

February 2018

Accounting and Financial Management - UK

“Many recent acquisitions by major accountancy firms have revolved around the technology space, such as big data, analytics and digitisation, which is playing an increasingly important role in consultancy services. This trend is set to continue, with larger firms looking to strengthen their multi-disciplinary skills and advisory practices through medium-sized ...

Alcoholic Drinks Review - UK

“Many consumers are moderating their alcohol intake, putting pressure on the industry. However, consumer interest in low- and non-alcoholic drinks and widespread quality over quantity mindset suggest opportunities for brands to stay on the menu.”

– **Kiti Soininen, Category Director, Food & Drink**

Attitudes towards Healthy Eating - UK

“The income squeeze coupled with the perceived expense of healthy food has the potential to curb the overarching healthy eating trend. However, it also opens ripe opportunities for retailers to provide more support for shoppers in making choices which are both healthy and price savvy – doing so should promote ...

Baking and Dessert Mixes - US

The market for baking and dessert mixes is a large one, valued at nearly \$4 billion. However, it continues to shrink, following a pattern that has endured for much of the past decade. That lack of growth is not necessarily the result of consumer dissatisfaction, but it is resulting more ...

Beauty & Personal Care - Ireland - Ireland

Air Care - US

Sales in the air care industry remain nearly flat from 2016-17, contracting 0.3% to reach just more than \$6 billion. While the need to eliminate temporary smells and create a pleasant ambiance drive demand, competition from other industries, disengagement with the category, and a lack of major innovation are ...

Attitudes towards Cosmetic Procedures - UK

“Brits are generally happy with their appearance, presenting a crucial challenge for an industry that is centred on helping people to change how they look. However, there is scope for operators in the cosmetic procedures market to appeal to a wider audience by moving away from the current association with ...

Babies' and Children's Personal Care Products, Nappies and Wipes - UK

“Market decline continues to show the need for brands to differentiate versus own-label. This is easier in some sectors where parents seek specific claims, but mass disposable nappy brands will either need to premiumise further or devolve and compete on price. The overarching need for convenience in all sectors remains ...

Beach Holidays - UK

“Holidaymakers are more likely to cut back on short city breaks in the low seasons, rather than forgo their longer summer beach break. This gives operators the chance to diversify their beach products, offering more options to customise beyond the traditional 'fly and flop' break.”

– **Fergal McGivney, Senior ...**

Beauty Retailing - China

“Providing personalised designed products is perceived as an upcoming trend, and is especially an area needing most attention in bricks-and-mortar stores. This

“The Irish beauty and personal care market is largely driven by new product developments, technology-led innovations and the digital world of social media. With consumers looking for good value for money, mass-market brands dominate the market across many personal care and beauty segments. Nevertheless, BPC shoppers are prepared to pay ...

Bebidas Não-alcoólicas: Interação entre as Categorias - Brazil

“É natural que os consumidores estejam buscando produtos mais saudáveis, que sejam ao mesmo tempo funcionais. Mas é importante lembrar que existe espaço para inovar em bebidas não alcoólicas em outros aspectos também, como em sabores, embalagens e ingredientes, e de se explorar novos posicionamentos e ocasiões de consumo.” ...

Black Consumers and Alcoholic Beverages - US

Alcohol consumption is largely driven by emotional fulfilment. Black consumers’ motivation to drink can range from a desire to relax in solitude to getting the party started with their peers. Black consumers’ consumption of alcoholic beverages by type is similar to the general market. Beer and wine are the most ...

Car Review - UK

“After a period of growth the UK car market has begun to enter a period of stability. New sales are in decline while the used market has stagnated. Yet within the market change continues. Owners are increasingly looking for a more bespoke vehicle with a growing percentage also looking for ...

Children and Health - US

“Illness is prevalent among children, as 97% of children younger than 12 experienced some type of illness symptom in the past year. Their weaker immune system combined with opportunities for interaction and germ spreading makes them especially susceptible to illness. The OTC (over-the-counter) children’s health products market has continued to ...

Children's Social Care - UK

approach can help to win back lapsed offline buyers and differentiate from online offerings. Online channels should explore beyond price competition by incorporating new techniques such as AR ...

