

January 2017

Accessorising the Home - UK

"Choice of home accessories can be a way of expressing emotions, building fond memories into a home and adding personality to a room. Shoppers will look for their perfect accessory – just right – explaining why so many seek something a little out of the ordinary. But price matters too ...

Attitudes toward Healthy Eating - Canada

"Canadians actively target healthy eating all or most of the time (76%). Healthy eating behaviours are seen to be a balancing act of both subtractive behaviours (ie cutting out 'bad' food qualities) and supplemental ones, where effort is made to include nutritious foods. Though highly interested in foods with health ...

B2B Insurance - UK

"The rapid introduction of new technologies, such as telematics, and the growing importance of data and analytics, have demonstrated to insurance companies just how quickly the market can be disrupted by new ideas or non-traditional competitors. As insurers seek to build partnerships and alliances in the 'insurtech' sector, they must ...

Beauty Retailing - Brazil

"Beauty and personal care (BPC) retailing in Brazil is a unique sector, market by multichannel sales and by a wide range of product offering. Actions in purchasing channels with the aim to make consumers more loyal are essential in a market characterized by fierce competition. Pharmacies in Brazil have been ...

Beauty Retailing - France

"Growth in spending on personal care in France has been sluggish, but the specialist retailers have been growing strongly. This is in no small part due to the dynamism of market leader Sephora, whose accessible stores and digital innovations are leading the way, but also down to the expansion of ...

Air Care - China

"The mixed segment performance in air care is a reflection of changes in consumer demand in the category. While pure odour eliminating air fresheners will remain as the bulk of the market, future growth drivers are products that go beyond and address indoor air pollution or improve the mental wellbeing ...

Attitudes towards Sugar & Sweeteners - UK

"Facing increased pressure from multiple sides to cut sugar, both retailers and food and drink manufacturers will need to demonstrate their commitment to improving public health. While the widespread suspicions of artificial sweeteners present a significant challenge, consumers' openness to alternative sugar substitutes and to less sweet-tasting products also gives ...

Back to School Shopping - US

With planned BTS (back-to-school) shopping reaching almost \$76 billion in 2016, the season is a vital opportunity for retailers to connect with young shoppers, build relationships, and introduce new products. While challenges to the BTS market include limited growth in family household incomes and stagnant school enrollment, the vast majority ...

Beauty Retailing - Europe

Beauty Retailing – Europe, January 2017 provides detailed coverage of the beauty retail sectors in the five major Western European markets: the UK, France, Germany, Italy and Spain. The data in its entirety is contained in the five-country report, which gives a full overview of beauty retailing in these markets ...

Beauty Retailing - Germany

"The internet is a critical part of beauty shopping as consumers use social media for inspiration and the latest trends. But sales online are low and stores remain irreplaceable for allowing consumers to interact with products. Recent expansion by some of the leading players means stores are now more conveniently ...

Beauty Retailing - Italy

“The Italian beauty market is continuing to perform well. Despite fluctuating levels of growth in consumer spending, the leading specialists have continued to increase retail sales – strengthening their position in the market and stealing consumer spending away from the grocers and department stores. Looking ahead, the leading specialist Acqua ...

Beauty Retailing - UK

“The beauty retail market is experiencing slowing growth as consumers are spending less, notably on basic products within the personal care segment. Stores remain vital to the beauty purchase process; and by investing in new services and technology, retailers are able to add value to their offering that cannot be ...

Beverage Packaging Trends: Spotlight on Alcoholic Beverage Packaging - US

61% of US adults aged 22+ purchase alcohol for off-premise consumption. While dollar sales in most alcohol segments are on the rise, securing appeal in a competitive marketplace requires aligning with consumer preferences. Two thirds of alcohol buyers indicate paying attention to package format, and 64% pay attention to label ...

Bottled Water - US

“The bottled water market saw sales increase from 2015-16. Healthy living trends, consumer interest in hydration, as well as the development of new flavored, sparkling, and enhanced bottled water variations have been key drivers. Future growth will hinge on capitalizing on consumer interest in added benefits to bottled water, addressing ...

