

# 中国消费者跨境消费 趋势洞察报告

## 新加坡篇(精简版)

Cross-Border Consumption Trends of Chinese Consumers  
Singapore Version (Condensed Version)

2018.04.12

# 目录 Agenda

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Cross-Border  
Consumption Overview

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Cross-Border  
Consumption Trends

## PART 03

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Singaporean Brands  
Consumption Insights

## PART 04

### 趋势展望

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Forecast

01

# 跨境消费市场概览

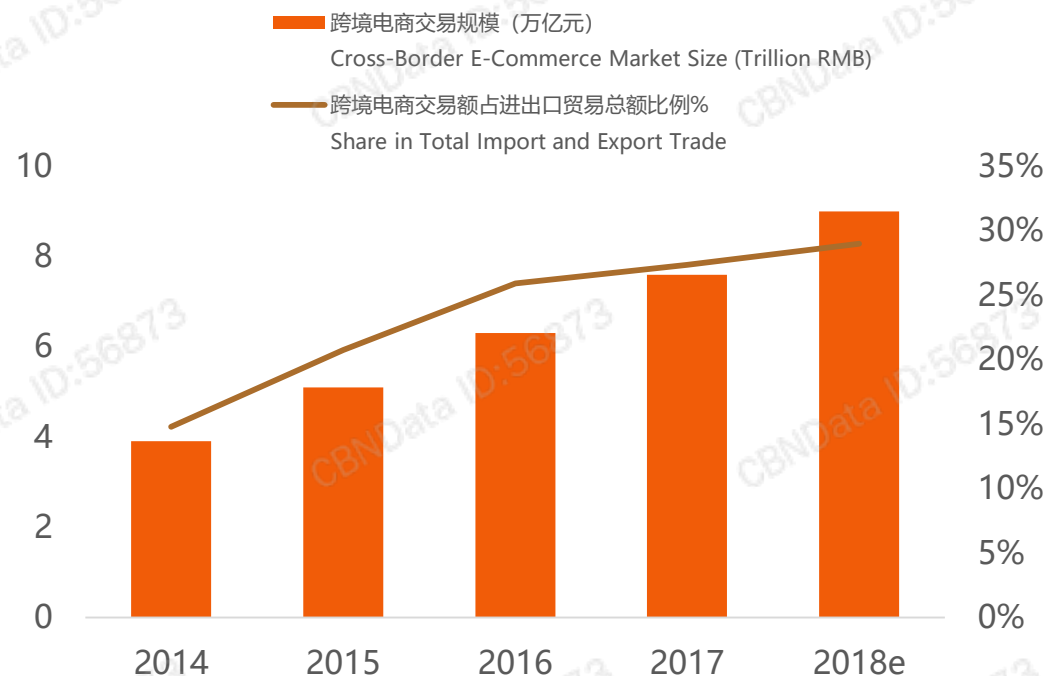
Cross-Border Consumption Overview

# 中国跨境电商交易规模稳定增长

Market Size of Chinese Cross-Border E-Commerce keeps growing

中国跨境电商交易规模以及占进出口贸易总额比例

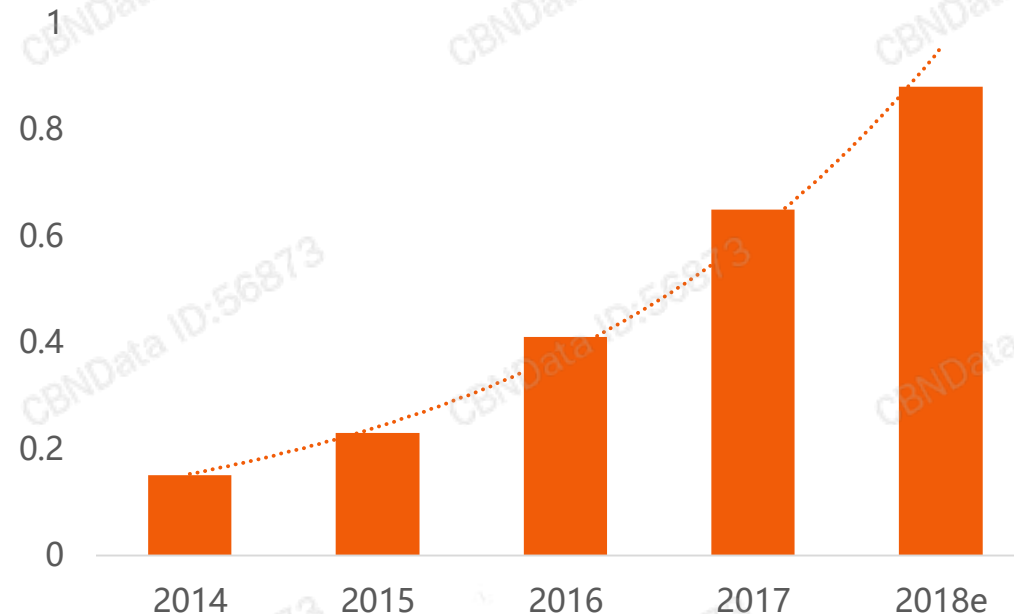
Chinese Cross-Border E-Commerce Market Size & Share in Total Import and Export Trade



数据来源：国家统计局 Source: State Statistical Bureau

海淘用户规模 (亿人)

Number of Cross-Border Consumers (Hundred Million)



数据来源：艾媒咨询 Source: iiMedia Research

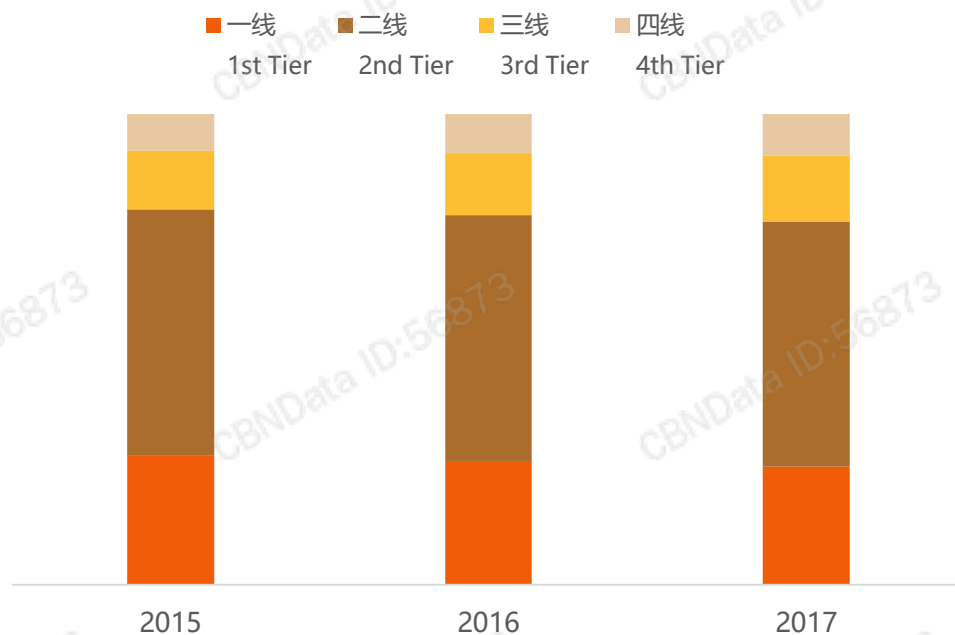


# 跨境消费普及化

Cross-Border Consumption Has Become More Prevalent

不同线城市消费者消费金额占比

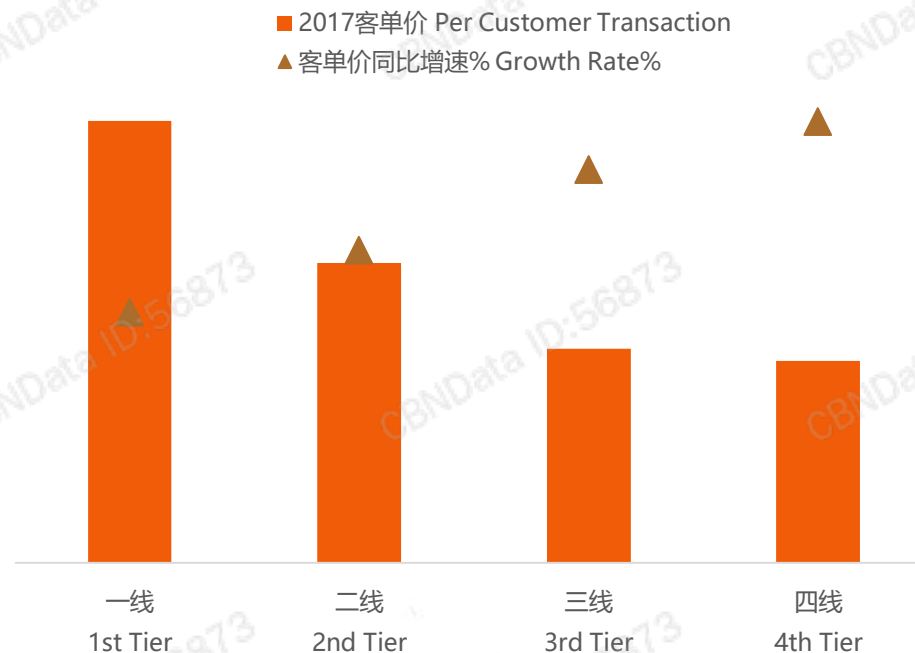
Cross-Border Consumption Distribution of Different City Tiers



