

January 2020

Air Care - Canada

"Consumer demand for healthier, more natural products is expected to play an important role in shaping the future of the air care industry. Brands will need to adapt and showcase their safety, minimal environmental impact and health benefits in order to fully realize their potential. The importance of creating an ...

Aircare - US

"Aircare had another year of growth as consumers turn to aircare for reasons beyond functional odor control, presenting new growth and engagement opportunities for brands and retailers to boost the sluggish aircare market. Optimal growth will hinge on brands addressing ingredient concerns, which are in part contributing to shrinking inventories ...

Atitudes e Hábitos dos Donos de Pets - Brazil

"Com 69% de pessoas declarando ser donos de pets, existe uma grande oportunidade para a expansão de produtos e serviços para estes consumidores. Mais da metade deles se considera mais como pai do que como dono, mostrando a importância das empresas desenvolverem soluções que se assemelhem às que vemos para ...

B2B Insurance - UK

"The profit margins of UK B2B insurers remain under pressure due to intense competition and unfavourable claims trends. The rate increases achieved in some lines of business have been offset by higher claims and the IPT remaining at its current, relatively high rate. Furthermore, investments continue to provide only marginal ...

Beauty and Personal Care Retailing - Europe

"Growth in the beauty and personal care industry is expected to continue unabated in 2020, in part boosted by technological advancements supporting tailored products and experiences. We anticipate that the most successful retailers will be those that ensure they stay in

Air Care - China

"There has been a shift in consumer demand for air care products, from being functional for eliminating odours, to focus on personal wellbeing by improving indoor air quality, enhancing home ambience and mood, which will be a key growth driver in the future. New product development and marketing in air ...

Amazon: Creating an Ecosystem - UK

"Amazon is the largest non-food retailer in the UK, but in truth it is far more than a retailer; it is also a leading video and streaming provider, a significant consumer electronics producer and much more. The unprecedented success of this not even 30 year old business has come from ...

Attitudes Toward Brand Ethics - US

"About two thirds of adults say they want the brands they support to be ethical. What exactly that means is murky, but most consumers believe that brands have an obligation to not jeopardize their customers' health or safety. About half of all consumers think companies have a responsibility to "do ...

Back to School Shopping - US

"Consumers spend more than \$80 billion getting themselves and their children ready to go back to school. They're mission oriented and bargain hungry and favor retailers who can help them accomplish their goals of saving time and/or money. While BTS (back to school) is a busy time, most shoppers ...

Beauty and Personal Care Retailing - France

"French beauty and personal care specialists are operating in a tough environment – demand is weak and competition is growing from online. Retailers are investing in in-store tech and innovations that blend with the digital world, increasing their omnichannel

tune with what consumers want, especially when it comes ...

Beauty and Personal Care Retailing - Italy

“Consumer spending on beauty and personal care in Italy has been rising for the past six years but has seen a slowdown in the past two years, with retail sales stagnating in 2018. Nevertheless, the leading specialists have continued to outperform the market, and although Italians appear to remain sensitive ...

Beauty and Personal Care Retailing - UK

“As the value of the beauty and personal care sector has fallen into decline, with even beauty seeing negative growth in 2019, retailers need to ensure that they focus on the growth opportunities presented by two key demographics – Gen Z and older women aged 55+. Teens are increasingly being ...

Brand Overview: BPC - UK

“Contemporary consumers are sensitive to the idea of glamour, exclusivity and indulgence, suggesting that BPC products that balance functionality with intangible perceptions of luxury have the potential to resonate widely among consumers. However, ethics have also come into play, and consumers are putting the BPC industry under scrutiny. Increasingly, consumers ...

Civil Engineering - UK

“Ahead of the 2019 general election, the Conservative party pledged to spend £100 billion on public infrastructure over the next five years, taking government investment to levels not seen for almost 50 years. This suggests a potentially significant boost to the civil engineering sector, although some economists have expressed doubt ...

Computer Security - UK

“The potentially serious consequences of cyber-attacks in an increasingly digital and connected society is exacerbated by the extreme PR damage from security

integration. Services that have the human touch are also helping to ...

Beauty and Personal Care Retailing - Spain

“Beauty and personal care specialists in Spain have been focusing on strengthening their ecommerce presence, but they continue to face strong competition from non-specialist retailers across the board. They are turning their attention back to their stores to improve the multichannel shopping experience, hoping to entice consumers with new tech ...

Black Consumers and Shopping for Groceries - US

“While convenience is important, grocery shopping is also a sport for most Black consumers, who are engaged in finding the best deals at the best stores. Shopper segments are based on their attitudes on convenience and further distinguished by how they balance product value between trusted brand names and price ...

Challenger Brands - US

“Across many major food and drink categories, smaller competitors are gaining market share at the expense of the big national brands that have long held dominant positions. The success of challenger brands is being driven by a new generation of shoppers, more open to new ideas in general and far ...

