

August 2015

## Annuities - UK

"In retirement, people still want a predictable, guaranteed income more than anything else. Hybrid, or 'third way', products that provide this alongside more attractive rates and the ability to keep some pension funds invested to draw a more flexible income from seem well set for significant growth in the years ...

## Baby Boomers and Technology - UK

"Baby Boomers are a service-driven generation. While they are generally slightly less likely to own the latest technology products, manufacturers and retailers that offer face-to-face consultations and high quality customer service throughout the purchasing journey stand the best chance of reaching this group."

## Bakery Houses - China

"The bakery houses market is a dynamic market. From simple bread products expanding to a variety of innovative product offerings, one area of considerable interest to bakery stores is the introduction of café and fast casual dining formats to break through the traditional self-service format and capitalise lifestyle elements. Consider ...

## Black Consumers and Haircare - US

"Haircare is perhaps one of the largest areas of consumer expenditures among Black consumers. Hair is an important part of Black consumers' image – it shapes their identity and sends a signal to the world of who they are as a person. With the variety of ways that Black consumers ...

## Bridging Loans - UK

## Baby Boomers and Financial Services - UK

"While younger generations seem to generally be more trusting towards the financial services industry, Baby Boomers are more sceptical. Their views are tainted by witnessing some of the most notorious financial scandals of the last few decades, including the rise and fall of endowment mortgages and the mis-selling of pensions ...

## Baby Personal Care - China

"In order to add more values for baby personal care products, companies and brands could leverage successful examples from other baby care industries (eg infant formula milk) to promote new baby personal care products with advanced claims (eg contains human affinity ingredient) or functions (eg make babies stronger)."

– Yujing ...

## Bathrooms and Bathroom Accessories - UK

"The trend to want en-suite bathrooms is encouraging home owners to add extra bathrooms, sometimes by extending their homes. This is stimulating demand for showers as well as for bathroom fittings that work well in small spaces. People also want sleek, stylish bathrooms, inspired by what they see on television ...

## Bread and Baked Goods - Brazil

"The bread and baked goods market is still developing as consumers are eating more packaged bread although not necessarily eating less freshly baked bread from bakeries. Companies must invest in innovation, especially those regarding flavors and freshness."

Andre Euphrasio, Research Analyst

## Britain's Pet Owners - UK

“Although the bridging loans industry has traditionally been largely unregulated, stricter regulation in the wider lending market has led to many bridging lenders becoming wary of their operations, though they are still taking full advantage of opportunities presented.”

– **Lewis Cone, B2B Analyst**

## Burger and Chicken Concepts - US

As Americans continue to gravitate toward chicken and sandwich concepts, operators are answering their desire for premium and better-for-you products that are natural and highly customized. More restaurants are focusing on making a better burger and chicken sandwich through high quality meats, cheeses, and toppings. International flavors have also made ...

## Butter and Spreads - Ireland

“With growing attention on the dairy farmer protests both in Ireland and further afield, it will see consumers putting more emphasis on the fair treatment of farmers, and perhaps see butter buyers more likely to search out products that have been made locally and/or claim to ensure farmer welfare ...

## Coffee - UK

“Instant coffee, which still accounts almost three quarters of all value sales of UK coffee, has seen a sales fall as it loses drinkers. Meanwhile the pods segment continues to go from strength to strength.”

– **Douglas Faughnan, Senior Food and Drink Analyst**

## Consumers and the Economic Outlook: Quarterly Update - UK

“The generally positive outlook of the economic climate, and the benefits that are gradually being witnessed at the individual level, means that the people of Britain are finally regaining their confidence. For the first time since the economic downturn, Mintel’s data shows that more people feel better off compared to ...

## Current Accounts - Ireland

“The bond between a pet and their owner is starting to resemble very closely that between a parent and a child. Such shifting attitudes pave the way for new industries to develop and grow around pet doting and pampering, as pet parents seek to demonstrate how dedicated they are to ...

## Burger and Chicken Restaurants - UK

“A slower-growing core user base places an onus on fast food operators to work ever harder to engage with them. Using digital technology to a greater extent and making restaurants more inviting as a place to socialise should help them to do so.”

