

Pulse of China

May 2024

ACCESSORIES & JEWELLERY



**WHAT IS THE CHINESE TRAVELLER
LOOKING AT
FOR MAYDAY WEEKEND
AND SUMMER HOLIDAYS?**

REGULAR FEATURES

What were the most searched and viewed topics in the month of April in China?

Your Monthly update on what Chinese consumers are thinking, feeling and exploring

Brought to you by Searchlight Management Consulting

Data provided by Xiaohongshu (小红书)

Searchlight

小红书

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Accessories and jewellery

A large part of the fashion category in any market is accessories and jewellery – ranging from high end, precious stones and metals all the way to what is often termed costume jewellery.

We start off by looking at search keywords most commonly used in this category.

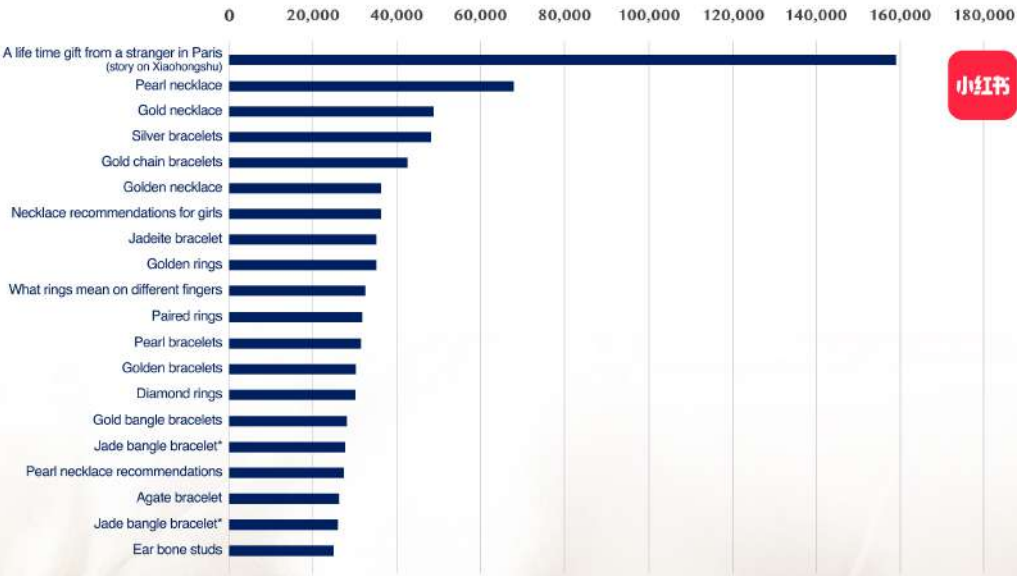
1. Top keywords in this category relate mostly to specific items and materials – although two of the phrases are linked to popular stories rather than product specific content

The top search phrase in this list is for a story that became very popular on Xiaohongshu – a Chinese couple travelling in Paris struck up a conversation with an elegant elderly French lady, at the end of which she gifted the young girl a ring from her finger. There is also the 10th ranked topic that is about the significance of a ring worn as signalled by the finger it's worn on.

Apart from those two topics however, as you look down the list, the vast majority of searches are for posts about specific details of different types of accessories and materials and the differences in numbers between the 2nd and 20th are not very steep, suggesting a wide range of interests among consumers across different accessories and materials. Necklaces and bracelets appear to have the most top search phrases associated with them, while rings, apart from the social media story that tops the list, are not as prominent.

A word here on some of the English names we've used – a gold ring or necklace is definitely made of gold whereas “golden” could refer to something made from gold or something that looks golden – so there is some overlap and fuzziness between the terms as it relates to either a look or a material.

