

November 2018

Artisan Food - Ireland

“Concerns around food safety and quality have seen the issue of traceability become increasingly important to Irish consumers. More widely adopting tracing technology and highlighting their traceability procedures will help specialist food retailers to provide consumers with more information about the origin of their products and reinforce their quality credentials ...

Car Aftermarket - UK

“The parts aftermarket is strongly affected by external factors with the recent depreciation in Sterling stimulating inflationary pressures across the sector. However, in the case of tyres, such a development has also narrowed price differentials resulting in a move away from value brands as well as reducing volume sales. Looking ...

Character Merchandising - US

“Licensed merchandise is big business, valued at \$111.4 billion, and character merchandise represents the lion’s share (12.1%) of it. Blockbuster movies, TV shows, and other forms of media content all drive enormous demand for character merchandise, but the industry needs to look for new avenues for growth to ...

Commercial Borrowing - UK

“All businesses look to financial institutions for lending in order to make vital growth developments and other operational processes possible. Whilst the structure of commercial borrowing continues to change with the emergence of new alternative lenders, mainstream lenders must continue to offer the most suitable products for companies so that ...

Consumers and the Economic Outlook - Quarterly Update - UK

“Financial well-being and confidence was lower in each of the three months to October than we reported throughout the summer months. This matches the stagnant economic performance in August and September. Overall though, most consumers are still getting by, and remain relatively optimistic about their

Beauty Retailing - Brazil

“Brazil's beauty retailers still perform simple actions to attract consumers to their stores, compared to what has been done in countries such as the US. The competition is getting increasingly fiercer, as pharmacies merge to become stronger and big players in the sector buy smaller brands to increase their ...

Car Usage Habits - China

“Consumers are driving for long-distance purposes a lot less frequently this year. As such, some functions that improve the in-city driving experience, such as LATCH, HUDs and Bluetooth speakers, are now more important than ever before. Compact cars and compact SUV are still the most owned types of car. Consumers ...

Childrenswear - UK

“The childrenswear sector is faring well due partly to a growing population of children in the older age groups (10-14-years-old) and a growing interest in fashion-led clothing for children and teens. However, while clothing specialists and supermarkets are flourishing in the childrenswear space, specialist childrenswear retailers are struggling. The large ...

Consumers and Gadget Insurance - UK

“People want to keep their devices for longer and are keen to protect them. Gadget insurance has a strong case in a world of expensive, indispensable technology and sustainable-minded consumers. Simple, relevant products that provide clear value appeal to owners, but insurers also need to find a spot at the ...

Dark Spirits - US

“The dark spirits market continues to thrive due primarily to the strong growth of American whiskey. Consumer interest in craft products as well as changes in drinking habits and preferences have benefited many dark spirit brands, especially super- premium brands. Dark spirit drinkers tend to be enthusiastic about dark spirits ...



financial future.”

– Rich ...

Defence Industry - UK

“As the cost of weapons escalates - with each new military-jet engine costing over \$1 billion to develop - even the biggest defence firms are looking at forming alliances. Many will be determined case-by-case depending on the systems involved. Such deals allow companies to gain scale by combining resources with other firms ...

Digital Video - US

“As new players enter the streaming market and established names invest in unique consumer experiences, digital video platforms are staking their claim in a crowded media landscape. The domination of a few key players and increasing consumer interest have bolstered revenue, but made it difficult for new entrants to convince ...

Electricity Industry - UK

“A key focus for distribution network operators is the development and roll-out of innovative smart grid technologies to support the growing clean energy capacity coming onto the grid and to help the transition to a more flexible energy system. According to government estimates, smart grids could also reduce the cost ...

European Retail Briefing - Europe

This month's European Retail Briefing includes:

Fish and Shellfish - US

“The \$18 billion fish and shellfish category enjoys widespread consumer participation but still lags behind other more “every day” proteins. Sales increased 13% in the past five years, driven by growing commodity prices

Digital Content Consumption - Canada

“The vast majority of consumers who have performed online activities have done so at least once per month. This includes online activities such as reading/watching news online, reading articles on websites, reading articles on social media, watching videos on social media, viewing/sharing photos online, using a video streaming ...

