

April 2018

Added Value in Dairy Drinks, Milk and Cream - UK

“Animal welfare attracts strong consumer interest. Recent negative publicity around the dairy industry adds further urgency for high-welfare dairy systems to tangibly demonstrate their credentials to consumers. High-welfare products will also need a prominent positioning in-store to disrupt most people’s habitual approach to buying milk.”

– **Alice Baker, Research ...**

American Lifestyles: Markets in Motion - US

“After seeing that the divisive political climate did little to disrupt the economy in 2017, Americans seem ready to roll with the punches this year. The headlines may be highlighting the Russia investigation, potential tariffs, and talks with North Korea, but most Americans will be focused on the low unemployment ...

Automotive Retailing - Ireland

“Despite low levels of ownership in 2017, sales of Alternative-fuel Vehicles (AFVs) such as hybrids or electric cars continue to see year-on-year increases as Irish consumers become increasingly concerned with maximising fuel efficiency and minimising car running costs.”

Black Consumers and Convenience Stores - US

Convenience stores’ value among Black consumers is rooted primarily in the amount of time they are able to save in traveling to and from the store as well as the shopping experience itself. Black men are the main c-store shoppers and they use these outlets as one-stop shopping locations, mostly ...

British Lifestyles: Reinvigorating Brand Britain - UK

“The UK’s simmering identity crisis has significant commercial implications, particularly for brands that

Airlines - US

The airline industry has enjoyed a period of record profitability, mostly due to low fuel costs and an economy and culture that enables and promotes air travel. However, market factors are starting to turn against airlines, and they will have to adapt and innovate to satisfy the demands of a ...

Attitudes towards Prestige Facial Skincare Products - China

“Seeking better results is the key motivator that drives consumers to use prestige brands, highlighting it being the core area to develop and communicate. Especially given that consumers are offered more options to struggle with when pursuing effectiveness – trade up to premium products or seek help from advanced technology ...

Betting Shops - UK

“The 2018 FIFA World Cup will not shield betting shops from the full impact of an imminent gaming machine stake cut, but it can help shore up the sporting side of the business.”

– **David Walmsley, Senior Leisure Analyst**

Bread - Ireland

“Sliced white loaves and pancakes are the main types of pre-packaged bread products bought by Irish consumers but pre-packaged wholemeal bread is gaining in popularity as increasingly health-conscious consumers are turning to ‘better-for-you’ products as they look to improve their diets and overall health and wellbeing.”

Burger Trends - US

Burgers are menu and consumer favorites and competition emerges from all angles; both burger-specific operators and restaurants that menu them are using more than price promotions to capture more

have come to leverage their British identity as a way of appealing to both domestic and foreign audiences. For these brands, relying on traditional conceptions of Britishness may no longer carry the same influence that it once ...

Canadian Lifestyles: Redefining the Mainstream - Canada

“Not only are consumers currently feeling better about their financial situations this year, the majority of Canadians also feel that their financial goals are attainable. Even though there isn’t necessarily a Canadian version of the ‘American Dream’, there is a sense of optimism that exists amongst consumers. Optimism is also ...

Charitable Giving - UK

“2018 heralds a new era for the third sector. Not only do charitable organisations need to adjust to the rules and regulations of the GDPR, which will influence how they engage with future and existing donors, but the scandal surrounding Oxfam threatens to undermine public confidence in charitable giving.

It ...

Condiments and Seasonings - Canada

While consumers’ tastes are evolving, familiarity remains the most important consideration for Canadians when deciding on what condiments and/or seasonings to use. This represents a potential challenge for companies that operate in the category. Is there room to innovate and yield a return on investments that are made when ...

Consumers and Financial Management - UK

“Open Banking is on the cusp of full implementation, and the financial management landscape feels ripe for a shake-up. That said, many are still comfortable using spreadsheets or paper-based methods, while financial confidence is being undermined by a lack of formal financial education. Providers can step in to provide support ...

burger business. Consumers indicate a willingness to pay more for burgers made with premium ingredients as operators increasingly innovate with crowd-pleasing ...