Top search keywords



Source: Xiaohongshu keyword search Index Apr 1 to Apr 30, 2024

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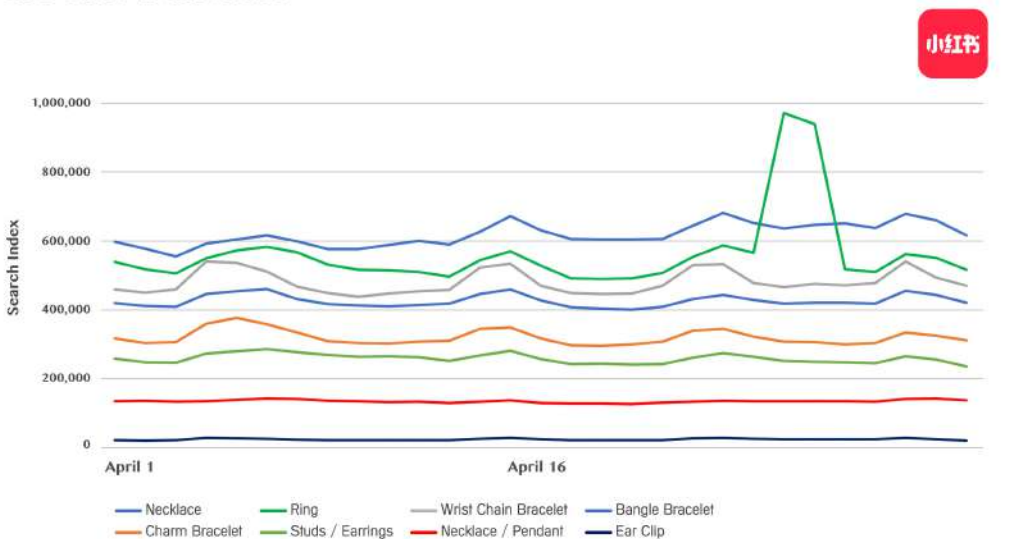
** The double reference to jade bangle bracelets is because of two slightly different Chinese search terms – one of which specifies the word "手" - or hand in the search term – the two terms essentially refer to the same item*



Looking at search and reading behavior categorized by specific accessory types across the month, however, shows a stronger interest in necklaces and bracelets than in any other form of accessory. Bracelets have 3 quite specific search terms in Chinese – corresponding to charm bracelets, chains and solid bangles respectively – each of which is quite a distinct format with specific words associated with them. Content and searches are classified on the basis of the three different terms. The late peak in interest in rings, by the way, relates to the social media story we referred to earlier – about the elderly French lady who gifted a ring to a Chinese tourist in Paris.

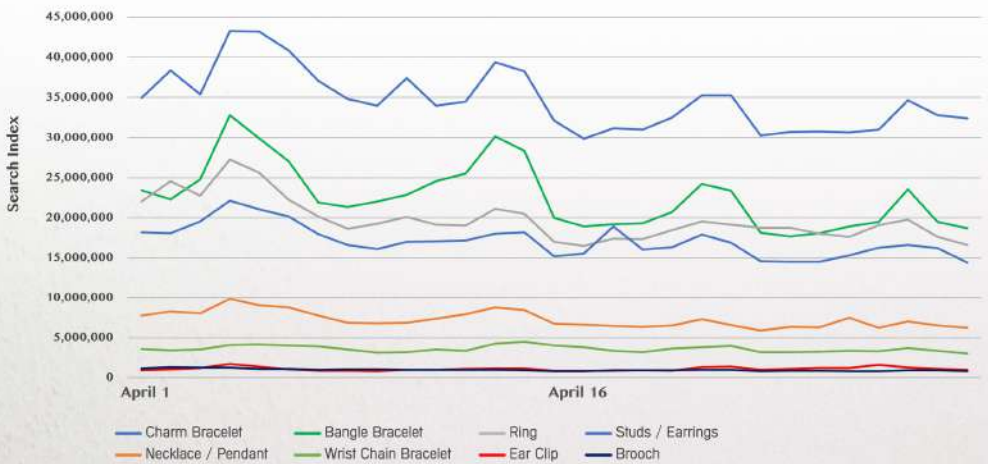
2.Necklaces dominate as an individual item but there are 3 types of bracelets that collectively lead search in this category – pointing to bracelets as a more common area of interest and easier entry point for consumers into fashion accessories

Necklaces are the most searched item but the 3 different bracelet related searches would dominate if added up. Earrings and studs are also highly searched whereas ear clips, collars and brooches are of low interest



