

August 2018

Airlines - UK

"Airlines face some challenging times over the next few years as Brexit approaches and fuel costs rise. While businesses are cutting back on travel, consumers are still hungry for holidays. However, they will be keeping an eye on spending as the Pound remains weak. Airlines that help consumers manage their ...

America's Pet Owners - US

"Pet ownership in the US continues to climb, propelling the market forward. The market reached an estimated \$86.7 billion in 2018 (up 6% over the prior year), with growth experienced among all segments (pet food, pet supplies, veterinary services, pet services)."

Attitudes to Advertising - Ireland

"There remains a high level of advertising avoidance as Irish consumers continue to fast forward through TV adverts when using catch-up and on-demand services, and change channels and browser tabs when adverts start. However, as consumers show a strong preference for advertising that informs them of special offers and makes ...

Attitudes towards KOLs - China

"The new era of internet offers both 'listeners' and 'speakers' more methods of communication. By the accessibility and instance of social media, the number of KOLs, especially internet celebrities, has shown a geometric growth. It is a brand new touchpoint to reach consumers with humanized features and understanding consumers' attitudes ...

Auto Financing - Canada

"Dealerships have a clear point-of-sale advantage in the financing process and satisfaction levels are high, solidifying their place as a convenient one-stop shopping experience."

Airlines in the US - US

"Rising costs are causing US airlines to raise fares, even including the ULCCs [ultra-low-cost carriers] but margins are under pressure. The US aviation sector has encountered minimal competition from high-speed rail so far, but this is set to change in the medium term. The trend towards consolidation of the sector ...

Annuities and Income Drawdown - UK

"Although the decline in annuity sales appears to have subsided, market momentum remains in favour of drawdown. DC pension savers highly value control and flexibility, and with annuity rates still historically low, many entering retirement will continue to avoid buying one until there is more incentive to do so."

- George ...

Attitudes towards Craft Alcoholic Drinks - UK

"Where craft brands enjoy a decided advantage over standard ones is the positive emotions they spark among users. Underpinning this is a perception of craft brands as supporting their local economy. Marketing messages presenting their company as part of a wider community would help craft producers to leverage this perception ...

Attitudes towards Video and TV - UK

"Competition within the video subscription streaming market is set to increase considerably over the coming years as major new players, from Apple to YouTube, introduce new services. Many of these services look as if they will be combining TV content with other media formats, including music, which could help boost ...

B2B E-Commerce - UK

"Statistics demonstrate that the larger the company, the more likely it is to use e-commerce as a route to market. Yet cloud computing and software-as-a-service are making important facilities increasingly cost-effective for SMEs. Companies of all sizes remain three times

more likely to use e-commerce as a purchasing route than ...

Bathroom and Bathroom Accessories - UK

"The rise of online sellers in the bathroom market has been rapid, with several companies reaching a substantial size. Their emphasis on price is a key factor in drawing customers away from retailers with shops, but there is more to it than this. Consumer expectations of shopping are changing and ...

Beauty Influencers and Educators - UK

"Traditional experts such as in-store counter staff, make-up artists and dermatologists are the most trusted sources of information in BPC, suggesting that brands can do more to reassert the position of traditional experts. Social media influencers remain important, particularly to young women, however BPC shoppers are showing scepticism towards them ...

Better for You Eating Trends - US

"Most consumers report that they try to maintain a healthy diet at least some of the time, making better-for-you food and beverage claims potentially motivating to a wide audience. Still, while what's healthy or better-for-you can mean different things to different consumers, there are overarching opportunities to highlight freshness, simplicity ...

Black Consumers and Cleaning the House - US

"A clean house is a healthy house, and many Black consumers take pride in regularly cleaning their home to maintain order and create a relaxing environment away from the outside world. Product and brand considerations, budget constraints, and routines impact Black consumers' desire and approach to cleaning the house."

- Toya ...

Bodycare and Deodorant - US

"The body care and deodorant industry continues to see slow yet steady sales growth in 2018, with future trends projected to remain comparable. Deodorant brands that focus on scent, natural ingredients, and practical claims such as staining or white marks will continue to see success. Body care brands that pique ...

