

July 2018

### Air Care - UK

“More people than ever are using air care products, with the category benefiting from meeting both emotional and functional needs. However, concerns over the content of standard fresheners look to have encouraged some consumers to re-evaluate their product choices. Innovation is continuing to rise, ensuring the category remains fresh and ...

### Attitudes towards Comfort Foods - China

“There is a good opportunity for comfort food in China as Mintel research shows using foods to adjust the mood is a widely recognised practice by Chinese consumers and there is a wide acknowledge of the impact of food on people’s mood. Businesses, especially snack brands, can communicate on the ...

### Attitudes towards Fashion - China

“Fashion items have always been viewed as the demonstration of a person’s personality, taste and status. People now also care about how they purchase fashion because they want to feel smart, relaxed and fun in the process. Despite the fast-growing e-commerce market, in-store services and interaction with store clerks are ...

### Beer - Brazil

“The economic uncertainty and the concerns about the quality of the products impose some challenges to the beer market. Brands need to differentiate themselves and meet the consumers’ demands in a segmented way – by consumption occasion or type of customer. In addition, it’s important to offer higher-value-added products in ...

### Brand Overview: Finance - UK

“There is a substantial difference between perception and reality within the financial services sector. Users of brands tend to be happy with their bank, for example,

### Attitudes toward Corporate Social Responsibility - US

“In today’s highly polarized times, consumers increasingly want to know that they share consistent values with the companies they purchase from. As a result, CSR (corporate social responsibility) programs have grown far beyond token charitable initiatives and in some cases are completely reshaping how companies do business. The challenges are ...

### Attitudes towards Cooking in the Home - UK

“People’s preference for cooking over prepared meals, and for meals which are quick and easy to prepare, fuels considerable demand for products offering shortcuts to preparing/cooking meals. Home cooks are also looking for more meal inspiration when doing their grocery shopping, and retailers can help here through offering more ...

### Australia & New Zealand Outbound - Australia

“Destinations worldwide recognise that Australians and New Zealanders tend to be curious and engaged travellers who do not rush back home and are proven high spenders while on vacation.”

– Jessica Kelly, Senior Tourism Analyst

### Black Consumers and the Car Purchasing Process - US

“Buying a car can be a stressful process for Black consumers, because they are singularly focused on ensuring that they negotiate the best deal that maximizes car value within their budget. Gathering as much information as possible on car attributes, performance, and most importantly price helps to alleviate concerns for ...

### Breakfast Eating Habits - UK

“Breakfast habits are becoming more fragmented. Busy lifestyles are seeing people skip this important meal, eat it on the go or graze their way through the morning,

but seem unconvinced about the merits of those they have not used. In insurance markets, the financial incentive to switch is enough to get ...

## Breakfast Foods - US

"Boosting the importance of breakfast is in order. Only about half of US adults think breakfast is more important than lunch or dinner, down from 2014, and less than half say it sets the tone for their day. Nevertheless, consumption is high. Opportunity for portable options is strong, with few ...

## Business Traveller - UK

"Businesses are cutting back on travel in light of uncertainty surrounding Brexit and the impact of a weak pound. Airline GDS fees and new GDPR regulations are also making life more difficult for British-based companies. However, there are opportunities for larger TMCs to develop products that help businesses save money ...

## Car Hire - China

"Chinese consumers rent cars mostly for domestic self-drive tour and visiting family or friends. Consumers with a high income tend to rent for self-drive tour and the low income group like to rent for visiting family or friends. Males aged 30+ usually use B2C platforms for a specific and personalised ...

## Cars and Commercial Vehicles - UK

"The cars and commercial vehicle market contracted in 2017 amidst political and economic uncertainty and the decline of diesel. This followed two years of bumper sales and production. Last year's slump was underpinned by low domestic demand, which fell in line with wavering business and consumer confidence.

Nonetheless, there remain ...

## Cerveja - Brazil

"Diante de um cenário econômico pouco favorável e de um consumidor brasileiro que mostra maior

fuelling demand for convenient products that can be eaten quickly and easily. Meanwhile, when time permits, brunch offers an attractive opportunity for people ...

