

October 2018

Activewear - US

"The activewear market continues to help lift the broader apparel market which has softened in the past few years as consumers have prioritized spending on experiences rather than tangible goods. More consumers are exercising and prioritizing their health and this should continue to fuel the market for performance items. Comparable ...

Attitudes to Low/No/Reduced Sugar Soft Drinks - UK

"The public spotlight on soft drinks has ensured that most users claim to try to make healthy choices at least most of the time. However, this typically stops at checking the added-sugar credentials of drinks, very few people scrutinising their ingredients or nutrition details. This puts the onus on healthier ...

Beauty Devices, Tools and Accessories - UK

"Although the value of electrical devices and hair appliances has grown to an estimated £834 million in 2018, new multipurpose appliances threaten long-term growth opportunities in this sector. Non-electrical tools retain popularity via design and self-expression, and consumers continue to use a wide range of non-electrical tools. Opportunity lies in ...

Better-for-you Snacking - Canada

"Virtually all Canadians are active snackers, enjoying snacks throughout the day as the act of snacking is seen as part of a healthy lifestyle. Canadians prioritize keeping healthy snacks on-hand and are driven to do so to satisfy cravings, no matter the time of day. Attitudes reflect that snacking is ...

Cheese - Canada

"With the vast majority of Canadians eating cheese at some point, the challenge for cheese makers is finding avenues for future growth and potential areas of challenge. This Report endeavours to provide a topline snapshot of the Canadian cheese consumer, providing

Airports/Air Travel Experiences - Ireland

"The majority of Irish consumers would like to see a greater variety of dining options within airport terminals. Airport operators should therefore continue investing in developing their catering proposition and look to more unique food and drink concepts to create a unique experience, increase dwell time and boost spending within ...

Baby Supplementary Food - China

"With stricter regulation under way, parents are now more confident feeding their children packaged baby supplementary food. Coupled with strong willingness to trade up, total market value is expected to maintain steady growth in the next five years. Products with organic, local and functional claims are attracting greater attention in ...

Beer and Craft Beer - US

"Dollar sales of beer, craft beer, and cider are estimated to reach \$112 billion in 2018, up 1.1% over 2017 totals. Dollar sales of beer will level, with very small year-over-year gains projected through 2023. Volume sales are declining at a higher rate (with an estimated dip of just ...

Breakfast - Ireland

"Despite being touted as the most important meal of the day, the majority of Irish consumers are making time to eat breakfast but perhaps not every day. Product innovation paired with consumers' increasingly busy schedules is causing some to switch to snacking for this occasion – offering opportunities to brands ...

Cheese - UK

"Strong interest in purchasing cheese from local producers in supermarkets creates scope for the grocers to tap into the allure of specialist cheese shops, while leveraging the overarching interest in buying British produce. Meanwhile, the trend towards reducing meat

companies with empirical information that informs strategic decisions. Data ...

Chinese Airlines - China

“China is to be the world’s biggest air-travel market by 2022. Growth in demand for air travel will be driven by the ongoing expansion of Chinese disposable income. Indeed, it is projected that 35% of China’s population will be in the upper-middle-class income bracket or better by 2030, up from ...

Clothing Retailing - France

“In a low growth market, the French retail clothing sector is changing. Online is encroaching on specialists’ sales and exposing weaknesses in the traditional retailers, many of which are closing stores and restructuring. Social media is now a crucial tool for reaching younger customers, and environmental concerns are set to ...

Clothing Retailing - Italy

“Italy is the largest of the four big European markets (eg France, Germany, Italy, Spain) in terms of per capita spend on clothing and footwear. However, in the past few years, growth in spending has stalled, and it is clear that the underdeveloped nature of the online channel has contributed ...

Clothing Retailing - UK

“The UK clothing market is going through a dramatic period of change. Online is not only capturing a greater share of consumer spending, but it is also highly influential in what consumers are choosing to buy – no matter where they are making the final purchase. Whilst the online-only retailers ...

Consumers and Health Insurance (PMI and HCPs) - UK

“Conditions are tough in the UK private health insurance market, with affordability putting pressure on customer numbers and Brexit creating a more cautious corporate climate. Providers are rightly focussed on customer retention and controlling costs in order to maintain profitability.”

consumption presents an opportunity for the market to encourage more frequent ...

Clothing Retailing - Europe

“We know that online is changing the nature of clothing retailing, but it is less clear just how much and whether what we are seeing in the best developed online countries, notably the UK, will be followed elsewhere in Europe. We think that it will. Margins on branded ranges are ...

