

**April 2023**

## **Age Management Products - China**

“Consumers are adopting a variety of solutions to deal with ageing, but facial skincare products remain the most mainstream cure without much cannibalisation from the usage of beauty devices and beauty supplements. Still, upgrading on effective and non-irritating ingredients to cater to different skin conditions and innovations on product format ...

## **Attitudes Towards Skin Tone Management Products - China**

“Despite tightened regulation of whitening efficacy claims, skin tone management will still be an extremely important functional pillar among all, given consumers’ strong need and diverse ways of problem-solving. On the other hand, as competition around ingredients and efficacies intensifies in the facial skincare sector, brands will need to seek ...

## **Baby Durables - US**

“Baby durables products are essential, but the category has faced slow growth amid low birth rates in recent years. While economic pressures will bring an increased focus on value, parents continue to prioritize safety, quality and durability. Establishing trust will be critical as parents look to brands to provide guidance ...

## **Baking and Mixes - US**

“Despite inflation keeping many consumers turning to their own kitchens for meal solutions, the regularity of home baking is on the decline. Tired consumers are seeking convenience options, including the use of mixes and prepared offerings. Value messaging will continue to resonate but must stretch beyond low price to include ...

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

“There being such a wide array of reasons for people to buy cakes and sweet baked goods will continue to support sales. The category faces intense competition

## **Attitudes towards Gluten-/Wheat-Free Food - UK**

“The income squeeze is putting considerable pressure on the gluten-/wheat-free market, exacerbated by these products’ higher price than their standard equivalents’. Prioritisation of gluten-/wheat-free treats over essentials if money was tight and interest in brand collaborations point to opportunities to keep people engaged. Meanwhile, making sustainable ingredients more ...

## **Attitudes towards Sustainability - China**

“Consumers have now reached a consensus to pay a premium for products that claim to be sustainable, but with higher requirements regarding what would constitute a truly sustainable product. Brands would need to provide more sustainable options throughout the entire product life cycle in order to convince consumers and justify ...

## **Baby Food and Drink - UK**

“Ongoing pressure on household incomes over 2023-24 will continue to erode volume sales of manufactured baby food by favouring scratch cooking. Promoting their products as components in home-cooked meals, offering recipes and further NPD in short-cut cooking products should allow brands to tap into the home-cooking trend and to drive ...

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

“Brands with a loyal set of consumers are well positioned as purchase patterns change during the cost-of-living crisis. Value perceptions will be important during periods where consumers look to alternative products, however price is not the only factor that consumers take into account when considering what to purchase. Health and ...

## **Camping and Caravanning - UK**

“The core strength of camping and caravanning will remain its inclusive appeal to a wide range of budgets, which will help the market withstand periods of economic uncertainty. The biggest long-term growth

though from other treats, making NPD important. New flavour twists and more chocolate-branded or café/bakery branded products will appeal as ways to ...

## **Car Purchasing - UK**

“Car purchases stumbled during 2022 as the impact of cost of living pressures affected consumer demand. While the situation is expected to improve during 2023, sellers will still be dealing with a largely cautious customer base. Used cars will be preferred to new with many buyers likely to delay their ...

## **Circular Shopping - US**

“Circular shopping options are becoming increasingly attractive due to their financial and environmental benefits. Additionally, perceptions around ownership are shifting – with more and more consumers looking for flexibility and the stigma of buying secondhand decreasing. But it's not just about practicality – consumers are also drawn to these ...

## **Consumer Banking Experience - Canada**

“The big five banks continue to dominate the consumer banking landscape in Canada as they continue to leverage their strengths in the form of high trust levels, brand reputation and branch networks to become trusted financial partners of Canadians. Interest in digital banking features is high, but strong branch relationships ...

## **Convenience Stores - UK**

“The perceived price-premium of in-home food and drink through convenience stores presented barriers to the sector in 2022 and will continue to do so in the short term. However, the sector has an opportunity to offset the decline in-home demand with great value for money for on-the-go and meal for ...

## **Cruises - UK**

“The cruise industry will benefit from the growing number of over-55s living in the UK, particularly as they are in a relatively good financial position and have high budgets for cruising. The rising number of new ships

opportunities lie in rising demand for premium static rentals, multi-destination touring trips, and an ever-diversifying range of glamping ...