## Bridging Loans - UK

"Despite uncertain progress in Brexit negotiations, several stagnant economic growth indicators, and potential interest rate rises over the next year, the industry has performed well in a difficult environment. Whilst some lenders have left the market, others have entered and continue to adapt and cater to borrowers' specific funding needs ...

## Buying Online: Understanding Why Consumers Sometimes Don't - US

"Shoppers of all ages and demographics are growing more comfortable buying products online, with 97% of all adults engaging in some online shopping over the past 12 months and one third shopping online at least once a week. With online sales growth consistently outpacing overall retail sales growth and consumers ...

## Car Rentals - US

"The car rental industry is a nearly \$30 billion industry in the United States, providing rental cars to consumers across the country. Car rental agencies thrive in the travel industry, where they provide vehicles to consumers in places or situations where they may not have access to a vehicle. Thus ...

## Ceramic Tiles - UK

"The UK is an unusual market by European standards due to the predominance of wall tiles, but attitudes to ceramic tiles for flooring are changing, stimulated by the emergence of wet rooms and some use outside the traditional areas of kitchens and bathrooms. Per capita consumption of tiles is, however ...

## Children's Attitudes towards Saving - UK

preocupação com a qualidade dos produtos, o desafio das marcas será encontrar maneiras de se diferenciar atendendo às preferências do consumidor de maneira segmentada, seja por ocasião de consumo ou por perfil de consumo, visando ...

## Coffee - US

"The \$14.4 billion coffee market continues on a positive path in 2018, buoyed by a thriving RTD (ready-to-drink) coffee segment and sustained growth in single-serve formats. Millennials show strong category engagement, consuming a range of coffee products and show strong interest in innovative offerings, including RTD coffees with new ...

## Color Cosmetics - Brazil

"The category of color cosmetics has several opportunities to innovate in Brazil, offering different formats, textures, and claims. In addition, new technologies have changed the market, thus brands have tried to adapt by offering augmented reality apps, developing marketing actions via social media and appealing to minority groups."

## Commercial Mortgages - UK

"Commercial borrowing levels recovered in 2017, bolstered by a strong second half of the year, as the market displayed resilience a year on from the lull that followed the EU referendum. This growth came as a surprise to many in the industry given the climate of uncertainty, with fears that ...

## Consumer Attitudes towards Credit Products - UK

"Slower annual growth in lending signals a fall in demand, as concern around the potential impact of rising interest rates grows. But, affordability constraints will still make it difficult for many people to clear their debt and significantly reduce their borrowing. Open Banking gives lenders an opportunity to develop tools ...

## Consumers and Financial Advice - UK

"Despite parents' commitment to save, a decade of low interest rates, regulatory interventions and limited developments in the market has reduced the appeal of child-specific products. The recent rate rise and digital innovations mean there are now plenty of opportunities for providers to shake things up and offer something different ...

## Coffee and Tea on Premise - US

"The foodservice coffee market is highly competitive and many large coffee brands are starting to experience a slowdown in sales due to saturation. However, the incidence of consumers buying coffee away from home has grown, with increased consumption coming from new drink trial. The future of the foodservice market will ...

## Color Cosmetics - US

"Despite a slowdown, color cosmetics continues to post growth, with facial cosmetics still commanding the highest consumer spend. The popularity of the no-makeup look continues to be on-trend, with consumers seeking skincare-based formulas to boost radiance. Lastly, Black women are a key market, as the inclusivity movement encourages product trial ...

## Connected Living - Smart Home and Integrated Devices - Canada

"The majority of Canadian consumers are interested in making their home more 'connected' by using smart devices. The growing desire by the consumer for convenience, knowledge of device/appliance energy consumption, security and energy and money savings will support the progression of the smart home market. Many factors such as ...

## Consumer Snacking Habits - Ireland

"While consumers are increasingly looking for snacks to be healthier, three quarters of consumers noted that they worry that snacks that claim to be healthy may be high in sugar, fat or salt. This points to a stronger need for snack companies to be transparent regarding the nutritional contents of ...

## Consumers and the Economic Outlook - US

"New regulations have caused compliance headaches for advisers, but moves to increase transparency and provide clarity over what services are provided by financial advisers should be embraced and used to better highlight the benefits of advice."

