

March 2020

## Accessorising the Home - UK

“Spending grew again in 2019; however, the market is increasingly split into two; a divide increasingly characterised by age. The newer dynamic demand for trend-driven home accessories, favoured by younger shoppers as a means of affordable personalisation, continues to open avenues for growth. However, the next few years will be ...

## Attitudes towards Home Delivery and Takeaway - UK

“Brits are turning to third-party services to order home delivery/takeaway food, attracted by convenience and the ever-growing range of options. Virtual brands operating through dark kitchens will be crucial to expanding reach and order frequency, although operators must be upfront with consumers about how and where food is prepared ...

## Auto Market Beat - Q1 - China

“With the rough start and overall sales being impacted by the outbreak in the first quarter of 2020, how to show an outstanding performance in the following quarters becomes a common question for brands. From the perspective of product development, Toyota, BMW and Mercedes-Benz gained positive growth against an overall ...

## B2B Economic Outlook - UK

“Although the UK leaving the EU has created uncertain times, albeit one with opportunities, a longer running issue has been that of productivity levels. Relatively low levels of investment and R&D spending have driven this stagnation and future economic policies must focus around these and ‘upskilling’ the UK workforce.” ...

## Beverage Blurring - China

“Hybrid formulations are on the rise, bringing together ingredients, functional benefits, tastes and textures from two or more traditional drinks categories, and invigorating the non-alcoholic beverage market. With the blurring innovation rooted in the primary categories receiving positive feedback, opportunities for tasty, healthy, and eye-catching features wait to be tapped ...

## Athleisure Brands - China

“Athleisure has been popular for the past five years, and there is no sign of it falling out of favour. Although leading athleisure brands have seen an economic hit during the recent coronavirus outbreak, the negative impact is likely to be temporary as Chinese urbanites are getting more health-conscious and ...

## Attitudes towards Sustainable Packaging - China

“Eco-consciousness is rising quickly through regulatory efforts and media communications. Chinese consumers are starting to take waste problems seriously, hidden behind the boom of fast fashion, online shopping and delivery services. Instead of pushing the problems to the brands, most consumers have been making efforts to avoid single-use items and ...

## B2B E-Commerce - UK

“E-commerce is a strongly established market in the UK compared with other European countries. The B2B market has long been much larger than the B2C sector largely as a result of the inclusion of EDI as well as websites. The experience of Millennials in the B2C market is now impacting ...

## Baby Food and Drink - UK

“That parents would like to see more chilled and frozen varieties poses an opportunity for further expansion in these areas, these being largely untapped in baby/toddler food. While moving into the chilled or frozen aisles comes with hurdles in terms of costs, price points, shelf-life and visibility, the strong ...

## Black Consumers' Culture and Community - US

Black adults are proud Black Americans. Black culture is the foundation for their identity, and they are proud of how their culture – and, by extension, their presence – influences and is woven within the American tapestry while keeping their sense of self intact. While Black adults are rooted in ...

## Bundled Communications Services - UK

“The bundled communications market decreased slightly compared to last year, mainly due to the continued reduction in landline usage. Whilst quadplay bundles are currently niche, there is clear room for growth, with four in ten non-quadplay subscribers open to it. The appropriate target market for quadplay is Millennials and mid-contract ...

## Car Purchasing Process - UK

“Car purchasing continued to suffer during 2019 with sales of both new and used cars continuing to decline. The situation is set to get worse in the short-term as COVID-19 impacts on the market during 2020 although an improvement is expected thereafter. Going forward, understanding the polarisation taking place in ...

## Chilled Drinks - China

“Premiumisation trends in food and drinks bring great market opportunities to chilled drinks. Inevitable upgrades in cold chain transportation also clear the issues of transportation and preservation. However, the consumption demand for chilled drinks is mainly driven by the pursuit of better taste. Brands need to use attractive selling points ...

## Consumers and Online Financial Advice - UK

“Automation and the shift towards digitisation are making financial advice more accessible and affordable, a trend that is set to finally democratise the market. Consumers, particularly younger ones, are generally open to robo-advice services, and people are not against paying for these as long as cost-savings are passed on to ...