Breakfast Cereals - UK

"Lack of excitement and busy lifestyles are barriers to people not eating breakfast cereals more often. More on-the-go formats should help cereals to stay on the menu among people who don't have time to eat breakfast at home, while separate toppings are one way of adding more excitement to the ...

Car Finance - China

"Chinese consumers' car financing methods are still conservative, especially consumers in tier two cities. Bank is the main car finance method for consumers. The top three methods that surveyed respondents chose are household savings, car-specific loans from banks and personal savings (48%, 46% and 46% respectively). On the other hand ...

Cause Marketing - US

"As Americans express frustration in government institutions' ability to take action quickly, citizens are increasingly turning to charitable organizations to facilitate aid for those in need. This creates an environment in which corporations can use their cause marketing initiatives to build affinity with a consumer base that has a predilection ...

Cloud Computing - UK

"Digital technologies are disrupting entire industries and customer expectations, and cloud computing has

Consumer Attitudes towards Challenger Brands - UK

become a key ingredient in enabling companies to cope with this change. Market growth is dynamic, offering constant cost-effective and scalable access to the latest technology for clients and recurring revenues for suppliers. The battle for worldwide ...

“Financial incentives and competitive prices will incentivise people to choose a challenger over an established provider, and give them a clear financial benefit to doing so. However, consumers need help to filter through the growing number of providers to find those that are most relevant to them.”

– Jessica ...

Consumers and the Economic Outlook - Quarterly Update - UK

“Consumers continue to worry about the impact Brexit will have on the UK economy. But people are still focussing much more on their own financial situations, which are currently in a pretty healthy state. The base rate rise will make it harder for some, but the general outlook is positive ...

Content Consumption: TV and Movies - Canada

“With the growing importance of the internet in regards to content consumption, the landscape for TV shows and movies has shifted. Traditional ways of accessing content, such as cable/satellite subscriptions and movie theatres, are now threatened by the low-priced convenience that is offered by online, in-home competitors. The result ...

Credit Cards - UK

“The credit card market is going through an interesting phase. On the one hand, providers are withdrawing their most generous deals, as they seek to offset extra costs linked to new regulation. On the other hand, they are pumping investment into new payment innovation, as they face growing competition from ...

Delivery and Returns: Understanding Consumer Needs - US

“Expectations around delivery and returns of online orders are changing. Retailers and shippers are investing resources into perfecting the last mile of the online shopping experience by expanding delivery options, decreasing delivery times, and removing some of the pain points from the returns process.”

Digital Advertising - Canada

“The vast majority of Canadian consumers regularly view digital ads, whether via a computer, mobile device and/or news feed. Additionally, most consumers are also exposed to digital ads on a daily basis. Although most see digital ads frequently, frustration and avoidance of such ads is prominent among Canadians, especially ...

Digital Advertising - US

“Sales of desktop and mobile banner and video ads have grown dramatically over the years, rising from \$10.7 billion in 2013 to \$39.3 billion in 2017. However, 2018 is the last year in which sales growth is expected to remain around or exceed 20%. This is likely because ...

Eating Out: The Decision Making Process - UK

“Visits to foodservice venues are driven mostly by discounts, which puts pressure on operators to maintain trading levels. While promotional activities remain prevalent, there is potential for these to be specifically targeted at celebratory occasions. Meanwhile, chain operators can’t rely solely on the convenience of their high street locations. Instead ...

Energy Industry - UK

“As competition in the energy retail market continues to heat up, suppliers are branching out into other utility services, such as broadband and mobile phone contracts, and bundling their multi-utility offering to gain a competitive edge. This trend is set to continue, with more suppliers offering diversified services to broaden ...

European Retail Briefing - Europe

This month's European Retail Briefing includes:

Fragrances - UK

"Women's body sprays have triggered the most recent market growth. A new wave of feminism has challenged traditional marketing, and unisex fragrances are a growing trend. A need for natural ingredients has given niche brands the lead, while large manufacturers get left behind. Body spray could be key for luxury ...

Furniture Retailing - US

"The furniture category has grown consistently over past few years, which is expected to continue over the next five years, thanks to a stable housing market and increasing types of living situations, which creates more housing needs. Still, replacement dominates purchases, and consumers need new reasons and options to encourage ...

