

## December 2020

### Accommodation - Ireland

“COVID-19 has taken a heavy toll on Irish accommodation providers, with revenue estimated to have more than halved between 2019 and 2020. Consumer anxiety with regard to the virus is seeing many become skittish about booking future accommodation.”

- **Brian O’Connor, Senior Consumer Analyst**

### Atitudes e Hábitos em Relação a Mídias Sociais: Incluindo Impacto da COVID-19 - Brazil

“As redes sociais foram de extrema importância para os brasileiros em 2020, especialmente durante os meses mais rígidos de distanciamento social. Através delas seus usuários puderam manter contato com entes queridos, consumir e produzir conteúdos de entretenimento, realizar compras com maior facilidade, se informar e se conectar com causas, etc ...

### Attitudes Toward Healthy Eating: Incl Impact of COVID-19 - Canada

“The pandemic has vastly impacted the physical context surrounding eating – everything from where we are eating, to when, why or how often we are eating, even to who we are eating with. But we know that managing a healthy lifestyle has always been about balancing aspirational goals against realistic ...

### Attitudes towards Insurance: Incl Impact of COVID-19 - Canada

“The impact of COVID-19 has been more strongly felt on the distribution side through increased digital use and virtual care while its impact on insurance product sales has not been significant. Going forward, this openness to higher digital usage is expected to continue as more digital non-natives get comfortable with ...

### B2B Economic Outlook: Inc Impact of COVID-19 - UK

### Airlines: Incl Impact of COVID-19 - US

“Airlines suffered a lot of financial damage due to the COVID-19 pandemic, and recovery will be neither quick nor simple. Canny airlines will be able to recognize the most important flying demographics at each point of the long recovery, and appeal to their sensibilities in order to maximize their spending ...

### Attitudes and Habits on Social Media: Incl Impact of COVID-19 - Brazil

“Social media channels were extremely important for Brazilians in 2020, especially during the toughest months of social isolation. Thanks to social media, users were able to keep in touch with loved ones, consume and produce entertainment content, make purchases with greater ease, get informed and connect with social causes, among ...

### Attitudes towards Cooking in the Home: Inc Impact of COVID-19 - UK

“The COVID-19/coronavirus outbreak has meant people have found themselves cooking at home more, some out of necessity and some thanks to having more time in their day. Many have developed new skills and there’s marked appetite among many consumers for retaining these habits. Despite this, ease and speed of ...

### Auto Market Beat - Q4 - China

“The sales volume showed growth of over 8% in Q4 2020 compared to Q4 2019. The year-end rise effect was truly significant. The sales volume of passenger cars in 2020 experienced a smaller decline than 2019, as the rigid demand for car usage and the recovery of consumer confidence in ...

### Baby Nutrition - China

“Although continuing to face a declining birth rate, the total baby nutrition market still maintains steady

“The economic impact of COVID-19 has been severe and widespread, though the effect on the separate sectors of the economy has been highly varied. With the vaccination roll-out having commenced in December 2020 the prospects for economic recovery gathering pace during 2021 have improved, though the first half of the ...

## **Bakery: Incl Impact of COVID-19 - Brazil**

“Brazil’s bakery products market has been positively affected by the COVID-19 pandemic, as even in the face of an economic crisis, consumers have continued to consume breads and baked goods. Healthiness is the main trend impacting the sector, generating opportunities for fortified products that contain added benefits and are free ...

## **Beauty Influencers - China**

“As Chinese consumers’ purchase journeys become more complex, the influence landscape is also becoming fragmented. While traditional influencer marketing will remain important to drive brand awareness and sales, issues surrounding authenticity and diversity could signal future challenges. To alleviate these concerns, beauty campaigns could feature more real consumers to leverage ...

## **Black Consumers and Alcoholic Beverages - Spotlight on Spirits: Incl Impact of COVID-19 - US**

“Alcohol consumption at home is all about the expected experience – the taste of their drink that they want for that exact moment and desired mood. Wine is Black consumers’ go-to alcoholic drink; spirits are their secondary, “also drink” choice. For some consumers, spirits are a style accessory that represents ...

## **Cannabis on the Menu: Incl Impact of COVID-19 - US**

“COVID-19, legal restrictions and consumer unfamiliarity make cannabis on the menu a tricky and somewhat risky business. Dispensaries and other cannabis-focused establishments are currently the safest bet, though these establishments still need to pay careful attention to local licensing in order to remain legally compliant. The good news is that ...

growth, mostly driven by premiumisation in IMF as well as increasing penetration of baby supplementary foods and baby health supplements. Opportunities lie in interactive marketing education for cutting-edge IMF formulae, category expansion to offer ...

## **Beauty Consumers in Lower Tier Cities - China**

“Although they widely use online information channels, lower tier city consumers have more trust in ‘ordinary people’. They are active users of online shopping channels but have widespread distrust about the authenticity of products bought online. Many are using essence/serum in addition to toner, lotion and cream, but there ...

## **Beer - China**

“A slight pickup in retail volume is attributed to COVID-19, which has bred in-home beer drinking. However, the market’s long-term growth will be driven by premiumisation and the good news is that consumers are willing to splurge on beer made from quality malt and hops. In addition to product upgrades ...

## **Brand Leaders: Inc Impact of COVID-19 - UK**

“The COVID-19 crisis and the consumer response underlines the purpose of creating a strong brand image. The trust in big name brands has drawn consumers towards them at a time when consumers have been looking for reassurance. In household care for example, which has seen a move towards effective and ...

## **Car Aftermarket - China**

“The growth momentum of the car aftermarket remains solid with the number of registered passenger cars predicted to exceed 220 million in 2020. Rising awareness of regular maintenance and interest in car modification are creating potential opportunities in the aftermarket as well. 4S stores remain strong in specialised repair, but ...

