

## September 2020

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

“The pandemic has brought people closer to their personal spaces and consumers are now reassessing the value they provide. Air care products are an effective way for consumers to feel more comfortable at home, while mood-enhancing scents have proven attractive to consumers during stressful times. The home has also taken ...

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

“COVID-19 has had differing effects on the UK economy, but it has hit the service sector hardest. Customer-facing services in sectors such as retail, hospitality and leisure have been most impacted both because of Government restrictions and continued consumer wariness. The pandemic has also affected the market for commercial office ...

### Bodycare - China

“Unlike other BPC categories where visuals are more important, bodycare relies strongly on personal usage feelings, which is why launching products that reassure consumers of a good skin feel is essential. Facing fierce competition from shower products that can deliver similar skin benefits of moisturising, the bodycare category needs to ...

### Breakfast Foods - China

“During the outbreak, more consumers have taken breakfast at home, which provides good opportunities for retail products. By leveraging digitalization, players are endeavouring to meet the breakfast needs of every consumer by building up convenient breakfast service facilities. Despite being touted as the most important meal during one’s day, breakfast ...

### Car Usage Habits: Incl Impact of COVID-19 - China

### Automotive Innovation: Incl Impact of COVID-19 - Canada

“There has been a burst in automotive innovations hitting the market in the past several years, straddling areas such as safety, convenience, performance and connectivity in addition to autonomous and electric advancements. Consumer interest is strong for auto technologies that revolve around autonomous safety and many are willing to pay ...

### Beauty Online: Inc Impact of COVID-19 - UK

“Although growth in the online beauty market was strong prior to the COVID-19 outbreak, it was slowing as retailers were struggling to increase engagement with the channel. However, 2020 marked a turning point as online demand surged amidst disruption. Whilst a reluctance to visit physical stores and an eroded in-store ...

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

“COVID-19 has provided a boost to the bread category. With the nationwide lockdown, bread volume sales, which have been on a downward trajectory for several years, rose, thanks to out-of-home breakfasts and lunches shifting to the home overnight.

### Bridging Loans: Inc Impact of COVID-19 - UK

“Bridging lenders must ensure that the risk appetite of the loans they underwrite is such that they can maintain a viable business and adapt to changing economic drivers without carrying a high default rate in the currently challenging lending market.”

– Lewis Cone, Senior B2B Analyst, 22nd September 2020

### Ceramic Tiles: Inc Impact of COVID-19 - UK

“The rise of individual car use after COVID-19 is prominent for both essential trips and leisure travel, since only 12% of surveyed car owners reply their car use hasn’t increases for any of the listed occasions. With more time spent in cars, in-car health and safety has become a top-of-mind ...

## Changing Retail Landscape: Incl Impact of COVID-19 - US

“COVID-19 is wreaking havoc on the retail industry and economy at large and will continue to force permanent change. Retailers will approach change in phases, remaining nimble enough to accommodate a constantly fluid environment while COVID-19 persists, while at the same time looking ahead to strategically plan for and invest ...

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

“COVID-19 has provided the coffee market with a temporary boost, as the nationwide lockdown brought out-of-home coffee to the home overnight. As the lockdown continues to be eased, however, more coffee occasions are expected to shift back out of home, albeit to a lesser extent than previously. Whilst coffee in ...

## Consumers and Retail Banking: Inc Impact of COVID-19 - UK

“COVID-19 presents an enormous challenge to retail banks in terms of profitability, but it has also been an opportunity for providers to refresh their image and demonstrate their support for consumers. Mintel’s research shows there is a clear opportunity for banks to forge a positive lasting impression on younger generations ...

## Credit Cards: Inc Impact of COVID-19 - US

“Spending behaviors are changing both due to the COVID-19 pandemic as well as the current US recession. Savings have increased during the pandemic, but issuers will want to be cautious. As COVID-19 stimulus money runs out and bill deferments end, issuers should be more cautious about who they target to ...

“The ceramic tile sector has been strongly impacted by COVID-19, with demand expected to fall by almost 24% in 2020, before returning to 2019 levels in two years’ time. Thereafter, demand changes are inevitable in what was a mature market. While commercial demand for offices and the retail sector are ...