Grocery Retailing - Canada

"Virtually all Canadians (96%) hold some level of responsibility for grocery shopping. Canadians continue to lean towards traditional supermarkets for items associated with freshness, however, the expansion of supercentres combined with the convenience of one-stop shopping plus the promise of low prices is leading younger consumers to become less loyal ...

Hispanics and Cleaning the House - US

"At not quite \$2 billion, Hispanics' expenditures on household cleaning products have contracted slightly since 2013. Hispanic women continue to take the lead, while Hispanic men play a supporting role. Cleaning the house can be hard work, but there are clear attitudinal

Food Delivery Services - China

"China's food delivery market has enjoyed explosive growth in recent years due to consumers' increasing value on convenience. However, there is still great potential as consumers start to see food delivery as a treat rather than a tool to meet the basic need of satisfying hunger. Regarding usage habits, consumers ...

Frozen and Chilled Ready Meals - China

"Although the market prospects of ready meals have been questioned in recent years, especially given the competitive pressure from food delivery services and New Retail, Mintel believes the category still has strong potential. Indeed some leading players' efforts with new product innovation are already paying off.

What players need to ...

Gambling and Sports Betting - US

"Although they have been growing steadily, the gambling and sports betting markets have the potential to bust out in the coming years. Sports betting markets are expected to open up significantly on the heels of a monumental Supreme Court decision allowing states to regulate this market. Still, overcoming lingering skepticism ...

Hábitos de Limpeza da Casa - Brazil

"Sustentabilidade é a palavra da vez para o setor de limpeza. Diversas marcas vêm buscando uma abordagem ecológica, seja através de formulações mais naturais, com menos ingredientes químicos, ou apostando em embalagens recicláveis, reutilizáveis e biodegradáveis. Mas as mudanças no comportamento do consumidor abrem oportunidades também para inovações em termo ...

Home Laundry Products - US

"The home laundry products market is estimated to grow. While detergent dominates the market, the wide array of features and innovations offered in the laundry care segment largely contributed to category growth. Offering products that effectively, yet safely, clean all fabric types could be an opportunity for brands to post ...

differences between Hispanics who clean because they want ...

Hot Drinks - Ireland

“Between declining consumers prices and increased out-of-home drinking, the hot drinks market in RoI has seen its value decline, while in NI increased consumer prices have seen value sales increase slightly. Moving forward a key challenge for hot drink brands will be creating the ‘barista’ experience at home.”

– ...

Household Cleaning Habits - Brazil

“Sustainability is the keyword for the household cleaning products market. Many brands have adopted an eco-friendly approach, either through natural ingredients, chemical-free formulations, or recyclable, reusable, and biodegradable packaging. Changes in consumer behavior, however, also open opportunities for innovations in terms of fragrance, format, and positioning.”

– Marina Ferreira ...

Leisure Time - China

“Consumers nowadays pay attention to personal feelings and try to strike a work-life balance. They place emphasis on sensory and immersive experiences and explore multiple meanings through leisure products and services. Brands should provide opportunities for consumers to express their personalities even publicise their beliefs within brand contexts. What can ...

Lifestyles of Rural Americans - US

“In some ways the internet has brought urban, suburban, and rural residents closer together, giving Americans across the country access to the same hub of information. Even so, differences remain between these groups. Rural Americans have a different demographic make-up, less access to retail and entertainment, and different habits and ...

Music Concerts and Festivals - UK

Household Appliances - China

“The household appliance market is moderately growing in China, reflecting a steady economic status and a growing housing market. The healthy financial condition allows consumers to build a more relaxed and cosy environment at home, hence improving the quality of life works as the top trigger and motivates them to ...

Indonesia Outbound - Indonesia

“Indonesia’s rapid economic progress has brought forth a dynamic shift in attitudes towards travel. The country’s expanding middle classes demonstrate a strong desire to travel abroad, eager to spend their discretionary income on experiences, not just consumer goods. The ease of researching and planning travel through smartphones is making travel ...

Lifestyles of Generation Z - UK

“As Generation Z’s friendships have increasingly shifted online it has made it harder for them to switch off from technology, resulting in a culture of “hyper-connectivity” that is arguably having a very real impact on their mental health. From a commercial perspective this underlines opportunities for more brands to engage ...