## Car Purchasing Process - China

"Only less than 40% car owners purchase their cars within the original budgets, while the majority pay extra for better configuration or upper models on car purchase. Such willingness to upgrade stays strong, as over 70% of surveyed car-owners state that upgrading is essential for the next car even under ...

## Cheese - China

"The cheese market will continue its growth trajectory as the fastest growing dairy category, albeit from a smaller base. Brands can expand the formats of cheese to place it in competition with the broadening snack category and target more adult consumers, rather than focusing purely on its nutritional value. Collaborations ...

## Cleaning in and Around the Home: Inc Impact of COVID-19 - UK

"Amidst the difficulties of the COVID-19 pandemic, household cleaning products have enjoyed a golden period. Consumers have been cleaning more to keep them safe from the deadly virus and in response to being at home more. However, once the vaccination program progresses and the threat dissipates later in 2021, cleaning ...

## Connection and Communication in a Digital Age: Incl Impact of COVID-19 - US

"Technology's role in communication today is driven largely by rapid improvements in personal device hardware (ie smartphones) and connectivity. New communication behaviors are emerging in this rapidly evolving category. Consumers have their option of email, phone call, social media, video chats and more to connect with others, but newer forms ...

## Consumers and General Insurance: Inc Impact of COVID-19 - UK

## Carbonated Soft Drinks: Inc Impact of COVID-19 - UK

"Emotion-led motivations to drink CSDs have come to the fore since the COVID-19 outbreak and will be pivotal in driving usage in its aftermath, with nostalgia helping to create a feel-good factor. Strengthening associations with emotional wellbeing, for example with ingredients linked to relaxation, will resonate. There are also more ...

## Clean Beauty: Incl Impact of COVID-19 - US

"Consumers buy clean products because they believe they are safer than traditional products, have higher quality ingredients and are better for the environment. In light of the COVID-19 pandemic, consumers are looking for ways to protect their health and safety – increasing demand for clean beauty and personal care products ...

## Commercial Borrowing: Inc Impact of COVID-19 - UK

"The financial effects and business disruption of the pandemic have challenged businesses and will continue to affect some for months and years ahead. While this is likely to lead to increased due diligence, risk aversion and some form of a slowdown in certain types of borrowing, it will also encourage ...

## Consumer Spending Sentiment - Q4 - China

"Significant economic indicators have rebounded thanks to the effective economic stimulus policies of the Chinese government. Guarded optimism is the main theme, as consumers still prioritize saving. However, their financial confidence has been significantly boosted. Many of them are happy to consume for self-indulgence to achieve a high quality lifestyle ...

## Contract Catering: Inc Impact of COVID-19 - UK

“Overall the general insurance market is well placed to weather the COVID-19 storm, although some sectors like travel and health insurance are particularly exposed to the ongoing disruption. However, consumers remain unconvinced about the industry’s response to the crisis and looking ahead are likely to scrutinise policy terms more closely ...

## Cooking in America: Incl Impact of COVID-19 - US

“Increased time at home has resulted in consumers spending more time in their kitchens cooking and baking. While this is great news for cooking and baking brands, they will be challenged as cooking fatigue sets in and consumers report enjoying the cooking process less. It will be important for brands ...

## Cooking Sauces and Pasta Sauces: Inc Impact of COVID-19 - UK

“The restrictions and lockdowns enacted to combat the spread of COVID-19 in 2020 have provided a boost to cooking and pasta sauces. The category has benefited from the edict to work from home, a reluctance to visit foodservice venues and people tightening their purse strings. The expected shift towards more ...

## Diet for Weight Management - China

“Weight management will evolve to be more than simply improving the looks. It will become a long-term emotive journey for the mainstream healthy-weighted consumers. The majority will be managing their weight as an approach to trigger the feelings of being energetic and happy – an indispensable part of holistic wellbeing ...

## Digital Trends - Q4 - China

“Driven by Mintropolitans, smart speakers have improved penetration throughout the four quarters in 2020. Acoustic experience is to highlight for capturing future growth opportunities. Young people (eg Gen-Zers) are not the panacea. High-end digital devices, such as VR devices, may want to re-examine the targeting and positioning strategies.”

– ...

“The contract catering market has been hit hard by the coronavirus pandemic. The widespread closure of catering sites has inhibited activity and where operation is possible, has entailed extra costs and lower capacity due to social distancing regulations.

## Cooking Oils - China

“The COVID-19 outbreak has raised the demand for cooking oil as part of the shift from dining out to cooking at home, which has accelerated the growth in the retail market of cooking oil. Consumers’ special attention to nutrients and tendency to switch between oil types indicates that brands should ...

## Deodorants: Inc Impact of COVID-19 - UK

“While the category was on a downward trajectory even before the pandemic, lockdowns and social distancing in 2020 saw the decline in value exacerbated. With the UK entering another national lockdown in January 2021, usage will continue to be impacted as people spend more time at home. Despite ongoing price ...

## Digital Advertising: Incl Impact of COVID-19 - Canada

“The COVID-19 pandemic has put significant pressure on businesses and this has resulted in a stricter approach to spending, undoubtedly affecting ad spend. As consumers spend ample time performing online activities that have been replaced by those done in-person, an emphasis on digital advertising is critical for businesses of all ...

## Digital Trends Quarterly: Inc Impact of COVID-19 - UK

“Companies need to take advantage of a time when people are shopping more on their smartphones from home to refine their m-commerce offerings to fit their target markets. Younger mobile natives will respond to features that integrate seamlessly with their everyday social activities, such as convenient checkout options and engaging ...