Carbonated Soft Drinks - US

The mature \$36.2 billion CSD (carbonated soft drink) market faces competition from RTD (ready to drink) coffees, energy drinks, sparkling waters, and BFY (better-for-you) options. Growth opportunities lie in targeting the occasions when CSDs offer unique benefits and focusing on functional and aspirational qualities that set these apart from ...

Chocolate Confectionery - US

Dollar sales of chocolate confectionery continue to grow at a modest pace, driven by the nearly universal penetration and the belief that chocolate is a permissible indulgence. While purchasers are creatures of habit when choosing chocolate, they are also open to new flavors and varieties and willing to pay more ...

Construction - UK

“The construction market has a reputation for being highly cyclical, and the prospect of a Brexit-induced economic slowdown suggested difficulties ahead. However, the sector covers a wide range of markets and some are very buoyant, highlighting increasingly polarised activity.”

– Terry Leggett Senior B2B Analyst

Consumers and the Economic Outlook - US

“The US economy weathered the political tumult of 2017 with surprising vigor, as most major economic indicators fared increasingly better throughout the year. The nation’s GDP (gross domestic product) has been on the rise for 17 consecutive quarters, and consumer confidence has been marching forward at record levels, while unemployment ...

Convenience Stores - UK

“Growth in the convenience sector accelerated for the third consecutive year, in part driven by inflation. However, it was the structural changes, both through acquisitions and failures, which made it a defining year for the sector. The increased power of the multiples in the market is likely to be both ...

Cuidados com o Cabelo - Brazil

“O mercado de cuidados com o cabelo no Brasil está em constante inovação. Novas tendências, como produtos naturais, orgânicos e veganos e produtos para cabelos cacheados, crespos e afro, novas técnicas de lavagens, como o no-poo/low-poo, e extensões de linha, com pós-xampus, pré-xampus e condicionadores de limpeza, têm ...

Department Stores - France

“The French department stores are heavily reliant on their Parisian flagship stores and on tourists. As a result they were hit hard by the downturn in foreign visitors that followed the terrorist attacks in Paris (November 2015) and Nice (June 2016). The format is much less important to retailing than ...

Department Stores - Italy

“The department store sector in Italy saw weak growth in 2017 as both Coin and Rinascente are losing share of spending to specialist retailers. Both department stores need to broaden their appeal to attract less affluent and younger consumers. While the Italian online market is still underdeveloped, as e-commerce grows in ...

Department Stores - UK

“The UK department store sector remains challenging, with a number of the leading players struggling to carve out their niche in a crowded retail market. Innovation has been centred on creating a compelling in-store environment and whilst this is important, research suggests that department store retailers should be doing more ...

Drinks Packaging Trends - UK

Cough, Cold, Flu and Allergy Remedies - US

Total sales for the cough, cold, flu, and allergy remedy market reached \$9.5 billion in 2017, a 6.2% increase from 2016. The start to a record-breaking flu season has already driven an 8.7% increase in the cold and sinus remedies segment, fueled by sales of flagship, multi-functional ...

Department Stores - Europe

“There is enormous variation between countries in the development of department stores. At one extreme there is Spain, where the only department stores is the country's leading non-food retailer. At the other extreme there are countries like Austria, where the sector scarcely exists. Italy has a couple of high profile ...

Department Stores - Germany

“There are signs of the beginnings of a recovery in the German department stores sector. New ownership and a more focussed management now shorn of too many diversifications are a good start. The consumer research for this report shows that the stores are still valued for many of the things ...

Department Stores - Spain

“As the only department store in Spain, El Corte Inglés is facing growing competition from more agile and lower-priced specialist retailers. In order to compete El Corte Inglés needs to broaden its appeal and move away from a reliance on older and wealthier customers. It also needs to stand out ...

Digital Trends Quarterly: AI and Automation - UK

“The fact that digital assistants like Alexa or Siri are the most likely of the AI-based or automated products or services that people would use is a reflection of the extent to which voice controlled speakers like Amazon Echo and Google Home have quickly captured the public's imagination. Smartphone-based digital ...