## Chilled vs. Frozen Foods - Ireland

“During the COVID-19 pandemic grocery retailing soared as consumers shifted away from foodservice and had more time for at-home cooking – benefiting chilled foods significantly, for example meat/poultry. The lower price point of frozen foods coupled with its longer shelf life saw demand for frozen food rise significantly as ...

## Compras Online x Offline: Incluindo Impacto da COVID-19 - Brazil

“Com a exceção de lojas e comércios essenciais, como mercados e farmácias, o impacto da COVID-19 nos comércio online e offline foram praticamente opostos. Enquanto o comércio offline foi severamente impactado, obrigando muitos comerciantes a fechar suas portas definitivamente, o comércio online cresceu e se expandiu como nunca no país ...

## Credit Cards: Inc Impact of COVID-19 - UK

“COVID-19 has shaken the credit card sector as new lending collapsed and air miles lost their appeal as overseas travel was cut off. As the economy tentatively reopens, nervousness about borrowing means lending is recovering more slowly than spending. As young people turn their backs on credit cards in an ...

## Credit Cards: Incl Impact of COVID-19 - Canada

“Credit card spending is down due to the pandemic. Rewards are great tools to spur incremental spend but consumers are rethinking which rewards matter to them. Innovative rewards are in and cashback remains king, but travel rewards are less relevant now.”

– Sanjay Sharma, Senior Financial Services Analyst

## Dark Spirits and Liqueurs: Inc Impact of COVID-19 - UK

“Despite being a major threat to the market, the re-energised focus of health since COVID-19 also presents opportunities. Being almost non-existent in this category, the rapidly growing low-/no-alcohol space is ripe for development in dark spirits, as is NPD in lower sugar/calorie liqueur drinks. The rise in at-home ...

## Digital Advertising: Inc Impact of COVID-19 - UK

“As a result of the COVID-19 outbreak people are spending more time online and making more purchases online, which increases opportunities for digital advertising, particularly direct response adverts. Major social networks have introduced more direct response and shoppable adverts since the start of the pandemic. One of the long-term results ...

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

“There is an industry adage that says, “In good times you want to advertise, in bad times you must advertise.” Following the downturn in economic activity due to COVID-19, an effective digital advertising presence will be necessary for businesses both big and small to drive awareness and growth moving ...

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

“Despite supply chain issues, the leading brands have continued to release annual upgrades across technology segments. Foldable and dual-screen offerings are bringing innovation to smartphones, laptops and tablets, although take-up remains low. The economic uncertainty surrounding COVID-19 will see consumers even more focused on price and reliability when it comes ...

## Emerging Flavours and Ingredients: Incl Impact of COVID-19 - Canada

“Canadians’ demands of flavours and ingredients are complex. While many show a clear openness to trying new options, there’s also a strong pull to familiarity that can also bring comfort. There is an opportunity for companies to expose Canadians to flavours and ingredients less commonly considered to offer variety, but ...

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

“The ongoing COVID-19 pandemic continues to affect consumer behaviour in different ways across Europe. The importance of wearing a mask or face covering when outside the home appears to vary depending on each government’s rules, while other trends such as the shift to online shopping remain strong everywhere. The feeling ...

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

“In 2019, retail sales increased for the vast majority of European countries, and the combined value of retail sales for the 36 major economies covered in Mintel’s European Retail Handbook reached €3.5 trillion. Germany has the largest retail market but France appears second, followed by Russia and placing ...

## Facial Cleansing and Makeup Removal Products - China

“COVID-19 has had a temporary impact on the growth of the facial cleaning and makeup removal markets in China in 2020. However, looking forward, the trends of natural, safe, and caring cleansers and removers will sustain, encouraging brands to enhance their formulation and communication to better suit consumers’ shifting and ...

## **Fashion & Sustainability: Inc Impact of COVID-19 - UK**

“The media and high-profile events have helped to raise awareness regarding the need to make more considered fashion purchases. This has been even more prominent during COVID-19, with many headlines covering how retailers have treated staff during the pandemic. However, with so much confusion regarding what makes a fashion retailer ...