## Domestic Tourism: Inc Impact of COVID-19 - UK

“Consumers’ desire to be outdoors is at an all-time high as a result of the pandemic. The UK’s countryside has great potential to benefit from this. Nature-based holidays with cultural elements, adventure or wellness have high growth potential.”

## Electric and Hybrid Cars: Inc Impact of COVID-19 - UK

“Demand for new hybrid and electric cars is growing. Although currently a much smaller sector than cars powered by traditional petrol or diesel, sales are outstripping both of these established markets. Based on our forecasts, potentially half of new cars could be hybrid, plug-in hybrid or 100% electrically powered by ...

## European Retail Rankings: Inc Impact of COVID-19 - Europe

“Food retailers head the European retail rankings, as one would expect, with Schwarz at the top, however the ranking does reflect growth in online, with Amazon the only non-food retailer in the top 10. Amazon is likely to overtake Carrefour in 2020 and may even challenge Aldi. But it will ...

## Flavor Lifecycles: Incl Impact of COVID-19 - US

“The flavor lifecycle follows flavors and the paths they take through discovery and sometimes reinvention on the possible route to mainstream adoption and the many stops in between. Changing times mean the lifecycle continually evolves, yet it has been quickly rerouted due to the COVID-19 pandemic and its impact on ...

## Food and Drink Packaging: Inc Impact of COVID-19 - UK

“COVID-19 resulted in plummeting demand for packaging in the foodservice and hospitality sector, but this was partly offset by a shift to in-home consumption and a surge in demand from food and drink into retail.

## Eating Out Review: Inc Impact of COVID-19 - UK

“For years, pubs and coffee shops have been vying with one another in ruling the high street, and with more consumers staying at home since the start of the pandemic, a fundamental human need for community unlocks the opportunity for both to respond and give consumers a sense of belonging ...

## European Retail Briefing: Inc Impact of COVID-19 - Europe

“European supermarkets and discounters stand out in terms of the impact of the COVID-19 pandemic having experienced a strong uptick in demand for food and essentials during 2020. Since the beginning of the outbreak, we have seen all the leading retailers quickly adapting to the new circumstances, with a plethora ...

## Evolving eCommerce: Vitamins, Minerals & Supplements: Incl Impact of COVID-19 - US

“The VMS ecommerce market is benefiting in a number of ways in 2020. The overall VMS market has been on a steady upward trajectory for many years, and consumer reliance on these products to support both physical and mental health makes them even more valuable as the COVID-19 pandemic continues ...

## Food and Drink Nutrition Claims: Incl Impact of COVID-19 - US

“The immune support claim has become of paramount importance to consumers in 2020 due to fears of the virus, and brands, especially beverage brands, are already responding by creating new products featuring vitamins/ingredients including vitamins C and D, and zinc. Consumers want foods and drinks that offer functional benefits ...

## Foodservice in Retail: Incl Impact of COVID-19 - US

“While COVID-19 has forced many retailers to scale back high-contact self-serve prepared food offerings, foodservice will emerge from the pandemic more essential than ever to grocery retailers’ long-term growth prospects but will also face even greater

While the pandemic has shifted demand and disrupted supply chains, the food and drink packaging ...

## Free-from Foods - Ireland

“The free-from category has experienced exceptional growth in recent years and 2020 was no different. More time spent at home coupled with the closure of foodservice and the bulk-buying behaviours witnessed during the beginning of the pandemic all resulted in increased demand for free-from foods.”

– Emma McGeown, Senior ...

## Gaming Trends: 2021: Incl Impact of COVID-19 - US

“The spotlight on gaming has never been brighter and it will continue to shine throughout 2021. While lifestyles have changed due to COVID-19, gamers’ core motivations for playing have remained relatively the same. Most gamers look to video games to unwind and take a break from daily stresses; playing to ...

## Hispanics and Alcoholic Beverages - Spotlight on Beer: Incl Impact of COVID-19 - US

“COVID-19 disrupted Hispanics’ social lives and – with it – many occasions in which Hispanics consume alcoholic beverages. It also affected their finances, leading to a change in spending priorities. Unless strong habits and positive attitudes toward drinking alcohol were in place before the pandemic, Hispanics might be missing triggers ...

## Hotels: Inc Impact of COVID-19 - UK

“When the UK finally emerges from its COVID nightmare there is likely to be a surge of interest in experiences such as luxury hotel weekends away as people celebrate the return of normal life. Special occasion breaks cancelled during the pandemic (milestone birthdays etc) will offer particular opportunities. Over-50s have ...

competition. Now is the time for retailers to explore expanded menus and ways to ...

## Future of Mobility: Incl Impact of COVID-19 - US

“While COVID-19 has negatively affected vehicle sales, including electric, hybrid and autonomous, neither the pandemic nor the recession has halted the future of mobility. Automakers are still continuing down the path of a safer, more sustainable automotive industry. In the coming years, the automotive industry will see the advent of ...

## Health Supplements - China

“Increasing health awareness and the corresponding investment in proactive healthcare will ensure the future growth of the health supplement market, particularly the subsegments trending in the time of COVID-19 (eg probiotics, vitamins). Future opportunities lie in targeting young consumers with interactive marketing education for TCM ingredients, upgrading products using drinking ...

## Home Insurance: Inc Impact of COVID-19 - UK

“The economic impact of COVID-19 will focus minds on value for money, further intensifying price competition in the home insurance market. The industry has struggled to increase penetration for a number of years, especially among the private rental market. To appeal to renters insurance must be reframed to dispel its ...

## Household Packaging and Format Trends: Incl Impact of COVID-19 - US

“Homecare packaging is on the cusp of a renaissance. New materials and designs are driving improved ecommerce through lighter weight and more secure packaging, while simultaneously reducing the category’s environmental impact through reduced carbon footprints and easier recycling.