– **Rich Shepherd, Senior Financial Services Analyst**

## Credit Cards - US

"The credit card industry is a mature one and competition for new customers is fierce. Issuers have to find ways to make their card stand out from the others or risk moving down from the top of their customers' wallets. Since growth will come primarily from young people, issuers have ...

## Delivery Services and Meal Kits - Canada

"By most accounts, meal kits represent an opportunity for future growth. Nevertheless, hurdles exist. One is cost and another is an increasingly competitive market as more start-ups, retailers, and consumer packaged goods companies enter the space. Recognizing opportunity, there is a push to get a foot-hold in this market. The ...

## Digestive Health - US

In 2018, total US retail sales for the digestive health market are expected to exceed \$4.9 billion, following slight increases since 2016. The market did increase 11.7% between 2013 and 2018, largely attributable to Rx-to-OTC transitions in the antacid segment early in the review period. However, no new ...

## Domiciliary Care - UK

"Independent care providers are already well-established in the market and are expected to offer services to those with 'substantial' care needs, as well as all other care clients. However, the ever-widening gap between the fees paid by LAs and the actual cost of service provision means some providers could refuse ...

## Events Tourism - Ireland

"Consumers remain confident in their financial health and anticipate little change in the coming year, resulting in stable patterns of financial opinions and behaviors. Consumers hope to save for the future while also maintaining spending levels that accommodate their current lifestyle. This Report looks at the role credit score plays ...

## Current Accounts - UK

"The Open Banking initiative, which launched in January 2018, has the potential to massively increase competition in the market. To realise this, however, providers and regulators need to convince consumers of the benefits of opting-in, while product innovation needs to be developed with customer needs in mind."

- **Douglas Kitchen, Financial ...**

## Desktop, Laptop and Tablet Computers - UK

"Despite continuing declines in the desktop, laptop and tablet market, the laptop segment has fared better because smartphones and tablets remain less suitable for performing productive tasks. It is hoped that cellular devices and two-in-one laptops will appeal to consumer desire for ultra-portability, and these devices offer a decisive upgrade ...

## Digital Trends Quarterly: Online Reviews - UK

"Despite increasing concerns about misuse of user reviews by companies – for example commissioning fake positive reviews about themselves or negative reviews about their competitors – people still see them as more reliable than professional reviews, as well as more impartial and more useful. However, professional reviews still trump user ...

## European Retail Briefing - Europe

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

## Financial Literacy - Canada

“The events market in Ireland has experienced significant growth in recent years which is projected to continue but with safety concerns and secondary ticketing sites driving up ticket prices, event organisers are under more pressure to deliver on the ‘experience’ factor.”

– **Brian O'Connor, Senior Consumer Analyst**

## Footwear Retailing - UK

“The footwear market is continuing to grow, but this growth is predicted to slow down over the next few years as the implementation of Brexit will undoubtedly create more uncertainty. Once again we see that men’s footwear is driving growth in the sector as the popularity of trainers is yet ...

## Full Service Restaurants - Ireland

“The full-service restaurant sector in Ireland is growing as consumers are eating out on a regular basis given their busy lifestyles and the demand for convenience. Development and innovation in the restaurant industry is driven by consumers’ search for healthy, vegan and locally sourced food, as well the increasing popularity ...

## Grilling and Barbecuing - US

“Most adults are grill owners; a substantial 79% of adults currently own a grill and 32% plan to buy a grill in the next year. Flavor is a top motivator to grill, followed by convenience, enjoyment while entertaining, and relaxation. Since 2013, the market has been driven by an improving ...

## Health and Fitness Clubs - UK

“Operators need to embrace technology but remember that this is no substitute for personal interaction. Personal trainers and gym staff are a brand’s strongest asset. Affordability of personal training can be addressed, while using online channels to build rapport with customers can help overcome barriers to interaction.”

– **Helen ...**

## Holiday Booking Process - China

“A concerted effort from government, industry, the school systems and the general public is required to improve the financial literacy of Canadians as its importance has perhaps not sufficiently caught on in the public consciousness.”