Center of Store - US

“The shelf-stable and frozen and shelf-stable packaged food categories of the center store have generated only minimal growth in recent years as shoppers have gravitated to perimeter departments offering foods they perceive to be fresher, healthier, and tastier. While center-store brands are making changes to their products to align with ...

Beauty Retailing - Spain

“Spain is emerging from its prolonged recession and consumers are recovering their confidence. They are showing signs of trading up and are interested in the environmental credentials of beauty products. Consumer research for this report reveals a trend towards shopping at the specialists and a recovery in interest in innovative ...

Bebidas Mistas - Brazil

“O consumidor brasileiro vem buscando opções mais saudáveis e o mercado vem respondendo bem com as bebidas mistas. Essa nova categoria consegue aportar o melhor dos mundos de cada bebida em um só produto, como combinar o gás do refrigerante com a naturalidade dos sucos, ou os benefícios funcionais do ...

Black Consumers' Lifestyles and Entertainment - US

“Black consumers are optimistic about life in general, their purpose in life, and how they spend their time. They rely on family and faith to keep them grounded and emotionally fulfilled while living out their passions. Their passions and the trends they follow tend to collide in their leisure time ...

Casual Dining - China

“Although the casual dining market is enjoying healthy growth, the market remains fragmented – and is expected to be even more so as more new brands are created featuring unique themes. To differentiate from others, brands should define a focus that is relevant and be able to provide unique experience ...

Children's Online Spending Habits - UK

“Some 61% of children spend more money online on digital goods than anything else, driven largely by boys’ gaming purchases. That said, children still demonstrate a general preference for physical stores compared to making online purchases for physical items.”

– Mark Flowers, Research Analyst - Consumer Technology

Cider - UK

"Interest in authenticity can be further mined by brands by providing more information about the ingredients and processes used by their skilled cider makers. Importantly, it needs to be spelled out how these factors contribute to products' signature taste profile, highlighting the flavour as inimitable."

Computer Security - UK

"Computer security continues to be of paramount importance. National defence is increasingly moving to the potential issue of cyber attacks, while commercial companies face the twin challenges of more connected devices (both owned and customers connecting to their systems) and the greater sophistication of cyber crime. Against such a background ...

Consumers, Saving and Investing - UK

"The convenience of being able to easily access savings and investments online is now just as important as fees charged and rates paid, which means that providers who develop the most effective finance management apps and dashboards will be less vulnerable to competitor price moves."

Paul Davies, Senior Financial ...

Cooking Sauces and Pasta Sauces - UK

"As health concerns remain key reasons to limit cooking and pasta sauce intake, brands and retailers face ongoing pressure to improve and highlight their credentials. Intense competition from scratch cooking poses another continuing threat to the market; NPD in formats positioned as offering convenient, time-saving aids to scratch cooking remains ...

Crisps, Savoury Snacks and Nuts - UK

"Health concerns are prompting users to cut back: 42% say they are limiting the amount of crisp/crisp-style snacks they are buying compared to a year prior. Offering some good news for the market in this context

Civil Engineering - UK

"The major projects set to drive civil engineering construction output over the next five years include Crossrail, Hinkley Point C, Thames Tideway Tunnel, major road schemes, Network Rail's modernisation programme, and, once fully approved, HS2. However, shortages in skilled labour and construction materials capacity will pose challenges to the industry ...

Consumer Snacking Trends - China

"Globally, meat-based snacks have moved into the spotlight in the last year owing to consumers' high interests in protein-rich snacks. The category has been a part of traditional Chinese snacks for centuries but has rarely been positioned as a high-protein snack. Featuring its protein level and making them more convenient ...

Contract Catering - UK

"Austerity measures have meant continued strong pressure on public sector bodies to cut spending. While this has led to some outsourcing in the contract catering sector, it has also led to intense price competition and even reductions in some existing contracts. This is particularly true in sectors that have felt ...

Crackers - US

"The cracker category continued to post modest growth in 2016, but was up only 0.8% from the same time period in 2015. The category benefitted from increased consumer activity in snacking and from its existing reputation for being a healthy and easy to enjoy snack. Snacking innovation from a ...