## **Cheese - Ireland**

“Despite the stressful events of recent years, the popularity of cheese has persevered as the market has remained accessible and affordable to consumers, regardless of their financial situation. The past year has seen opportunities for private label retailers to grow and improve the value of their products, which has resulted ...

## **Condiments and Dressings - UK**

“The market will continue to be supported by the ongoing demand for homemade meals in 2023, with the shift towards foodservice and prepared products posing a threat later in the period. The success of NPD and marketing in aligning the market with the long-term trends in the nation's eating habits ...

## **Consumers and the Metaverse - UK**

“The hype surrounding the metaverse has seemingly peaked, with technological limitations and cost pressures dampening excitement. Consumer awareness of metaverses remains low, with minimal numbers accessing metaverse platforms. For brands, the challenge is how to ignite experiences within metaverses that go beyond consumers' habitual use of other digital channels, such ...

## **Critical Illness Cover - UK**

“The mid-to-longer term prospects for the critical illness cover market are more favourable than the near-term ones. Over the next year, new sales are likely to remain flat, due to a weaker housing market and the ongoing effects of the rise in the cost of living on household budgets. However ...

## **Domestic vs Overseas Tourism - Ireland**

“Trips taken by Irish consumers have increased between 2021 and 2022 as consumers become less concerned

coming to the market should help to appeal to a wider audience, however ...

## Electric and Hybrid Cars - China

“With the increase of NEVs’ penetration, positive word of mouth from NEV owners drove consumers’ recognition of NEVs’ product power. The survey results show that the satisfaction rate in terms of driving, riding comfort and charging mileage exceeded 70%, indicating that NEVs can meet the daily use needs of most ...

## Exercise Trends - UK

“The relative affluence of the exercise market’s core participation base is insulating it against the worst of the cost-of-living crisis but the activity of less well-off groups has not yet recovered from the COVID-19 pandemic and is now threatened again by rising costs and falling public facility provision.”

## Feminine Hygiene and Sanitary Protection Products - US

“Consumers are increasingly viewing their bodies as interconnected ecosystems, driving focus on less-recognized areas of health, including vaginal health. Overall, feminine care needs are essential to women’s health, yet consumers’ expectations are no longer purely functional. The category is in a moment of evolution, as lines blur between beauty and ...

## Footwear Retailing - UK

“While fashion has struggled during the tough economic climate, footwear has fared slightly better, and is poised for growth. Comfort and casual styles remain key drivers within the category, with casual fashion and athleisure giving yet more rise to trainers and casual everyday footwear. Consumers look for more from the ...

## Gaming Trends - Canada

“Gaming is a mainstream hobby in Canada, and as more consumers engage, they expect more out of the industry.

with COVID-19, however the onset of the cost of living crisis has arrested recovery of the sector somewhat.”

– **Brian O’Connor, Category Director for Ireland**

## Ethnic Restaurants and Takeaways - UK

“Higher consumer confidence about dining in at restaurants since the pandemic has resulted in some consumers using takeaway services less often. However, ethnic foodservice sales have become more hard-earned than before, as operators are challenged to offer competitive deals and promotions whilst battling rising costs. Promisingly, consumers continue to be ...

## Facial Masks - China

“To trigger trials for facial masks, brands need to deliver a good story around the skin sensation of their products, either by leveraging product texture and sheet materials or by developing innovative product formats. Moreover, sensitive skin consumers demonstrate great potential in the facial mask category. Brands must consider their ...

## Food & Beverage Retailing - Brazil

“With more frequent visits and smaller purchases, retailers need to adapt to accommodate a larger number of customers and create a pleasant and practical environment, so consumers don’t spend too much time inside the store. Consumers show interest in the use of technology, as well as in retailers that offer ...

## Functional Drinks - US

“Functional drinks are a rapidly evolving space, challenging brands to keep pace with emerging trends without losing sight of the basics. In any case, flavor serves as an introduction; working backwards to connect related ingredients to micronutrients and their broader functions can satisfy thirst, with science-backed wellness to justify whim ...

## Hábitos de Consumo de Bebidas Não-Alcoólicas - Brazil

As Canadian demographics shift, the majority of gamers are expecting developers to adapt and adopt diversity, equity and inclusion so that they can see themselves reflected in the games they play ...

