

**April 2019**

## **Added Value in Dairy Drinks, Milk and Cream - UK**

“White milk continues to feel the benefits and drawbacks of its commodity status. A vast majority of consumers see milk as a staple in the household, underpinning near-universal usage. However, this also means brand differentiation remains challenging. Recycled plastics and sustainable farming garner sizeable minority interest in the milk and ...

## **Attitudes towards Casual Dining - UK**

“Gone are the days of restaurants operating with a one-size-fits-all business model. Brands have to decide if they want to go back to basics and provide intimate dining experiences for older diners or become a ‘third space’ for young people to hang out over food and drink.”

– **Trish ...**

## **Betting Shops - UK**

“With the new stake limit coming into play, the future looks bleak for the betting shops market. If operators can move away from their heavy reliance on gaming machines and towards improving customer experience and promoting a community spirit, they’re more likely to weather the storm”.

– **Zameira Hersi, Leisure Analyst**

## **Bread & Baked Goods - Ireland**

“Bread remains a staple in most Irish homes and as such, sales have remained positive despite the lingering popularity of low-carb diets. Although sugar consumption remains a concern, baked goods are somewhat exempt from this given the nature of the indulgence category and therefore offer an opportunity for brands to ...

## **Canadian Lifestyles: The Cost of Convenience - Canada**

## **American Lifestyles: Implications of Being On Display - US**

“Consumers have the option to switch off and disconnect from social media and online chatter by simply putting down their phones. Brands, however, don’t have this luxury. With an emphasis on transparency, consumers want to know exactly what they’re buying – from the provenance of the ingredients, to the labor ...

## **Automotive Retailing - Ireland**

“Growing negativity around diesel vehicles will see manufacturers produce fewer diesel cars in the coming years and more alternative-fuelled vehicles as eco-conscious consumers increasingly switch to cleaner-fuelled cars to reduce their carbon footprint and play their part in tackling issues such as poor air quality and climate change.”

– ...

## **Brand Overview: Food - UK**

“Consumers’ habits are changing, such as through the cutting of meat consumption or searching for healthier foods. However, such is the correlation between taste and purchase intent within the food sector that brands with a particularly premium or delicious image can leverage the superior experience that their product can offer ...

## **British Lifestyles: A New Understanding of Corporate Ethics - UK**

“The consumer understanding of corporate ethics has evolved and become much more sophisticated. Looking forward, this will make it much harder for businesses to buy customers’ trust by simply emphasising their environmental profile, while not making any changes to their fiscal or societal contribution. Businesses will consequently need a clean ...

## **Carbonated Soft Drinks - US**

"Canadians are approaching spending a little more conservatively, meaning consumers will need more to 'sweeten the pot'. For companies, a slowing economy also means that supporting margins will be a priority for companies. Moving into 2019, being mindful that 'value is in the eye of the beholder' will play a ...

## Children's Social Care - UK

"Although spending in the industry has risen as a whole, it has failed to keep up with growing demand for services. Alongside rising demand, there has been a reduction in funding for early intervention services, which has only added to demand pressures on the industry. This has highlighted the increasing ...

## Consumers and Retail Banking - China

"The number of accounts held by consumers has been steadily rising, with nearly every internet user in China maintaining a deposit account. By contrast, the credit card market still has plenty of room to grow as consumers are becoming more open-minded towards spending. The development of new technologies and the ...

## Cough, Cold, Flu and Allergy Remedies - US

"The majority of adults have experienced some kind of cold, cough, flu, allergy, or related symptom in the past 12 months. Over-the-counter remedies are the most common method for treating these ailments. Yet, after achieving growth from 2013-17, category sales softened in 2018. Mintel's forecast calls for a gain between ...

## Cruises - China

"Although the cruise market is currently in a transitional period, there is potential for market growth in the long term. It is important for companies to focus on service quality, differentiating activities and forming strong partnerships with travel agencies to achieve sustainable growth. Companies can tap into culture, popular themes ...

## Desserts - UK

"Despite growing consumer aversion to sugar, the CSD (carbonated soft drink) market remains one of the largest non-alcoholic beverage markets and one characterized by general stagnation rather than steep decline. 2018 was a strong year for CSD brands with sales growth occurring among most full-calorie CSDs and a revitalization of ...

## Construction - UK

"Construction is notoriously cyclical, but there are many factors influencing individual sectors and their cycles do not coincide with each other. To date, Brexit is impacting demand for commercial construction more than industrial construction, while public sector activity is more reliant on government policy, and housing remains buoyant."