European Retail Briefing - Europe

“The spotlight on plastic packaging and the environment is already driving change in the drinks market, while health concerns present a challenge and an opportunity. Consumer openness to using a deposit return scheme bodes well for its implementation, meanwhile, portion control packaging and nutrition labelling can appeal, helping consumers to ...

Facial Masks - China

“Male consumers will be a new growth point for the facial mask market. Brands encouraging usage frequency is the main driver of market growth. The future market is about product innovation and ingredient education, while paying attention to the causation of skin problems such as air pollution.”

– Vicky ...

Fermented Soft Drinks - China

“The growing awareness of healthy diet from consumers, together with the motivation for innovation to drive the business from manufacturers, has contributed to the rise of fermented soft drinks, which have the potential to become a main sector in China’s drinks market.”

France Outbound - France

“France ranks as the fifth-largest outbound market in expenditure terms, reports the UNWTO. Despite a marginal decline in outbound trips in 2016, tourism expenditure increased in 2016 – a positive sign for the outbound market. French tourists may be taking fewer trips but they are choosing to invest more in ...

Hair Colourants - UK

“The future growth of the colourants market may be limited as the relevance of the market changes. Rather than appealing to older consumers through affordability, appealing to younger consumers is increasingly important. Providing accompanying haircare and gradual or personalised colour solutions are key to brand success, as well as embracing ...

Hand, Body and Footcare - UK

This month's European Retail Briefing includes:

Feminine Hygiene and Sanitary Protection Products - US

“The feminine care market is moving further towards a competitive imbalance, with P&G becoming more dominant and private label encroaching on the position of smaller players. A rapidly aging consumer base makes growth a challenge; but there are opportunities. Natural products, improving consumer brand involvement, and durable sanitary protection suggest ...

Festive Foods - China

“The essential of festive foods isn’t about putting the products in a festival-themed package, but the intrinsic connection with festivals. It is these connections that drive consumers’ consumption and gifting of festive foods during festivals. Innovations around flavours, packaging and formula are necessary, but brands shouldn’t forget to enhance the ...

Grains and Rice - US

“The market for rice is considerable, standing at \$2.5 billion, but has stagnated in recent years. Consumer interest in a wide range of cuisines featuring rice as a component should lead to growth in coming years, but the category may also benefit from leveraging healthier attributes, potentially from rice ...

Haircare - Brazil

“The Brazilian haircare market is constantly innovating. New trends, such as natural, organic, and vegan products, as well as options for different hair types, such as curly and Afro-textured; new washing techniques, such as no-poo/low-poo; and line extensions, such as post-shampoos, pre-shampoos, and cleansing conditioners have impacted consumption and ...

Hispanics and Convenience Stores - US

"The hand, body and footcare category showed modest growth in value in 2017, with the value of the premium segment growing at a greater rate than mass-market. Whilst the majority of people show an understanding of body skin being as important as facial skin, consumers are blurring the boundaries when ...

Hotels in Eastern Europe - Europe

"Given some strong recent performance, a distinct lack of supply and a favourable economic backdrop, the attention of hotel investors and the major international chains is shifting towards Eastern Europe, which now offers greater growth potential than the currently 'hot' markets of Western Europe, such as Ireland, the UK, the ...

Hybrid and Electric Cars - US

"Vehicle fuel economy is a top concern for Americans and their automobiles. Americans have seen gas prices go over \$3.50 as recently as 2014, so many remember the pain of filling up a gas tank at those prices. Consumers are also increasingly aware of their environmental impact, and seek ...

Ice Cream and Dessert Shops - China

"China's ice cream and dessert shop market has enjoyed robust growth in the last five years, helped by the growth of new and more specialised brands; however, there's still room for more niche products, such as frozen yogurt. As consumers are craving unique and fun experiences, exploring interactive experiences, such ...

Lunchtime Preferences - Ireland

"The Irish foodservice market is driven by the rising popularity of grab-and-go food options as time-poor consumers seek convenience, it is also being shaped by consumer demand for natural ingredients, vegetables, fruits, superfoods and healthy meals. Consumers enjoy buying lunches to eat out on everyday occasions and for leisure alike ...