Beverage Blurring - Brazil

“Consumers want more healthful products that can be functional at the same time. It is important to remember, however, that there is space to innovate in the non-alcoholic drinks category in other aspects too, such as flavor, packaging and ingredients, and to explore new positions and consumption occasions.”

— ...

Bottled Water - US

The bottled water category continues steady growth contributed by all segments. As consumer concern over sugar and hydration grows, still and sparkling waters alike reap the benefits. Brands at both ends of the price spectrum are finding success: private label often winning via price, and premium bottled water appealing via ...

Car Sharing and Ride Sharing - US

“Car sharing and ride sharing are relatively new mobility solutions that are having a profound impact on how consumers get around. Advances in technology have allowed car sharing and ride sharing services to disrupt established industries ranging from the cab industry to auto sales. This Report will examine mobility behaviors ...

Children's Healthcare - UK

“The children’s OTC healthcare market has benefited somewhat in recent years from the baby boom of 2010-12, but value is now slipping into decline. Growing pressures on the NHS could help provide some respite, with parents looking to the category to fill the gap left by a limiting of its ...

Christmas Shopping Habits - UK

“As local authorities restrict their spending, a large number of services could be subject to further cuts - including those listed as ‘priority services’, such as children’s services and social care. This could occur even though the number of children in care has reached a record high.”

– Lewis Cone ...

Christmas Spending Habits - Ireland

“Irish consumers spent more during Christmas 2017 compared with Christmas 2016, showing strong gift purchasing and a high level of favouritism for branded goods when shopping for Christmas groceries.”

Consumers and Retail Credit - UK

“Consumer confidence and good credit availability has driven year-on-year growth in retail credit lending. Going forward, technology innovation will make the provision and application of online retail credit more streamlined, helping to attract new customers. Partnerships with fintech lending firms will also extend the availability of retail credit among retailers ...

Critical Illness Cover - UK

“Despite the constant tweaking of policy terms, devising more simplified and affordable propositions and introducing added-value benefits, providers still struggle to effectively tap into the strong latent demand that exists within the core target groups of families and mortgage holders. As such, it remains an underpenetrated market.”

– Sarah ...

Drug Store Retailing - US

“A combination of an aging population and favorable market factors is expected to result in positive growth for the drug store market. However, a number of issues, such as consumers’ low loyalty and desire for deals, combined with an increasingly competitive landscape will continue to pose challenges for traditional drug ...

“It was a remarkably good Christmas given that all the economic indicators suggested that consumers should be becoming more cautious and because the comparison was with a retail boom in the final quarter of 2016. In the event, people were prepared to borrow to cover the fact that real incomes ...

Consumers and Data Sharing in Financial Services - UK

“Open Banking has often been described as ‘bad news’ for the UK’s big banks. However, consumers are far more likely to share financial data from other providers with their main bank than they are to give rival banks access to their information. This could give banks an opportunity to improve ...

Crackers - US

“After a four year period of modest growth, sales of crackers fell slightly from 2016-17, thanks in part to intensified snacking competition. Benefitting from consumer interest in snacking and a reputation for being versatile, the crackers category enjoys nearly universal penetration, making growth difficult to come by. As a category ...

Desserts & Sweets Consumption Habits - Brazil

“Despite growing health concerns related to food and drinks consumption, indulgence and flavor are still the most important attributes for the desserts and sweets category. When consuming these products, Brazilians are eager to find a moment of pleasure that improves their mood and emotional well-being.”

– Ana Paula Gilsogamo ...

Electrical Goods Retailing - Europe

“This 2018 report paints a picture of online retailing growing strongly again. Amazon is by far the most used retailer in Europe. Yet we think that there will always be a demand for stores – for the display and for the helpful service. It’s time for more of ...

Electrical Goods Retailing - France

“The electricals market in France is robust, but the retail landscape has been changed dramatically by digitalisation. As Amazon has increased its dominance, the established players have fought back with a series of acquisitions and partnerships, with the purchase of Darty by Fnac the most high profile. The online ...

