



China briefings

Socio-cultural transformations: attitudes and behaviours around consumption



Photo:
Chinese New Year
celebrations
Jeffrey Del Viscio
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Summary

Attitudes to food are complex and multifaceted. Concerns about food safety are a major public preoccupation while awareness of nutritional wellbeing, environment and animal welfare issues are on the increase, particularly among more affluent consumers. At the same time, with rising affluence and exposure to global media and markets, people are embracing more materialistic lifestyles, lifestyles that are associated with more resource intensive forms of consumption. It remains to be seen how these diverse influences and attitudes will play out in coming years, and what impact they will have on evolving food policy and consumption patterns.

This brief describes three underlying trends in attitudes that may shape the Chinese food system's future direction: attitudes toward consumption and consumerism; growing concerns about food safety and health; and concerns about the environment

and animal welfare. Owing to the limited data available on attitudes and values of Chinese consumers, and the usual caveats that apply to social sciences research, the findings in this brief are more speculative than others in this series.

CHINA BRIEFINGS
OVERVIEW OF CHANGES
AND DRIVERS IN CHINA'S
FOOD SYSTEM

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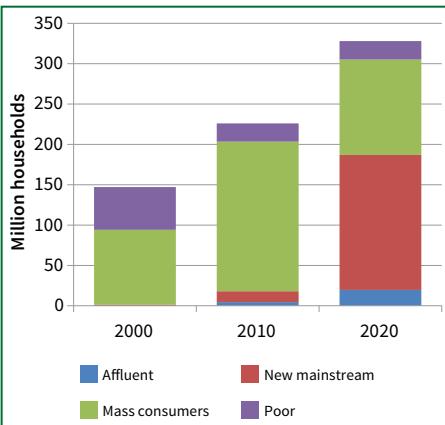
Written by Huw Pohlner based on Garnett, T. and Wilkes, A. (2014) *Appetite for change: Social, economic and environmental transformations in China's food system*.

With thanks to the authors for additional comments and corrections.

Attitudes toward consumption

- McKinsey's 2012 Annual Chinese Consumer Report segments Chinese urban consumers into four categories: affluent; new mainstream; mass consumers; and poor (Figure 28).
 - In 2010, about 80% of urbanites were classed as mass consumers, for the most part only able to afford basic commodities.
 - McKinsey predicts that the proportion of more affluent 'new mainstream' consumers will grow from 6% of the urban population in 2010 to over 50% by 2020, with huge implications for consumer spending potential.
- Brands are becoming increasingly important in China, and sectors experiencing rapid growth in demand include ready meals, confectionery, dairy products and imported alcoholic drinks.
- It is not clear whether future consumption trends will tend toward greater materialism, or towards more purportedly 'altruistic' value sets, or both; the large-scale environmental and other consequences of these possible attitudinal trends are also under-researched.

Figure 28: Projection of urban households by consumer type, 2000-2020



Source: Atsmon Y, Magni M and Li L. (2012). From Mass to Mainstream: Keeping Pace With China's Rapidly Changing Consumers: 2012 Annual Chinese Consumer Report. McKinsey.

For a more detailed discussion, see the original report here.

A 2010 study found that 83% of Chinese consumers felt that it was important to find more excitement and sensations in life, compared to a global average of 64%.

Growing concerns about food safety and health

- Several surveys conducted since 2010 show that food safety concerns rank very highly on ordinary people's list of public concerns.
- Preference for imported food brands often reflects concerns about the safety of domestically produced goods, rather than materialistic aspirations.
- Concerns about food safety are greatest amongst women, people with higher educational levels, the elderly (possibly because they are more vulnerable), and married couples (perhaps because they are more mindful of impacts on children).
- Although genetically modified foods (GM) have generated heated debate elsewhere, recent academic surveys indicate that the largest group of respondents in China have no opinion on the matter; many do not know whether they have bought GM foods in the past.
- Diet has long been considered crucial to the maintenance of good

health and curing of disease in China, and a rapidly growing health food market both in Traditional Chinese Medicine and in ‘modern’ health products indicates this remains an important influence on consumption habits among some sections of the population.

Concerns about the environment and animal welfare

- Two international comparative surveys conducted in 2012 find that the environmental motivations of Chinese consumers are quite high, perhaps due to clear evidence of air and water pollution and its tangible impacts on people’s wellbeing in China.
- Vegetarian restaurants are increasing in number in major cities (albeit from a very small base); this may be for a range of reasons, including a resurgence of Buddhism and a demand for new tastes, and not only as a response to food safety and health concerns.
- Animal welfare concerns have not been a major motivating factor affecting Chinese consumption decisions to date, though the number of animal welfare NGOs is increasing and recent opinion surveys point to a growing awareness of the issue.

Future trends

- Many Chinese consumers are still on low or lower middle incomes, and concerns about price are likely to conflict with those around the environment or health.
- It is not yet clear whether greater awareness of the health and domestic and global environmental impacts of consumption will be sustained as China develops, and if so, whether these attitudes will be reflected in actual consumption choices.
- The often dramatically different life experiences of young Chinese people, in comparison with their parents and/or grandparents, may change the profile of dominant attitudes and habits around food in future decades.

Policy implications

- 1 Rising incomes and an openness to new food experiences indicate that food consumption patterns may change and demand for a more diverse range of food products will continue to grow.
- 2 Food safety concerns among the public have emerged as a driver of change in China's food system. Recent responses include stronger government regulation, closer integration between enterprises along supply chains, the development of food certification schemes, and increased demand for imported brands in some product markets (e.g. powdered milk).
- 3 Further public debates on GM foods in China could be supported by more public education and consumer engagement on the topic.
- 4 The degree to which the apparently high environmental motivations of Chinese consumers are expressed through consumption decisions in the future could be a major factor shaping the future of the food system. More policy-relevant research is required to clarify whether sustainable outcomes can be achieved simply by influencing consumer attitudes to consumption.
- 5 Enabling people with low incomes to make sustainable choices about food (and other purchases) is a priority if policy is to contribute to preventing the widespread adoption of the unsustainable consumption practices that took root in most developed nations during the processes of urbanisation and industrialisation.

FCRN China briefings



Overview of changes and drivers



Supply chain transformations



Environmental transformations



Health transformations



Socio-cultural transformations



Focus on livestock



Focus on dairy



Focus on aquaculture



Summary, conclusions and policy implications

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