December 2017

Airlines Worldwide - International

“Now the LCCs are increasingly looking for growth through establishing long-haul routes, as well as acting as feeders for long-haul flights. Not only are the dedicated LCCs like AirAsia X, WestJet, the Icelandic LCC WOW and Norwegian Airlines building up capacity in this market, but increasingly the LCC subsidiaries of ...

Alimentação Saudável - Tendências - Brazil

“Os brasileiros estão tentando adotar hábitos saudáveis em seu dia a dia, mas buscam fazer isso de maneira gradativa. Apesar da intenção de limitar o consumo de alguns produtos, como sal, açúcar, carne e carboidratos, a grande maioria ainda não tem a intenção de mudar radicalmente o hábito alimentar. É ...

Auto Service, Maintenance and Repair - US

"Auto service, maintenance, and repair are critical components of vehicle ownership. Vehicles require regular maintenance and upkeep to ensure their longevity and use, and neglecting such responsibilities can result in extremely costly repairs for consumers. Today’s consumers are aware of the necessary service and maintenance they must perform but are ...

Beer - China

“Lack of an official definition will not prevent craft beer from further proliferating in the market. Instead, this will allow market players – both small and large – to be creative crafting the product and marketing the concept.”

Beer - UK

“A likely growth segment in the coming years is low- and non-alcoholic beers. While decidedly niche, high profile launches from Heineken and Budweiser over the past year are helping to raise its profile and buoy growth.”

Black Consumers and Non-Alcoholic Beverages - US

Black consumers are estimated to spend $10.9 billion dollars on non-alcoholic beverages in 2017, a 2.3% increase vs 2016. Carbonated beverages rank first in sales among Black households, even while these consumers switch to healthier as well as naturally sweet beverages to quench their thirst and please their ...

Brand Leaders - UK

“Whether consumers are sympathetic towards their motivation or not, market-leading brands are using their resources towards the betterment of society. Of course, brands benefit from this in return through the positive consumer perceptions that are generated, whilst the popularity and widespread influence of the brands at large means that, whatever ...

Children's Eating Habits - UK

“Children’s likes and dislikes have the biggest influence on food bought for them by parents, which on the face of it poses a challenge for brands embracing a healthier proposition. However, parents and kids alike attach a very high importance to having a healthy diet. New or reformulated products, such ...

Cinemas - China

“Recovering from a glitch in 2016, cinemas are back on track and seeing sustainable growth. Facing fierce competition from video streaming services, cinemas need to continue to invest in the latest film technologies,

Coffee Houses - China

"Consumer spending at coffee houses is in a steady growth although some consumers may be switching to quality yet more convenient and value-for-money options such as in-home drip bag coffee and freshly brewed coffee from fast food restaurants. Coffee houses

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since rich formats are a key driver to convince consumers to go to the cinema instead of ...

Coffee Shops - UK

“Younger Millennials aged 18-27 and parents of under-16s make up the core consumers of the coffee shops market. Younger Millennials are drawn to new product lines, and parents care about ethical sourcing and premium quality experiences. As a group, they are spreading their budget across a larger number of establishments ...

Consumer Attitudes towards Retail Credit - UK

“Consumer credit has been rising fast to finance recent retail sales growth. But consumer confidence is falling and incomes are under pressure. We think that consumers will start to cut back and pay down some of their debt. So all credit will fall, not just retail credit. We think that ...

Contract Catering - UK

“The contract catering industry has maintained growth over the past year despite reduced margins. Margins were reduced as input costs grew significantly; a result of high inflation disproportionately driving food prices and heightened expenditure on labour forces tied to ongoing increases in the National Living Wage. Due to economic pressure ...

Cooking Sauces and Pasta Sauces - UK

“Interest in scratch cooking continues to pose direct competition to the market; the impending squeeze on consumer incomes is likely to spur this trend on. The market will also need to respond to the growing number of small households and ageing population in order to remain relevant against the UK’s ...

Dining Out in 2018 - US

"Restaurant sales are predicted to grow; however, on a more micro-level restaurants are struggling to maintain relevancy, with consumers faced with a variety of

may consider offering more food and alcoholic drinks to attract ...

Condiments - US

"Condiments and dressings are substantial and diverse categories with extremely high penetration driven by consumer loyalty to brands and product types, along with healthy reputations for adaptability, affordability, and variety. As these mature categories struggle to grow sales, getting back to growth will take effort from brands to find even ...