Dining Out Dayparts - US

“Restaurants are facing increased daypart competition from retailers as well as a decline in traffic overall, but particularly for the three traditional dayparts. To combat growing threats, foodservice operators will need to leverage more on-demand dining and nontraditional dayparts, and target young people, who are the biggest consumers of both ...

Estate Agents - UK

“The market continued to record growth in 2018 amid challenging conditions, namely uncertainty related to Brexit, ongoing undersupply and flat residential sales. Looking forward, the market is set to face continued uncertainty as the UK looks to formalise its exit from the EU. Future prosperity remains subject to the manner ...

Exercise Trends - US

“The majority of US adults are exercising, but not with strong intensity. The strong association between exercise and health is expected, though emotional benefits including positivity also align with being active. Since the majority of consumers are working out at home, fitness equipment brands have an opportunity to appeal to ...

Foodservice Online Ordering and Delivery - US

“Restaurant delivery and carry out continue to be a bright spot for the foodservice industry with use being

and consumer interest in healthy, high-protein foods. A healthy reputation is one clear advantage that fish and ...

Fragrances - Brazil

"The fragrance market in Brazil has had one of the best performances in recent years when it comes to retail sales. The national brands expanded their sales channels and brought new fragrances to the market, which, combined with the Brazilian habit of using perfume, helped increase sales. The category, however ...

Global Spa Tourism - International

"As spa tourism becomes more wellness-orientated, a growing number of spas are juxtaposing holism with modern medicine and entering the global 'medi-spa' market. Technology is also now at the forefront of the spa industry, from booking treatments online to social-media apps, promotions and offers."

- Jessica Kelly, Senior Tourism Analyst

Health Insurance - Canada

"As Millennials are less likely to have employer coverage and more likely to buy health insurance directly, insurers may want to enhance their digital offerings and capabilities to increase online sales."

Healthy Lifestyles - US

"Although nearly nine in 10 Americans feel they lead at least "somewhat healthy" lifestyles, self-perceptions do not always align with reality. A positive assessment doesn't mean that people are not looking for improvement. In fact, one third say they are actively trying to improve their health by a lot. However ...

Hotels - UK

driven by consumers across generations looking for convenience and younger consumers looking to relax at home. The majority of consumers still prefer to order directly from restaurants, but interest in third party ...

Gastrointestinal Remedies - UK

"In a mature market, finding growth can be a challenge. Gastrointestinal remedies has faced this issue, but brands have benefited from an increase in consumers seeking to alleviate GI symptoms arising from stress, IBS and shifts in dietary habits. With these issues likely to continue, the market is set to ...

Grocery Retailing - China

"As fundamental as their needs for grocery goods are, grocery shoppers' habits are changing. Grocery shopping occasions will become more diverse, and consumers are becoming sophisticated and demanding. Rather than being all things for all people and competing with scale, future competition will be about identifying individual market segments and ...

Health Supplements - China

"Parents have the intention to purchase health supplements for their children, especially probiotic supplements. Brands should develop a professional and international brand image to earn consumers' trust, particularly since e-commerce is emerging. Enhancing product options and innovations is also important to attract consumers."

- Vicky Zhou, Research Analyst

Homewares Retailing - UK

"The homewares market has always been fragmented, but this has increased as a number of clothing brands launch homewares collections while supermarkets reconfigure their non-food offering in an effort to offset challenges in their own sectors. Meanwhile the homewares market continues to grow, as an increasing population of renters seeks ...

How Online Shopping for Home Decor is Evolving for Consumers - US

"There is relatively little new product development in the mid-market tier where brands tend to be weaker and less differentiated, and risk being squeezed between the more dynamic economy and upscale sectors. However, demand for mid-market hotels remains strong and many consumers are willing to pay 'a bit extra' for ...

How Social Media and Product Reviews Impact Online Shopping - US

"Online purchasing decisions can be swayed by social media posts or the quality and tone of product reviews. Because consumers can't see or feel products before buying online, they are looking to social media and product reviews to learn more about products, shape opinions, and determine whether or not to ...