While consumers have historically paid little mind to homecare packaging, there is ...

## Improving the Home: Incl Impact of COVID-19 - Canada

“As homes are forced to act as a central hub for Canadians during the pandemic, demands placed on them are higher than ever. The additional free time afforded by business closures and cancelled social outings is allowing some Canadians to dust off their to-do lists to tackle home projects. New ...

## IP and Licensed Merchandise - China

“With the continuous improvement of consumers’ personal identity, the concept of IP has become broader and has become an important image element that highlights personal characteristics in the society. Licensed products related to IP have correspondingly ushered in broader market opportunities. Local IP in China is also constantly emerging, which ...

## Later Life Financial Planning: Inc Impact of COVID-19 - UK

“COVID-19 has been a crisis of later life health but has not caused a crisis of later life finances. Consumers’ financial planning for their later years is still focussed on ensuring sufficient income and staying in their home for as long as possible. Long-term care needs, however, remain largely neglected ...

## Luxury Travel: Inc Impact of COVID-19 - UK

“COVID-19 has changed the way travellers define a luxury holiday. Whilst comfort remains a key element, feeling special and making memories have become more essential. Destinations closer to home and villa holidays will continue to be more popular options compared to prior to the pandemic, whilst multi-centre trips hold high ...

## Marketing to Dads: Incl Impact of COVID-19 - Canada

“Marketing to dads can be a challenging task for companies; not only do they need to understand parents, but specifically the men in those family households. That challenge has become more complex in recent years as modern fatherhood has evolved – even in comparison to how today’s dads were raised ...

## Improving the Home: Incl Impact of COVID-19 - US

“The home has always been a special place, but 2020 put that into focus as the pandemic completely altered how consumers use their homes. While the surge in DIY projects is unlikely to continue long term, category players have an opportunity to use the current momentum and the new appreciation ...

## IP和授权产品 - China

“随着消费者个人认同感的不断提高，IP的概念越来越广泛，并已经成为社会中凸显个人特点的重要形象元素。与IP相关的授权产品也相应地迎来了更广阔的市场机遇。中国本土IP也不断涌现，在满足消费者追随本土文化的过程中，也对国内IP的运营提出了更大的挑战。”

– 益振嵘，品类总监

## Leisure Review: Inc Impact of COVID-19 - UK

“2020 has been a very difficult year for the UK leisure market. The uncertain economic climate will continue to pose a threat to discretionary spending once restrictions are lifted following yet another lockdown in early 2021, while fear of catching the virus will continue to feed feelings of discomfort in ...

## Magazines: Inc Impact of COVID-19 - UK

“While some genres have performed well since the outbreak, such as cooking, gardening and news magazines, most titles are simply trying to weather the storm, while developing their digital platforms. There are, though, more indications that multi-magazine subscriptions could be a viable and successful option for the market going forward ...

## Mass Merchandisers: Incl Impact of COVID-19 - US

“Mass merchandisers are one of the few retailers benefiting from the changes caused by the pandemic and recession, similar to the 2008 financial crisis. Consumers who are prioritizing essentials and value – both affordability and convenience – are gravitating to

mass retailers as their primary shopping destination, resulting in positive ...

## Menu Insights - Tea Houses 2H - China

“Pressure to enlarge the consumer base and jack up unit prices continues to mount, while the COVID-19 outbreak halted the dominant out-of-home consumption in the first couple months of 2020. Combined these factors have negatively impacted the tea house business. In order to get ahead in this saturated market, players ...

## Music and other Audio - CDs, streaming, downloads & podcasts: Inc Impact of COVID-19 - UK

“The music industry has fared well through the pandemic. Streaming platforms have seen an increase in users and dedicated playlists have helped steer consumers through new routines by relieving stress and improving concentration, whilst co-ordinated retail campaigns have helped bolster physical format sales. Longer term, new features on streaming platforms ...

## Omnichannel Retailing - China

“Omnichannel retailing enhances Chinese consumers’ shopping journey and experience, allowing them to navigate online and offline platforms to find the latest products and the best deals. Driven by technological and socioeconomic developments, many innovative retail formats with futuristic applications will emerge. However, in the near term, omnichannel retailers should focus ...

## Panificação: Incluindo Impacto da COVID-19 - Brazil

“A categoria de pães e produtos panificados têm sido favorecida durante a pandemia de COVID-19, já que mesmo diante da crise econômica, os consumidores continuaram consumindo produtos panificados. A saudabilidade é a principal tendência que impacta o setor, gerando oportunidades para produtos fortificados, com benefícios adicionados e com redução de ...

## Purchasing Technology Products in Lower Tier Cities - China

## Mission Driven Retail: Incl Impact of COVID-19 - US

“All companies are in business to sell a product or service. The brands that realize their beliefs, values and ethical practices are what will set them apart from competitors will be most successful in earning the hearts of their customers, and that’s what matters most at the end of the ...

## Nuts, Seeds and Trail Mix: Incl Impact of COVID-19 - US

“The pandemic has reinforced consumer interest in health and wellbeing, and driven at-home consumption of nuts, seeds and trail mix. Consumers are seeking comfort, pleasure and satisfaction in healthy snacks, supporting category growth. However, economic uncertainty also reinforces consumer interest in value. This has created challenges for major brands in ...

## Over-50s Guaranteed Acceptance Life Insurance: Inc Impact of COVID-19 - UK

“COVID-19 has ended two years of healthy growth in the over-50s life insurance market; however, the market should recover quickly. A sharp drop-off in new business subsided in the second half of 2020, and Mintel research suggests that the pandemic is motivating people to think more about their life insurance ...

