

March 2021

科技意见领袖 - China

“在科技行业内，科技KOL在拉动科技产品购买方面的影响力颇具争议，但该群体也不可避免地加强了品牌营销。该群体对较年轻的消费者更具影响力，具体来说是通过关注性价比高的产品以及让科技类信息更具娱乐性这两个途径实现。KOL在提供可靠专业的信息上与消费者产生的共鸣最强，而非‘个性’方面。”

— 许昕远，研究分析师

February 2021

数码趋势——三季度更新 - China

“新冠疫情并没有阻止中国的数字化进程。疫情在方方面面改变了消费者的消费习惯。直播的兴起重塑了整个电商行业的形态。在医疗行业，健康监测的理念和线上医疗平台的兴起成为加快线上医疗产业发展的催化剂。行业需要深思如何赢得用户信任，从而维持自身生态系统的用户流量。”

——张鹏俊，研究分析师

January 2021

Technology Influencers - China

“Within the technology industry, technology KOLs have a debatable influence in terms of driving technology purchases, but are unavoidable to enhance brand marketing. They are more influential with younger consumers specifically by focusing on value-for-money technology products and to help make technology based information more entertaining. KOLs resonate best with ...

智能家居 - China

“智能家居市场虽受新冠疫情的影响，但仍保持积极的增长前景。过去4年中，该市场保持稳定增长，消费者的设备升级意愿、物联网科技和5G应用的渗透，都是驱动市场增长的动因。整体而言，该市场仍处于发展初期阶段；智能安防、智能灯具和智能家电等细分将驱动市场创新前行。”

— 许昕远，研究分析师

数码趋势——四季度更新 - China

“2020年4个季度中，智能音箱的渗透率保持增势，这得益于英敏特城市精英人群对该品类的接受度提升。听觉体验是品牌把握未来增长机遇的关键。年轻消费者（如Z世代）并非带动市场增长的灵丹妙药。VR设备等高端数码设备或许要重新审视目标人群和定位策略。”

— 赵凌波，高级研究分析师

Digital Trends - Q4 - China

“Driven by Mintropolitans, smart speakers have improved penetration throughout the four quarters in 2020. Acoustic experience is to highlight for capturing future growth opportunities. Young people (eg Gen-Zers) are not the panacea. High-end digital devices, such as VR devices, may want to re-examine the targeting and positioning strategies.”

— ...

December 2020

Digital Trends - Q3 - China

"COVID-19 has not stopped the process of digitalization in China. It has changed consumers' consumption practices in all walks of life. The rise of live streaming has reshaped the entire e-commerce industry. In the medical industry, the concept of health monitoring and the rise of online medical platforms have become ...

电子竞技 - China

“新冠疫情减缓了以粉丝为基础的收入增长，但增加了游戏数量，这将是电子竞技行业未来发展的良好资产。与传统的体育赛事相比，电竞的线上过渡更为容易。就团队之间的竞争而言，消费者对电竞的看法与传统体育相似。鉴于电竞的商业模式尚处于起步阶段，联盟和团队仍在探索品牌塑造、竞赛和社交观看的新方式。”

— 许昕远，初级研究分析师

November 2020

E-sports - China

"COVID-19 has slowed fan-based revenue growth, but boosts gaming number which will be a good asset for esports industry going forward. Compared to traditional sports tournaments, esports had an easier transition online. The perception of esports is similar to traditional sports in terms of the competitiveness between teams. Considering the ...

数码趋势——二季度更新 - China

“新冠疫情成为加速中国数字化社会发展的催化剂。人们的工作和娱乐不断趋于数字化。新冠疫情带来的短期挑战并未阻止人们接受更多数码产品，人们对数码产品的使用率反而有升无降，并且更加认可数码产品在生活中扮演的重要角色。对短视频产业而言，娱乐至上的精神带来了前所未有的机遇。该行业需要深入探索如何在满足用户体验需求的同时将内容变现。”

— 益振嵘，品类总监

October 2020

Smart Home - China

"The smart home market retained a positive outlook under the influence of COVID-19, as the market has continued to grow at a steady speed over the past four years, fuelled by consumers' willingness to upgrade their devices, IoT technology and the 5G applicable penetration. Overall, the market is still at ...

手机和网络运营商 - China

“中国有可能引领5G收入增长。消费者升级意愿强烈，主要集中在诸如手机运行更流畅、可使用5G和质量更好等关键特征方面。就数据流量升级而言，运营商更注重为消费者拓展5G应用场景，提供更多数据流量和额外的通话时间。”

— 许昕远，初级研究分析师

Mobile Phones and Network Providers - China

“China is likely to lead the 5G revenue uplift. Consumer upgrade intentions are strong, focusing on key features such as smoother operating experiences, 5G enablement, and higher quality. As for data plan upgrades, operators will focus more on expanding the 5G use scene for consumers with more data plans and ...

