

September 2016

Alcoholic Drinks: Attitudes towards Drinks Gifting - UK

"Alcoholic drinks are bought by six in 10 people as gifts, but packaging products to appeal to more people and occasions, such as for female recipients or as a thank you can unlock new occasions. Encouraging trading up through better promoting the premium credentials of products will also help to ...

Better for You Snacks - US

"Strong growth in BFY snacks comes from an increase in availability of products in this relatively young space, at a time when consumer habits favor snacking and eating on-the-go, and a dual interest in healthy living and the pursuit of flavor. While the products covered in the scope of this ...

Business Travel Worldwide - International

"The medium-term outlook for business travel has darkened somewhat as protectionist sentiment is on the rise in most Western societies and the BRICs can no longer be counted on to lead world growth. In spite of demographic and technological changes, travel managers and corporate travel programmes still have a future, but ...

Coffee - China

"Though the penetration of drip-bag coffee is still low in China, drip-bag coffee has the convenience of instant coffee and the original taste of freshly brewed, and the medium price range between the two. In addition, as its format is similar to traditional Chinese tea bags, consumers could easily adapt ...

Conferencing and Events - UK

"The UK conferencing and events industry is in great health, revealed by consecutive and significant value growth across the market over the past decade. This expansion is expected to continue, though it could be

Attitudes towards Frozen Food - UK

"Frozen food is a near-universal part of British menus, spurred by the strong value for money and convenience image of buyers' favoured products. Yet for many people this only entails a handful of product types. Current consumer trends pose challenges for frozen, as many buyers lack confidence in cooking with ...

Better-for-you Eating Trends: Spotlight on Real - US

"When seeking better-for-you foods, consumers avoid certain elements in their diets, chiefly artificial ingredients of all forms, and express a general distrust of genetically modified ingredients. At the same time, many consumers are seeking foods with added health attributes, namely protein, fiber, and whole grains. Brands have focused product innovation ...

Charitable Giving - UK

"As donors become more discerning in their giving, impact-driven donations could become the gold standard in the sector. In an era when social media drives a greater share of donations, transparency and proper data management will be key to engaging and holding on to donors, particularly as the impact of ...

Coffee - US

"Future growth is expected to remain healthy, supported by the current popularity of coffee and greater premiumization across segments. High quality ingredients and premiumized production and brewing methods transport the category into the Third Wave of coffee, which elevates the drink to more than just a commodity type beverage. Single-cup's ...

Consumers and Retail Banking - UK

"The traditional retail banking providers continue to retain a dominant share of the market, despite the threat posed by challenger banks and innovative FinTech

jeopardised by the UK's recent decision to leave the EU, which has bought an air of ...

Consumers and the Economic Outlook: Quarterly Update - UK

"For the UK, the EU referendum is one of the defining moments of the 21st Century so far, with long-term implications that will rival events as seismic as the financial crisis. The truth is, though, that this early in the process there has been little direct impact on most people's ...

Department Store Retailing - US

"There is no doubt about it: department stores are struggling to stay relevant in today's retail climate – losing sales, customers, retail space, and partner brands. Sales continue to fall YOY (year-over-year) with no signs of stoppage in the foreseeable future. Radical change and innovation is needed in the sector ...

Digital Trends Fall - US

"The line between hardware markets and software markets continues to blur as companies from both sides partner up to change the experience of interacting with physical devices. Brands must also be ready for the upcoming flood of data-generating devices as consumer adoption of smart products rises."

Equity Investing - UK

"Low savings rates and new technology should make investing in equities an attractive proposition for those who have become disillusioned with the cash savings market. However, ownership across the adult population remains low and a risk-averse attitude continues to hamper the uptake of investment products, with recent market volatility off-putting ...

European Retail Briefing - Europe

This review looks at:

firms. However, the implementation of Open Banking by 2018 poses another threat, by making it easier for consumers to identify where they could get better value ...

Dark Spirits and Liqueurs - UK

"Despite the inexhaustible supply of recipes for cocktails and other drinks on the internet, the notable interest in on-pack suggestions indicates a need for brands to do more to put these ideas into the path of the shopper."