## Pizzas and Pies: Inc Impact of COVID-19 - UK

“More meals and snacks being eaten at home during the COVID-19 pandemic boosted retail sales of both pizza and savoury pastries during 2020. The income squeeze in 2021 and the enduring rise in home working longer term will continue to benefit the category, although consumer interest in healthy eating will ...

## Renewable Energy: Inc Impact of COVID-19 - UK



“Consumers from lower tier cities have high expectation on the enhancement of quality of life brought by technology products, especially smart products. When purchasing technology products, they are more willing to combine offline product trial with recommendation from KOLs (Key Opinion Leaders), so as to have an in-depth understanding of ...

## RTD Alcoholic Beverages: Incl Impact of COVID-19 - US

“RTD alcoholic beverages are a bright spot in the alcohol space, avoiding the flight seen in other alcohol categories and even continuing to recruit new and older users. Seltzers remain the growth driver, getting a further boost from large brands entering the market from both within and outside the alcohol ...

## Shopping in Outlets - China

“Shopping in outlets is a new trend driven by consumption upgrading and increasing demand for domestic shopping. Outlets used to be attractive because of their brands and prices. But now, for outlets, providing consumer-friendly entertainment facilities with comprehensive brand portfolios is key to luring more footfalls, since consumers are beginning ...

## Small Business Overview: Inc Impact of COVID-19 - UK

“Small businesses are active in virtually every sector of the UK economy and so some have been strongly impacted by COVID-19. However, the evidence is that during the first wave they performed better than the UK average, but equally they are expected to suffer to a greater extent in the ...

## Soap, Bath and Shower Products - China

“Hand sanitizer has emerged as a winning category after COVID-19 due to growing demand for personal hygiene, while the bath and shower product market grew relatively slower. Consumers have upgraded their demand from functional-driven to skinare and emotional benefits, driving product innovation and premiumisation.”

– Vicky Zhou, Research Analyst

“The renewables sector has proved generally resilient, despite the impact of COVID-19 on new build activity in 2020. Industry players continue to show robust commitments to invest in renewables as costs decline and on the back of some positive policy announcements. As such, the UK government has recently committed to ...

## Sauces, Seasonings and Spreads - China

“Sauces, seasonings, and spreads is expected to enjoy a steady growth after COVID-19 due to growing frequency of in-home cooking. Retail value sales are expected to grow in all segments, with more concentrated market share to leading players. Consumers’ changing dining habits and growing healthy consciousness is driving the channel ...

## Shopping Malls - China

“E-commerce poses the biggest threat to shopping malls and the outbreak of COVID-19 has exacerbated the situation since consumers now worry about infection. Fortunately, consumers’ shopping mall visits seem to have returned to normal after the home quarantine period. But consumers’ requests have become more demanding. The role of shopping ...

## Small Domestic Appliances: Inc Impact of COVID-19 - UK

“The small domestic appliances market remained resilient in the face of COVID-19 uncertainty in the past year. Although the rate slowed slightly, spending grew again, aided by the market’s pre-existing maturity online and immediate opportunities amid extended periods inside, the uptake of new pastimes and a new focus on diet ...

## Social Lives of Singles: Incl Impact of COVID-19 - US

“The COVID-19 pandemic has limited singles’ ability to meet potential partners in person, and lasting cultural shifts toward more time spent working, shopping and exercising at home will continue to prevent unmarried adults from making romantic connections in the future. Dating apps have quickly evolved to incorporate video dating and ...

## Sports among the Youth - China

“While sports consumption was negatively affected by COVID-19 in the short term, we’re seeing recovery of the sports industry as social distancing rules relax. Holiday sports such as skiing/snowboarding and surfing, as the trendiest sports in young consumers’ eyes, are expected to boom after the pandemic is over as ...

## Sugars and Alternative Sweeteners: Incl Impact of COVID-19 - US

“Like many food and drink categories, after years of weakening sales, the sugars and alternative sweeteners category was the recipient of a significant tailwind from COVID-19 as a result of the dramatic increase in at-home consumption occasions. Consumers are turning to a diverse array of sweeteners, especially those with a ...

## Super Protein: Incl Impact of COVID-19 - US

“Despite the buzziness of plant-based proteins, consumers are still widely engaged with animal-based proteins. While the majority of consumers have made no changes to their protein consumption patterns, for those that have implemented active change, more consumers are increasing rather than reducing. Health, perhaps ironically, is the catalyst for both ...

## The Future of eCommerce: Emerging Technologies: Incl Impact of COVID-19 - US

“In light of COVID-19, tech adoption accelerated nearly five years, meaning consumers and brands are more actively using available technologies and will continue to do so moving forward. Once nice-to-have tech options such as AR, digital showrooms and virtual consultations are now becoming must-haves for consumers across generations. Emerging tech ...

## The Modern Workplace: Incl Impact of COVID-19 - US

“COVID-19 has significantly changed what the modern workplace looks like for Americans, including where and

## Sports Fashion: Inc Impact of COVID-19 - UK

“In the immediate aftermath of the COVID-19 outbreak in the UK, many big-name brands reported large declines in sales as stores globally were forced to close and people curbed their spending due to financial uncertainty. However, with demand for comfortable athleisure items growing and more people buying clothing suitable for ...

## Suncare: Inc Impact of COVID-19 - UK

“COVID-19 proved to be particularly challenging for suncare, with usage occasions severely impacted. Although demand is expected to resume in the longer term as consumers get back to normality, the pandemic has highlighted the category’s reliance on factors that brands cannot control for repeat purchase. Blurring the line between suncare ...

## Technology Influencers - China

“Within the technology industry, technology KOLs have a debatable influence in terms of driving technology purchases, but are unavoidable to enhance brand marketing. They are more influential with younger consumers specifically by focusing on value-for-money technology products and to help make technology based information more entertaining. KOLs resonate best with ...

