

September 2017

## Alcoholic Beverage Mixers - US

"Dollar sales of alcoholic beverage mixers have seen steady growth in recent years, growing 15% from 2012-17 (7% when adjusted for inflation). Volume sales of cordials, liqueurs, vermouth, and aperitifs increased by 16% over the same period. Continued interest in cocktail culture, especially on premise, is helping here, as is ...

## Beauty Retailing - US

"Beauty retail is big business, garnering sales in the range of \$55 billion this year. Massive transformation is occurring as the youngest generations drive the future of the market. In-store shopping and buying is strongly preferred over online due in part to specialty beauty retailers luring in customers to immerse ...

## Better for You Snacks - US

"The BFY (better for you) snacks category grew slightly from 2016-17, but has grown more in the past two years powered both by consumer interest in snacking and brand development of offerings that find a middle ground between healthy and indulgent. Yet the category is still challenged by the depth ...

## Camping in North America - US

"Camping is one of the most popular leisure activities in North America. In a 2017 survey, the Outdoor Foundation found that among American adults aged 25 and older, camping was the fifth most popular activity, just behind cycling, itself a hugely popular pursuit. "

- Jessica Kelly, Senior Tourism Analyst

## Conferencing and Events - UK

"The conferencing and events market has continued to grow over the past year, aided by technological progress, innovation and growth across leisure markets. However, activity has been constrained somewhat by the air of uncertainty, a pressure which, alongside mounting security concerns, will remain a core challenge over the coming years ...

## Baby Personal Care - China

"Dads and mums are showing similar caring about their kids and are willing to try innovations, which means opportunities for these formerly niche products. The key is how to convince parents of the effectiveness and safety of these products. Famous brand names are not that trustworthy and parents now need ...

## Better for You Food and Drink Trends - US

"Consumers express an interest in eating healthier foods, with half saying they are eating more such foods than a year ago. Taste and quality remain paramount in their choice of these foods, closely followed by a product's ingredient content and nutrition facts. The true opportunity for BFY (better-for-you) foods going ...

## Bread and Baked Goods - Brazil

"The bread and baked goods market has challenges regarding flavor perception and, more important, the health issue. In addition to offering more healthful products, one strategy for boosting consumption and overcoming high prices could be broadening the range of products with new attributes, such as convenience, new flavors, greater control ...

## Coffee - China

"Strong growth momentum of China's coffee market is likely to continue with blossoming innovations and rising interest from younger consumers. Consumers, on one hand attach great importance to safety and authenticity and try to limit sugar intake for health reasons, while on the other hand, emotional triggers effectively drive greater ...

## Consumer Payment Preferences - US

Digital payments continue to garner a great deal of attention within the financial services industry, as innovation and technological advancements continue to push them forward. Consumer payment behaviors, however, are fairly engrained within older consumers.

Financial services providers have an opportunity to highlight the security and efficiency of new payment ...

## Consumers and Retail Banking - UK

"People who are considering switching banks are the most likely to opt in to sharing their financial data with third parties. This suggests that upcoming Open Banking regulations may help to boost competition in the retail banking sector, as those in the market for a new provider could be won ...

## Dark Spirits and Liqueurs - UK

"Drinking with mixers and gifting are key entry points for dark spirits. Mixed drink recipe suggestions are therefore a crucial means to draw in new users, while promotions around young adults' rites of passage would better enable companies to harness the power of gifting as an introduction to dark spirits ...

## Digital Trends: Fall - US

"This Report tracks ownership of electronics, intent to purchase electronics, hardware used to access the internet, and online activities, identifying shifts in consumer behavior on the basis of comparing data from semiannual surveys. Findings in this report include, for the first time, trends in the frequency of online activities, bearing ...

## Eating Out Review - UK

"Parents of under-16s and Millennials are propping up the eating out market. As a group, parents are not brand loyal, but they're willing to trade up if they feel their purchases are worthwhile. Millennials seem optimistic about their finances, yet they're also drawn to meal promotions served in a ...

## Equity Investing - UK

"Equity investing has become far more accessible over the last decade, but there are still many real and perceived barriers that hold people back. Simplicity is the key to extending the market, but a raft of regulation and remedies due in 2018 could hold progress back. Uncertainty over Brexit has ...

## Cruises - US

"The US cruise market continues to grow at a steady pace. As new ships enter the water with greater capacity and innovations, more passengers are cruising. Converting interest into action among adults who have never cruised is the key to passenger growth. Cruisers want personalized experiences that allow for enough ...