## Frequent Travel Programs - US

“A strong economy encourages people to spend on travel. With many tools available to help consumers find the lowest prices, travel providers lean on their loyalty programs to build crucial brand loyalty. These programs must innovate in order to maximize their effectiveness in the face of changing traveler habits and ...

## Furniture Retailing - UK

“Consumer spending on furniture continues to grow, but it’s a fragmented and challenging sector to operate in. Physical stores remain a vital part of the purchase journey but growth in digital capabilities has fundamentally changed the way they’re used and the in-store experience needs to be adapted to reflect this ...

## Grocery Retailing - US

“The grocery industry will become \$700+ billion strong within the next five years. During this time, it’s likely that additional mergers and acquisitions will occur as competition inside and outside the industry (eg from restaurants) intensifies. While consumers’ grocery shopping behaviors may be rather status quo for now, this will ...

## Hispanics and the Car Purchasing Process - US

“Since the majority of Hispanics plan to purchase a car within the next three years, they are constantly gathering information about the vehicles they would like. Most of this research is conducted online and through the recommendations or influence from friends and family. However, the experience at the dealer is ...

## In-car Electronics: Entertainment, Navigation and Audio - Canada

“Chinese travellers are increasingly mature on holiday planning and booking – most of them take main responsibility and book increasingly early. To deal with such changes, official selling channels need to know them better and promote early, accommodations could seek for playing a more important role in the whole holiday ...

## Laundry and Fabric Care - China

“Concentrated laundry liquid has the potential for greater penetration in China, but more education is needed for consumers. This is a saturated market starts and so opportunities lie in catering to niche demands such as specialised fabric care and baby laundry products. Proving safety credentials in terms of dermatological claims ...

## Maquiagem e Esmalte para Unhas - Brazil

“A categoria de maquiagem e esmalte para unhas tem diversas oportunidades para inovar no Brasil, com formatos, texturas e posicionamentos diferentes. Além disso, as novas tecnologias estão mudando o cenário atual, e as marcas estão tendo que acompanhar essa tendência com aplicativos de realidade aumentada, comunicações cada vez mais interessantes ...

## Men's Facial Skincare - UK

“The market decline continues as men shrink their skincare regimes. While they look to brands they know to give them affordable options and educate them, big manufacturers are concentrated elsewhere – leaving smaller male-specific brands room to flourish. The advertising narrative needs to appeal to new priorities among men, while ...

## Online Retailing - Europe

“Online is growing fast and it will continue to do so. It is still immature, even in the more developed countries, such as the UK and Germany, and in many sectors, especially fashion, the established store-based players have yet to mount an effective counter attack. But the example ...

## Online Retailing - Germany

“As the wave of technological advancement and connectivity has made its way into the automotive industry, it is important to take stock of what role they play in the market. From the perspective of automakers, the value of in-car electronics is in their ability to influence purchases – whether to ...

## Lifestage Marketing in Financial Services - US

“There are many ways to define a lifestage, including by age, marital status, or parental status. The financial needs of each lifestage are unique and financial institutions are always seeking ways to customize products and services to appeal to each one. While the recent recession affected everyone, it may have ...

## Medicated Skincare - US

“The medicated skincare market grew by 0.4% in 2017 and will reach an estimated \$1.1 billion in 2018; an increase of just \$14 million. Through 2023, Mintel estimates that the market will add between 1% and 3% per annum. Better prevention, oral medications, and non-medicated products will continue ...

## Nuts and Dried Fruits - China

“Nuts are welcomed by consumers because of their healthy and tasty image, however more diversified flavours of nuts are needed in the market. The dried fruits category is likely to benefit from freeze-drying technology, which adds a crispiness which is currently seen as premium. The future of nuts and dried ...

## Online Retailing - France

“Online retailing in France is generally at a medium stage of development, behind the countries of northern Europe, but ahead of those in the south. Amazon dominates, but less so than in most other countries, due to relatively strong propositions from domestic retailers. The next area of growth will ...

## Online Retailing - Italy

“German e-commerce has continued to experience strong growth but it is dominated by the pureplayers and is skewed heavily towards particularly product categories. While the clothing and electrical sectors are now well-established online, other categories, including food, remain remarkably underdeveloped, providing the potential for further growth in the future.”

