

August 2019

## Airlines - UK

"Whilst most travellers choose to fly economy, there are opportunities for airlines to upsell by offering more flexibility when it comes to selecting add-ons and services considered to be more premium."

- **Marloes de Vries, Travel Analyst**

## Annuities and Income Drawdown - UK

"The changes brought about by Pension Freedoms legislation have been so significant that regulators and providers are still adjusting to them just over five years since first being announced in the 2014 Budget. Although there have been few major innovations in the market, product development activity could increase in the ...

## Attitudes to Advertising - Ireland

"Irish consumers think that it is important to see more diversity in the actors and models used in advertising. Better visibility of under-represented communities in their advertising will help brands to create more inclusive promotional campaigns that better reflect and enable them to connect with an increasingly diverse audience." ...

## Attitudes towards Sports Nutrition - UK

"The sports nutrition market is going through a major transformation, muscling its way out of its athlete-focused niche into the mainstream. A more accessible and widely resonating 'active lifestyle' positioning, together with product innovation and wider availability through mainstream channels, has been at the heart of this shift. There are ...

## Bodycare - China

"Bodycare is less likely to be considered as essential when compared to other beauty and personal care categories, therefore this market relies on product innovations to draw consumer attention and drive trial and usage. Incorporating added benefits, ingredients or

## America's Pet Owners - US

"Americans are looking at the products and services made for them and asking: 'why don't they have this for my pet?' From fresh food delivery to anti-anxiety offerings, products for pets are looking more like products for people every day. This is one of the major factors driving this ...

## Approach to Health Management - US

"Consumer spending on health-related services and products increased significantly from 2013-18, and a slowdown is nowhere in sight. Health management is universal, with many people placing significant pressure on medical professionals to guide their health and wellbeing through product recommendations and ailment and wellbeing care. With the foreseen doctor shortage ...

## Attitudes towards Low- and Non-alcoholic Drink - UK

"The alcohol reduction trend looks to be here to stay. Encouraging moderation is on the government agenda, and cutting back on alcohol is also seen by consumers as offering various benefits, increasing its appeal. Crucially, the quality of the product is improving, meaning that switching to a low- or no-alcohol ...

## Black Haircare - US

"The Black haircare market has evolved into regimen maintenance and styling, with chemical product use concentrated among the few who will always be customers. Having chemical-free hair is no longer the big story, but rather how Black consumers' beliefs and perceptions of their hair impacts their personal maintenance, style choices ...

## Bodycare and Deodorant - Hispanics - US

"Bodycare and deodorant are mature categories. Hispanics offer opportunities in personal care, as they use bodycare and deodorant at a similar rate as



formats that are typically seen in facial skincare into bodycare can ...

## Brand Overview - Finance - UK

“Times are changing in the financial services sector, and any companies that are relying on a heritage brand and consumers’ traditional inertia when it comes to switching providers could be caught out. Challenger brands are disrupting the market, and younger consumers are looking differently at the role of the financial ...

## Burger and Chicken Restaurants - UK

“With more consumers rejecting single-use plastics and pledging to live more sustainably, fast-food brands and governments must draw up plans to eliminate single-use plastics, use more recycled plastic in food and drink packaging and work on more effective recycling.”

## Cloud Computing - UK

“Cloud computing is a fast growing market. The corporate need to keep pace with the latest technology combined with the advantages it offers at times of economic disruption mean that the market is potentially even benefitting from the uncertainties caused by Brexit.”

– Terry Leggett, Senior Analyst

## Consumer Spending Priorities - China

“Although the majority are still in a good financial situation, uncertainties in the economy have rung alarm bells. Consumers have become more conservative in their financial outlook, and savings sentiment has also gone up. Instead of being blindly driven by promotions, more consumers are now buying what they need. When ...

## Credit Card Rewards - US

consumers overall and overindex for using specialized products. Top purchase drivers indicate the need for brands to be readily available with supporting materials at stores with calls ...