Clothing Retailing - Germany

“Spending on clothing grew 6.6% in 2017, but there is huge variation in the performance of the specialist retailers as many of the long-established players continue to struggle to fully understand how the shopping habits and demands of their customers have changed in recent years.”

– Thomas Slide ...

Clothing Retailing - Spain

“Clothing retailing is changing in Spain. At the head of the sector, Grupo Inditex continues to perform well, but there are newcomers both in-store (eg Primark) and online (Zalando, Privalia and Amazon) that are challenging the status quo. They are raising the stakes in clothing retailing and will make it ...

Coffee - China

“The blurring boundary between packaged coffee manufacturers and freshly-brew coffee retailers brings more uncertainties to the category, let along the ambitious ‘new retail’ players. Growing consumption frequency signifies that there is still space that coffee can stretch into in China. To drive premiumisation, clean label claims can be appealing.”

Consumers and Retail Banking - UK

“Open Banking sets a new framework for the Retail Banking landscape, with endless opportunities to develop the market. To capture consumers’ attention and engagement, it is necessary to first secure their trust. Established brands are in a privileged position in this sense, and would be wise to take the initiative ...

Consumers and the Economic Outlook - US

"The economy continues its slow and steady recovery, though economists are hesitant to say that it has officially recovered. While some consumers may be watching economic indicators, many are not, and even those who are may not see the direct effects on their daily lives. Overall, if consumers were already ...

Cooking Habits - Brazil

"Saving money is one of the main motivations for Brazilians to cook at home. As Brazil faces an unfavorable economic scenario, affordable prices may be an important attribute for products. In order to sustain the consumers' interest and preference, however, brands need to offer something else, such as convenience and ...

Domestic Tourism - UK

"UK holidays appear better protected than holidays abroad from the economic risks and potential travel problems of Brexit."

Facilities Management - UK

"The facilities management sector is strongly established in the UK, and growth should continue independent of economic fluctuations. However, the demise of Carillion and the difficulties of other companies are concentrating attention on selective bidding and advancing added value through technology."

– Terry Leggett, Senior Analyst

Gluten-free Foods - US

"Despite a decline in the number of gluten-free consumers, there is a generally positive opinion of gluten-free foods. Consumers consider the claim to indicate the product is healthy and beneficial to all, not solely those who have celiac disease or a gluten intolerance. The challenge for the category is in ...

Hábitos Culinários - Brazil

"Economizar é uma das principais motivações do brasileiro para preparar suas refeições em casa. Com o

Cooking Enthusiasts - US

"The share of the population identified as Cooking Enthusiasts has remained stable over the last three years, providing a solid base of consumers who cook at home regularly and enjoy it. However, enthusiasm among other segments is on the decline, as less of the population is defined as Conflicted Cooks ...

Current Accounts - Ireland

"Although there appears to be a high level of inertia when it comes to how consumers manage their current accounts – for instance, switching activity is rare and infrequent – there has nonetheless been a fairly dramatic change in terms of how consumers interact with their current account. Having emerged ...

European Retail Briefing - Europe

This month's European Retail Briefing includes:

Flavor Innovation on the Menu - US

"American diners now have access to an expansive range of flavors, dishes, and cuisines, reflective of the diverse and highly competitive foodservice market. However, while the most adventurous embrace innovative, trendy, and international flavors, the majority still tend to stick with familiar fare, at least most of the time. Opportunity ...

Grocery Multiples: Reconfiguring the Non-food Offer - UK

"Over the past five years pressure has been placed on the supermarket sector in the UK, with the rise of discounters, online and convenience stores taking away a traditional dependence on the larger store format. As such the traditional big four have had to readjust the formats of their larger ...

Health Insurance - US

"The health insurance industry is facing many challenges due to questions about the future of the

atual cenário econômico desfavorável, o preço pode ser uma porta de entrada de produtos e marcas para lista de compras do consumidor. Mas para manter o interesse e a preferência desse consumidor, a categoria ...

Hispanics and the Restaurant Decision Making Process - US

"Hispanics' dining out expenditures grew 23% from 2013-18 to reach an estimated \$75.4 billion. Still, their current share of total expenditures is a fraction of their population share relative to the total US. Several factors such as youth, disposable income, and lifestyle explain why Hispanics fall short. However, Hispanics ...

Hot and Cold Cereal - US

"The \$10.4 billion cereal category continues to be plagued with struggles, largely an impact of falling cold cereal segment sales. Yet, the category still enjoys nearly universal participation, suggesting that any attrition is in consumption frequency or volume, not overall category participation. Frequency can be strengthened though, by accentuating ...