“Há espaço para a categoria de bebidas não alcoólicas explorarem os principais benefícios que interessam ao consumidor, como hidratação, energia e melhora do humor, podendo aumentar a atratividade e a frequência de consumo de todas as categorias”

– **Laura Menegon, analista Alimentos & Bebidas - Latam**

## Income Protection - UK

“The income protection market has generally benefitted from the pandemic-induced focus on health and financial resilience, with new premiums and contracts growing substantially in 2022. However, longstanding challenges in the market remain, in particular targeting traditionally underserved groups. Product development should continue to focus on health and wellbeing incentives as ...

## Instant Foods - China

“The fading of the pandemic has slowed down the growth of the instant food sector. Faced with increasing internal and external competition, brands need to showcase unique selling points by upgrading the taste and nutrition of products to attract consumers who are more price-sensitive after the pandemic.”

## Juice and Juice Drinks - China

“Under the inevitable trend of premiumisation in the juice market, brands that justify their value and resonate with ever cautious spending consumers will be recognised. Positioning fruit and vegetable juice as a tool to achieve complete nutrition can boost usage frequency due to nutritional deficiency and attention to healthy eating ...

## Leisure Trends - Canada

“Leisure behaviours are evolving; digital tech is making media a more central part of leisure time while also making it easier to enjoy leisurely activities during work time.

Meanwhile, market factors are driving a shift from out-of-home to in-home leisure time – creating a major threat for the former and ...

## Lodging - US

"Accommodations are back! Industry revenue and profits have recovered despite only domestic leisure travel fully getting back to pre-pandemic levels. Still, properties will need to increase their occupancy, and they'll have to entice a travel population focused on value, ease and control."

## Managing Common Illness - US

“Consumers have faced increased exposure to common illness over the past year, as influenza, COVID-19 and RSV converged, creating a tridemic. Nearly one quarter of consumers experienced more frequent common illness than last year despite taking preventative measures, such as using immune-boosting supplements. Because many symptoms of common illness overlap ...

## Marketing to Adults without Children - UK

“Adults without children are a growing and increasingly important consumer group that brands need to understand and service. As the number of reasons to not have children arguably increases, from the steep rise in the cost of living to the impending climate crisis, more adults are choosing to delay parenthood ...

## Marketing to Gen Z - China

“Gen Zers are doing both addition and subtraction to find balance in life, instead of ‘wanting it all’. On the one hand, they long for more high-quality experience and enriched social network and interactions, while on the other hand, they seek solutions to free themselves from unimportant things, invalid socialisation ...

## Marketing to Young Families - China

“The attitudes of young parents towards childcare have changed remarkably. They increasingly focus on the role of 'companionship' in the development of their children. As the need to reduce children's study load becomes clearer, the protection of children's childlike innocence and creativity is becoming a more important issue ...

## Menu Insights - Tea Houses - China

“We still see fast growth in tea houses, however, brands should start to pursue consumer loyalty rather than rapid growth. Brand value can be better delivered by incorporating traditional and local touches. Differentiation can be established through different tea bases and milk bases. At the same time, self-expressive elements are ...

## Money Management Apps - UK

“Younger consumers are using more financial apps, more frequently and for a wider range of purposes. The cost of living crisis could see use increase across demographics as people look to budgeting tools and Open Banking apps to help highlight opportunities for savings. Financial services markets that have struggled to ...

## Non-alcoholic Drinks Consumption Habits - Brazil

“There is scope for the non-alcoholic beverage category to explore key benefits that matter to consumers, such as hydration, energy and mood enhancement, potentially increasing the attractiveness and frequency of consumption of all categories.”

– **Laura Menegon, Food and Drink Analyst – Latam**

## Payment Preferences - US

“The past couple of years have seen a rare reversal in trends within payment preferences, with credit cards declining as a top choice and cash climbing back upward. Recent economic developments have had a significant impact on the payments space, with the

## Meal Planning & Preparation - Canada

“By and large, Canadians like the idea of cooking. For many, it provides a sense of satisfaction and even stress relief. Many also feel more confident in the kitchen following the pandemic. The evolution in meal preparation moving forward is likely to be influenced by generational shifts with today's younger ...