Consumers and General Insurance - UK

“Consumers are still extremely price sensitive when it comes to selecting a general insurance provider, as many see no reason to automatically renew with their existing insurer/s. However, the rollout of more loyalty schemes may help brands to improve retention and gain a valuable and regular touchpoint with Millennials ...

Cooking and Pasta Sauces and Marinades - US

The diverse cooking sauces and marinades category, which is ideally suited to those consumers interested in food and flavor exploration, has generated stronger growth in recent years than many other center-store packaged food categories. Looking ahead, the category offers opportunities for products that combine the convenience of premade with the ...

Digital Trends Quarterly: STBs and Streaming Devices - UK

“Another avenue of development that may increase the growth potential for the smartwatch market is the introduction of more models in the designer/luxury segment. The watch market has a well-established luxury segment in which people are willing to pay a significant premium for prestige, so high price points won’t ...

Domestic vs Overseas Tourism - Ireland

“Despite economic and political uncertainty and volatility following the Brexit vote, the tourism industry

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options to choose from when dining out. Chain and independent restaurants each play a vital role in meeting consumer dining preferences across demographics. In order to ...

Estate Agents - UK

“Given its sensitivity to economic processes, the estate agents market has been at the forefront of Brexit uncertainties over the past year. The market was able to maintain growth as it continued its trajectory of year-on-year increases, but market conditions and evolving consumer behaviour have forced structural changes, elevating online ...

European Retail Rankings - Europe

The European Retail Rankings focuses on the leading retailers in Europe and puts them in perspective. This is a report where the numbers are all important, though we also give some background information both by sector and by country. We provide a three-year record of the main statistics (in so ...

Free-from Foods - UK

“The free-from category’s strong sales growth in recent years now stands vulnerable to the squeeze on household incomes, as 47% of free-from buyers spend less on these products when money is tight. However, opportunities remain for premium and ‘shortcut' products to do well as people cut down on going out ...

Hispanics and Healthy Lifestyles - US

"In spite of higher overweight and obesity rates, Hispanics have a generally positive outlook on their personal health. Hispanics take pride in their health but are not necessarily willing to make changes to ensure a healthier life. A combination of complacency and confidence could prevent Hispanics from implementing new initiatives ...

Home Insurance - UK

continues to grow in NI and RoI alike as the destinations note an increase in visitor arrivals and tourist expenditure. Personalisation and freedom of choice are highly valued by Irish consumers when it comes to booking ...

European Retail Briefing - Europe

This month's European Retail Briefing includes:

Fish and Shellfish - UK

“A combination of rising prices and the outlook for a sustained squeeze on real incomes spells troublesome times for the fish and shellfish market. This is set to entrench and exacerbate the impact of these products’ relatively high expense in limiting usage. However, it is not all bad news, and ...

Healthy Eating Trends - Brazil

“Brazilians are gradually adopting healthy eating habits. However, despite the intention to limit the intake of salt, sugar, meat and carbohydrates, for example, the majority of consumers still don’t want to radically change their behavior. In this scenario, brands need to understand what consumers expect in terms of healthy eating ...

Hispanics and Non-alcoholic Beverages - US

"Hispanic expenditures on non-alcoholic beverages continue to grow at a healthy pace. The challenge for brands in the different categories is to promote trial as Hispanics may not proactively do so due to their satisfaction with the beverages they currently drink. As the markets mature and become fragmented, brands have ...

Household Surface Cleaners - US

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"The domestic home insurance market is mature and stable, albeit largely profitable. Innovation is needed to create real growth potential, especially in light of changing demographics and tenure patterns. Home ownership levels are falling and more people are living in the private rented sector. Insurers are thus starting to explore ...

Impulsionadores de Vendas no Varejo - Brazil

"O preço baixo é muito levado em consideração, porém varejistas podem explorar outras maneiras de atrair consumidores. Locais de compras capazes de criarem uma experiência agradável, com qualidade de atendimento e um ambiente de compras confortável, têm maior potencial para ganhar a atenção do consumidor."

– Andre Euphrasio, Analista ...

Loyalty in Financial Services - US

Loyalty is more than just a rewards program. It is not built on incentives, but on trust, something that is in relatively short supply in the financial services industry. Thinking about what consumers want and then building the tools to give it to them will go a long way toward ...

Marketing to Young Parents - China

"Chinese mums and dads have a higher tendency to share household responsibilities and a willingness to encourage independence in their children (and themselves) than previous generations have. Educational high-tech tools (eg language learning and financial management) and taking care of pets are more likely to be considered a help rather ...

