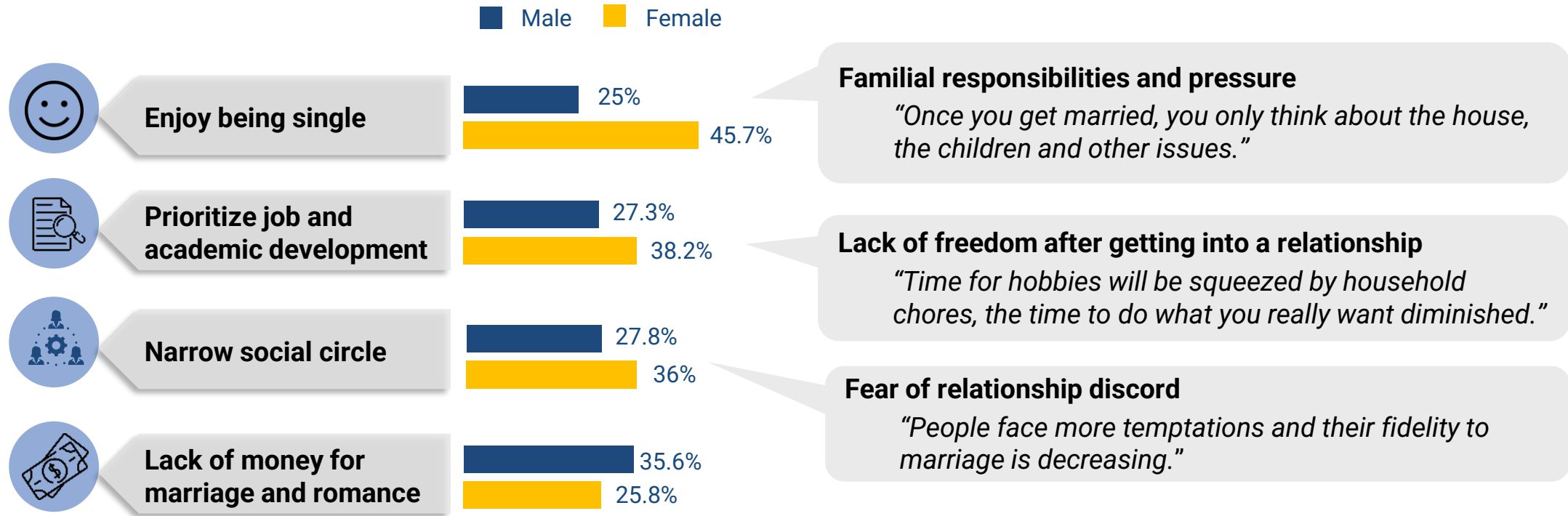
Photo: Xiahongshu user @快乐星球


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More women choose to be single while some men have no choice

Close to 46% of single Chinese women chose to be single to enjoy life whilst most males stay single due to the lack of funding for marriage and romance

Reasons for staying single



Sample size N = 631

Source: Aurora Mobile, 2021

Gen-Z brings “involution” into relationships

Involution “内卷化” in love relationships refers to the couples’ expectation of progressing together with their partner and maintaining a similar pace in improving their social status. This was reflected in both their perception of romance and preferred TV show plots as shown by a survey among 2,771 Chinese youngsters.

Young Chinese couple seek improvement in relationships

Sample size N = 2,771

What do you value in a relationship?

Rank	Post-85s	Post-90s	Post-95s	Post-00s
1	Common ground	Common ground	Progress together	Understanding
2	Understanding	Trust	Common ground	Progress together
3	Trust	Understanding	Understanding	Common ground
4	Companionship	Progress together	Companionship	Companionship
5	Progress together	Companionship	Trust	Trust

Source: DT Finance and Economics & Youku, 2022

Preferred couple plots in romantic TV shows are...

Sample size N = 2,771

TOP 1

Strong and equally matched

They are strong and treated as equals. They may have similar family backgrounds, social statuses, and personal capabilities.

TOP 2

Mutual redemption

They often have tragic experiences. When they meet they heal and accompany each other, facing the challengers together.

TOP 3

Pretty looks

Couples who have good looks.

