

September 2015

Airlines - China

“Chinese consumers place great importance on efficiency when taking flights. They are most likely to pick an airline based on on-time rate, number of connecting flights and the convenience of transportation from the airport/terminal in addition to price and flight time. Furthermore, Chinese consumers are also most willing to ...

America's Pet Owners - US

"Owning a pet can be anxiety inducing, and each pet comes with its own unique set of challenges. These challenges may discourage pet owners from obtaining more pets or getting another pet after a pet passes away. The most common challenges include keeping the house clean, paying for medical care ...

Attitudes towards Healthy Dining Out of Home - UK

"Despite the attention attracted by healthy eating, the emphasis needs to be on taste first and health second in the foodservice, as eating out remains a leisure activity at heart."

– **Helena Childe, Senior Foodservice Analyst**

Beauty Accessories - US

The \$3 billion beauty accessories market has shown slow, uneven growth in recent years. However, while the largest market segment, hair accessories, has effectively stagnated, there are strong areas of growth and innovation in the smaller make-up and shower accessories segments. Indeed, a number of smaller players have seen sales ...

Budget Airlines in the US - US

“The low-cost airlines – Southwest, JetBlue, Virgin America, Spirit, Allegiant, and Frontier – are growing much faster than the mature network airlines which merged when they emerged from bankruptcy. They grow faster because of their low costs, specifically low labor costs, which in turn allow for lower fares. The faster ...

Airlines - UK

“Judging by the increase in aircraft orders over the past year, airlines are confident about the future of the market. However, they also realise that there will be some intense competition for customer acquisition in the form of price wars and customisable flight experiences. As a result, consumer data and ...

Attitudes to Seasonal Celebrations Foods - UK

“Indulgence tends to take centre stage within seasonal celebration foods, with these occasions providing an excuse for people to focus on taste rather than healthiness, even if they are typically diet-conscious. However, that one in four seasonal food shoppers would be interested in purchasing healthier versions of food for seasonal ...

Baby Supplementary Food - China

“Emphasising naturalness and purity, harnessing the benefit of organic ingredients, and expanding more eating occasions with convenient and complementary nature are all possible ways to boost the usage of baby supplement food in China. “

Breakfast Cereals - UK

"Overall average retail prices were rising between 2010 and 2013 but owing to the rise in popularity of the discount supermarkets and bargain stores there has been deflation in the market over the last two years. Consumers' breakfast habits are changing, with a wider variety of foods available, providing enticement ...

Café - Brazil

“A vida dos brasileiros está cada vez mais agitada, o que gera uma crescente demanda por produtos mais práticos. Como consequência, tem crescido o desenvolvimento e lançamento de novos produtos de café em cápsula. No entanto, o café filtrado ainda é de longe o tipo de café mais consumido no ...

Camping and Caravanning - Ireland

Ireland experienced an unseasonable and heavy rainfall-filled summer in 2015, which is likely to have had a detrimental effect on the number of Irish consumers camping or caravanning. Given that camping is a more weather-sensitive activity than other holiday types, poor weather conditions during peak camping months are likely to ...

Charitable Giving - Ireland

"Slacktivism is popular in Ireland, with Irish consumers showing a preference for interacting with charities through 'liking' their social networking pages, signing online petitions and posting pictures and videos of fundraisers. Thus further integrating these platforms into their promotional activities and encouraging consumers to interact with them can help charities ...

Coffee - Brazil

"Brazilians are getting busier and demand more practical products. Due to this, the development and launch of new coffee capsule products has skyrocketed. Nevertheless, filtered coffee is still the most consumed type of coffee by a long shot. The growing interest in specialty or gourmet coffees is generating demand for ...

Consulting Engineers - UK

"The reform of the Highway Agency, now known as Highways England, should give contractors and consultants the confidence to recruit and train the skilled workers required to deliver the increase in transport projects over the coming years. The reform should also result in quicker, more efficient delivery, as work will ...

Consumers and Retail Banking - UK

"Mobile and online are the most frequently used banking services, but far from gathering dust, branches are supporting a resurgence in trust for banks as time distances them from the financial crisis. The decision on whether to innovate or integrate with existing technologies can mean the difference between grief and ...

Canadian Pet Owners - Canada

"Pets are common among Canadian households. The relationship between owners and their pets runs deep, driving an approach to care akin to that of a parent and their child. As pet owners feel that the benefits of owning a pet far outweigh the work involved, they are often willing to ...

Cloud Computing - UK

"Companies that have a heritage of website hosting are cash rich, so acquisition activity is strong in cloud computing as they vie for market share and the skills and infrastructure to offer a range of services as the market moves from infancy towards full cloud adoption. At the same time ...