In-store Bakery Experience - Canada

"Canada's grocery retail landscape is changing. While much of the chatter revolves around online shopping, the fact remains that most grocery "trips" happen on site. That said, the evolving divide between online and bricks and mortar means that to maintain an advantage, retailers are increasingly pressured to offer experiences that ...

ISAs - UK

"Despite the difficulties faced by UK households looking to boost their savings, the decline in the ISA market has been halted in the last 12 months. Rising interest rates will act as a greater incentive to save, while stocks and shares ISAs continue to increase in popularity. The lifetime ISA ...

Leites e Bebidas Vegetais - Brazil

"Apesar de o consumo de bebidas vegetais no Brasil ainda ser nichado, a busca do consumidor por saudabilidade deve impulsionar a expansão da demanda por esses produtos. Grandes marcas já vêm apostando no segmento, indicando que num futuro próximo esse mercado deverá se consolidar. A indústria de lácteos poderá sentir ...

Luxury Travel - UK

"A lot has happened in the last few years of online shopping, with the home furnishings category evolving along the way. Pioneers of the online décor market have continued to make advancements through tools and features, making the online shopping experience easier and more realistic, such as Wayfair's "view in ...

Ice Cream - UK

"The scorching 2018 summer has been a boon to the ice cream market, fuelling sales growth at a time when cost pressures are putting a squeeze on operators. Lower-calorie ice cream brands have caused a stir in 2018, building up a not insignificant market penetration. While the lower-calorie proposition has ...

Innovations in the Insurance Market - US

"The insurance industry is competitive, as most people make their insurance choices based on price. Although the industry is flush with technological innovation, consumer loyalty is yet to be significantly impacted by these developments. Because it is easier to attract new, young customers than it is to get older ones ...

Kids' Snacking - UK

"That efforts to limit the amount of snacks children eat are near universal and parents are switched onto the importance of snacks being healthy is welcome news for PHE and indicates that the industry's efforts to improve the healthiness of their products will appeal. Healthier versions of popular children's snacks ...

Luxury Cars - US

"The luxury car market is expected to account for slightly over 14% of the total vehicle market for 2018, growing from 13.4% in 2013. With a growing economy, high consumer confidence, and improving wages, more and more consumers are able to splurge on a luxury vehicle. Brands will need ...

Managing a Healthy Lifestyle - UK

“With more brands entering the luxury travel market, it becomes even more important for luxury travel brands to claim their position, differentiate from their competitors and increase brand loyalty. Offering flexibility, personal advice and good deals is key to achieving this.

Marketing to Black Moms - US

"Black moms' lives are totally consumed with taking care of their children, making most decisions regarding their lives on her own. She looks to technology to help her feel organized, reduce her "mommy load," and maximize her budget. Her dreams lead with spending more time with her kids, followed ...

Marketing to Teens - China

“Although today's adolescents are more assertive and individualistic, which is related to democratic family environments, they still share a lot in common. A strong interest is shown in aesthetics and humane knowledge. They do not reject advertising per se, but demand humour and high-quality contents, which can serve as ...

News Consumption - TV, Print, Online and Social - UK

“Consumers are split in regard to how much they trust social media platforms to make judgements on the trustworthiness of news sources. Until any new regulations are put in place, social networks have to work to reduce the prominence of inaccurate news sources, while reassuring users that political or social ...

Paint and Wallcoverings - US

"An improved economy coupled with genuine interest in décor is benefitting the paint and wallcoverings market, which is viewed as a feasible way to refresh and update the look and feel of a room. As the emerging generation of new DIYers engages in wall projects that allow them to add ...

Pizza and Italian Restaurants - UK

"Consumers' desire to cook pizza or Italian food at home as well as the rise of "more adventurous cuisines" is forcing operators to innovate with menu choices and retail formats in order to maintain demand. While the

“There are a number of obstacles in the path of holistically healthy lifestyles, with the most commonly cited barriers being lack of motivation, lack of time and expense. Encouragingly consumers are very open to guidance and advice, helping them to cut through the all the noise around health and steering ...

