

April 2022

数码趋势——四季度 - China

“中国消费者在日常生活中高度依赖社交媒体App，因为这些App整合了丰富广泛的内容和各类数字服务。“体验感”在消费者使用社交媒体时显得尤为重要。因此，品牌应考虑借助VR（虚拟现实）/AR（增强现实）以及虚拟人等科技来提升用户体验。此外，疫情引发的不确定性和不稳定感促使消费者寻求掌控感，例如他们会主动在社交媒体平台上搜索自己所需的信息。品牌应该把握这个机会，了解消费者的需求、学习消费者的语言，从而实现有意义和有效的品牌沟通。”

— 赖江怡，研究分析师

March 2022

Digital Trends - Q4 - China

"Chinese consumers have become highly dependent on social media apps in their daily lives, driven by the wide-ranging content and various digital services integrated in those apps. Experience matters a lot to consumers when they use social media. Therefore, brands should consider leveraging technologies such as VR/AR and virtual ...

在线学习 - China

“‘双减政策’为K-12教育培训打上休止符，迫使大部分教育服务提供商纷纷将业务重心转向成人教育，带动成人在线学习市场加速发展。消费者的在线教育需求主要围绕职业发展和个人发展。有助于提升职场竞争力的课程和内容备受欢迎，其次是发展个人兴趣爱好。在线教育提供商应专注于更实用的内容，帮助消费者更好地应对工作与生活。尽管高质量的内容是首要考虑因素，但能提供互动性学习体验的平台/工具（如短视频、音频和直播）更容易赢得消费者青睐。”

- 董文慧，研究分析师

本报告涵盖的关键议题

February 2022

E-Learning - China

“Adult e-learning market experiences accelerated development when the “Double Reduction Policy” puts an end to K-12 tutoring, forcing most of the education service providers shift business focus to adult education. Consumers’ demand of online education mainly focuses on career and self-improvement. Courses and content to improve competence in workplace are ...

November 2021

手机 - China

数码趋势——三季度 - China

“激烈的竞争迫使手机品牌寻找脱颖而出的策略，它们要么通过利用5G拓展市场，要么以更多优质的设备和服务进军高端市场。但消费者的关注点正从产品的拥有感转移至用户的体验感。”

— 赖江怡，研究分析师

“数码品牌已进入生态竞争阶段。面对流量红利触顶的压力，业内参与者转向平板电脑、游戏及新能源汽车等新兴产业以寻求市场机遇。各数字平台争相抢占消费者的屏幕时间。其中，社交媒体继续游戏化，因为消费者倾向于认同有更多娱乐元素的社交互动。整个互联网市场已进入存量竞争阶段。相比流量，数码品牌应关注内容质量，以吸引消费者的关注。”

——张鹏俊，研究分析师

Mobile Phones - China

“Cutthroat competition has forced mobile brands to seek out strategies to stand out, either by expanding the market by leveraging 5G or venturing into the high-end market with more premium devices and services. But on the consumer side, the attention is transitioning away from products to the value of the ...

October 2021

Digital Trends - Q3 - China

“Digital brands have entered the stage of ecological competition. The pressure of peaking traffic has made industry players seek market opportunities in emerging industries such as tablets, games, and new energy vehicles. Various digital platforms keep fighting for consumers' attention among screens. Among them, social media continues to develop towards ...

September 2021

电子竞技 - China

“尽管2021年泛电竞参与者数量增长放缓，但英敏特对电竞行业长远前景充满信心。随着电竞行业发展和成熟，参与者需求会进一步分化。要满足铁杆粉需求并刺激其消费，专业服务的重要性日益突显，而非铁杆粉往往将电竞当成时髦的休闲娱乐活动。鉴于泛电竞参与者注意力转瞬即逝，品牌与电竞IP（知识产权）合作可以帮助自身树立年轻、富有活力的形象，但此举不太可能成为销售驱动力。”

— 益振嵘，品类总监

August 2021

Esports - China

数码趋势——二季度 - China

“Mintel is confident about the long-term prospect of the esports industry despite the growth slowdown in the number of pan-esports participants in 2021. The esports industry will further diverge in participants’ needs as the industry develops and matures. Professional services are increasingly important in order to serve hardcore fans’ needs ...