## Digital Trends in Finance - US

"While most consumers are satisfied with the digital services their financial institutions provide, improvement is still needed. Trust in the security of digital services is low, and most consumers still want to be able to talk to a human for answers to their financial questions. While institutions are doing all ...

## DIY Home Improvement & Maintenance - US

"Participation in DIY (do-it-yourself) projects in the past year has been moderate as home improvement retailers engage consumers and more DIYers rely on technology to help them plan a project. The category is still plagued, however, by an overall lack of experience in DIY projects. For this reason, future participation ...

## Emerging City Destinations in Asia - Asia

"The Chinese economy has continued to progress at an enviable growth rate of over 6% and should continue to do so for the foreseeable future. Continued growth in Chinese domestic and outbound travel expenditure is probably the single most important factor affecting the future of emerging Asian cities as tourist ...

## European Retail Briefing - Europe

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

## European Retail Handbook - Europe

This is the 21st 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

“Over the past 10 years the discount sector, both food and non-food, has shown that it is highly adaptable, succeeding to thrive in both market conditions which favoured a low-cost alternative and in conditions where traditionally there would have been less demand. With an uncertain economic outlook in the short ...

## Fragrances - US

After several years of weak performance, the \$3.8 billion US fragrance market continues to see sales slide, especially in the women's fragrance segment. Heavy competition within and beyond the category has resulted in slow category growth. Despite these challenges, interest is solid in natural fragrances, customized options, and fragrances ...

## Gaming - Ireland

“While mobile gaming is an increasingly profitable sector of the market, possible issues lie in the increased proliferation of ‘clone’ games, leaving three quarters of Irish consumers feeling many mobile games are similar, while consumers are more inclined to note they don't enjoy mobile games as much as those on ...

## Hot and Cold Cereal - US

“As more consumers prioritize quick, healthy, portable breakfast foods that keep them full and energized, the cereal category continues to decline. Still, cereal remains a huge category with near-universal penetration. The key to reinvigorating the cereal category may lie less in trying to fix its inherent shortcomings than leveraging its ...

## Family Planning and Pregnancy - UK

“A declining birth rate remains the core barrier to the growth of the family planning and pregnancy category, but limited product innovation also remains a challenge. Digital advances in fertility tracking and pregnancy tests are affording consumers more information than traditional testing products as they look to conceive, which brands ...

## Fragrances - Brazil

“The fragrance market in Brazil is unique: the strength of national brands is significant and ensures the category retail sales a good performance, despite the economic recession. Mintel data shows that a majority of Brazilians use national fragrances bought in physical stores. However, the category has some obstacles to overcome ...

## Fragrâncias - Brazil

“O mercado de perfumes no Brasil é único: a força das vendas das marcas nacionais é muito grande, o que faz com que a categoria garanta as vendas no varejo, apesar da crise econômica brasileira. Porém, a categoria ainda deve vencer alguns obstáculos, como a falsificação de produtos e a ...

## Holiday Shopping (Non-Winter) - US

Most consumers celebrate non-winter holidays, but that doesn't necessarily translate to spending for every occasion. Holiday traditions, lifestyles and other factors could influence whether or not consumers actively celebrate, and ultimately spend for, various holidays. Consumers are mostly consistent in the types of holidays they prioritize spending on and their ...

## Ice Cream and Desserts - UK

“The ongoing popularity of meal deals holds further opportunities for ice creams and desserts, as 20% of category users are interested in each of these as part of lunchtime meal deals.”

## Innovation on the Menu - US

Generational preferences continue to divide the menu with restaurants striving to meet the demands of all. Younger generations lean toward more casual and shareable menu items for any occasion with older generations relying on the traditional entrée. International restaurants have an opportunity to attract diners across demographics with consumers significantly ...

## Juice - China

“Under a shrinking volume market, sustained trading up for packaged juice is fundamental for future market growth. New interpretations of high-quality pure juice in the forms of cold-pressed and NFC have emerged in China yet still need further progress. Companies and brands may also highlight consumption benefits and not just ...

## Leisure Centres and Swimming Pools - UK

“With more public leisure centres and swimming pools being run out-of-house by external companies, the standard of these facilities may improve. All the signs are there for increased usage; both consumers and the Government appear to be placing greater focus on leading active lives which should benefit leisure centres.” ...

## Long-haul Holidays - UK

“Budget long-haul fares are becoming economically viable for airlines. Cheap oil and new fuel-efficient planes like the Boeing 787 Dreamliner and the smaller 737 MAX are increasing margins. Consumers are also more open to a no-frills long-haul service. But long-haul destinations must compete with cheaper places locations closer to home ...