Coffee - US

Total retail sales of coffee posted 8.7% gains in estimated 2015. The strong year-over-year growth seen through 2012 slowed in 2013 and 2014 as manufacturers and consumers felt coffee's increasing prices.

Consumer Payment Preferences and Behaviors - US

"The payment industry is undergoing massive changes, driven primarily by new technology that is affecting all aspects of the industry. There is a huge difference in payment preferences and expectations among generations, with younger generations shying away from the credit cards older generations love and embracing other methods of payment."

Cookies - US

"Cookie sales are on a general upward slope, with healthier cookies braced to experience the strongest growth through 2020 as the segment leverages its strong appeal among the category's biggest demographic: young families. Standard cookies will remain the largest segment, as consumers embrace them as affordable indulgences for themselves and ...

Credit Cards - Canada

"Although the credit card market in Canada is highly saturated, there are pockets of opportunity such as younger consumers and LGBTs for companies to tap into."

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

Digital Trends - US

"With the rapid adoption of smartphones and upgrades to the larger screen sizes of phablets, a host of activity formerly conducted on PCs is now being accomplished on phones instead. In many cases, the loss in penetration in activities on a PC is identical to the gains seen on phones ...

DIY Home Improvement and Maintenance - US

The DIY home renovation market is on the rise in an improving economy as more consumers engage in discretionary projects to fix up their homes. Prospects for continued growth look good as the emerging generation of new DIYers engages in projects that allow them to add a personal touch to ...

European Retail Briefing - Europe

This month ERB includes:

Families Dining Out - US

"While parents on average have higher incomes than the national average their costs of living are exponentially higher. As such, they are much more likely to report cooking at home to save money as well as using deals when they do go out to eat. Restaurants need to focus on ...

Fragrances - China

Dark Spirits and Liqueurs - UK

"The commoditisation of flavoured vodka provides a cautionary tale for dark spirit brands to take heed of to try to retain the inherent premium image of the market. The Famous Grouse provides a good example of a brand that has innovated with different expressions while simultaneously promoting itself as a ...

Digital Trends Autumn - UK

"The impact of the newfound popularity of 'phablets' (5"+ smartphones) cannot be understated. Phablets have not just put a dent into sales in the neighbouring tablet market but also look set to radically change mobile behaviour. There are already signs that the increased uptake of larger screens has broken down ...

Domiciliary Care - UK

"People in need of care services tend to prefer to receive help in their own homes to maintain a sense of independence and reduce disruption to daily activities, such as visits from friends or family, which may not be as achievable in a different care setting. With the UK's ageing ...

European Retail Handbook - Europe

This is the 19th edition of the European Retail Handbook. In it we provide the essential background information to understanding the retail scene in each European country.

Food and Non-food Discounters - UK

"In both food and non-food retailing discounters are making a big impact and they still have some way to go. We expect a period of consolidation in non-food discounting which will begin with Poundland absorbing 99p Stores. But even with that bonus Poundland and its multi-price peers led by B&M ...

Free-from Food Trends - Canada

“Market growth has been stagnant due to the economic slowdown. FMCG brands in China have seen declining growth and international groups such as L’Oréal and Estée Lauder reported slower growth in China in Q4 2014.

From the consumer point of view, Mintel has found that as many as 58% of ...

Gaming Consoles - US

“Content has always been important for video game consoles, as exclusive titles have long defined the legacies of brands like Nintendo. As consoles become increasingly more connected, multifunctional devices, the hardware is increasingly defined by the software and services it offers. Consoles are challenged to find ways of meeting these ...

ISAs - UK

Following the increase in the NISA annual allowance to £15,000 in 2014, the value of ISA subscriptions increased by 38% to reach £78.8 billion by the end of the 2014/15 tax year. Most of this increase came from cash deposits, which increased in value by 60% year-on-year ...

Kitchens and Kitchen Furniture - UK

“A livelier housing market is helping improve consumer confidence so that more people are moving house and more home owners are updating their properties. In 2014 sales of fitted kitchens grew by some 4.6% and 2015 is shaping up to be a year with similar growth.

Leisure Habits of Baby Boomers - UK

“Baby Boomers are a diverse group thanks to the wider choices they had in lifestyle growing up compared with previous generations. Younger Boomers are often at the height of their career, while the oldest are beyond retirement which means financially they are a complex group; some struggling to keep up ...

Marine Tourism - Europe

“While eight-in-ten consumers state that they purchase foods and/or beverages with free-from claims, two-thirds see them as a way for companies to charge more. This underscores the need for applicable manufacturers to invest in communicating the benefits that free-from products offer beyond placing labels on packaging, particularly around health ...