– **Richard Ford, Senior Food and ...**

## Certified Pre-owned Cars - US

The certified pre-owned car market is small but growing. Certified pre-owned (CPO) cars are used cars that have been certified by a manufacturer or dealership. Certification means that these vehicles are in very good or excellent condition and have passed an inspection by a trained technician, and it often means ...

## Colour Cosmetics - China

“High frequency of usage proves that once consumers adopt colour cosmetics products, many of them will develop a routine to wear them on a daily basis, meaning that opportunities for increasing frequency of usage amongst these users could be limited. Sales growth can be achieved by product extension, category extension ...

## Credit Cards - UK

“Credit card issuers who are considering scaling back their customer rewards in order to offset a reduction in interchange fee income should heed the warning of Mintel’s research. Around one in five credit and charge card holders would either use their card less or stop using it altogether if their ...

## Defining Ethnic Food - US

"The current account market in Ireland has weathered the economic recession and emerged relatively unscathed. Although the recession years were lost ones in terms of growth, the return to economic growth both in NI and RoI will almost certainly bring about a return to growth within the current account market ...

## Dentistry - UK

"The continued strain on NHS finances could lower confidence within the industry that the NHS will be able to offer appropriate remuneration to dental practices. Smaller practices will particularly suffer, especially as compliance costs are likely to rise. This could offer a further incentive for dentists to offer private or ...

## Eating Out Trends - Brazil

"The economic downturn has already started affecting Brazilian's eating out habits, but more than focusing on price alone, it is important that the foodservice sector is aware that low price does not necessarily guarantee consumers' loyalty. Many consumers consider eating out as a leisure activity, a way to get out ...

## European Retail Briefing - Europe

## Eyeglasses and Contact Lenses - US

"Strong sales of contact lenses, driven by more widespread use of daily contacts and higher consumer spend, have boosted the eyeglasses and contact lenses market. The market will likely experience further growth due to an aging population as well as product innovations that address a wider variety of vision concerns ...

## Fragrances - UK

Consumers are embracing a host of ethnic cuisines and, in the process, are expecting those dishes to deliver not only more flavor than mainstream foods but also specific attributes by cuisine. Mexican and Latin American dishes appear to be the domain of spicier flavor profiles, while Mediterranean and Thai offerings ...

## Desktop and Laptop PCs - UK

"While volumes are forecast to continue to decline, constant innovation and improved mobile concepts will help to revive the market and contain short-term decrease rates, particularly with the launch of Windows 10 in July 2015, which is anticipated to boost consumer demand."

## Energy and Sports Drinks - Canada

"The challenge for energy drink brands is altering negative perceptions of their authenticity, as well as their negative side effects. Naturally sourced ingredients in energy and sports drinks are important to consumers, as is providing validity to the benefits of these ingredients and documentation of their origins through multimedia channels ...

## Events Tourism - Ireland

"Past events in Ireland have proved beneficial for the events tourism market, with the 2015 Tall Ships held in Belfast – the largest event in NI in 2015 – attracting more than 500,000 visitors, benefiting local businesses as well as the events market. Looking ahead, the Irish events market ...

## Food Packaging Trends: Spotlight on Food Labeling - US

"While grocery shoppers continue to seek tasty, nutritious food, the impact of food labels appears to be waning. Differentiation exists across generation groups in terms of the type of information sought from labels. Inspiring purchase can come from boosting ingredient transparency, enhancing functional packaging elements that preserve freshness, and engaging ...

## Fragrances - US

"The category as a whole has shown incremental growth in value in the past, and, despite a decline predicted in 2015, is likely to show growth again in the future. Improved financial situations and savvy shopping behaviours are driving down the value of the mass fragrance and body sprays segments ...

## Fruit - US

"The fruit market has experienced fairly steady growth since 2010, and Mintel expects much of the same through 2020. Like the vegetables market, fruit's performance has been bolstered by fresh fruit, and hurt by shelf-stable segments. The frozen fruit segment may be small but it has maintained rapid growth and ...

## Holiday Shopping - Canada

"Holiday shopping represents the most lucrative time of year for retailers across all categories, much of it driven by Christmas. For the upcoming holidays, nine of 10 Canadians will be buying gifts."