Coastal and Heartland Consumers - US

“Where people live can shape their attitudes and behaviors. However, even though the media paints two very different pictures of Heartland and Coastal Americans, there are more similarities than differences between the two consumer groups. From organizational trust to overall life satisfaction, Heartland and Coastal adults display more nuanced differences ...

Consumer Approach to Nutrition - US

Consumers’ views on nutrition and diet are varied, but, regardless of preferences, taste reigns supreme. Despite

breaches that gain major media coverage. For these reasons, and regulatory intervention, there has to be a continued focus on computer security at all levels, which is driving ...

Consumer Snacking Trends - China

“As the purposes for snacking diversify, brands should seize the opportunity to better serve consumers’ special and fragmented demand. Higher requirements towards nutrition from snacks among consumers with kids demonstrate opportunities to use nutritious ingredients in snacks designed for children. The rise of social snacking also suggests snack brands can ...

Consumers and Saving - UK

“When it comes to saving and making the most of their finances, the majority of people are reluctant to receive direct help from financial services providers. Attitudes tend to vary greatly depending on demographics, particularly age, but consumers of all generations agree that technology helps them to be better at ...

Creating Loyalty in Automotive - US

"Consumer loyalty is prevalent in other industries, whether it's consumers shelling out \$500 for a Dyson vacuum or the diehards that only shop at Trader Joe's. Consumer loyalty, while not always obvious, is still alive and well for some brands. And despite the many songs that have been written about ...

European Retail Briefing - Europe

This month's European Retail briefing includes:

Family Dining Trends - US

the media attention dedicated to specialized and trending diets, the vast majority of consumers prefer a simpler approach to eating, and desire flexibility in their meal choices. In fact, more consumers do not define ...

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

“Desire for open-plan living is fuelling a trend to extend or knock through to create larger living spaces which act as a home hub for family and entertaining at home. In turn this means more of the home is on view, creating demand for individual styling and higher average spend ...

Consumers and the Economic Outlook - US

"The majority of consumers consider their finances to be healthy, and views of the future seem to be positive as well. Consumers are saving for the future, but are still willing to treat themselves."

- Jennifer White Boehm, Associate Director - Financial Services & Auto

Digital Trends Quarterly - UK

“The nascent foldable phone segment remains the most interesting one, but is a device category that is still a long way away from seeing mainstream adoption. The majority of competition is still focused around core features like battery, screen and camera quality, and manufacturers are continuing to invest heavily in ...

Families - UK

“Recent years have seen a transformation in how brands represent families in marketing, with significantly improved representation of Britain’s diverse family types. However, as the UK population becomes ever-more diverse, there remains scope for brands to take a more educational approach in campaigns, helping to support parents and schools as ...

Family Vacations - US

"Parents are among the heaviest users of restaurants and off-premise restaurant business due to the convenience, speed and quality family time they provide, and this is especially true for fast food restaurants. Fast food continues to win family dining business with its aforementioned speed and convenience, affordable prices, kid-friendly amenities ...

Fashion Accessories - UK

"Fashion accessories are expected to have performed well in 2019, mainly due to the continued growth of the luxury market. However, the future of the category is difficult to predict due to the uncertainty still surrounding Brexit. High street specialists have been underperforming over the last couple of years and ...

Foodservice - Brazil

"Diante de um consumidor que demonstra certa resistência em frequentar novos restaurantes e experimentar novos pratos, o mercado de foodservice tem o desafio de ampliar seu alcance para além de pizzarias e lanchonetes, e aumentar sua frequência de consumo em geral. Para tanto, precisa investir em opções saudáveis nos menus ...

Hair Colourants - UK

"Demand for hair colourants has been subdued by the pro-ageing movement, with older consumers opting to embrace their greys rather than cover them. Young consumers have remained engaged but favour lower-value temporary products, suggesting that brands need to find ways to encourage them to spend more. Personalisation will be crucial ...

Haircare - China

"Consumers' awareness of hair and scalp care both increased in the last year, though anti-hair loss and hair volumising are yet to take off, as consumers' attention is more focused on obvious hair issues like split ends and dryness. But 25-29 year olds are worrying about hair volume more than ...

Hispanics and Shopping for Groceries - US

"Parents of children under the age of 18 in the household want both escape and enrichment from their vacations. Families feel economically secure enough to spend money on vacations, though parents feel their ability to take vacation is constrained by their work schedules. As such, they look for efficient ways ...

First Aid - UK

"The value of the first aid category has fluctuated in recent years and is estimated to show significant decline in 2019 due to reduced NPD and competition from the private label sector. Future growth will come from brands offering consumers added value propositions, as well as engaging with them using ...

