

January 2019

### Air Care - US

"Air care experiences high penetration, resulting in nearly flat market sales over the last five years. While 31% of consumers report using air care products more often as opposed to less often in the past year, long-established formats saw a decline in usage amid ingredient concerns and cross-category competition. In ...

### Attitudes towards Corporate Social Responsibility - China

"Chinese consumers have high CSR awareness. They increasingly seek companies that are socially responsible and show interest in a wider range of responsible areas. Companies today have to grow beyond setting up charitable funds or separate projects. It is time to integrate CSR into corporate culture and set quantifiable goals ...

### Auto Service, Maintenance and Repair - US

"The automotive service and repair landscape is extremely competitive and fragmented. There are a variety of firms including quick lube chains, full-service dealership centers, local independent repair garages, and others competing over consumer spending. In order to be successful in the auto service and repair market, firms need to identify ...

### Back to School Shopping - US

"The BTS (back-to-school) shopping season is the second largest retail sales period of the year behind the winter holidays, representing a key time for retailers to engage with both parents and kids and also to build relationships and loyalty that may be leveraged at other shopping moments. Loyalty often begins ...

### Beauty and Personal Care Retailing - France

"In a low growth market, the French specialist beauty sector remains relatively stable, with several well-performing retailers, notably Sephora, creating a

### Amazon: A Shopper's Perspective - UK

"Amazon is the arch disruptor in a period of evolution for UK retail. The size of the business and its relentless focus on customer-facing innovation has meant it has invested in and led on many trends that have come to define 21st century retail. However, at present, it is not ...

### Attitudes Towards Financial Advice - Canada

"In times of market turbulence, client communication becomes even more important for financial advisors as jittery clients seek reassurance and advice."

### B2B Insurance - UK

"The insurance supply landscape has started to change, with insurers needing to operate in a way that serves both their distributors and reinsurers and capital providers. Larger insurance groups need to be proactive in tackling rising costs and continue to innovate to create new platforms and products that meet demand ...

### Beauty and Personal Care Retailing - Europe

"Beauty and personal care products (BPC) retailing is more varied around Europe than almost any other sector. From drugstores in Germany to supermarkets in other countries, the market is largely in the hands of non-specialists. But there is a fightback being staged by the specialists – Douglas has embarked on ...

### Beauty and Personal Care Retailing - Germany

"It would be wrong to suggest that the beauty and personal care retailers have had it easy in recent years, though the failure of Schleckler did give them breathing

dynamic environment. Elements of spending are well suited to shopping online, and most retailers now sell this way, with varying degrees of digital integration. Amazon poses an ongoing threat ...

## Beauty and Personal Care Retailing - Italy

"Italy's BPC market is going through a period of change. The independents and regional chains are losing market share, whilst the leading specialists are capturing more spending as they continue to expand their geographical coverage. However, price competition is intense and the country's economic recovery has once again slowed, meaning ...

## Beauty and Personal Care Retailing - UK

"The UK beauty and personal care market continues to be characterised by the polarised performance of the two core categories. Consumers continue to cut back on personal care, but are willing to spend on beauty. Health and beauty specialists have benefited from this trend, with robust demand for beauty fuelling ...

## Beverage Blurring - Brazil

"In order to enhance the positive perception of the category and boost consumption frequency, brands need to invest in healthy alternatives, offering nutritional and functional benefits to consumers, as well as innovative flavors and textures that arouse their curiosity. In addition, non-alcoholic blurred beverages need to be clear in their ...

## Black Consumers' Diet and Wellness - US

"Black adults believe that a healthy diet and exercise leads to overall wellness, but their knowledge of what constitutes a healthy lifestyle and their everyday habits are sometimes in conflict with one other. Most Black adults are concerned that their efforts to maintain or improve their health status do not ...

## Cider - UK

space. We think they have used it well, strengthening their chains and regaining for the sector all the market share that ...

## Beauty and Personal Care Retailing - Spain

"Beauty and personal care specialists will have to offer a more compelling in-store and online experience in the next few years if they are to fend off the competitive challenge from non-specialist retailers. At the same time, they are going to have to adjust their business models to take into ...

## Bebidas Não-Alcoólicas: Interação entre as Categorias - Brazil

"Para ampliar sua percepção positiva e frequência de consumo junto ao consumidor brasileiro, além de investir em alternativas saudáveis, adição de benefícios nutricionais e funcionais e sabores e texturas que despertem a curiosidade, as marcas de bebidas misturadas não alcoólicas precisam ser claras em sua comunicação e educar os consumidores ...

## Beverage Blurring - US

"Category-defying hybrid drinks have been at the heart of much growth and innovation in the non-alcoholic beverage market. While just 13% of US adults overall report drinking hybrid beverages, the most engaged consumers – iGens, Millennials, parents, and Hispanics – are often young and influential. Further, these key consumer groups ...