## The Future of Foodservice: 2021: Incl Impact of COVID-19 - US

“The US foodservice industry saw unprecedented challenges in 2020 due to the pandemic and recession. These challenges will continue to plague restaurants in 2021, especially full-service ones, delaying a full sales recovery until 2023. To survive the ongoing crisis, restaurants must become off-premise business experts, engaging consumers in new and ...

## Travel Influencers - China

“Consumers want to hear directly from travel brands rather than secondary sources. Moral values influence how consumers choose inspiration sources and will have an impact on purchasing decisions. Consumers also

how they effectively work. The modern workplace was already in flux prior to the pandemic, but COVID-19 has accelerated several workplace trends, including the ubiquity of remote work, the reliance on technology to support a ...

## UK Retail Briefing: Inc Impact of COVID-19 - UK

There is only one place to start in reviewing 2020 and that is of course the global pandemic which has shifted so much of consumer behaviour. A hopefully once in a generation event, COVID-19 has served to not only overnight change behaviour, but most notably accelerate the shifts in the ...

## Western Spirits - China

“Chinese consumers’ interest in Western spirits is increasing driven by fast developing economic status and aspirations for a trendy lifestyle. This brings opportunities for companies and brands to encourage consumption by making Western spirits less mysterious and more easily approachable, especially among the younger generation who are curious and ready ...

## Young Beauty Consumers - China

“Beauty has transformed beyond its functional nature to become a stronger form of self-expression. Beauty brands have a fast-diminishing moral authority to dictate beauty trends and expect young consumers to follow. Instead, they now need to support young consumers in finding their own beauty and expressing themselves. In the meantime ...

## 低线城市：科技产品购买行为 - China

“低线城市消费者对于科技产品，尤其是智能产品，所能带来的生活品质提升非常期待。他们在选购科技产品时，更希望结合博主的推荐，去线下实际体验，从而加深对科技新概念的理解，并理性平衡对于不同价位产品的期待值。基于对同一品牌高低配产品差异颇大的认识，低线城市消费者更愿意优先考虑配置。在科技产品同质化严重的现状下，通过O2O新型体验店的形式提高到店消费转化率，或通过提升‘社会价值’来增加品牌辨识度，将成为品牌实现差异化的有效方法。”

demand brands to be transparent in communications. Establishing a specialisation in delivering inspirational marketing contents from a cultural perspective can ...

## Vision Health: Incl Impact of COVID-19 - US

“The vision health market has strong reach, with 81% of adults using corrective eyewear and sales estimated at more than \$30 billion in 2020. Market sales have waned as Americans avoid visits to nonessential healthcare facilities due to COVID-19. Beyond the pandemic, adults will revert back to routine vision health ...

## White Spirits: Incl Impact of COVID-19 - US

“Spirit brands are reeling from the loss of on-premise sales, and consumers facing economic hardships prioritize known, familiar brands over experimentation. Opportunities within the market exist despite these challenges. Tequila and gin continue to thrive due to the popularity of premium varieties, and tequila and gin brands are embracing innovation ...

## 低线城市美妆消费者 - China

“低线城市的消费者虽然广泛使用线上信息渠道，但是更信赖“素人”。她们虽然活跃地使用网购渠道，但是广泛存在对货品真假的不信任。虽然大部分已经在水、乳、霜之外使用精华，但是追求的功效仍有相当的升级空间。虽然听说过敏感肌，但是相关认知却仍然模糊.....这是正在追赶一线城市消费者脚步的，“转型期”中的低线城市女性消费者现状。为了瞄准她们所能释放的巨大市场潜力，品牌需要明确这些观念、认知、习惯与一线城市的差异，更恰当地调整策略，以期进一步争夺下沉市场。”

— 尹昱力，研究分析师

## 体重管理的饮食习惯 - China

“体重管理将不断演进，不再简单关于于外形的改善。对体重健康的主流消费者而言，体重管理将成为一场与情绪关联紧密的长途之旅。大多数消费者会利用体重管理来保持精力充沛和心情愉悦——这在整体健康中不可或缺。消费者会依赖于科学又容易上手的健身和营养方案，以不断优化体重管理进程。这意味着体重管理食品和饮料凭借在产品配方和消费场合（如时间与地点）上的创新可涉足的

— 邵愉茜，研究分析师

## 保健品 - China

“健康意识的不断增长以及对医疗保健的积极投入将确保保健品市场的未来增长，尤其是那些在新冠疫情期间受到欢迎的子品类（如益生菌、维生素）。未来增长机遇在于通过互动营销来吸引年轻消费者使用中药药材，使用饮料剂型提升产品功效和口感，以及推出外敷和口服相结合的美容养颜保健品。”

— 刘文诗，研究分析师

## 啤酒 - China

“新冠疫情蔓延，居家饮酒习惯应运而生，啤酒零售量小幅上升。不过，市场长期增长要靠高端化推动。好消息是消费者愿意为采用优质麦芽和酒花酿造的啤酒支付更高价格。除了产品升级，硬苏打水全新推出，亦会吸引年轻用户并且聚拢注重健康的消费群体。另外，消费者饮酒解压属于首要目的，品牌必须精准施策，调整营销重点、凸显陪伴理念。”

— 俞文，研究分析师

## 奶酪 - China

“奶酪市场尽管基数较小，但将继续其增长轨迹，成为增长最快的乳制品品类。品牌可扩展奶酪的产品形式，将其置于更广的零食品类竞争之中，更加瞄准成人消费者，而不是仅仅注重其营养价值。与餐饮渠道的餐厅合作可以向非奶酪消费者推广新的食用方式，培养更强的烹饪和烘焙习惯。”