Household Paper Products - China

"As a well-established category, the future development of the household paper market relies on the expansion of usage occasions and consumers' willingness to trade up. For example, there's potential to encourage more uses of kitchen paper in cooking and food preparation by capitalising on the healthy eating trend, such as ...

Ingredient Trends in Beauty - US

"The beauty market is very diverse with a wide array of product offerings that make one-size-fits-all marketing an impossible task. Ingredients are a way brands work together cross-category, with many brands looking to other segments (ie food, supplements) for inspiration. Specifically, younger women aged 18-24 exhibit heavy involvement in ingredient ...

Kitchens and Kitchen Furniture - UK

"Reasons why people refitted kitchens in the last three years include enlarging the kitchen (22%) and creating

Affordable Care Act (ACA). While consumer satisfaction with plans and doctors is high, the influx of technology into healthcare is forcing insurers to rethink their service and coverage models."

Home Improvement and Maintenance - US

"The home improvement and maintenance market benefits from a healthy economy and genuine interest in improving the home. As more consumers engage in discretionary projects to create a home that looks and feel like their own and works more efficiently, retailers will have a prime opportunity to engage and empower ...

House Building - UK

"The UK house building market maintained strong growth in 2018, rising 7.7% in value despite Brexit headwinds, inflation and continued pressure on the public sector. Growth remains underpinned by the private sector, which further benefitted from the Help to Buy scheme in the past year. The extension of this ...

Household Surface Cleaners - US

"The household surface cleaning market is characterized by slow growth and low innovation, but there is reason for optimism. Brands are beginning to trial new formulas and formats that will enhance convenience, health, safety and the consumer experience. The market needs to adapt to changing consumer lifestyles, where there is ...

Internet/Satellite Radio - Canada

"In a 2002 interview with The New York Times, legendary musician David Bowie predicted, "the absolute transformation of everything that we ever thought about music will take place within 10 years, and nothing is going to be able to stop it." He went on to say that, "music itself ...

Logistical Services - UK

"The logistical services sector is currently going through a period of digitalisation, with supply chain strategies undergoing changes or being completely overhauled to

more work surface (32%), illustrating the importance of the trend to create larger kitchens, often combined with eating areas. In turn, more time living in the kitchen encourages householders to invest in attractive ...

Long-haul vs Short-haul Holidays - UK

“More people are choosing to take multiple short breaks rather than one long holiday. As a result the outlook for the short-haul market is more positive than the long-haul sector, which is set to decline for the first time since 2012.”

Marketing to Moms - US

“The competition among brands to get moms’ attention is fierce. Only a small share of moms say they have the money to pay for everything their kids want to do, meaning brands have to put in a lot of effort to make it to the top of moms’ list. One ...

Marketing to University Students - China

“Today’s university students are more distinctive and have personality. They value diligence and excellence also an informal and laid-back attitude. They appear both very practical and spoiled. Professional/academic skills are proactively invested, as well as hobby and leisure activities. An average of 3.4 channels is utilized to showcase ...

Mobile Gaming - China

“More and more gamers are playing on mobile devices while the average playing time has increased slightly compared to last year. Consumers have more motivations to make in-game purchases than before and they tend to try variety of games. Therefore, increasing players’ retention rate and motivations for in-game purchases are ...

Perfumes - Brazil

“A categoria de perfumes no Brasil é uma das que mais cresce no país. Graças às movimentações constantes das marcas nacionais (que têm expandido seus canais de

meet the challenges of new demands. The effective and efficient use of logistics space will be vital in making the most of the growing customer trend for ...

Marketing Financial Services to Women - US

“While women’s financial needs are not very different from men’s, they do think about money somewhat differently. Many don’t feel comfortable with talking about it or learning how to manage it. Institutions and advisors need to find ways to reach out to women and send messages that resonate with them ...

Marketing to Parents - UK

“While there appears to be no end to the enthusiasm for social media bloggers and vloggers expressed by children and teens, parents are far less approving, exhibiting clear concerns over the influence these figures have over their children’s behaviour and on their mental and emotional wellbeing. As the marketing landscape ...

Mobile Device Apps - UK

“The mobile app market is continuing to expand, with the emphasis firmly on free downloads and subscription payments or microtransactions. Gaming dominates app revenues but there are strong opportunities for other sectors, with augmented reality developments in particular driving app innovations in social media and retail. While young people are ...

Mobile Gaming - UK

“Although it is possible that the app store model will face disruption from developers choosing to offer their products outside of established stores, revenue from games is expected to show strong growth and remain the dominant app category on mobile. In-game purchasing has remained an effective monetisation method, and has ...