– **Emma Clifford, Senior Food and Drink Analyst**

Diet Trends - US

"The market for diet products has faced slight declines since 2011. As what consumers consider "healthy" continues to evolve, diet products have struggled to keep up with changing preferences. Packaged and processed foods continue to fall out of favor, shrinking the opportunity for diet foods but opening up new possibilities ...

DIY Home Improvement and Maintenance - US

Macroeconomic indicators point to a healthy outlook for the DIY (do-it-yourself) market. Most adults have at least some DIY skills and complete home improvement projects on an occasional basis, though a skills gap continues to limit the project scope of many consumers and curbs participation in the category. In order ...

Estilo de Vida dos Acima de 55 anos - Brazil

"Pessoas acima de 55 anos gostam de passar o tempo com a família e os amigos. Por isso, muitas empresas de diferentes setores poderiam se beneficiar ao combinar as necessidades de consumidores mais velhos e mais jovens."

European Retail Handbook - Europe

This is the 20th edition of the European Retail Handbook. In it we provide the essential background

information to understanding the retail scene in each European country.

Exercise and Fitness - Ireland

"As the health trend in Ireland continues to accelerate we find this is making consumers more active in an effort to stay fit and healthy. However, the marketplace for gyms and fitness centres is changing as a result of the cost-cutting consumer mindset – leading to the expansion of no-frills ...

Fashion: Technology and Innovation - UK

"In an increasingly challenging clothing market, retailers are having to do all they can to stand out from the competition and we are seeing more companies actively searching for the latest technology innovations. While many of the latest innovations such as magic mirrors, in-aisle payments and online sizing tools can ...

Food and Non-food Discounters - UK

"Aldi and Lidl are continuing to take sales away from the grocery multiples by expanding their store estates and dispelling the perception that low prices means sacrificing on quality. But UK consumers struggle to differentiate between the two and this will need to change as they increasingly find themselves competing ...

Gaming Consoles - US

"The console hardware market has not seen growth in total unit sales for several years. However, this represents an evolution of the market – one that places great emphasis on software and services sales. Brands are increasingly challenged to raise the long-term value of their customers."

-Bryant Harland, Senior Analyst ...

Insurance Purchase Channels - Canada

"On-demand insurance through digital channels is set to increase in popularity but for now traditional channels dominate the distribution landscape."

Family Midscale Dining - US

"The midscale chain is in a state of flux; while some of the biggest names in midscale dining are doing well, other chains are on the brink of bankruptcy. The successful midscale restaurants have upgraded their units and menus and have fully embraced social media as a way to connect ...

Financial Capability - UK

"Engaging consumers early and making it easy for them to develop good habits and pick up knowledge is key to raising financial capability. Developments such as the introduction of compulsory financial education and the launch of the UK Financial Capability Strategy have put financial capability at the heart of strategy ...

Fragrances - US

"Performance in the fragrances market has been lackluster due to the saturated nature of the category, increased competition from scented personal care items, and apathy among shoppers. Interest in natural claims can present opportunities for brands to better reach consumers, while custom or boutique fragrances may encourage increased consumer spend ...

Innovation on the Menu - US

"Menus are increasingly getting more layered with flavors, ingredients, and preparation methods. Restaurants are facing increased pressure to create a menu that is both comprehensive and digestible for foodies and non-foodies alike."

Japan Outbound - Japan

"A shift from long-haul to short-haul tourism has helped many tourists fulfil their desires to travel abroad, particularly those in lower-income groups. Asian markets have proved more popular in recent years as

Jewellery and Watches Retailing - UK

“The jewellery and watches market in 2016 has been boosted by an increase in spend from overseas visitors taking advantage of the favourable exchange rates. There have been continued strong sales of watches and resilient demand for precious metal jewellery, yet the costume jewellery segment remains weak.”

Leisure Centres and Swimming Pools - UK

“Increased outsourcing of public leisure centre and swimming pool provision is proving a positive influence on investment and revenues but finds facility users sensitive to rising admission prices and risks de-prioritising public health and activity goals.”