## Breakfast Cereals - UK

“Sugar remains the key challenge faced by the category. While the vast majority of users would like to see the sugar content reduced in their favourite breakfast cereals, reformulation is not without risk. Steps to get consumers actively involved in reformulation hold potential to reduce the risk of backlash.

The ...

## Car Purchasing Process - Canada

“The test drive remains essential in the car buying process but many are turning to online research, including reviews submitted by consumers as well as professionals in the field. Most consumers are performing research on incentives, car performance and car features, making them well informed before they visit a dealership ...

## Coffee Shops - Emerging Coffee Culture - Ireland

“Coffee culture in Ireland continues to grow as consumers become better educated in brewing techniques, sourcing origins and quality coffee which has resulted in coffee shops and cafés being one of the fastest growing foodservice segments in Ireland – a trend which is set to continue in 2019 and onwards ...

## Consumers and the Economic Outlook - UK

“It is a confusing time for the British public. The new Government has been unable to agree a Brexit deal with the EU and Parliament has passed legislation obliging the Prime Minister to request a further extension if he cannot get one. Despite this, Boris Johnson has maintained his stance ...

## Credit Cards - UK

"The credit card industry is a well-established one, and a handful of top players dominate the industry – in terms of both market share and assets. The majority of consumers already own a credit card, and most who use them frequently own several. As a result, competition for new customers ...

## Current Accounts - Ireland

"For the first time since Mintel began examining Irish consumers' preferred channels for various banking activities and transactions, the digital channels - online banking and mobile banking - trump branches for every activity. The coming years will likely see branches further edged out of transactions and everyday banking activities, as they increasingly ...

## Digestive Health - US

"The digestive health market has exceeded expectations, with US retail sales estimated to reach more than \$5.1 billion in 2019. Previously, the category was supported by Rx-to-OTC conversions in the antacid segment, boosting sales dramatically in 2015. Since then, growth had stabilized and was predicted to flat line. However ...

## Egypt Outbound - Egypt

"Egypt's outbound market is underdeveloped compared to its inbound market. In a country of almost 1 billion, less than 2% of Egyptians travelled abroad in 2017. Foreign travel is a luxury for most, afforded by only the most wealthy and upper-middle-class consumers. Economic reforms imposed in 2016 have only exacerbated ...

## European Retail Briefing - Europe

**This month's European Retail Briefing includes:**

## Family Entertainment - US

"People continue to use their credit cards for spending, making the most of benefits and extra protection. They are hesitant about taking on unnecessary debt and are keen to repay as soon as possible. Providers are rethinking their proposition, to meet the needs of both transactors and borrowers amid the ...

## Dentistry - UK

"Although growth is forecast to slow over the next five years, the private sector is anticipated to have greater growth opportunities than NHS dentistry since the NHS faces a considerable challenge in providing high quality healthcare amid rapid demographic changes and constrained public spending."

– Lewis Cone, Senior B2B ...

## Digital Advertising - US

"Digital advertising is a \$125 billion industry and is estimated to account for more than half of total advertising spending following robust growth across all segments including banner, video and search. Growth is expected to continue, albeit at a slightly slower rate than in years past, indicating that the digital ...

## Energy Industry - UK

"Battery technology and other forms of electricity storage solve the problem of renewables' intermittent supply, and the technology is widely expected to have a significant role in the UK's future energy system, allowing for an increased role for renewables, more flexibility and greater decentralisation.

The energy storage sector is already ...

## Facial Skincare - China

"The usage rate of basic facial skincare products has increased compared to 2017, with more uptrends seen in facial cleanser and sun care products. Although they are not high-priced products like serums, premiumisation opportunities exist for facial cleanser by offering more advanced benefits like anti-aging for mature women and soothing for ...

## Fashion & Sustainability - UK

"Parents look to balance screen time with outside play to keep themselves sane and their kids entertained. They are looking to share familiar experiences with their kids in new and interesting ways as the entertainment market gets increasingly more diverse. Entertainment options that can keep parents engaged amidst a sea ...