— ...

## Cordials and Squashes - UK

"The 2018 summer heatwave was a boon for cordials and squashes that saw growth return following five years of decline. However, sales in this traditionally family-oriented category have also been lifted by the strong performance of new adult-oriented options that offer more sophisticated flavour profiles. Meanwhile, British fruit can be ...

## Courier and Express Delivery - UK

"The courier and express delivery market is booming, much of which is underpinned by surging online retail sales. However, the marketplace remains hugely competitive, marked by slim margins and a growing expectation to provide more for less. For those still in the market, the future looks bright given continued value ...

## Desserts & Sweets Consumption Habits - Brazil

"As the initial discussion on being healthy or indulgent has passed, the category begins to realize there are many ways of providing healthy attributes and benefits to different types of consumers and consumption occasions without necessarily losing flavor. It is important to bear in mind, however, that many times the ...

## Digital Trends (Consumer) - US

"Desserts face competition from an array of other foods for the traditional after main course occasion, emphasising the need for continuing innovation. Traditional desserts with new flavour twists and desserts from other countries are untapped opportunities, while being extra-indulgent, visually appealing and offering flavours not currently on offer play a ...

## Digital Trends - China

"Consumers might have a desire to switch off, but their ownership and usage trends of digital products reveal their increasing addiction to the online world. They are passionately pursuing the upgraded and new functions and are enthusiastic to be the decision-makers of purchase. However, they are not so interested in ...

## Electronics Retailing - US

"Buoyed by a relatively stable economy, the CE (consumer electronics) retailing industry is enjoying an upward sales trajectory with no end in sight. Amazon has usurped Best Buy in sales, but Best Buy's strong service model and exemplary omnichannel approach keep it alive and thriving. In the future, digitally native ...

## Facial Masks - China

"As a fast-growing market, the facial mask market is facing fierce competition from functional aspects to value-added emotional aspects. Consumers' upgraded demands for mental relaxation provide an opportunity for brands to invest in a ritualised facial mask routine. Under the influence of the premiumisation trend, product innovation could be around ...

## Footwear Retailing - Europe

"Demand for footwear has grown almost everywhere in the last five years, but unlike in so many other retail sectors, the footwear specialists, and certainly the larger multiples, have been able to broadly maintain their share of sales. Many of them have expanded their own online propositions, expanded their store ...

## Footwear Retailing - Germany

"Consumers have accepted the vital role that technology plays in their daily lives. Media preferences dictate how new technology is used and where people spend most of their time online. New software will likely focus on speed and reliability rather than "wow" factor to sustain long-term engagement."

## Disposable Baby Products - US

"The disposable baby products market is estimated to reach \$8 billion in total 2019 retail sales, a decline of nearly 1% from 2018. Market struggles can partially be attributed to declining birth rates, parents' value-driven approach to the category, as well as increased competition from online retailers and subscription services ...

## European Retail Briefing - Europe

**This month's European Retail briefing includes:**

## Facial Skincare and Anti-aging - US

"Growth has slowed for the facial skincare and anti-aging market, as the category competes with both internal and external factors. Consumer demand for multibenefit products continues, and an emphasis on clean skincare could be a challenge to mature, established players. Lastly, reasons for using face masks have shifted slightly, with ...

## Footwear Retailing - France

"Footwear retailing in France is changing as non-specialists, such as sports, fashion and online-only retailers, are capturing more spending. The middle market and those retailers stuck on the high street or in shopping centres are being squeezed as consumers' shopping preferences are changing. Selling shoes online can be challenging, but ...

## Footwear Retailing - Italy

“For the majority of the retail sector the underlying dynamic is the challenge from online retailers. But the footwear specialists have suffered less than most and appear to be fighting back effectively. But that overall view is driven by the success of Deichmann and we think that many of the ...

## Footwear Retailing - Spain

“Specialist footwear retailers need to reclaim the territory that they have ceded, whether to non-specialists or online-only retailers, by focusing on their expertise, customer service levels and the quality of their products. To get back in the game with trainers/sneakers, some operators could benefit from acquisitions to gain a ...

## Fragrances - China

“With Chinese beauty consumers increasingly shifting to online, it is also becoming crucial for fragrance brands and retailers to expand their digital presence. However, digitalisation doesn't just mean selling products online or opening social media accounts; in the fragrance category, what's more important is how to evoke the sense of ...

## Hand, Body and Footcare - UK

“The growth of the market to £557 million in 2018 has been driven by bodycare as consumers don't understand the need for hand and foot products. Innovation trends create a focus on all-purpose products, meaning brands must develop personality to differentiate. Links to wellness could work for footcare; feeding the ...