– David Walmsley, Senior Leisure Analyst

Luxury Retailing - China

“Consumer attitudes to luxury brands have changed recently as the market has recovered growth, if at a slower pace than before. Attitudes are increasingly focused on experiences rather than only things, and increasingly diverse consumers are choosing from a much wider range of brands. Luxury retailers have to adapt to ...

Marketing to Hispanic Moms - US

"Hispanic moms are devoted to their families and their homes. They feel they are doing a good job as mothers. They recognize there are challenges associated with motherhood and managing their households. However, unacculturated Hispanics seem to welcome those challenges and be mentally ready to handle them; as Hispanic moms ...

Marketing to Over-55s - Brazil

“Seniors like to spend their time with family and friends. Therefore, many companies in different industries could

travellers have cut back on expenditure and looked for cheaper travel options.”

- Jessica Kelly, Senior Tourism Analyst

Kitchens and Kitchen Furniture - UK

“Popularity of creative home cooking and baking, especially at weekends, is adding to a love of gadgets and small kitchen appliances, which in turn means that people need to make the most efficient use of their storage and work surfaces. Creating more work spaces and better storage are key factors ...

Long-haul Holidays - UK

“Despite a rise in volume in 2015, long-haul destinations lost market share to short-haul destinations. In 2016, long-haul faces even stiffer competition from short-haul. Following the Brexit result and the resultant drop in value of the Pound, many consumers will opt for relatively cheaper destinations within Europe. However, oil is ...

Marketing to Black Moms - US

"Black moms are the information gatekeepers, product and service decision makers, and the representative of her household. Although she is stretched across her parental and personal responsibilities, she takes comfort in knowing that her village – headed by her mom – will serve as a guidepost and help her make ...

Marketing to Moms - US

"Moms today are having their first child later in life and are choosing to have smaller families. Increasing childcare costs and limited benefits for working moms (such as paid maternity leave), are leading more moms to consider staying at home. Ultimately, moms today are proud of their parenting decisions and ...

Marketing to Parents - Canada

"As parents are more likely to be working full time than ever before, the approach to parenting necessitates a

benefit from combining the needs of older and younger consumers.

The number of seniors who are working beyond retirement is also increasing. This not only has implications for the future of the workforce ...

Marketing to Teens - China

“Chinese teenagers are more digitally savvy than older generations. This makes them feel globally connected and gives them easier access to information and knowledge, but also exposes them to many distractions from school work and places them under a high level of competitive pressure. Coupled with an inability to handle ...

Mechanical and Electrical Engineering - UK

“The M&E sector now faces a new challenge: the impact of Brexit. Having started to enjoy growing demand as construction activity and consumer/business confidence was restored following a prolonged recession, the sector now faces economic uncertainty and delayed investment decisions. There remain, however, opportunities to drive the sector forward ...

Men's and Women's Footwear - US

This report will help you to uncover opportunities and understand the key issues affecting your market. How? By giving you instant access to analysis and critical recommendations. It will also challenge routine thinking by providing fresh, new perspectives that energizes your thought processes.

Mobile Banking - US

"Consumers increasingly use their mobile devices – especially their phones – to manage every aspect of their lives. However, this reliance has not transferred completely to banking. This Report will examine some of the reasons why this is so and the steps financial institutions can take to increase interest, and ...

Online and Mobile Shopping - US

certain level of independence from their children. The result is a greater respect afforded to their children, evidenced by greater input from children on family activities. This comes with the side ...

Meat and Meat Substitutes - Ireland

“Growing concern over health is likely to increasingly guide consumers when selecting meat products, and may see consumers limit their weekly usage of processed meats and opt for leaner types of meats in order to maintain a healthy diet. This trend will help to generate greater opportunities for meat substitute ...

Media Consumption Habits - UK

“As the music streaming market becomes increasingly competitive, the volume of exclusive content and the effectiveness of content discovery systems are set to become key distinguishing features for consumers when choosing which service to select and stay with.”

– Rebecca McGrath, Media Analyst

Menu Insights - China

“Consumers’ preference for staple food and a side dish is different at breakfast, compared to lunch and dinner. Breakfast menu can drive growth for foodservice operators, especially when more consumers tend to have breakfast out. Menus specifically for kids can be appealing to families. Moreover, offering flexible portion sizes can ...