Fruit Juice, Juice Drinks and Smoothies - UK

"The spotlight on sugar has put pressure on the category for several years now, but emerging health trends offer opportunities for these products to promote their health credentials. Growing focus on the importance of fibre points to NPD potential in fruit juices and smoothies, while the trend for reducing alcohol ...

Hair Colourants and Styling Products - China

"Hair colourants, in consumers' minds, work as a display of fashion, rather than serving as a cover for aged grey hair. The widely held keenness towards trendy hair colours implies that brands need to alter their product images via marketing communications to present in a more fashionable way to attract ...

Health Management Trends - US

"The start of a New Year and new decade has people inspired and setting numerous goals to improve their health and wellbeing. While setting goals is the first step, it's also the easiest. It's keeping the motivation throughout the entire year, and even decade, that most people need help with ...

Holiday Review - UK

"The Thomas Cook collapse has had no impact on travellers' faith in the package holiday market. However,

"When shopping for groceries, Hispanics follow a different path compared to the average US consumer. Hispanics' search for value means they shop at a variety of stores, and traditional supermarkets lose out to mass merchandisers. Convenience and quality are top motivators for choice of retailer, but compared to the average ...

Influencers - UK

"Brands increasingly have to look beyond surface level metrics, such as follower numbers, when deciding which social media influencers to partner with. Influencer authenticity, trust and engagement levels play a key role in actually impacting purchasing behaviour, often making micro influencers more valuable than those with larger followings."

– ...

Innovations in Travel - Canada

"The majority of Canadians have taken a leisure trip in the past year, with non-US international travel a healthy segment in the category. Consumer sentiment aligns with this narrative with many citing a preference for international trips as opposed to domestic destinations. Younger Canadian travellers are a tech-savvy bunch that ...

Major Sporting Events - UK

"Strong public interest in major sporting events will take on a wider significance in the coming decade as the UK seeks to use its status as a top tier sports host to promote post-Brexit Britain on the global stage."

– David Walmsley, Senior Leisure Analyst

Meal Planning & Preparation - Canada

"The dreaded question "what's for dinner?" is one that some 88% of Canadians are responsible for addressing during the week. While the large majority of Canadians plan ahead for weeknight dinners, only about half are successful in seeing their plans through, meaning that there is a need for more ...

many will be cautious when booking a package holiday, trusting their holidays to the hands of well-known companies that provide high quality customer experiences."

Influenciadores de Beleza - Brazil

"Os influenciadores de beleza ganharam posição de destaque entre os consumidores, e graças a seu sucesso nas redes sociais, migraram para o varejo de produtos de beleza e cuidados pessoais, criando marcas próprias e reafirmando seu potencial no segmento. As marcas, por sua vez, passaram a firmar parcerias com os ...

Luxury Fashion - US

"Luxury purchases aren't exclusive to affluent consumers, as many see value in investing in their appearance. Consumers can rationalize purchasing high quality, high use items and do so from brands that cater to them, offering better return on their investment. However, consumers want reassurance before buying, seeking to avoid buyer's ...

Managing a Healthy Lifestyle - UK

"Belying the fairly bleak picture of the nation's health, commercial opportunities for companies to engage with consumers by providing health-boosting help and support have never been greater. Consumers exhibit a keen appetite for the latest technological health solutions, with DNA-tailored solutions and sophisticated biometric tracking likely to become increasingly popular ...

Menu Trends - UK

"With more consumers making conscious choices based around their health, animal welfare and environmental concerns, menu offerings that do not reflect their changing values and priorities will fall behind. That means marketing messages which explain how food is prepared and what ingredients it contains should cater to the thoughtful consumer ...

Milk and Milk Alternatives - Ireland

“The growing media attention around the impact animal milk has on the environment has seen Irish consumers increasingly switch to milk alternatives. Highlighting the steps that they are taking to reduce their carbon footprint will enable milk producers to demonstrate their green credentials to increasingly eco-conscious consumers.”

– James ...

Multicultural Marketing for Financial Services - Canada

“It is becoming increasingly important to initiate relationships with immigrants in their home countries prior to their landing in Canada to gain a first mover advantage.”

– Sanjay Sharma, Senior Financial Services Analyst

PC Gaming: Desktops and Laptops - US

“From older casual gamers playing simple card games on their home computers to younger gamers investing in dedicated gaming hardware, the PC gaming audience encompasses a vast array of interests. A lack of brand loyalty, coupled with a desire to optimize the gaming experience, makes PC gamers an important audience ...

Private Label Food and Drink Trends - US

“Private label sales continue to grow, even in the wake of a largely positive economy that sees consumer confidence remaining high. Where value used to be the primary driver of private label food and drink choice, consumers are sticking with those brands and have even expanded their private label purchase ...