## How Online Shopping for Electronics is Evolving for Consumers - US

"Electronics is among the most successful categories in online retail and is second only to clothing for purchase among online shoppers. Unlike other categories where fit, style and quality are more varied (eg clothing, accessories, footwear, home décor), electronics can be more effectively evaluated online based on descriptions. For emerging ...

## Juice - Brazil

“Italians spend the most per head on footwear of consumers in the big four European markets covered in this report series, making it an attractive and potentially lucrative market for footwear retailers. But growth in spending has slowed in recent years as consumer confidence has declined due to the country's ...

## Footwear Retailing - UK

“It has been a disappointing 2018 for footwear, with very little growth in value terms. The market has undoubtedly been affected by the current political uncertainty in the UK and people have been less willing to spend. Therefore, retailers offering value for money have performed better than others. The unpredictable ...

## Haircare - Brazil

“The haircare products market has been trying to bring innovations to Brazil. Several marketing campaigns and actions demonstrate the importance of the category in the country. However, consumers still seem to be afraid regarding the use of certain products – such as hair colorants – and some behaviors – such ...

## Hispanics' Attitudes toward Advertising - US

"The fast-growing US Hispanic population has reached 59.9 million and counting, or just over 18% of US consumers. With this group expected to increase significantly in both number and buying power in the years to come, it's a critical audience for marketers to reach. Still, like the average consumer ...

## Investment Trends - US

"The FinTech revolution has borne a stable of robo-advisor and other self-service investment options for the average consumer, and brought with it tools and products that were previously only accessible for wealthy investors at traditional institutions. But while consumers now have greater accessibility to the investment sector, the glut of ...

## Juice and Juice Drinks - US

“The survey shows 100% whole juices have appealed to consumers who are seeking healthy options, while powdered juices have attracted those who prefer affordable options without compromising taste. Products positioned in this middle range – not so cheap or so healthy – such as sweetened juice drinks and fruit nectars ...

## Lactobacillus Beverages - China

“Current innovation in lactobacillus drinks focuses on functional benefits and added nutrients. But in the long term, as consumers become more knowledgeable, they will realise the limitations of lactobacillus drinks in terms of functionality. Manufacturers and brands can position lactobacillus drinks as ‘the healthiest casual drink’ and bring novelty to ...

## Made to Order Smoothies - US

"Smoothies are a healthy menu item staple, and their popularity is continuing to grow. With more smoothie choices than ever for consumers to choose from, operators must target specific occasions and offer ingredients with strong functional claims to stand out from competitors, including retail. Moving beyond a one-size-fits-all approach and ...

## Men's and Women's Beauty and Grooming Routines - UK

“Ease remains essential when it comes to beauty and grooming routines, highlighting the relevance of convenience-related claims. However, with enjoyment in the category being high, brands can innovate in solutions that offer more sensorial benefits to drive routines. Health and environmental concerns could impact the category going forward; consumers may ...

## Mobile Phones - UK

“Consumers think the latest top smartphones are out of their price range and are less likely to upgrade their devices because of it. Manufacturers are aiming to offer better innovation and value for money through punch-hole displays and improved cameras. They will also be hoping 5G can help to boost ...

## Mortgages - UK

"The juice market encountered another year of sales decline in 2018, as it continues to struggle with a sugary reputation that perpetuates a sometimes less than healthy reputation and stiff competition from other beverages. However, younger adults, parents, and Hispanics still show high engagement as well as strong interest in ...

## Laptops, Desktops and Tablets - Canada

"Most Canadians are considering the purchase of a laptop, desktop or tablet within the next year. This indicates a positive trajectory for the category considering most already personally own or have these devices in their households. The importance of upgrades and replacement within the category is thus going to act ...

## Major Domestic Appliances - UK

“The majority of major domestic appliance purchases are triggered by replacing a broken or faulty appliance and this part of the market is fundamentally resilient. But more discretionary purchases such as those following house moves, refurbishing a kitchen or upgrading to the latest features have been held back in the ...

## Mobile Network Providers - US

The majority of the mobile telecommunications market consists of smartphone owners, and consumers are using more data every day. While pricing is the most important factor behind network choice, consumers are increasingly looking for unlimited plans. Network coverage and reliability are top considerations, but trust is a growing concern, especially ...

## Mortgage Advice - UK

“Despite the increased risk of an economic and housing market downturn as a result of Brexit uncertainty, many UK adults have plans to arrange a mortgage, remortgage or other type of home loan in 2019. Demand for remortgaging will remain strong.”