3.Bracelet related posts dominate the posts read by consumers this past month in this category – lending credence to the thought that this is a good entry point for brands

Bracelets dominate reading index with rings and earrings / studs much further behind



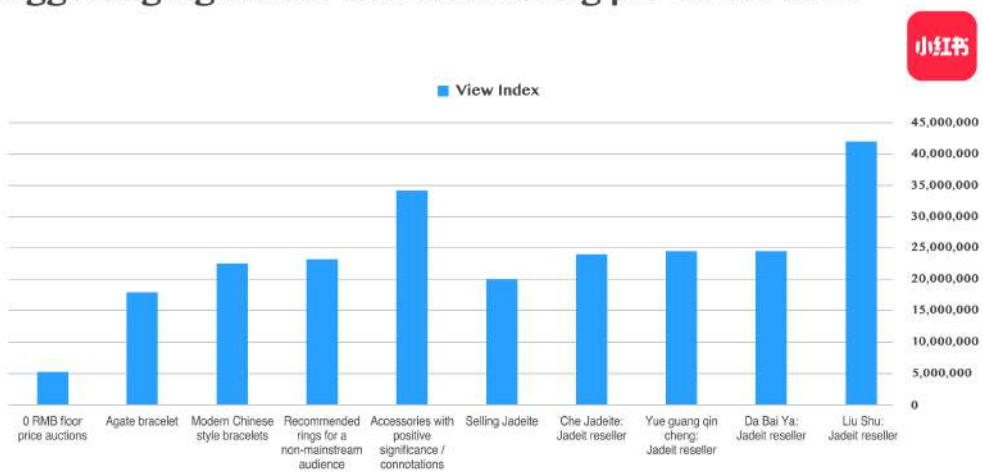
Source: Xiaohongshu product keyword posts read index Apr 1 to Apr 30, 2024

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4. Most read topics are dominated by posts from resellers (selling agents) - depicting an active market for pre-owned jewellery and accessories

Most read topics dominated by posts from (about) resellers – suggesting significant interest in selling pre-owned items



Source: Xiaohongshu top accessory related topics – by post viewing index from Apr 1 to Apr 30, 2024

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Surprisingly, the top 5 posts read all are from (about) resellers – companies that will sell pre-owned jewelry on consignment or commission basis. The high interest in these posts suggests that a large number of consumers are looking to sell their jewelry, since the posts are specifically about how that works.





Summary

Necklaces, bracelets and - to a lesser extent - rings are clearly a dominant topic in consumer minds when it comes to jewellery and accessories – although when moving to specific posts and topics interests are more varied and consistent across a wide range of accessories and materials. A look at specific post topics read suggests that at the moment, many consumers are thinking about selling off some of the items they own – perhaps linked to the quieter economy of the last 18-24 months.

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***Revisiting the Chinese traveller
with the Mayday long weekend
and summer holidays***

In one of our earlier newsletters (November 2023) we'd referred to the Chinese traveller and analysed the destinations they were searching and reading about. With the summer holidays not far away, it seemed like a good time to revisit this topic briefly.