## Convenience Stores - US

“While fuel sales generate as much as two thirds of total convenience stores revenue and remain a core traffic driver, c-store operators are increasingly turning their attention to in-store categories as the most direct path to increased sales and profits. Still, convenience stores face considerable challenges in categories like foodservice ...

## Cannabis in Food and Drink - US

“Channels for food and beverage with cannabis as an added ingredient have opened doors that the quintessential “special” brownie never dreamed of, but legal restrictions still constrain how high edibles and drinkables can fly. On-premise options are limited, and distribution is still intra-state only; but creative chefs and entrepreneurs have ...

## Carnes e Aves: Processados, Não-processados e Alternativas - Brazil

“Atualmente o preço e a preocupação com a saúde são os pontos que mais impactam negativamente a categoria. Diante desse cenário, para não perder espaço junto ao consumidor brasileiro, a categoria precisa ser criativa e encontrar formas de oferecer opções mais acessíveis atreladas a ocasiões de consumo indulgentes e relembrar ...

## Clean Beauty - China

“Though gathering positive attitudes from consumers, further growth of clean beauty is likely to be hindered due to low awareness in China market and consumers’ cognitive ambiguity. This calls for brands’ efforts on consumer education on its differentiation from current organic/natural beauty concepts. On the other hand, consumers’ needs ...

## Convenience Store Foodservice - US

Convenience store foodservice sales continued to struggle in 2019, with slow growth predicted over the next five years. The largest factors contributing to the slow growth are fast food and retail competitors, from chicken chains to mobile-based retailers. C-stores will need to look beyond core foodservice programs such as coffee ...

## Critical Illness Cover - UK

“Just as definitions are being simplified, new complexity is being added in the form of tiered products, life-stage boosters and later-life add-ons. While these innovations undoubtedly enhance the product, they also make it harder to compare policies. Renters, the self-employed, gig economy workers and women all remain under-protected and insurers ...

## Digital Trends - Q1 - China

"Observed in Q1 2020, the biggest ownership growth is in gaming console. In specifics, post 1990s and post 1970s are the top two generations driving this increase. Commercial 5G users are not ready. A result from the disruptive COVID-19 outbreak, consumers have been delaying their product upgrades. As the livestream ...

## Disposable Baby Products - US

"After experiencing plummeting sales in 2017, the disposable baby products market continues to stabilize, reaching \$8 billion in total 2019 retail sales, an increase of 1.7% from 2018-19. However, market sales are expected to slow due to declining birth rates, parents' value-driven approach to the category, as well as ...

## Electrical Wholesalers - UK

"The next few years are likely to remain challenging for the electrical wholesalers market with sector-specific demand opportunities combining with continued price pressures. These challenges are being further compounded by the rapid increase in online competition. Wholesalers are responding by adopting customer-centric, multi-channel business models and looking at opportunities to ...

## European Retail Briefing - Europe

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

## Feeding the Family - US

"Providing meals for the family is an everyday job for parents; 98% say they are responsible for preparing at least some, if not most, of the meals the family eats. Parents want to provide healthy, satisfying meals while also ensuring maximum enjoyment for all family members."

**- Ariel Horton, Research Analyst**

## Dips and Savory Spreads - US

"Increased snacking and innovation in the refrigerated segment have served the dips and spreads category, pushing expected sales to reach \$4.9 billion in 2020, a 3.4% increase from 2019. There is a momentum of innovation in the category, both benefiting and challenging category players, who will need to ...

## Drug Stores - US

"US drug store revenues will exceed \$300 billion this year. While the channel has consistently posted gains, the pace of growth is projected to slow down in light increased competition from outside the channel and a shifting consumer preference toward generic drugs over name brands. With new partnerships and new ...

## Esports and Gaming - Canada

"The video game industry has evolved over the decades from a niche subculture to a mainstream hobby. Along the way, some consumers started to seek out ways to watch others play – whether in official esports tournaments or more casual live streams. And many of these viewers also aspire to ...