The Arts and Crafts Consumer - China

“The arts and crafts industry is emerging as a new type of leisure activity in China. To further increase consumer involvement, brands can position arts and crafts projects as facilitators of personal and social gain,

Mobile Apps - China

“Consumers may be easily converted when it comes to apps that can provide further convenience, yet they are also hyper-vigilant about the ownership of personal data. As China leads the world in developing mature data privacy-related policies, mobile app developers are left to face a more intense market, expected to ...

Nail Color and Care - US

“To prevent the nail color and care market from further declines, brands in this space must alleviate concerns over chemicals and nail damage. The growing shift in preferences from nail polish to alternatives demonstrates opportunities for growth. Brands that emphasize nail health and natural formulas can potentially remedy losses and ...

Personal Audio: Headphones & Speakers - Canada

“Personal audio is one of the most important accessories in the broader tech market. While central devices like smartphones, tablets and personal computers drive the overall industry, personal audio products are needed to access the growing demand for content – whether it is music, movies, video games or any other ...

Savings - Ireland

“Preparing for a rainy day continues to be a key motivator to save among Irish consumers – and this has helped to propel growth of total deposits by Irish consumers between 2015 and 2019. Moving forward, as employment levels continue to increase and debt levels fall among the population it ...

The Gig Economy - US

“Working multiple jobs to bring in extra income is nothing new – just ask a substitute schoolteacher, bartender, or photographer. But in today’s economy, the proliferation of multiple “unicorn” tech startups has

such as making crafts projects as a way to learn new skills, celebrate unique moments ...

The Recreational Cannabis Consumer - US

"As of October 2019, two additional states have legalized cannabis for adult recreational use, Michigan and Illinois, bringing the total number to 11 states and the District of Columbia. Statewide initiatives for legalization and expectations for the sales potential of cannabis are getting a lot of attention, yet the market ...

UK Retail Briefing - UK

This month's UK Retail briefing includes:

White Spirits and RTDs - UK

"Fuelled by exponential growth in the popularity of gin, the white spirits category has elevated innovation in recent years to explore new flavours, colours and ingredients. However, brands will need to aim for uniqueness, sustainable credentials and provenance going forward to create premium, standout products that can weather increasing competition ...

洗发护发产品 - China

"过去一年，消费者的头发和头皮护理意识均有提升，但防脱发和增加发量尚未真正崛起，因为消费者的注意力更多集中在明显的头发问题上，比如干枯和分叉。但25-29岁消费者比年长的消费者更为担心发量问题，说明增加发量的产品在年轻消费者中大有潜力。不健康的生活方式、压力/抑郁和污染是脱发的元凶，这表明在营销中可运用这些因素以获得消费者共鸣。"

造型和染发用品 - China

"在消费者心中，染发产品是为了彰显时尚，而不是为了遮盖白发。对流行发色的广泛热情说明，品牌需要通过营销沟通转换产品形象，以更时尚的方式展示产品，吸引消

changed the landscape of our on-demand society, offering more options not only as a consumer, but as a ...

The State of the eCommerce Industry - US

"The ecommerce market continues to expand thanks to new technological developments that create a seamless and convenient shopping option. As consumers blend their shopping journey between online and offline actions, even online retailers need to be present in physical stores in some way. eCommerce offers retailers ways to connect with ...

Unsecured Loans - UK

"The personal loans market enjoyed bumper growth through most of the 2010s. However, as the decade has come to an end, growth has slumped, due to tightening lending criteria and weakened appetite among consumers to make financial commitments amid Brexit uncertainty. Despite this, signs for the future are positive, with ...

手机APPs - China

"当出现能进一步提供便利性的app时，消费者可能会轻易地转移注意力，然而，他们也高度警惕个人数据的所有权。在制定成熟的数据隐私相关政策方面，中国走在世界前列，因此手机app开发商面临着竞争更加激烈的市场，消费者期待这些企业提供即时的优质内容、科技型创新和安全的用户体验。"

— 许昕远，初级研究分析师

空气清新产品 - China

"消费者对空气清新产品的需求有所转变，从作为去除异味的功能性产品转变为关注改善室内空气质量、提升家居氛围和情绪等促进个人身心健康的产品，后者将是未来的关键增长动力。空气清新品类新产品的研发和营销需要跟进这种转变，例如应对室内污染物（如甲醛）、采用芳香疗法宣称、提供更天然的产品等。"

— 李玉梅，高级研究分析师

零食消费趋势 - China

"随着消费目的的多样化，品牌应抓住机会，更好地满足消费者特定且细分化的需求。有孩子的消费者对零食的营养价值要求更高，品牌可以通过在为儿童设计的零食中添



费者。”

– 尹昱力，初级研究分析师

加营养成分来满足他们的需求。零食社交的兴起也表明品牌可利用社交属性来升级产品。”

– 鲁睿勋，研究分析师

Upcoming Reports

手工艺爱好者 - 中国 - 2020年1月