

**March 2018**

## Activities of Kids and Teens - US

For kids, few activities compare to the enjoyment and excitement that the internet, cell phones, and media can provide. The internet, in particular, plays a significant role in the types of activities kids are participating in now, and are interested in doing more of in the future. However, despite prevalent ...

## Alcoholic Drinks Consumption Habits - Brazil

"The soccer World Cup is expected to stimulate consumption of alcoholic drinks, but on the other hand health concerns can be a barrier. In order to find a balance, brands could take advantage of Brazilians' interest in innovations, investing in new releases and promoting new experiences. It's important, however, to ...

## Attitudes towards Home Delivery and Takeaway - UK

"Consumers' need for quick convenient meals is confirmed, as four in five Brits have bought takeaway food recently. Young working adults and parents are driving demand for weekly home deliveries, prompted by the rise of online ordering and third-party services."

– **Trish Caddy, Foodservice Analyst**

## Baby Food and Drink - US

"After two years of stagnating sales, the \$6.8 billion market for baby/toddler food and drink shows indications of growth ahead. Largely stemming from formula sales, the category is expected to leverage a number of healthy attributes and claims in premium-positioned products. Parents are seeking healthy attributes above all ...

## Black Beauty Consumer - US

Black women are less likely to use cosmetics in comparison to the general market, but her usage varies across beauty products due to her skill set, her knowledge of expected benefits, and most importantly,

## Alcoholic Beverage Drinking Occasions - US

"Dollar sales of alcohol (on- and off-premise) reached \$234 billion in 2017, a 3.5% gain over 2016. Overall sales increased by 20% from 2012-17 due to a supportive economic climate, product innovation – including flavor and format advancements – and a focus on premiumization, all which have encouraged trial ...

## Attitudes towards Data Sharing - UK

"Rising use of connected devices to access websites and apps has produced a wealth of personal data. The majority of people have some concerns over the extent to which they are sharing their data and how it is being used. After the implementation of GDPR, as people become more familiar ...

## Baby Food and Drink - UK

"With the income squeeze likely to further boost the popularity of homemade food, it is imperative for manufacturers to convince consumers that their products are worth paying more for. Highlighting ingredient provenance would help to project an image of quality and transparency, much needed given parents' low trust in brands ...

## Beverage Blurring - Canada

Hybrid beverages represent an opportunity for manufacturers to provide consumers with new and unique flavours. While "taste" remains the most important consideration for Canadian consumers when drinking their preferred beverages, nutritional benefits are a secondary consideration on par with affordability. There is also ample opportunity for growth of hybrid beverages ...

## Bottled Water - UK

"While the spotlight on plastic waste is a threat to the whole soft drinks market, the option of tap water and roll-out of water refill stations make this a more severe challenge for bottled water. Widespread feelings of guilt

her ability to find products in the right shades to create her desired look. Her beauty ...

## Brand Overview: Food - UK

“Expectations of brands and the categories they are in key to consumer perceptions. Breakfast cereals are a clear example of this. Health standards set by certain brands impact upon the way in which other brands that do not match up are viewed. Conversely, brands in treat categories largely avoid being ...

## Bundled Communications Services - UK

“Investment in fibre-to-the-premises will dramatically increase broadband speeds for consumers, and lead to increased revenue for operators as they charge more for ultrafast connections. Meanwhile, providers have also been benefitting from increasing uptake of mobile as part of a bundle of services, and effective handling of competition from over-the-top media ...

## Cakes, Cake Bars and Sweet Baked Goods - UK

“While this is a mature market in terms of overall usage, most people do not treat themselves to cakes and sweet baked goods that often, with scope for increasing frequency of usage. A mixture of activity is needed to appeal, as a broad spread of attributes are important to people ...

## Car Rental in Asia - Asia

“China’s car-rental market could grow at a double-digit yearly pace through the end of the decade as consumer tourism expands. In a recent research report, Credit Suisse estimated that the generation of Chinese born between 1985 and 1995 under the country’s one-child policy will contribute 35% of total consumption by ...

