

August 2017

Airlines - UK

“Airlines have enjoyed strong growth over the past two years. Cheap oil has kept fuel bills down, and the savings enabled airlines to cut fares. However, Brexit is casting a shadow on the industry. There are concerns over the Open Skies Agreement, airline ownership rules and declining consumer disposable income ...

Attitudes toward Gaming - Canada

The video game console hardware market has not seen growth in volume sales for several years. However, this represents an evolution of the video game market where brands in the category are putting emphasis on software and online services. The rise of mobile gaming (ie smartphones, tablets) is challenging dedicated ...

B2B E-Commerce - UK

“The e-commerce market is reported to account for 17% of all business, with EDI accounting for 9.8% and 7.2% derived from website sales. The website share of all business is growing while the share accounted for by EDI is declining, reflecting the nature of business conducted through the ...

Beer - Brazil

“The beer market is passing through a transition period in Brazil. As general consumption declines, with consumers concerned about health and interested in alternatives to standard beers, brands have the opportunity to expand their portfolio, offering more healthful, lighter options and a greater variety of flavors to appeal to consumers ...

Breakfast Cereals - UK

“Fragmented eating habits have added to the woes of RTE cereals, with many cereal eaters skipping breakfast or snacking instead. Offering branded sweet snacks suited to eating on the go other than the well-established cereal bars would allow companies to better capitalise on consumer snacking tendencies while also appealing to ...

Attitudes to Advertising - Ireland

“Despite taking steps to avoid advertising, there is currently little appetite among Irish consumers to pay for a premium service to do so. This does not mean that consumers accept or are happy with the advertising experience that they receive. Instead, consumers may think that these services do ...

Attitudes towards Private Label Alcoholic Drinks - UK

“Highlighting the heritage of the producers behind private label alcohol and giving more information about how and where the drinks are made will elicit more trust from consumers. Similarly, flagging up the skills and expertise of their in-house experts will help to build confidence in private label ranges.”

Bathrooms and Bathroom Accessories - UK

“Consumers are attracted to retailers that can offer a full planning and design service, highlighting the importance of attracting and training good staff in stores. Designers have a significant opportunity to help households manage their bathroom clutter by injecting additional storage solutions, including shelves and fitted furniture. Those retailers that ...

Black Haircare - US

“The Black haircare market is in transition, as soft sales growth is wedged between two, very different consumer trends. One, a booming natural and regimen-focused product segment vs the precipitous sales free-fall of relaxers, which were formerly anchor products for several heritage brands. Black consumers prefer, and expect, haircare products ...

Burger and Chicken Restaurants - UK

“Parents are vital to burger and chicken restaurants as the population of 0-14 year-olds grows. Brands are focusing on non-core items to boost snacking occasions, while diners want to see less sugar, fat and salt in burger and chicken meals. Yet the sector is experiencing the halo effect, with diners ...

Cerveja - Brazil

"A categoria de cervejas passa por um momento de transição. Devido à queda no consumo em geral, à preocupação com a saudabilidade e ao interesse do consumidor por outros tipos de cerveja que não a comum, as marcas têm boas oportunidades para ampliar seu portfólio de produtos, trazendo opções mais ...

Coffee - UK

"While the market continues to enjoy value growth, recent stagnation in household penetration of coffee pod machines is curbing the volume performance. Exploring subscription models could tackle the barrier that the upfront cost of the machines poses. Meanwhile, variety packs featuring coffee with different roast styles and origins could help ...

Coffee and Tea on Premise - US

"The coffee house market continues to experience strong growth thanks to the popularity of regular coffee, flavored coffee drinks, and the proliferation of third wave coffee. While retail coffee/tea is inexpensive and convenient, restaurants continue to deliver on innovation and quality. The on-premise coffee/tea market is highly competitive ...

Contraceptives and Sexual Health - US

"The majority of adults who disclosed their sexual activity currently use a contraceptive product, denoting a strong base of contraceptive and sexual health users. Yet, category sales only improved incrementally from 2016-17, as the male contraceptives segment struggled. Reliance on previous product experiences and a degree of embarrassment involving the ...

Credit Cards - UK

"Credit cards have become increasingly accessible and affordable through a glut of good deals, whether people are looking to be actively rewarded for spending or are simply in the market for a plastic safety net. Rapid growth over the past five years has attracted attention from the regulators, and any ...