The involution trend causes the younger generation to feel ousted if they do not work hard. Thus, the top 2 attributes show that young Chinese emphasize the ideal of striving in both relationship and professional achievements.

Source: BBC, 2021

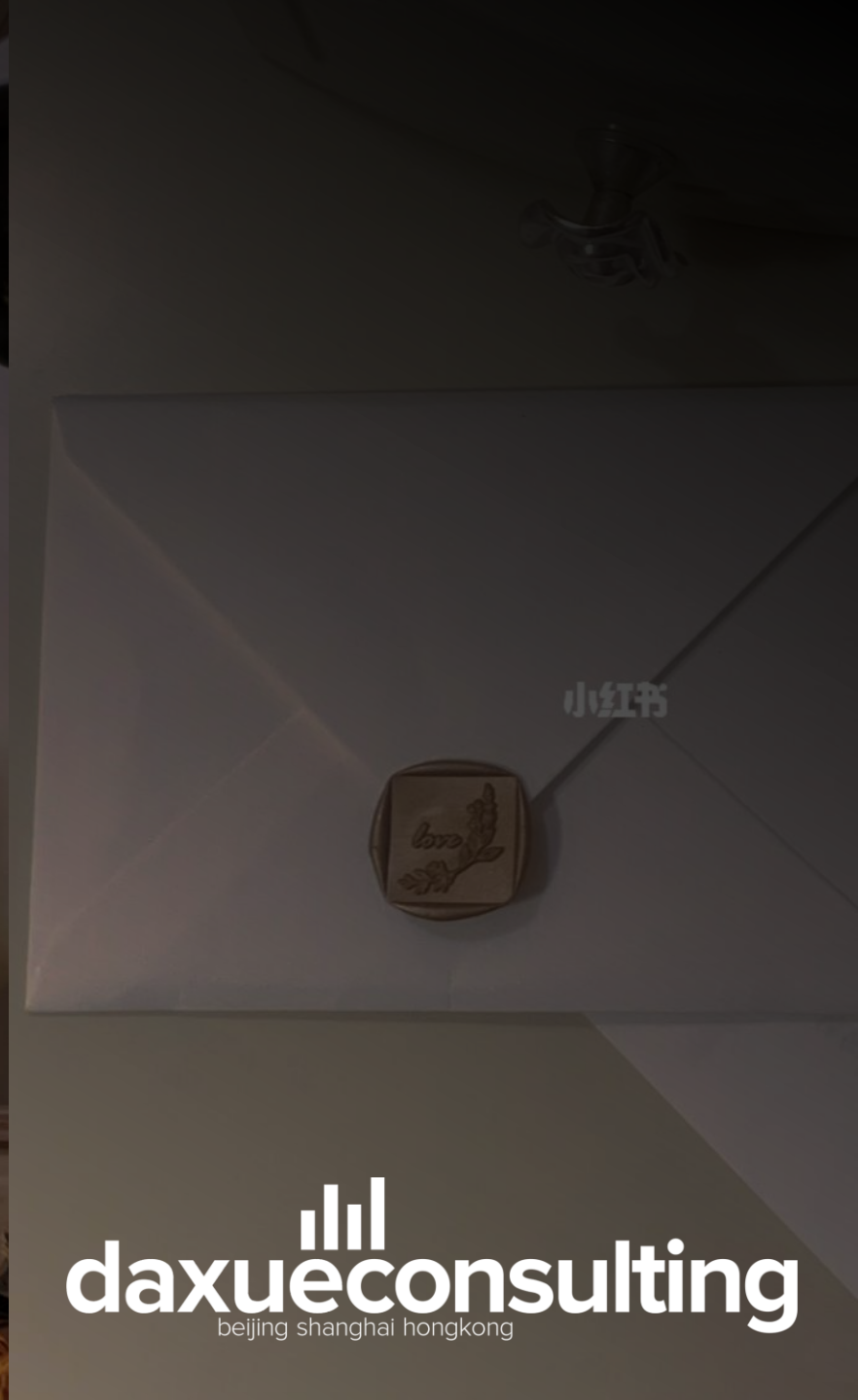
New ways of courtship



Photo: Xiahongshu user @荔月念捌



小红书



小红书


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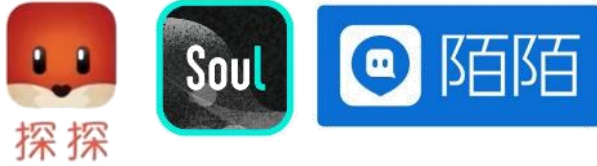
Matchmaking in the modern era through big data

Gen Z and post-90s in China proposed ambivalent views on meeting the “right one” online; they like the idea for a “quick match” and dislike it for the misinformation.