数据来源：阿里数据 Source: Alibaba data

2017年不同线城市消费者客单价及同比增速

2017 Cross-Border Per Customer Transaction Amount & Growth Rate% By City Tiers



数据来源：阿里数据 Source: Alibaba data

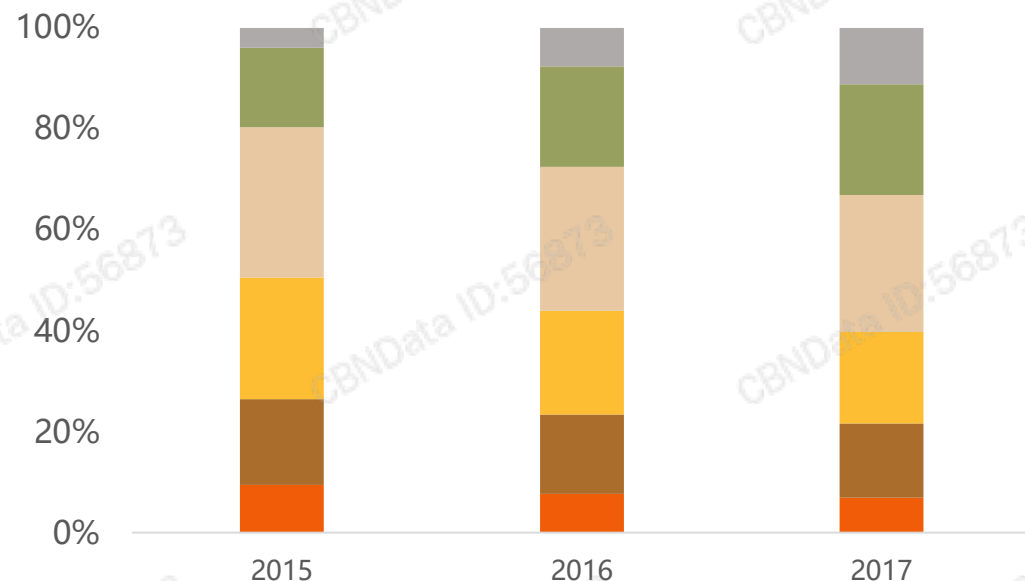
# 年轻用户成为跨境消费主力军

Young Consumers Become the Main Purchasing Power of Cross-Border Consumption

跨境消费金额年龄分布

Cross-Border Consumption Value Share by Age Group

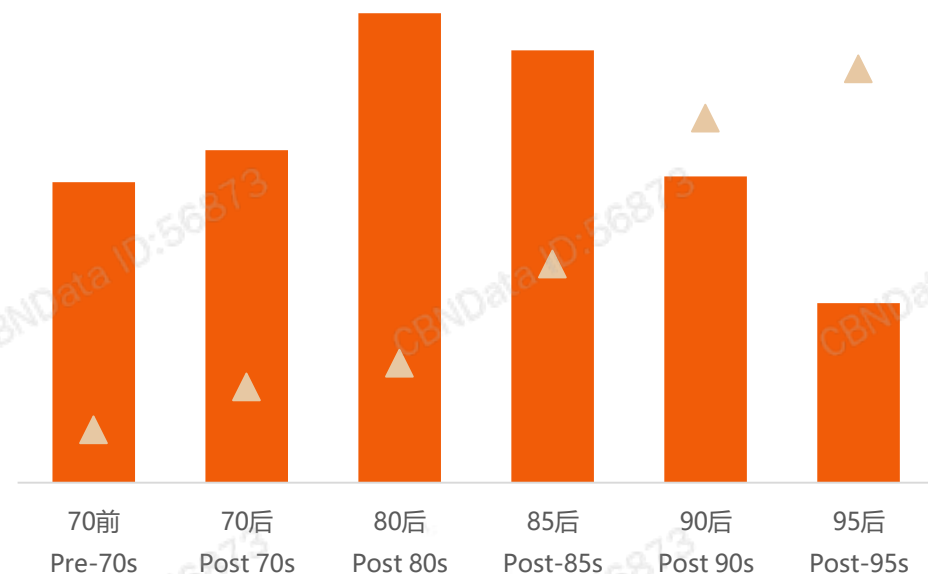
70前 70后 80后 85后 90后 95后  
Pre-70s Post 70s Post 80s Post-85s Post 90s Post-95s



2017年各年龄段消费者客单价及客单价同比增速

2017 Cross-Border Per Customer Transaction Amount & Growth Rate% By Age Groups

2017客单价 Per Customer Transaction 客单价同比增速% Growth Rate%



数据来源：阿里数据 Source: Alibaba data

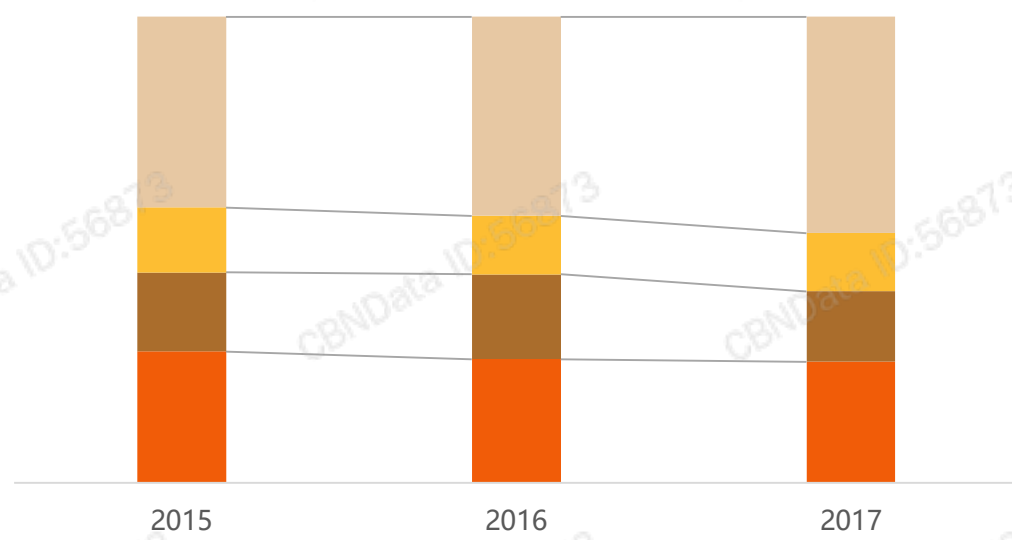
# 国别购买更加丰富

More Purchasing Choices in Product Countries

各原产地国商品消费金额占比

Sales Proportion by Product Origin Countries

■ 日本 Japan ■ 韩国 Korea ■ 美国 United States ■ 其他 Others

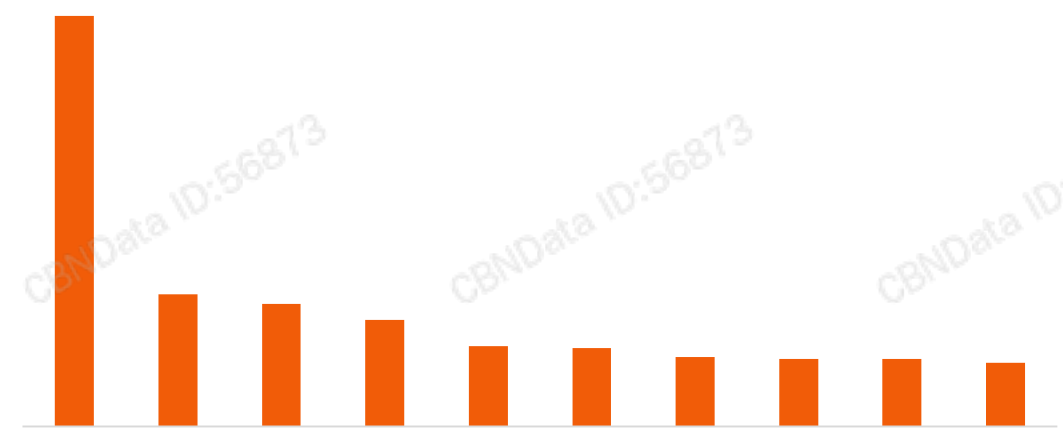


数据来源：阿里数据 Source: Alibaba data

2017年小众国家热度提升前十

2017 Top 10 Increasing "Popularity Index" Niche Countries

希腊 Greece 以色列 Israel 匈牙利 Hungary 西班牙 Spain 奥地利 Austria 波兰 Poland 比利时 Belgium 智利 Chile 泰国 Thailand 意大利 Italy



热度提升指数：2017年来自该国的商品跨境消费金额/2016年来自该国的商品跨境消费金额-1  
Increasing "Popularity Index" = 2017 sales of products / 2016 sales of products - 1