## Mobile Network Providers - US

“With smartphones in virtually every pocket, amping up growth can be challenging in the mobile space. Yet the seemingly static sector still has lots of opportunities for individual players to succeed – or fail. Stealing customers from the competition may be a sufficiently winning strategy for many companies, while developing ...

## News Consumption - UK

“Many people are looking for greater coverage of the climate crisis from news sources. Young women, a demographic that is comparatively less engaged with news content, are particularly inclined to feel there is not enough coverage of this issue.”

– **Rebecca McGrath, Associate Director for Media and Technology**

## Packaged Red Meat - US

“While red meat has notoriously struggled with a less-than-healthy perception, despite accolades for protein content, the category has earned somewhat of an indulgent reputation in both a positive and a negative sense. More than seven in 10 category participants agree that quality is worth increased price, yet 4 in 10 ...

## PC Gaming: Desktops and Laptops - US

“PC gaming today is the best it's ever been. PC gaming drives esports and is a major part of streamer culture's broad appeal. PC players are heavily invested in keeping their gaming rigs up-to-date with newer and better

pandemic driving digital payment adoption and inflation causing ...

## Personal Care Appliances - China

"The growth of personal care appliance market slowed down significantly in 2022 compared to the previous year. Nevertheless, the strong purchasing interest of consumers (whether to replace the existing products or buying new ones) indicates the future growth potential of the market. Personal care appliances that can help improve personal ...

## Private Label Food and Drink - US

"Inflation has given private label food and drink a big short-term boost as shoppers have looked for ways to stretch their grocery budgets. To maintain growth in the long run, however, retailers will need to continue evolving store brands beyond savings alone. Private label offers a unique opportunity for retailers ...

## Quick Service Restaurants - US

"Fast food restaurants' competitive edge, value, is at risk amidst economic uncertainty and tightened consumer budgets. QSR operators will need to work harder for consumers' dining dollars, justifying the increase in menu prices by improving menu offerings, sustaining tech investments and delivering a highly personalized dining experience that builds long-term ...

## Restaurant Marketing Strategies - US

"Word-of-mouth recommendations from family and friends remain the most prevalent restaurant discovery source, followed in importance by reviews on social platforms that speak to taste, visual appeal, and service. The foodservice industry remains competitive, especially as consumers become more digitally connected, heightening the need to stand out through communications that ...

## Senior Food and Drink Solutions - China

components, and they're a highly brand loyal demographic."

## Plant-protein Drinks - China

"Nutritional profile can help retain consumers' spending on plant-protein drinks under cautious spending. However, as homogenous nutrition fortification emerges, different bases have to establish unique nutritional advantage to remain competitive. Other than nutrition, flavour innovation and differentiating texture for pairing drinks can help the category better tap into consumers' segmented ...

## Property and Casualty Insurance - US

"With an economic downturn possible in 2023, this year is shaping up to be an extension of the carriers' headwinds faced in 2022. Elevated inflation has boosted the costs of repairs and replacement parts, leading to larger claim pay-outs from insurers. Homeowners have been especially constricted by the Federal Reserve ...

## Researching and Buying Technology Products - UK

"Renting technology products can have an important role to play as consumers look to reduce their spending during the cost of living crisis, but it also has environmental benefits. Brands which promote the sustainability angle can engage higher earners in particular as they are significantly more likely to consider the ...

## Role of Transportation - US

"Current economic and automotive market conditions have presented some challenges for car ownership, driving some consumers to turn to alternate means of transportation. As consumers return to pre-pandemic activities, alternate methods of transportation will continue to play a valuable role, but will won't replace the benefits of personal vehicle ownership ...

## Shampoo, Conditioner and Hairstyling Products - US



"In the upcoming years, policies will have a big impact on the lives of China's elderly. After COVID, immunological support will continue to be a top priority for seniors. Helping senior people learn how to adjust physically and mentally to work up to the age of 65 will inevitably ...

## Shaving and Hair Removal - US

"The shaving and hair removal market remains stable in terms of usage and consumption thanks to the functionality and essential nature of the category. However, obstacles to growth exist as consumers evaluate their BPC routines through a lens of intentionality, eco-friendly behaviors and budgeting. Even so, opportunities exist to further ...