## Brand Overview: BPC - UK

"The changing nature of wellbeing presents opportunities. While previously consumer focus may have been mainly about the impact of products on the body, we are already starting to see the mind take equal precedence. The inclusion of probiotics, adaptogens and aromatherapy claims to keep the whole body in balance could ...

## Civil Engineering - UK

"Barrel-aged ciders appeal particularly to over-55s, making these variants a promising means for companies to maintain engagement among older consumers. As well as tapping into quality associations around longer ageing, these products would also offer a less sweet flavour profile, which is likely to be particularly welcome to older people ...

## Computer Security - UK

"The UK computer security market is now valued at more than £5 billion. As more and more businesses, public services and consumers are becoming dependent on their technology platforms, digital activity is growing exponentially, which, in turn, is attractive to miscreants. This ranges from issues of national security to personal ...

## Consumer Snacking Trends - China

"As consumers today are concerned more on the freshness of snacks, 'short-shelf-life' snacks have entered the spotlight. Consumers who opt for this attribute are actually seeking 'all natural' products, as freshness usually means 'no preservatives'. Innovation in 'short-shelf-life' snacks now is concentrated on bakery products, but as consumers' pursuits for ...

## Consumers and the Economic Outlook Q1: Defining Financial Success - US

"The US economy continues its slow upward trajectory, even as discussion of tariffs and trade discussions cause the stock market to fluctuate a great deal. US unemployment – already at extremely low levels – decreased further in October of 2018, while labor force participation remained steady. Despite a slight dip ...

## Convenience Stores - Canada

"Convenience stores are a fixture in the Canadian retail market. With easily accessible locations and long business hours, they offer consumers a shopping option that is quick and easy. As retail has evolved in recent years – including grocery stores, big box stores and e-commerce – it is worthwhile to ...

"The major projects set to drive output over the next five years include HS2, Hinkley Point C, Thames Tideway Tunnel, major road schemes, Network Rail's modernisation programme and projects associated with the decarbonisation of the energy system. However, shortages in skilled labour and construction materials capacity will pose challenges to ...

## Consumer Attitudes towards Housing Needs - China

"With government introduced guidelines to control housing speculation and develop the rental market, in 2018, a small amount of pent up rigid demand for housing has been released into house purchasing market, but there was no rise in renting. The main reason for this is that tenants have diverse and ...

## Consumer Trends, Attitudes and Spending Habits for the Home - UK

"Despite the backdrop of uncertainty, wages are actually rising faster than inflation. There is strong evidence that people plan to keep on spending on their homes in 2019, reflecting their goal to make the home a more enjoyable place to live. Their desire to make the place feel like their ...

## Consumers, Saving and Investing - UK

"Savers who set savings goals are much more likely to remain engaged and also to build savings and investments of significant value. Open Banking platforms and app-based savings providers offer a new approach to saving, with a variety of savings tools which hold strong appeal for Millennials. Incumbent providers looking ...

## Crisps, Savoury Snacks and Nuts - UK

"Snacks are one area where health priorities take more of a backseat for consumers. In light of the government expectations of calorie reductions, this poses a notable challenge to the category. Brands looking to explore a better-for-you positioning in line with government goals need to ensure products deliver on taste ...

## Digital Engagement Platforms: PC, Mobile and Voice - UK

“The trend towards smartphone-first consumers is continuing. More people than ever say the smartphone is the most important device to them, but despite this there are many who stick to computers to manage money and shop online. Meanwhile, voice control has emerged as an exciting new platform for digital engagement ...

## Feminine Hygiene and Sanitary Protection Products - UK

“The UK’s ageing population has helped to create a fast-growing incontinence products market. That rosy picture doesn’t extend to the sanitary protection and feminine hygiene categories, however. The former is contending with a long-term fall in sales, while the latter is struggling to really convince consumers as to what benefits ...

## Hábitos de Consumo de Snacks - Brazil

“Equilibrar a redução dos níveis de sal e açúcar dos snacks (demanda do governo e também da população) sem acarretar em perdas de sabor para os consumidores será um dos principais desafios para a indústria de snacks nos próximos anos. Acordos assinados pela indústria com o governo para a redução ...

## Health Management Trends - US

“The health and wellness market has grown from an industry to a culture, expanding the definition of what it means to be healthy in more holistic terms. All adults report doing something for the benefit of their health and wellbeing so brands have an opportunity to connect with consumers to ...

## Hispanics' Diet and Wellness - US

“How Hispanics approach their overall wellbeing depends on how concerned they are about their physical and emotional wellbeing as well as how they eat. How they react to these concerns shows that the Hispanic market is far from being homogeneous, and each of the different segments offers unique characteristics for ...