Gum, Mints and Breath Fresheners - US

Sugarless gum and regular gum sales have seen fairly steady declines since 2010, and are expected to continue doing so through 2020, with sugarless gum dropping an estimated 31.7% from 2010-20, and regular gum declining an estimated 20.2% during the same time frame. Factors such as smoking rate ...

Jewellery Retailing - UK

“The jewellery retail market follows a strong year in 2014 when falling precious metal prices and economic improvements boosted spending in the market. Young women stand out as being the biggest purchasers of jewellery for themselves, driven by their appetite for branded jewellery and the trend for layering and stacking ...

Leisure Centres and Swimming Pools - UK

“Public leisure centres and swimming pools have outperformed the sports participation market as a whole in sustaining the gains made around the London 2012 Olympics but now face a future in which deepening funding cuts will place huge pressure on budgets and push local authorities to adopt a more commercial ...

Leisure Time - China

“Chinese consumers’ expenditures on leisure products and activities are expected to increase by more than 10% annually towards 2019, driven by the increasing disposable income as well as multiple factors relating to people’s evolving lifestyles. This report aims to help leisure goods manufacturers as well as leisure service operators understand ...

Marketing Health to Men - US

"Tourism that is centred on the marine environment, chiefly in the form of rest and relaxation beach holidays, is the staple and most popular product area of the tourism industry. A measure of the sector's popularity can be gained from the saying "going to the beach", which has become synonymous ...

Marketing to Asian Moms - US

"Asian moms are a diverse group, originating from many countries, speaking many languages, and encompassing a wide range of economic and cultural backgrounds. On average though, they are highly educated, with high-household incomes and high expectations for their children's futures. This combination of traits makes Asian moms a desirable market ...

Marketing to Hispanic Moms - US

"Hispanic moms are devoted to their families and their homes. Their children are at the center of their worlds and they want to please them, having their preferences in mind when deciding what to buy. They want to support their children however they can and have high expectations about their ...

Marketing to Mums - UK

"The lives of British mothers have changed to a great extent over the past several decades, however marketing has been much slower to catch up to and acknowledge the changing realities of what it means to be a parent in modern Britain. Treating and addressing mothers as a homogenous group ...

Media Consumption Habits - UK

The rapid growth of short-form online video is impacting the media landscape; with Millennials in particular increasingly prioritising the mobile friendly content. As YouTube and other short-form platforms look to enter into the subscription sphere, long-form video platforms need to consider ways of adapting content to better suit all occasions ...

New Cars - US

The new car market is booming, fueled by pent-up demand as the economy continues its post-recession

"More than half of men consider themselves healthier today than they were a year ago, yet men remain most at risk for many health problems. When it comes to managing their health men rely on exercise, a positive mental attitude, and VMS (vitamin, mineral, or supplement). Motivation is the greatest ...

Marketing to Black Moms - US

"Black moms control the purse strings of the more than \$1 trillion buying power in the Black community. While moms may make the ultimate call on purchases, her children influence what she buys because she wants them to provide them with the things she may not have had while growing ...

Marketing to Moms - US

"Less pressure to settle down and have children early in life means more women are having kids on their own terms – which often means fewer children, later in life. While modern women have more choices than ever before, they also face greater expectations. Even though moms are increasingly working ...

Meat and Meat Substitutes - Ireland

"With prices of meat declining between 2014 and 2015, it has seen a slight decline in the total market value; with discounter retailers increasingly seeing more consumers buying meat from them."

– **Brian O'Connor, Senior Consumer Analyst**

Mother and Baby Products Retailing - China

"The mother and baby products retail market has not only grown quickly, but it has also quickly moved online. However, it is a market where trust in quality and advice are crucial. Consumers need to be convinced of product quality in-store before they go on to buy online.

Pet Food - UK

"The market looks to face pressure from the ageing population, growth in privately rented dwellings and

growth. The constant addition of new tech, safety, and convenience features are an additional market driver beckoning consumers into new cars. Leasing, too, has grown, as buyers look to get into new cars more ...

Retirement Planning: Pre-retirement - UK

"Online tools that provide projections of what pension funds may be worth based on current contributions by an expected retirement date will help savers to take a more goal-oriented approach to their retirement planning. Services like this could be the key to bringing retirement planning to the fore much earlier ...

The European Leisure Travel Industry - Europe

"The impact of the so-called 'sharing economy' on Europe's tourism industry is only in its beginning stages. One near certainty for the future of Europe's leisure tourism sector is that China will play an increasing role – both as a source market, and as a source of investment capital."

Thermal Insulation - UK

"Thermal insulation installers are increasingly adopting a multi measure approach, ranging from insulation through to heating, plumbing and renewables. Companies are also branching out from the retrofit market to different new build and commercial sectors. This strategy is designed to counteract volatility in the retro-fit sector caused by the stop-start ...