## Homestays - International

"The attraction of homestays is multifaceted and includes price, cultural immersion and the ability to experience a destination as a local. Although the big Web-based distribution platforms like Airbnb have great growth potential, it is unlikely that they will take business away from the established operators in the more traditional ...

## In-salon Hair Services - UK

"Salons competing for loyalty, and a new generation of booking platforms have resulted in a strong discounting culture in the hair services market, with sales declines anticipated for 2015 as a result. Encouraging clients to trade up, or expand to new treatments and services is essential for returning the market ...

## Leisure Habits of Millennials - UK

"The impact of a saturated marketplace and increased competition from scented toiletries has led to flat performance in the \$3.7 billion fragrance category. To combat consumer apathy and confusion, industry players can leverage new product development and honed marketing emphasizing value-added benefits/ functionality, demographic-specific use, and customization. Delivering unique ...

## Hispanics and Healthcare - US

"Living a healthy life is top of mind for Hispanics; however, they feel that they are healthy, which reduces their motivation to proactively make significant changes in the way they live. While they see value in health insurance, financial constraints also limit the access that less-affluent Hispanics have to health ...

## Home Laundry Products - US

Sales of home laundry products continued a slow decline in 2015 as consumers took advantage of discounts and promotions and other ways to save money. Still, ample opportunities exist in the \$12.4 billion category for marketers and retailers that offer consumers ways to simplify the laundry process and improve ...

## Hot and Cold Cereal - US

The hot and cold cereals market continues to see sales declines similar to recent years, mostly driven by the cold cereal segment, with many consumers believing offerings are too processed and not convenient enough. The only growth occurring is in hot cereal, albeit from a small base. To grow the ...

## Laundry Detergents and Fabric Care - UK

"A focus on fragrance and more premium products has helped encourage shoppers to trade up and expand their product repertoires; in-wash scent boosters and antibacterial laundry cleaners in particular have created new product categories and helped return the market to growth. The next challenge for the sector is to encourage ...

## Leisure Time - US

Millennials have grown up in a digital world and one of their defining characteristics is their enthusiasm for technology and spending time online. However, they are also constantly on the lookout for new experiences, which can be as simple as trying a new type of food or going to a ...

## Luxury Goods Retailing - International

The concept of luxury goods is still highly subjective. It is usually obvious where a product is luxury and equally obvious where it isn't, but there is a grey area that is more subjective. Take the Swatch group, for example. Swatch itself is clearly mass market and, while they are ...

## Marketing Pollution-proof Products - China

"In February 2015, Under the Dome, a documentary that investigated air pollution in China, became a smash hit in China. It attracted hundreds of millions of viewers in a very short time after it went live online. The popularity of the documentary could be regarded as a demonstration of the ...

## Movie Sales and Rentals - US

"The Big Three subscription services have become staples of American life and are now also major forces in original content, with substantial ad budgets. Based on the success of these services, myriad new streaming services are sprouting up, including HBO Now, and Showtime Anytime. While households have often been willing ...

## Online Media Consumption Habits - China

"Offering personalised media contents and services will be big topics for online media operators, as consumers expect better customer service to become subscribers. For marketers, the growing popularity of online radio and evolving interactive technologies both exhibit good business opportunities. However, it is important to make sure that online advertisements ...

## Pães e Produtos Assados - Brazil

Leisure expenditures are expected to grow at nearly the same rate as overall US expenditures through 2020 as confidence remains high and as consumers become more experience oriented; however, several demographic and lifestyle shifts are expected to alter perceptions of leisure time and change consumer behavior. As the traditional 9-5 ...

## Marketing Health to Women - US

"Half of women consider themselves healthier today than they were a year ago. Generally, women are engaged in some aspect of their health – whether taking a vitamin, mineral or supplement, eating a healthy diet, exercising, or staying positive – yet express the most concern over the effects of stress ...

## Marketing to Sports Fans - US

"Technology has impacted sports by changing the way fans follow their favorite teams and as digital marketing takes precedence. Modern fans expect to be targeted online and will increasingly expect leagues to offer a seamless experience across various devices and platforms."