## European Retail Briefing - Europe

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

### Fleet Services - UK

“The fleet services market maintained growth in 2018 as it again overcame Brexit headwinds and wider turmoil in the automotive industry. However, uncertainty continues to suppress potential fleet demand given the drop in business confidence and the subsequent delay on investments.

Fleet providers remain dynamic in the face of this ...

### Handbags - UK

“Handbags are expected to have performed well in 2018, mainly due to its success within the luxury market. However, things are expected to slow post-Brexit. While younger women continue to be the main handbag buyers, brands and retailers should be thinking of new ways to attract a different consumer as ...

### Health Tech - China

“Chronic disease is a key focus in the health tech market. Consumers’ strong desire for disease prevention has stimulated interest in health data and indicators of diseases and changed the ways they manage health conditions. Consumers are also expecting more advanced functions like data analysis, notification and diagnosis.”

– ...

### Holiday Review - UK

“Holidaying remains a clear priority for Brits. However, Mintel expects growth in 2019 to be slow due to economic uncertainties. Domestic holidays, all-inclusive holidays, lower-cost destinations and budget accommodation options are more likely to be considered

in 2019. There is huge potential though to tempt travellers to take a cruise ...

## Home Hair Color - US

"The home hair color market continues to struggle. Preferences for natural looks, concerns about damage, and complicated hair color trends—which are typically left to professionals—have placed downward pressure on the market. However, interest among both young and Black consumers is still strong, making them key markets for home hair color ...

## Lifestyles of Young Families - US

"Fewer Americans are having children and there are now fewer families with kids under age 12 in the US compared to previous decades. One of the top challenges parents continue to face is the high cost of childcare, leading some families to rely heavily on family support to bridge gaps ...

## Lotteries - UK

"By positioning digital platforms as an easier way for players to purchase tickets and a way to ensure they never miss their chance of taking part, operators can increase not only the number of those playing, but the frequency with which they do so."

## Marketing to Women - UK

"Younger women are demanding more social responsibility from companies. Campaigns that aim to affect societal change rather than just promoting a new product or service are likely to become an expectation for this cohort. However, in trying to create a more inclusive, diverse image, some advertising campaigns have missed the ...

## Milk and Dairy Alternatives - Ireland

"Provenance remains an important factor when buying milk. Irish consumers are also willing to spend 20p/20c extra for 2 litres of milk to ensure that farmers are paid a fair price. Highlighting links to local suppliers and how much of the purchase price of milk goes directly to dairy ...

## International Food Trends - US

"International food adoption is a fairly slow process in the US, which prizes traditional Mexican, Italian, and Chinese fare above all else. However, factors are positioning international fare for continued future growth, including an increasingly diverse population that favors such cuisines; the need for restaurants and products to differentiate and ...

## Loans and Credit - Ireland

"While both Irish economies have returned to growth following the severe downturn of a decade ago, consumers have not developed anything like the same appetite for borrowing that characterised the last economic boom. Albeit with some exceptions, the attitude towards borrowing is broadly responsible and measured."

## Marketing to Men - UK

"Men's mental health has become an increasing concern in recent years. While there is often particular emphasis placed on the high number of male suicides, the problem is much broader than this, and many men suffer in silence. For businesses there are undoubtedly reputational benefits to be had for those ...

## Menu Trends - UK

"It is clear that people are paying attention to their health when eating out-of-home. But the conversation about healthy eating is ever-changing, especially when people's knowledge on how they should eat right is continually being undermined by the latest fad diets or lifestyle choices. Promisingly, current diners have shown ...

## Private Label Food and Drink Trends - US

"After years of steady growth, sales of private label food and drinks may have reached their peak. Economic indicators suggest consumers are poised to increase their food/drink budgets, which will offer a challenge for value-oriented store brands. A strength for private label is fresh products – like meats, poultry ...

## Retirement Planning - UK

“The considerable increase in pension ownership as a result of auto-enrolment has played a key role in boosting engagement in retirement planning. Nevertheless, there remains a dire need to further raise not only the overall level of engagement but also the quality of it. Few non-retired adults do much about ...

## Senior Lifestyles - Canada

"Knowing that seniors are the fastest growing segment of the population makes them intuitively an increasingly important segment for marketers to pay attention to. Seniors are bucking stereotypical images and increasingly showing an interest in following their passions and dropping the sentiment that they are too old to keep-up-to date ...

## Snacking Consumption Habits - Brazil

“One of the main challenges for the snacks market in the coming years is reducing salt and sugar content from products (due to legal requirements and consumer demand) while keeping an attractive taste. Agreements signed by the industry with the government for the reduction of substances such as salt and ...

## Snacking Motivations and Attitudes - US

"95% of US adults snack daily, and 70% do so 2+ times per day, making snacking a huge opportunity for connecting with consumers. The percentage of “super snackers” (those who snack 4+ times per day) is increasing, and the fact that busy lifestyles result in the skipping of meals (or ...