# 02

## 跨境消费趋势

### Trends in Cross-Border Consumption

#### 趋势一 跨境消费习惯更加成熟

Trend 1 Cross-Border Consumption Become More Mature

#### 趋势二 健康化成为常态

Trend 2 The Normalized Healthiness

#### 趋势三 更关注品质

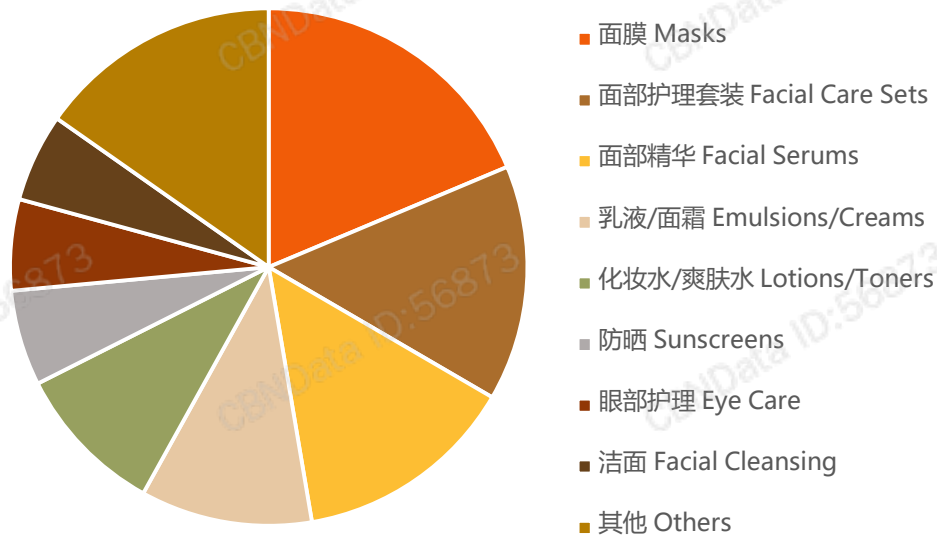
Trend 3 More Awareness Of Quality



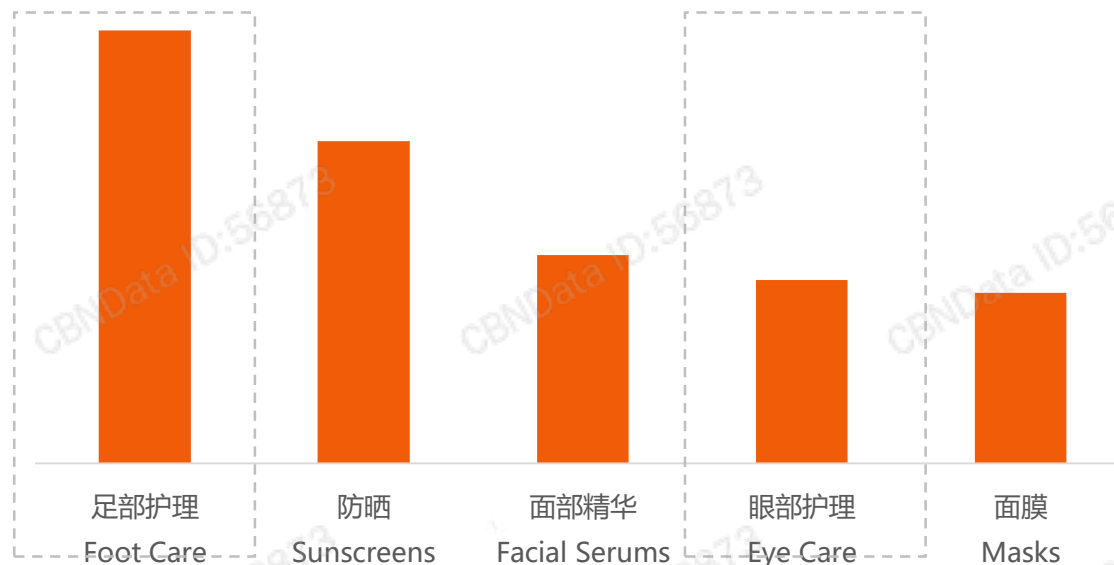
# 消费者除基础护肤品类外，会购买更多样的商品

Consumers Buy More Beauty Categories Besides Basic Skincare Products

2017年美容护肤跨境消费金额分布  
2017 Beauty Care Sales Proportion By Category



2017年美容护肤跨境消费金额同比增速前五品类  
2017 TOP 5 Fast Growing Beauty Care Categories



数据来源：阿里数据 Source: Alibaba data

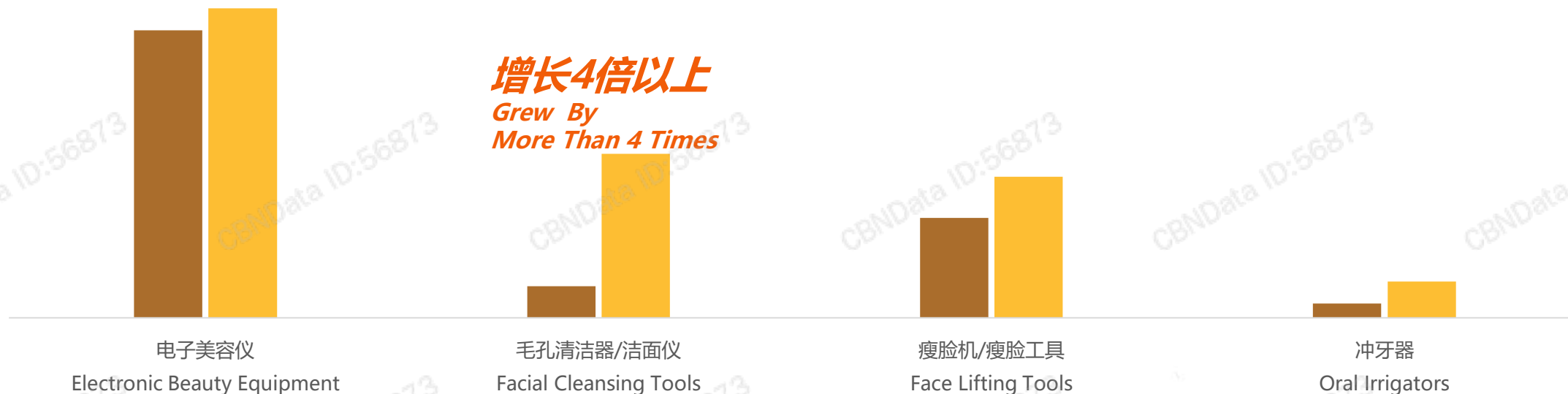
# 专业美容仪器畅销

## Professional Beauty Devices Sell Well

2016-2017年个人护理仪器跨境消费金额

2016-2017 Personal Care Device Sales Amount

■ 2016 ■ 2017

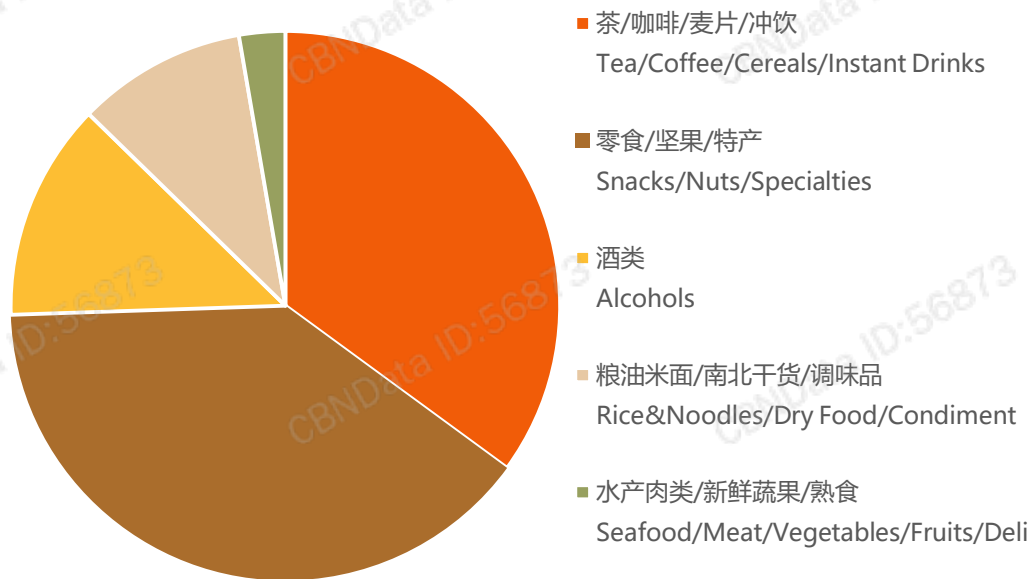


数据来源：阿里数据 Source: Alibaba data

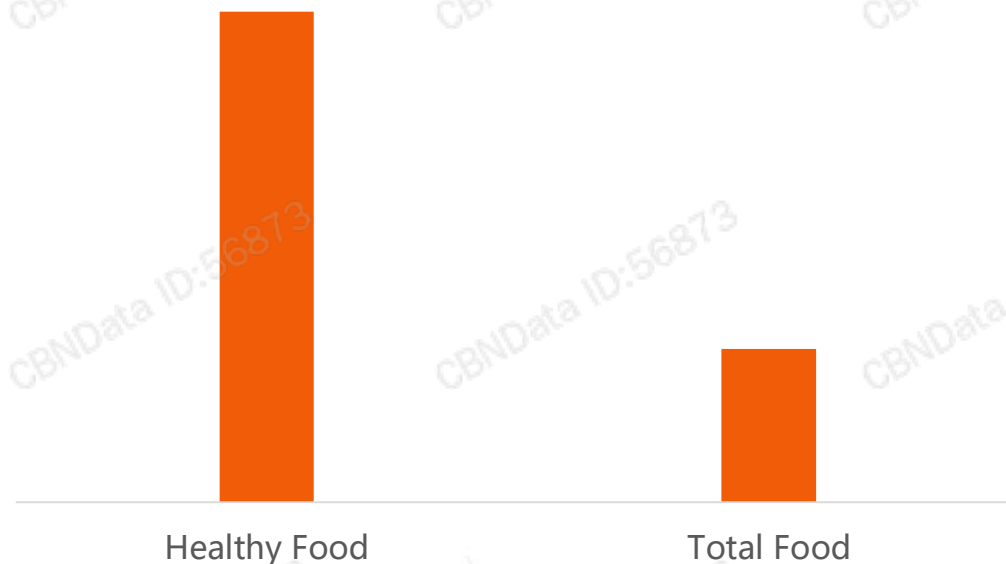
# 饮食更健康

## Healthier Food & Drinks

2017年跨境食品品类消费金额分布  
2017 Cross-border Sales Proportion In Food Category



2017年健康食品跨境消费金额同比增速 (%)  
2017 Healthy Food Sales Growth Rate



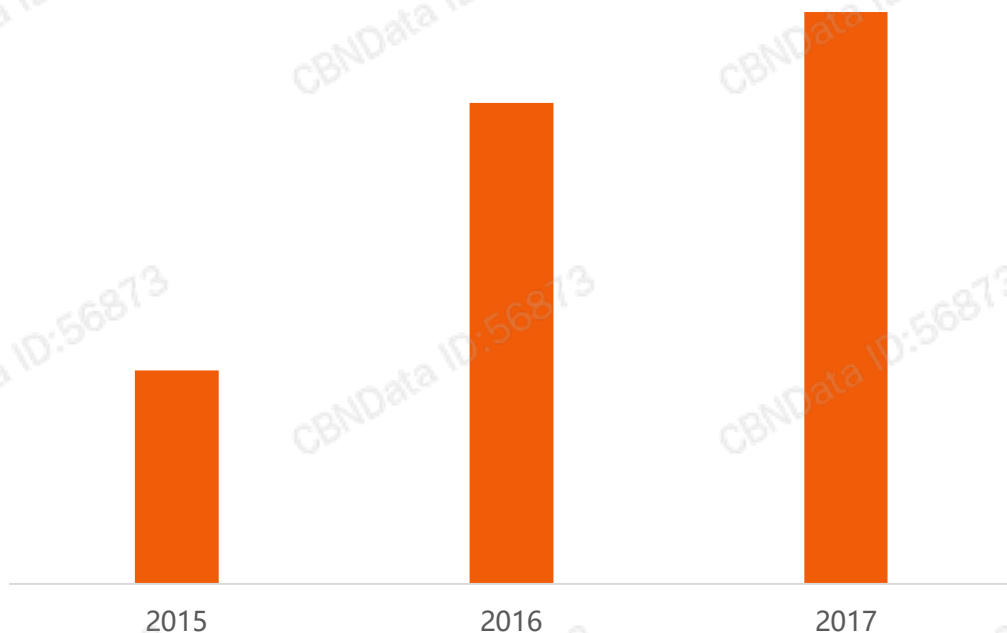
数据来源: 阿里数据 健康食品: 包含 有机|非转基因|原生态|低脂|无糖|无农药|农家|纯天然|无添加|非油炸|无公害|全麦 关键字的食品  
Source: Alibaba data Healthy food include organic, low fat, low sugar, no additive, whole grain