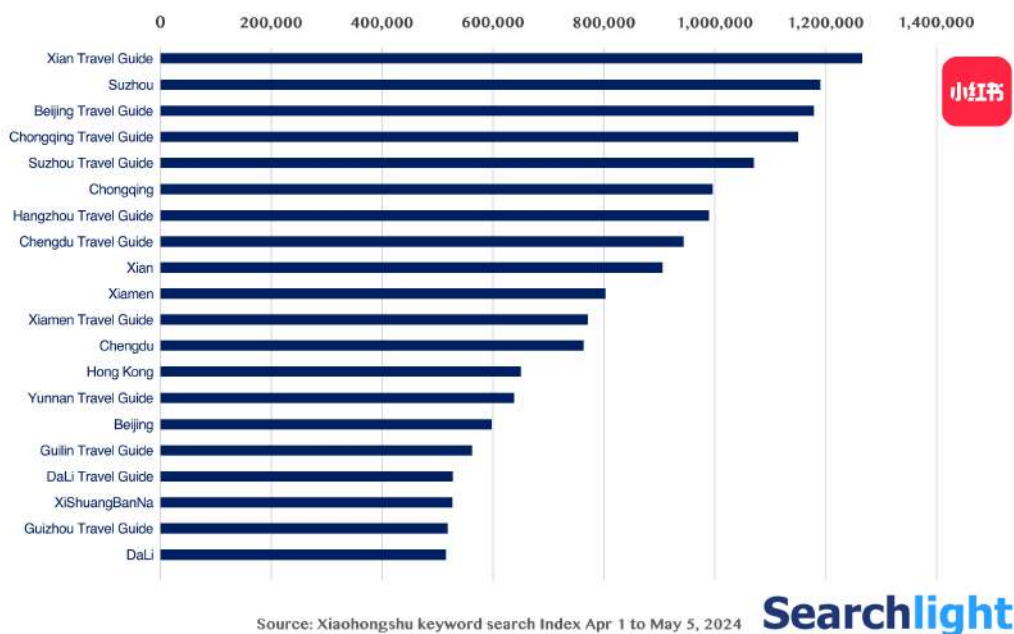
Given that we also had a long weekend early in May and some of the April data could reflect what consumers were searching for in the context of that holiday, we extended the data period for travel related search to May 5th in order to get past the planning for the long weekend and have a view of what consumers may be thinking about for the upcoming summer holidays.

However, the focus on nearby destinations suggests that most of the data is still from the period when people were planning for the week off in May, rather than a longer holiday in summer. That is interesting in itself, because even by early May, there isn't a lot of focus on long haul destinations, which could suggest that they're still off the radar, or perhaps most people haven't starting planning for the summer holidays (which typically start in mid-June, not that far away). Either way, it does appear that we won't be seeing the Chinese traveller going far afield for quite a while.