Electrical Goods Retailing - Italy

“Italy lags a long way behind the rest of Western Europe in retail development and especially in online development. Electricals retailing is still very fragmented across the board and online we estimate that even the leading player via that channel, Amazon, has a market share of under 2%. Change is ...

Electrical Goods Retailing - UK

“Spending on electricals held up well in 2017 despite increased pressure on consumers’ finances. However, it was again the non-specialists that were the driver, particularly those with a strong presence online as spending increasingly moves to online channels. Demand is equally being driven by high levels of promotional activity, which ...

Family Entertainment - Canada

Family entertainment activities need not be elaborate to be considered meaningful. The ‘life stage’ of families will impact the end-goals of parents: those with young children lean more towards activities that allow for mental, physical and social development. In contrast, those with older children prioritize activities that can contribute to ...

Fast Casual Restaurants - US

Even as things change, they still remain the same. The concept of quality food at an affordable price that launched the fast casual segment has remained a key association. However, as dining habits shift and the landscape gets more competitive, fast casuals look beyond what worked in the past and ...

Hábitos de Consumo de Doces e Sobremesas - Brazil

Electrical Goods Retailing - Germany

“Consumer spending on electrical goods continued to weaken in 2017 as higher inflation in other product categories led consumers to spend more elsewhere. Online is now the channel of choice for Germans shopping for electricals, with 70% of electrical goods shoppers buying via any device in the past year and ...

Electrical Goods Retailing - Spain

“While the economic climate in Spain has greatly improved and spending on electrical items has increased for the past four years, electrical specialists have been steadily losing market share, largely to the online channel and particularly to the likes of Amazon. Specialists must look not just to match Amazon in ...

European Retail Briefing - Europe

This month's European Retail Briefing includes:

Family Vacations - US

“For parents with kids under 18 in the household, family vacations offer an opportunity for quality time, relaxation, and even some adventure. Visiting family and friends is the most popular type of trip, indicating that the destination may already be dictated for family vacations. Even so, travel brands can win ...

Full Service Restaurants - US

“FSRs (full service restaurants) continue to experience sales growth and set the trends that influence the entire restaurant industry as well as retail food. However, while the market as a whole is growing, many individual FSRs, especially mainstream casual dining chains, are facing sales losses. Market saturation and changes in ...

Hábitos de Consumo de Snacks - Brazil

“Apesar da crescente preocupação com a saúde, é preciso ter em mente que a indulgência e o sabor ainda são os atributos mais importantes para a categoria. Ao consumir doces e sobremesas, os brasileiros estão principalmente em busca de momentos prazerosos, que melhorem seu humor e seu bem-estar emocional”.

– ...

Hispanics and Alcoholic Beverages - US

"Hispanics' expenditures on alcoholic beverages have experienced significant growth over the past five years. However, Hispanics' share of expenditures under indexes considerably relative to their share of the population. Hispanics tend to gravitate mainly toward beer, and they under index for drinking spirits and wine. However, access to better opportunities ...

Hobbies and Interests - UK

"UK consumers' favourite hobbies are those which involve minimal outlay such as reading, listening to music and baking/cooking. As consumers are choosing to save, more costly activities may be deemed less affordable. The influence that online content is having on consumers, especially Millennials, cannot be ignored. These online influencers ...

Hotels in Australia and New Zealand - Australasia

"So far, most of the major international chains, led by AccorHotels, have established at least a toehold in the Australian market, as well as in New Zealand, but to a lesser extent. Accor has further solidified its leading position with its bid to acquire Mantra Group. Prince Hotels, a leading ...

Kids as Influencers - US

"Typically, parents with children under the age of 18 are in their prime earning and spending years, making them a critical audience for brands to win – and kids have an undeniable impact on parents' spending decisions. As seen in Mintel's analysis, the nature of this impact does however vary ...

“A questão da saudabilidade vem sendo uma exigência cada vez maior dos consumidores, que demandam opções saudáveis tanto durante quanto entre as refeições. Porém, devido à competitividade acirrada entre as diversas categorias de snacks, além de produtos que tragam benefícios para a saúde, torna-se imprescindível o desenvolvimento de opções que ...