DIY Auto Maintenance - US

"This Report will focus on the DIY (do-it-yourself) automotive sector, and will discuss consumers' DIY history, overall aptitude, and knowledge of specific automotive maintenance, repairs, and customizations, as well as motivations and attitudes toward DIY automotive work."

is that 34% of users are buying more baked varieties than before.

This ...

Electrical Wholesale - UK

"A buoyant new construction market and continued repair and maintenance demand were facilitating sales growth in the electrical wholesale market after considerable disruption during the recession. However, the commodity nature of many products, intense industry competition, and the fact that installations typically fall at the end of construction contracts all ...

Estilo de Vida dos Millennials - Brazil

"A geração dos millennials ainda está atrás em termos de sustentabilidade e hábitos alimentares saudáveis, em comparação às gerações anteriores, já que as pessoas tendem a adotar hábitos mais saudáveis e sustentáveis à medida que envelhecem. Há espaço para as marcas ajudarem os millennials, principalmente os mais maduros, a adotarem ...

European Retail Briefing - Europe

This month ERB includes:

Haircare - China

"International brands are continuously investing in consumer education while Chinese brands are making less effort in this aspect. But education is what Chinese consumers need as they are not as sophisticated as manufacturers think. The popularity of imported products from South Korea and Japan also demonstrates the importance of telling ...

Hispanic Lifestyles and Entertainment - US

Estate Agents - UK

"The UK estate agents market is highly fragmented, shaped by a wealth of regional and national operators. The marketplace is also highly fluid and dynamic, subject to significant changes in line with factors such as the rise of online, consumer behaviour and the national economy."

– **Marco Amasanti, B2B ...**

Ethnic Restaurants and Takeaways - UK

"It is becoming more important to provide additional reasons to visit, as ethnic restaurants face mounting pressures on recruitment, rising costs and weakening consumer confidence. Casual dining concepts that focus on communicating good food hygiene and offering leisure experiences should support growth but stand to impact on independent players." ...

Full Service Restaurant Trends - US

2016 for FSRs (full service restaurants) was characterized by rising prices, same-store traffic decreases, competition from LSRs (limited service restaurants), and the bankruptcy of some high-profile restaurant groups. Despite these challenges, FSRs continue to shape what and even how consumers eat. The future may not be clear for many large ...

Handbags - UK

"Retailers and designer brands need to adjust to a new reality where handbags are no longer a sure-fire revenue generator. However, focusing on newness, unique designs and customisable bags provides a way to encourage higher levels of purchasing."

– **Tamara Sender, Senior Fashion Analyst**

Holiday Review - UK

"Hispanics feel life is to be enjoyed, although most agree they are generally simple people who don't need much to be satisfied. In many cases, larger household sizes and a lower median household income forces Hispanics to prioritize their expenses, particularly those that are discretionary, such as leisure and entertainment ...

Home Electronics (Video/Audio) - Canada

"Audio and video home electronics manufacturers and brands operating in Canada are facing a changing environment of evolving preferences and consumer demand. New televisions are pushing the boundaries of screen sizes and resolutions, and these attributes do capture consumer interest. However, some segments have struggled to maintain relevancy in light ...

Household Care Packaging Trends - US

"Packaging and design continue to become more important in mature and highly functional household care product categories. Packaging serves as a way to stand out among competitors as well as communicate product value and information. Packaging is also a key component in shaping a consumer's shopping and user experience, which ...

Insurance Claims and Servicing - Canada

"Increasing the adoption of usage-based insurance will mean convincing customers to trade in their privacy to obtain benefits such as better rates and a smoother driving experience."

Managing Your Health - US

"The US continues to experience significant growth among the older population, along with an increasing life expectancy, growing the demand for products and services to assist health-engaged consumers. In order to help consumers overcome barriers to living a healthy lifestyle, it will be essential to tap into their emotional motivators ...

Mixed Beverages - Brazil

"It is still unclear how Brexit negotiations will affect the travel market. However, Mintel's consumer research finds that a sizeable proportion of holidaymakers say they plan to take more trips in 2017 than they did in 2016. While this is positive news, our research also finds that consumers will adopt ...