## Exercise Trends - US

"In today's health-driven society, commitment to exercise is universal, permitting year-over-year growth of the health and fitness club industry. As a form of exertion, exercise is inherently connected to improving and maintaining physical health. However, benefits outside of physical pursuits, such as mental/emotional wellbeing, are gaining traction as consumers ...

## Female Car Consumers - US

"Female purchasing power is recognized across numerous industries: beauty, household, retail – the list goes on. But when it comes to making car purchases, women are made to feel as if their money and buying power doesn't matter as much as their male counterparts'. Despite perceptions that women aren't into ...

## Fleet Services - UK

“The fleet services sector continues to develop innovative mobility solutions to meet market demand for reduced costs in a regulatory environment that penalises emissions. With recent taxation changes, transitioning to electric vehicles has become a cost-cutting opportunity that the sector’s expertise and intermediary position is primed to deliver. On the ...

## Health Food Retailing - UK

The market for health foods continues to grow on the back of the rising trend for health and wellbeing but consumers remain sceptical of the potential benefits of the products. While there are opportunities for specialist retailers to remain relevant, online retailers and especially supermarkets have been working hard to ...

## Hispanics' Culture and Community - US

“As Hispanics account for nearly 20% of the US population, they are intrinsically present in groups and communities across the US. How Hispanics meet the people that make up their social circles, in addition to the factors that strengthen them, shows how both groups and communities are multidimensional, with trust ...

## Instant Foods - China

“As instant foods reach more consumers with the expansion of online channels, consumers are no longer satisfied with just a convenient solution and have started looking for factors regarding nutrition and quality. Consumers will expect instant foods to evolve towards becoming more like freshly made meals. Product innovation in the ...

## Leisure Outlook - UK

“The coronavirus outbreak presents a catastrophic threat to the sector both in the short- and long term. Meeting Brits in the home can help mitigate losses for some, for example through virtual entertainment and delivery food services. Transparency and flexibility will be welcomed by consumers.”

## Hábitos de Consumo de Snacks - Brazil

“A categoria de snacks tem sido impulsionada a focar em opções mais saudáveis, seja por meio de regulamentações legais ou pela demanda dos consumidores. Apesar desse foco na saudabilidade, é importante que a categoria tenha em mente que uma das suas funções primordiais também é a conveniência, e para tanto ...

## Healthy Dining Trends - US

“The percentage of healthy diners is growing, aligning with the increased availability of lifestyle fare, including plant-based and low-carb options. Millennials are the healthiest diners, but right behind them, Gen Z is the most indulgent generation, demonstrating the need for a balanced menu. Convenience and kid-friendliness are the deciding factors ...

## Holidays to France - UK

“Growing rail connectivity, along with the country’s low reliance on fossil fuels for its electricity, offers the opportunity to position France as a low-carbon holiday choice in the era of climate emergency and ‘flight shame’.”

– **John Worthington, Senior Analyst**

## Internet Influencers - US

“As the influencer market matures, brands have taken them more seriously as a tool for promotion and collaboration. Trust and authenticity go a long way in establishing relationships between influencers and followers, and brands need to take their time to find the right influencer to disseminate their messages. There’s still ...

## Life Insurance - Canada

“Knowledge and trust deficits around life insurance are inhibiting growth in ownership.”

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

## Major Household Appliances - US

"The major household appliance market experienced continued steady, conservative growth sustained by positive economic factors, coupled with a consistent stream of appliance innovation. The market is challenged by numerous factors, such as long replacement cycles. However, manufacturers could accelerate growth by appealing to evolving lifestyle-related interests."

## Marketing to Women - UK

"When it comes to the role of gender in advertising, women, like men, are starting to feel as though advertisers are making too much of gender politics. As more brands play into themes about female empowerment, women are starting to question how genuine brands are being and if they are ...

## Media Trends Spring - UK

"The most popular length of video on YouTube among Gen Z is 21 minutes or more, reflecting how the platform has developed and the opportunities it now presents in terms of content and advertising. The popularity of longer videos on social media allows for greater incorporation of both pre-roll and ...

