

September 2023

超市 - China

“地理位置方便、能够实地查看商品是吸引消费者前往超市购物的首要原因。将郊区大卖场转型为靠近居民区的中小型超市，将是超市生存下去的可行策略。长远来看，超市需要通过差异化的产品种类和更好的店内购物体验来打造自己的特色，从而实现增长。”

— 邵娟，品类总监

August 2023

消费意愿 —— 上半年 - China

“疫情防控措施放开后，中国经济发展正在恢复，但仍面临压力和挑战。消费者的财务状况保持稳定，且消费信心也有所上涨。谨慎的消费心态仍将在2023年继续。报复性消费将集中于能够以小额支出收获即时快乐的领域，如旅游、线下休闲活动以及餐饮品类。”

—— 张鹏俊，高级研究分析师

July 2023

Consumer Spending Sentiment - 1H - China

“China's economic development is recovering after the relaxation of COVID-19, but is still facing pressure and challenges. Consumers' financial situation remained stable, and consumer confidence also picked up. The cautious consumption mentality will still be maintained in 2023. Revenge spending will be concentrated in sectors that can bring instant happiness ...

便利店 - China

“便利店是即使在疫情期间也表现良好的少数线下渠道之一。过去5年里，便利店数量增加了一倍以上，尤其是在低线城市。主要的国内品牌以及日系便利店品牌之间的差距正在缩小。除了差异化选品以外，自有品牌和会员策略在实现差异化和提高客户忠诚度方面也发挥着重要作用。在大多数中国消费者的认知中，便利店不再局限于应急购物，它们也能提供实用的社区服务以及有趣的购物体验。增加本土特色和IP（知识产权）联名也有助于通过店内互动和社交媒体宣传提高品牌知名度。”

— 张泽龙，高级研究分析师

June 2023

Convenience Stores - China

“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.

Besides unique products, private labels and membership ...

April 2023

私域流量：D2C零售 - China

"尽管人们对私域零售的潜力充满热情，但其增长尚未达到预期。后疫情时代，品牌需要重新思考它们的私域渠道策略。在线上和线下渠道提供优质的内容和体验以传递品牌价值理念，应该成为品牌通过私域渠道增强消费者忠诚度的优先策略。同时，品牌可以专注于在私域渠道上发展有潜力成为重复购买者、创新者或KOL（关键意见领袖）的‘高价值’消费者，以进一步利用其私域流量。"

Live Streaming Commerce - China

"Live streaming shopping no longer just means low prices for consumers. Future opportunity lies in generating higher-quality content. This requires brands to develop a live streaming strategy that considers both sales and brand influence. Meanwhile, it illustrates that live streaming commerce has entered the second stage of competition – one ...

直播带货 - China

"网络直播购物对消费者不再仅仅意味着获得低价；未来的机遇在于打造更优质的内容。这需要品牌制定兼顾销量和品牌影响力的直播策略。与此同时，这也说明直播带货已经进入第二竞争阶段，即整合内容创作能力与电商运营效率的阶段。"

——张鹏俊，高级研究分析师

March 2023

Private Traffic: Direct-to-Consumer Retailing - China

"Despite the enthusiasm surrounding the potential of direct-to-consumer retailing, it has not seen anticipated growth. Brands need to reconsider their strategies on DTC channels in the post-epidemic era. Delivering brand values and philosophies through high-quality branded content and experience online and offline should be a priority for enhancing consumers' loyalty ...

美容零售 - China

"尽管2022年出现了严峻挑战，但是在疫情防控政策放宽的情况下，消费者有望购买更多美容及个人护理产品且恢复实体店购物。随着消费者减少冲动消费，并且更多受品质和体验所驱动，线上和线下渠道有必要采用多种策略，并提供高品质体验吸引消费者，为其提供合理的购买理由。品牌也需在不同触点上展现更大的诚意，以便与消费者建立起健康长久的关系。"

——古丹阳，高级研究分析师

February 2023

Beauty Retailing - China

"Despite tough challenges in 2022, the lifting of the COVID-19 prevention and control policies will see consumers purchasing more BPC products and returning to physical stores. With spending sentiment becoming less impulsive and more driven by quality and



Retail: Overview - China

experience, it will be important for both online and offline channels to ...

Upcoming Reports

**Consumer Spending Sentiment -
2H - China - 2023**

Social Media Retail - China - 2023

社交媒体零售 - 中国 - 2023年

**Trends of Online Retailing - China
- 2023**

Shopping Malls - China - 2023

消费意愿 —— 下半年 - 中国 - 2023年

购物中心 - 中国 - 2023年

线上零售趋势 - 中国 - 2023年