## **Grocery Retailing: Incl Impact of COVID-19 - Canada**

“It is so cliché to use the word unprecedented in 2020, but this truly is an unprecedented time for the grocery sector right now as significant changes are seen in consumer approach to grocery shopping. Before the pandemic, grocery shopping was all about routines and habits, with behaviours practically entrenched ...

## **Hot and Cold Cereal: Incl Impact of COVID-19 - US**

“With wellbeing, value and convenience top-of-mind, cereal brands have more than one path to staying relevant with shoppers. After years of declines and stagnation, the cereal category returned to sales growth in 2020 due to COVID-19. Sudden and enduring shifts in daily, especially morning, routines impacted the cereal category, with ...

## **Kitchens and Kitchen Furniture: Inc Impact of COVID-19 - UK**

“COVID-19 will see kitchen furniture sales fall sharply amid a reduced appetite for big-ticket purchases in 2020, store closures, a reluctance to allow tradespeople into the home and a slowdown in the housing market. However, extended periods inside will see an unprecedented rise in kitchen usage across the UK, refocusing ...

## **Leisure Centres and Swimming Pools: Inc Impact of COVID-19 - UK**

“Public leisure centres and swimming pools have been badly hit by the COVID-19 crisis and face a long road to

## **Feminine Hygiene and Sanitary Protection Products: Incl Impact of COVID-19 - US**

“The feminine hygiene and sanitary protection category is in a moment of growth and evolution. Consumer expectations are extending beyond functional needs, challenging key players to offer eco-friendly packaging, natural/organic materials and ingredient transparency at affordable price points. At the same time, brands have opportunity to grow user knowledge ...

## **Health and Fitness Clubs: Inc Impact of COVID-19 - UK**

“While some Brits are still nervous about visiting or returning to a gym, people are prioritising both their physical and mental health more than ever. Operators will need to develop more holistic services that enable consumers to incorporate activity from outside the gym, and harness new technologies for progress tracking ...

## **Impacting eCommerce: Shipping & Delivery: Incl Impact of COVID-19 - US**

“Consumers have had to accept delays in shipments due to COVID-19, as retailers both focused on fulfilling orders of essential items, as well as struggled to keep up with the influx in demand. However, consumers will expect delivery services to resume to pre-pandemic timing as the country further moves into ...

## **Large Home Appliances - China**

“Brands and retailers should stay positive about COVID-19’s effect on overall industry sales. Consumers’ increased willingness to upgrade their home appliances is expediting the industry’s development towards building more holistic smart home ecosystems. There is potential for lower tier markets with the growing demand for product upgrades with more functions ...

## **Loyalty Programs: Incl Impact of COVID-19 - US**

“Whether consumers support a brand and whether a brand can withstand unforeseen circumstances like the COVID-19 pandemic boils down to how much loyalty the

recovery. The pace at which they move along it will be determined by the government's appetite for state support and the ability of operators and local authorities to move beyond ...

## Luxury Accessories - China

"Luxury accessories are increasingly more accepted by consumers and gradually becoming a form of daily wear. The domestic market has become a more important market for luxury brands and Chinese consumers' high acceptance of e-commerce means luxury brands need to re-think their strategy in China. Increasing awareness of aesthetics and ...

## Marketing para Pais: Incluindo Impacto da COVID-19 - Brazil

"Os pais com filhos de até 18 anos estão bastante sobrecarregados no momento. Além de todas as preocupações comuns trazidas pela COVID-19, eles ainda enfrentam a dificuldade de administrar a rotina familiar com as escolas fechadas. O acúmulo de funções pode trazer consequências para a saúde mental desse grupo. Produtos ...

## Marketing to Hispanic Moms: Incl Impact of COVID-19 - US

"COVID-19 has disrupted Hispanic moms' lives, bringing uncertainty for the future. In response, Hispanic moms are taking control of what they can to protect their families. Beyond COVID-19, Hispanic moms have high expectations about their children's future. They see education as a priority and want to walk side by side ...