## Online Retailing - Spain

“Online retailing in Spain lags behind development in, for example, Germany or the UK, but it has all the key elements already in place. There is an online grocery retailing sector, which is becoming well established, led by Mercadona. Fashion is successful online and is led by Zara ...

## Online Shopping - Canada

“Despite the fact that virtually all Canadians are shopping online, consumers continue to be more reliant on shopping in-store rather than over the internet. With few consumers saying that the bulk of purchases were made online in the past year, Canadians are likely to be approaching online shopping with a ...

## OTC Analgesics and Cold and Flu Remedies - UK

“The British population is facing a health crisis – it is getting older, more overweight and a growing culture of ‘presenteeism’ is resulting in many employees placing additional stress and strain on their bodies when rest and recuperation is what’s needed. The OTC analgesics and cold and flu remedies market ...

## Patio and Backyard Living - US

“Outdoor spaces are perceived as places of relaxation for most adults. Although outdoor décor is influenced by DIY culture and personalization, most consumers seek functionality over style or flair. The market continues to grow as advancements in comfort and durability keep outdoor improvements in the peripheral view of most adults ...

## Pet Food - US

“Online retailing in Italy lags behind the UK and Germany, but it is developing rapidly as more people get online and barriers, such as unreliable delivery and low credit card ownership, are overcome. Once people are online they appear to be keen shoppers – the mobile sector is particularly important ...

## Online Retailing - UK

“The growth in online retailing, at present, continues unabated. It is still a relatively young channel, accounting for a sixth of all retail sales in the UK, with much room to grow particularly in some categories, notable grocery. Awareness of its growth and the impact this is having on the ...

## Oral Care - UK

“In a sector where growth has ground to a halt, and is expected to remain flat for some time, oral care brands need to engage consumers more with their dental health and reduce reliance on special offers if they are to see value return. More standardised help and guidance in ...

## Packaged Bread - US

“Participation is rather steadfast which is proving to be a help and a hindrance to performance in the \$21 billion packaged bread category. Sales have remained modestly positive despite the lingering popularity of low carb diets, yet the bulk of consumers are stuck in a holding pattern – neither increasing ...

## Personal Investment Products - China

“Investors who have an annual household income of over RMB 500,000 are actually not that different from general consumers in terms of investment experience and preferred products. They are pretty mainstream. High risk high return product preferers tend to be those who have a high educational background or 40-49-year-olds ...

## Ready Meals and Ready-to-Cook Foods - UK

"The pet food market continues to grow at a slow, steady pace, driven by premiumization and treating as pet owners look to give their pets, viewed as cherished members of the family, the best. Increasingly, pet owners are looking for pet food and treats that measure up to their own ...

## Regional Newspapers - UK

"Regional/local newspapers continue to struggle within the digital world, with media platforms such as Facebook and Google set up to favour national titles. The Cairncross Review, to be published in early 2019, indicates that there will be far greater government involvement in supporting the industry, through subsidies or regulation ...

## Short and City Breaks - UK

"There is growing potential for 'me-time' holidays that allow travellers to pursue their personal interests. These could be trips that enable those in couples to have a short break away from their partner or family in the company of friends, or even by themselves."

– **John Worthington, Senior Analyst**

## The Magazine Reader - US

"The plight of print publications in the 21st century has been much publicized, and remains ongoing. Total print and digital copies sold fell from 2010-17, and as a result, ad sales have fallen. However, there remain bright spots for the industry, including the successful emergence of digital brands that offer ...

## Wedding/Honeymoon Tourism Worldwide - International

"Due to the fact that a destination wedding is a 'one-stop shop' – ie everything from the officiant to the flowers can be arranged by a hotel or a resort – the burden of organising the event falls on the venue, rather than on the couple. Depending on the range ...

## Women's Facial Skincare - UK

"The women's facial skincare category has seen strong value growth year-on year despite a decline in NPD, suggesting that advertising and marketing messages are resonating with women. Penetration of products has

"The influx of premium launches has underpinned the strong growth in the market, while NPD in healthy ready meals has also tapped into the overarching health trend. The return of salt to media headlines, however, will ramp up pressure on companies to try to reduce the salt content of products ...