Home Hair Color - US

"Home hair color sales have remained flat, as preferences for natural looks, concerns over damage, and ombre styles, which have made roots less taboo, have all placed downward pressure on the market. Despite challenges, opportunities exist to reinvigorate sales, exemplified by positive men's hair color sales, suggesting that expanded availability ...

Instant Noodles - China

"The instant noodle category is facing great challenges as demographic changes are reshaping the main consumer group of the category. Manufacturers should take action and respond to consumers' upgraded needs to stay competitive. A multi-brand strategy and clear positioning will enable more precise targeting and strengthen brand loyalty."

— ...

Lifestyles of Young Families - US

"Work-life balance is something that all families strive for, but it is a particular challenge for families with kids under the age of 12. With young kids in the household, parents spend a lot of hands-on time making meals, helping with homework, and coordinating activities. As kids gain independence and ...

Marketing to Millennials - Brazil

"Sustainability and healthy eating habits are areas in which Millennials still lag behind other previous generations, as people tend to adopt more sustainable and healthier habits as they age. There is room for brands to tap in to help Millennials adopt healthier and sustainable habits, especially older Millennials."

— ...

Mobile Network Providers - UK

"Brazilian consumers are looking for healthier options of non-alcoholic drinks, and the market has been meeting this demand with mixed beverages. This new category can bring together the best of different segments into one product, for example, combining the sparkling element of CSDs with the natural claims of fruit juices ...

Personal Loans - Ireland

"After a challenging period during and immediately following the recession, economic recovery and a significant upturn in consumer confidence have brought some upward momentum into the loans market in Ireland. It remains to be seen, however, how the UK's departure from the EU and the shift in policy from ...

Retail Banks - China

"Consumer experience now has a much broader definition than solely good customer service attitude. To be outstanding, retail banks need to differentiate on aspects like professionalism and efficiency. It is worth noticing that the benchmark used by consumers is their experience in different categories, so ensuring the performance is competitive ...

Seasonal Dining Trends - US

"Seasonal is a term with a clearly defined meaning associated with it; however, a more subjective and emotional aspect of seasonal is becoming equally important in foodservice. As restaurants continue to find a balance of how seasonal fits into their overall menu, consumers are paying closer attention to the details ...

Smart Homes - US

"Smart home product sales continue to represent a small slice of expenditures on the home despite sales growth leaving room for further expansion. This Report explores how consumers view smart home hardware and home security services, providing perspective on the obstacles to growth that are preventing wider adoption."

- Billy Hulkower ...

Sport and the Media - UK

"Competition on prices has intensified, post-pay revenues are falling. At the same time, there are signs that customer retention is being eroded, and it has become more difficult to put a premium on greater data allowances. Operators are reacting by trying to foster retention through mobile data flexibility and, in ...

Property and Casualty Insurance - US

"The insurance industry is competitive, as most people make their insurance choices based on price. However, technology is sparking some real innovations in the industry, and they are beginning to attract attention. Because it is easier to attract new, young customers than it is to get older ones to switch ...

Retirement Planning - UK

"Too many people have a negative view of retirement, with many expecting their generation's retirement to be less comfortable than both those who came before and those to follow. However, increases to minimum auto-enrolment contributions are likely to show many that they could afford to save more, hopefully prompting above-mandated ...

Shopfitting - UK

"There was belief prior to the recession that the increased frequency of store refurbishments in what remains an intensely competitive retail sector had broken the highly cyclical nature of the shopfitting sector. This proved overly optimistic as large retail chains delayed the roll out of refurbishment programmes in uncertain economic ...

Smoking Cessation and E-cigarettes - UK

"After two years of disappointing sales performance, the smoking cessation sector has seen a rise in value in 2016 driven by NPD and a rise in advertising investment. In terms of E-cigarettes, overall usage remains the same despite a decline in usage as a smoking cessation method, suggesting reduced penetration ...

The Arts and Crafts Consumer - US

"There are signs that major media players, including Facebook, Twitter and Amazon, are looking to make significant plays in regards to live sport broadcasting over the coming years. Live sport could offer these platforms a powerful differentiating feature within competitive marketplaces, while also potentially presenting a genuine threat to the ...