Marketing to Young Adults - Canada

"The convenience store (c-store) category is facing headwinds affected by lower margins due to an increasingly competitive retail landscape and declines in motor fuel prices over the past few years. As the category aims to find its own identity – one that may go beyond just convenience – it can't ...

How Consumers Discover Products Online - US

Online sales growth is continuing to outpace overall retail sales growth in the US, as consumers spend more time online and subsequently become more accustomed to shopping online. This report will focus on how consumers are finding products, including a closer look at food and drink products and beauty products ...

Ice Cream - Brazil

"After years of decline, the ice cream market should grow again in 2018, so brands need to be prepared to meet consumers' demands, which have changed. In order to do so, brands can invest in unique textures and flavors that add value to products and help improve customer loyalty, as ...

Ice Cream and Frozen Novelties - US

"While consumers strive to live healthier lifestyles, strong engagement in the category suggests that there is still room for indulgence. Yet, the ice cream and frozen novelties category attained modest dollar sales growth from 2016-17 while unit volume slowed, indicating that increased consumption frequency is critical to growing the category ...

Major Domestic Appliances - UK

"The market for major domestic appliances has continued to grow, but at a slower rate than previous years. The replacement market remains resilient, but replacement purchases can occur unexpectedly leading consumers to prioritise price and speed of replacement, rather than taking the time to research and upgrade to the latest ...

Men's Clothing - US

"The young adult demographic is a unique group of consumers who present a potentially long-term benefit for brands. They are transitioning from childhood to adulthood, while planning out their career and life goals. The opportunity for brands is to establish a relationship with these consumers that they can continue as ...

Mobile Phones - UK

"The trend towards full-screen displays and larger screens has seen prices for flagship smartphones grow considerably, motivating many people to keep their smartphones longer. With extended battery life a priority for consumers, incremental updates and minor innovations are proving insufficient in driving regular upgrades. A large proportion of people are ...

Mother and Baby Products Retailing - China

"Birth rates are low, and the number of childbearing age mothers continues to decrease. Yet the mother & baby products market continues to grow well, thanks to parents spending more, per capita, on their babies as they seek better quality, safer products. Slowing growth is driving ever-increasing competition in the ...

New Energy Cars - China

// // “The core buyers of EVs (electric vehicles) have been skewing from 40-49-year-olds to 30-39-year-olds with high household incomes, suggesting the core car buyers in China are gradually picking up a more welcoming attitude towards such vehicles.
25-29-year-olds, especially males, continue to have concerns ...

Package vs Independent Holidays - UK

"Mintel's research shows that those who book 'pure packages' are the most likely travellers to record high customer satisfaction levels. Convenience and the removal of travel stress are key selling-points for package brands."

—John Worthington, Senior Analyst

"Men have endless options as to where they can shop, which might only lead to more decision-making issues. Since most men are strategic shoppers, many are likely choosing to buy clothes wherever makes the most sense, whether motivated by price or convenience or ability to fulfill other shopping needs, either ...

Mortgage Advice - UK

"Consumer interest in online advice is positive, but many are unsure whether it can completely replace speaking to an adviser face-to-face. Advisers looking to launch online advice services would benefit from continuing to offer consumers choice in how they complete the advice process, such as being able to arrange a ...

Music and Other Audio - CDs, Streaming, Downloads & Podcasts - UK

"The introduction of voice-controlled smart speakers, such as the Amazon Echo, has been a very exciting development for audio markets. As the popularity of the device grows it can significantly impact how, when and which content people are listening to. Streaming services are now competing to best understand how to ...

On-premise Alcohol Trends - US

Sales of alcohol on-premise are rising year-over-year thanks to consumers' interest in premium alcoholic beverages. While the market is growing, competition among bars/restaurants has never been stronger. Foodservice establishments must contend with consumers' preference for drinking at home and must prepare for the next generation of on-premise consumers. Establishments ...

Potable Water and Sewerage - UK

"For the current asset management period AMP6, running from 2015 to 2020, Ofwat has introduced a move towards total expenditure (totex), combining capital and operational expenditure. Ofwat believes this will remove a bias toward capital programmes as capital expenditure has often been preferred over operational expenditure in delivery solutions due ...