# 保健品消费成为常态

## Health Product Consumption Becomes Prevalent

2015-2017年保健品跨境消费客单价

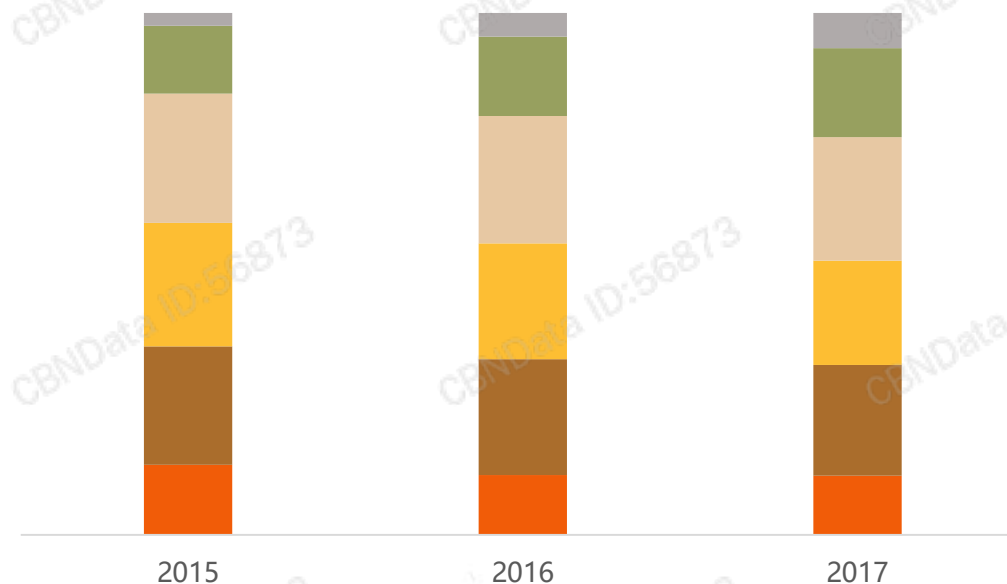
2015-2017 Health Supplements Per Customer Transaction



各年龄段消费者保健品跨境消费金额占比

Health Supplements Sales Proportion By Age Groups

70前 70后 80后 85后 90后 95后  
Pre-70s Post 70s Post 80s Post-85s Post 90s Post-95s



数据来源：阿里数据 Source: Alibaba data

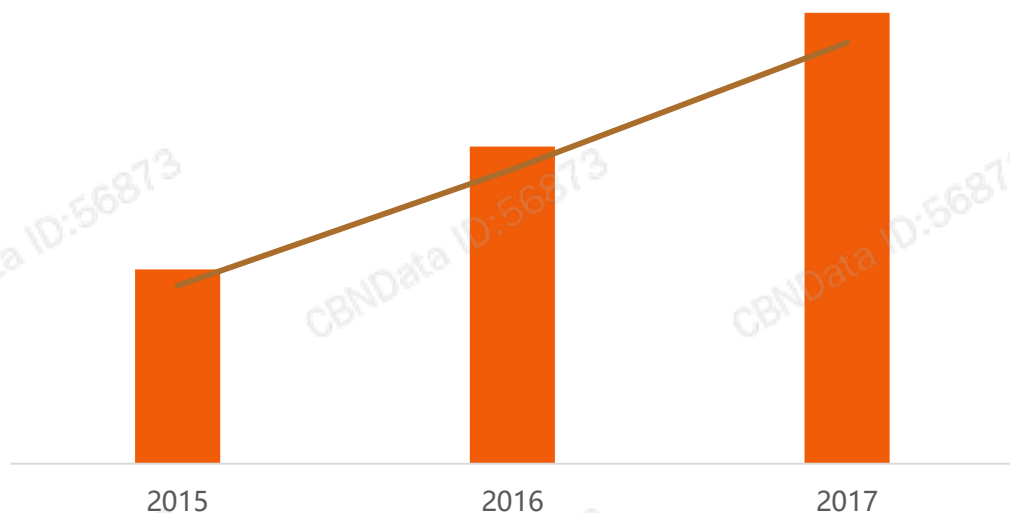
# 运动成为潮流

## Sports Become Trendy

运动品类跨境消费金额与购买人数

Sales Amount And Number Of Buyers Of Sports Category

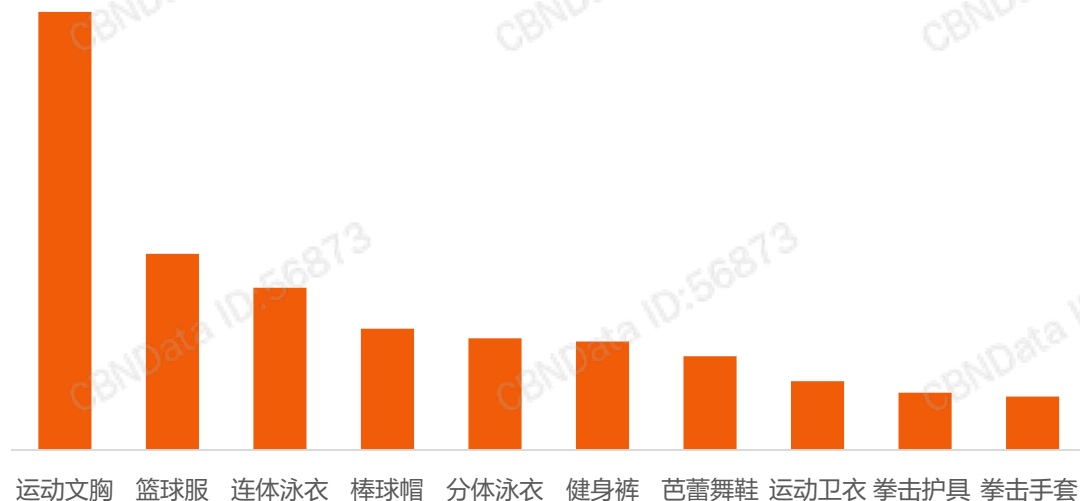
消费金额 sales amount 购买人数 number of buyers



运动相关品类包括：运动服，运动鞋，运动用品  
Sports Category Include: sports Clothes, Sports Shoes, Sports Goods

2017各运动品类跨境消费金额同比增速 (%)

2017sale Growth Rate% Of Different Sports Categories



数据来源：阿里数据 选取销售额占比0.1%以上的品类  
Source: alibaba Data Select Category With More Than 0.1% Sales Share