Hispanics' Content Consumption and Sharing - US

"As the digital divide between Hispanics and the general population closes, the Hispanic population is consuming a vast array of content on a multitude of platforms. TV is still the center of Hispanic households, but online services are successfully complementing traditional media channels by filling in education and entertainment gaps ...

Holidays to France - UK

"France needs to promote two contrasting messages to UK visitors; the first is being a slow and sensuous destination which offers a tranquil escape from the modern, over-busy, 'always connected' world, the second highlighting a vibrant, quirky, dynamic and contemporary country."

– John Worthington, Senior Analyst

Household Cleaning Equipment - UK

"The continued development of more functional kitchen rolls is a threat to household essentials like cloths and sponges. Adding extra benefits, such as antibacterial properties or the ability to use without chemical detergents, as well as replicating the convenience of kitchen rolls, is likely to be key to the success ...

Major Household Appliances - US

"The multibillion-dollar major household appliance market reached \$38.2 billion in 2017, and is forecast to keep growing at a steady pace through 2022. While current growth has mainly stemmed from an overall positive economy and housing market, as well as continued category innovation, future growth could be stimulated by ...

Managing Skin Conditions - China

“Minor skin conditions seem to be no big deal for Chinese consumers. The majority of them don’t bother to use specialised products or take medicines to treat their skin conditions. In order to broaden consumer base and usage frequencies, cosmeceuticals need to promote more preventative usage by positioning as a ...

Menu Trends - UK

“Although older diners enjoy common cooking methods like roasting, steaming and stir frying, affluent 16-44-year-olds are driving the shift towards emerging food trends including smoking, curing, raw food, fermenting and pickling. Pizza brands are leveraging consumer demand for wood-fired oven cooking; however air pollution concerns may result in the banning ...

Nursery and Baby Equipment Retailing - UK

“The nursery and baby equipment market has benefited from many successful years of growth, but the sector is now entering more challenging times. It is more important than ever, in such a highly fragmented market, for retailers and brands to stand out by continuing to innovate and have a strong ...

Outbound Travel - China

“As the majority of consumers now undertake outbound travel, future growth will be driven by increasing visit frequency. Beyond the common selling points such as natural scenery and cultural attractions, local food could be next thing used to grab consumers’ stomach’.”

Pharmacy Retailing - Brazil

“Brazilian pharmacies face fierce competition. With so many drugstores trying to attract consumers, they will need to adapt to the modern era, offering mobile apps that facilitate the purchasing process and improve the communication with pharmacists, for example. In

Men's and Women's Underwear and Sleepwear - US

The underwear market is in a state of change. Tried and true brands are still dominating, but newer start-ups and other online-only players are offering fresh alternatives and making inroads, especially among younger buyers. Men’s increased engagement in the category is fueling the men’s sector, while female-targeted brands are shifting ...

National Newspapers - UK

“Changes to Facebook’s News Feed present both problems and opportunities for newspaper publishers. It highlights the need to diversify across platforms to not become reliant on any particularly source for traffic. Some newspapers, however, could gain more prominence on the social network as Facebook takes a more active role in ...

Optical Goods Retailing - UK

“Consumer spending on optical goods and services in the UK has continued to rise. However, growth in the market continued to be hindered by low inflation in core categories as a number of the leading players rely on competitive pricing strategies to attract customers. As a result, the independents are ...

Pasta, Rice and Noodles - UK

“Convenience and value for money remain key strengths for the category and should support the market if inflation remains high and consumer incomes are squeezed. Meanwhile, encouraging new dish and cuisine pairings for pasta, rice and noodles remains key to establish new usage occasions and drive volume growth.”

— ...

Plant Protein Drinks - China

“The plant protein drinks industry needs to reinforce its image as a tasty drink with nutritional benefits to compete with other beverages including dairy drinks. In addition, launching more flavoured variants and introducing new ingredients such as cashew could help to boost appeal and increase consumption.”

addition, pharmacies that offer in-store health services, 'click & collect' options ...