## Fragrances - UK

"The market is estimated to decline by 0.8% to £1.48 billion in 2019 before a longer-term period of growth as consumers trade up to more sophisticated formats. Brands may need to consider ethical values, ingredient transparency or more unique benefits to differentiate from competitors and command a price ...

## Gifting Foods - China

"Premium fruit, nuts, and dairy drinks have gained popularity in the gifting food/drink industry. There are fewer buyers choosing nuts and yogurt as gifts compared to fruit and milk. One way of increasing purchase is offering bundle deals of nuts and yogurt. In addition, nuts businesses could target niche ...

## Innovative Retailing - China

"The application of technology in retail can only prosper when consumers' needs are kept in mind. Consumers crave entertaining and exciting experiences and want to make their purchasing decisions as convenient as possible. Pop-up stores are an effective tool to strengthen companies' sales and marketing capabilities. Mini karaoke booths, vending ...

## Maquiagem e Esmalte para Unhas - Brazil

"A categoria de maquiagem no Brasil tem alguns desafios a enfrentar. Poucas marcas ainda falam sobre inclusão social e individualidade e desenvolvem produtos voltados para mulheres mais velhas. Além disso, produtos como delineadores, blushes e iluminadores são mais usados somente em ocasiões especiais. Há oportunidades de trabalhar com inovações em ...

## Music Concerts and Festivals - UK

"Press headlines and TV documentaries have helped to raise consumer awareness regarding how harmful certain shopping habits can be to the environment. Consumers want to see fashion retailers doing more to help them shop more ethically and sustainably. However, with so many conflicting messages regarding what is, and what is ...

## Fruit - US

"The fruit category is seeing slow growth, with a modest 1.4% increase from 2018 to reach \$42.2 billion in sales in 2019. The fresh fruit segment dominates fruit sales, and its success positively impacts category sales overall but steals market share away from center-of-store segments such as frozen ...

## How Amazon Continues to Raise the Bar - US

"Amazon has raised the bar for retailers in ways big and small. Indeed, more than half of consumers agree that Amazon excels over other companies when it comes to making it easy to find what you want; offering a broad selection of products and brands; and creating an easy to ...

## Luxury Goods Retail - International

"The global luxury goods market resisted some major headwinds in 2018, with ongoing political and economic uncertainty in a number of the key markets, as well as a decline in the population of High Net Worth Individuals. In spite of these challenges, consumer demand has remained robust and the leading ...

## Marketing to Millennials - Canada

"At 25-42, most Millennials have aged out of the stereotypical early 20's lazy and entitled image that has defined them for so long. Millennials are financially minded and transitioning into adulthood with more than half now responsible for others as spouses and parents. The transition into adulthood is leaving the ...

## Non-alcoholic Drinks Consumption Habits - Brazil

“The UK music concerts and festivals market continues to grow steadily, fuelled by more events, investment from the recorded music sector and economic uncertainty prompting some Brits to substitute overseas trips in favour of UK-based leisure activities. In an increasingly crowded market, operators need to utilise elements of the entire ...

## On-premise Restaurant Technology - US

"On-premise restaurant technology such as kiosks and tablets are offering operators multifaceted solutions to growing labor challenges and consumer demand for speedy foodservice; however, most consumers are still not very accepting of fully-automated restaurant concepts. Operators should lean into consumer-friendly tech solutions such as pre-ordering options and tableside payments for ...

## Prepared Meals - Frozen and Refrigerated - Canada

"While the majority of Canadians eat pre-packaged meals and Mintel forecasts growth in the segment, there are evident and nuanced differences in what motivates different consumers to turn to the category. As the broader competitive landscape continues to intensify, this Report looks to identify and understand the drivers for use ...

## Recruitment - UK

“The recruitment industry has been set back by Brexit uncertainty and a weakening global economy. These factors have reduced the rate of growth, but also increased demand for flexible temporary labour. Combined with the ubiquity of computing and the internet, a continuing influx of new SMEs are driving competition and ...