Why some young adults prefer using apps

Apps



Popular dating apps from both China and international markets

- **More comfortable and relaxed** as compared to meeting strangers offline.
- **A low-cost and high efficiency** way to approach potential boyfriend/girlfriend and sex partner.
- **Utilize the fragmented time** to meet potential partners for a relationship

Astrology and MBTI

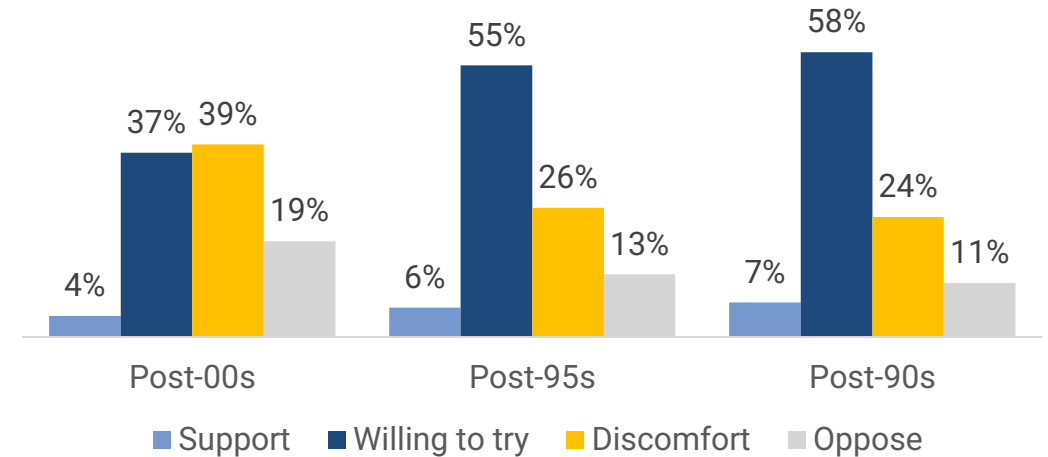


- Achieve fun and **quick screening**
- The test results can be **shared easily on social media platforms** such as WeChat moments



Why some young adults do not prefer using apps

Attitude towards love matching through dating app



Among 806 post-00s respondents, close to **40% of them are uncomfortable finding love online**, and **nearly 20% directly oppose it**, believing that “love should not be intervened by algorithms”.

“When you meet your match in person, they are a far cry from what they labeled themselves online.”

– KIKO (pseudonym), who was once addicted to using dating apps and eventually chose to uninstall them.



Source: DT Finance and Economics & Youku, 2022

Young Chinese think it is important to give gifts in relationships

However, up to 54% of them find it difficult to choose the right gifts as they contemplate if the receiver will like the gift or not

It is **important to send each other gifts as an expression of love**, which can enhance the sense of security and intimacy.

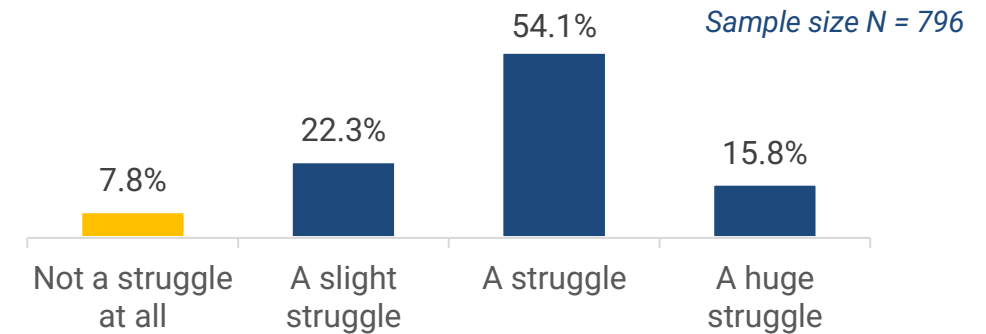
80% of surveyed college students think it is important for couples to send each other gifts

Young people are not financially well off. **Exchanging gifts can add to the financial burden**, thus making it not important.

