

March 2021

全渠道零售 - China

“全渠道零售逐渐提升中国消费者的购物旅途与体验，消费者能通过这种方式在网上与线下平台中发掘最新产品与最佳优惠。受益于科技与社会经济的发展，市场上将涌现许多方式前卫的创新零售形式。然而，全渠道零售商近期内应着重发展以消费者为核心的购物体验。鉴于全渠道零售利用诸多触点收集数据，零售商从而能更好地为其顾客服务，在多渠道间打造连贯一致的顾客体验将会是一项持续存在的挑战。科技将得以适当应用，来提升消费者的购物体验，而不是边缘化那些不太玩转科技的顾客。全渠道零售未来将蓬勃发展，因此商家必须确保其服务对于每个人都便于使用、直观且具有包容性。”

— 颜慧诗，研究分析师

February 2021

购物中心 - China

“电商是购物中心最大的威胁，而且新冠疫情爆发之后，因为消费者担心感染新冠病毒，使得电商的威胁更甚。幸运的是，居家管控期结束之后，消费者前往购物中心的情况似乎已回归常态。但是，消费者要求越来越高。购物中心的作用是成为一个以社区为导向的场所，具有多功能的设施和服务，能够满足未来的社交和家庭需求。需求端消费力提升、生活方式升级，以及供应端的新零售形式和科技，将有助于达成以上目标。”

— 彭袁君，研究分析师

小家电 - China

“小家电将是整个家电行业未来的增长引擎，也是品牌关注的焦点。随着消费者对健康和美好生活的追求不断提升，具备新功能、新技术、新设计的创新小家电将更加受到市场的青睐。虽然消费者主要通过线上渠道购买小家电，但实体店仍然是他们挑选产品的重要渠道，也为他们提供更完善的购物体验。此外，智能化是小家电发展的必然趋势，品牌可以加大对渠道和智能家居生态系统的投入以吸引消费者。”

— 施洋，研究分析师

January 2021

IP and Licensed Merchandise - China

IP和授权产品 - China

“随着消费者个人认同感的不断提高，IP的概念越来越广泛，并已经成为社会中凸显个人特点的重要形象元素。与IP相关的授权产品也相应地迎来了更广阔的市场机遇。中国本土IP也不断涌现，在满足消费者追随本土文化的过程中，也对国内IP的运营提出了更大的挑战。”

— 益振嵘，品类总监

Omnichannel Retailing - China

Retail - China

"With the continuous improvement of consumers' personal identity, the concept of IP has become broader and has become an important image element that highlights personal characteristics in the society. Licensed products related to IP have correspondingly ushered in broader market opportunities. Local IP in China is also constantly emerging, which ...

"Omnichannel retailing enhances Chinese consumers' shopping journey and experience, allowing them to navigate online and offline platforms to find the latest products and the best deals. Driven by technological and socioeconomic developments, many innovative retail formats with futuristic applications will emerge. However, in the near term, omnichannel retailers should focus ...

Shopping Malls - China

"E-commerce poses the biggest threat to shopping malls and the outbreak of COVID-19 has exacerbated the situation since consumers now worry about infection. Fortunately, consumers' shopping mall visits seem to have returned to normal after the home quarantine period. But consumers' requests have become more demanding. The role of shopping ...

December 2020

Small Home Appliances - China

"Small home appliance is the future growth engine and brands' focus for entire home appliances industry. With the emerging pursuit on health and lifestyle by consumers, the innovative small home appliances with new function, technology and designs would be more popular in the market. Although the online channel is dominating ...

November 2020

大家电 - China

"面对新冠疫情对整个行业的冲击，品牌和零售商应保持乐观。消费升级现有家电的意愿更强烈，加速了行业向整体智能家居生态系统发展的步伐。在较低线级城市，消费者追求更多功能和更优设计，对产品升级的需求与日俱增，折射出较低线级城市的巨大市场潜力。中国大家电市场竞争激烈，智能家居和多功能性正在驱动市场的高端化进程。”

— 施洋，研究分析师

October 2020

Large Home Appliances - China

生鲜零售 - China

“Brands and retailers should stay positive about COVID-19’s effect on overall industry sales. Consumers’ increased willingness to upgrade their home appliances is expediting the industry’s development towards building more holistic smart home ecosystems. There is potential for lower tier markets with the growing demand for product upgrades with more functions ...