## Sexual Health - UK

“Messages around the importance of safe sex have quietened in recent years, in tandem with reduced outlay on promoting condoms, resulting in value sales of condoms – the largest segment – continuing to slide – and pulling down overall category value as a result. Society has become more open about ...

“Several categories of non-alcoholic drinks have faced a drop in consumption by Brazilians, but at the same time, drinks that naturally deliver functional benefits have gained space, such as non-alcoholic fermented drinks and coffee. Adding functional benefits to non-alcoholic drinks seems to be a reliable strategy to keep consumers attracted ...

## Pet Insurance - UK

“Following a period of significant growth, the pet insurance market stalled in 2018. Despite this, a large number of pets remain uninsured, and there is room for greater uptake of cover in the near future. Developments related to wearable technology and how this can be used to track a pet’s ...

## Ready Meals - Brazil

“To boost sales and consumption frequency in the ready meals category, brands and companies need to diversify the options of products offered. In addition to healthier alternatives made with ingredients well-known by consumers, it is essential to offer a greater variety of flavors, local and international and convenient formats, which ...

## Savoury Spreads & Dips - UK

“Sales of dips have grown strongly in recent years, but further opportunities exist for pairing dips with snacks, including pairings positioned for eating with specific alcoholic drinks, as well as encouraging higher usage with main meals. In ready-made sandwich fillers more premium and healthier options, including more products with high-protein ...

## Shopping for Household Care Products - US

"The routine nature of shopping for household care products remains a challenge for category competitors, with cost, convenience and brand still dictating purchases. Yet younger shoppers express a willingness to try new products, particularly those that meet their natural and eco-friendly interests. While the majority of household care purchases still ...

## Shopping for Household Care Products Online - US

"eCommerce in household care has developed slowly compared to most other CPG categories, but that's about to change. The consumer demand to buy household products online is growing, while top brands and online retailers are becoming more proactive in developing packaging better suited for shipping.

Parallel to this, there has ...

## Sports Betting - UK

"The balance of power in the sports betting market tilted further towards its online segment in 2018/19 but in-person activity will remain an important influence on player volumes and the future shape of the sportsbook offer."

## Sweet & Nut Spreads - UK

"Further innovation in no added and reduced-sugar products is essential in view of government reformulation targets and widespread consumer concerns over sugar. Where a lower sugar content results in a less sweet taste and more sophisticated flavour profile, this could also help companies retain users in the category for longer ...

## Televisions - UK

"Through declining prices and the build-up to major sporting events, take-up of 4K Ultra HD TVs has grown in the last year. This is set to continue as people show desire to upgrade to higher resolution pictures and larger screens. As picture resolution improves, it is vital brands offer equally ...

## The Generation Z BPC Consumer - UK

"Generation Z are defining their own parameters of beauty and are not looking for external validations for their appearance. Self-expression is essential to this group, who are already involved in their BPC routines at a young age and buying their own products. Whilst much is speculated about the influence of ...

## Sporting Goods Retail - US

"People are buying sporting goods. They're also prioritizing their health to a greater degree, which means more exercising and participation in sports and fitness; this should fuel demand for sporting goods in the future. However, more often than not, people are buying sporting goods at places other than stores that ...

## Sunscreen Products - China

"The market is experiencing fast growth and consumers are becoming savvier and their needs are evolving from high-index SPF/PA to strong protection results delivered by advanced technology and ingredients. Future opportunity lies in meeting consumers' trade-up demand for safer products boasting natural ingredients and ease of removal, offering comprehensive ...

## Tea and RTD Teas - US

"The \$8.7 billion tea market continues to grow at a slow rate driven by smaller RTD brands and trendy kombucha. Though tea faces stiff competition from other beverages, and RTDs are under scrutiny due to their sugar content, tea is well suited to address the needs of today's consumers ...