Medical Equipment - UK

"Medical equipment manufacturers have traditionally sought to expand their range of products and services by acquiring and collaborating with companies that can offer complimentary products and services to their platform. Such collaborations are now occurring not only through traditional acquisitions and formal partnerships, but also through asset swaps, carve outs ...

Motorcycles - UK

"The household surface cleaner market experienced slow growth from 2012-17 and is expected to see sluggish growth through 2022 due to the maturity of the market. While the category encompasses six segments and several sub-segments, most of its market sales comes from only three segments: all-purpose cleaners, bathroom cleaners (toilet ...

Leisure Review - UK

"Consumers are seeking experiences more than ever so activities that provide this in a unique, immersive and active way are likely to be popular. Activities needn't be highly technological or obscure but rather bring people together and allow them to reconnect in an increasingly digitised world."

Magazines - UK

"Once again, overall print circulation figures do not make for pleasant reading. However the recent success of some print sectors, notably current affairs, does hint at a brighter future for some print titles than is often predicted. While magazines will obviously be investing heavily in developing and diversifying their digital ...

Mass Merchandisers - US

Nearly all consumers shop mass merchandisers and growth is expected to continue, but loyalty is generally low among mass shoppers, even among some of those who shop the channel the most frequently. As pressure increases from competition outside the channel, mass merchandisers need to address evolving consumer expectations in order ...

Middle Adulthood and Health - US

Middle aged adults (aged 45-64) make up an important, yet often overlooked, portion of the US population, and by 2022 will account for 24% of the total US population. Today's middle agers focus on improving their adherence to healthy behaviors, remain dedicated to the essentials of health management, and pay ...

Music Concerts and Festivals - US

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"Motorcycles have recently seen growing sales after what had been a period of decline. Yet with volumes set to fall in 2017 and market value being hit by the growing presence of low cost manufacturers, the future for the market remains to some extent uncertain. Opportunities exist yet it is ...

Natural and Organic Personal Care Consumer - US

Natural brands continue to experience growth, an affirmation of the importance placed on ingredient safety and the role natural and organic personal care (NOPC) products play in an overall wellness lifestyle. To expand consumer penetration of these products and advance sales growth, stakeholders should highlight NOPC products as part of ...

Online Gaming - China

"Consumers prefer playing online games with their real-life friends. This reveals an opportunity and also highlights the importance of connecting consumers' real-world social life with games, which will make consumers ambassadors of games, attracting new users and retaining existing ones when they invite friends to play with them."

Pets - Ireland

"Increasing humanisation of pets is seeing Irish owners willing to splash out more on their pets, with year-on-year growth of pet food spending. Three quarters of pet owners see their pets as members of their family, and as such are willing to spend more to cater to their needs." ...

Restaurant Decision Making Process - US

"As a whole, the restaurant industry continues to grow with total revenues reaching approximately $569 billion in 2017. However, many restaurants face an uncertain future due to shifting consumer dining preferences and an overabundance of restaurants in the market. It's harder than ever for individual restaurants to stand out in ...

RTD Alcoholic Beverages - US

The concert and music festival industry continues on its upward trajectory, as the number of tickets sold grows, ticket prices increase, and events regularly sell out. The success of the live music industry will likely endure as young adults, a core audience, grow their income and the economy remains strong ...

Natural, Organic and Ethical Toiletries - UK

"Ethical considerations are very closely connected to perceptions of natural/organic, with consumers associating brands with a strong natural/organic positioning as being ethical. Ethics are important to the consumer particularly when using a brand for the first time, highlighting the importance of brands promoting their ethical credentials to win ...

Online Gaming and Betting - UK

"Multichannel gamblers play primarily online but their retail habits are being kept alive by a continuing reluctance to take remote activity outside the home."

Processed Poultry and Red Meat - UK

"The income squeeze will see the competition for meal occasions heat up between proteins. While processed poultry and red meat stand strong in the areas of value and convenience, encouraging their use as ingredients will be needed as consumers turn to scratch cooking for savings."

Retail Drivers - Brazil

"Low price is a major influencing factor among Brazilian consumers, but retailers can explore other ways to appeal to them. Shopping centers and stores capable of creating a pleasant experience, with high-quality customer service and comfortable environment, have great potential to attract consumers."

Sauces and Marinades - Canada

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"45% of US adults drink RTD (ready-to-drink) alcoholic beverages. While 26% of category participants report drinking more RTDs in the past year, adoption by new consumers has stalled. The category trails behind other alcohol types in both consumption and sales, and is relegated to “also drink” status (only 11% of ...