## Children's Products Retailing - China

“While growing well, the children’s products retail market is highly fragmented and competitive. The focus of that competition is now shifting from quality of products, towards more focus on quality of service.

among consumers over the plastic waste generated by drinking bottled water ...

## Bronzeador e Protetor Solar - Brazil

“O mercado de produtos de cuidados com o sol sofreu com a crise econômica brasileira, tendo apresentado queda em suas vendas em 2015 e 2016. Para os próximos anos, a previsão é de que as vendas aumentem graças à recuperação da economia. Porém, esse mercado sofre também com a concorrência ...

## Butter, Margarine and Oils - US

An ingredient or flavor booster in a wide variety of recipes and dishes, butter, margarine, and oils are used by nearly all consumers. While widespread penetration does challenge substantial growth, the overall category did manage a small gain, 1% from 2016-17, stemming from the gains of butter while margarine struggles ...

## Car Purchasing Process - UK

“The UK car market recorded a fall in sales in 2017 signalling a period of increased difficulty for those involved in production and retail. Yet while factors such as uncertainty following the Brexit vote and rising costs of ownership are currently subduing demand internally, the market continues to offer opportunities ...

## Casinos and Bingo - UK

“Casinos and bingo clubs are looking to external forces of regulation and technology as enablers of new formats and facilities that can reduce their reliance on the willingness to spend of their core customer base.”

## Commercial Banking and Finance - UK

“Banks must confront the challenges of digital structural change and redesign their operating models. By strategically connecting their businesses with the vast amount of data available to them, such as through the

Services being sought include more expert advice on child development and product suitability from parents eager to obtain ...

## Consumer Spending Priorities - China

“There are many grounds to believe continuous growth in consumer spending will take place in 2018, but businesses should not simply conclude that growth will be easy in every sector. When it comes to luxury indulgences, holidays and beauty services are going to catch more share of consumers’ discretionary spending ...

## Convenience Store Foodservice - US

Total c-store (convenience store) foodservice sales reached an estimated \$38 billion in 2017; while foodservice sales will grow, Mintel forecasts growth will occur at a slower rate relative to previous years. C-stores tend to have a loyal consumer base that drives most foodservice purchases. Though these consumers are important, operators ...

## Customer Journey for the Home - UK

“Some 13 million households bought furniture in the last twelve months and over half of these bought for the living room, while a similar number bought for bedrooms. They display a wide range of browsing and shopping habits, often gathering ideas online to shape their ideas and choices, then making ...

## Dairy Consumption Trends - China

“The dairy market as a whole is growing stably while different categories have very different performances. Cheese and yogurt are the winning categories, while milk, ice-cream and butter & yellow fats are performing less well by comparison. On the other hand, consumers have very different perceptions towards different dairy products ...

## Digital Trends (Consumer) - US

cloud, they can build intelligence on customers’ evolving needs, which can drive value.”

– Lewis Cone, B2B ...

## Consumers and the Economic Outlook - Quarterly Update - UK

“People are still wary about the potential impact of Brexit – particularly when it comes to the cost of living. But people seem able to separate these macro-economic concerns from their own personal financial situation. Unemployment remains at record lows, and while average wages are still increasingly more slowly than ...

## Convenience Stores - US

“Faced with declines in motor fuel rates, cigarette smokers, and carbonated soda drinkers in recent years, the convenience store (c-store) industry is in a state of change as it looks toward other product areas and innovations to drive sales. Leading retailers in the industry are focused first and foremost on ...

## Cycling - UK

“An uncertain macroeconomic environment is likely to affect mass-market demand among more ‘casual cyclists’. On the plus side, ‘cycling enthusiasts’ remain willing to spend on their hobby. Continual innovation in bicycle design and components, and new premium bicycles, including e-bikes, should help to sustain growth in market value.”

## Digital Marketing in Automotive - China

“30-39-year-olds, instead of young adults, show the highest interest in WeChat moment flow ads, especially those full-size SUV (Sports utility vehicles) and MPV (Multi-purpose vehicle) buyers. Therefore, car ads on this channel could highlight the large inner space, with a family theme to attract more attention.