Source: Youth of China, 2022

Around 70% of the youth struggle when selecting a gift

The youths' attitude towards gifts selection



Why they struggle?

- Whether the gift receiver will like it or not (67.6%)
- Whether one can show their love through the gift (50.6%)
- Whether both parties will be embarrassed due to the price or quality of the gifts (47.2%)

A new approach to gifting – spending money together on dates

There are apps such as SuiShouJi (随手记), LianAiJi (恋爱记), XiaoZhuCunQian (小猪存钱), etc. and mini-programs such as Couple's Little Bag in Alipay that support couples' joint savings and spending.

Jewelry is more than just a romantic gift

Jewelry sellers are marketing diamond rings as a testimony of “true love” among couples and a gift of “self-love” among single customers.



Structural changes in Chinese marriage:



The upgrade in jewelry consumption offset the impact of decline in marriage rate

- With the increase in per capita disposable income, people pay more attention **to the color and clarity of the diamond** and are **less sensitive to the price**.
- In 2020, the average transaction value of diamonds sold for wedding rings **increased by 5%-10% year-on-year** in Mainland China.
- Thus, the consumption upgrade can offset the impact of the decline in the marriage rate to a certain extent.

Diamond rings serve other purposes among single customers – as everyday wear



AM艾慕珠宝定制 关注
把这两只焊在手上！香奈儿coco叠戴蛇戒
宝格丽蛇戒一直都好爱❤️这只是玫瑰金，满钻蛇戒炒鸡闪亮 满钻薄圈，搞事业的小姐姐的心头爱！
今天偷戴了香奈儿的coco crush，这真是黄金色，好特别，出去吃饭排队被问了好几次 又被又问，越看越喜欢

"Full of diamonds, full of earnings. (In Chinese, the pronunciation of 'diamonds' (zuān) and 'earning' (zhuàn) sound similar.)"

- As the number of young single women with professional careers rises, the occasions for jewelry consumption are changing.
- Jewelry such as a diamond ring is no longer limited to being a gift for a romantic marriage partner, but also could also be given as a sign of **love for family, friends, and self-love**.
- The jewelry consumption due to marriage accounted for only half of the total jewelry in 2021 as estimated by Hong Kong Jewelry Manufacturers' Association.
- **The positioning of diamond jewelry** has also gradually shifted from jewelry for marriage to **jewelry for everyday wear**.

Source: Hong Kong Jewelry Manufacturers' Association, 2022; HKTDC.com, 2021

Attitude towards sex



Photo: Xiahongshu user @Gugu

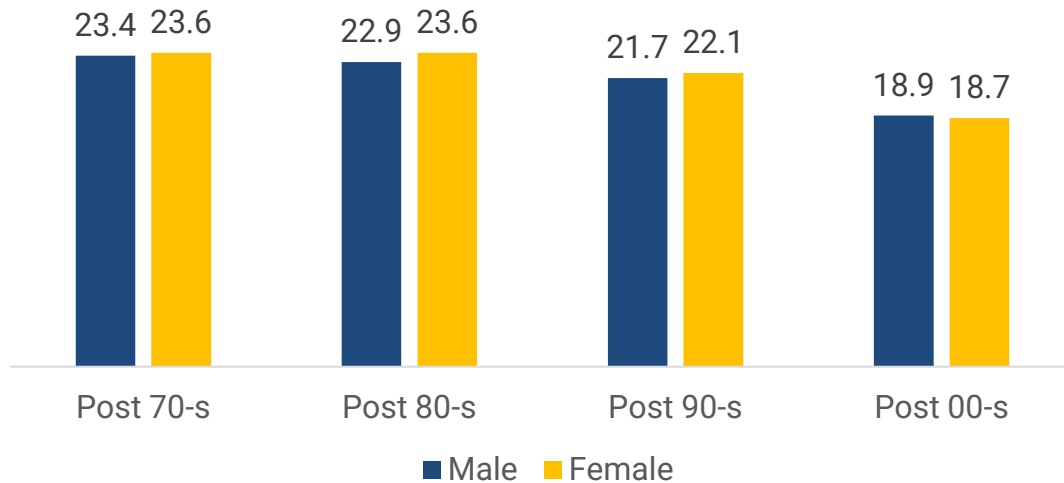

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Young people in China are able to talk about sex without prejudice