Senior Lifestyles - US

"There are more than 50 million seniors aged 65+ in the US and this age group is growing more than three times faster than the total population, making them an important segment for marketers to consider. Since their career concerns are largely in the rearview mirror, seniors today are focused ...

Skincare Ingredient and Format Trends - US

The skincare market is highly saturated, and brands are challenged by consumer demand for simplicity as well as routine shopping behavior, limiting product trial. Focusing on unique offerings to capture the attention of consumers, such as Korean skincare trends and on-the-go formats, could nurture category growth. Eco-ethical claims will also ...

Small Kitchen Appliances - US

"The small kitchen appliance market has grown from the year prior. Fluctuating sales within the beverage making appliance segment tempered market growth, though there are opportunities to accelerate the market. Leveraging media channels to showcase the newest models or features could help educate consumers on the increased value and convenience ...

Sugar Confectionery - China

“The sugar confectionery market has finally regained resilience in retail value, though volume sales are still in decline as more health-conscious consumers are cutting down consumption frequency or switching to adjacent categories or other snacks.

Consumers’ scattered needs for either personal consumption or gifting speak volumes for the fragmented competition ...

As Canada’s demographic landscape evolves, consumers’ expectations of their food is evolving with it. Sauces and marinades are a large part of this evolution due to the category’s impact in providing new and different flavours in a convenient fashion. As a result, companies that capitalize on evolving formats and flavours ...

SIPPs - UK

“SIPPs have been the standout performers in the broader retirement savings market over the last decade, and the pension reforms introduced in 2015 have further boosted the segment. The flexibility offered by SIPPs makes them an attractive option for consumers looking to take full advantage of pensions freedoms. As a ...

Small Business Overview - UK

“SMEs are not only a highly important aspect of the UK economy, representing more than 49% of all economic activity, but have also outperformed the enterprise sector over the past five years, recording growth of 21% while enterprise growth has been restricted to just 8%.

– Terry Leggett, Senior Industrial ...

Sports Fashion - UK

“As the clothing market struggles due to consumers reaching ‘peak stuff’, sports fashion defies this and continues to gain momentum. Thanks to the popularity of the health and fitness market there is continued demand for trend-led sports apparel, with more non-specialists getting in on the action.”

– Chana Baram ...

Suncare - UK

“The value increase in the suncare market is thanks to sun protection. Led by frequent usage rather than advances in innovation, shoppers are trading down to more basic sun protection to overcome extra expense. Aftersun remains a small segment with consumers unconvinced by its benefits, while self-tanning has fallen victim ...

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Supermarket Retailing - Ireland

“Although supermarkets continue to dominate the market, their share of grocery sales has been steadily declining in recent years. The rise of discounters, coupled with the premium ‘facelift’ forecourt and convenience stores have witnessed, means that supermarkets are under intense pressure to continue to deliver on price and quality whilst ...

The Budget Shopper - Canada

Although most engage in budget-seeking behaviours, the majority of Canadians tend to keep an eye on their finances rather than stick to a strict budget. The flexibility in approach to monitoring their finances leads to some flexibility when shopping and receptiveness to deals found while engaging in the task. As ...

Tires - China

“Generally speaking, compared to tier one city tire buyers, those from lower tier cities are more practical and proactive and should be an area of focus for tire retailers. Highlighting safety-related features, instead of comfort will be an important way of drawing in these consumers. Brand name means more to ...

UK Retail Briefing - UK

This month's UK Retail briefing includes:

Virtual Reality - UK

“The market for VR headsets is growing rapidly but limited advertising has left awareness relatively low. New product launches, simpler set-up processes and falling prices will continue to boost take up, while innovative out of the home VR experiences are expanding. The key long-term will be creating engaging content that ...

Tableware and Cookware - UK

“The table and cookware sector will experience good growth in 2017, before experiencing a slowdown over the next five years partly as a result of kitchens getting smaller. Opportunities to cushion this fall in demand lie in innovation in kitchenware.”

– Jacob Holder, Retail Analyst

The Leisure Outlook - UK

“Changes in leisure activity participation and spending indicate that consumers are choosing quality over quantity when it comes to drinking and dining out. Increased voucher usage also reflects that Brits are keen to keep up their leisure habits but seeking ways to make this more affordable.”

– Helen Fricker ...