Luxury Goods Retail - International

“The global luxury goods industry is going through a significant period of change. As young consumers are fast becoming key purchasers of high-end fashion, luxury houses need to adapt. This has resulted in polarised performances amongst the leading players. Those that were slower to respond have lost market share, whilst ...

New Retail - China

“The UK music concert and festivals market continues to grow in value, fuelled by more events, higher ticket prices and a rise in the number of music tourists from overseas. The industry can’t rely on international visitors to keep the market afloat. If music fans begin to cut-back or Brexit ...

Nuts, Seeds and Trail Mix - US

"Nuts, seeds, and trail mix benefit from a relatively healthy, not to mention natural, reputation. Brands leveraging such a reputation should be well-positioned to capitalize on increasing consumer interest in snacking and on healthier snack options, in particular. The challenge for the category will be in offering options that not ...

Online Grocery Shopping - US

"Despite doubling from 2013-18, online grocery sales in the US remain a small proportion of total grocery sales and an even smaller proportion of total eCommerce. Unlike other major product categories, adoption of online shopping in this sector has been slow, namely due to consumers’ strong preference to shop in-store ...

Paying for Digital Content - China

“Digital content providers could expect stable and continuous spending from consumers, since they are used to enjoying online media and paying for valuable contents. The knowledge content market still has much growth potential supported by consumers’ positive impressions of it. Developing knowledge contents in interest and career themes will pay ...

Pet Food & Pet Care Retailing - UK

“The pet food and pet care industry is growing well, underpinned by stable pet ownership and an increasing desire to treat pets with premium food, products and services as pets become a more integral part of the family. With the rise of services there is an opportunity for both specialist ...

Pet Insurance - UK

“New Retail is fast becoming the driving force behind the development of China’s consumer market, drawing together all aspects of people’s consuming lifestyles, and fundamentally changing the relationship between retailers, brands and consumers. Shopping is fast integrating with all areas of consumer activity, and with most consumer service aspects, combining ...

Occasionwear (Including Partywear & Bridalwear) - UK

“Although the occasionwear market continues to be highly seasonal, with significant peaks in the summer and winter months, consumers show a willingness to buy new fashion for a variety of different occasions which is helping to buoy demand throughout the year. As retailers look to capitalise on the strength of ...

Pães e Produtos Assados - Brazil

“A categoria atualmente possui dois principais desafios: a preocupação com a saudabilidade e alta dos preços que vem dificultando seu crescimento em volume. Diante desse cenário uma boa estratégia pode ser o investimento em opções saudáveis de maior valor agregado, como integrais, sem glúten e produtos à base de farinhas ...

Perceptions of Credit and Credit Monitoring - US

"The arena of credit scoring and credit monitoring is one rife with contradictions. Consumers overwhelmingly recognize the importance of building and maintaining good credit, and while most make a regular habit of checking their scores, many US consumers admit they never do. Credit reporting errors occur frequently, but consumers are ...

Pet Food - UK

“The desire to pamper pets has underpinned the continuous value sales growth in the market, with NPD often reflecting trends in the human food market. This bodes well for emerging pet food types such as high protein and plant-based. However, proving their worth, particularly in terms of their health credentials ...

Premium Food and Drink - What Will Consumers Pay More For? - Ireland

"The pet insurance market is enjoying another positive year, with growth projected to continue in the medium term. Pet owners are keen to ensure they have enough cover to take care of their animals, while the rising cost of vet bills makes insurance increasingly attractive. Innovative insurers have an opportunity ...

Public Expenditure - UK

"The UK government's strategy remains focused on reducing the national deficit, with a desire to maintain public expenditure while reducing borrowing and boosting economic growth. The government further reduced borrowing in 2018, with this trend set to continue in the coming years, assuming no political change. However, the UK is ...

Sandwiches, Subs and Wraps - US

"The sandwich, sub, and wrap market has continued to engage consumers with premium, innovative, and tasty fare. Many fast casual sandwich stores and fast food chains are expanding units and growing sales. However, the category is crowded, with grocery stores, convenience stores, and coffee shops creating a complex, competitive landscape ...

SUVs and Crossovers - US

"SUVs and crossovers are some of the most popular vehicle styles on the market currently, and competition is fierce with a plethora of models from nearly every brand. SUVs and crossovers range in many ways, seating, cargo space, towing capacity, and cost are just some of the choices shoppers have ...