The survey by a leading matchmaking site, Jiayuan, showed that the average age of first sexual intercourse has lowered in China. Sexual awareness raised the expectations of Chinese where up to 90% of married couples regard a harmonious sex life as crucial to their marriage.

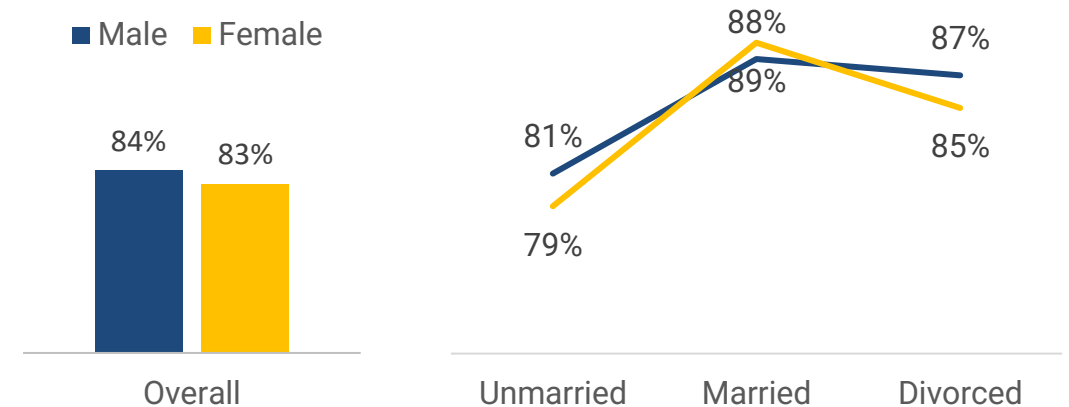
Young Chinese are having sex at an earlier age

Average age at first sexual intercourse



Regardless of gender and marital status, most people believe that sex is important in achieving marital happiness.

How important is harmonious sex life in a happy marriage?