“每个家庭的支出将持续增长，从而推动生鲜零售行业的健康发展。作为不断发展的行业，线上零售商必需为消费者提供便利性之外的价值。年轻群体是实用主义者，他们利用线上和线下渠道货比三家寻找最划算的产品，这使资金雄厚的全渠道零售商在不久的将来占据优势。”

— 施洋，研究分析师

社交电商 - China

“过去几年，社交媒体发展迅速。越来越多社交媒体加入社交电商行列，将视频直播和购物功能直接融入自身平台，使消费者可以在平台内完成一站式购物，而不需要跳转至传统电商平台新冠疫情的爆发和直播的热潮大大提高了消费者对社交电商的关注度。但消费者仍旧难以把“良好的质量、配送、售后服务”等特征与拼多多和微信微商此类的社交电商联系起来。社交电商可更好地利用上述特征与传统电商产业的竞争对手一争高下，夯实它们在赢得消费者青睐方面的领头羊地位。”

— 夏月，研究分析师

September 2020

Fresh Grocery Retailing - China

“Spending per family will keep increasing, leading to a healthy growth rate for fresh grocery retailing industry. Online retailers, as the growing sector, will have to provide values that are more than just convenience for consumers. Younger demographics are pragmatist utilizing both online and offline channels to get the best ...

Social Commerce - China

“Social commerce has evolved quickly during the past few years. Increasingly more social media platforms have jumped on the bandwagon officially by incorporating the livestreaming and shopping function directly into the platform so that consumers don’t have to be redirected to e-commerce platforms to make the final purchase. The outbreak ...

August 2020

母婴产品零售 (含新冠疫情分析) - China

“未来几年，据预测新生儿数量将会减少，母婴产品零售市场整体增长将主要依赖人均支出增长。线上综合性购物网站对母婴产品零售更重要，消费者更加依赖于此。线上母婴论坛是可信的育儿信息来源，尽管它们仍面临将内容商业化的挑战。品牌和零售商可利用母婴相关服务瞄准更年轻的消费者，强化品牌资产和购物体验。”

— 施洋，研究分析师，2020年5月30日

Mother and Baby Products Retailing (Incl Impact of COVID-19) - China

“Given the expected drop in the number of new-born children in the next few years, the overall future growth of the mother and baby products retailing market will mostly come from increasing spending per baby. Online comprehensive shopping websites have become more important for mother and baby products sales and ...

July 2020

新冠疫情后的汽车零售市场 - China

“由于汽车零售行业严重依赖线下经销商模式，新冠疫情导致线下汽车经销商和贸易市场被迫关门，造成销量中断。新冠疫情的影响使汽车品牌和消费者更加意识到线上零售的必要性和潜力。

消费者对将部分购车流程转移到线上表现出强烈兴趣，尤其是因为线上的车价和售后服务价格往往更加透明。消费者在线上还可享有具有安心交车服务的个性化购买过程，这也可能成为另一个动因。

值得注意的是，线下汽车经销商仍将是消费者咨询价格或试驾的主要初始渠道，并且许多消费者对传统面对面的关系建立了信任。因此，销售人员的专业性是线下经销商应加强的核心竞争力，以提供准确的信息并使购买过程个性化。”

— 周同，高级研究分析师，2020年5月31日

March 2020

美容零售 - China

“实体店不再仅仅是售卖产品的场所，而且是为消费者创造体验的地方，其重点不仅仅在于以具有竞争力的价格出售产品，与线上渠道竞争，而且应转向打造具有记忆点的体验，提供专业建议，最重要的是为消费者设计接触新品的氛围，打造舒适的产品试用环境。”

Changing Landscape of Car Retailing after COVID-19 - China

“The shut-down of offline car dealers and trade markets put a temporary pause on the car retailing industry during the lockdown period of COVID-19, since car retailing is an industry that heavily relies on the trade dealership model. The impact of COVID-19 has made both car brands and consumers more ...

快闪店 - China

“快闪店心系消费者对其的高度预期，致使其他零售业态采纳更多快闪元素，这种现在将在零售业更加普遍。消费者追求新鲜感以及与品牌的情感联系，这推动零售市场成为故事讲述者，而不仅仅是零售商。SKP-S的诞生充满酷炫、多元化的信息呈现。相对售卖商品来说，它追求与消费者进行深层联系。这种吸引眼球、动人心弦的风格注定会吸引志趣相投的消费者，打造独一无二的品牌形象。

— 施洋，研究分析师

February 2020

Beauty Retailing - China

“Bricks-and-mortar stores are no longer just a place to sell products but also a destination to create experiences for consumers, the focus should not only be selling products with price competition with online channels, but shift to create memorable experiences, to provide expert advice and the most importantly is to ...

Pop-up Stores - China

“With consumers' high expectations of pop-up stores in mind, pop-up stores will become more pervasive in the retail world by compelling other retail formats to have more pop-up elements. Consumers' pursuit of novelty and connecting with brands emotionally has pushed the retail market to become storytellers than mere capitalists. The ...