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

"On the whole, Millennials are unified in their less positive outlook on life and their more fluid notion of adulthood. While the pandemic has added mental and emotional weight for all segments, Millennials entered into the pandemic already 'low' – feeling less stable and content as they're less established, yet ...

## Men's & Women's Clothing: Incl Impact of COVID-19 - US

brand propagates. While loyalty is generated by much more than a loyalty program, getting the components of the loyalty program right can pay dividends relative to ...

## Managing Emotional Wellbeing - China

"The majority of Chinese believe that their emotional health is not in good form, driven by high incidence of stress and fatigue, as well as growing financial pressures and increasing workload. Despite this pessimism, proactive self-evaluation drives up better self-management. Opportunities lie in providing more detailed solutions rather than a ...

## Marketing to Black Moms: Incl Impact of COVID-19 - US

"Black moms are aware of the unique parenting challenges they face this year amid COVID-19 and an intensified focus on social justice. However, they want to avoid making their kids fearful of the world, and instead give them confidence to overcome any challenge they face. Their primary focus is their ...

## Marketing to Men - China

"Men show high willingness to spend more on self-improvement in appearance and fitness, as well as taking more responsibility in family purchases. Being long exposed with diversified information from social media to ecommerce platforms, men have become more capable of applying technology to make life convenient and comfortable, and more ...

## Marketing to Parents: Incl Impact of COVID-19 - Brazil

"Parents with children under 18 are heavily burdened at the moment. In addition to all common concerns created by COVID-19, they still face the challenges of managing the family routine with schools closed. Stacking of tasks can have consequences for this group's mental health. Products and services that can make ...

## Men's Facial Skincare - China

“Clothing, a nonessential category, continues to be impacted by the combined pandemic and recession. Out-of-work, worried consumers are quick to scale back spending on new clothes and also have less of a need for new clothes, with limited events and occasions to shop for. When they do shop, value will ...

## Menu Insights - Brunch and Afternoon Tea - China

“Western-style brunch and afternoon tea have started becoming viral in China as each meal occasion has garnered an incidence of around 70%. However, the high penetration rate doesn't translate into a mature market given that both meal occasions are loosely defined. In order to stand out in the fierce market ...

## Mobile Phones and Network Providers - China

“China is likely to lead the 5G revenue uplift. Consumer upgrade intentions are strong, focusing on key features such as smoother operating experiences, 5G enablement, and higher quality. As for data plan upgrades, operators will focus more on expanding the 5G use scene for consumers with more data plans and ...

## Perceptions of Beauty across Generations: Incl Impact of COVID-19 - US

“The once singular approach to beauty marketing and product development is no longer cutting it for consumers. While preferences and engagement varies by generation, nearly all consumer groups have mixed emotions when it comes to beauty. Consumers recognize that beauty products can provide a self-esteem boost but also feel that ...

## Pet Foods - China

“Pet owners are becoming knowledgeable and sophisticated in selecting pet food, as they will proactively seek information before making purchase decisions. Their concern around food safety and attention to nutrition suggest brands should not only fortify nutrition but also provide transparent

“The men's facial skincare market has embarked on a journey of growth transformation, with male consumers polarising. Some men have started to expand their routines with a wider range of facial skincare products, from facial masks to sun care products. Meanwhile, a growing proportion of men are still struggling to understand ...

## Mobile Gaming: Incl Impact of COVID-19 - US

“Mobile gaming is a great entry point for brands looking to reach the gaming community. The mobile gaming world brings in all types of players, from the casual tourists to highly invested, dedicated players. The audience for mobile gaming will continue to grow as COVID-19 accelerates gaming's adoption into mainstream ...

## Online vs Offline Shopping: Incl Impact of COVID-19 - Brazil

“Except for essential stores, such as supermarkets and pharmacies, the impact of COVID-19 on online and offline shopping was almost opposite. While offline shopping has been severely impacted, forcing many businesses to close their doors permanently, online sales have grown like never before in the country. To sustain this surge ...