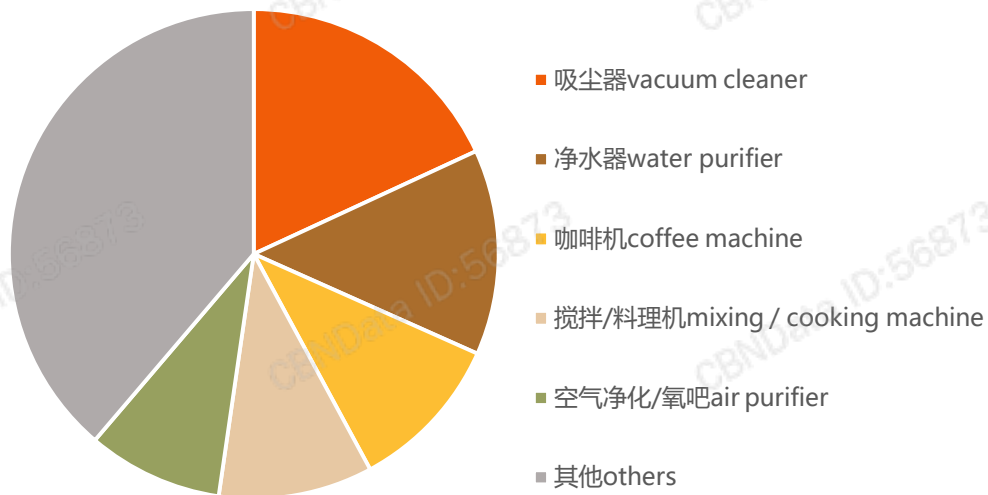


# 跨境家电购买更多样

The Purchase Of Cross-border Home Appliances Is More Diversified

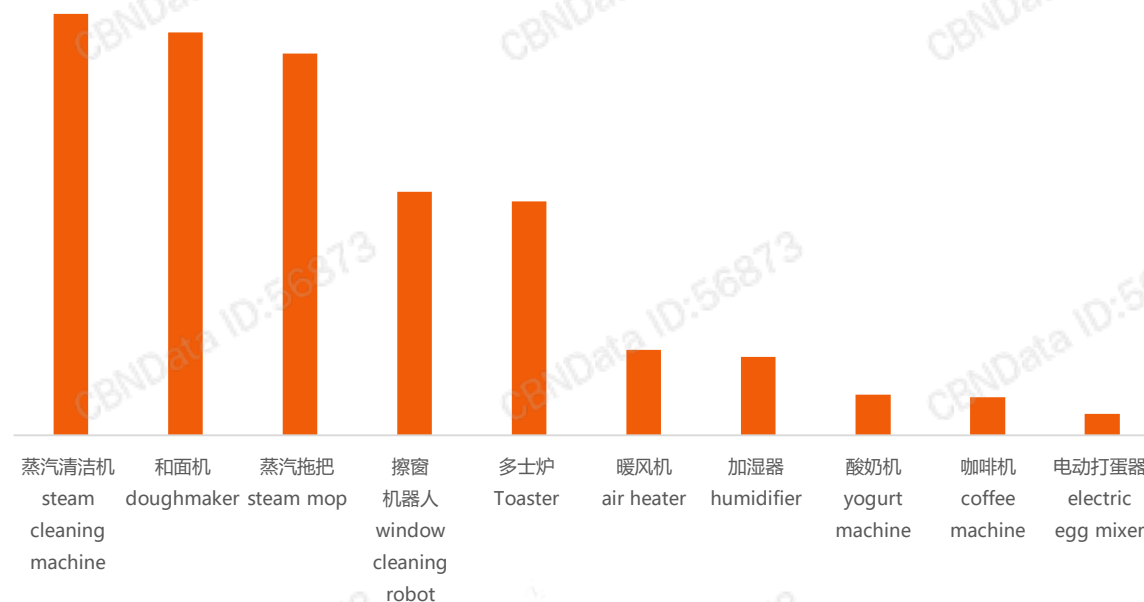
2017年跨境家电各品类消费金额分布

2017 sales Proportion Of Category In  
Cross-border Home Appliances



2017年消费金额同比增速排名前十的跨境家电品类

2017 Sales Growth Rate% Top 10 Of Cross-border Home Appliances



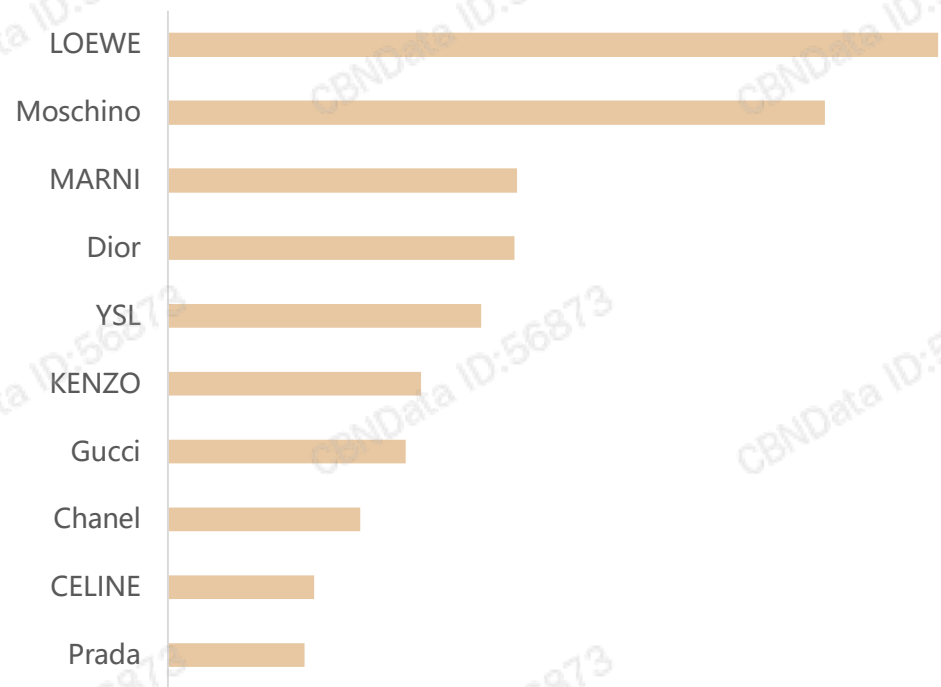
数据来源：阿里数据 Source: Alibaba data

# 小众及独立设计师品牌受追捧

Independent Designer Brands And Niche Brands Are More Popular

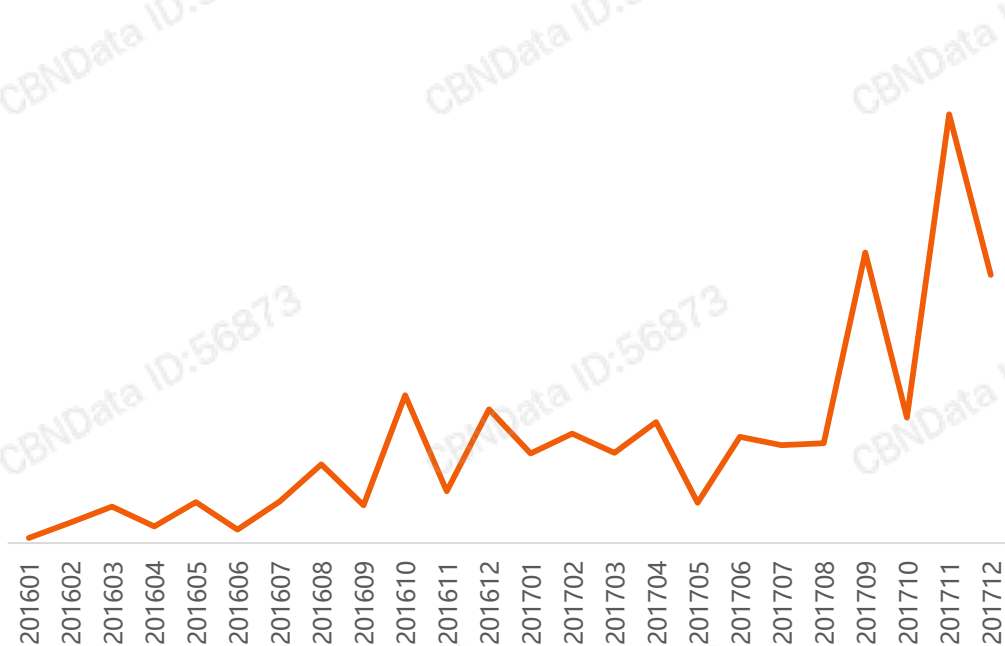
2017年奢侈品包袋跨境消费金额同比增速排名前10品牌

2017 Top 10 Highest Sales Growth Rate Of Luxury Bag Brands



以YSL为例 风琴包订单量趋势

YSL Sac De Jour Order Trend



数据来源：阿里数据 Source: Alibaba data

# 03

## 新加坡品牌消费洞察

### Singaporean Brands Consumption Insights

该部分基于中国跨境消费中新加坡品牌商品消费数据进行分析

This Part Is Based On Singaporean Brands Consumption Data In Chinese Cross-border Consumption

中国消费者跨境消费趋势洞察报告(新加坡篇)

Cross-Border Consumption Trends of Chinese Consumers (Singapore Version)



淘宝大学  
Taobao University

CBNData  
第一财经商业数据中心

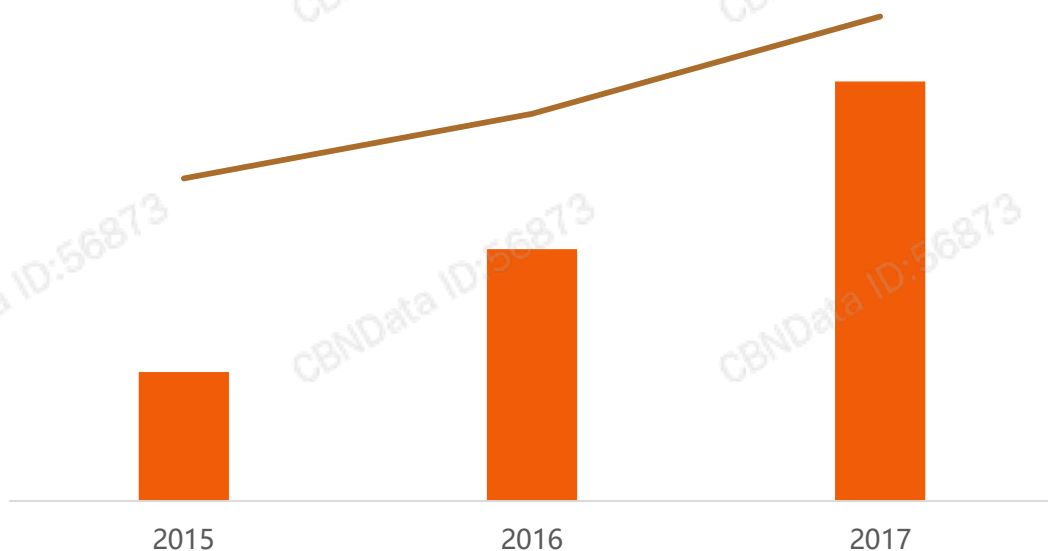
# 新加坡品牌在中国整体跨境消费中占比逐步提升

Share Of Singapore-brand Products Grew Gradually In Total Cross-border

新加坡品牌商品消费金额趋势以及在跨境消费中占比

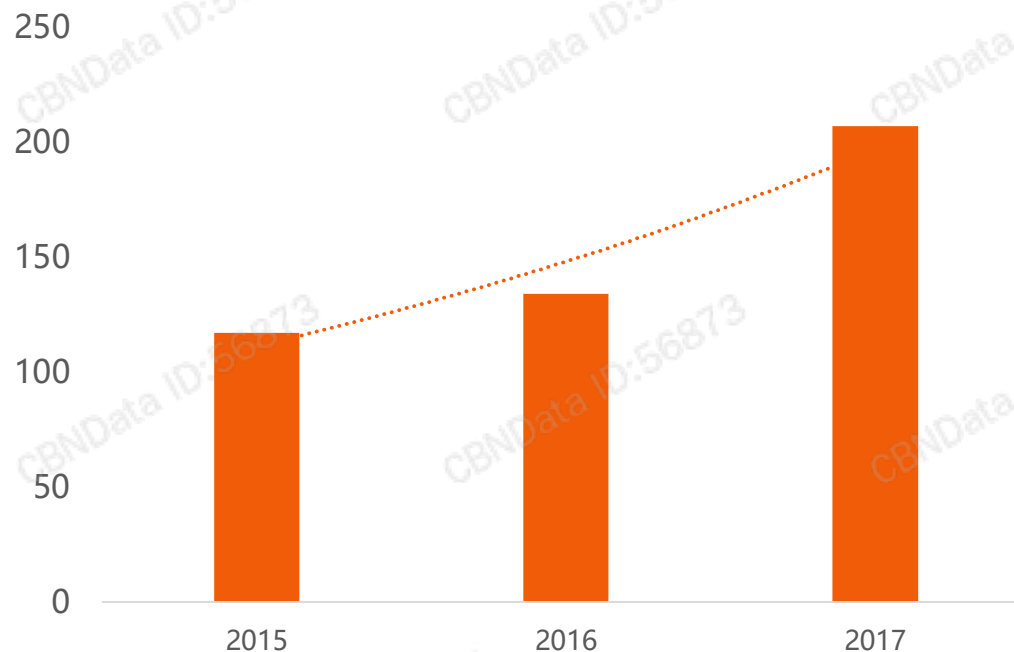
Singapore-brand Sales Trend And Share% In Total Cross-border