Marketing to Hispanic Moms - US

"In the US there are almost 8 million Hispanic moms with children under the age of 18 in the household. Product of this impressive number, Hispanic women are more likely than the average US woman to be a mom. The fact that one in four babies born in 2016 were ...

Milk and Milk Alternatives - Brazil

"The consumption of plant-based drinks in Brazil is still limited, but health concerns should boost the demand for these products. Big brands have been investing in the segment, an indication that in the near future the market of plant-based drinks should be consolidated. The milk industry, therefore, is likely to ...

North Africa Outbound - Africa

"North Africa's outbound market is witnessing mixed fortunes. Algeria is the rising star in a region troubled by economic and political hurdles, restricting overall market potential. Nevertheless, the North Africa outbound market reached an estimated 11 million departures in 2016."

Pay TV - US

"Television is an essential element of nearly all US homes. The pay TV industry is going through a period of rapid change, with traditional cable and satellite companies now competing for market share against a host of new streaming contenders. During this transformation, corporations and consumers alike have been struggling ...

Price Comparison Sites in Financial Services - UK

“Price comparison websites dominate the insurance market, but are less prevalent in other areas of financial

spate of emerging pizza or Italian fads looks to have potential to retain ...

Processed Poultry and Red Meat Main Meal Components - UK

“Health and environmental concerns have prompted many people to cut back on processed meat. However, premium products can tap into the widespread ‘less but better’ mindset to support value growth. Meanwhile eco-friendly packaging and carbon offset guarantees are promising means for companies to demonstrate their environmental commitments.”

– Alice ...

Soft Drinks - Ireland

“The summer of 2018 helped to drive sales value forward, but increasingly consumers are wary of the environmental impact of plastic – and unless soft drinks companies can introduce more environmentally-friendly packaging and policies, they could see sales suffer”

Supermarkets - Europe

“Mintel’s report on supermarkets in Europe paints a picture of a sector struggling with the problems of maturity. There is much less scope for new store development in Western Europe, while competition is increasing. Aldi and Lidl are expanding hard on the back of their improved formats, and online competition ...

Supermarkets - Germany

“The German grocery retailers are struggling to overcome the issues related to operating in a very mature sector. Growth has to come from taking share from each other but the propensity of German consumers to split their spending across wherever is most convenient, best value or highest quality makes it ...

Supermarkets - Spain

services. More needs to be done to improve the search journey for products like current accounts and credit cards, such as by offering better filtering tools and capturing consumer preferences.”

– Jessica Galletley ...

Small Business Overview - UK

“Over 99% of companies in the UK are small businesses. There are more than 5.7 million and they account for 34.5% of the overall economy, at £1,428.4 billion. They also account for 39% of all employment in the UK. In the last five years, their overall ...

Supermarket Retailing/Brand Importance - Ireland

“Supermarket retail sales are forecast for continued growth in 2018/19 but with the increasing uncertainty surrounding Brexit, many NI consumers are already feeling the pinch with food prices rising and a noticeable increase in supermarket prices. Market leaders will need to do more to deliver on price and quality ...

Supermarkets - France

“Grocery retailing in France is changing – people are shopping less at hypermarkets and more at local, convenience stores. The digital world is making shoppers more demanding and online grocery is beginning to develop beyond the Drive click and collect model. Several retailers have introduced rapid home delivery services in ...

Supermarkets - Italy

“Although consumer spending and retail sales growth appears to have slowed in 2018, the leading grocery retailers in Italy have continued to perform well. As a result, there is ongoing consolidation in what has traditionally been a highly fragmented market. Once reluctant to embrace the online channel, most of the ...

Supermarkets - UK

“Retail sales are growing again in Spain. Consumers look for low prices, and value for money, but they also rate fresh foods as very important in choosing where to shop. Mercadona has cottoned on to that demand and we think that the discounters are doing so as well. The conditions ...

Tea Shops - China

“Consumers are mostly taste-led when choosing tea shop drinks, and they would like to pay more for natural and fresh ingredients. The seemingly non-stop innovation activity in this foodservice area has been driving much of the business revenue. As more consumers, including the young generation, pay attention to the nutrition ...

