

June 2017

Active Holidays Worldwide - International

“Active travel is the best way to connect with the world and with nature. The great outdoors are at the heart of active travel, and taking time out to be amongst nature and appreciate the world around us is the perfect recipe for a rewarding travel experience.”

Attitudes towards Leisure Venue Catering - UK

“UK consumers are taking part in leisure activities more frequently than in recent years. With the value of the pound being affected by Brexit venues should see further increases in both UK and overseas visitors. Catering facilities at these venues are in a prime position to take advantage of this ...

Attitudes towards Sports Nutrition - UK

“Sports nutrition continues to enjoy growth thanks to it having attracted a more diverse user group; however, the category is facing intensifying competition from mainstream foods embracing a high-protein proposition. Demand for sports nutrition products made with all-natural ingredients and those without sugar highlight areas of focus for brands going ...

Bodycare - China

“Bodycare in China has long been all about moisturising and lack of innovation. But consumers are asking for more than pure moisturising, as they demonstrate various demands for body skin improvements and particularly high earners have opted for advanced products like body treatment oil rather than basic body moisturisers. Given ...

Brazilian Lifestyles - Spending Habits - Brazil

“Many Brazilians are still dealing with unemployment, having to change their spending habits during the current economic crisis. Although they are willing to pay

Attitudes towards Casual Dining - UK

“Diners are coming through the doors because of set menus and freebies but they are also demanding greater customer experience. This includes fast speed of service and quality of the atmosphere. With home delivery, operators can cater to diners who are not inclined to travel for a casual meal. Operators ...

Attitudes towards Ready Meals and Ready-to-cook Foods - UK

“That over half of ready meal/ready-to-cook eaters/buyers opt to cook from scratch more when money is tight leaves the sector vulnerable given that mounting inflation is expected to put pressure on disposable household incomes. However, premium products should benefit from people choosing these as a money-saving alternative to ...

Beauty and Personal Care Accessories - US

“The BPC (beauty and personal care) accessories market experienced gains in 2017 (est), driven by strong consumer interest and increased availability of make-up brushes and sponges. Going forward, brands can nurture interest in make-up brushes by positioning themselves as experts and providing women with the tools they need to confidently ...

Books and e-books - UK

“The print book revival continues as consumers, young and old, demonstrate an appreciation for being able to tangibly own and read physical content. In contrast, the e-books market has stagnated, indicating that innovation is needed to regenerate excitement around the format and more distinctly distinguish e-books from the currently favoured ...

Carbonated Soft Drinks - UK

“While the Sugar Levy is likely to impact heavily on CSD sales, sugary variants in particular, there is marked opportunity to move sugary CSD drinkers over to diet/light variants. Low price and proving the flavour credentials of these variants are key to encouraging

off debts and save money for the future, many consumers still spend extra money on entertainment and leisure activities (such as eating out). Some macroeconomic data ...

Central America Outbound - Central America

"Affordability and convenience are key factors determining destination choice and so the bulk of outbound travel takes place within the Americas, dominated by Central America itself. Distances between Central American countries are not huge, allowing citizens to travel by land with ease. Low-cost airlines have been a growth catalyst in ...

Color Cosmetics - Brazil

"The Brazilian consumers seem to be more aware of the color cosmetics they use. Products with sun protection, hypoallergenic, and not tested on animals are well regarded when shopping. In addition, they have been demanding attractive colors and finishing, as well as special promotions and experimentation of the product, at ...

Consumer Payment Preferences - UK

"The payments space is constantly changing, but payment preferences are much slower to adjust. Contactless has finally taken off to an extent, with growth now limited primarily by the willingness of retailers to accept it. Preferences for traditional payment methods, as well as concerns about security, are currently holding smartphone ...

Dentistry - UK

"‘Skill mix’ has helped free up the time available to general dental practitioners, which can then be used to fulfill more patient appointments and increase the time allocated to private work."

Digital Trends - China

switching."