## Menswear - UK

"While there are still opportunities for growth in the menswear market, the sector has become much more competitive and more challenging. Faced with greater choice, male shoppers have become more demanding and savvier, seeking out quality products, whilst remaining price-conscious and aware of the large number of discounts available. A ...

## Mortgages - Ireland

"Both NI and RoI have seen an increase in new mortgage approvals between 2018 and 2019 despite any concerns the Brexit might be causing Irish consumers when taking out a mortgage. Moving forward, the market seems set to continue to grow and demand for housing increases."

– Brian O'Connor ...

## Marketing to LGBTQ+ Communities - US

"This Report focuses on the growing LGBTQ+ population in the United States, and explores the challenges, concerns, and unique experiences of these consumers. By assessing perceptions of LGBTQ+ inclusivity and representation, as well as reactions to Pride marketing efforts, this Report aims to help clients better understand how to effectively ...

## Meat and Poultry: Processed, Non-processed and Alternatives - Brazil

"Price and health concerns are the main reasons why Brazilian consumers are eating meat or meat alternatives less often. Brands and companies, therefore, need to be creative and find ways of offering affordable options that can be perceived as a treat, and remind consumers about the nutritional benefits of the ...

## Men's Haircare and Skincare - UK

"A continued decline in value sales of men's haircare and skincare is creating a challenging environment for both brands and retailers. Savvy shopping habits are putting downward pressure on prices in both categories, and men still favour a basic routine. Opportunities to reinstate growth in the market lie in personalisation ...

## Mobile Network Providers - US

"The US mobile telecommunications market is valued at nearly \$250 billion, and the industry is expected to undergo rapid changes in the next couple of years due to advancements in network speeds and innovation. The implementation of 5G networks and connections will play a big role in consumer decision making ...

## Motor Insurance - UK

"The car insurance market experienced a turbulent 2019, with many providers posting a reduced income, and profit. Despite this there are positive signs for the market over the next five years. With greater clarification over the Ogden rate, providers will be more confident in their pricing strategies. Additionally, the move ...

## Online and Mobile Retailing - Ireland

“The online market continues to grow in Ireland gaining its share of the wider retail market. The growth in mobile commerce is helping to boost online sales while also impacting the ownership of other internet-enabled devices including laptop/tablets etc. The advanced capabilities of smartphones coupled with the rollout of ...

## Oral Care - China

“Over half of consumers are keen on using gum caring and anti-sensitivity toothpastes even if they haven’t experienced related dental problems. This makes the idea of prevention over treatment solid and could be expanded into other functions, such as whitening, preventing calculus, and maintaining a balanced oral microbiome.”

– ...

## Property & Casualty Insurance - US

“Property and casualty insurance is often compulsory, and therefore ownership remains high across auto and homeowners policies. In a quickly changing market that will be affected by D2C (direct-to-consumer) offerings, insurers need to differentiate themselves not only in price, but in overall customer experience.”

- Jennifer White Boehm, Associate Director ...

## Snacking Consumption Habits - Brazil

“The snack category has been driven to focus on healthy options, whether through legal regulations or consumer demand. It is important, however, to keep in mind that one of its primary functions is to be convenient, thus it is essential to think about formats that offer convenience and quick consumption ...

## Sports and Performance Drinks - US

“The nearly \$9.5 billion market is expected to grow modestly over the next five years, reaching more than \$11 billion by 2024. Performance-centric claims and

## Online Grocery Retailing - UK

“In 2019 growth slowed for the fourth consecutive year in the online grocery market, as the sector continues to struggle to reach new customers with much of the growth in the market coming from existing users. The start to 2020 has seen growth rapidly accelerate due to the COVID-19 outbreak ...

## Potato and Tortilla Chips - US

“The chip category is in the midst of a decade of steadily growing sales, which should near \$17 billion by 2024. Nevertheless, the category faces challenges: increased snacking among consumers has boosted the category, certainly, but it has also led to a rise in competitors, particularly options which promise a ...