The Millennial BPC Consumer - UK

“As the largest generation in the UK, appealing to Millennials is important but challenging. Communication to this group about their appearance should be sensitive and inclusive, as many feel under pressure to keep up with peers. Innovation can be either light-hearted and fun, or reflective of Millennials’ changing lifestyles, but ...

Travel and Tourism - Azerbaijan

“On the cusp of Europe and Asia, this safe and scenic oil-rich nation on the Caspian Sea is rapidly emerging as a tourism player. With an hospitable culture, it offers something for everyone, from luxurious modern city breaks to historic journeys along the ancient Silk Road, and a burgeoning eco- ...

Travel and Tourism - Macau, China

“After more than a decade of impressive visitor and expenditure growth driven by its multi-faceted casino resorts, Macau is promoting itself as a World Centre of Tourism and Leisure, and is focusing on new family attractions and business-convention facilities to attract a broader visitor mix and increase the average length ...

Travel and Tourism - Taiwan, China

“The supermarket sector is growing once more, but this growth has not been enough to stem the tide of spending moving away from large-format stores. This decade has seen unprecedented change in both how grocery shoppers behave and how the sector is structured. Consolidation, on both the retail and supply ...

Technology Habits of Families - UK

“Parents are tasked with making sure their family has a healthy relationship with technology. Access to tech can have huge benefits, supporting family communications and other aspects of home life, as well as a child’s education and their own social life. However, these benefits must be balanced against the potential ...

The Senior BPC Consumer - UK

“The senior BPC consumer has much the same aspirations to feel confident and look attractive as their younger counterparts, however the desire for age representation suggests that the category is still not catering to their individual needs. Despite the shift in the way ageing is discussed in brand communication, there ...

Travel and Tourism - Kyrgyzstan

“Kyrgyzstan’s location on the Silk Road and in two of the world’s major mountain ranges, the Tien Shan and the Pamirs, gives the country fantastic cultural and natural advantages. Dramatic, snowy mountain peaks and extensive valleys, numerous glacial lakes, verdant summer pastures or ‘jailoos’, along with several UNESCO Silk Road ...

Travel and Tourism - Mongolia

“The fortunes of Mongolia’s international tourism sector have been mixed in recent years, with sustained annual growth in the number of foreign visitors seemingly elusive. The year 2017, however, appears to have marked a big turning point with the number of international tourists growing by 16.1%. The Mongolian government ...

Travel and Tourism - Uzbekistan

“In 2017, North East Asia recorded 150.5 million international visitors – up from 127 million in 2013. A number of factors account for this marked increase in the number of tourists – strong interregional travel due to better air connectivity, vibrant economies and the emergence of a middle class ...

UK Retail Briefing - UK

This month's UK Retail briefing includes:

Visitor Attractions - UK

“A long, hot summer gave welcome impetus to the UK visitor attractions market in 2018, but it is the economic climate that remains the strongest determinant of the sector's size and shape, particularly through its influence on consumers' holiday choices.”

Wearable Technology - UK

“Smartwatch sales are beginning to overtake those of fitness bands and sports watches as lines between the devices blur. Consumers are seeing real health benefits in the data collection and analysis such devices can provide, with many motivated to exercise more. While wearable technology brands continue to innovative across the ...

Western Spirits - China

“The rising middle-class is fuelling the accelerating recovery of Western spirits in China. With fast adoption of e-channels and growing Western cultural influence, both opportunities and challenges are presented to market players; operators need to find a way to make Western spirits fit into modern Chinese lifestyles. The consumer groups ...

保健品 - China

“父母有意为孩子购买保健品，特别是益生菌保健品。品牌需要打造一个专业和品牌的品牌形象以赢取消费者的信

“Uzbekistan's tourism is headed in an upward trajectory both in terms of arrivals numbers and an encouraging investment environment. Although the country is rich in cultural heritage attractions, it is aiming to expand its tourism offerings such as ecotourism, adventure tourism and gastronomy, to appeal to a broader tourist base ...