## Tendências em Alimentação Saudável - Brazil

"Para além do bem-estar físico, a saúde mental e emocional e o envelhecimento saudável também já são grandes motivações para a compra de alimentos e bebidas saudáveis. As marcas precisam ampliar a oferta de produtos que tragam benefícios para esses fins, tornando-os mais democráticos, visto que brasileiros de todas as ...

## The Luxury Consumer - US

"The concept of luxury is evolving beyond fine jewelry and formalwear. For today's consumers, easy, enjoyable, even interactive experiences can be luxuries as well. For younger, male consumers, however, recognizable brand names are still an important part of signaling a luxurious lifestyle. Designer brands must be able to interpret a ...



## Themed Travelling - China

“With consumers motivated by personal hobbies to try themed travel, customisation is part of the ‘DNA’ of this product. This means well-design themed travel can serve as an ingredient for customised travel on one hand, but it is difficult for themed travel to enjoy economy of scale on the other ...

## Tourism Investment in South East Asia - International

“The past decade has witnessed a dramatic upsurge in inbound, outbound and domestic travel across the ten countries of South East Asia. In response, each nation has identified its own investment priorities to expand tourism and create new revenues and job opportunities.”

- **Jessica Kelly, Senior Tourism Analyst**

## Travel and Tourism - Jordan

“With desert landscapes alongside natural and man-made wonders, this compact country lying at the crossroads of the Middle East packs a big cultural tourism punch. As a safe haven in a region of conflict, Jordan is enticing tourists by opening up the skies, and developing new niche segments to encourage ...

## Travel and Tourism - Senegal

“Senegal’s international tourism market is in a growth phase following improved strategic efforts and investment by the Senegalese government. Arrivals rose 28% between 2013 and 2017 despite the negative effect of the Ebola crisis in West Africa, reaching 1.37 million visitors in 2017.”

– **Jessica Kelly, Senior Tourism ...**

## Travel and Tourism - Zimbabwe

“There is growing awareness in Zimbabwe that tourism – as an industry with the potential to stimulate investment, increase exports and generate employment – can make an important contribution to the country’s economic recovery and its future financial health. In the summer of 2017 the former tourism and hospitality industry ...

## Vegetables - US

## Thermal Insulation - UK

“Growth in demand for retro-fit building thermal insulation measures is expected to remain moderate over the next five years, unless the government provides new incentives to boost take-up. The recently announced £5 million Green Home Finance Innovation Fund aimed at accelerating the financial sector’s offering of green mortgages is hoped ...

## Travel and Tourism - Ghana

“In 2018, tourist arrivals from Nigeria accounted for 10% of the total inbound market – an increase attributed, in part, to an advertising campaign marketing Ghana as a weekend getaway. Nigeria has a growing middle class and like many other people with the time and money to travel, they take ...

## Travel and Tourism - Lebanon

“Lebanon has many strengths as a tourist destination. A meeting point between east and west, it is known for its incredibly diverse culture and rich history, vibrant art and music scene, along with culinary excellence and numerous architectural wonders. Tourism is a major economic sector and now the country is ...

## Travel and Tourism - Zambia

“With abundant iconic African wildlife living in a spectacular, watery landscape, Zambia has an enviable reputation as a good-value destination compared to its southern African nations; some say its flagship national park, South Luangwa, is one of the continent’s very best. Consequently, the country is taking big strides to take ...

## UK Retail Briefing - UK

**This month's UK Retail briefing includes:**

## Video Games and Consoles - UK

"Sales of vegetables continue to grow conservatively but steadily, with growth in the frozen and fresh segments mitigated by declines among shelf-stable varieties. Consumers appear interested in adding more vegetables to their diet, but with novel concepts in other categories incorporating vegetables or even using them as a base, vegetables ...

## Women's Clothing - US

"Most women are buying clothes and many do so frequently. With numerous options of where and how to shop, retailers are pressured to evaluate their assortments and, just as importantly, the way they engage with shoppers. More diverse and independent women shopping the category means more preferences and behaviors retailers ...