— 蒋安妮，研究分析师，食品与饮料

## 年轻一代美容消费者 - China

“美妆已经超越了功能性的范畴，成为一种较为强烈的自我表达形式。过去，美妆品牌主导着美容潮流，并期望年轻消费者亦步亦趋，而如今，品牌的这种意见领袖地位正迅速弱化。取而代之的是，它们需要帮助年轻消费者发现和表达自身独特的美。”

范围颇广。”

— 顾菁，品类总监，2020年12月4日

## 全渠道零售 - China

“全渠道零售逐渐提升中国消费者的购物旅途与体验，消费者能通过这种方式在网上与线下平台中发掘最新产品与最佳优惠。受益于科技与社会经济的发展，市场上将涌现许多方式前卫的创新零售形式。然而，全渠道零售商近期内应着重发展以消费者为核心的购物体验。鉴于全渠道零售利用诸多触点收集数据，零售商从而能更好地为其顾客服务，在多渠道间打造连贯一致的顾客体验将会是一项持续存在的挑战。科技将得以适当应用，来提升消费者的购物体验，而不是边缘化那些不太玩得转科技的顾客。全渠道零售未来将蓬勃发展，因此商家必须确保其服务对于每个人都便于使用、直观且具有包容性。”

— 颜慧诗，研究分析师

## 奥特莱斯店购物 - China

“奥特莱斯购物是消费升级和国内购物需求增加而带动的新趋势。奥特莱斯之前因其品牌和价格而具有吸引力。但现在，对于奥特莱斯而言，提供适合消费者的娱乐设施和齐全的入驻品牌是吸引客流量的关键，因为消费者开始将光顾奥特莱斯视为家庭旅行或休闲活动。同时，加快数字化让消费者有更多的机会光顾奥特莱斯，以及在疫情爆发期间和疫情之后吸引和留住高端购物者，做到这几点在长期内会实现收入最大化。”

— 董文慧，研究分析师

## 婴幼儿营养 - China

“虽然出生率持续下滑，但婴幼儿营养市场整体保持稳定增长，这主要得益于配方奶的高端化趋势以及婴幼儿辅食和营养补充剂渗透率不断提高。市场机遇在于针对前沿的配方奶成分进行互动型市场教育，推出多种类型的功能型辅食产品（如将新配方和感官刺激相结合），以及搭乘零食趋势推进营养补充剂的创新。”

## 年轻人的运动 - China

“虽然运动消费短期内因新冠疫情受到负面影响，保持社交距离措施放宽后，体育产业开始出现复苏。滑雪和冲浪等度假运动是年轻消费者眼中最时髦的运动，预计疫情结束后，将随着运动主题旅游继续盛行而蓬勃发展。同时，较年轻一代逐渐接受用抖音等新媒体观看体育赛事以及获取信息，说明运动产业玩家有望利用这类新兴平台吸

与此同时，品牌需要对年轻消费者的消费能力建立符合实际的认知，因为这制约着这些消费者的产品使用和品牌选择。高性价比依然重要，品牌在定价方面可以更加透明，以赢得年轻消费者的信任。”

— 李玉梅，高级研究分析师

## 数码趋势——四季度更新 - China

“2020年4个季度中，智能音箱的渗透率保持增势，这得益于英敏特城市精英人群对该品类的接受度提升。听觉体验是品牌把握未来增长机遇的关键。年轻消费者（如Z世代）并非带动市场增长的灵丹妙药。VR设备等高端数码设备或许要重新审视目标人群和定位策略。”

— 赵凌波，高级研究分析师

## 汽车售后市场 - China

“汽车售后市场维持稳健增势，2020年注册登记的乘用车数量预计将逾2.2亿辆。消费者定期保养的意识和对汽车改装的兴趣提高，这也为售后市场创造了潜在商机。4S店在专项修理方面保持强势，却在快速修理方面日渐丧失优势。质量有保证和努力帮助车主了解更多关于售后服务的信息会对赢得售后市场的消费者起到重要作用，也有益于品牌声誉。此外，新能源汽车的售后市场高度活跃，充满了各类挑战与机遇。如何将用车信息融入售后市场的服务或将在近期为该市场带来颠覆性变化。”

— 周同，高级研究分析师

## 汽车购买过程 - China

“未超出最初预算购车的车主仅占不到40%，大多数车主在购车时会为更高的配置或更高级的车型超预算。即使在新冠疫情影响下，这样的升级意愿依旧强烈，仍有逾70%的被访车主表示换购新车的档次必须比现在的车更高。”

同时，随着车型和选择不断多元化，消费者发现更难分辨其中差异，甚至对汽车设计产生审美疲劳。因此，购车过程中的首要考虑因素是车型和能源类型，而非品牌偏好，高端价格区间的车也不例外。如何打造令人难忘的品牌形象仍是关键问题之一。品牌一直在探索新的途径，包括在视频平台上传递信息，以赶上消费者不断变化的习惯和兴趣。”

## 消费意愿——四季度更新 - China

“中国政府采取的一系列经济刺激政策有效地促进了重要经济指标的回升。消费者依旧将存钱作为头等大事，保持谨慎乐观的态度仍是当下的重要主题。然而大家对经济发展的信心明显增强。很多人愿意追求自我享受型的消费，

引年轻消费者。”

— 陈杨之，高级研究分析师

## 旅游意见领袖 - China

“消费者希望直接聆听旅游品牌的声音，而非二手消息。道德价值观影响消费者选择“种草”渠道以及购买决策。消费者也希望品牌能够在沟通中保持透明。从文化角度切入，提供旅游“种草”内容，有利于品牌脱颖而出。因为该领域将驱动未来旅行体验，特别是瞄准Z世代人群，但目前尚未着力开发。”