– Sarah Hitchcock, Senior Analyst

## Ocasões de Refeições - Brazil

“Due to the economic uncertainty of Brexit, the mortgage market is going through a difficult period. Total gross mortgage lending has slowed in the past two years and will likely stagnate in 2019. However, with mortgage rates still near all-time lows, remortgage activity should remain a bright spot. The weaker ...

## Online Dating - UK

“Many apps are moving away from the gamified swiping feature that drove Tinder’s popularity and helped bring online dating into the mainstream. Instead, focus is returning to helping make meaningful personality-based connections, with the aid of increasingly sophisticated artificial intelligence”.

## Parents' Online Shopping Habits - US

"Parents are active online shoppers and their varied needs cause them to shop a variety of items and retailers. However, that doesn't mean hesitation to buy online is non-existent and some parents require convincing to shop for more than just replacement or restock items and to feel comfortable buying more ...

## Property as an Investment - UK

“Following a challenging 2017, the buy-to-let market returned to growth in 2018. The sector is adjusting to the ‘new normal’ in terms of regulatory environment. Attracting investors may be harder, but there is an opportunity for providers to launch specialised products and create value with expert advice, reflecting market trends ...

## Residential Flooring - US

"A healthy economy and strengthening housing and renovation market have helped the \$26 billion residential flooring market notch steady gains since 2013. Despite the rise of renters, further improvements in the overall economy, coupled with a willingness to invest in the home, will allow consumers to update and upgrade their ...

## SAVE Tourism (Scientific, Academic, Volunteer, Educational) - International

“Para além do preço, atributos como saudabilidade e praticidade encabeçam as necessidades dos consumidores para as ocasiões de refeição, especialmente durante os dias de semana. Essas necessidades dão oportunidade para hábitos como o preparo de marmitas e lancheiras, assim como delivery, opções de fácil preparo e consumo em movimento, encurtando ...

## P & C Insurance - Canada

“As smart home features become more sophisticated and inter-connected, home insurance companies and consumers benefit though fewer claims and lower prices respectively.”

– **Sanjay Sharma, Senior Financial Services Analyst**

## Pasta and Noodles - US

"The pasta category remains sizable, but annual sales has been largely stagnant in recent years and is expected to decline. Concerns about carbs and weight loss appear to be strongly impacting consumer behavior. At the same time, health-oriented advances such as vegetables and protein in pasta could stem some of ...

## Quarterly Tracker: Cannabis - US

As the market for legal recreational cannabis takes hold and expands, opportunity exists to examine changes in attitudes and behavior related to the products, and adjacent categories. In this first quarterly cannabis tracker, we look at use, frequency of use, and reasons for using both cannabis and CBD-only products, ...

## Salty Snacks - Canada

"Salty snack consumption is on the rise in Canada. The industry continues to adapt to evolving consumer needs, and it is reaping the benefits. While consumers first and foremost see salty snacks as a treat and a means to satisfy their cravings, the majority of eaters of salty snacks also ...

## Seasonal Shopping (Autumn/Winter) - UK



“SAVE travel is a substantial travel niche comprised of the four market profiles of scientific, academic, volunteer and educational tourism, practised by a broad range of tourists who travel for different reasons, predominantly leisure and education but also business, taking part in a multitude of activities. As the desire for ...

## South Africa Outbound - International

“South Africa’s outbound market has posted moderate growth in recent years given its downbeat economy and the weak Rand. South Africans have a strong zest for travel and will work around monetary constraints to bring foreign trips to fruition. Travel behaviour has adapted to the tougher economic climate, encouraging South ...

## The Ethical Food Consumer - UK

“Widespread consumer doubts over whether their buying choices truly make a difference make it crucial for companies to explain to consumers the benefits to wider society of buying certified products. This would serve both to reassure the doubtful and tap into the strong feel-good factor around ethical food and drink ...

## UK Retail Briefing - UK

**This month's UK Retail briefing includes:**

## Vacation Planning - US

“Seven in ten (72%) of US consumers went on an overnight vacation in the last year. Their love of travel meant an estimated \$499.7 billion dollars in revenue for companies in the vacation travel industry, a number that is expected to grow steadily in the next five years. This ...

## Western-style Fast Food - China

“The recent performance of seasonal retail sales illustrates how susceptible these events are to macroeconomic changes. Following strong growth in consumer spending throughout 2018, with Valentine’s Day, Halloween and Bonfire Night all witnessing a significant uplift in consumer expenditure last year, the outlook appears to be more challenging. Consumers cut ...