Pizza - US

“While sales growth has been minimal for retail pizza, a strong uptick in 2018 provides an indication of the growth potential of the category. Continued

venda e trazido novas fragrâncias ao mercado) e o hábito cultural do brasileiro de se perfumar, as vendas desses produtos têm crescido. Porém ...

Renewable Energy - UK

“Renewables are set to continue to play an increasingly important role in UK electricity supply, although the deployment of more mature technologies, such as onshore wind and solar PV, has slowed considerably amid reduced government support. However, with the costs of these technologies rapidly falling, together with the development of ...

Seasonal Shopping (Spring/Summer) - UK

“The UK retail sector was boosted by a number of significant events during the 2018 spring and summer months. Not only did retailers benefit from the usual occasions like Easter, but The Royal Wedding and England’s FIFA World Cup performance gave consumers even more reasons to celebrate and spend. As ...

Shaving and Hair Removal - UK

“As both genders feel the pressure to be hair-free, facial and body hair removal rates have seen a rise, however, the category continues to show a decline in value with little in NPD encouraging people to trade up. The beard trend shows no evidence of waning in 2018 with the ...

Soft Drink Trends - China

“Consumers choose different types of soft drinks according to the drinking occasion, which is good news for manufacturers as they can differentiate their products based on the consumption occasion targeted. For innovation, products with minus claims such as low sugar or low calories are not enough to meet consumers’ demand ...

Spectator Sports - UK

improvements in flavor variety, quality, and healthfulness will help marketers and retailers take advantage of frozen and refrigerated pizza’s unique combination of convenience and fun ...

Restaurant Decision Making Process - US

“Restaurant industry sales are expected to grow in coming years as positive economic conditions spur increased consumer spending on AFH (away from home) dining. However, with consumers having more choices of where to dine, restaurants must emphasize convenience to capture dining dollars. In addition, operators must offer more than quality ...

Serviced Offices - UK

“As the flexible workspace sector continues to evolve, the hybrid model, where providers offer a mix of co-working spaces and private offices, is set to become more prevalent among serviced office providers.

The shift towards hybrid space reflects the eagerness of serviced office providers to target a wide range of ...

Skin Protection - US

“Adults recognize that sun exposure has a negative impact on the appearance of their skin, and the majority of adults use sunscreen, tanning products, or sunless tanners. However, the category continues to be challenged by seasonal use. Industry players are further challenged by competing personal care products that offer sun ...

Solo Holidays - UK

“Independent solo travellers are freedom-lovers who feel most at home in cities. Brands can attract this self-reliant tribe by providing services, creating spaces and utilising technology to inform, reassure and connect solo travellers to each other and to local residents.”

Sportswear Retailing - China

"The cost of attending live sport events can be a barrier for some, even though the atmosphere is generally agreed to be far superior to watching sports in other ways. Venues are using technology to enhance the customer experience so this will help give fans more of an incentive to ...

Still, Sparkling and Fortified Wine - UK

"In a market where many shoppers are focused on buying what is on special offer and consumers typically drink from a narrow repertoire of wine types, wine festivals can help to prompt people to buy more wine and encourage greater experimentation. These should include samplings and suggestions on wines people ...

Suncare and Pollution Protection Products - China

"Higher usage frequency is driving the sunscreen market to grow after the category is widely penetrated, thanks to its association with anti-aging that has encouraged a third of respondents to use it all year round to fight against aging skin. The prevention mindset can also be enhanced in the delivery ...

The Private Label Household Care Consumer - UK

"The success of own-label has been underpinned by a perceived improvement in quality in recent years, helping to drive people towards these products even despite the amount of discounting on big name brands. This is raising expectations, which suggests that continued NPD is likely to be crucial to its future ...

Traditional Toys and Games - US

"Toys and games remain very relevant to consumers, but while gifting – especially for children – drives sales, many are shopping the category for other reasons, including for adult recipients. Where and how most consumers fulfill their toy purchases remains in flux, with competitive changes impacting the category and providing ...

"A lack of interest in sports participation used to drag the sportswear market, but consumers' increased attention to adopting a healthy lifestyle is expected to bring the market continuous growth. Facing more fashion and retailers' brands entering the market, specialised brands need to reinforce their strength on functionality."

- Yihe Huang ...

Streaming Audio - US

"The competitive landscape for streaming audio is fairly level in terms of service offerings, but a few standouts have dominated through partnerships with other services and easy access to extensive libraries. Paid streaming apps likely find that their biggest competition is the free version they offer – finding ways to ...

The Football Industry - UK

"Fan preferences for the big-screen experience of television mean football's first OTT (over-the-top) streaming services will change what we watch rather than how we do so."