Travel Agents - UK

“Small independent shops may struggle to compete with the leading chains when it comes to the latest technology, but with Thomas Cook and TUI focusing increasingly on selling their own bespoke holidays, this opens up an opportunity for independent shops to sell a greater diversity of products, and to proactively ...

Utility Capital Expenditure - UK

“The business environment is in transition across the utility sectors, with the industry challenged by a changing regulatory environment, climate change, security of supply and uncertainties regarding future network requirements. These factors also influence the industry’s approach to capital expenditure.

Infrastructure investment will continue to be a key focus across ...

Wealth Advisory Services - Canada

“Old is gold when it comes to wealth with over-65s being the most affluent and having the highest ownership of investments.”

– Sanjay Sharma, Senior Financial Services Analyst

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Wearable Technology - UK

“Smartwatches and fitness trackers in particular are becoming increasingly advanced, and the value of these devices is becoming clearer to consumers. Technology for managing health and wellbeing will continue to appeal, whilst functionality such as cellular connectivity will promote these devices as potential stand-alone devices for adults and children alike ...

Wearable Technology - US

"The year 2017 was a disappointing year for wearable tech. Marquee brands have seen unfortunate reversals of fortune, including declines at Fitbit, GoPro, and Garmin. However, on the basis of burgeoning sales of smartwatches, hearables, and high-end fitness bands with LED (light-emitting diode) screens, Mintel sees shipments returning to growth ...

White Spirits - US

"Distilled spirits (white and dark) are expected to flourish, growing 11% through 2022 with white spirits making up majority of volume sold. Sales of white spirits will maintain forward momentum as interest in craft, premium spirits, and cocktails grows. While vodka’s versatile flavor profile has kept it as the leading ...

White Spirits and RTDs - UK

“Recommendations, either from friends/family or from drinks professionals, are pivotal in bringing new users to white spirits. Shared discounts and marketing themed around shared knowledge offer viable means for companies to persuade people to recommend their products. The influence of bartenders also offers venues scope to encourage trading up ...

咖啡店 - China

“尽管部分消费者转向在家饮用更方便且优质的咖啡，如在家饮用的挂耳式咖啡和快餐店的现磨咖啡，但消费者在咖啡店内的消费呈稳步增长趋势。咖啡店可考虑丰富食物和酒精饮料选择，吸引更多消费者并扩大光顾场合。”

– 陈杨之，研究分析师

啤酒 - China

“精酿啤酒虽然没有标准定义，但却在市场上日益流行。恰恰因为该细分缺乏统一定义，所以啤酒品牌无论规模大小，都可在精酿工艺和理念推广方面发挥创造性。”

– 顾菁，研究总监，食品与饮料

电影院 - China

“在历经2016年的短暂疲软后，影院市场重回正轨，恢复可持续增长。面临在线视频的激烈竞争，电影院需要继续投资最新电影技术，因为丰富的形式是驱动消费者去电影院，而不是在家中看电影的重要因素之一。”

– 黄一鹤，研究分析师

糖果 - China

“糖果市场的销售额终于出现反弹，但销量仍在下滑，原因在于越来越多的消费者降低吃糖果频率，或转向邻近品类或其他零食。

消费者零散的个人消费或送礼需求形成一种分散的竞争格局。无论品牌大小，糖果公司仍有机会通过以下方式提高竞争优势：强化健康功效和通过传达更多的互动体验增强情感依恋。”

– 吴丝，研究分析师

网络游戏- 中国 - China

“消费者更喜欢和现实生活中的朋友一起玩网络游戏。这为品牌指明了市场机遇，也突出了将消费者的现实社交生活和游戏联系在一起的重要性——消费者邀请朋友一起玩游戏时扮演者游戏代言人的角色，有助于游戏品牌吸引新玩家并留住现有玩家。”

轮胎 - China

“整体而言，二三线城市轮胎购买者比一线城市的轮胎购买者更务实和主动，轮胎零售商应着眼于这一人口群体。突显安全性（而不是舒适性）将是吸引这些消费者的重要途径。对于首次购车者和年轻购车者，品牌名称更重要。因此，直播是创建积极品牌形象时值得考虑的工具。”

– 过人，高级研究分析师，中国

针对年轻父母的营销 - China

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“与前几代人相比，当代中国父母更倾向于分担家务责任，也愿意让孩子（和自己）变得更独立自主。他们更有可能认为使用教育性的高科技工具（如语言学习和理财等工具）以及照顾宠物有助于孩子成长，而不会认为它们分¬¬散孩子注意力。”

– 马子淳，高级研究分析师

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