Domiciliary Care - UK

China Outbound - China

"From now to 2040, tourism will witness a golden period. More than 14 billion trips will be made by 2040, which equates to every Chinese travelling at least nine times within the year."

– **Li Jinzao, head of the China National Tourism Administration**

Coffee and Sandwich Shops - Ireland

"Usage of coffee and sandwich shops has remained strong between 2016 and 2017 despite the increasing costs of coffee and Brexit impacting upon consumer confidence. The need for convenient hot drink and food options will help to sustain the market throughout 2017, while the need for healthier options will help ...

Commercial Mortgages - UK

"One year on, new commercial property lending activity looks to have remained largely unchanged despite Brexit, though it fell as expected from 2015. However, the structure of the market has changed, with a suppression of major financial commitments, a shift from new acquisitions to refinancing of existing deals, widening regional ...

Cookies - US

"As a commonly purchased food, cookies continue to grow, but at a modest pace from 2016-17. Mintel expects continued yet limited growth through 2022 as smaller segments better-for-you and premium cookies grow with differentiated positioning and unique flavors and formats. Elements of health may appeal to some consumers, but the ...

Digital Advertising - US

"Propelled by growth in mobile and social, digital ad sales in total increased by more than 20% annually from 2014-17, but rapid growth in mobile and social is stunting other opportunities, particularly considering that desktop remains the primary platform for browsing and streaming video among large sections of the adult ...

Eating Out Trends - Brazil

“Much of the business for commercial operations is likely to continue to be focused on supply contracts for local authorities. However, many commercial operators are expected to increasingly promote private sector services directly to customers amid increasingly tight margins in the sector, and the commercial implications of high exposure to ...

Energy Industry - UK

“The recent rise in switches reflects the growing number of new suppliers entering the market, increased price competition, a quicker and simpler switching process, as well as increased public awareness about the potential savings offered by switching suppliers. However, despite the uptick in switching rates, around two-thirds of consumers are ...

Facial Skincare - China

“Consumers think basic product benefits like hydrating and whitening are the most important signals when they are evaluating product effectiveness, indicating the core impressions brands should deliver primarily. Safety assurance, like no irritation, no side effect, are also the things every brand must get right. Upon that, advanced functional benefits ...

Fragrances - UK

“After two years of disappointing sales performance, the fragrance sector is estimated to see modest growth in 2017. NPD in both the fragrances and body spray sector has encouraged people to spend more, however, consumers remain price-savvy and high-end fashion brands increasingly face competition from beauty and high street fashion ...

Frozen Breakfast Foods - US

“The market for frozen breakfast foods has entered into a relatively stable period of stagnation, with frozen handheld options managing a degree of growth, as they cater to consumer demand for easy-to-use and portable breakfast foods. Interestingly, a chief competitor to the category, restaurant breakfast menus, may well be encouraging ...

Home Laundry Products - US

“It is important that restaurants continue investing in innovation, both in the menu and its environment, to maintain consumers’ interest and build loyalty. Actions that improve the cost-benefit of eating out can be more important than promotional prices.”

European Retail Briefing - Europe

Analyst comment on Ceconomy and the demereger of Media MarktSaturn from Metro Group.

Fashion Technology & Innovation - UK

“The most successful fashion retailers will be those that use the latest technology cleverly to enhance the shopping experience and to tap into changing shopping behaviour. By balancing the increasing automation of retail, with consumers showing a high level of interest in self-service tills and digital screens in-store and chatbots ...

Free-from Foods - Ireland

“The Irish free-from market has enjoyed growth over recent years, driven by ‘lifestylers’ and wider availability of products in supermarkets. Mintel expects growth to continue, however manufacturers will need to adjust the sugar content and the prices of their products where possible as these are key barriers to purchasing and ...

Hispanics and Household Products - US

“Hispanics’ expenditures on household products such as household surface cleaners, dishwashing products, and laundry detergent showed moderate growth from 2012 to 2017. These are mature categories in which Hispanics exhibit high levels of satisfaction and limited motivation to change. As functional factors are the foundation in these categories, brands may ...

In-salon Hair Services - UK

"Home laundry products are a mature category in which price competition between leading brands continues to dampen sales growth. Innovations in format and scent are proving important drivers for category growth, as consumers are driven by scent and convenient, all-in-one formulas. Product safety and eco-friendliness remain on the periphery of ...