New Cars - US

"Over the past seven years the new car market has experienced consistent growth as the US economy recovered from the Great Recession. The market's recovery from the Great Recession was remarkable. Mintel estimates slower growth for 2016 sales figures followed by a downturn in the automotive sales cycle before recovering ...

Payment Preferences - China

"Online sales doubled from 2011-16, with steady growth of 14-16% annually. Enabling this growth through 2015 were rising numbers of households with access to broadband, as well as rapidly rising ownership of smartphones and tablets. Since the gains from these key drivers has already occurred and may have reached a ...

Pizza - US

While annual growth in the pizza category has fluctuated over the last several years, the pace picked up modestly in 2015 and 2016, buoyed by growing interest in more premium pizzas. Pizza marketers and retailers have an opportunity to accelerate growth further by continuing to introduce creative new flavors and ...

Recruitment - UK

"Amid some turbulent external factors, leading recruitment companies have looked to ensure profitability and sustainability through a number of ways in recent years. This has primarily been through diversification, whether across new market sectors, international arenas, or more specialist employment. The coming years could see heightened instability following the UK's ...

Seniors and Health - US

"The number of Seniors, adults aged 65+, is on the rise and by 2021 they will account for 17.3% of the total US population. Seniors are generally optimistic about the future and are investing in their health despite the health challenges that naturally come with aging. The current age ...

Solar Panels - UK

"The latest government cuts have already proved hugely damaging to the UK solar PV sector, which has seen deployment levels plummet during the first half of 2016. The Solar Trade Association estimates that a third of all solar jobs have been lost since July 2015, with a large number of ...

TV Viewing Habits - Ireland

"Chinese consumers are enjoying the benefits of mobile third-party payments way before the Western world. It is a joint result of the government support on payment development, the down-to-earth promotions of payment organisations and the open attitudes of consumers. The leading companies are exploring closer partnerships with banking institutions, domestic ...

Railways in India - India

"Railways, perhaps along with post offices, are the only two institutions in India with a deep network which, if tapped judiciously, can create substantial improvements in the hinterland. Railways were always considered only as a mode of transport in our country. We want to see railways as the backbone of ...

Residential Care for the Elderly - UK

"The challenges of providing high-quality elderly residential care in a country with an ageing population and stagnating spending levels means that an innovative and long-term response is needed. Despite substantial investment in new and refurbished capacity in the independent sector over the last two decades, a considerable amount of existing ...

Snacking Eating Habits - Motivations and Attitudes - Canada

Snacking is truly the fourth meal of the day for Canadians with its popularity extending to both in and out of home. Snacking is an adaptable occasion, and as such so must be manufacturers, retailers and foodservice operators to compete in the space. While health in snacking is important for ...

The Ethical Brand - UK

"The way that consumers judge the ethics of brands in general often differs dramatically from the way that they judge specific brands they that know and use. Many other factors aside from ethics come into play when people decide which brand to use, and ethics can sometimes be overlooked if ...

UK Retail Briefing - UK

“Despite traditional TV viewing habits remaining strong, TV viewing has become more fragmented. Broadcasters will need to embrace multi-device viewers and develop viewing profiles of consumers who are accessing content in different ways. This will help broadcasters to attract viewers by delivering the right content, on the right platform and ...

Vehicle Recovery - UK

This report will help you to uncover opportunities and understand the key issues affecting your market. How? By giving you instant access to analysis and critical recommendations. It will also challenge routine thinking by providing fresh, new perspectives that energizes your thought processes.

Weight Loss and Health Supplements - China

“Despite a big population of people diagnosed with overweight issues, the weight loss market in China only achieved moderate growth in 2015-16. The health supplement market grew faster by comparison, but still remains highly fragmented with fierce competition. There is no reason for brands to think this is an easy ...

Yellow Fats and Edible Oils - UK

“A guarantee of fair pay to farmers offers a promising means for butter/spreads/oils producers to establish a point of difference and to drive sales given the strong consumer interest in the issue. The fact that many oil buyers are not influenced by price further underlines the possibilities in ...