## 汽车市场动态——四季度更新 - China

“2020年第四季度整体销量同比2019年第四季度呈现出超8%的增长，年末销量翘尾效应明显。2020年乘用车销量较2019年跌幅减小，疫情后的用车刚需和消费者信心的恢复成主要因素，预计2021年同比增长率转正。营销方面，汽车品牌在年轻化战略，提升社文化品牌体验以及电商领域合作的道路上进行了多元化的尝试和探索。如何更好地理解消费者需求，将品牌文化理念和性能等优势传递给消费者，成为所有汽车品牌需要着力思考的问题。”

— 袁淼，研究分析师

## 洗手洗浴用品 - China

“新冠疫情爆发后，消费者的个人清洁需求猛增，洗手液成为一大赢家品类，而泡澡和沐浴产品市场增长相对较慢。消费者对产品的需求升级——从追求实际功效到对护肤和情感功效的追求，这一趋势也驱动着产品创新和消费升级。”

— 周文棋，研究分析师

## 科技意见领袖 - China

“在科技行业内，科技KOL在拉动科技产品购买方面的影响力颇具争议，但该群体也不可避免地加强了品牌营销。该群体对较年轻的消费者更具影响力，具体来说是通过关注性价比高的产品以及让科技类信息更具娱乐性这两个途

得到高品质的生活方式，获得舒适的消费体验。新冠疫情爆发后，日益兴起的国内免税店和线上渠道为奢侈品品牌创造了新的营销对策。在线医疗和在线学习等行业预计在2021年将实现飞速发展。”

— 张鹏俊，研究分析师

## 美妆意见领袖 - China

“随着中国消费者的购买流程愈发复杂，美妆意见领袖的影响力也愈发分散。传统的意见领袖营销对提升品牌知名度和销售仍十分重要，但围绕真实性和多元化的问题或预示着未来挑战。要想消除疑虑，美妆广告可以启用更多真实消费者，利用口碑效应和熟人营销的影响力；美妆品牌也可以打造自己的意见领袖，代表品牌个性。”

— 李玉梅，高级研究分析师

## 西方烈酒 - China

“中国消费者经济状况的快速提升及其对时尚生活方式的追求，促使其对西方烈酒产生日益浓厚的兴趣。因此，企业和品牌有机会增进人们对西方烈酒的了解，拉近与消费者之间的距离，尤其是喜欢猎奇、乐于尝鲜的年轻一代，从而鼓励消费。此外，迎合消费者就餐习惯，为其带来放松和享受等额外乐趣，也是赢得消费者青睐的两个关键点。”

— 靳尧婷，研究分析师

## 酱料、调味料和涂抹酱 - China

“得益于居家烹饪频率的提高，酱料、调味料和涂抹酱市场预计在新冠疫情后将保持稳定增长。各细分的零售额都将增长，领先品牌将占领更多市场份额，市场集中度更高。消费者的用餐习惯不断改变，而且健康意识不断提高，将促进渠道多样性和产品形态创新。”

— 徐如一，北亚区报告总监

## 食用油 - China

径实现。KOL在提供可靠专业的信息上与消费者产生的共鸣最强，而非‘个性’方面。”

— 许昕远，研究分析师

## 菜单洞察——茶饮店（下半年）- 中国 - China

“扩大消费群体和提高单杯茶饮价格的压力与日俱增，同时新冠疫情导致2020年的前两个月，占主导地位的外出消费中断。种种因素对茶饮店市场造成了负面影响。为了在这块饱和市场取得领先，玩家不妨在低线市场捕捉机遇，这些市场的竞争不那么激烈，而需求同样强劲。此外，消费者不吝支出，对于想借助产品升级实现高端化的品牌而言也是一大利好。在这块拥挤的市场，消费者的品牌忠诚度较低，因此玩家将营销重点放在提高现有茶饮用户的粘性和购买频率上。”

— 俞文，研究分析师

## 购物中心 - China

“电商是购物中心最大的威胁，而且新冠疫情爆发之后，因为消费者担心感染新冠病毒，使得电商的威胁更甚。幸运的是，居家管控期结束之后，消费者前往购物中心的情况似乎已回归常态。但是，消费者要求越来越高。购物中心的作用是成为一个以社区为导向的场所，具有多功能的设施和服务，能够满足未来的社交和家庭需求。需求端消费力提升、生活方式升级，以及供应端的新零售形式和科技，将有助于达成以上目标。”

— 彭袁君，研究分析师

## 酸奶 - China

“今年酸奶市场的增速有所放缓，但2021年很可能再度回升并迎来高个位数增长。新冠疫情促进了消费者对酸奶的需求，因为他们寻求更好的免疫力。常温酸奶的增速仍然跑赢冷藏酸奶，因为常温酸奶更容易买到，并且在低线城市和农村地区的渗透率更高。冷藏酸奶很可能会经历小幅增长。在市场方面，冻干技术和渠道协同将带来新机遇。同时，新颖的口味和质地以及具备特定具体功能的酸奶也在刺激该品类的消费者需求。”

— 彭袁君，研究分析师



“受新冠疫情影响，消费者对食用油的需求不断提升。消费者的用餐习惯从外出就餐变为在家烹饪，这一趋势显著加速了食用油零售市场的增长。在选购食用油时，消费者特别关注营养，并且会经常更换不同种类的食用油。因此，品牌应优化自己的产品组合，通过提供更健康的油种，和改良的传统油种产品，满足消费者的消费升级需求。随着健康饮食越来越受重视，消费者在食用油的消费上将会持更为谨慎的态度。因此，品牌有必要迎合消费者烹饪习惯的变化，与健康饮食建立联系，倡导更健康的消费方式。”

— 鲁睿勋，研究分析师