Travel and Tourism - Bahamas

"The tourism industry in the Bahamas is showing every sign of going from strength to strength. The robust arrivals figures for 2018, which indicated such a dramatic increase over 2017, are certainly pointing in that direction. There are challenges however."

– **Jessica Kelly, Senior Tourism Analyst**

Travel and Tourism - Guatemala

"When purchasing food and drink, Irish consumers opt mainly for standard branded products across most categories such as snacks, alcohol and soft drinks, yet are drawn to own-label milk, baked sweet goods and prepared foods.

Residential Care for the Elderly - UK

"Alongside restrictive operating margins, care homes face an ongoing challenge to recruit and retain staff, with many operators reporting that they are increasingly competing with other low-pay sectors, such as supermarkets, who are actively recruiting and offering attractive pay rates."

– **Lewis Cone, B2B Analyst**

Sports Betting - UK

"The 2018 FIFA World Cup will have accelerated growth in sports betting market value but is likely to have been less successful in growing the player pool or promoting new technologies."

– **David Walmsley, Senior Leisure Analyst**

Thermal Insulation - UK

"UK demand for thermal insulation has demonstrated an erratic development over recent years. This has been exacerbated by changes to government programmes promoting home energy efficiency measures, which has resulted in stop-start activity in the retro-fit building insulation market. The recovery in UK construction activity has, however, provided more stable ...

Travel and Tourism - Barbados

"Barbados is one of the most developed and reputable tourism markets in the Caribbean. Just over 663,500 arrivals were reported in 2017, increasing 5% year on year. As a mature tourism market, Barbados faces tough competition from its Caribbean neighbours and it can be challenging to sustain growth rates ...

Travel and Tourism - Nicaragua

“A ravishing, intriguing and unforgettable Central America country, Guatemala, the ‘heart of the Mayan World’, is taking steps to address challenges to the development of its huge, largely untapped, tourism potential.”

– Jessica Kelly, Senior Tourism Analyst

Travel and Tourism - Panama

“While the Panamanian government appears committed to helping the country fulfil its tourism potential, significant challenges remain. These include creating a destination brand that captures the spirit of Panama and emphasises what is unique about the country, alongside a more joined-up approach to tourism promotion.”

– Jessica Kelly, Senior ...

UK Retail Briefing - UK

This month's UK Retail briefing includes:

Women's Beauty and Grooming Routines - China

“Chinese women are increasingly willing to invest in facial skincare, leading them to switch to higher-priced brands and adopt more steps into their routines, especially previously niche categories. The next steps could be expanding more segmented skincare products depending on the season, skin conditions, or used in the daytime and ...

付费数字内容 - China

“消费者稳定持续地为数字内容付费可期，因为他们习惯享受线上媒体并为有价值的内容付费。消费者对知识内容市场印象良好，让这一市场极具增长潜力。兴趣培养和职业主题的知识内容将会获得投资回报。”

女性美容护理流程 - China

“Billed as ‘quite possibly the Central American country that has it all: tropical rainforests and untouched beaches, fringed with palms, distant cloud-capped volcanoes, and recently some extraordinarily special eco-lodges’ by travel magazine giant Conde Nast Traveller, Nicaragua is an aspirational country for global adventure tourists who are keen to discover ...

Travel and Tourism - Trinidad and Tobago

“The ability to grow Trinidad and Tobago’s tourism industry in the future will always be hampered by two things – the country’s geographical location (ie far from the other Caribbean nations and off the beaten track for cruise companies) and the economy’s dependence on revenues and taxes from the energy ...

Video Games and Consoles - UK

“Volume sales of video games are consistently declining despite the rising popularity of gaming and increased frequency of play. This reflects the extent of competitive online play, with gamers seeking to improve their performance and focus on fewer titles. Consequently, revenue streams are shifting towards online subscriptions, in-game payments for ...

Yogurt - China

"Although consumers' consumption frequency is lower than last year, China's yogurt market will keep growing in both the ambient and chilled sectors. The active innovation in flavour and texture, and the introduction of new product formats will be the main impetus, driving the premiumisation trend. Local brands have started to ...