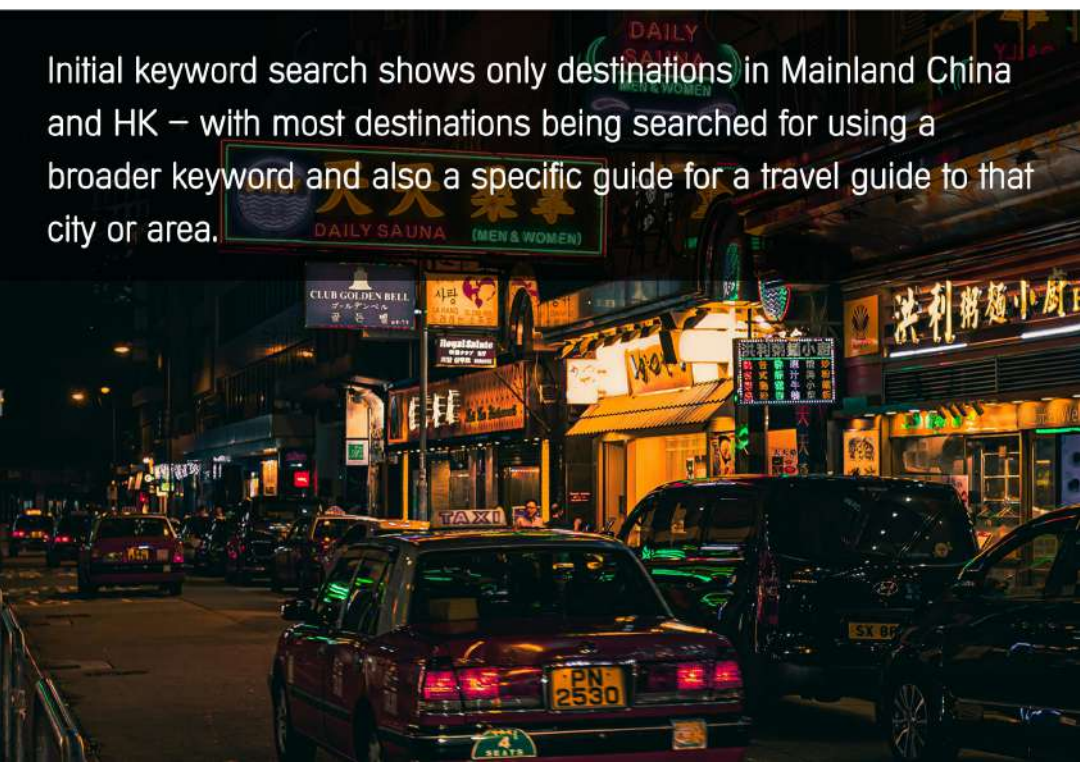


1. Search is dominated by domestic destinations which suggests mostly short - term planning for the Mayday long weekend

Top 20 search keywords are ALL for mainland China destinations (except for HK)

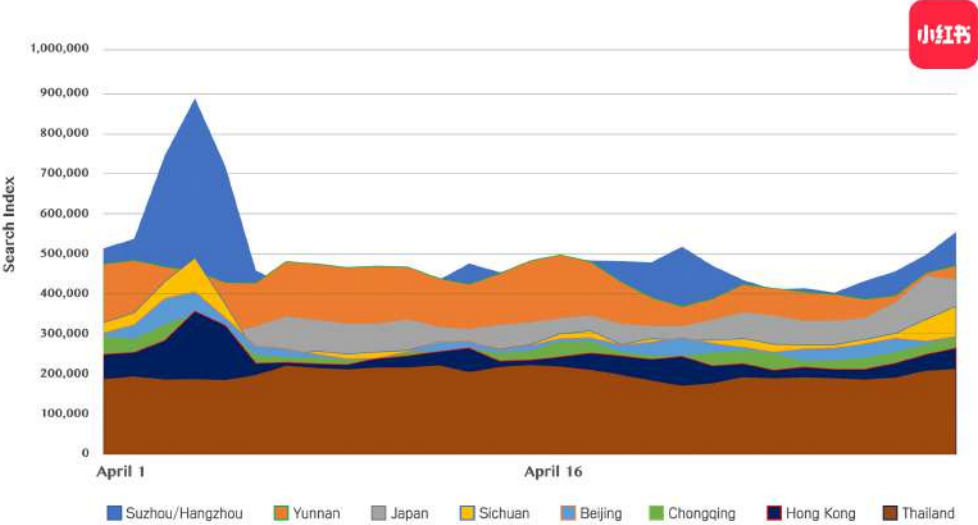


Initial keyword search shows only destinations in Mainland China and HK – with most destinations being searched for using a broader keyword and also a specific guide for a travel guide to that city or area.



2. Across the month, domestic destinations dominate search with only 3 international destinations in the top 8 searches. Europe (11), Macau (14), S.Korea (15) and Singapore / Malaysia (17) are in the top 20, Maldives is the 29th on the list. Cruises show up as a separate search keyword, rank 13

Japan and Thailand the only foreign destinations to show up in top 8 searched across the month

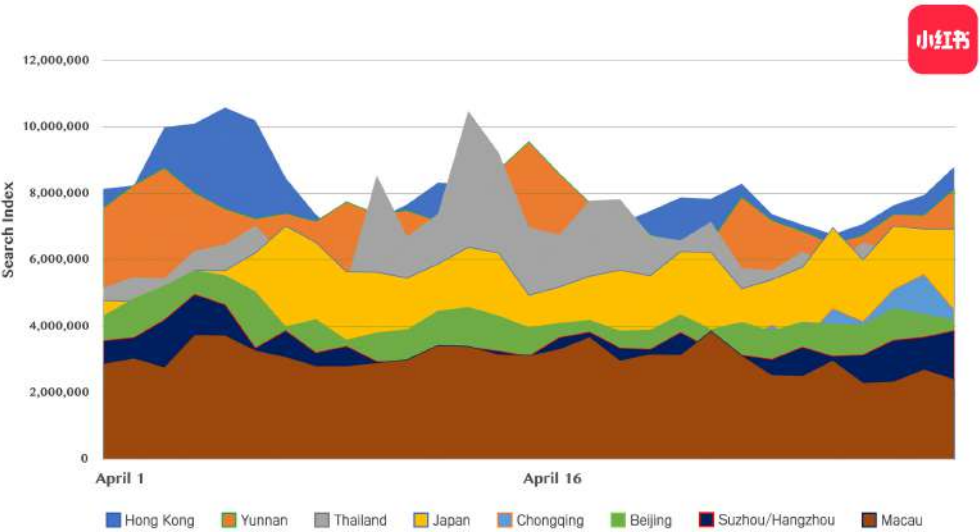


Source: Xiaohongshu travel destination keyword search Index Apr 1 to May 5, 2024 **Searchlight**