Potato and Tortilla Chips - US

Potato and tortilla chips have generated solid growth in recent years, driven by the increasing prevalence of snacking, a steady stream of new flavors, and the category's status as a permissible indulgence. Bold and creative new flavors and forms will continue to drive sales in coming years, along with a ...

Retail Banking and Credit Unions - US

"While the amount of total deposits held at US banks and credit unions continues to grow, the number of companies controlling the industry has steadily shrunk. Nonetheless, consumer satisfaction and demand for a physical presence remains high. While consumers—especially younger generations—are eager to utilize the latest technological advancements, trust and ...

Soap, Bath and Shower Products - US

"The soap, bath, and shower products market continues to experience slow, yet steady growth, benefiting from strong liquid body wash sales that are compensating for struggles in the bar soap segment. The inclusion of premium and therapeutic benefits has also helped boost sales of liquid body wash and bath products ...

South America Outbound - South America

"Economic growth and stability plays a critical role in the development of South America's outbound travel market. Brazil and Argentina may be the main engines of foreign travel, accounting for over half of all South American foreign departures, but smaller economies, such as Bolivia and Paraguay, are witnessing more dynamic ...

SUVs - China

"近期内，SUV的市场成功将持续下去。受到换购车主消费升级趋势的影响，中大型/全尺寸SUV增势迅猛。但

– Yihe Huang ...

Recycling - UK

"The value of the UK recycling market rose again over 2017, though margins narrowed in line with increasingly difficult market conditions. These conditions are set to be exacerbated in the coming years given the recent Chinese ban on imported plastic waste, government budget constraints, and the finalisation of Brexit negotiations ...

Snacking Consumption Habits - Brazil

"Health issues are a great influencer among consumers, who demand more healthful options both during and between meals. However, due to the fierce competition between different snacks categories, in addition to products that offer health benefits, it is essential to develop innovative products in terms of composition, flavor, convenience, and ...

Software - UK

"Total sales of software have been subject to fundamental changes as the previous acquisition/license purchase model has increasingly moved towards software as a service. At the same time, customisation of packaged software is becoming increasingly easy and flexible, assisting a trend to packaged products, which tend to be lower ...

SUVs - China

"SUVs are going to continue the current success in the foreseeable future. Mid-to-full-size models have an expanding momentum, aligning with the trading up trend of replacement car buyers. Yet, coupe-styled cross-type compact models are worth paying more attention to, given their popularity among post 90s car buyers, especially MinTs. The ...

The Beauty Consumer - US

The beauty category has continued to grow through 2017, with the highest growth coming from beauty

是，轿跑车风格的跨界紧凑型汽车也值得关注，因为受到90后消费群的青睐，尤其是英敏特城市精英人群。品牌如果在汽车内部空间设计（包括座椅布局和功能等）上匠心独运，或可赢得消费者的芳心。”

— 过人，研究副总监

The Branch Banking Experience - Canada

“A significant number of banking customers are friendly with branch staff, making it easier to cement stronger client relationships over the long term.”

— **Sanjay Sharma, Senior Financial Services Analyst**

Travel and Tourism - France

“As the world’s most popular tourist destination, France is endowed with an extraordinary wealth of tourist attractions and glorious scenery, coupled with outstanding gastronomy and impeccable wine credentials that are renowned all over the world. Following the devastating terrorist attacks that had a direct effect on the tourist industry, all ...

Travel and Tourism - Italy

“Italy is one of the world’s most popular tourism destinations and its tourism product is truly exceptional ranging from art, architecture and culture, to stunning landscapes and coastlines along with its iconic fashion industry. The sector has fared well in times of economic difficulties and international arrivals have continued to ...

Travel and Tourism - Spain

“Celebrating both another year of record international arrivals and the success of San Sebastián’s year as a European Capital of Culture, the Spanish tourism industry entered 2017 on a high. The latter part of the year, however, was very challenging for Spain and its tourism sector. Despite the Barcelona terror ...

UK Retail Briefing - UK

This month's UK Retail briefing includes:

devices. Women are minimizing their daily beauty routines and are searching for products that can do it all in the least amount of time. Going forward, women will continue to demand customized products to ...

