

May 2022

IP和授权产品 - China

“随着消费者对中国文化的自信心和兴趣日益增长，中国IP搭乘国潮趋势，取得了长足发展。此外，盲盒作为一种创新的营销和销售方式，为IP商业化开辟了一条新的道路。国内外的IP创作者和运营商必须意识到并理解消费者对IP不断变化的兴趣和态度，并推出能够真正与消费者产生共鸣及联系的产品和体验。”

— 赖江怡，研究分析师

March 2022

全渠道零售 - China

“消费者在通过不同渠道了解信息和购物方面已经形成了相对稳定的模式。线上渠道的渗透率增速正在放缓，而线下渠道的客流量迎来增长。当前，品牌和零售商应将重心转向提升消费者的购物体验和培养用户忠诚度，如保持线上和线下渠道在关键维度上的一致性，以及通过实质性福利推动会员注册和续费。”

— 姚缤妍，研究分析师

IP and Licensed Merchandise - China

“With growing confidence and interest in Chinese culture among consumers, Chinese IPs have witnessed decent development by riding the guochao trend. What's more, mystery boxes, an innovative marketing and sales approach, have opened up a new avenue for IP commercialisation. It is essential that IP creators and operators, both international ...

Omnichannel Retailing - China

“Consumers have established ways of shopping and searching for information across different channels. Online channels' penetration is slowing down, while offline channels are gaining footfall. At this moment, brands and retailers should shift the focus to enhancing shopping experiences for consumers and cultivating customer loyalty by maintaining consistency across key ...

February 2022

消费意愿 - 下半年 - China

“中国经济稳步复苏的趋势仍未改变。尽管下半年消费者财务状况和信心略有下滑，但新冠疫情的影响预计将有所减弱。消费者追求更优质的生活，悦己型和自我犒劳型消费的优先级提高。未来，情感共鸣将成为重要的消费驱动力，品牌应特别予以关注。”

— 张鹏俊，研究分析师

January 2022

Consumer Spending Sentiment - H2 - China

“The trend of a stable recovery of China’s economy remains unchanged. Although the financial situation and confidence of consumers has declined slightly in the second half of the year, the impact of the coronavirus outbreak is expected to be alleviating. As consumers pursue a higher quality of life, self-enjoyment and ...

Elevating Shopping Experiences - China

“The development of technology has brought impetus to the experience elevation. Technologies represented by AR and AI are bringing a distinctive Metaverse shopping experience, and even making physical store shopping activities more immersive. Private traffic management is gaining more attention. Some retailers have already begun to change their thinking, paying ...

November 2021

Fresh Grocery Retailing - China

“Continued income growth and a focus on healthy eating will promote the sustainable development of fresh grocery retailing. Amid increasingly fierce market competition, the penetration rate of emerging channels is constantly increasing. At the same time, traditional channels are innovating to attract traffic. Targeting the needs of segments and exploring ...

October 2021

Mother and Baby Products Retailing - China

“Premium product and professional service are what most young post-90s born parents are chasing. Most of them are highly educated, open-minded, aesthetically pleased and like to try something new. They love sharing ideas and experiences through online community and learning parenting advice from different channels. Brands should devote their efforts ...

提升零售购物体验 - China

“科技发展为体验提升注入动力。由AR和AI代表的科技提供独特的元宇宙购物体验，让实体店购物活动更具沉浸感。私域流量管理正在得到更多关注。一些零售商已经开始转变思维，关注老年人和宠物主人等特定客群。”

— 张鹏俊，研究分析师

生鲜零售 - China

“消费者收入持续增长并关注健康饮食，这将推动生鲜零售可持续发展。在日益激烈的市场竞争中，新兴渠道渗透率不断提高。与此同时，传统渠道积极创新以吸引流量。零售商可以瞄准细分需求、探索子品类机会，从而迎来新的增长点。”

— 姚缤妍，研究分析师

母婴零售 - China

“大多数90后的年轻父母追求高端产品和服务。他们大多受教育程度高、心态包容、重视颜值、喜欢尝试新事物。他们热衷于在线上社群分享想法和体验感受，并通过不同渠道了解育儿知识。品牌应努力与这些年轻父母建立情感联系并赢得他们的信任，让他们在这一特殊时期能省心、安心。”

— 赖江怡，研究分析师

September 2021

社交电商 - China

“社交电商市场增长陷入停滞，今年消费者参与率没有明显扩大。依赖于社交关系的营销手段似乎也已触达瓶颈。社区团购作为社交电商的形式之一，在疫情期间获得关注并吸引了互联网巨头纷纷涌入。政府的监管措施将有助于该行业健康发展，并促使头部品牌更注重提升消费体验，从而带动增长。”

— 张鹏俊，研究分析师

August 2021

Social Commerce - China

“The social commerce market’s growth is stagnant, with no significant expansion in consumers’ participation this year. Marketing methods dependant on social relationships seem to have reached a ceiling. Community group buying, a format of social commerce, earned attention during the outbreak and attracted internet giants who rushed into the market ...

消费意愿——上半年 - China

“中国消费者的存款习惯依然根深蒂固，同时他们也在积极探索新的收入来源。通过直播带货等新兴行业来赚取收入就是一个很好的例子。受访者对于未来的长期信心和短期信心均有显著提升。这表明，随着疫苗普及率的逐渐提升和经济的强劲复苏，中国消费者正逐步摆脱疫情阴影。关注银发经济与宅经济等新兴趋势，或可帮助品牌开辟更多商机。”

— 张鹏俊，研究分析师

May 2021

美容零售 - China

“新冠疫情爆发后，消费者不断转向线上，但对线上和线下渠道产品质量和价格的认知存在差异明显。实体店需要提供指导和体验式的产品服务，与消费者建立紧密联系；线上平台则需要联手品牌活动，成为品牌的合作伙伴。直播电商的发展应有利于线上渠道突破仅凭竞争性价格立足的僵局，开创品牌认可的新格局。”

— 周文棋，研究分析师

April 2021

Beauty Retailing - China

“Consumers are continuously shifting towards online in the wake of COVID-19, but the differential in the perceived quality of products and prices between online and offline channels are marked. Physical stores need an educational and experiential offering to connect with

直播带货 - China

“直播带货利用的是大众消费者对促销和打折的热情，也利用品牌将直播带货作为一大重要营销渠道这一点。直播带货不仅拥有人气，预计还会迎来更多监管，以确保其健康发展。长远来看，直播带货将进一步渗透到消费者的日常生活中，成为购物与娱乐的一个关键渠道，为消费者和品牌双方都带来更大的价值。赋予直播带货以新的方式将



Retail: Overview - China

consumers, while online platforms need to team up with brand ...

给消费者带来非凡的购物体验。”

— 张鹏俊，研究分析师

March 2021

Live Streaming Commerce - China

“Live streaming commerce leverages mass consumers’ enthusiasm for promotions and discounts as well as brands’ focus on it as a key marketing channel. Along with the popularity, live streaming commerce can expect more regulation to ensure healthy growth. In the long run, live streaming commerce will further penetrate consumers’ daily ...