消费金额 sales amount 在跨境消费中占比 share% in total cross-border



中国跨境消费中新加坡品牌数增长趋势

Number Of Singapore Brands On Cross-border Platform



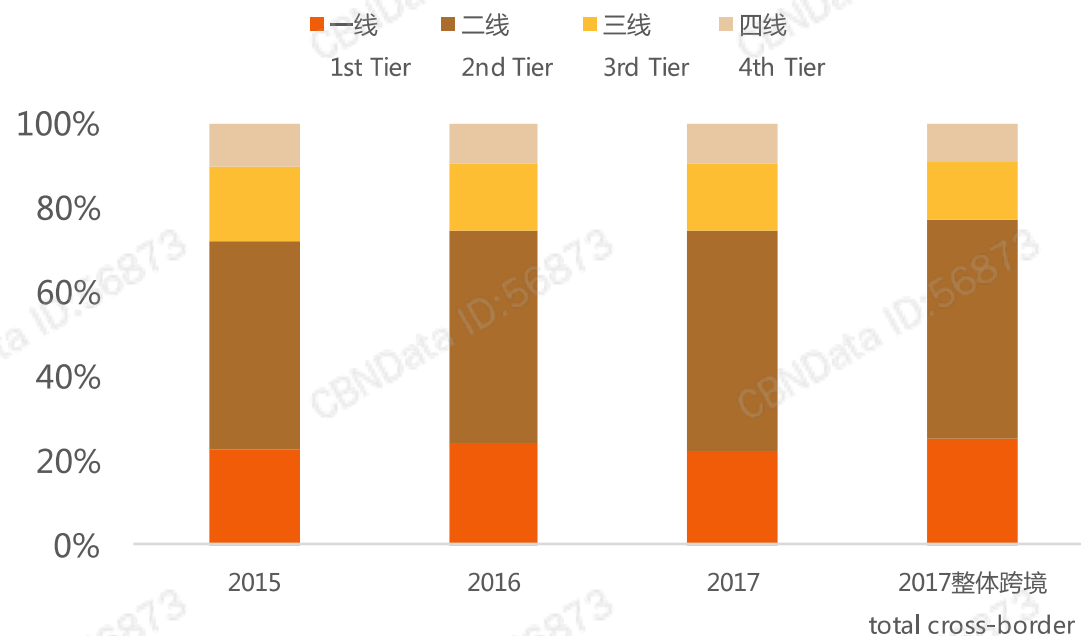
数据来源：阿里数据 Source: Alibaba data

# 新加坡品牌消费者画像

## Customer Profile Of Singapore Brands

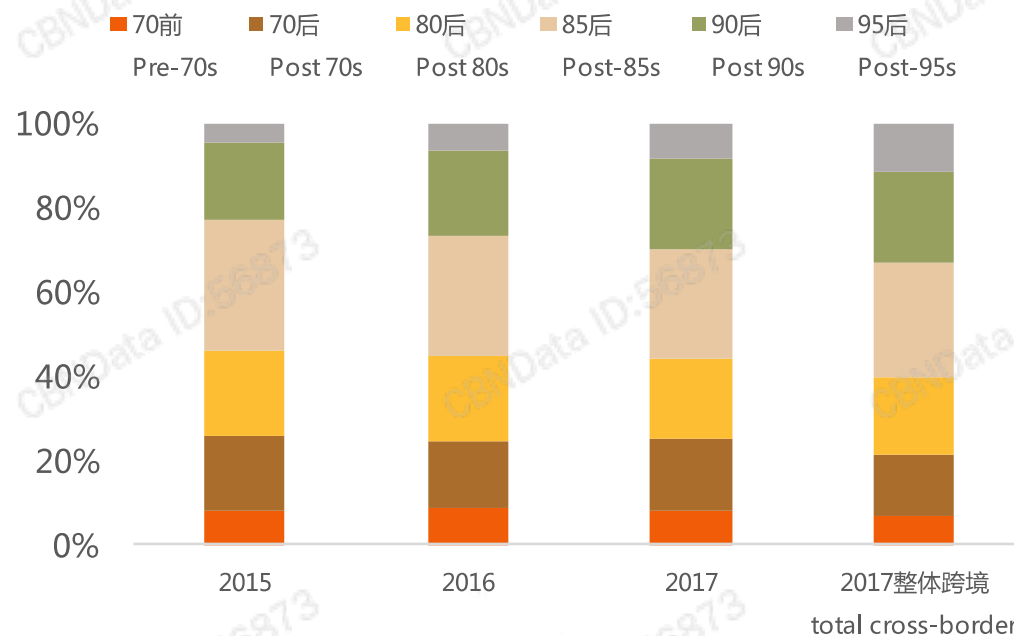
新加坡品牌商品消费者在各线城市消费金额分布

Sales Distribution Of City Tiers  
For Singapore-brand Vs Total Cross-border



新加坡品牌商品各年龄段消费者消费金额分布

Sales Distribution Of Age Groups  
For Singapore-brand Vs Total Cross-border



数据来源：阿里数据 Source: Alibaba data



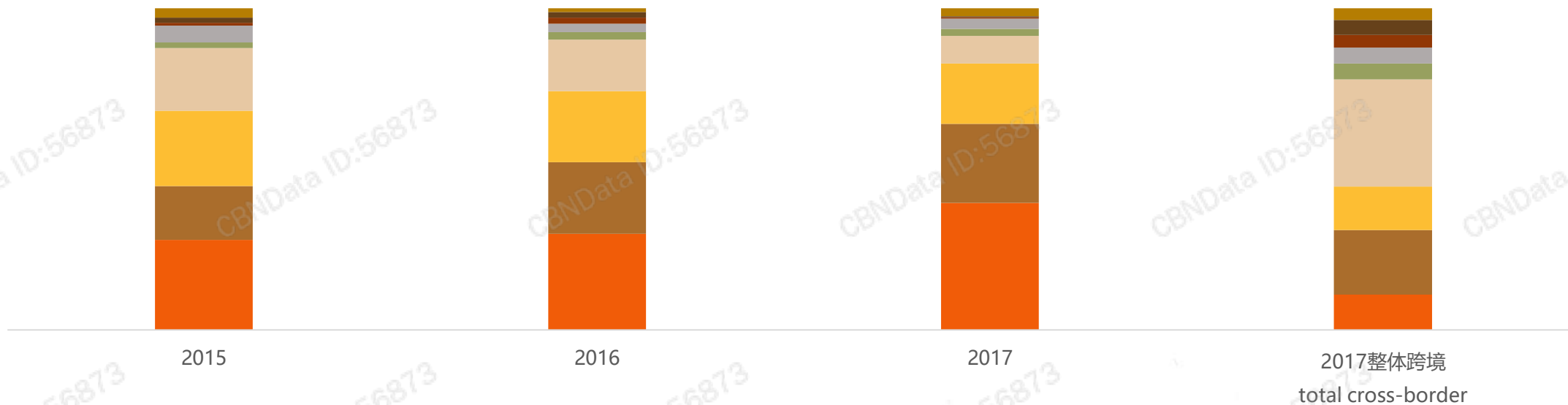
# 食品/保健为最大类目

## Food/Health Products Are Biggest Industry

新加坡各品类商品消费金额分布趋势与整体跨境消费分布对比

Sales Proportion Of Different Industry Singapore-brand Vs Total Cross Border

■ 食品/保健 food/health ■ 服饰鞋包 apparel and shoes ■ 母婴 maternal and baby ■ 美容护理 beauty care ■ 家居用品 household items ■ 运动/户外 sports/outdoors ■ 3C数码 3C digital ■ 珠宝/配饰 Jewelry/accessories ■ 其他 others