## Pet Food: Inc Impact of COVID-19 - UK

“The recession triggered by COVID-19 is prompting consumers to scrutinise their spending. The extensive private label presence on the one hand and the myriad of small specialist brands on the other leave mainstream brands faced with a formidable task to prove their value. Health is as much of a focus ...

## Pizza Restaurants: Incl Impact of COVID-19 - US

“Pizza restaurants are an indisputable bright spot amid a struggling restaurant industry as a result of the COVID-19 crisis. Many leading pizza chains have managed to grow sales into the double-digits in 2020 due to their continued investments in takeout and



information. With the evolving attitudes of treating pets as ...

## **Plumbing: Inc Impact of COVID-19 - UK**

“Plumbing products are generally a mature market, though growth has been achieved in recent years from major fashion trends, such as en-suite bathrooms and open plan living. COVID-19 has hit the markets hard in 2020, with construction related products typically exaggerating GDP changes, but opportunities in new housing are now ...

## **Restaurant Breakfast and Brunch Trends: Incl Impact of COVID-19 - US**

“The ease and affordability of making breakfast at home paired with the increase in remote working means the recovery of foodservice breakfast sales will lag behind the foodservice industry as a whole. LSRs facing fierce competition will launch aggressive promotions in a race to the bottom on price in order ...

## **Sparkling Drinks - China**

“Sparkling beverages have proven their popularity through the surge in sales of sparkling water, and their wide range of application will allow extension into other drinks categories. The shrinking population of key younger consumers and enduring concerns around sugar pose challenges for CSDs going forward. With low/no/reduced (L ...

## **Sports and Energy Drinks - China**

“The rate of value growth slowed for both sports and energy drinks in 2019, with COVID-19’s impact then resulting in sales declines. The market will recover slowly but brands need to provide more value added when faced with increasing pressure from adjacent categories. Brands can increase market education to tie ...

## **Televisions: Inc Impact of COVID-19 - UK**

delivery and prioritization of value. Pizza restaurants are positioned ...

## **Price Comparison Sites in Financial Services: Inc Impact of COVID-19 - UK**

“Price comparison sites have taken a hit from the impact of COVID-19 on consumers’ demand for travel-related financial services products and credit, and the restrictions placed on car sales and home moving by lockdown. However, aggregators will be relied upon by increasingly price-conscious consumers to help them navigate the economic ...

## **Social Media Usage in Lower Tier Cities - China**

“Lower tier city consumers rely on online channels for every step when shopping, from learning what is on-trend to keeping in touch with brands, from selecting and purchasing products to sharing their shopping experience. For brands seeking to penetrate the lower tier market, it is important to build multi-functional platforms ...

## **Sponsorships and Sports Marketing: Incl Impact of COVID-19 - US**

“Sports are a powerful unifying force, bringing together people from all across the country to feel part of the same community with a common goal. While COVID-19 may have abruptly paused sports across the country, sports have resumed with full enthusiasm from both fans and brands alike, bringing along with ...

## **Technology Habits of Generation Z: Inc Impact of COVID-19 - UK**

“Video calling has been a key tool for Generation Z as the COVID-19 lockdown stopped them from in-person social interaction, and many in the age group say they are likely to continue to use it in the future as a result of the pandemic. Video calling platforms must grasp the ...

## **Televisions: Incl Impact of COVID-19 - US**

“Despite a spike in sales of televisions in the initial stages of the pandemic, as consumers bought new sets for the household in lieu of socialising, profit warnings from manufacturers as well as supply chain issues, mean the picture is not all rosy. Heavy discounting of recent models and competition ...

### **Term Assurance: Inc Impact of COVID-19 - UK**

“Term assurance sales will decline in 2020 following the hit taken to business in Q2 as lockdown measures brought the housing market to a standstill. However, there are reasons to be optimistic. Sales are expected to bounce back in the second half of the year as the mortgage market rebounds ...

### **The Future of Quick Service Restaurants: Inc Impact of COVID-19 - UK**

“As most QSR operators are forced to streamline their business in response to COVID-19, menu innovation needs to focus on healthful choices as well as broadening consumers’ at-home experiences. These include diet-specific meals as well as meal kits featuring fast food recipes.”