## Shopping for Home Décor - US

"The home décor market is expected to grow, thanks to healthy market factors and a genuine interest in decor, supported by the housing market and a retailer emphasis on the category. Although many consumers seem to enjoy shopping for décor, not always requiring a specific reason to shop, they're changing ...

## Tea and Other Hot Drinks - UK

"While Britons continue to live up to their reputation of being a nation of tea drinkers, volume sales for ordinary teabags, which dominate the market, are down, the competition from coffee and soft drinks eroding sales. While ordinary teabags remain their core offering, operators are developing their mix of products ...

## UK Retail Briefing - UK

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

## Whole-of-Life Insurance - UK

"The whole-of-life market has experienced a difficult period over the past five years but there are signs that this may be coming to an end. A large portion of over-50s have little in the way of savings, providing an opportunity for insurers to provide a cheap route to providing security ...

## Yogurt and Yogurt Drinks - UK

"Environmentally friendly products such as with recycled packaging or sustainable farming guarantees attract strong consumer interest but are underexplored within the category. The public focus on plastic's impact

increased in the last 12 months, indicating that women are adding multiple steps to their regime. However, there are ...

## 个人金融投资产品 - China

“在投资经验和产品偏好上，家庭年收入500,000元人民币以上的投资者和普通投资者并没有太大差异。他们其实属于主流投资者。那些高风险高收益产品偏好者往往是高学历或一线城市的40-49岁投资者。他们似乎对其未来的财务状况充满信心，因此在投资中更大胆和激进。”

— 过人，研究副总监

## 坚果和干果 - China

“坚果享有健康美味的形象，大受消费者欢迎，但市场上坚果产品的口味有待多元化。干果品类可能会受益于冻干技术的发展，酥脆口感度进一步提高，而酥脆的口感是目前消费者眼中高端的产品特征。坚果和干果品类未来发展的关键在于让产品变得既健康又纵享。”

— 刘唱，研究分析师

## 对时尚的态度 - China

“一直以来，时尚产品被视为个性、品味和地位的展现。当今消费者也重视时尚产品的购买过程，因为他们喜欢探索购物的精明之道，享受购物带来的轻松和趣味。尽管电商市场飞速发展，实体店服务和店员与顾客的互动对于赢得消费者对品牌的好感并引导其购买决策发挥着至关重要的作用。”

## 衣物洗护用品 - China

“浓缩洗衣液在中国有潜力实现更高渗透率，但需要更加强消费者教育。该市场已经趋于成熟，因此机会来自迎合小众需求（如婴儿专用衣物洗护产品）。有利于皮肤的产品宣称将是提高消费者信赖、带动销售额的有效方法。”

— 周文棋，研究分析师

on the environment makes such packaging innovation timely. Meanwhile sustainable farming guarantees allow companies to boost their image as socially responsible.”

...

## 假日预订流程 - China

“中国游客在假日规划和预订上日趋成熟——大多数承担起主要责任，且预订越来越早。为了应对这一转变，官方销售渠道需要更深入地了解他们，更早地营销促销；住宿可以寻求在整个假日体验中扮演更重要的角色；线下渠道则可以借用‘新零售’的概念。”

— 黄一鹤，研究分析师

## 对慰藉食物的态度 - China

“慰藉食物在中国市场大有发展良机，因为英敏特调查显示，中国消费者普遍会通过吃东西调节心情并了解食物对心情的影响。品牌（尤其是零食品牌）可从调节心情的功效角度出发吸引消费者，提高品牌知名度。”

— 李梦，研究副总监，食品和饮料

## 汽车租赁 - China

“中国消费者主要因国内自驾游和探亲访友租车。高收入消费者倾向租车自驾游，低收入群体则更可能因拜访亲友而租车。30岁以上的男性通常使用B2C平台以获得特定的个性化租车体验；20-24岁女性则向代理平台寻求一站式方案。消费者希望租车顺畅，即租赁手续简单、取车和还车地点便利。”

— 周同，研究分析师