Zhihu is now paid ...

## Dining Out - Canada

With ever expanding means of accessing the internet, ranging from skills on smart speakers to television apps to podcasts, brands face an increasingly daunting task of determining the best points of contact; adding to the difficulty of this task is the finding that the same demographic groups run above average ...

## Disposable Baby Products - US

"Declining birthrates and budget conscious parents have challenged growth in the disposable baby products market. Parents are unified in their views that safe product ingredients come first – or at least the safest option within their budget. Looking forward, parents' need for durable products is not expected to change, and ...

## European Retail Briefing - Europe

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

## Food Packaging Trends - UK

"The spotlight on plastic packaging and its environmental impact will be a key driver of change in the food industry. Consumers' expectations for sustainable packaging are set to heighten demand for alternative materials. Responding to the shifting demographic backdrop is also vital, given the growing number of small households and ...

## Gas Supply and Distribution - UK

"As competition in the energy retail market continues to heat up, suppliers are branching out into other utility services, such as broadband, and bundling their multi-utility offering to gain a competitive edge. The trend towards multi-utility brands is set to continue, with more suppliers offering diversified services to broaden their ...

## Health Food Retailing - UK

With just over half of the population either getting takeout or dining out, it can be said that Canadians are regulars at foodservice vendors. With young consumers having a hankering for non-traditional meal occasions, foodservice vendors are well positioned to increase traffic beyond dinner and lunches. While practical considerations of ...

## Domestic Travel - China

"Current robust growth of domestic travel market is contributed by more consumers, presumably those in lower tier cities, start to embrace travelling as a common leisure activity. The development of 'smart travel' enables domestic travellers to free from reliance on human tourist guides, and travel booking agencies could explore new ...

## Fleet Services - UK

"The fleet services market continued to expand over 2017, but the rate of growth narrowed somewhat as the industry navigated uncertainty in the business climate tied to Brexit. New vehicle registrations fell, though this was more symptomatic of pressure on the automotive industry, with fleet vehicles rising as a proportion ...

## Fruit and Vegetables - Ireland

"Increased interest in flexitarianism has helped to sustain fruit and vegetable sales as consumers attempt to improve their diets. Furthermore, the increased interest in provenance can be seen as over four in 10 consumers noted wanting more biographical information about farmers and growers on produce packaging."

– Brian O'Connor ...

## Hábitos de Consumo de Bebidas Alcoólicas - Brazil

"Enquanto a Copa do Mundo pode estimular o consumo da categoria, a preocupação com a saúde pode ser uma barreira. Para equilibrar esse cenário as marcas e categorias podem aproveitar o interesse em inovações demonstrado pelo consumidor brasileiro investindo em novos lançamentos e promovendo novas experiências. Para tanto é preciso ...

## Healthy Dining Trends - US

"The health food specialists have capitalised on the health and wellbeing trend but it hasn't been easy as supermarkets and online players have increasingly muscled in on the market. The most important factor for specialists is trust, both as a way to combat the threat of the competition but also ...

## Hispanic Beauty Consumer - US

Hispanics' expenditures growth on beauty products has come to a standstill. While the Hispanic market is young, which favors engagement, Hispanics also tend to be value oriented. The challenge for beauty brands is to transform the interest Hispanic women have in beauty trends into action. To do that, brands may ...

## Hybrid and Electric Vehicles - Canada

The market for hybrid and electric vehicles has seen strong growth over the course of the last several years, with consumer consideration and attitudes pointing to a positive outlook for the future of the category. Fuel economy, economical pricing and government incentives are key factors that play a role in ...

## Media Trends Spring - UK

"As YouTube attempts to tackle the issue of controversial content being uploaded to the network, its relationship with some of its key creators is becoming more strained. This may further open the door for Facebook to become a true rival to YouTube in the short online video sector."