Residential Flooring - US

"The residential flooring market has grown thanks to a strong housing market and product innovations in function and design. Challenges are greatest for carpeting, which faces stiff competition from innovative, easy to maintain hard surfaces. While growth opportunities lie with ongoing outreach to younger consumers, parents, and Hispanics, challenges lie ...

Security Equipment, Access Control and CCTV - UK

"The security equipment market grew in 2017 as it maintained momentum despite the air of uncertainty surrounding Brexit. Ongoing growth has been underpinned by technological advancements, particularly the integration of equipment, and a surge in cheaper and DIY security systems. A significant rise in core areas of criminality, especially burglary ...

Snack, Nutrition and Performance Bars - US

Dollar sales of snack, nutrition, and performance bars saw steady year-over-year growth from 2012-17 (+20% overall). 2017 represents a slight slowdown, with an estimated 2.6% increase over 2016 (0.1% when adjusted for inflation). While consumer interest in snacking, protein, and functional foods positively impacts the category, a growing ...

Social Media Trends - US

This Report covers trends in social media, inclusive of which services carry the greatest engagement with users and the types of content shared and consumed, including influencer marketing, ads, and coupons. Other topics explored in the Report include the use of social media for product research and discovery, and the ...

Sweet Biscuits and Snack Bars - UK

"Both more indulgent features, such as a thick covering of chocolate and indulgent fillings, and naturally healthy ingredients, are of strong interest to eaters of sweet biscuits. Tailoring NPD to both these demands is needed

Seasonal Shopping (Autumn/Winter) - UK

"Despite economic uncertainty clouding the retail sector in 2017, autumn events remained popular, with back-to-school in particular performing strongly. While Halloween and Bonfire Night are both popular for families, they remain relatively small and have failed to truly impact retail sales over the autumn months. Retailers will need to focus ...

Shampoo, Conditioner and Hairstyling Products - US

"The shampoo, conditioner, and hairstyling products market continues to post slow but steady growth, driven by gains in the shampoo segment and a stabilizing conditioner segment, buffering struggling sales of hairspray and hairstyling products. Damage concerns and preferences for natural hair looks have some consumers skipping daily washing in lieu ...

Social and Media Networks - UK

"While there is a trend towards cutting down on social media use, more people than ever are using social networks and the vast majority are sharing content. Platforms more popular with younger demographics must strike a balance between maintaining a cool brand image and continuing to cater for long-term users ...

Sorvetes - Brazil

"Depois de anos seguidos de queda do mercado, a categoria de sorvetes pode voltar a crescer em 2018. Diante desse cenário, é importante que as marcas estejam preparadas para atender às exigências do consumidor, que já não é o mesmo de quando a categoria estava em crescimento."

— Ana ...

The Chinese Consumer - China

"Thanks to a more solid performance in China's economy in 2017, consumer sentiment is starting to move away slightly from the prudence and caution seen in the same time last year. However, consumers are unlikely to change their habit of spending in a smart way. Value for money will continue ...

to maximise the number of usage occasions for biscuits.
Limiting the amount of sweet biscuits ...

The Experiential Traveler - US

The experiential traveler is one who seeks authentic experiences and is willing to dig deeper into a culture/location, often stepping outside the expected to move beyond his or her comfort zone. The experiential traveler also desires a truly immersive experience – whether through accommodations, dining experiences, or activities – ...

The Savvy Food Shopper - UK

“A savvy shopping mentality is firmly ingrained among UK consumers when it comes to their grocery purchases. That this is underpinned by emotions as well as by monetary gains, signals continuing longevity.

However, there are plentiful opportunities for brands and retailers to connect with the savvy shopper beyond promotions. Positioning ...