数据来源：阿里数据 Source: Alibaba data

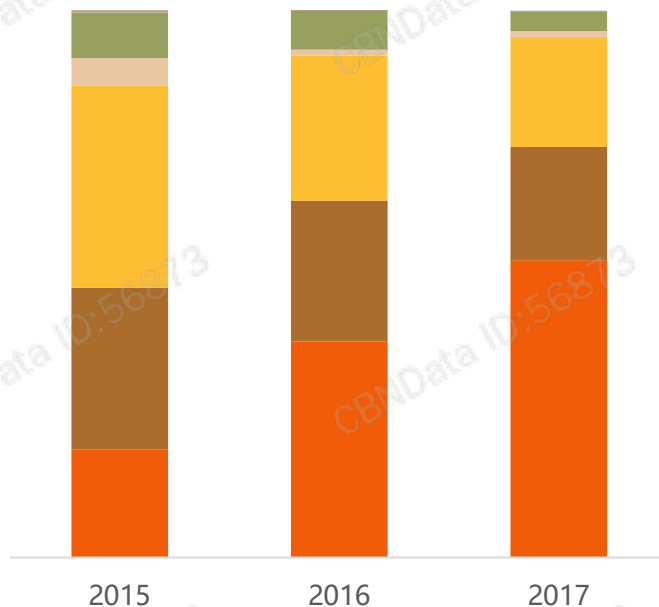
# 保健品呈现爆发式增长

## Singapore-brand Health Products Show Booming Growth

### 新加坡食品/保健类各品类消费金额分布

Sales Proportion Of Different Categories In Food / Health Industry

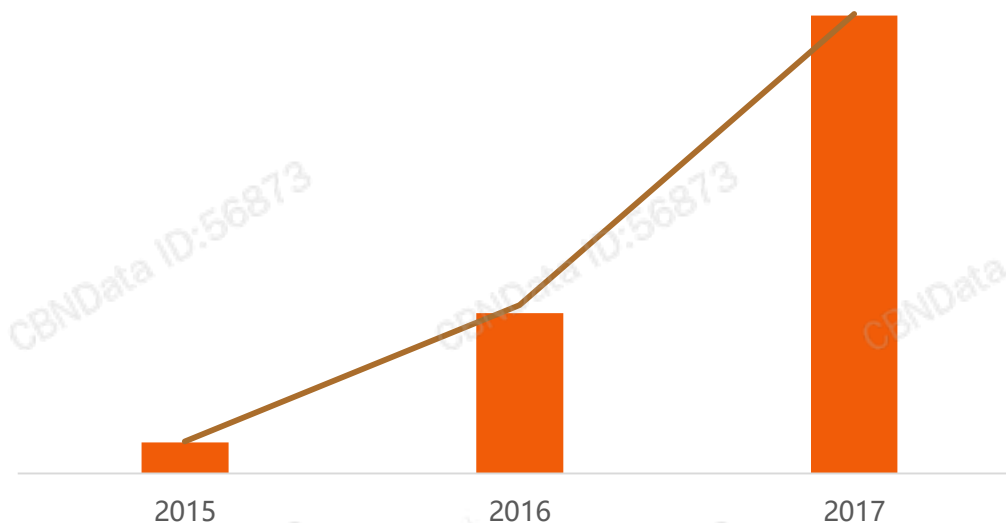
- 酒类liquor
- 水产肉类/新鲜蔬果/熟食meat / vegetable / fruit
- 粮油米面/南北干货/调味品rice grain and oil
- 零食/坚果/特产snack
- 茶/咖啡/麦片冲饮tea / coffee/instant drinks
- 传统滋补营养品traditional tonics
- 保健食品/膳食营养补充食品health products



### 新加坡保健品消费金额与购买人数增长趋势

Sales Amount And Number Of Buyers Trend Of Singapore Health Products

- 消费金额 sales amount
- 购买人数 number of buyers



数据来源：阿里数据 Source: Alibaba data

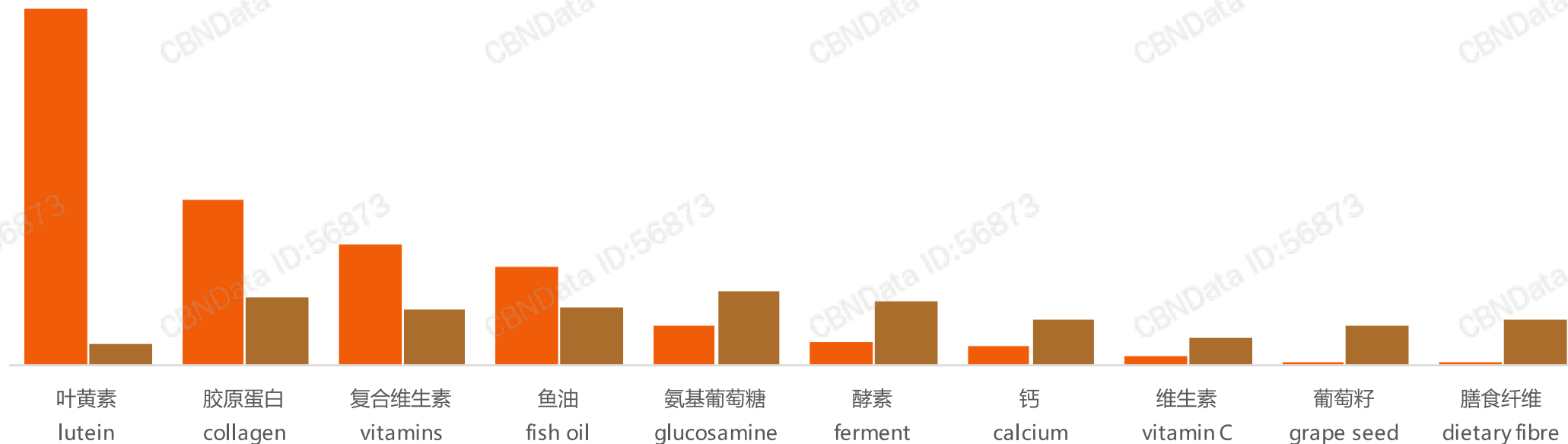
# 新加坡保健品功效较为集中

## Singapore-brand Health Care Products Are Concentrated

2017年新加坡保健品消费金额分布对比整体

2017 Different Health Care Products Proportion

■新加坡品牌 Singapore-brand ■整体跨境total cross-border



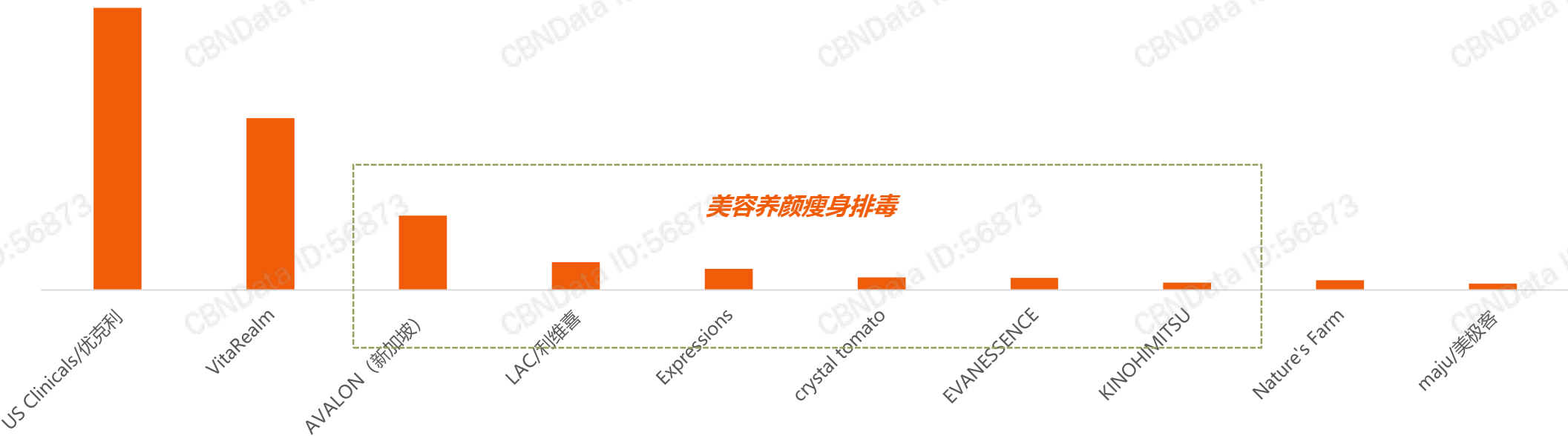
数据来源：阿里数据 Source: Alibaba data

# 驱动新加坡保健品增长的主要品牌

Growth-driven Brands Of Singapore Health Products

新加坡保健品品牌消费金额增长贡献度%

Sales Growth Contribution% By Brands



数据来源：阿里数据 增长贡献度%：各品牌两年之间销售额增长/整体品类销售额增长

Source: Alibaba data Sales Growth Contribution%: sales Growth Amount Of Different Brands/Sales Growth Amount Of Total