Loyalty and Rewards in Financial Services - Canada

"Consumers generally understand and appreciate the concept of sharing data in exchange for value so the challenge for loyalty programs is to better understand what specific customers want in exchange for their data."

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

Marketing to the Over-55s - UK

"Age-related stereotypes continue to pervade the advertising landscape, with depictions of the over-55s often perpetuating a model of senior life that is at odds with how most 55+-year-olds see themselves. Campaigns that align their representation of older people more closely with the age group's own assessment have the opportunity ...

Music Concerts and Festivals - UK

"Technology is helping to increase spend while at events and cashless payment in the form of wristbands is likely to become fully available. Consumers are seeking out more experiences than material possessions which is benefitting the music festival and concert market."

– **Helen Fricker, Senior Leisure Analyst**

Online & Mobile Banking - Ireland

"From tentative beginnings, online banking has established itself as the dominant and preferred channel for Irish consumers. With consumers living their lives increasingly online, it is only natural that this is extended to how they manage accounts and interact with their financial services providers."

– **James Wilson, Research Analyst**

Pet Food - UK

"The current expected value growth of the in-salon hair services market can be credited to expensive colour trends and a subsequent focus on hair health. However, a predicted decline in disposable income will mean salons need to prove their value in innovative ways, and reward current clientele to ensure their ...

Luxury Goods Retail - International

"Growth in the global luxury goods market accelerated in 2016. Whilst the market continues to face a significant amount of uncertainty, consumer confidence remains high, the number of High Net Worth Individuals (HNWIs) continues to grow and the economy in a number of the key luxury markets is recovering. As ...

Millennial Dads - US

"There are an estimated 22 million Millennial dads in the US, aged 23-40. The majority of this population has kids under the age of 12, although a growing number are seeing their kids enter their tween/teen years. As this young group becomes fathers, they are taking a different path ...

New Retail - China

"Not content with revolutionising China's retail market by growing online retail, and Alibaba's dominant share, Jack Ma is now implementing the merger of online and offline retail into 'New Retail'. But this 'New Retail' is not simply the sum of two parts. What we are beginning to see is an ...

Payment Preferences - China

"The usage rate of mobile payments was only 1 percentage point higher than that of credit cards in 2015. After just one year, transaction values via mobile payments has already doubled that via credit cards. Even cash has become the second most used payment method. High earners in tier two ...

Pet Food - US

“The cat and dog food market has benefited from the humanisation of pets, with owners becoming more conscious of the quality of food that they feed their pets. However, pet obesity rates in the UK are rising; brands that look to emphasise the diet-friendly credentials of food should find favour ...

Pet Insurance - UK

“The fall in subscriber growth in 2016 shows there are challenges to overcome in pet insurance. However, most pet owners don’t have insurance, so there are plenty of opportunities to expand the market. As long as premiums can be kept at a reasonable level, and the benefits of policies are ...

Public Expenditure - UK

“A year on from the Brexit referendum, the primary determinate of public expenditure in the period beyond exit negotiations remains the speculative impact that renegotiated trade deals will have on national income. This uncertainty was compounded by the 2017 general election, which revealed growing weariness from the public around ongoing ...

Retirement Income Solutions - UK

“Despite fears that abolishing compulsory annuitisation would sound a death knell to a market already facing major challenges, Mintel’s research shows that there is still a core group of DC pension savers who are keen on considering an annuity as part of their retirement plans.”

– Sarah Hitchcock, Senior ...

Sports and Energy Drinks - UK

“Consumers show real interest in fortified water products that offer sports and energy benefits, and in health drinks from brands already active in these markets. This interest suggests areas for operators to explore in order to build relevance among a wider audience, and as well as offering opportunities in the ...

Tea and RTD Tea - US

The pet food market continues to make steady, slow gains, especially the treats market, reflecting the importance pet owners place on pampering and care. Pet owners increasingly look for food that aligns with their own personal dietary preferences and beliefs. In addition, the pet food retail landscape is shifting as ...

Pregnancy and Health - US

"The US continues to experience low birth rates. Despite this, pregnancy specific products that address the nutritional and physical needs of pregnant women continue to roll out. Pregnancy related attitudes and ailments will drive the need for functional products that can give women the peace of mind they are doing ...