## Marketing to Black Moms - US

Black moms are the head of the family within many households. She works, mostly because she has to, even though her role as mom is her greatest accomplishment and primary responsibility. She is raising her kids with confidence, although she would prefer to be able to devote more time to ...

## Jewellery & Watches Retailing - UK

“The UK jewellery and watch market looks set to become increasingly challenging. Prices are rising and domestic demand is softening as a result. Growth in the market is being driven by sales of luxury watches amongst tourists taking advantage of a weak Sterling. However, one in four UK consumers plan ...

## Laundry Detergents - UK

“Continued reduction in household spend on laundry detergents has strengthened an association between value and low price, which brands need to address if they are to see growth return. Promoting how developments can save money in the long term, or that expand on the theme of convenience, could encourage interest ...

## Living and Dining Room Furniture - UK

“The living and dining room furniture sector is facing a challenging year as inflation erodes consumers’ disposable income leading many to put off larger purchases. With consumers increasingly likely to live in smaller homes and to rent privately, there is growing demand for furniture that is more versatile to maximise ...

## Long-haul vs Short-haul Holidays - China

“While growth rates of both long- and short-haul holiday markets are slowing down, consumers see their holiday goals more clearly with a preference for sightseeing and relaxation, thanks to the greater volume of holiday information they can acquire. Common travel products and services are not attractive any longer, since consumers ...

## Marketing to Hispanic Moms - US

“There are nearly 7 million Hispanic moms in the US, who live for their families. Household chores monopolize most of their time at home, regardless of whether or not they work full-time. Even if they would welcome help, they tend to be hesitant to ask for it. Shouldering the sometimes-thankless ...

## Marketing to Moms - US

"The 43 million moms in the US are an important segment for marketers to understand, as they are often making purchases for the entire household. Although some family dynamics have changed – with more women having children without getting married, having children later in life, and having fewer children – ...

## Marketing to Students - China

"Chinese university students are more into trend-leading brand propositions than before and respect values that they do not necessarily agree with. They tend to be more laidback than older generations – appreciating flexible opportunities for learning and earning and shying away from aggressive and pushy ways to achieve."

– ...

## Media Consumption Habits - UK

"As streaming markets become more congested, services are giving greater priority and promotion to content discovery features. People have a growing expectation that streaming services should be able to find them the most suitable new content amongst their vast libraries. Successfully helping people discover new content that they enjoy will ...

## Milk and Cream - Ireland

"Milk production and sales have bounced back in 2017 from the turmoil caused by the end of the milk quotas in 2015. While milk usage among Irish consumers remains high, the potential for Brexit to interrupt milk processing on both sides of the border remains a threat to the prosperity ...

## Non-dairy Milk - US

"Non-dairy milk has seen growth in 2017 and is expected to continue this trend through 2022. Largely influenced by almond milk, innovative plant bases are adding variety in flavor and nutritional value to the category, both drivers of non-dairy milk. The majority of non-dairy milk consumers indicate increased purchase compared ...

## On-premise Alcohol Trends - US

## Marketing to Sports Fans - US

"85% of US adults follow at least one sport. The most passionate sports fans, Avid Fans, almost never miss a game/event for the sport/team they follow and account for more than half of sport fans (43%) or 109 million adults. America's sport of choice is football, which attracts ...

## Mechanical and Electrical Engineering - UK

"The M&E sector is now facing very different prospects, depending on the customer focus of the contractor. This is a direct consequence of the Brexit decision and the varied impact it has already demonstrated. There remain some very strong areas of demand, while others are faltering amid economic uncertainty".

– ...

## Menu Insights - China

"Consumers want a focused menu from restaurants to show expertise and authenticity. As they are getting more explorative with different types of cuisines, there is opportunity for more specialised restaurants featuring niche regional and exotic cuisines. On the other hand, Chinese light meal is another area worth tapping into given ...

## New Cars - US

New vehicle sales through 2017 have confirmed that the auto industry hit "peak auto" in 2016, meaning growth in new vehicle sales will end this year. Despite the slowdown, Mintel estimates a healthy 17 million units will be sold in 2017. The stagnant market means that auto manufacturers will need ...

## Nutritional and Performance Drinks - Canada

"Just under half of Canadians (45%) are buying nutritional and performance drinks/mixes. Purchasers are driven by an interest in increasing energy and rehydration. While taste and flavours shake out as the top factors considered for purchase, protein content and functionality are also key factors owing to the fact that ...