Japan and Thailand are the only foreign destinations that show up in top searches – Thailand has long been a favorite for Chinese consumers because of the proximity and visa-free entry. HK, while still an overseas destination with different travel requirements than within mainland China, has become much more accessible for Chinese citizens in recent times.

3. When it comes to posts read, nearby overseas destinations dominate – HK, Thailand, Japan and Macau. Korea (14) SE Asia (17) and Europe (19) seem less interesting from a posts-read perspective, suggesting lower intent to plan a trip here

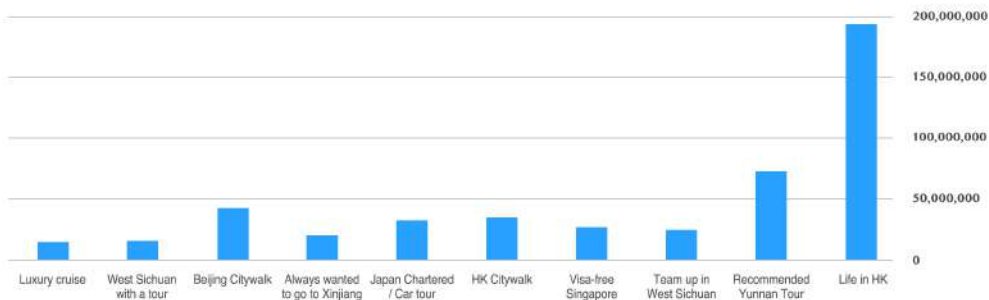
Nearby overseas destinations dominate posts read – suggesting greater interest in researching these destinations and perhaps an intent to make longer term travel plans to them



Source: Xiaohongshu travel destination keyword search Index Apr 1 to May 5, 2024 **Searchlight**

4. Most read topics apart from a huge interest in “life in HK” show a large number of destinations and topics of similar interest levels and readership

Most read topics suggest a more long-term interest in HK beyond going there as tourist, while the rest are split across domestic and nearby / accessible overseas destinations



Source: Xiaohongshu top travel topics – by post viewing index from Apr 1 to May 5, 2024

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Interestingly, Singapore's recent move to offer Chinese travelers visa-free entry seems to have garnered interest, featuring in the top 10 topics read about in the past few weeks.

Summary

The overall level of interest in international travel still appears to be low – with most searches and posts read being about destinations in mainland China. This may be influenced by short-term plans for the extended Mayday weekend. However, there is some interest in nearby Asian destinations, which suggests that at least the more accessible, easy to enter tourist markets are still on the radar for Chinese travelers.



XIAOHONGSHU

HOT TOPICS of THE MONTH

Quite separately from our analysis of fashion accessories that we started this issue with, this month we're seeing a lot of interest on fashion related topics in the Xiaohongshu community, with the top few shown below.

Topic	Content Description	Views	Article Link
The return of the '90s (retro fashion)	Looking back at the 90s shows and fashion styles, some old styles of that era are again at the forefront of trends.	810 million	Article Link
"Everyone" Fashion week	3.17-3.24 Xiaohongshu's third "Everyone Fashion Week" is held in Yanqingli Old Street, Shanghai. Everyone can walk the catwalk and show us your personal style.	320 million	Article Link
Your personal collection of non-mainstream accessories	Show off your personal collection of niche jewelry, whether it is unique jewelry found abroad, niche designer works discovered with a discerning eye, or niche versatile high-end jewelry awards	150 million	Article Link

Fashion archive

Imitating show clothes, while it seems unattainable to many, is also a fashion journey that encourages self-expression and creativity.