Sample size N = 9,870

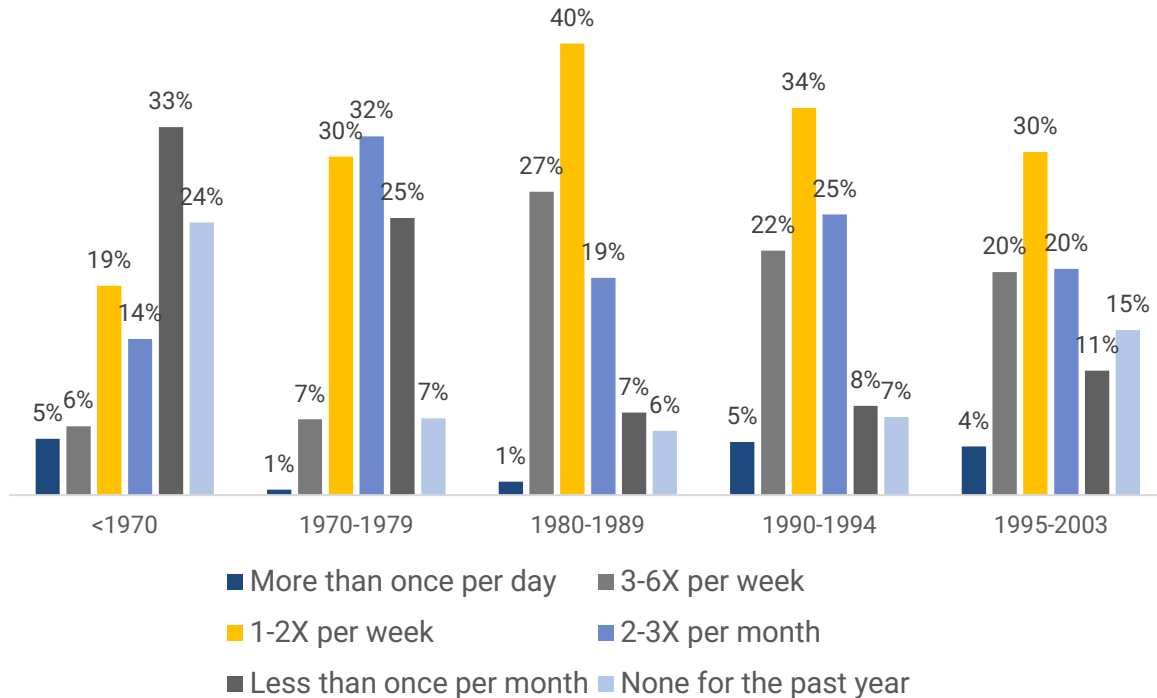
Source: Jiayuan (世纪佳缘), 2022

Due to long hours at work, the sexual frequency of millennials takes a toll

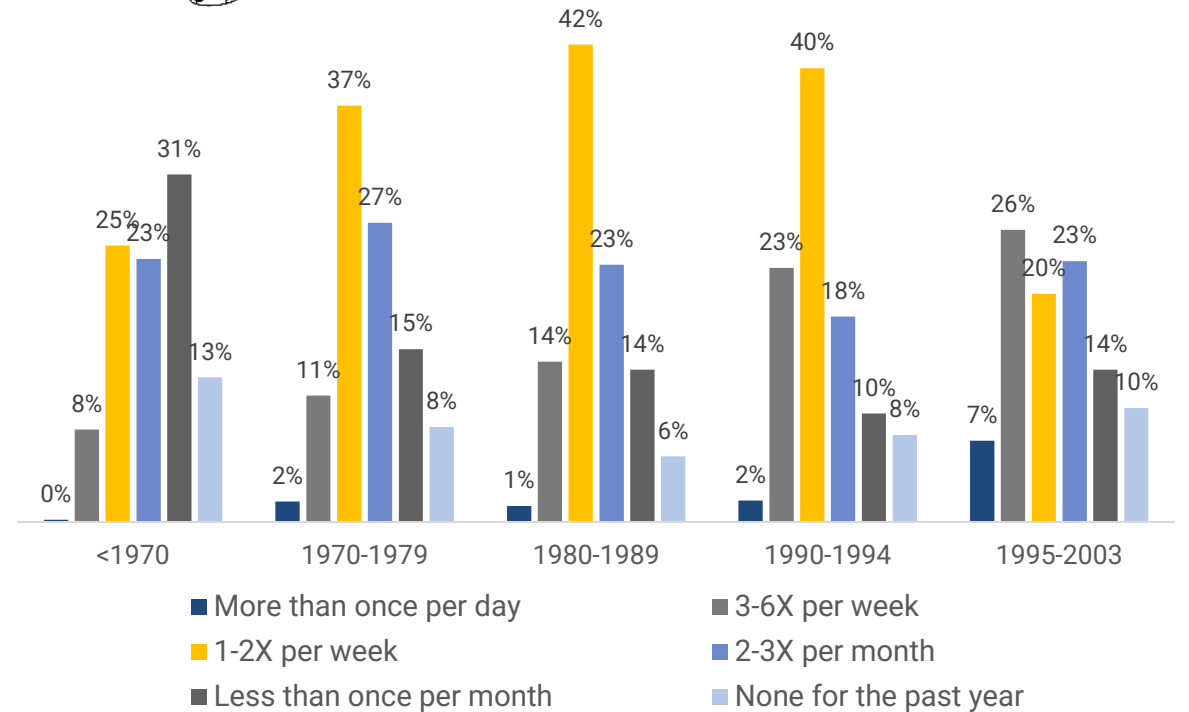
Contrary to the belief that young people tend to be more sexually active, the research carried out by Peking University showed that sex may be losing its appeal among young people in China, about 6-8% of them did not have sex over the past year.