Varejo de Produtos de Beleza - Brazil

“O varejo de beleza no Brasil ainda realiza ações simples para atrair os consumidores às suas lojas, se comparados com o varejo de países como Estados Unidos. A concorrência está cada vez mais acirrada e vemos farmácias realizarem fusões para se tornarem cada vez mais fortes e grandes players de ...

Wearable Technology - Canada

“Wearable technology represents the next step in personal technology. Computers, smartphones and tablets have all entered the market and established themselves as ubiquitous devices owned by the vast majority of consumers. With the emergence of wearable tech, its goal is to become as valuable as those other pieces of personal ...

Weight Management - US

“More than 206 million adults in the US are currently managing their weight. While the audience is sizeable, the challenge for industry players is that the majority are following a self-guided approach to weight management. This could point to why the obesity rates continue to rise. Trends toward body acceptance ...

Wine - US

“Total US dollar sales of wine should reach \$62 billion in 2018, for overall growth of 15% since 2013. The growth rate has slowed since a 4.2% bump in 2015, settling to a more moderate 1-2% annual growth projected through 2023. Wine growth has outpaced total alcohol, while wine ...

婴幼儿辅食 - China

“随着更严格的法规出台，现在家长对于以包装婴幼儿辅食喂养孩子更有信心。未来5年，伴随家长的强烈升级意

任，特别是随着保健品电子商务的影响。为了吸引消费者，扩大产品选择和加大创新也必不可少。”

汽车使用习惯 - China

“今年消费者长途驾驶的频率较以往大幅下降。因此，一些改善消费者市区内驾驶体验的功能（比如儿童座椅接口、HUD和车载蓝牙音箱和语音助手）变得比以往更为重要。紧凑型车和紧凑型SUV仍是拥有率最高的车型。拥有新能源车的消费者大多是为了上下班通勤而充电。”

— 周同，研究分析师

西方烈酒 - China

“中国中产阶级的兴起加快了西方烈酒市场的复苏。消费者迅速接受了电商渠道并受到西方文化的影响，为品牌带来了机遇与挑战；经营者需探索将西方烈酒融入现代生活的方式。品牌可推出更复杂精细的产品，以吸引那些对该品类有所了解的消费者。”

— 徐文馨，高级研究分析师，食品和饮料

食品杂货零售 - China

“尽管购买食品杂货属于消费者的基本需求，但消费者的习惯正发生改变。食品杂货购物场合将更加多元化，消费者也日趋成熟挑剔。未来的市场竞争将不再聚焦提供适合所有消费者需求的产品，或者在规模上发力，而是将围绕定位个体细分市场，力争成为‘小市场的大品牌’。”

愿，市场总体销售额预期将维持稳健增长。市场上采用有机、本土、功能性宣称的产品引发更多的关注。在挑选产品时，消费者变得更加理性，并且着重考虑最适合宝宝的产品。他们对新兴购买渠道和信息来源的态度开放，使营销人员和目标消费群体间的互动更丰富多样。”

— 吴丝，研究分析师

茶饮店 - China

“消费者在选择茶饮店饮料时，最看重的是饮料的口味，而且愿意溢价购买采用天然和新鲜成分的饮料。在这一类餐饮服务业里，创新活动似乎始终未曾停止过，由此也持续不断带动营收。由于越来越多消费者（包括年轻一代）重视饮料含有的营养价值，茶饮店因此可以把更多种粗粮或传统汉方草本加进饮料里，借此满足消费者对健康饮品和养生的需求。”

— 王皓，助理研究分析师（食品和饮料）

针对青少年的营销 - China

“虽然如今的青少年更加有主见和个性（与更加民主的家庭环境有关），但其共性特点仍占主导，并表现出对艺术和人文知识的浓厚兴趣。他们并不排斥广告，但对内容质量和幽默感有更高的期待，有趣的内容可以成为他们日常的‘社交货币’用以增进朋友交流。在零食方面，健康和功能性的宣称会更加受到青睐。”

— 赵鑫宇，初级研究分析师