“新冠疫情为可穿戴数码产品、智能音箱和智能家居配件等其他数码产品提供了机会。多种形式和时长的视频内容已成为当下消费者娱乐休闲、网购、获取知识技能和旅游灵感等信息的重要来源。消费者生活加速数字化，也转变了他们与虚拟娱乐、产品和服务互动的方式。作为数码原住民的中国Z世代消费者是数码产品、视频内容和虚拟娱乐未来需求和发展的驱动力。Z世代消费者享受兴趣社区带来的亲密关系，品牌正可以从关注他们的对话并参与到Z世代的身分认同探索之旅。”

— 颜慧诗，研究分析师

July 2021

Digital Trends - Q2 - China

“The COVID-19 outbreak has presented opportunities in other devices, such as wearables, smart speakers, and smart household accessories. Video-based content in various formats and duration are now important resources for consumers’ leisure and entertainment, eCommerce, skills and knowledge, travel inspiration, and more. Accelerated digitisation in consumers’ lives has led to ...

可穿戴设备 - China

“可穿戴设备市场总体将继续增长。功能上，可穿戴设备的主要功能即将从活动追踪转向医疗监测和整体健康的提升。除了与健康行业保持紧密联系，可穿戴设备行业的企业还在探索细分化的用户需求，如针对儿童和年长者推出产品。随着现有的设备越来越多被作为时尚配饰，新兴品类也在崛起。智能眼镜或将为下一个蓝海市场。”

— 张鹏俊，研究分析师

June 2021

Wearable Devices - China

“The market as a whole continues to grow. In terms of functions, wearable devices are about to shift from being primarily used for activity tracking to medical monitoring and improving overall health. Besides sticking closely to the health sector, industry players are also exploring segmented users’ needs, such as targeting ...

May 2021

数码趋势 — 一季度 - China

“互联网普及率增长，尤其是农村地区的互联网普及率快速攀升，加速中国数字化进程。随着网购、短视频、电商直播和游戏等众多消费趋势继续普及，消费者更加依赖社交媒体活动。随着互联网流量红利消退，大型互联网企业和制造业公司将继续打造自己的生态系统，以留住消费者。智能手机影像主导了相机品牌的原有市场。相机品牌需要利用基于场景的功能在非必需品市场环境下寻求增长，并追上视频化和社交化等最新消费趋势。”

— 张鹏俊，研究分析师

Digital Trends - Q1 - China

“Digitalization in China has accelerated with the rapid development of internet penetration, especially in rural areas. Consumers rely more on social media activities, as many consumer trends continue to expand, such as online shopping, short videos, live streaming commerce, and gaming. Big internet and manufacturing companies continue to build up ...

Z世代科技产品使用习惯 - China

“Z世代决定了使用科技服务进行营销的方式。他们的科技产品使用习惯正在从游戏转变到更多不依靠交互就能进行的娱乐活动。他们对于科技服务的看法也受到大事件和大环境的影响，即新冠疫情以及与财务和身心健康带来的日益沉重的社会压力。能够提供娱乐性和价值驱动的产品或服务的品牌将会受到这群消费者的追捧。”

— 许昕远，研究分析师

April 2021

健康科技 - China

“随着消费者面临着新的健康问题、老龄化问题，并且心理压力加剧，健康科技正获得越来越多的关注。中年人专注于健康风险管理，年轻人则寻求健康科技中的游戏化内容。健康科技未来的商机在于多方面：提供以消费者为本的实用功能、迎合消费者对数据简化重新燃起的兴趣、并通过更好看的外观设计及功能加强产品的潮流性，从而帮助他们全方位改善健康。”

— 刘文诗，研究分析师

本报告分析以下问题：

March 2021

Health Tech - China

“Health technology is gaining traction as consumers encounter new health concerns, aging problems, and heightened emotional stressors. Middle-aged people are focusing on managing health risks while young people are looking for gamified features in health technology. Health technology’s future opportunities lie in delivering tools with consumer-centric practical functions, meeting the ...

Technology Habits of Gen Z - China

“Gen Zers are defining how marketers utilize technology services. Their technology habits are shifting from games to more hands-free entertainment-based activities. Their views on technology services have also been influenced by wider events and circumstances, namely COVID-19 and rising social pressure related to finances and health and wellbeing. Brands offering ...