## Pães e Produtos Assados - Brazil

"On-premise alcohol sales continue to grow despite falling volume consumption indicating that consumers are ordering fewer but more expensive drinks when they go out. Drinking away from home tends to revolve around occasions with consumers ordering drinks that correspond to the current occasion. By understanding what drink goes with what ...

## **Pay TV and Streaming Services - Canada**

"The market for pay TV cable and satellite has been on the decline for several years now, while pay TV via the internet has seen substantial growth in the past five years. This represents an adjustment of how consumers consume media, thus brands in the category are putting an emphasis ...

## **Planning for Long-term Care - UK**

"Long-term care is not something most expect to need or will indeed require, making it a difficult thing to plan for. Despite the current lack of products that help people to plan and pay for long-term care, Mintel's research suggests a reasonable level of support for the idea of insurance ...

## **Poultry & Poultry Substitutes - Ireland**

"The Irish poultry market continues to perform well with strong demand for chicken products helping to drive sales. Going forward, an opportunity exists to promote turkey as a healthier alternative due to consumer concerns over fat. Poultry producers will also need to address the demand for transparency on sourcing in ...

## **Serviced Offices - UK**

"Companies will need to respond to the needs and aspirations of both younger and older generations to attract and retain the best employees. Neither generation is driven primarily by finances, with quality of life, flexible working, and careers the key elements that will drive future demand for serviced office space ...

## **Small Business Banking - UK**

"A categoria de pães e produtos assados possui desafios em relação à percepção de sabor e, especialmente, à questão da saudabilidade. Diante disso, além de oferecer opções de produtos mais saudáveis, uma forma de fortalecer a categoria junto aos consumidores e driblar a alta dos preços pode ser ampliar a ...

## **Pet Supplies - US**

The pet supplies market reached \$11.4 billion in 2017, a 3% increase from the previous year. The pet humanization trend continues to benefit the market as pet owners are equating their pets' needs and interests to their own. This is generating interest in pet supplies and services that follow ...

## **Plumbing - UK**

"Demand for plumbing products has been buoyed by the en-suite trend, high house price inflation encouraging home improvement activity, and relatively strong new construction activity. Kitchens and bathrooms are seen as lifestyle statements and are very important to consumers and property vendors. The uncertainties introduced by Brexit are expected to ...

## **Residential Care for the Elderly - UK**

Higher quality and cost-effective health and social care could be achieved if the NHS and care home operators communicate and engage in discussions on how to improve both health and social care."

– **Lewis Cone, B2B Analyst**

## **Single Lifestyles - UK**

"While the rising cost of living has undeniably proven a challenge for all demographic groups, this is especially true for singles who may have no choice but to shoulder financial burdens alone. This has very real commercial implications as the group's consequently reduced spending power makes them a more challenging ...

## **Solar Panels - UK**



“The small business banking market is taking steps to address the concerns raised by the CMA by increasing competition and differentiation, particularly through the introduction of innovative and useful digital tools. However, there is a long way to go. Small business owners continue to consider all banks more or less ...

## Spa, Salon and In-store Treatments - UK

“The sector continues to see slow and steady growth, as the proportion of people having treatments such as facials and massages saw a rise in the period 2015-17. Beauty treatments, however, remain associated with special occasions and treats, suggesting that significant growth will come from overcoming this perception. Value also ...

## Televisions - UK

“With consumers prioritising improved picture quality over fundamental changes to the viewing experience, 4K TVs will prove more popular than 3D technology in the long-term. With growth slowing due to economic uncertainty and rising import costs, educating consumers on the benefits of the technology and effectively showcasing an expanding content ...

## UK Retail Briefing - UK

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

## Video Games and Consoles - UK

“The launch of the Nintendo Switch is reinvigorating a video game market that is declining as it enters the fourth year of the current console generation. Developers are adopting post-purchase micro-transactions as a revenue stream, making player retention a more important focus for console games than it has been in ...

## Vitamins, Minerals & Supplements - US

“Future growth in a subsidy-free solar PV market will largely be driven by the continued fall in installation costs and the increased availability of affordable and efficient solar-plus storage systems. For solar PV to become attractive without subsidies, there is also a need to unlock deployment on buildings in the ...

## Sports Participation - UK

“Fitness is both the main driver of participation in sport and the principal barrier to taking part. Successful providers need therefore to articulate the fitness benefits of their activities while allaying the fears of potential newcomers that they are not fit enough to join in.”