## Mobile Phones - Canada

"As mobile technology becomes increasingly imperative to 21st century consumption, the mobile phone will be the control centre for consumers. The market is competitive among both software and hardware developers, and with a relatively short product lifecycle, there is ample opportunity for brands to win customers over. Looking forward, connectivity ...

## Mortgages - UK

"The mortgage market remains in a good state, but it is probable that the slower rate of growth achieved in 2017 is likely to be a sign of things to come over the next few

"Consumers are no longer satisfied by the basics when it comes to ordering a healthy dish at a restaurant; unique, flavor-driven dishes are becoming the norm. Highlighting ingredient quality gives even indulgent dishes, like pizza and burgers, a halo of health. Younger consumers are being impacted by this trend and ...

## Home Financing - US

"The majority of US consumers own their own home, but mistrust of the mortgage industry continues. Home ownership rates have held relatively steady over the past few years, and while younger consumers are less likely to own their living space, home ownership is still viewed as top personal and financial ...

## Marketing to Kids and Tweens - US

"In order to reach kids and tweens, marketers will likely have to consider strategies that include parents as decision makers, while at the same time appealing to kids. Gaining an understanding of the topics that kids are interested in, and areas where parents are supportive, can help guide brand strategy ...

## Menswear - UK

"The increased choice of retailers for men has made the menswear market much more competitive and made male shoppers more demanding and less brand loyal, meaning retailers need to do more to stand out and differentiate their offer."

## Mortgages - Ireland

"Although tight lending criteria and strict regulations are restricting access to mortgages for many consumers, there is a clear and discernible appetite among consumers for mortgages – not least because consumer confidence is high and interest rates are low for NI consumers and relatively low for RoI consumers."

– Brian ...

## Motor Insurance - UK

"Such strong growth in average motor insurance premiums appears to be unsustainable given upcoming changes to claims processes, meaning insurers will need

years. While mortgages are still in high demand, the challenges of Brexit uncertainty, squeezed household ...

## Nutrition and Performance Drinks - US

"Sales of nutrition and performance drinks held steady in 2017. Consumer interest in health and in products that provide functional benefits spelled gains in recent years. A relatively positive economic climate has allowed consumers to spend more on drinks that promise added value. A slowdown is seen in 2017 due ...

## Online Grocery Retailing - UK

"The smallest and quickest-growing aspect of the grocery market, online grocery is a sector that has seen a vast number of innovations in the past year as it strives to evolve to cater not just for big-basket supermarket-style shops but also for smaller top-up-based shops."

## Outdoor Power Equipment - US

"Despite outdoor power equipment being a large and costly purchase, adults are more likely to own equipment than rent. In addition, the time-saving benefits from hiring a professional service may create challenges for the market. Future growth may hinge on consumer interest in sustainability, emphasizing growth potential for eco-friendly power ...

## Purchasing Food and Drinks for Children - China

"As the concept of a balanced diet becomes popular, not all parents are interested in implementing strict rules on their child's diet. Giving in to children's requests and occasionally buying unhealthy treats is not always seen as a bad decision because some parents think that raising a happy, independent child ...

## Railway Engineering - UK

"Orders for new passenger trains are at a historically high level, with more than 6,000 carriages committed to

to look elsewhere for healthy margins. High potential distribution channels represent a chance to embrace changes in the way people drive, while brand is becoming more important in ...

## Online and Mobile Retailing - Ireland

"While the majority of Irish consumers find it easier to shop online via a standard website compared to a dedicated app, difficulties encountered during the checkout phase often lead consumers to abandon an online purchase. This indicates that there remains scope for retailers to further improve website navigation and payment ...

## Oral Hygiene - China

"Innovation in technology, product claims and packaging is driving both mature and newer product types such as electric toothbrushes and toothpaste for sensitive teeth, to continuously grow. Niche brands like Lion and Kao become more competitive and are posing challenges to big players by impressing consumers with good results." ...