## Ride Sharing and Mobility Services - Canada

“While most consumers utilize public transportation, alternative services such as ride sharing are gaining momentum with usage near that of taxis. Advances in technology have disrupted traditional transportation options including public transportation, taxis, as well as the way consumers use their personal vehicles. The future of transportation services like ride ...

## Soap, Bath and Shower Products - Canada

“The soap, shower and bath market appears stable and set for slow, modest growth going forward. The functional and hygienic purpose of the category makes usage in Canada near-universal.

## Sugar and Gum Confectionery - UK

“With myriad products competing to give consumers a mood-boosting sugar fix during times of uncertainty, compelling NPD will remain vital for players in the



informative messaging can help set brands apart. However, competition from other functional food and drink options (eg water, BFY snack bars) will challenge the ...

## Sweet Biscuits and Snack Bars - UK

“The permissibility of eating small amounts of sweet biscuits each day is continuing to support sweet biscuit sales. Portion-size packs, healthier biscuits, seasonal lines and a quality over quantity approach all offer opportunities for brands in biscuits, but familiar favourites offering crunchy biscuits and chocolate coatings will remain most popular ...

## Travel Money - UK

“Consumers’ love of overseas holidays has seen overseas spending by Brits continue to increase despite a reduction in business spending abroad. This demand will remain in the coming years, but travel money providers face a growing threat from digital banks.”

## Trends in Baked Goods - Canada

“While the vast majority of Canadians still reach for baked goods, concerns around sugar and carbs persist. As a result, much of the innovation in the space looks to address apprehensions around health in baked goods, balancing this consideration with indulgence, which is particularly important when it comes to sweet ...

## Women's Haircare - UK

“Women’s haircare continues on a downward trajectory when it comes to value sales, with the styling segment in particular suffering losses. Hair health is paramount to women, impacting haircare behaviours through a reduction in frequency of washing and styling hair. Whilst ‘clean’ and natural claims continue to be important, sustainability ...

## 冷藏饮料 - China

“食品饮料的高端化趋势为冷藏饮料带来极大的市场机会。冷链行业不可逆转的升级也扫清了产品运输和储存的障碍。但是，对更好口感的追求仍是冷藏饮料消费的主要

sweets market. Lower-sugar sweets, vegan sweets and premium sweets continue to offer a lot of potential. Focusing on UK provenance and more environmentally friendly packaging would ...

## Toilet and Hard Surface Care - UK

“As much as the category remains price-driven, savvy consumers are not willing to compromise on product quality, indicating that cleaning efficacy is an essential purchase driver and should be targeted in marketing communication. However, it is crucial that manufacturers also take environmental sentiments into consideration, which should represent inspirational input ...

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

“The crowded and often complicated non-alcoholic beverage industry is a pace setter in the world of product innovation, tapping not only into functionality but also a solid launching point for unique flavor innovation. Taking a look at the “now, near and next” of flavor and ingredient trends in the non-alcoholic ...

## UK Retail Briefing - UK

**This month's UK Retail Briefing includes the following:**

## World Cuisines - UK

“World cuisines are an ingrained part of UK menus. Within established cuisines strong demand for newness points to opportunities for introducing new formats, whilst providing on-pack explanations of unfamiliar dishes should help emerging cuisines grow their user base.”

## 口腔护理 - China

“逾半数消费者热衷于使用牙龈护理和抗敏感牙膏，即使他们没有遇到相关的口腔问题。这意味着预防胜于治疗的理念已牢牢占领心智，并可扩展到其他功效上，如美白、

驱动力。品牌应使用除口感以外更有吸引力的卖点，扩展其品牌价值并推动消费，因为新冠肺炎爆发之后消费者可能会更关注产品的营养和健康功效。由于关于冷藏饮料的负面看法更少被年轻消费者接受，品牌可利用他们客观的态度，将冷藏饮料的受众拓展到年轻消费者之外的其他群体。”