## Music Concerts and Festivals - UK

"The UK live music industry has continued to grow during the past five years, despite the tough prevailing economic environment. Despite steadily rising prices, consumers have demonstrated that they are still prepared to pay 'top dollar' to see the most popular acts, while festivals continue to draw the crowds, although ...

## Opportunities for the Contemporary Backpacker in South East Asia - Asia

"Just as the 'backpacker' industry adapted and evolved during the past hundred years to follow the progression of travellers from tramps to backpackers, the industry needs to adapt to the current forces of change that have resulted in the emergence of the flashpacker."

- Jessica Kelly, Senior Tourism ...

## Pet Insurance - UK

"O mercado de pão e produtos assados no Brasil ainda está em desenvolvimento. Os brasileiros estão consumindo mais pão embalado, mas isso não significa que estejam consumindo menos pão fresco feito em padarias. As empresas devem investir em inovação, especialmente de novos sabores e aspectos relacionados ao frescor do produto ...

## Plumbing Products - UK

"Wider economic conditions suggest that the plumbing products market is set for growth, yet this has yet to materialise to date despite equally strong conditions. The elements of the central heating market reliant on replacement sales continue to need government support to encourage consumers to make purchase decisions. Carbon emission ...

## Regional Newspapers - UK

Regional/local newspapers continue to struggle as the industry faces print circulation declines, job losses and closures. Publishers are putting extra investment into developing their online products in terms of content, format, advertising and paywalls in order to best compensate for the decline of print.

## Sports and Energy Drinks - UK

"After a period of robust growth, sales in the sports and energy market lost momentum in 2014. While energy drinks are doing well, this has been offset by the poor performance of the sports drinks segment. The energy drinks segment makes up the vast majority of the market. This has ...

## The Green Household Consumer - UK

"Performance and price dominate consumer considerations when it comes to shopping for household care products, with other factors, including environmental impact, falling by the wayside. A focus on the potential health benefits of eco-friendly formulations in addition to their minimal impact on the environment could help to drive consumer interest ...

## The World of Real Estate - US

"The pet insurance market has huge potential for growth, with 56% of pet owners currently uninsured. Pet insurers that wish to capitalise on this opportunity, however, face an uphill struggle as those yet to take out an insurance policy are put off by accelerating premiums that leave them questioning the ...

## Public Expenditure - UK

"Public spending as a percentage of GDP is set to further reduce during the current parliament from just under 41% to a projected 36.3% by 2019/20. Nonetheless, opportunities for private companies in public sector service provision remain aplenty, reflecting the continued drive for efficient service provision. Justice, defence ...

## Short and City Breaks - UK

"The outlook for the short break market is promising; overall, consumers are planning to take more short breaks in the next 12 months. The top three most popular overseas destinations for short breaks remain France, Spain, and the Netherlands, all of which saw growth. Holidaymakers' choice of destination is primarily ...

## Tendências em Comer Fora - Brazil

"Conveniência e experiência são fatores que podem contribuir para gerar diferenciação para o setor de foodservice. Por exemplo, mulheres de 16-24 anos querem economizar tempo, e os jovens em geral recorrem a pratos prontos, mostrando a importância da conveniência para este público. Enquanto que a lealdade da classe ABC1 pode ...

## The Online Foodservice Consumer - US

"Consumers continue to seek convenient solutions for their busy lives. One way to enjoy the restaurant experience without leaving home is to order foodservice foods via online ordering. Even restaurants not equipped for delivery now have the ability to employ the services of a third-party delivery service in order to ...

## Travel and Tourism - Australia

"The real estate market has begun to recover from the recent crisis. Mortgage rates are still low, housing prices have rebounded in many markets, and most people have a positive attitude toward buying property. However, there are social trends and economic challenges that are influencing the market, causing a shift ...

## Travel and Tourism - Indonesia

This report looks at the following areas:

## Travel and Tourism - New Zealand

This report looks at the following areas:

- How is New Zealand's movie industry adding to the tourism mix?
- Why are Millennials – a growing demographic – drawn to New Zealand?
- Why has there been a drop in the number of visitors from the UK?
- What makes ...