## Property and Casualty Insurance - US

"The insurance industry is competitive, as most people make their insurance choices based on price. Although the industry is flush with technological innovation, consumer loyalty is yet to be significantly impacted by these developments. Because it is easier to attract new, young customers than it is to get older ones ...

## Rail Travel Worldwide - International

"Competition in passenger rail services is set to intensify in the coming years and decades. For decades, if not centuries, most of the world's rail companies have operated as state-run monopolies. Now this is changing as markets are being liberalised to allow new entrants, in a way similar to ...

## Salty Snacks - Brazil

"Brazil's salty snacks market has been growing in terms of value, but has been suffering consecutive falls in

between April 2014 and March 2021, according to the latest Long Term Passenger Rolling Stock Strategy. With a capital cost of more than £10 billion, around 50% of these new vehicles ...

## Salty Snacks - US

The nearly \$12 billion salty snacks market continues turn in a strong performance driven by the increasing prevalence of snacking. Meat snacks, popcorn, and cheese snacks are the category's three largest segments and are responsible for much of the growth. New flavors and varieties are key to continued growth, as ...

## Snacks Salgados - Brazil

“Apesar de ainda manter um crescimento positivo em termos de faturamento, quedas consecutivas no volume de vendas dos snacks salgados exigem da indústria ações que ajudem o setor a se adequar à maior exigência dos consumidores por saudabilidade, ao mesmo tempo em que tornam mais acessível o consumo de salgadinhos ...

## Suncare - Brazil

“Brazil’s suncare products market has been affected by the economic recession, with two consecutive years (2015 and 2016) of retail sales drop. The expectation is more optimistic for the next years, as sales should resume growth as the country’s economy improves. The market, however, still faces fierce competition from other ...

## The iGen Beauty Consumer - US

“The iGeneration is made up of four segments: tweens, younger teens, older teens, and adults. This diverse age range can be a challenge for brands as some iGens rely completely on their parents, while others have independent spending power. Regardless of age, iGens are generally more engaged and socially conscious ...

## Toilet and Hard Surface Care - UK

volume. Companies should adapt to consumers’ demand for healthier products, and at the same time offer more affordable options, especially in times of economic recession. The market also needs to be aware ...

## Schools, Universities and Hospitals - UK

“Universities are undergoing huge changes due to deregulation and the age of much of the estate, leading to a buoyant sector. Meanwhile, the government’s public expenditure strategy is curtailing investment in schools and the health sector, but is coming under increasing demographic and political pressure to relax restrictions.”

## Special Interest Holidays - UK

“Despite uncertain economic times in the UK there are plenty of opportunities for smaller specialist agents to leverage their expertise in niche markets. More than half of the UK adult population say they are interested in a dedicated special interest holiday. Younger people are looking for ways to discover new ...

## Technology and the Modern Traveller - Europe

“Technology has fundamentally changed the way modern travellers dream about, research and book travel. The advent of fast and reliable on-the-go Internet (3G and 4G mobile networks) has perhaps had the biggest impact – leading the way for a wealth of technological innovations that modern travellers increasingly take for granted ...

## The Leisure Outlook - Quarterly Update - UK

“Although participation in many leisure activities continues to grow there are areas of the market that may begin to struggle if consumers begin to increase their saving habits. There is a growing range of eating out venues so pubs and restaurants need to stay innovative.”

– Helen Fricker, Associate ...

## Travel Money - UK



“The toilet and hard surface care markets are at a crossroads, with brands seeking to arrest a long-term decline in value sales. The rise of multipurpose cleaners may have actually been bad news for brands in the long run, with consumers seeing them as commoditised and interchangeable. However, eco-friendly products ...

## UK Retail Briefing - UK

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

## Women's Haircare - UK

“Growth in the women’s haircare market has been driven by a continued focus on caring needs, especially driven by conditioning treatments. However, as mass brands develop their own versions of salon regimes, prestige brands will need to prove their worth to remain relevant. Regardless of price point, winning brands have ...