Retailer Loyalty Programs - Canada

Memberships in loyalty programs are high with 91% of consumers claiming to belong to a program, with the greatest engagement seen in categories that meet staple needs. Shifting household structures and consumer shopping habits means that traditional points collection methods may lose relevance. Ultimately, loyalty programs are working to keep ...

Social Media in Foodservice - US

"The dining out landscape has permanently been impacted by social media from both a marketing standpoint and the actual on-premise experience. Social media has created a new focus toward the concept of being an influencer, whether on a small or large scale, and iGens and Millennials have specifically adopted social ...

Sports Betting - UK

“The sports betting market, now dominated by online activity, is looking for mobile users to extend their staking habits beyond the home and for social media to finally come of age as a platform for play.”

Tendências em Comer Fora - Brazil

"Dollar sales of tea are projected to reach \$8 billion in 2017. The market has continued steady dollar sales growth, increasing 24% from 2012-17. 79% of US adults drink tea, 60% drink RTD options, and 49% drink bagged/loose-leaf varieties. Good news comes from the fact that a higher percentage ...

The Ethical Brand - UK

"The ethical perception of brands is generally improving, even within sectors that have previously struggled with negative connotations, such as financial services. These rising standards mean that there is little room for complacency among brands. Anyone content to merely maintain the status quo is at risk of falling behind competing ...

The Leisure Outlook - UK

"Leisure activities are driven by younger Millennials and parents of under-16s. Eating at pubs is a popular leisure activity, yet so is staying-in and ordering a takeaway. As the pay squeeze intensifies, more people are turning to free activities such as museums and galleries. Meanwhile, people are continuing to focus ...

The Over-65s and Financial Services - UK

"The over-65s have significant spending power and financial knowledge that they share with other family members. However, they are often overlooked by financial services providers, or marketed to via patronising representations of how life should be at this age. Recognising the diversity of financial needs among this age group is ...

Thermal Insulation - UK

"The new private owners of the Green Deal Finance Company, which was revived in June 2017, have said they will use the Green Deal to address new legislation-driven demand in the private rented sector. However, with the Green Deal only in soft launch phase as of mid-2017 with just six ...

Travel and Tourism - Kazakhstan

"É importante que os restaurantes continuem investindo em inovações, tanto no cardápio quanto no ambiente, para manter o interesse dos consumidores e criar fidelidade. Ações que melhorem o custo-benefício de comer fora podem ser mais importantes do que os preços promocionais pontuais."

– Andre Euphrasio, Analista de Pesquisa

The Insurance Purchase Decision - US

"Insurance is not a product consumers particularly like to buy, and they don't typically switch companies once they have purchased what they need. Insurers need to find new customers where possible, often among young people or those who are entering a new lifestyle. Once they get a new customer, interactions ...

The Natural Consumer - US

"Interest in natural living is largely driven by consumers' desire to improve their health and to feel better. While Natural Consumers are committed now and in the future to natural living, they aren't entirely sure what "natural" means. The perceived high cost of natural products and already favorable perceptions of ...

The Spanish Hotel Sector - Spain

"Spain's hotel sector is currently benefiting from the long-awaited recovery of the Eurozone economy. Also, security concerns in formerly popular tourist destinations in North Africa and Turkey are diverting tourists to the perceived safety of the Iberian Peninsula, which is boosting hotel performance."

Travel and Tourism - Bangladesh

"With improved air connectivity, new luxury hotels and development of its tourism hotspots, the emerging economy of 'Beautiful Bangladesh' aims to be the next 'undiscovered' destination in Asia."

– Jessica Kelly, Senior Tourism Analyst

Travel and Tourism - Malaysia

“Kazakhstan presently lags behind many competing destinations when it comes to its tourism infrastructure, products and accessibility. Similarly many of those working within Kazakhstan’s tourism industry lack skills and expertise, with jobs in the sector traditionally held in low regard. Kazakhstan is, however, a country in the midst of a ...

Travel and Tourism - Pakistan

“Tourism is a tool for economic and social development ... and there is a need to concentrate on religious, sports and cultural values of our society and portray a positive image of Pakistan to the rest of the world.”

- Chaudhry Abdul Ghafoor, managing director, Pakistan Tourism Development Corporation, March ...