– David Walmsley, Senior Leisure Analyst

The Role of Trust in Financial Services - UK

"Most people trust their financial providers to treat them fairly, but perceptions of the industry in general show that concerns over misconduct still linger. Improving communications and being more transparent in terms and conditions would be a good place to start improving this."

UK Retail Briefing - UK

This month's UK Retail briefing includes:

Underwater Tourism - Europe

“Often known as the ‘rainforests of the sea’, some of the world’s most spectacular and fascinating landscapes can be found underwater on coral reefs, which account for just 0.1% of the seabed yet support 25% of all marine life. Wrecks and reefs are common destinations for a global community ...

Unsecured Lending - Canada

“The increased use of alternative credit scoring models is likely to facilitate disruption in the lending space and bring more borrowers into the financial mainstream.”

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

Yogurt and Yogurt Drinks - US

“Total sales of yogurt are flat; consumers are trying new yogurt styles and brands but not increasing their total yogurt consumption. While sales of drinkable yogurt are quickly growing they have not offset the decline of spoonable yogurt. Moreover, drinkable yogurts are likely cannibalizing sales of spoonable. High protein/low ...

家用纸制品 - China

“作为一个发展完善的品类，家用纸制品市场的未来发展依赖于使用场合的拓展和消费者的消费升级意愿。比如，可以利用健康饮食趋势鼓励消费者在烹饪及准备食物时使用厨房纸，如用于吸收食物中过多的油脂；也可以在包装和选材上创新，给消费者提供便利和附加价值。”

– **李玉梅, 高级研究分析师**

软饮料趋势 - China

“消费者会根据不同的消费场合选择不同类型的软饮料，这对制造商而言是好消息，因为它们可以根据锁定的消费场合将产品差异化。从创新角度来看，有低糖或低卡等减少含量的宣称的产品不足以迎合消费者对健康的需求。营养价值不论是天然还是额外添加，都是让消费者对新产品感兴趣的一个关键。提神等附加功效则是让企业在市场竞争里领先的另一个关键。”

– **李梦, 研究副总监, 食品和饮料**

Unprocessed Poultry and Red Meat - UK

“Openness to recipe suggestions probably offers the simplest way to encourage consumers to experiment with different types of meat to widen their repertoire. This would also tap into their love of cooking and willingness to try something new. Recipe suggestions could also help to drive awareness of cheaper cuts, breaking ...

Water Filtration - US

“Despite widespread media coverage of lead and other contaminants found in tap water, the water filtration market experienced a decline of 0.2% from 2017, reaching \$827 million in estimated 2018 retail sales. Market struggles can be attributed to higher ownership of dispensers built into the refrigerator, positive perceptions toward ...

咖啡 - China

“包装咖啡生产商和现冲咖啡零售商之间的界限日益模糊，为该品类带来更多不确定因素——更不用说雄心勃勃的‘新零售’品牌了。不断提高的饮用频率意味着咖啡在中国市场仍有发展空间。清洁标签对消费者有吸引力，是带动高端化的一大特征。”

– **李梦, 研究副总监, 食品和饮料**

移动游戏 - China

“越来越多玩家在移动设备上玩游戏，与去年相比，玩游戏平均时间略有增加。消费者游戏内购的动力较以往有所增加，他们倾向于尝试各种游戏。因此，提高玩家留存率和游戏内购动力对一款游戏的成功至关重要。”

– **周同, 研究分析师**

运动服装零售 - China

“缺乏参与体育运动的兴趣曾拖缓运动服装市场的发展，但消费者日益注重践行健康的生活方式有望带动市场持续增长。面对更多的时尚和零售商品品牌进入市场，专业品牌需要强化其功能优势。”

– **黄一鹤, 研究分析师**

针对大学生的营销 - China

“如今的大学生更特立独行，有自己的个性。他们信奉勤奋和卓越，同时也崇尚不拘而悠闲的态度。他们看起来既很现实，又很娇惯。他们积极在专业/学术技能上投资，也在爱好和娱乐活动上投入。他们平均使用3.4种渠道展示自己的爱好，方式富有创意，希望启发他人。拥有社交功能和深刻同理心的产品和服务会赢得这些年轻人的青睐。”

— 赵鑫宇，初级研究分析师

防晒和抗污染产品 - China

“防晒产品市场普遍饱和，较高的使用频率是带动该市场增长的驱动力。防晒产品与抗衰老的联系密切，这促使三分之一的被访者全年使用防晒产品以应对肌肤老化问题。多数被访城市消费者认识到了使用抗污染产品的必要性，但缺少相关知识来判断产品是否有效。因此，品牌可更进一步从强调预防的角度切入，推广抗污染产品。”

— 金乔颖，研究副总监