– **David Walmsley, Senior ...**

## The Responsible Traveller and Authenticity/Community-based Tourism - International

“Once the most alternative of responsible tourism’s niches, community-based tourism has matured and is looking to stake its place at the mainstream tourism table.”

– **Jessica Kelly, Senior Tourism Analyst**

## Vehicle Recovery - UK

“The vehicle recovery market continues to grow and develop, boosted primarily by an ever expanding car parc. Although mature and highly competitive it is continuing to evolve, with recent attention being given to new styles of policy and the use of technology. Although dominated by three major players,, smaller companies ...

## Vitamins and Supplements - UK

“The UK’s health trend has underpinned much of the success in the market over the last 4 years; however, an increasing focus on exercise and healthy eating has lessened consumer reliance upon vitamins and supplements. The upsurge in popularity of elimination diets provides an opportunity, while exploring tailored supplement plans ...

## Weight Management - US

Sales are beginning to slow as Mintel estimates growth for the vitamins, minerals, and supplements market in 2017. Consumer struggles with trust, cost, and the shopping experience are a challenge to the category, although many still believe in the benefits of these products. To best position themselves, category players should ...

## Yellow Fats and Edible Oils - UK

"Changing eating habits, particularly bread being eaten on fewer occasions, has had an impact on sales of butter and spreads. Butter has benefitted from interest in natural and less processed products and received a recent boost from higher retail prices, but encouraging new uses will be important in driving future ...

## 咖啡 - China

"中国咖啡市场创新不断，更年轻一代的消费者们对咖啡更感兴趣，因此该市场将保持迅猛增长的势头。一方面，消费者看重安全性和正宗性，出于健康考虑会控制糖分的摄入量；另一方面，情感因素可以有效地带动饮用量的增加，追求纵享的消费者依然偏爱来额外成分带来的浓郁口味。国际品牌开始本地化，本土和新兴品牌表现强劲，市场竞争趋于激烈。品牌将前所未有地面临竞争浪潮中的跌宕起伏。"

— 吴丝，研究分析师

## 果汁 - China

"在市场销量不断萎缩的大环境下，可持续性升级消费是保证包装果汁市场未来增长的关键。以冷压和非浓缩还原等全新形式生产的优质纯果汁已在中国市场上出现，但仍需进一步发展。无论是100%纯果汁，还是非100%纯果汁，公司和品牌都需要强调产品的健康益处。聚焦就餐场合对提升饮用频率至关重要。"

— 李蕾，研究分析师

## 针对大学生的营销 - China

"中国大学生比以往更青睐时尚前卫的品牌定位，尊重他们不一定会认同的价值观。他们往往比老一代更放松，推崇悠闲自得的学习和赚钱机会，不会急于求成。"

— 马子淳，高级研究分析师

"The market for weight management products and services has a significant base of consumers. As the notion of what is considered effective in weight management continues to evolve, products that maintain a traditional diet formulation have struggled to keep up. Meanwhile, weight management brands that put nutrition first continue to ...

## Yogurt and Yogurt Drinks - Canada

"Yogurt's longer-term growth in the Canadian market is a broader reflection of what consumers are demanding from what they eat and drink. Yogurt is perceived, by many, to be healthy, tasty and convenient. As a category, yogurt has a history of producing innovations that capitalize on emerging areas in health ...

## 婴幼儿护理用品 - China

"奶爸和宝妈们的育儿习惯和顾虑相似。他们都乐于尝试创新产品，因此以往属于小众品类的产品现在大有发展机遇。品牌发展的关键是让消费者相信产品的功效和安全性。知名品牌不再像过去一样值得信赖，因此消费者需要结合专家建议和其他奶爸宝妈的育儿经验来选择产品。"

— 李玉梅，研究分析师

## 菜单洞察 - China

"消费者希望餐厅专注于一个菜式领域，以彰显专长和正宗。随着消费者越来越喜欢尝试不同类型的菜式，主打小众地方菜和异域菜的特色餐厅将大有前景。另一方面，随着消费者的健康意识不断增强，轻食中餐是另一个值得进军领域。"

— 陈杨之，研究分析师

## 长途 vs 短途假期 - China

"长途和短途假期旅行市场的增速齐齐放缓，但消费者由于获取的假日信息日益增多，其假期目标也更明确，即更偏爱观光和放松。套路化的旅游产品和服务已失宠，消费者如今青睐更多定制和本地化元素以满足其不同的诉求。"

— 黄一鹤，研究分析师