### **The Working Life - Ireland**

“COVID-19 has seen half of Irish workers note disruption to their work-life balance, as more are forced to work at home – however overall Irish consumers report being happy with their work-life balance, while reports indicate general satisfaction with remote working, pointing to this being a more regular fixture in ...

### **Vehicle Recovery: Inc Impact of COVID-19 - UK**

“The market for vehicle recovery is expected to suffer relatively minimal disruption from the COVID-19 pandemic. Assisted by the annual payment for most policies the sector is forecast to see recovery from 2021 helped by moves from many players in this market to move away from price competition and add ...

“The strong bond Americans have to television has strengthened the TV market despite the pandemic and should support it even through the recession. TV brands should be taking steps to ensure their products reflect consumer attitudes that the television set isn’t just an electronic device or piece of furniture, but ...

### **The Fitness Consumer - China**

“The outbreak of COVID-19 has brought more opportunities to the fitness industry in China than challenges. Wellbeing, experience and technology will be the key consumer trend drivers. Consumers will look for fitness solutions in everything they do. Meanwhile the purpose of doing fitness activities is not just for physical wellbeing ...

### **The New Activist: Incl Impact of COVID-19 - US**

“Throughout 2020, America has seen a surge in social awareness and consumer activism. The COVID-19 pandemic, the social inequities it’s underscored, and a series of racially fueled conflicts and killings have led to a social and racial justice awakening across the country. While the New Activist consumer segment only includes ...

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

“Christmas 2020 will be a festive season like no other. The COVID-19 pandemic will shift traditional shopping habits, strain will be placed on logistic networks and for many retailers it will be a make or break period. Despite consumer willingness to enjoy Christmas following the events of 2020 the economic ...

### **Vitamins and Supplements: Inc Impact of COVID-19 - UK**

“The pandemic will drive demand for vitamins and supplements as health and wellness become bigger consumer priorities. Immune health in particular is in the spotlight, and brands can look to offering more holistic solutions, considering the links between stress, sleep, nutrition and diet on immunity. The category is expected to ...

## Vitamins, Minerals and Supplements Trends: Incl Impact of COVID-19 - US

“The vitamins, minerals and supplements market will continue to grow despite the economic downturn, due to strong associations in supporting specific areas of wellness, particularly ones trending in the time of COVID-19. While multivitamins continue to show highest usage, consumer demand for more targeted benefits beyond overall wellness continues to ...

## 低线城市：社交媒体使用习惯 - China

“低线城市消费者通过社交媒体来实现从了解消费趋势到深度接触品牌，从选购产品到分享消费经验的全过程。对于想要打入下沉市场的品牌来说，打造将资讯、娱乐、社交和购买融为一体平台和内容尤为重要。就平台而言，实现场景化、呈现高密度信息的社交电商平台和提供多样化的本地服务的品牌购物社群是品牌提升销量转化的重要战场。在内容和形式上，贴近消费者生活并提供过程体验的视频会能他们带来更多临场感和代入感，而有拼劲的博主会增加带货的感染力和说服力。品牌可以着眼于帮助消费者实现他们的‘网红梦’，提供更精准、更人性化的推荐，从而建立起品牌与用户之间的双赢关系。”

— 邵愉茜，初级研究分析师

## 大家电 - China

“面对新冠疫情对整个行业的冲击，品牌和零售商应保持乐观。消费者升级现有家电的意愿更强烈，加速了行业向整体智能家居生态系统发展的步伐。在较低线城市，消费者追求更多功能和更优设计，对产品升级的需求与日俱增，折射出较低线城市的巨大市场潜力。中国大家电市场竞争激烈，智能家居和多功能性正在驱动市场的高端化进程。”