## Sustainability in Travel - UK

"Consumers increasingly expect to see sustainable tourism practices, along with complete transparency from travel brands on their sustainability credentials. With two-thirds of consumers perceiving travel companies to be guilty of greenwashing, it is essential for travel brands to step up and take accountability for their environmental impact. In order for ...

## Trending Flavors and Ingredients in Non-Alcoholic Beverages - US

"Non-alcoholic drinks are riding waves of curiosity away from alcohol and toward innovative flavors and ingredients. Millennial interest is especially strong, and driven by a sense of familiarity amidst novelty, brand loyalty, the appeal of functionality and fun."

## Valentine's Day - UK

"Valentine's Day 2023 was challenging with the number buying gifts falling and average spending down among those who did spend. 2024 is likely to be more promising as confidence improves, particularly if brands and retailers can reframe the event as not just romantic but also one that taps into the ...

## 个人护理小家电 - China

"The hallmark of the mature shampoo, conditioner and hairstyling product market is slow, steady growth. Its essentialness to one's personal care routine provides a reliable platform for industry players; however, consumers' prioritization of appearance and health is advancing expectations and innovation within the category. Prestige brands are driving the skinification ...

## Shaving and Hair Removal Products - Canada

"Shaving and hair removal are considered routine behaviours for the majority of Canadian consumers, with many consumers removing unwanted hair from multiple areas of the body and face. While this obviously differs by gender, both men and women have strong category engagement. The cost of living increases have encouraged consumers ...

## Toilet and Hard Surface Care - UK

"The toilet and hard surface cleaning market is being doubly impacted by the continued return to pre-pandemic cleaning routines and the additional focus on saving money as a result of rising inflation. This is creating a difficult environment for brands to grow, and this is likely to continue over the ...

## Understanding LGBTQ+ Communities - US

"As LGBTQ+ communities contend with financial uncertainty, strained mental wellbeing and mounting legislative attacks, consumers need more than simply inclusivity exercises from brand allies. LGBTQ+ people and their loved ones fear for the future of LGBTQ+ acceptance and rights in the US. They need and expect brand allies to take ...

## Varejo de Alimentos e Bebidas - Brazil

"Com visitas mais frequentes e compras menores, os varejistas precisam se adaptar para acolher um maior número de clientes, e criar um ambiente agradável e prático, para que o consumidor não perca muito tempo dentro do estabelecimento. O consumidor mostra interesse pelo uso da tecnologia, assim como por varejistas que ...

## 中老年食品饮料消费趋势 - China

“相比前一年，2022年个人护理小家电市场的增速明显放缓。不过，消费者对更换现有产品和购买新兴产品均表现出强烈兴趣，体现出该市场的未来增长潜力。有助于消费者改善个人健康状况、提升自我形象管理的个人护理小家电将具有很大的吸引力。此外，品牌需要拓展个人护理小家电的使用场景，突破日常场景的局限，更多地关注小众消费群体，发掘新的增长机会。”

—— 姚滨妍，研究分析师

## 对可持续性的态度 - China

“消费者如今已成为可持续产品支付溢价的共识，但对于真正的可持续产品应具备什么特点提出了更高的要求。品牌需在整个产品生命周期不同阶段都提供更具可持续性的选择，从而说服消费者并证明其溢价的合理性。除了产品，若品牌能为消费者提供有关可持续的实际体验，如线下绿色店铺或线下可持续主题活动，便可以更有效地与消费者就可持续进行沟通。”

—— 任敏惠，研究分析师

## 抗衰老产品 - China

“消费者正采取各种解决方案来对抗衰老，但面部护肤品仍是最主流的抗衰老对策，其地位没有被美容仪器和美容保健品过多蚕食。然而，品牌仍需要仔细考虑升级有效、不刺激的成分以迎合不同皮肤状况的消费者，并在产品形态和质地上创新，以维持消费者的兴趣。此外，随着消费者采取全方位抗衰老方案来维持年轻外表，抗衰老概念不仅局限于面部肌肤，也正扩展至身体肌肤和头皮。”

—— 靳尧婷，高级研究分析师

## 果汁和果汁饮料 - China

“在果汁市场势不可挡的高端化趋势之下，能够证明其价值并与消费愈发审慎的消费者产生共鸣的品牌将得到认可。由于消费者营养缺乏和对健康饮食的重视，为果蔬汁赋予有助于实现全面营养的定位能够提升饮用频率；同时，品牌也可以重点突出与当今社会人们担忧的方面相关的功能性益处，如心理健康表现。”