110 million

[Article](#)
[Link](#)

Personal style
is also a fashion

Walking in the streets, we always become part of the street scene inadvertently. Let personal wear become a fashionable scenery. There are no dazzling stars, no luxurious scenes, only the most real versions of us.

53 million

[Article](#)
[Link](#)

Wonderful
Watches of 2024

April is a key month for fashion watches. Xiaohongshu watch lovers and fashion trendsetters are welcome to participate in the high-end watch exhibition WWG @Watches and Miracles 2024

13 million

[Article](#)
[Link](#)



We also looked beyond fashion-related topics and found some of the themes that consumers are interested in. As always, some of these are season specific, with themes around Mother's Day and the May holiday.

Topic	Content Description	Views	Article Link
The People's Movie Critics	Movie review for May holiday. One Sentence Relay Challenge, Use one word to prove you have seen this movie	370 million	Article Link
A message for Mom	The role of "mother" is just one of the many roles of women. This Mother's Day, I hope everyone will share their story of Mother's Day and express their love to mothers.	51 million	Article Link
Raising human cubs – a guide to care and nutrition for babies	Parents and mothers always encounter many problems - preparing for pregnancy? Prenatal check-up? Confinement? Feeding newborns... everyone shares useful pregnancy knowledge and experiences	42 million	Article Link
Record May Holiday with a dance	This May Day, wherever you travel, in the streets, at the seaside, in the grasslands, let us record our dancing with video	26 million	Article Link
MAG creativity (Manga, Anime and Games)	Post your cosplay, Manga, anime and games character costumes, and capture people who are the best at dressing up	18 million	Article Link



the platform, the users, and the consumers

Xiaohongshu is China's leading lifestyle platform that inspires people to discover and connect with a range of diverse lifestyles. As of the end of 2023, Xiaohongshu has attracted over 300 million monthly active users sharing content about their daily lives on the platform. On Xiaohongshu, consumers can search, read and share authentic content about all kinds of product categories and lifestyle related experiences and services. On Xiaohongshu, 90% of content on the platform are UGC (user-generated content) coming from ordinary users. Xiaohongshu has truly become the trusted source where ordinary people turn for making consumption decisions. Its average number of searches daily has exceeded 300 million. Xiaohongshu's users engage through authentic, interesting and useful content, building a relationship based on trust. They share, discuss and are constantly "seeding recommendations" about their favorite products and lifestyle trends. 70% of users are from the post-90s generation, and 50% of users come from first-and second-tier cities in China, representing strong spending power. Consumers can directly engage with a feed based on topics they are interested in, follow certain specific content creators or influencers, or search for content on specific topics and subtopics.

Marketers can look at broad sweep statistics to get a sense of what's hot in their category, which brands / segments / consumer needs and questions are most current. They can examine what content consumers are engaging with, separate brand content from UGC, and see consumer trends expressed in posts, content views, and searches.

If you want to know more about Xiaohongshu, come and explore our consumer experience for yourselves via the web on

<https://www.xiaohongshu.com>

小红书

ABOUT
XIAOHONGSHU



ABOUT US

Searchlight

Set up in early 2020, Searchlight is a boutique management consulting firm headquartered in Shanghai.

Our typical scope of work covers:

- a. Market and consumer analysis to identify opportunities
- b. Defining business strategy and business model to leverage these opportunities
- c. Brand architecture, proposition and positioning to deliver the strategy

Our team of 14 associates covers a wide range of specialist areas – marketing, advertising, media, content marketing, brand management, HR, CRM, sales management, technology, and business management. Each of us has at least 20 years of work experience, a large part of that in China.

We coach and assist client teams to make quality decisions for the business. We also assist in the design of organizational processes and financial models, especially building internal and external capabilities for strategy implementation.

We've worked with both international and local brands, startups and public listed companies - J&J, Hollister Medical and Pandora as well as Sunner Foods (a listed company that leads the food processing category with a 40-year history) and startups like Little Ondine, LeBunna and Unibrown coffee. For more about us visit

www.searchlightchina.com

If you want to convert information into usable insights and strategy, contact us:

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