## 对环保包装的态度 - China

“在监管措施的实施和媒体的宣传下，消费者的环保意识正迅速提高。中国消费者开始认真对待隐藏在快时尚、网购和快递/外卖服务蓬勃发展背后的垃圾问题。大部分消费者没有将问题推给品牌，而是已经采取行动，避免使用一次性物品并且对包装进行重复利用。环保包装的新理念，例如打造生态时尚潮流，为回收利用搭建便利的收集系统以及提供有趣和定制化的体验，能有效地吸引消费者参与品牌环保活动，并且也有利于建立品牌与消费者之间的长期连结。最后，至关重要的一点是，品牌要积极地向消费者宣传其环保策略的目标和进展，从而避免消费者认为其环保行动只是营销噱头。”

- 邵愉茜，初级研究分析师

## 方便食品 - China

“由于线上渠道的扩张，方便食品触及到更多消费者，消费者不再满足于一个便利的套餐，并且已开始寻求营养和质量方面的因素。消费者将期盼方便食品越来越像新鲜现做食品。未来的产品创新将需要更主动为消费者在健康益处、风味选择、产品安全性、原料质量和生产技术上提供额外的价值和功能性。”

- 蒋安妮，食品和饮料研究分析师

## 纯净美容 - China

“虽然消费者对纯净美容持积极态度，但由于其在中国市场认知度较低，并且消费者认知模糊，因此纯净美容的进一步发展可能会受到阻碍。这需要品牌在消费者教育上多下功夫，将纯净美容与目前的有机/自然美容概念区分开来。另一方面，消费者对纯净美容的需求主要集中在产品的安全性和功效性上，说明在现阶段，品牌应该通过强化功效来回应消费者的期望，而不是仅仅围绕安全性。”

- 蒋亚利，高级分析师

预防牙结石和维持口腔菌群平衡等。”

- 尹昱力，初级研究分析师

## 数码趋势——一季度更新 - China

“在2020年第一季度，游戏机的拥有率增长最快。具体而言，90后和70后是推动这一增长的两大代际。商业5G用户尚未准备就绪。由于具有破坏性的新型冠状病毒肺炎（以下简称“新冠肺炎”）的爆发，消费者一直在推迟产品升级。随着电商和在线学习的推动，直播商务市场不断出现新的内容，娱乐、专业性、同侪压力成为三大成功要素。”

- 许昕远，初级研究分析师

## 汽车市场动态——一季度更新 - China

“在2020年第一季度整体销量受到疫情影响出师不利的形势下，如何能在后几个季度中有出色表现成为各品牌面临的共同课题。从产品开发的角度来看，丰田

(Toyota)、宝马 (BMW) 和奔驰 (Mercedes-Benz) 在2019年末不断推出改款车型后，配合其与消费者互动的营销手法，获得了相当不错的逆势上升。从营销渠道来看，疫情爆发后，传统的线下营销模式受到相当大的冲击，加速了原本已随着社交网络的渗透而发展起来的线上营销的比重。品牌方应该通过加强在不同的市场营销阶段与不同类别的汽车意见领袖的合作，以直播等即时互动形式积极保持并拉近品牌与用户的关系。”

- 周同，高级研究分析师

## 跨界饮料 - China

“混合饮料的形式正在兴起，结合两种或以上的传统饮料品类的用料、功能性益处、口感和质地，带火了非酒精饮料市场。随着植根于主要品类的跨界创新获得积极反馈，口味好、健康和吸引眼球的产品特征所带来的商机亟待开发。”

- 徐文馨，高级分析师





本报告分析以下问题:

## 运动休闲品牌 - China

“运动休闲在过去5年中持续火热，并且毫无热度减退的迹象。尽管领先运动休闲品牌在最近的新冠疫情中受到了经济冲击，但这样的负面影响很有可能是暂时的，因为中国城市居民的健康意识不断加深，并且对全方位运动服装的需求也日渐增强。面临着来自于时尚品牌和奢侈品牌在运动休闲市场的挑战，运动服装品牌在品牌价值、产品设计和专业运动服装上仍保有强大的竞争力。运动品牌在满足消费者对舒适和合身的需求上走在前列。”

— 夏月，研究分析师