—— 张辰钰，高级研究分析师

## 电动和混动汽车 - China

“随着新能源车渗透率的提升，新能源车车主的积极口碑推动了新能源车的产品力的认可度。从调研结果来看，驾驶、乘坐舒适性、充电续航等方面的满意度超过了7成，说明新能源车产品已经能够满足大多数车主的日常使用需求。购车方式上，消费者接受度日益增高的电池可换、车

“未来几年，政策将对我国中老年人的生活产生重大影响。新冠疫情之后，免疫支持对中老年人而言仍是头等大事。帮助中老年人调整身心以便工作到65岁必将是未来的创新方向。”

—— 彭袁君，高级研究分析师

## 对肤色管理产品的态度 - China

“尽管美白功效宣称受到更严格的监管，但由于消费者需求强烈，并且解决问题的方式多种多样，肤色管理仍将是所有热门功效中至关重要的一项。另一方面，随着面部护肤品领域围绕成分和功效的竞争加剧，品牌需要通过出色的故事讲述和沟通实现突破，同时在抗污染/蓝光等新的小众细分领域或面部底妆等相邻品类寻找机会。”

—— 蒋亚利，美容个护品类副总监

## 方便食品 - China

“新冠疫情的缓解导致方便食品品类的增速放缓。由于该品类面对日趋激烈的内部和外部竞争，品牌需升级其产品的口味和营养价值以展现独特卖点，借此吸引在疫情发生后对价格更为敏感的消费群体。”

—— 殷如君，高级研究分析师

## 植物蛋白饮料 - China

“在消费者谨慎对待支出的情况下，植物蛋白饮料的营养形象有助于促使消费者保持在该品类上的消费。但是，随着强化营养特征趋于同质化，不同基底必须建立独特的营养优势，以保持竞争力。除了营养以外，风味创新以及适合作为搭配饮料的差异化质地有助于该品类更好地挖掘消费者的细分需求。”

—— 黄梦菲，研究分析师

## 菜单洞察——茶饮店 - China

茶饮店目前仍保持快速增长态势，不过品牌应该开始着力于培养消费者忠诚度，而非追求快速增长。融入传统和当地特色，可以更好地传递品牌价值。品牌可以通过不同的茶底和奶底来实现差异化。同时，彰显自我的元素对于留住Z世代消费者至关重要。



电分离等灵活购车模式或成为品牌运营方面的新机遇、新赛道。App私域运营方面，品牌可以通过用户共创等形式，活跃社区自运营，打造用户生态圈，提升私域价值。”

— 袁淼，研究分析师

## 针对Z世代的营销 - China

“Z世代同时做加法和减法，以寻找生活的平衡，而非‘什么都想要’。一方面，他们渴望更多高质量的体验和丰富的社交网络与互动，另一方面，他们希望找到方法将自己从无关紧要的琐事、无效社交和‘信息茧房’中解放出来，从而缓解焦虑，更好地享受生活。为Z世代提供安全感、对生活的掌控感和身心健康的品牌能够赢得他们的信任，并且极有可能获得他们的忠诚度。”

## 面膜 - China

“为了鼓励消费者尝试面膜产品，品牌需要围绕产品的肤感讲好故事，既可以从产品质地和膜布材质入手，也可以从创新的产品形态入手。此外，敏感肌消费者是面膜品类中极具潜力的消费群体。品牌需迎合他们的需求，打造专业、高端的形象，以保持竞争力。”

— 柴静彦，高级研究分析师

## 针对年轻家庭的营销 - China

“年轻父母对养育孩子的态度发生了明显改变。他们越来越重视‘陪伴’在孩子成长过程中的作用。随着减轻孩子学习负担的需求日益明确，保护孩子们的童心和创造力正成为更重要的事。科技的发展不仅改变了教育和信息来源的形态，也在影响家长对孩子未来发展方向的思考方式。与此同时，年轻父母对自我实现的追求并没有在育儿期间停止。他们希望孩子成为自己动力和灵感的源泉，而不是束缚。儿童品牌在与消费者沟通时，需要展现出‘与孩子一同成长’的姿态，避免‘说教者’的形象。”

— 张泽龙，高级研究分析师