休闲生活 - China

“当今消费者关注个人感受，追求工作和生活的平衡。他们看重感官和沉浸式体验，探索休闲产品/服务的多重功能。品牌应为消费者提供展示个性的机会，甚至可以让他们通过品牌语境表达态度。可以在社交媒体分享、惊艳消费者朋友圈的特征都将成为产品/服务的加分项。”

– 赵鑫宇，初级研究分析师

家用电器 - China

“中国女性在面部护肤品上的投资意愿日益增强，这促使她们换用更高价的品牌，加入更多的护肤步骤，特别是之前的小众品类。下一步可以是基于季节、皮肤状况或日夜场合扩充更多的细分护肤品，从而刺激体验试用和多种类产品使用。”

— 李玉梅，高级研究分析师

对意见领袖的态度 - China

“互联网新时代赋予‘听众’和‘发言者’更多的沟通方式。社交媒体的可及性和快捷性孕育KOL数量，特别是网红数量，呈指

几何级增长。这是一种通过人性化功能吸引消费者的全新触点，了解消费者对他们的态度对于品牌发展至关重要。。”

汽车金融 - China

“中国消费者的汽车融资方式仍然保守，特别是二线城市消费者。银行服务是消费者支付车款的主要方式。被访者选择的前三大支付方式为家庭存款、银行专项车贷和个人存款（分别为48%、46%、46%）。另一方面，对于那些使用车贷的消费者，贷款利率和月还款额是影响车贷选择的重要因素。此外，二手车市场也能在很大程度上左右消费者的汽车融资选择。”

— 周同，研究分析师

酸奶 - China

“纵使今年中国消费者的酸奶使用频率比去年低，但是中国酸奶市场上的常温及冷藏两个品类的增长仍会持续。在风味和质地上的积极创新及新产品形式的引进都将成为主要动力，推动高端化趋势。区域品牌已经开始加入全国市场的竞争行列，这对市场的良性持续发展不失为一则好消息。”

— 李梦，研究副总监，食品与饮料

“中国家用电器市场平稳增长，反映了中国稳定的经济环境及增长的住房市场。消费者财务状况可观，从而有条件创造更轻松温馨的家居环境。提高生活质量是促使消费者使用更先进的家用电器的首要因素。例如，空气净化器和电烤箱在受访的城镇消费者中非常普及，渗透率接近50%。”

— 金乔颖，研究副总监

新零售 - China

“新零售快速成为中国消费者市场的驱动力，将人们消费生活的方方面面汇聚在一起，从根本上改变着零售商、品牌和消费者的关系。手机电子商务迅猛发展，中国零售市场发展历史较短——在这两方面的催化下，购物与消费活动的所有领域和大部分消费者服务领域快速融合。随着线上和线下零售融合，竞争格局出现转变，并购合作等也延伸至消费者服务领域。品牌不仅争取消费者的钱包份额，也在努力成为个体消费者日常生活的一部分。事实证明，中国消费者愿意在日常生活中接受并适应新的技术和创新；他们寻找能满足自己品味和需求的更多选择；追求更大的便利性以适应生活方式；希望服务更迅速、友好和个性化；享受社交性和娱乐性更强的购物体验。综上所述，中国市场的消费者体验可谓领先世界潮流。”

— 郭马修，亚太趋势研究主任

速冻和冷藏预加工食品 - China

“近年来，预加工食品市场面临来自餐饮外卖服务和新零售的压力，其市场前景备受质疑。尽管如此，英敏特认为该品类仍然大有市场潜力。一些领先品牌的产品创新努力也的确初显成效。

不过，品牌需下更大功夫扭转消费者的认知。消费者目前仍认为食用预加工食品只是为了快速充饥。但是，随着消费者日益追求美味可口，营养均衡的正宗美食，预加工食品未来可以发挥更大作用。英国和日本的预加工食品市场就做到了这一点——两大市场不断推进市场教育，让消费者认识到预加工食品也可以作为在家偶尔享用的美食。”

— 徐如一，北亚区报告总监

餐饮外卖服务 - China

“消费者越来越重视方便快捷，中国餐饮外卖市场近年来获得了爆炸式增长。消费者逐渐开始将餐饮外卖看作一种犒赏享受，而不仅仅是为了满足填饱肚子基本需求，所以该市场仍有发展潜力。领先平台尽管主导市场，但消费者往往在不同的外卖平台间切换。”

— 陈杨之，高级研究分析师