UK Retail Briefing - UK

This month's UK Retail briefing includes:

中国消费者 - China

“在2017年中国经济表现更加稳健的强心剂作用下，不同于去年同期，消费者的谨慎态度开始略微放松。不过，他们不太可能改变其精明的消费习惯。性价比仍将是消费者购物时的首要考虑因素。这与低价关联不大，而是更重要的，不能让消费者感觉被坑。如同价格昂贵和独家专属不再是豪华品牌的标准，花哨但不走心的营销也不能像投资更卓越的产品和服务一样有效地赢得客户青睐。

消费者更看重工作满意度，以及保护隐私。民族自豪感也在上升：他们不仅对中国品牌更有信心，愿意为此买单，而且也在呼吁传统文化和传承的回归。这为品牌创造了自我推广，吸引当今中国消费者的新机会。”

发酵软饮料 - China

“消费者健康饮食意识不断提高，生产商坚持创新以求发展。受这两方面的影响，发酵软饮料市场呈上行之势，有

The Insurance Purchase Decision - Canada

“As insurance distribution channels evolve, direct digital sales are bound to increase, resulting in more pressure on brokers to provide value-added advice and claims help.”

Theme Park Vacations - US

"Driven by an excited core audience willing to pay for admissions prices and beyond, theme parks are expected to grow significantly in the coming years. Still, theme park vacations face stiff competition from other vacation types. Theme parks can work to differentiate themselves by focusing on what sets them apart ...

UK Retail Rankings - UK

The retail sector appears to be in turmoil. There has been an unprecedented number of failures or retailers reported to be in trouble just in the first quarter of 2018. It would be easy to go on to say that the whole retail sector, and particularly the store-based ...

冰淇淋和甜品店 - China

“得益于新品牌和单品店品牌的不断发展，中国冰淇淋和甜品店市场在过去5年内增长稳健。但酸奶冰淇淋等较小众产品仍有市场发展潜力。消费者渴求独特有趣的体验，因此品牌可尝试举办一些互动活动（如DIY体验）来吸引消费者参与。”

— 陈杨之，研究分析师

对高端面部护肤品的态度 - China

"想要‘达到更好的功效’是驱动消费者使用高端品牌的主要原因，显示出这一点应该为品牌发展、沟通的核心。特

望成为中国饮料市场的一大品类。”

— 李梦，研究副总监，食品与饮料

新能源汽车 - China

“新能源车的核心购买者从40-49岁转向家庭收入高的30-39岁的群体，说明中国的主力购车群体开始逐渐接纳这一车型。25-29岁的消费者（尤其是男性）对这一车型仍有顾虑，比如担心其安全性。好消息是，他们相信新能源汽车将成为未来主流车型。目前他们似乎只是‘精神上的支持者’，但当市场上出现更多令其放心的车型后，他们会转变为真正的购买者。”

— 过人，研究副总监

节庆食品 - China

“节庆食品的重要性与食品是否有节庆主题的外包装无关，而是食品与节庆之间最根本的关联。正是这些关联驱策消费者在节庆期间自用或赠送节庆食品。虽然在口味、包装、配方等层面上有创新的必要，但品牌仍不该忘失其产品需更能彰显各个节庆所代表的社会价值与意涵。”

别是当今消费者眼前有更多选项可以达到有效的成果——她们可以付出高价购买高端产品，也可以寻求美容仪器等先进技术的协助。”

— 金乔颖，研究副总监

母婴产品零售 - China

“出生率低，且育龄期女性数量持续下降。不过，由于父母为孩子寻求更高质、更安全的产品，人均消费增多，母婴产品市场持续增长。发展放缓导致市场竞争日益激烈，更多零售商在这一分散的市场争夺份额。想获得成功，零售商不仅须让家长相信他们有种类多样、质美价优的产品，还要为父母提供更高质的服务。英敏特调查结果显示父母希望零售商注重服务质量，提供更好的育儿咨询服务和高品质产品，门店吸引人且具备良好设施。这将要求零售商加强客户服务并提供值得信赖的专业育儿知识。”

— 郭马修，亚太趋势总监

面膜 - China

“男性消费者将成为面膜市场新增长点。品牌拉升使用频率为市场增长的主要驱动力。未来市场的发展关键在于产品创新及成分教育，同时还需关注空气污染等造成肌肤问题的元凶。”

— 周文棋，研究分析师