Sexual frequency of Chinese men



Sexual frequency of Chinese women



Sample size N = 6,828

Source: Chinese Journal of Sociology, 2022

Hypotheses on the evolution of relationships in China

Non standard-nuclear families are becoming more accepted as divorce and remarriage becomes more common.

As relationships are no longer an economic necessity for women, they are able to be more picky about their partners, and choose people who bring value into their life, which leads to marrying later.

As the birth-rate declines, the taboo around adopting children could break down.

Women's spending will play an increasingly important role, even in traditionally male-consumer markets like real estate and cars, whereas previously, women's time and money was spent on house-hold purchases, but also in jewelry.

While people are getting married later, it also means they are dating longer, creating more markets for courting, including apps, 相亲 (courtship) services, restaurants and gifted products.

Being unable to find a woman is a very real fear of a lot of men, especially in rural areas with a strong gender imbalance. This could lead to social isolation and shame, and possibly social unrest among this demographic.

ABOUT



Our mission is to guide businesses to holistic growth in Asia

Through our market research and strategy consulting, we equip businesses with the knowledge and guidance to achieve growth in China and beyond

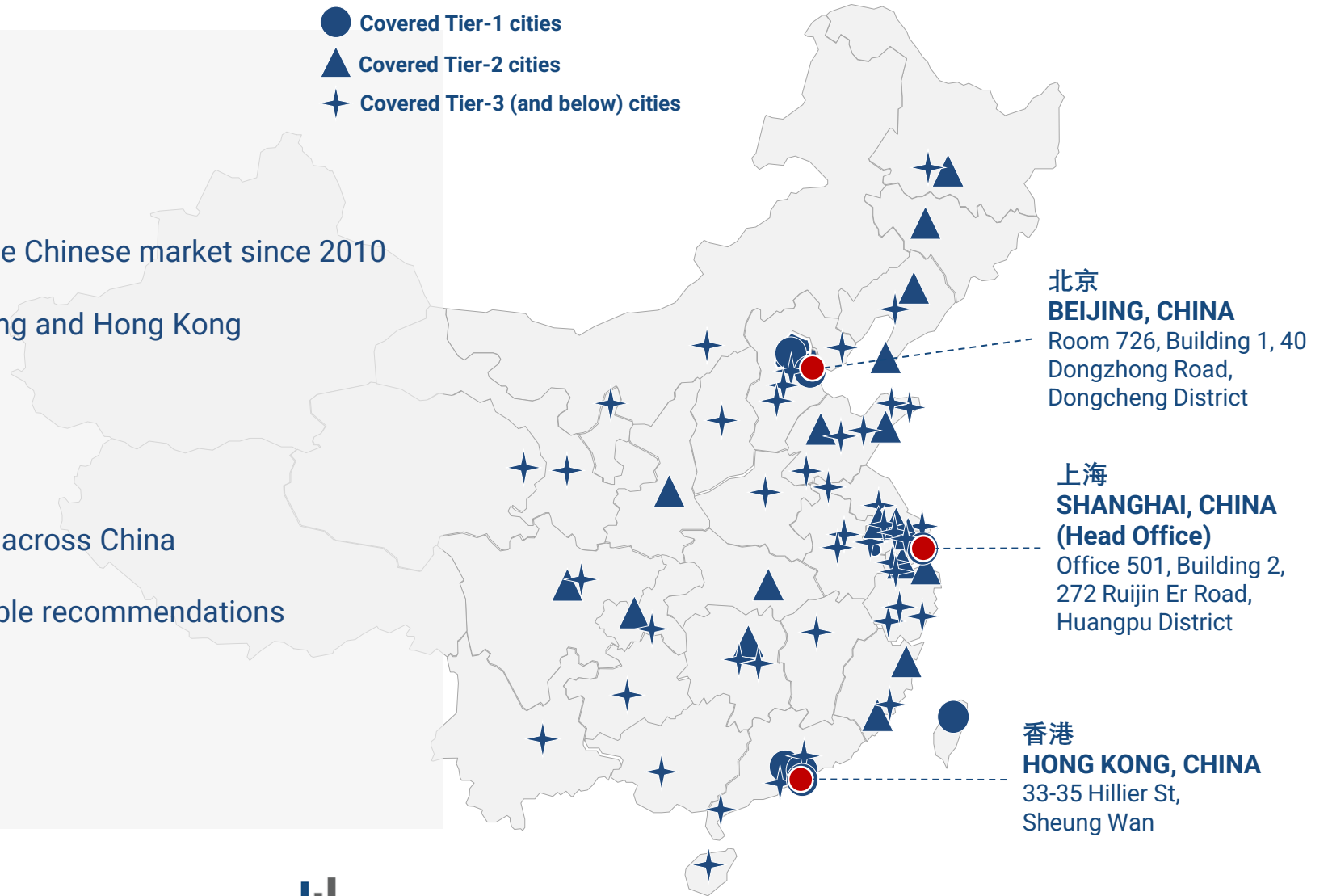
Who We Are

Your Market Research Company in China

We are **Daxue Consulting**:

- A market research firm specializing on the Chinese market since 2010
- With 3 offices in China: in Shanghai, Beijing and Hong Kong
- Employing 30+ full-time consultants
- Full, complete, national coverage
- Efficient and reliable fieldwork execution across China
- Using our expertise to draw precise, reliable recommendations
- With key accounts from around the world

- Covered Tier-1 cities
- ▲ Covered Tier-2 cities
- ✦ Covered Tier-3 (and below) cities



The values we embrace



Our clients' goals are our goals

We see ourselves as an extension of the client's business in China or their target country, hence, we advise them as if we were in their shoes and investing along with them.



Embrace change enthusiastically

Similar to how markets are constantly changing, our mindset is also always evolving. We value routine only when it helps us improve and we value change because it helps to keep pace with our time.