## Sport and the Media - UK

“Currently pay-TV providers have a fairly strong hold on UK sports broadcasting, making it difficult for new entrants into the market, such as Eleven Sports. However, as Amazon further pushes into the live sports arena and more sports introduce their own subscription streaming services the dominance of Sky and BT ...

## Sabonetes e Produtos para o Banho - Brazil

“A categoria de sabonetes e produtos para o banho tem alguns desafios no Brasil. A indústria precisa estar atenta aos riscos que certos materiais causam ao meio ambiente e aos seres humanos, como as microesferas de plásticos presentes em esfoliantes, por exemplo. Além disso, é necessário que sabonetes e produtos ...

## Smoking Cessation and E-cigarettes - UK

“The smoking cessation category is expected to decline in value in 2018 following a period of no breakthrough innovation as well as reduced recorded advertising spend since 2015. E-cigarettes, on the other hand, are predicted to have enjoyed strong value growth as smokers continue to use these as a smoking ...

## Snacking in Foodservice - US

"Americans love to snack, with increased usage being driven consumers' busy schedules, interest in health, and eating on-the-go. This represents a robust opportunity for operators to cater to this eating occasion by offering craveable, affordable, and portable options. LSR (limited-service restaurant) operators are in an excellent position to capitalize on ...

## Soap, Bath and Shower Products - Brazil

"The soap, bath and shower products market has some challenges in Brazil. The industry needs to be aware of the risks certain materials can cause to the environment and to people, such as microplastics in scrubs, for example. In addition, it's important that soap, bath, and shower products use ...

## Sugar and Gum Confectionery - UK

“The price-sensitivity of the sugar confectionery market and the powerful influence of price promotions present a real challenge to mainstream players. This puts the onus on operators to create even more compelling – and importantly unique – reasons to buy products. Positively, there are a number of largely untapped opportunities in ...

## Televisions - Canada

"Most consumers have one-to-two televisions, with Samsung being the most commonly found brand of TV in Canadian households. The majority of consumers use a high definition TV, most often, in their homes, while a significantly smaller share utilizes an Ultra HD 4K TV. Opportunity exists for brands to expand sales ...

## The State of the eCommerce Industry - US

"The eCommerce industry is reaching a pivotal point heading into 2019. Online sales are growing faster than overall retail sales as online shopping becomes more routine. Given the level of interest in online shopping as well as the competition for shoppers' attention and walletshare, online retailers must be agile when ...

## Unsecured Loans - UK

"Broader market forces are impacting the credit sector amid growing uncertainty, which is likely to result in important changes in the availability of and preference for different types of credit. A shift towards structured and affordable borrowing is expected, but if personal loans are to benefit providers must get better ...

## 对企业社会责任的态度 - China

"中国消费者普遍具有企业社会责任意识。他们越来越看重具有社会责任感的企业，对企业社会责任的更多领域感兴趣。企业承担社会责任的做法已不再仅仅限于成立慈善基金或发起独立项目。当今企业要将社会责任融入企业文化之中，制定可量化的目标并努力践行；此外，企业社会责任也可成为企业与消费者沟通的渠道，为产品和公司提供故事素材。"

- 赵鑫宇，初级研究分析师

## 零食消费趋势 - China

"由于现在的消费者更关心零食新鲜度，'短保'零食已进入公众视野。由于新鲜度通常表示'不含防腐剂'，选择这一特质的消费者其实是追求'纯天然'产品。'短保'零食的创新如今集中在烘焙产品上，但由于消费者对新鲜度的追求不断提升，'短保'可能成为其他主要品类的新常态，因而对生产商创新能力提出了更高要求。"

- 阿芳，研究分析师，食品和饮料

## The Arts and Crafts Consumer - US

"Participation in crafts has declined slightly among the adult population, while there was a small uptick among kids and teens from the last year. As of now, crafting is being bolstered by adults of the iGeneration (aged 18-24) and most of all Millennials (aged 25-42). In order to stay relevant ...

## UK Retail Briefing - UK

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

## 健康科技 - China

"慢性疾病是健康科技市场的一大关注焦点。消费者对疾病预防有强烈渴望，这刺激了他们对健康数据和疾病指征的兴趣，也改变了其管理健康状况的方式。消费者也期待健康科技具备更多先进的功能，如数据分析、通知和诊断等功能。"

- 黄开意，研究分析师

## 对住房需求的态度 - China

"随着政府发布针对投机买房及发展租屋市场的指导原则，一小部分受压抑的刚性住房需求在2018年被释出至买房市场，而租房比例却未上扬。主要原因是租客的多样化且特定的居住需求尚未被满足。总的来看，消费者投资买房的意向仍然很高，而且对于在非居住地的中国其他城市及海外城市的投资意愿开放。这意味着信任的建立变得前所未有的重要。"

- 尹昱力，助理研究分析师