## 儿童产品零售 - China

“儿童产品零售市场虽然发展良好，但仍高度分散且竞争激烈。竞争重点已从产品品质转向服务品质的提升。家长欲获得有用资讯，因此寻求的服务已衍伸到更多的儿童身心发展及产品适用年龄段等专业建议。他们同时亟需儿童产品零售商提供更多的亲子设备（如游戏室、更衣室、洗手间等），也希望店内配备更多娱乐设施，且提供更多具有教育和健康益处的产品。对于已经深入低线城市甚至农村市场的线上零售商而言，此原则也同样适用。若能让服务品质追上产品品质，零售商势必能在拥挤不堪的市场里占有一席之地。”

## 口腔清洁 - China

“技术、产品宣称和包装创新都带动了成熟市场和以电动牙刷和抗过敏牙膏为代表的新型产品市场的持续发展；新型产品以电动牙刷和抗过敏牙膏为代表。狮王和花王等小众品牌的效果突出，竞争力与日俱增，为大品牌带来了挑战。”

“The travel money market continues to be driven by consumers’ desire to get the best exchange rate possible. Sterling’s struggles against the euro and the income squeeze caused by rising inflation at home mean travellers have even greater reason to demand the best rates for their foreign currencies.”

## Wedding Trends - China

“Although China is getting more tolerant of different ways of living, this is still a collectivistic society – valuing family cohesion and conformity. This means dating, wedding planning and marriage counselling businesses will not become sunset industries. In fact, young couples are more likely to share wedding-related tasks with each ...

## 乳制品消费趋势 - China

“乳制品市场整体稳健增长，其中不同品类表现各异。奶酪和酸奶品类的市场表现良好，而牛奶、冰淇淋和黄油则相形见绌。而且，消费者对不同乳制品的认知大相径庭，对奶酪的健康功效明显缺乏了解。乳制品市场大兴跨界创新之风，因为跨界创新产品并不会取代原有乳制品的市场地位，反而会巩固其发展。”

— 陈杨之，研究分析师

## 儿童食品饮料购买 - China

“由于均衡饮食观念变得更受欢迎，现在已不是所有家长都会要求孩子按照严格的饮食规定。屈服于孩子的要求并偶尔买些不健康的零食并不再是件坏事，因为有些家长认为孩子开心、独立且觉得自身的需求受尊重更为重要。”

— 马子淳，副总监

## 国内旅游 - China

“国内旅游市场当前的强劲增长归功于更多消费者（大概是低线城市消费者）开始将旅游当做一项常见的休闲活动。‘智能’旅游的发展让国内游游客不再依赖真人导游，而旅游预订中介也可以探索作为信息渠道的新机遇。”



## 婚庆趋势 - China

“尽管中国社会日益包容不同的生活方式，但仍是一个集体主义社会——即重视家庭的团结和统一。这意味着，婚恋、婚礼策划和婚姻咨询等行业不会成为夕阳产业。年轻夫妻其实更倾向于一起分担结婚相关的筹备工作，而非和父母一起筹划。”

— 马子淳，研究副总监

## 汽车市场中的数码营销 - China

“30-39岁的消费者比年轻消费者更喜欢微信朋友圈广告，其中全尺寸SUV和MPV的购买者尤其如此。因此，投放在微信朋友圈的汽车广告应突出大空间并采用家庭主题，以吸引更多关注。”

特别地，在20-29岁的消费者中，知乎比微信和微博受到更多关注。汽车品牌如果要和独立的汽车测评竞争，可以利用知乎平台树立值得信赖的品牌形象。使用受众的语言并且积极参与留言板块的讨论是应当被考虑的策略。”

— 过人，研究副总监

## 消费热点研究 - China

“众多因素支撑2018年消费者支出将继续增长的预期，但企业不应简单地总结为所有品类都能一帆风顺地高歌猛进。在奢侈享受方面，旅游度假和美容服务将分羹更多消费者自主性支出。但是，所有品牌都需要不断为其产品和服务注入新鲜活力，否者将容易被消费者视为枯燥乏味，打入‘冷宫’。”

— 徐如一，中国区研究总监