## 主题旅行 - China

"由于消费者受个人兴趣爱好驱动而尝试主题旅游，定制化已成为这类旅游产品的核心DNA。这意味着，设计精妙的主题旅游可以作为定制旅游的“原材料”，但另一方面，主题旅游很难实现规模经济效应。主题旅游的创新重点可以从新路线、新目的地延伸至大众兴趣类活动，向游客售卖体验。主题旅游如何打造新的旅游体验取决于旅游产品具体选用的主题。享受慢节奏的生活方式更有助于吸引消费者尝试健康养生主题旅游，而非改善睡眠质量。自驾游产品可以利用不同的汽车品牌或车型代表的生活方式让消费者在旅途中享受新奇的生活方式。”

— 赵凌波，研究分析师

## 身体护理用品 - China

"比起其他美容及个人护理品类，消费者不太认为身体护理是必需品，因此该市场依赖于产品创新，以吸引消费者的注意力，带动尝试和使用。将面部护肤品中的常见功效、成分或质地引入到身体护理中，能帮助品牌提升参与度和销售。”

## 防晒产品 - China

"防晒品市场正在飞速发展，并且消费者越来越精明，他们的需求正在从高SPF/PA系数，逐渐演变为由先进科技和高级成分带来的强效防晒效果。对于企业来说，未来的发展机遇在于：满足消费者的升级需求，需求包括宣称成分天然且容易清洁的更安全的产品；以及在提供适合不同场合的SPF/PA值之外，还能提供全面的强效防护；并开发细分产品线，以适应在任何场合随时随地的使用。”

"The video games and console market is estimated to continue its decline in 2019 and much of 2020. However, the launches of the next Xbox and possibly PlayStation towards the end of next year are set to significantly boost the market from that point on. Another growing trend in the ...

## Yogurt - China

"Generally speaking, consumers in China regard yogurt more as a functional food. Although ambient yogurt is growing faster, it faces the dilemma of finding a suitable positioning, as consumers will realise its limitations in terms of functionality; as for chilled yogurt, to distinguish from ambient yogurt, a high added-value image ...

## 创新零售形式 - China

"只有时刻谨记消费者的需求，零售行业的科技应用才能获得蓬勃发展。消费者渴望有趣刺激的体验，希望购买决策尽可能简单方便。快闪店是公司提高销售业绩、加强营销能力的有效工具。如果迷你KTV、自动售货机、“幸运盒子/福袋”和迷你健身仓可以识别消费者细分群体，如已婚已育群体和二、三线城市居民，这些就能成为行之有效的零售形式。除了重点关注社区人口统计数据 and 购物习惯，无人商店也应该始终将传统便利店视为主要竞争对手；无人商店的科技应用也可以在有效解决消费者问题上进一步加强。”

## 酸奶 - China

"总体来说，中国消费者更多的把酸奶看作功能性食品。尽管常温酸奶增长更快，但其处境尴尬，需找到更加合适的定位，因为消费者将会意识到其功能的局限性；而冷藏酸奶要想和常温酸奶差异化竞争，则需通过具体的功效，打造高附加值的形象。”

— 阿芳，研究分析师

## 面部护肤品 - China

"面部基础护肤品的使用率比2017年时有所上升，其中洁面产品和面部防晒的使用率增幅更大。尽管这些不是精华等高价位产品，但洁面产品仍有着高端化的契机，洁面产品可提供更多高阶功效，例如为成熟女性提供抗衰老功效和为年轻女性提供舒缓功效。”

— 蒋亚利，高级研究分析师





– 尹昱力，初级研究分析师

## 馈赠食品 - China

“高档水果、坚果和乳制品饮料在馈赠食品饮料行业中备受欢迎。与水果和牛奶相比，较少消费者选择坚果和酸奶作为赠礼。提高购买的方法之一是推出捆绑组合。此外，坚果企业可以瞄准保健品和代餐等小众市场。而且，三线城市是发展馈赠坚果和酸奶的潜力市场。”