— 施洋，研究分析师

## 宠物食品 - China

“宠物主人在选择宠物食品方面变得更为成熟且更有经验，因为他们在做出购买决定前会主动搜寻信息。他们对食品安全的担忧和对营养的关注表明，品牌不仅应强化营养，还应提供透明的产品信息。随着人们对待宠物的态度不断转变，将其视为家人和朋友，对功能的关注将有助于提升宠物的全方位健康。此外，人们对人宠关系的重视也表明，提升食用体验是宠物食品值得关注的创新途径。”

— 鲁睿勋，研究分析师

## Yogurt and Yogurt Drinks: Incl Impact of COVID-19 - US

“Stay-at-home orders mandated by the pandemic have accelerated yogurt’s return to relevance, as consumers cling to familiar, affordable, health-focused options to meet snack cravings for themselves and their families. The yogurt drinks segment will require some more finessing to find footing, given its strong draw for portability, but has an ...

## 健身人士 - China

“对中国健身行业来说，新冠疫情带来的机遇大于挑战。身心健康、体验和科技将会是关键消费者驱动力。消费者会从自己日常所做的每件事中寻求健身方案。同时，健身的目的不仅是增强体质，还有情绪管理（如远离压力）。此外，消费者会进一步依赖科技更好地了解自己，并更高效地达成健身效果。品牌可把握住这些领域的机遇，从而在未来市场中蓬勃发展。”

— 顾菁，品类总监

## 奢华配饰 - China

“奢侈品配饰越来越多地为消费者所接受，逐渐成为日常穿搭的一种形式。对奢侈品牌而言，国内市场已成为相当重要的市场，中国消费者对电商的接受度高，意味着奢侈品牌需重新思考在中国市场的战略。人们对于审美和可持续发展愈发强烈的认知，带来了更多对于产品创新和营销组合的关注。消费者希望物品的吸引力和价值更持久，因此，新冠疫情之后，他们对高级珠宝手表的兴趣有所攀升。”

## 情绪健康管理 - China

“多数中国消费者认为自己有情绪健康问题。压力和疲倦是提及率高的情绪问题，经济压力和工作量大也是提及率高的情绪问题来源。虽然消费者情绪健康情况不乐观，但是，积极的自我情绪评估意味着情绪问题将得到更积极的管理。品牌的发展机遇在于提供更具体的解决方案，而不是笼统宣称能提升心情。具体而言，品牌可应对短期的压力和睡眠问题，或者长远来看，将情绪问题和具体人群的健康问题联系在一起。品牌也可提供有意义的理由来鼓励消费者参与人际沟通，而非简单地说服消费者走出舒适圈。同时，品牌也可使用更温情的营销沟通手段，如营造一种享用产品的仪式感。”

## 手机和网络运营商 - China

“中国有可能引领5G收入增长。消费者升级意愿强烈，主要集中在诸如手机运行更流畅、可使用5G和质量更好等关键特征方面。就数据流量升级而言，运营商更注重为消费者拓展5G应用场景，提供更多数据流量和额外的通话时间。”

— 许昕远，初级研究分析师

## 气泡饮料 - China

“气泡水销售额激增，说明气泡饮料颇有人气。其应用广泛，也必将延伸至其他饮料品类。碳酸饮料进一步发展面临的挑战包括关键年轻消费者人口数萎缩以及对糖分的持续关注。低/无/减糖和卡路里成为新的标准。鉴于此，整个行业都在努力进行产品创新，为市场带来‘有益健康’的产品才能维持市场增长。”

— 徐文馨，高级分析师

## 男士营销 - China

“男性愿意花更多的钱在外表和健身方面进行自我提升，也愿意在家庭采购上承担更多的责任。长期以来，从社交媒体到电商平台，男性接触到的各种信息更加多元，他们更有能力运用科技让生活变得方便舒适，也更有信心在自己、家人和朋友购买时制定自己的标准。”

男性是简单的生物，而女性是复杂的，这种观点长久以来一直存在，但已不再是正确。除了沉着稳重的、有阳刚男人味典型的男性形象外，他们也越来越意识到还应具有善解人意、潮流时尚、精致等其他有吸引力的特质。在向男性营销时，充分挖掘男性对健康、运动和科技的实际兴趣，同时了解他们对“男人的浪漫”的追求，将有助于品牌有效地触及目标男性消费者。”