September 2020

在线学习 - China

“中国人口中4-12岁的儿童占比13%，其中30%目前是在线学习平台的用户。全国范围内新冠疫情隔离措施带动家长接受在线学习，以应对这一不利情况。长期来看，家长在孩子教育上的消费优先性将是在线学习市场向前发展的驱动力。本报告讨论了家庭采用在线学习的重要方面，包括对内容、态度和行为的分析。

— 许昕远，初级研究分析师

可穿戴产品 (含新冠疫情分析) - China

“尽管2020年开始得跌跌撞撞，中国可穿戴设备市场仍坚韧不拔，保持着顽强的斗志。由于新冠疫情的爆发，消费者使用健康数据的意愿陡增。可穿戴设备的销售量或将因此而提升。一方面，健康和医疗使用场景是可穿戴设备市场开发时的重要突破点。另一方面，产品定位正在发展出更多具体细分，迎合不同年龄段群体。这将帮助品牌在激烈竞争中脱颖而出。”

许昕远，初级研究分析师

August 2020

Wearable Devices (Incl Impact of COVID-19) - China

“Despite a bumpy start to 2020, China’s wearables market has remained resilient and in good fighting spirit. Consumers’ willingness to engage with their health data is spiking due to the COVID-19 outbreak. This will likely result in higher sales volumes of wearable devices. On the one hand, the health and ...

April 2020

数码趋势——一季度更新 - China

Digital Trends - Q2 - China

“COVID-19 has become a catalyst for accelerating the digital society in China. People’s work and entertainment are constantly moving towards digitalization. The short-term challenges associated with the virus has not stopped people from accepting more digital devices, but instead has made increased usage and the recognition of their importance ...

E-learning - China

“About 13% of China’s total population are children aged 4-12 years old, 30% of which are current users of e-learning platforms. Nationwide COVID-19 quarantine measures drove families to embrace e-learning to cope with this adverse situation. In the long term, parents’ priority to spend on their children’s education will be ...

Digital trends - Q1 - China

“在2020年第一季度，游戏机的拥有率增长最快。具体而言，90后和70后是推动这一增长的两大代际。商业5G用户尚未准备就绪。由于具有破坏性的新型冠状病毒肺炎（以下简称“新冠肺炎”）的爆发，消费者一直在推迟产品升级。随着电商和在线学习的推动，直播商务市场不断出现新的内容，娱乐、专业性、同侪压力成为三大成功要素。”

— 许昕远，初级研究分析师

“Observed in Q1 2020, the biggest ownership growth is in gaming console. In specifics, post 1990s and post 1970s are the top two generations driving this increase. Commercial 5G users are not ready. A result from the disruptive COVID-19 outbreak, consumers have been delaying their product upgrades. As the livestream ...

March 2020

Z世代科技产品使用习惯 - China

Z世代伴随着不断地数字化探索长大，他们拥有各种各样的科技产品，并喜欢在屏幕之间切换以享受各种网上活动。看电视剧/电影和玩网络游戏在所有屏幕上仍很受欢迎。由于Z世代的注意力分散在不同的平台和屏幕上，广告商应更关注如何立即抓住他们的眼球，而不是简单地覆盖尽可能多的数字媒体渠道。随着社交媒体主导科技产品的使用，Z世代高度依赖这些平台与世界保持联系，但由于他们感到社交障碍的同时又对网络上瘾，品牌在促进健康的网上行为方面应承担更多责任。”

— 王瑾瑜，初级研究分析师

Technology Habits of Gen Z - China

“Having grown up with constant digital exposure, Gen Z owns a wide range of digital devices and favours switching between screens to enjoy various online activities. Watching TV series/movies and online gaming remains popular across all screens. As Gen Z's attention has been distributed across diverse platforms and screens ...

February 2020

手机APPs - China

“当出现能进一步提供便利性的app时，消费者可能会轻易地转移注意力，然而，他们也高度警惕个人数据的所有权。在制定成熟的数据隐私相关政策方面，中国走在世界前列，因此手机app开发商面临着竞争更加激烈的市场，消费者期待这些企业提供即时的优质内容、科技型创新和安全的用户体验。”

— 许昕远，初级研究分析师

Mobile Apps - China

“Consumers may be easily converted when it comes to apps that can provide further convenience, yet they are also hyper-vigilant about the ownership of personal data. As China leads the world in developing mature data privacy-related policies, mobile app developers are left to face a more intense market, expected to ...