## Travel and Tourism - Thailand

This report looks at the following areas:

## Use of Insurance and Mortgage Brokers - Canada

"Improving the reputation and image of insurance brokers will require a commitment from the insurance industry to address issues surrounding transparency around broker compensation."

This report looks at the following areas:

## Travel and Tourism - Malaysia

This report looks at the following areas:

- Who is visiting Malaysia, and what are the most popular destinations?
- What are the opportunities for tourism in Malaysia given the increased competition for inbound arrivals across Asia?
- How is Malaysia positioning itself to appeal to emerging tourism source markets ...

## Travel and Tourism - Philippines

The following Mintel publications were drawn upon for this report and may be of interest to readers:

## UK Retail Briefing - UK

Each month Mintel's UK Retail Briefing concentrates on a particular sector or market. This month, however, we break from the norm and review retail sales by UK region.

This review looks at:

## Watches - UK

"As the smartwatch market develops, the smartwatch could become the latest desirable fashion accessory, posing a direct threat to the fashion watch market as both attract a young demographic. While uptake of smartwatches has been slow due to caution surrounding



first editions of new technologies, this is likely to change ...

## Winter Holiday Shopping - US

"Retailers have their work cut out for them during the 2015 winter holiday season given that 2014 was touted as one of the strongest in recent years. However, positive economic factors like higher consumer confidence, lower gas prices, and an improving job market signal that comping over 2014 is attainable ...

## Yogurt and Yogurt Drinks - US

" Total retail sales of yogurt and yogurt drinks posted 2.9% gains in estimated 2015. Pace has slowed from strong year-over-year growth in 2011-13 as the novelty of Greek-style products fade. Overall sales are expected to continue upward as consumers remain interested in health, nutrition, and high-protein food and drink ...

## 彩妆 - China

“较高的使用频率证实一旦消费者开始使用彩妆产品，大部分将养成每天化妆的习惯，这意味着在这类消费群体中提高使用频率的可能性非常有限。销量的增长将依赖产品系列的扩张、品类扩张或现有产品的高端化来实现。

## 网络媒体消费习惯 - China

“由于消费者只会在体验到更好的客户服务后才会考虑成为付费用户，因此提供个性化媒体内容和服务将会成为网络媒体运营商关注的热门话题。网络电台日益风靡和互动科技继续发展都为市场营销人员带来了绝好的商机。但是，确保广告不会干扰人们的媒体消费体验至关重要。”

— 顾菁，研究经理

## 防污染产品的营销 - China

“2015年2月，中国空气污染调查纪录片《穹顶之下》火遍全国，上线后短短时间内就吸引了上亿人次观看。该纪录片的超高人气可以被视为中国消费者对污染问题的高度关注和担忧。

## Yogurt - China

“Innovation to enrich an indulgent yogurt-drinking experience will drive further growth, since yogurt will be consumed on more casual occasions. Meanwhile, businesses can seek opportunities in different market segments by providing more appealing products to fulfil consumers’ specific needs. Manufacturers are required to provide detailed product information to convince consumers ...

## 婴幼儿个人护理用品 - China

“为了使婴幼儿个人护理产品具有更多的附加价值，公司和品牌可以借鉴其它婴幼儿行业（如婴幼儿配方奶）的成功案例来推广具有高级宣称（如含有亲和人体成分）或功效（如使宝宝更强壮）的婴幼儿个人护理产品。”

## 烘焙店 - China

“帮助烘焙店经营者客服障碍，安排营销活动的主次以及加速产品创新发展是一种全方位营销方法。年轻的职场消费者显然青睐快捷的轻食午餐和晚餐，而提供精美甜品的下午茶则格外吸引讲究时尚的年轻女性。重视家庭的消费者还对烘焙连锁店提供的健康早餐感兴趣。”

## 酸奶 - China

“随着酸奶将是更多休闲场合的选择产品，因此，能够带来美味享受的酸奶产品创新将继续拉动市场的进一步发展。与此同时，商家可以通过提供更具吸引力的产品，以满足消费者特定的需求，从而寻求不同细分市场的商机。生产商需要提供更详细的产品信息，从而使消费者相信产品的功效”。

— 刘超伦，高级研究分析师