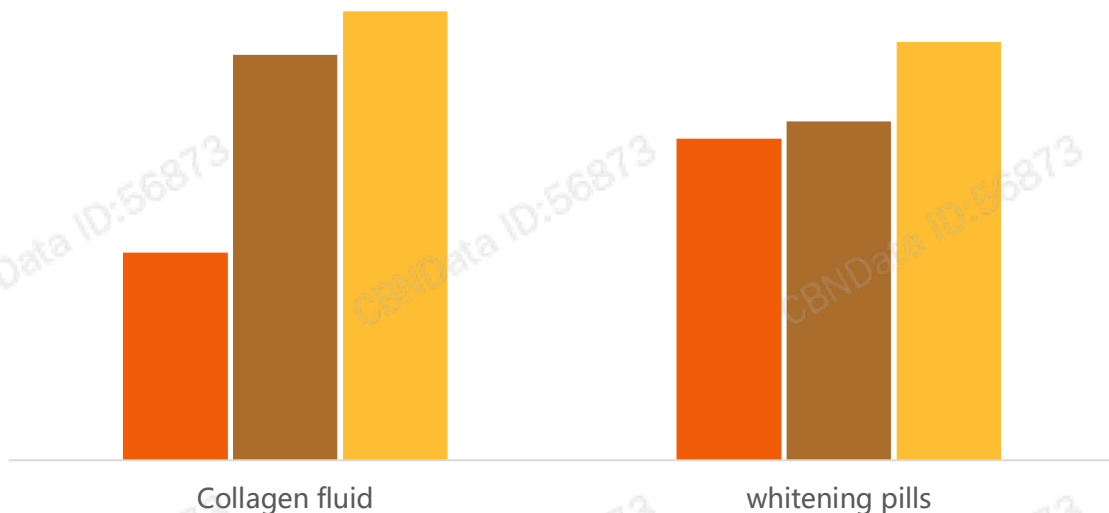
# 美容类保健品成为趋势

Beauty Health Care Products Become More Popular

美容类保健品消费金额在整体保健品中占比

Sale Proportion% Of Beauty Health Products In Total Health Products

2015 2016 2017

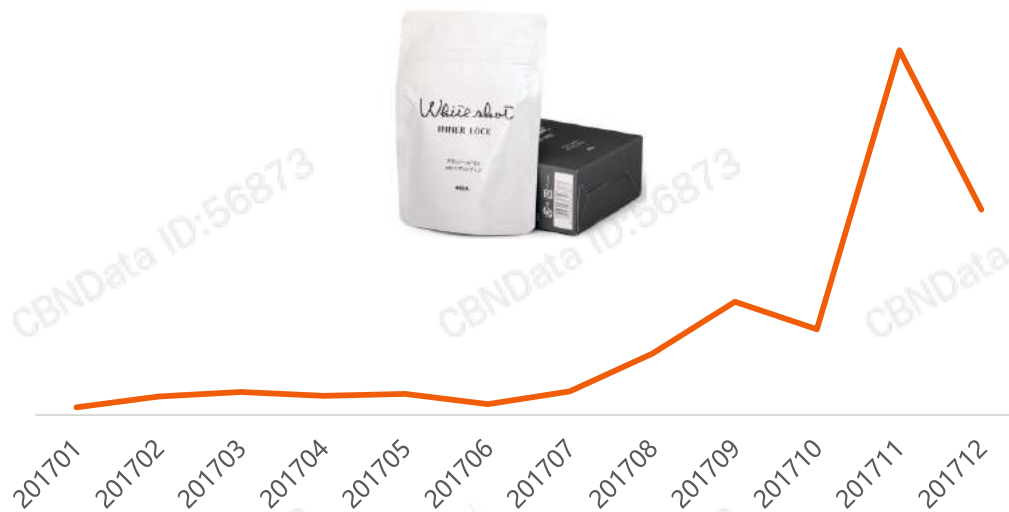


以POLA 为代表的美白丸产品2017年增长迅速

Sales of whitening pills such as POLA grew rapidly in 2017

Pola美白丸消费金额趋势

POLA Whitening Pills Sales Trend



数据来源：阿里数据 Source: Alibaba data

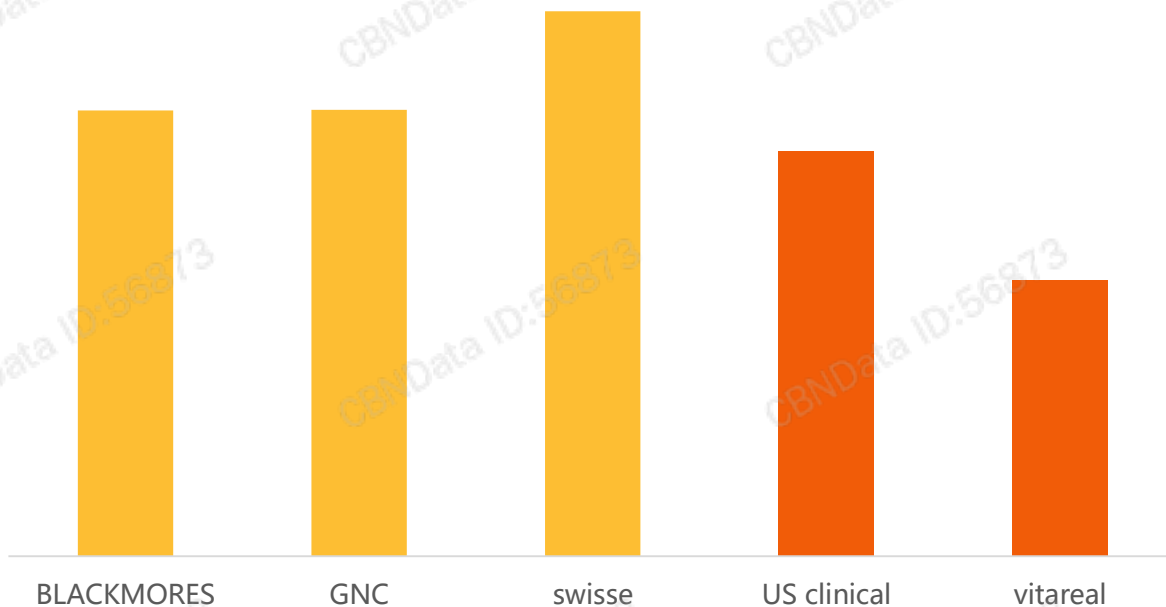


# 充分利用电商节大促

Put More Emphasis On On-line Shopping Carnival

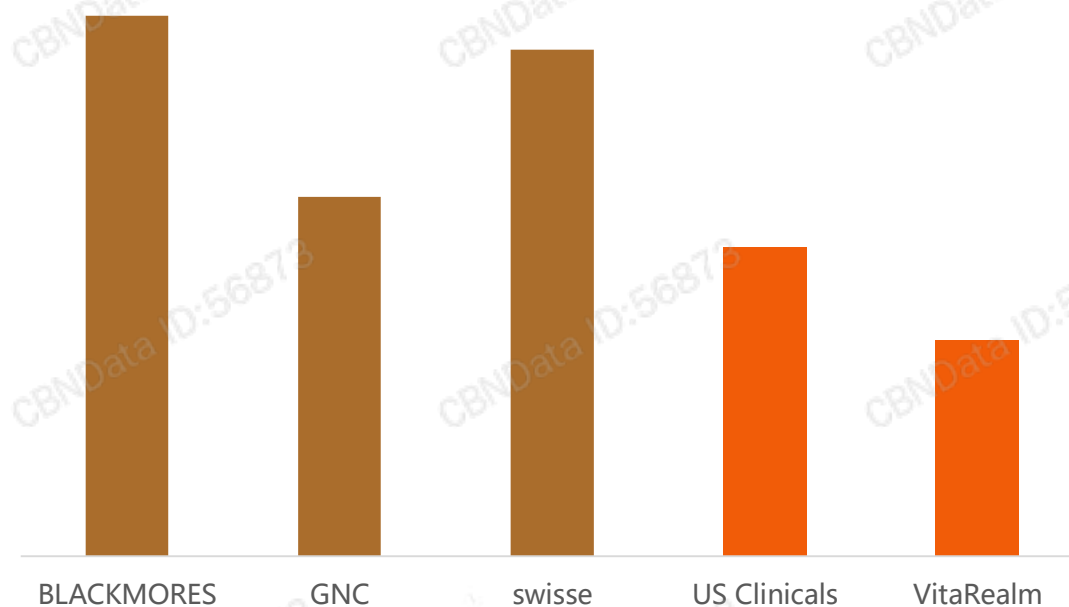
2017年 双十一当天消费金额对全年消费金额贡献度 (%)

2017 Sales Contribution% Of Double 11 To The Whole Year



2017年双十一当天新用户占全年新用户的比重 (%)

2017 New Consumers Contribution% of Double11



数据来源：阿里数据 Source: Alibaba data

# 04

## 趋势展望 Trends Forecast

### ■ 内容化营销成为关键 Content Marketing Becomes Essential

消费者愈发注重互动和情感交流，平台内容渠道选择多样

Consumers Pay More Attention To Interaction And Emotional Communication

### ■ 产品创新推动爆款不断出现 Innovation Drives The Boom Of Hot-Sell Products

消费者爱尝鲜，富含创新与科技感的产品不断受到消费者追捧

Products Full Of Innovation And Technology Are Constantly Admired By Consumers

### ■ 数据赋能精准营销 Big Data Enables Precision Marketing

通过大数据分析挖掘等技术深入洞察用户需求, 实现更加个性化、差异化、精准化的营销

Through Big Data Analysis And Mining, We Can Penetrate Into The Needs Of Consumers And Achieve More Personalized, Differentiated And Precise Marketing.

## 声明

**数据说明：**数据来源于阿里巴巴平台大数据，汇集5亿活跃消费者、超过1000万商家、10亿件商品的基本信息和行为数据，全方位洞察消费特征和行业趋势，助力商业决策。

### 指标说明：

- 本报告中国地域范围仅包括大陆31个省市；
- 消费者数据时间维度：2015年1月-2017年12月；
- 城市线级：基于消费者最近半年的常用收货地址确定；
- 订单随机抽样：随机抽取跨境平台(淘宝全球购+天猫国际)5%的订单，对于新加坡品牌相关商品随机抽取20%订单。
- 为了保护消费者隐私和商家机密，本报告所用数据均经过脱敏处理。

## Declaration

Source: Alibaba Big Data that brings together basic information and behavioral data of 500 million consumers, more than 10 million sellers, 1 billion pieces of goods, and offers a full range of insight into consumer characteristics and industry trends, helping decision-making in business

### Indicator Description:

- The regions in this report cover only 31 mainland provinces and municipalities unless otherwise specified.
- Data time dimension: Between Jan 2015 and Dec 2017;
- City tiers: Based on commonly used shipping addresses of consumers in the previous half year;
- Data: random sample which is 5% of orders from Taobao and Tmall cross-border platform. For Singapore –brand orders, the sample is 20%;
- The data used in this report are desensitized to protect consumer privacy and confidentiality of sellers.

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- Anyone who violates the rules shall be the infringement of the copyright of our company. Our company will investigate its legal responsibility and investigate the liability of the infringer according to the actual situation.

## 第一财经商业数据中心介绍:

**第一财经商业数据中心(CBNDData)是基于大数据进行智能化商业研究咨询与整合营销传播的战略数据平台**, 依托阿里巴巴和第一财经的优势资源, 拥有全球最大消费者数据库和中国最大的财经全媒体集群。第一财经商业数据中心(CBNDData)以商业数据报告/微报告、数据指数、定制化咨询等为核心产品, 输出消费行业的全景分析以及面向企业和消费者的深度数据洞察; 同时通过数据可视化、原生内容、活动、视频/直播等形式拓展数据研究的业务边界, 丰富数据商业化的应用场景, 以数据加媒体的倍增效应, 全面提升中国商业世界的运行效率。

## CBNDData Introduction

CBNDData is a strategic data platform based on big data for intelligent business research consulting and integrated marketing communication. Relying on the advantages of the Alibaba and CBN, we have the largest consumer database and the largest financial media cluster in China. With core products of commercial data report / microreport, data index, customized consultation, CBNDData outputs analysis of consumer industry and deep data insight for enterprises and consumers, and expands boundary with data visualization, original content, activity, video / live, enriches the application scene of the data commercialization, and improves the operational efficiency of the Chinese business world with the multiplier effect of data and media.



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**谢谢**  
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