Travel and Tourism - Austria

“Austria can boast of one of the most prolific tourism sectors in Europe and the world with over 42 million arrivals and 140 million nights spent in the November 2016 to October 2017 period. Despite the success, a more holistic approach to higher- and lower-grossing tourist destinations, better infrastructure and ...

Travel and Tourism - Germany

“Perceived as a safe pair of hands, with untapped tourism potential, and good value for money, Europe’s unofficial leader Germany is on the rise. A sought-after luxury tourism destination, and in pole position with an increased demand for city breaks, it is also a top flight business destination, heading up ...

Travel and Tourism - Portugal

“The concerted efforts of those with vested interests in Portugal’s tourism industry to improve the competitiveness of Portugal’s tourism industry have reaped rewards. The WEF [World Economic Forum]’s Travel & Tourism Competitiveness Report 2017 ranks Portugal as the 14th most competitive destination (out of 136) on the globe . . . Diversification ...

Travel Insurance - UK

“The travel insurance industry is driven by intense price competition, as many consumers draw on price comparison websites in order to find the best deal. At the same time, travel insurers are facing increased cost pressures, making it difficult to keep premiums down and maintain comprehensive levels of cover. Insurers ...

US Travel - Canada

“Most Canadians have taken a leisure trip to the US in the past two years with shopping trips being the most common focus for these journeys. Canadians deterred

from travelling to the US due to the stronger US Dollar and perhaps the political climate create hurdles that need to be ...

Varejo de Farmácias - Brazil

“As farmácias brasileiras enfrentam concorrência acirrada, com muitas lojas disputando espaço entre os consumidores. Elas precisarão se adaptar à era moderna, com aplicativos que facilitem a vida dos brasileiros durante a compra e que possam até mesmo aproximá-los dos farmacêuticos, melhorando a comunicação entre eles. Sendo assim, farmácias que ...

Vodka and Gin - Ireland

“Irish consumers are most likely to drink vodka and gin at a pub or bar or whilst they are on holiday. Moreover, as visiting a pub or bar is one of the most popular activities Irish consumers take part in when taking a trip, and with the number of domestic ...

World Cuisines - UK

“Improved ranges, particularly in own-label and in emerging cuisines, are providing a boost to sales. With interest in emerging world cuisines still significantly higher than current at-home eating though, a big opportunity exists for further sales growth through building familiarity with less widely eaten dishes. This includes using promotions and ...

出境旅游 - China

" 大多数消费者会出境游，市场未来增长动力来自旅游频次的增加。除自然景观和文化景点等常见卖点外，当地美食小吃可成为下一个亮点，一举‘抓住消费者的胃’。 "

— 黄一鹤，研究分析师

植物蛋白饮料 - China

" 为与乳制品及其它饮料竞争，植物蛋白饮料需更展现其为具营养功效的美味饮品。此外，厂商可以通过推出更多不同风味的产品，或将新成分如腰果等带进市场来吸引消费者的兴趣并增加饮用量。 "

— 黄一鹤，研究分析师

皮肤管理 - China

" 轻微的皮肤状况对中国消费者而言似乎无关紧要。大多数人不会采用专门的产品或药品来处理皮肤问题。为扩大消费者基数及使用频率，药妆产品可以定位为维持肌肤健康的全面性产品，又或是针对不良生活方式（如高压生活、睡眠不足等）等造成肌肤问题的主因。 "

美容零售 - China

“提供定制款产品被视为大势所趋，尤其值得实体店留意。此举可以帮助实体店赢回流失的客户，打造不同于线上渠道的差异优势。除了价格战外，在线渠道还应该利用AR（增强现实）试妆等新科技带来更便捷的购物流程。”

— 金乔颖，研究副总监

零食消费趋势 - China

“尽管当今消费者的健康意识明显不断增强，但仍有高达80%的被访者表示吃零食带来的并不是负罪感，而会让心情更愉悦。这说明零食创新不必局限于推出更健康的产品。消费者对真正的纵享体验有切实需求。英敏特调查显示，零食在帮助消费者享受欢乐时光、摆脱生活压力方面的作用日益突出。”

— 徐如一（中国区研究部总监）