

## 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。”

— 姚滨妍，研究分析师

## 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 ...

## 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 ...

## 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

## 大家电 - China

“健康化已成为大家电日趋重要的升级方向。在日益激烈的市场竞争中，提供差异化解决方案以满足不同细分群体的健康需求将为品牌带来新的增长机遇。长远来看，智能化产品将成为品牌的必争之地。品牌需投资于消费者教育以提升他们对新科技的认知和信心。”

— 姚滨妍，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 ...

#### Major Domestic Appliances - China

“Health has become an ever more important direction for the upgrade of major domestic appliances. Amid increasingly fierce market competition, providing differentiated solutions to meet the health demands of diverse groups brings new growth opportunities for brands. In the long term, products with intelligent functions are the next frontier of ...

#### 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。”

— 姚滨妍，研究分析师

#### 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

#### 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 ...

#### 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

### 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 ...

### 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

#### 厨房小家电 - China

“厨房小家电通过生活品质和健康理念与消费者建立联系。尽管人们仍面临新冠疫情带来的挑战，但这一趋势将延续下去。市场不断细分，新产品也持续涌现。激烈的品牌竞争令消费者受益，并推动产品渗透率逐步增长。不论是在电商还是实体零售店，消费者都更注重购物之旅中的产品体验。这将推动品牌进行零售和营销的差异化竞争，以求获得消费者忠诚度的优势。”

— 益振嵘，品类总监

#### 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 ...

#### Small Kitchen Appliances - China

“Small kitchen appliances build links with consumers through the ideas of quality of life and health. This trend will continue, although people still face challenges from COVID-19. The market is constantly subdivided, and new products are constantly emerging. The fierce brand competition provides benefits for consumers and drives the product ...

### June 2021

#### 家居生活与清洁电器 - China

#### Household & Cleaning Appliances - China

“随着消费者的需求更加多元化和新兴，家居生活与清洁电器也在向多元化方向发展。无论是单身人士、宠物主人还是有孩子的家庭，消费者购买家居生活与清洁电器的目的各有不同，这给品牌带来挑战，即要创造不同的产品细分以迎合这些多元化的使用场景。无论如何，随着消费能力的提升和健康生活方式的意识不断增强，中国家居生活与清洁电器市场将继续保持稳健增长。”

— 益振嵘，研究总监

## 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助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

### Personal Care Appliances - China

"Thanks to consumers' constant pursuit of healthier lifestyles and easier personal care treatment, the China personal care appliances market has thrived in the past few years and may continue to expand at a steady pace going forward. E-commerce has accelerated product penetration and lowered the barrier to new products entering ...

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

### 家居零售 - China

"With more diversified and emerging needs from consumers, household and cleaning appliances are also moving forward in a path of diversification. Whether they are single people, pet owners or families with children, consumers have their own reasons for buying household and cleaning appliances, which poses challenges for brands to create ...

### 个人护理小家电 - China

“得益于消费者对更健康生活方式和更便捷个人护理的不懈追求，中国个人护理小家电市场在过去几年蓬勃发展，并且有望继续稳步向前。电商加速了产品在市场上的渗透，并降低了新产品进入市场的门槛，尤其是随着直播带货的兴起和全渠道购物体验的提高，个人护理小家电市场欣欣向荣。随着“她经济”的兴起，个人护理小家电市场已开发出更加多样化的产品来满足女性的新兴需求，例如专业级的效果，这促使品牌创新设计出更可靠和强大的功能，并打造更人性化的产品。”

— 吴梦莹，研究分析师

### 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给消费者带来非凡的购物体验。”

— 张鹏俊，研究分析师

### 对家居环境的态度 - China

“疫情后，家对于人们来说承载了更多意义，并成为多功能空间。随着新兴生活方式需求的出现，消费者更关注能提供健康、身份认同和优质体验的家居产品。家居零售品牌可借此契机，利用先进科技帮助消费者应对日新月异的品类环境，并成为消费者重要灵感来源，甚至是深受信赖的顾问。若品牌能成功做到这一点，那么未来家居零售市场将迎来进一步增长。”

— 吴梦莹，研究分析师

“随着整体住房条件的改善，中国消费者更渴望通过家居设计来实现和表达自己对特定‘生活方式’的追求。消费者在基本的居住需求外，更加注重全面的身心健康，尤其是在新冠疫情爆发后。从健康相关的智能设备和环保材料到家庭娱乐系统，消费者愿意支付更多的钱来营造安全、轻松和愉悦的家居环境，这为家居品牌指明了未来的机遇所在。”

此外，多数消费者都愿意亲自参与家装设计，并且认为值得为有设计感的和限量版的产品支付溢价。品牌需要抓住机会，借助综合性营销渠道或主题（包括综合性生活方式展览、媒体赞助、文化活动和科技创新等），帮助消费者了解并探索自己的个性需求。”

— 邵愉茜，研究分析师

## March 2021

### Home Retailing - China

“Home has attained greater meaning after the COVID-19 outbreak and become a multi-functional space for people. With emerging lifestyle needs, consumers are paying more attention to home products that deliver health, identity and experience. Home retailing brands have a great opportunity to help consumers navigate the ever-changing category environment, leveraging ...

### Attitudes towards Home Design - China

“Along with improving housing conditions, Chinese consumers’ desire to achieve and express their ‘lifestyle’ through home design has never been higher. Beyond basic functionalities, holistic wellbeing at home has become a priority, especially in the wake of COVID-19. From health-related smart devices and sustainable materials, to home entertainment systems, consumers ...

### 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 ...