咖啡 - China

“虽然耳挂式咖啡在中国市场上的渗透率仍然很低，但该类兼具速溶咖啡的便利和现泡咖啡的原汁原味，其价位也是介于二者之间。另外，其形式与中国传统袋泡茶接近，因此消费者可以很容易就习惯于耳挂式咖啡的使用，并认为这种咖啡更天然、加工程序也更少。因此，英敏特预测耳挂式咖啡可能是下一个热卖咖啡品类。”

支付方式喜好 - China

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

Vitamins and Supplements - UK

“Increased NPD and investment in marketing helped return healthy growth to the vitamins and supplements market in 2015. Demographically positioned vitamins proved among the biggest success stories of the year, reflecting consumer demand for more targeted health solutions and indicating that brands could generate more interest in the category by ...

Western Spirits - China

“China's Western spirits market is under pressure and reflects how the anti-extravagance campaign has affected the luxury sector. Market recovery has been seen and future growth can be projected based on current forecasts and trends, such as premiumisation in the non-business sector and positive consumer indicators. While the bulk of ...

减肥和健康保健品 - China

“尽管体重超重人口数量庞大，但中国减肥产品市场在2015-2016年只实现了小幅增长。保健品市场相比增速更快，但仍然高度分散，竞争激烈。品牌不应该基于消费者不惜为健康买单就认为这是一个容易的市场。

— 徐如一（中国区研究部总监）

奢侈品零售 - China

“虽然增速不如以前，但奢侈品市场已回暖，消费者对奢侈品牌的态度也发生改变。消费者越来越重视体验而非产品本身，其喜好各不相同，所选择的品牌更加多样。为适应消费者的多极分化，奢侈品零售商必需更加了解其潜在和现有的客户群体，调整品牌为满足消费者不断变化的需求。这还意味着调整零售渠道以适应消费者到国外和网上购买奢侈品的习惯。市场未来增势应该依然强劲，但竞争将加剧，导致品牌更加难赢得消费者的芳心。”

菜单洞察 - China

“中国消费者享受第三方移动支付带来的好处比西方国家早得多。政府对支付产业发展的支持，支付机构接地气的营销，和消费者对新生事物所持的开放态度，这三个因素共同作用的结果是移动支付市场的繁荣。业内领先公司正尝试加深和银行机构、国内国外商户以及国外同行的合作。今后的支付方式将能体现用户的生活方式和个性。”

— 过人，高级分析师

西方烈酒 - China

“中国西方烈酒市场正面临前所未有的压力，政府推行的反奢侈浪费运动对奢侈品的冲击在中国西方烈酒市场上表现得淋漓尽致。但市场回温迹象已开始显现，根据目前的推测和趋势（如非商业消费的高端化趋势以及乐观的消费者指标）可预计未来市场将重回增长轨道。虽然西方烈酒市场主要由领先企业所掌控，但这些企业仍需通过营销、拓展饮用场合和购买渠道来攫取销售份额和提高积极心态，从而赢得消费者的信任和信心。中国西方烈酒的前景广阔，中国消费者日益讲究挑剔意味着市场仍有创新和探索的空间。”

— 李蕾，研究分析师

“相比午餐和晚餐，消费者对早餐主食和配菜的偏好有所不同。早餐菜单可推动餐厅的业务增长，尤其是如今越来越多的消费者选择在外面吃早餐。专为儿童设计的菜单对家庭消费者具有吸引力。另外，提供灵活的菜量选择可以吸引消费者，尤其是女性和未婚消费者”。

— 徐天韵，高级研究分析师

针对青少年的营销 - China

“中国青少年比老一辈人更精通电子科技。这使得他们能一键互联世界，更容易获取信息和知识，但沉迷网络世界也耽误了他们的学业，使其面临着更大的竞争压力。抗压能力不强使很多青少年缺乏自主性和独立性。由父母帮他们做大部分的决策，将绝大多数的时间放在学习上，青少年很难成熟起来。另外，受到父母集体主义思想的影响和西方个人主义文化的熏陶，中国青少年处于“遵循传统”还是“追求个性化”的矛盾中。”

— 马子淳，高级研究分析师