The Financial Lives of College Students - US

"College students are typically just beginning their financial journey into adulthood. Their key financial behaviors are not yet established, and they are still looking for a more traditional banking experience. It is important to realize that investing is still somewhat of a mystery to this age group, but they are ...

The Protein Report: Meat Alternatives - US

"Protein alternatives fall into two camps: eggs and everything else. Eggs are nearly universally consumed and have the advantage of a host of health benefits to appeal to consumers. Despite being vilified at one time as being unhealthy, their protein and "good" cholesterol content are now driving many health-based purchases ...

UK Retail Briefing - UK

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

Varejo de Produtos de Beleza - Brazil

"O varejo de produtos de saúde e beleza no Brasil é único, marcado pelas vendas multicanais e pela grande oferta de produtos. Ações nos canais de compra para fidelizar os consumidores tornam-se essenciais num mercado de concorrência tão acirrada. As farmácias têm se inspirado nas drugstores da Europa e dos ...

方便面 - China

"Consumers today are crafting at similar rates to years past, with 59% of adults being categorized as a crafter. However, interest in traditional craft projects, such as photography and scrapbooking, continue to see slight declines in participation year after year, likely giving rise to less traditional types of crafting projects ...

The Night In - Ireland

"Increased inflation has impacted on disposable income levels among Irish consumers, and in turn now sees consumers preferring to spend more time in the home during the evenings, which has boosted usage of low-cost activities such as watching TV."

– Brian O'Connor, Senior Consumer Analyst

Trust and Brands - UK

"Trust acts as a building block for many other positive brand attributes, including the creation of perceived standout and brand preference. While the most trusted brands tend to be market-leading ones that have had high exposure to consumers, there are a significant minority of brands, predominantly non-FMCG, that are able ...

Unsecured Loans - UK

"The unsecured personal loans market has experienced a period of strong year-on-year growth, as record low interest rates and rising consumer confidence have led to a rise in demand. However, the Brexit vote has led to uncertainty about the UK's economic future, meaning people could be put off committing to ...

休闲餐厅 - China

"虽然休闲餐饮市场呈健康增长趋势，但市场仍然分散——随着越来越多的主题餐厅进入市场，预计这种分散将日趋严重。为了区别于其他竞争者，品牌应抓住重点，并为目标消费者提供独特的就餐体验。另外，找到有效的营销策略对品牌建设和吸引顾客上门也是至关重要的。"

洗发护发产品 - China

“人口特征的变化正在改变着方便面主要消费群体的构成。方便面类别因此面临着巨大挑战。生产商应采取行动，回应消费者需求的升级，以维持竞争力。企业采取多品牌战略和明确的品牌定位，有助于精确定位目标客户，提升消费者对品牌的忠诚度。”

空气清新产品 - China

“空气清新产品细分市场表现各异反映出消费者对该类产品的需求变化。虽然纯除味产品仍将占据市场绝对比重，但未来的增长动力将来自那些超越现有基本功能，能够应对室内空气污染或促进消费者身心健康的产品。”

— 徐如一（中国区研究总监）

零食消费趋势 - China

“消费者对高蛋白零食的浓厚兴趣使肉类零食在去年成为全球零食市场上的新宠。几百年来，肉类零食都是中国传统零食的一部分，但很少被定位为高蛋白零食。厂商和品牌可能有机会利用蛋白含量和食用方便的特征来重新定位这一深受市场欢迎但仍缺乏创新的零食品类。”

“国际品牌不断投资消费者教育，而中国品牌在这方面相形见绌。但消费者教育是必不可少的，因为中国消费者并不如制造商预期的一样成熟。韩国和日本进口产品的风靡也显示出讲述有说服力的故事的重要性。”

零售银行 - China

“如今，客户体验的定义更为广泛，不再局限于良好的客户服务态度。零售银行若想脱颖而出，需要在专业性和效率上有出色表现。值得注意的是，消费者往往以自己在不同领域的体验为标尺来衡量银行的表现。因此，确保整体表现在不同行业间都具有竞争性，对银行而言是至关重要的。”

— 过人，高级研究分析师，中国