— 甘倩，研究分析师，2020年9月30日

## 菜单洞察——早午餐和下午茶 - China

— 刘文诗，研究分析师

## 早餐 - China

“疫情期间，更多消费者在家吃早餐，这给零售产品带来契机。各商家正搭乘数字化趋势，构建便利的早餐服务设施，以努力满足每位消费者的早餐需求。尽管早餐被誉为一天中重要的一餐，但由于消费者早上时间紧张和胃口不佳，早餐经常会被省略。谷物食品方便准备，除此之外，谷物食品品牌还可以添加“更多有益成分”，以加强该品类的健康形象。”

— 吴珍妮，研究分析师

## 汽车使用习惯 - China

“新冠疫情后，个人汽车使用在基本出行和休闲旅行方面都有显著增长，仅12%的被访车主表示他们的汽车使用频率在所调研的任何场景中都没有增加。随着车主将更多时间花在汽车上，车内健康和安全感也成为了他们最关心的方面，因为他们可以从中获得安全感和被保护感。因此，刹车辅助和360度全景影像等主动安全功能，以及健康材料和车内空气净化器等与健康相关的汽车设备越来越受到关注。汽车已不仅仅只是一种交通工具，而日益成为了即使在停泊不动时也可以用来放松，可以用来做个性化布置的像家一般的空间。通过了解消费者对于汽车使用态度的转变，品牌可以更多致力于多功能汽车的设计创新，并抓住信息、休闲和零售服务等生活领域存在的商机。”

— 王慧蓉，研究总监

## 男士面部护肤品 - China

“男士面部护肤品市场已踏上增长转型之路，男性消费者呈现两极化趋势。部分男性已开始拓展护肤流程，使用从面膜到面部防晒等种类更丰富的面部护肤品。同时，越来越多的男性仍然难以理解面部护肤的必要性，并在过去几年退出了该品类。”

— 李玉梅，高级研究分析师

## 身体护理用品 - China

“早午餐和下午茶已开始在中国走红，分别皆有70%左右的渗透率。然而，高渗透率并不意味着这是一个成熟的市场，因为这两种餐饮场合的定义都比较宽泛。为了在未来激烈竞争中突围，商家需对菜谱进行大胆创新，例如添加植物基原材料，并且为消费者提供潮流而摩登的用餐体验。虽然新冠疫情削弱了消费者的消费信心，但这并不表明餐饮商家需舍弃高端路线。相反，商家需考虑的核心问题之一正是面向不同消费者时如何找到高端和实惠之间的平衡点。”

— 俞文，研究分析师

## 运动和能量饮料 - China

“2019年运动饮料和能量饮料市场的销售额增速均有所放缓，随后疫情影响导致销售业绩下滑。该市场将会缓慢恢复，但面对相邻品类的步步紧逼，运动和能量饮料品牌需提供更多附加价值。品牌可以加大市场教育力度，将习惯性饮用与实现健身目标联系起来。在产品开发方面，品牌不妨考虑提供额外的功能，并围绕口味、质地和形态开展创新。”

— 蒋安妮，研究分析师，食品和饮料

“其他美容与个人护理品类的产品视觉效果更重要。而身体护理产品与此不同，非常依赖个人使用感受。因此，推出让消费者有良好皮肤感受的产品至关重要。沐浴产品与身体护理产品有相似的润肤功效，两者竞争激烈。身体护理产品品类需注重创新，提供沐浴产品品类很难达到的额外功效，如美白和抗衰老，并且借用面部护肤潮流中的明星成分和概念，满足消费者的精细需求。”

— 靳尧婷，研究分析师

## 面部清洁和卸妆产品 - China

“2020年，新冠疫情对中国洁面和卸妆产品市场造成了短期冲击。但放眼未来，随着消费者更加了解自己的皮肤状况，他们会一如既往地追求天然、安全和呵护型洁面和卸妆产品，这将促使品牌改进配方、调整沟通策略，以更好地迎合消费者不断变化的护肤需求。”

— 尹昱力，研究分析师