## Special Interest Holidays - UK

“Special interest breaks are in sync with underlying trends towards more active styles of holidaymaking, ‘travel with a purpose’ and a wider consumer agenda of wellness which embraces physical fitness, stress relief and self-improvement.”

– John Worthington, Senior Analyst

## The Night In - Ireland

“Watching TV – both live and streamed are key night-in activities among Irish consumers in 2019, and with consumers seeking to cut back on out-of-home leisure spending, this might see increased usage of TV, gaming and other in-home activities moving forward.”

– Brian O’Connor, Senior Consumer Analyst

## UK Retail Rankings - UK

There are two major factors facing the retail sector in 2019 – the uncertainty over Brexit and the impact of online. That’s not to say that there aren’t others, from the general economic background and the housing market to business rates and the way retailers are taxed. But as we ...

## Waste Management and Recycling - UK

“The continued shift to a circular economy is set to require considerable investment in new recycling and reprocessing capacity in the UK. The government’s Resources and Waste Strategy for England, published in December 2018, sets out a number of measures which aim to increase investors’ confidence and improve the competitiveness ...

## 乳酸菌饮料 - China

“Consumers are concerned that having high-calorie and greasy Western-style fast food very often could cause health issues. Western-style fast food businesses could start to introduce healthy drinks, such as probiotic drinks, NFC drinks and infusion teas to mitigate the problems. Besides healthy drinks, consumers also show a high expectation of ...

## 数码趋势- 中国 - China

“消费者也许渴望回归线下，但他们对数码产品的拥有率和使用频率趋势却反映了他们日益沉迷网络世界。他们追求产品功能的升级和创新，而且热衷于充当数码产品购买决策者的角色。但是，他们对跨界产品兴趣乏乏，尤其是那些与品牌核心业务联系甚微的跨界产品。”

— 黄开意，研究分析师

## 西式快餐- 中国 - China

“消费者担心经常食用高卡路里、油腻的西式快餐会带来健康问题。西式快餐企业可以推出健康饮料，如益生菌饮料、非浓缩果汁饮料和冲泡茶饮来缓解这一问题。除了健康饮料，消费者也对轻食抱有很高期待，但轻食还有很长的路要走。如果商家想要在这一方面有所发展，可以考虑在家庭聚会场景中推出轻食。”

— 王皓，初级研究分析师

## 面膜- 中国 - China

“面膜市场增长迅速，竞争激烈，从功能性到附加情感益处均暗流涌动。消费者的情感放松需求升级，为品牌提供了开发仪式化面膜护理流程的机会。在高端化趋势的影响下，品牌可以围绕敏感肌展开产品创新，如医用面膜。”

— 周文棋，研究分析师

“目前，乳酸菌饮料的创新集中在功能性和添加营养。但从长远来看，随着消费者的相关知识日渐丰富，他们将认识到乳酸菌饮料在功能性方面的局限性。制造商和品牌可将乳酸菌饮料定位为‘最健康的休闲饮料’，并通过不断创新为消费者带来新鲜感。来自其他品类及餐饮品牌的新饮料产品、新元素可成为灵感来源。”

— 阿芳，研究分析师

## 消费者与零售银行 - China

“消费者拥有的账户数量稳步上升，几乎每个中国互联网用户都有一个储蓄账户。人们对消费的接受程度逐渐提高，信用卡市场仍有较大发展空间。新技术和线上渠道的发展扩大了银行的普及面。虽然金融科技继续占据头条新闻并给商业银行蒙上阴影，但银行实体网点和良好信誉仍是赢取消费者忠诚度的竞争优势。”

— 夏月，研究分析师

## 邮轮旅游- 中国 - China

“尽管邮轮市场目前处于过渡期，但从长远来看该市场潜力广阔。品牌要将重点放在保持服务水准、设计独具特色的活动和维持与旅行社的良好合作关系等方面，以达到可持续发展。品牌可将文化、流行主题和保健养生等元素融入船上活动、配套设施和岸上活动中，为消费者提供别出心裁的高端邮轮体验。”

## 香水 - China

“随着中国美容消费者越来越向线上转移，香水品牌和零售商也有必要扩张数字版图。但是，数字化并不仅仅意味着进驻电商或开设社交媒体账号；在香水产品类，重要的是如何在数字空间引发气味联想、提供感官体验，并最终帮助消费者找到合适的那款香。”

— 李玉梅，高级研究分析师