Vehicle Recovery - UK

"The market for vehicle recovery services is showing evidence that it has finally shrugged off the difficulties from the recent economic slowdown. Confidence is returning to both operators and consumers with this offering the potential for the sector to see a rejuvenation in the way that it delivers its services ...

Vitamins, Minerals and Supplements - US

concerns around pet obesity. However, the interest in pet food with premium features, such as 'human grade' ingredients and chilled pet food, suggest opportunities for NPD to fuel trading up."

– Douglas Faughnan ...

Spa, Salon and In-Store Treatments - UK

"The beauty treatment markets enjoyed strong growth in recent years, boosted by new destinations and growing interest; however sales were impacted by cheaper pop-up locations and at-home devices in 2014. Encouraging an older demographic to visit spas and salons with a health positioning, as well as tempting clients with high-tech ...

The Millennial Impact: Food Shopping Decisions - US

"Compared to older generations, Millennials exhibit a unique set of behaviors regarding their eating and food shopping habits. They prioritize health and freshness, have a foodie mentality at home and away, and shop for food across a variety of retail channels. Additionally, Millennials distrust large food manufacturers, citing a need ...

UK Retail Briefing - UK

This review looks at:

Vitamins and Supplements - UK

"Value sales of vitamins and mineral supplements flatlined in 2014, as reduced NPD (New Product Development) and a shift towards healthier diets impacted consumer interest in the market. Sales of demographically targeted vitamins continued to fare well, however, reflecting the consumer desire for personalisation."

Watches and Jewelry - US

Traditionally, sales in the vitamins, minerals, and supplements market have been driven by older consumers who are more engaged in the category. Now, brands are attempting to increase use among younger adults by focusing on short-term benefits, such as vitamins that address beauty concerns as well as provide energy or ...

Western Spirits - China

“Given the complexity of the drinking culture in China and the wide range of products within the Western spirits market, one-for-all marketing communication and product design are no longer fit for purpose. Further segmentation based on regional differences at city level is needed to triumph in the market.”

休闲生活 - China

“随着人们工作时间变得更长、更灵活，休闲运营商可能需要在产品和服务上锐意创新，以迎合其更繁忙的生活方式（如在工作的同时运动或放松）和休闲偏好。”

母婴产品零售 - China

“母婴产品零售市场增速惊人，尤其是线上渠道，但是与消费者积极互动构建信任仍是必须。消费者需要质量更好、性价比更高、咨询和培训更专业的产品和服务。这意味着，零售商不仅需要担负诚信服务保证人，而且还要肩负高质产品提供商的角色。这也是零售商扩大市场，包括深入低线城市的重要前提。”

西方烈酒 - China

“由于中国饮酒文化的复杂性以及西方烈酒市场上产品的多样性，万能型营销传播方式和产品设计已不再能满足需要。品牌需要在市级地区差异的基础上进一步进行市场细分，以在市场竞争中取胜。”

“While jewelry comprises the vast majority of purchases, watches should gain momentum as consumers’ interest in smartwatches builds. Fine jewelry has a slight edge over fashion/costume jewelry, and diamonds and gold continue to be favored. Although watches and jewelry preferences are highly personal, a focus on gifting should be ...

Yellow Fats and Edible Oils - UK

“Whilst there are pockets of growth in the yellow fats and edible oils market – such as butter and speciality oils – overall, the market is in poor health. Value and volume are predicted to fall in 2015 across spreads and cooking/olive oils, hastening the need for operators to ...

婴幼儿辅食 - China

“强调自然性和纯净性、充分利用有机成分的优势，以及拓展更多具有方便和辅助性质的食用场合都是提高中国市场婴幼儿辅食消费量的可行方式。”

– 刘欣琪，研究分析师

航空旅行 - China

“消费者对休闲旅游的需求日益增长，将进一步拉动民航业的发展。然而，由于在中国，假期数量较为有限，中国消费者更有可能是中频或低频旅客。但是，由于中频旅客基数庞大，因而值得作为航空公司重点培养的目标客户群。因此，航空公司需要提高常旅客计划对于这类群体的吸引力，继而提高消费者的忠实度。航空公司需要在常旅客计划奖励机制以及会员如何使用积分或消费者积分方式方面锐意创新。”

– 李泷铃，高级研究分析师

香水 - China

“尽管香水的使用率保持高位，但消费者在使用频率和香水的认知方面均略显不足。为了推动未来的发展，品牌可以通过积极的渠道扩张，加大对送礼市场的投资力度，特别针对百货商店和机场免税店的扩张，尤为如此。”