Travel and Tourism - Vietnam

“The future is looking exceptionally bright for Vietnam as a tourist destination and it is clear the tourism industry is set to grow as the country continues to establish itself as one of the leading destinations in South East Asia. Welcoming more than 10 million international visitors for the first ...

UK Retail Briefing - UK

Each month Mintel’s UK Retail Briefing concentrates on a particular sector or market. This month, we look at Online retailing.

Yogurt - China

“Leading companies keep investing in ambient yogurt, which has the highest penetration among all types of yogurt or yogurt drinks. To further increase consumption frequency, brands are looking for new approaches to build association with certain occasions. Though better-for-you is the ultimate trend, yogurt brands should not take away all ...

健康生活趋势 - China

“Malaysia has much to offer as a tourist destination with its unique diversity of culture and ethnicity that incorporates a wide range of Malay, Chinese, Indian and European colonial influences visible throughout its cities, languages, gastronomy and landscapes. Following a difficult year in 2015 after the two Malaysian Airlines disasters ...

Travel and Tourism - Thailand

“The tourism industry is now at the cusp of change. We are re-inventing and repositioning ourselves in line with the changes taking place in global travel trends.”

- Mrs Kobkarn Wattanavrangkul, Minister of Tourism and Sports

Trends in Health & Wellness - China

“Consumers feel healthier than two years ago, while a good number of them are more interested in holistic and non-medical health management approaches. As the importance of emotional healthcare is increasingly acknowledged, more people tend to eat healthy food and do sports not just for health but to induce happy ...

Winter Holiday Shopping - US

“There’s an optimistic outlook for the upcoming winter holiday season, with growth expected to continue and most consumers planning to spend more or make no changes to their winter holiday spending. Consumers are doing more holiday shopping online and that has changed other shopping preferences, including purchase timing and deal-seeking ...

Yogurt and Yogurt Drinks - US

The yogurt and yogurt drink category is expected to decrease 2.5% in 2017 to become an estimated \$8.5 billion category. Spoonable yogurt is expected to see the biggest sales decline of just over 4%, while yogurt drinks continue their growth boom with another year of double digit growth ...

支付方式喜好 - China

“消费者感觉比2年前更健康，其中相当一部分人对非医疗性的整体健康管理方式更感兴趣。随着精神健康的重要性得到更多认同，更多人倾向选择健康饮食和运动健身，不仅为了体格健康，也为了调节情绪，开心快乐。他们也积极参与时尚、有趣的娱乐活动以及享受放松的项目，让每一天的生活都精彩纷呈、充实而有意义。”

— 马子淳，高级研究分析师

新零售 - China

“阿里巴巴并不满足于仅通过发展线上零售来撼动中国零售市场的格局。阿里巴巴的‘灵魂人物’马云提出了融合线上和线下以打造‘新零售’的理念。‘新零售’并非线上和线下两部分的简单相加。中国消费者的购物方式正发生着翻天覆地的变化。购物成了更广泛意义上的客户服务体验的一部分——无论通过线上还是实体店获得。这一转变将彻底改变消费者、品牌和零售商之间的关系。事实上，这一转变已经开始改变人们的购物期望及其消费方式。”

— 郭马修，亚太研究主任

面部护肤品 - China

“消费者认为补水和美白等基本产品功效是象征产品有效性的最重要信号，揭示出品牌需要传递的首要形象。安全保证，如无刺激、无副作用，也是品牌需要涵盖的产品特征。在此基础之上，先进的功能益处（如紧致、盈润）是品牌可以考虑，用于超越对手的差异化优势。”

2015年，移动支付的使用率只比信用卡的使用率高1个百分点。仅仅过了一年，移动支付交易额就已经是信用卡交易额的两倍。即使是现金也退居成为第二大支付方式。二、三线城市高收入者对无现金支付表现出最强的意愿，应得到更多的关注。

— 过人，高级研究分析师，中国

酸奶 - China

“领先的公司持续投资常温酸奶，在所有类型的酸奶或酸奶饮料中，该品类的渗透率最高。为了进一步提高消费频率，品牌正在寻求新方式，以创建与特定场合的关联性。虽然有益健康是终极趋势，但酸奶品牌仍需注重口味享受”。

— 倪倩雯，研究分析师:食品和饮料