

## March 2023

## 体验式零售 - China

“尽管取消了疫情管控措施，但是品牌和零售商仍面临挑战——整体低迷的经济形势、更为审慎的消费态度，以及后疫情时代持续变化的线下购物方式。确保消费者在线下购物的安全和舒适（如干净卫生的环境、不那么拥挤）对品牌和零售商至关重要。此外，品牌和零售商应专注于提供沉浸式和趣味性的购物场景（如主题场景），让消费者不受过多干扰地自主探索，只在其需要的时候及时提供帮助。”

——姚媛妍，研究分析师

## February 2023

## 母婴零售 - China

“低生育率将持续对中国的母婴产品市场构成挑战。不过，由于年轻一代的家长寻求高品质的产品以保障孩子以及自身的身心健康，品牌可借由产品创新和高端化发掘增长机遇。同时，母婴产品消费者非常成熟且精明，他们的消费是谨慎并经过深思熟虑的。因此，品牌/零售商需利用多个触点，更明智地与消费者沟通和互动。”

## January 2023

## Experiential Retailing - China

“Brands and retailers are still facing challenges despite pandemic control measures being removed, including the overall sluggish economy, consumers' spending becoming more intentional and their changing behaviours when shopping offline in the post-epidemic times. Ensuring safety and comfort for consumers in offline stores (eg sanitary environment, less crowded) becomes essential ...

Mother and Baby Products  
Retailing - China

“Low fertility rates will continue to pose a challenge to China's mother and baby product market. However, brands are presented with growth opportunities through product innovation and premiumisation as the young generation parents are seeking quality products to ensure the wellbeing of both their children and themselves. In the meantime ...

## 线上零售趋势 - China

## 生鲜零售 - China

“自2022年初新冠疫情反弹以来，随着消费者对高品质产品的升级需求，生鲜零售市场加速增长。多元化渠道偏好虽然加剧了市场竞争，但为奥特莱斯店等满足消费者细分需求的新商业模式提供了机遇。鉴于消费者对品质和价格的关注，自有品牌产品不仅具有增长潜力，还有助于生鲜零售商持续吸引消费者。”

## Fresh Grocery Retailing - China

“The fresh grocery retailing market witnessed accelerated growth amid the resurgence of COVID-19 since early 2022 and upgraded demand for quality offerings. Diversified channel preference, though intensifying market competition, presents opportunities to new business models such as outlet stores which cater to consumers' segmented needs. Private label products not only ...

“近5年，线上零售额虽然一直保持正向增长，但增速明显放缓。若要在激烈的竞争中脱颖而出，网上购物平台和品牌应专注为消费者提供高品质的产品和服务，这也是影响消费者网上购买决策最关键的因素。此外，网购可以被重塑为一种现代生活方式，品牌/平台可以采取更多新颖的营销手段（如添加有趣的元素和提供松弛感），帮助消费者更好地享受网上购物。”

— 姚滨妍，研究分析师

## December 2022

### Trends of Online Retailing - China

“Sales value of online retailing has maintained positive growth in the past five years, but the growth has slowed down considerably. To stand out in fierce competition, online shopping platforms and brands should continue focusing on delivering high-quality products and services to consumers, as these are the most critical aspects ...

## September 2022

### 消费意愿——上半年 - China

“2022年3月大规模新冠疫情反弹打乱了中国经济的稳步复苏。虽然经济发展面临严峻挑战，但消费者财务状况和长期信心仍保持稳定。尽管目前经济指标已在6月基本回正，但下半年经济复苏仍充满不确定性。”

— 张鹏俊，研究分析师

## August 2022

### Consumer Spending Sentiment - 1H - China

“The steady recovery of China's economy was disrupted by the large-scale COVID-19 resurgence in March 2022. Although economic development has been severely challenged, consumers' financial situation and long-term confidence remain stable. Although the current economic indicators have basically returned to positive in June, the economic recovery in the second half ...

## June 2022

### 零售趋势：国潮 - China

“国潮是动态发展的趋势，传统文化是其核心价值。品牌有必要通过数字化以及与流行文化融合等形式/内容创新，展现其紧跟潮流的精神。传统文化元素是国潮的核心价值，也是消费者购买国潮产品最重要的驱动力。消费者不仅期待老字号得到重振，也希望看到国际品牌进行更多本土化尝试。”

——张鹏俊，研究分析师

## May 2022

### Evolving Retailing Trends: Guochao - China

"Guochao is a trend of dynamic development, with traditional culture as its core value. It is necessary for brands to demonstrate their on-trend spirit through form/content innovation, such as digitalisation and fusion of popular culture. Traditional cultural elements are the core value of Guochao, and they are also the ...

### 线上购物节 - China

“作为年度重要的促销活动，线上购物节已步入较为缓慢的发展阶段，消费者的投诉声浪也不断增加。尽管如此，它们依然具有吸引力，消费者在购物节的花费也持续上升。为了推动线上购物节的长期增长，品牌和平台应提供简单直接的折扣和更具吸引力的体验，让消费者乐在其中。同时，品牌应将购物节作为与消费者互动和提升品牌忠诚度的重要契机，而不仅是简单的促销活动。”

——姚镔妍，研究分析师

报告关键议题

### Online Shopping Festivals - China

“Online shopping festivals, as major promotional events during the year, have entered a stage of slower development, and there have been increasing complaints from consumers. Despite that, they remain appealing to consumers and spending during these festivals continues to increase. To drive long-term growth in online shopping festivals, brands and ...

## April 2022

### 私域流量：D2C零售 - China

“私域渠道大受关注是疫情后电商得到发展的直接结果。然而，品牌需要认识到，私域渠道并不是应对获客成本攀升导致的所有问题的法宝，领先的电商平台仍是网购消费者的首选之地。品牌需要意识到私域渠道带来的独特价值。知名品牌可以在私域渠道打造社群，以此将流量引导回旗舰店。新兴品牌或可利用私域渠道获取一手消费者数据，并致力于提供定制化服务，以满足小众需求。”

——张鹏俊，研究分析师

### March 2022

#### Private Traffic: Direct-to-consumer Retailing - China

“Private channels have received great attention as a direct result of ecommerce development in the wake of the outbreak. However, brands need to be aware that private channels are not the answer to all the problems associated with the rising costs of customer acquisition. Leading ecommerce platforms are still the ...

### February 2022

#### 美容零售 - China

“中国的零售格局持续发展，新玩家与新平台快速兴起。品牌需要有效地运营私域流量，为消费者提供个性化的产品推荐与实用的美容建议，并利用非美容类的信息满足消费者的情感需求，以此维持消费者兴趣并培育其品牌忠诚度。”

— 柴静彦，研究分析师

#### Beauty Retailing - China

“China’s retailing landscape continues to evolve, with new players and platforms emerging quickly. Brands need to operate private domain traffic in an effective way, providing personalised product recommendations and practical beauty tips, and leveraging non-beauty information to cater to consumers’ emotional needs, so as to retain consumer interest and cultivate ...