

Convenience Stores – China – 2023

Report Price: £3695 | \$4995 | €4400

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This report looks at the following areas:

- Shopping frequency and comparison between before and after COVID-19.
- Reasons and Interests and breakdown analysis of shopping behaviour.
- Purchase categories and timing including online purchase on-demand.
- Brand image and perception of important shopping drivers.
- Attitudes towards membership and consumer concerns.
- Preferable additional services and opportunities for business expansion.

By 2022, the number of convenience stores came to around 91,000, more than double the 41,000 in 2017. Following rapid growth, China's convenience store market expects to continue to grow steadily. Small and decentralised community-based types of retailing were well placed to meet consumer needs during and in the post-COVID era. The Government's community development policy has also contributed to market growth. The new online-merged with-offline business model and improving operational capacity will further expand the possibilities available to convenience stores.

Convenience stores have gradually taken on some of the functions of 'community service centres', which has led them to explore new and different business models that incorporate more services. Consumers are also becoming accustomed to the convenience services that convenience stores offer beyond retail, such as courier collection and providing rest areas. More than 60% of shoppers express interest in eating or taking rests in a convenience store if seats are available. However, as the pace of life accelerates, consumers' demand for convenience continues to rise, requiring convenience store chains to explore more 'convenience store+' business models to meet consumer demand.

At the same time, with the change in consumer mindset and the popularity of online instant retail, consumers' requirements for convenience stores are also changing. They want convenience store shopping to bring pleasure to their busy daily lives, even at the expense of some convenience. This also places a



"Convenience stores are one of the few offline channels that performed well even in the pandemic period. Store numbers have more than doubled in the last five years, especially in lower tier cities. Gaps between major domestic and Japanese brands are narrowing down."
– Frank Zhang, Senior Analyst

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higher demand on the internal environment and service standard. Convenience shops should also differentiate themselves by creating their own brand identity, giving consumers more reasons to choose them. In this regard, attractive convenience store membership programmes can be effective in increasing consumer stickiness, but consideration needs to be given to how to allay consumer concerns and reduce the burden of usage when designing membership systems.



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