Intellectual humility gives clarity

Only through the lenses of humility can knowledge be seen clearly. At daxue consulting, we are humble toward science and the truth. We interpret data in a way that lets it speak for itself, even if contradicts our hypothesis.



Freedom enriches creativity & responsibility

Freedom to manage and envision her or his mission increases the sense of responsibility to that mission.



Knowledge is meant to be shared

While our projects team dives deep to provide catered research to clients, the media team shares insights publicly. At the same time, we foster a culture of sharing knowledge in our team, each individual works to increase their own knowledge and freely shares ideas each other.

What we do



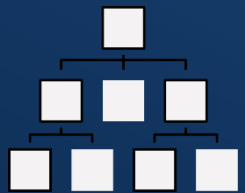
Market research

Our China market research services leverage both qualitative and quantitative methods across a broad range of industries sectors to fuel your strategic plan and support your expansion in China.



Strategy consulting

Our team can provide you with a wide selection of consulting services aimed at supporting your strategic decisions in China.



Management consulting

Our consulting service aims to give you both a clearer understanding of any aspect of your business, as well as a comprehensive overview of your target market.



Branding

Through using a set of different methodologies, our international team of market managers can answer your branding issues and support your growth in China.

Our services and methodologies



Desk research



Tribe marketing



Employee engagement survey



Persona definition



Brand positioning



Expert interviews



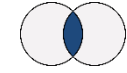
Market sizing



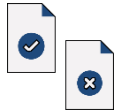
Online & offline surveys



Lean management



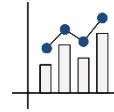
Co-branding strategy



A/B testing



Focus groups



Online data scraping



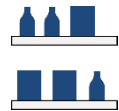
Activation toolkit



Sensory research



Tech-assisted research



Store checks & mystery shopping



Social listening



Brand naming



Market entry

Our past and current clients

400+ clients with 600+ projects for the past 10 years

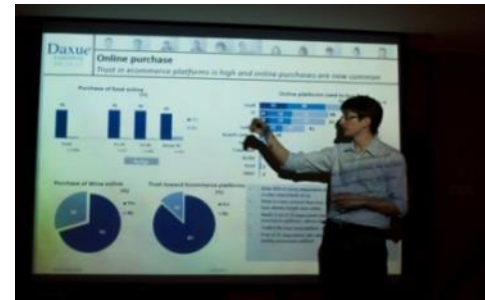


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