– Alyson Parkes, Research ...

Chocolate Confectionery - China

"Chinese consumers primarily consume chocolate to enhance the mood rather than as a snack, so making chocolate more snack-like should potentially expand the usage. Manufacturers can include popular healthy snack foods such as nuts, dried fruits, or puffed grains to not only add flavour and health benefits to the product ...

Consumer Attitudes towards FinTech - Canada

"Awareness of some of the newer digital products is still fairly low so companies offering these products need to explain to Canadians how these products can simplify their financial lives."

Cookware - US

"Cookware sales have remained slow amid high household penetration, yet steady growth is likely attributed to consumers' generally positive attitudes toward cooking and baking at home. While adults find health and creative benefits to the process, there is interest in furthering their skills in the kitchen and expanding their inventory ...

Deposit and Savings Accounts - UK

"Savers are having a grim time, with an ultra-low base rate and rising inflation making it near-impossible to achieve a real return. The introduction of funding schemes by the Bank of England has also reduced banks' reliance on retail deposits, removing the pressure to aggressively compete. Many savers, therefore, are ...

Estilo de Vida dos Brasileiros - Hábitos de Gastos do Consumidor - Brazil

“Consumers are more selective and have higher requirements on compelling features of digital products, but this does not stop them from trying new, innovative but less mature technologies, eg smart home appliances. Multiple functions and portability are two main purchase triggers. Interestingly, not many people would buy digital products just ...

European Retail Briefing - Europe

Analyst comment on Steinhoff and its future prospects.

Food Packaging Trends - US

"An increasing percentage of product launches are based primarily on new packaging as packaging continues to become more important in the food marketing mix. Not only does packaging play a central role in communicating key benefits and features, it can also help to shape a consumer's experience with the product ...

Fruit - US

"The fruit market continues to experience sustained growth due to its near universal consumption and an increased interest in healthy fresh snacks among consumers. Though the fruit market as a whole is growing, the canned/jarred fruit segment faces year-over-year declines as consumers perceive these products as too processed and ...

Holiday Car Hire - UK

“Consumers still want to go on holiday abroad, evident from reports of strong bookings in the first half of 2017. However, many will be cutting back on expenses because of the weak Pound. This will likely mean that people will cut back on car hires. However, rental brands can encourage ...

Ice Cream - China

“O desemprego ainda está afetando grande parte dos brasileiros, o que os leva a mudar e adaptar seu comportamento de compra durante a crise atual. Apesar de se programarem para pagar dívidas e economizar para o futuro, muitos consumidores ainda declaram gastar dinheiro extra com atividades de entretenimento e lazer ...

Fashion Online - UK

“As consumers have become more accustomed to shopping for fashion online their expectations have been raised and retailers will have to invest more in the online shopping experience to drive sales. Delivery is becoming a key online battleground and the use of delivery passes and more dynamic delivery options could ...

Frequent Travel Programs - US

"The travel market continues to benefit from a strong US economy and continued interest in travel. Many adults are enrolled in a frequent travel program, with frequent flyer and hotel loyalty/rewards programs boasting the highest memberships. As travel loyalty programs innovate to provide a wider variety of ways to ...

Gambling Review - UK

“The UK's retail gambling market faces some potential headwinds to sustained spending growth but can limit that impact by tapping into younger demographics' growing interest in particular modes of play.”

– David Walmsley, Senior Leisure Analyst

Holiday Rental Property - UK

“There are significant opportunities for the incorporation of value-added products beyond basic bricks-and-mortar accommodation, and better integration of property rental within a more holistic holiday experience – in the shape of extra services within the property as well as activities (provided by professionals or peer-to-peer networks) within the destination itself ...

In-store Bakeries - US

“The challenges from non-retail channels urge ice cream manufacturers to bring more excitement, by emphasising naturalness and authenticity. In the meantime, consumers are still looking for indulgence, which should not be compromised. There is scope for ice cream as a mood food with a premium price, to sooth the stressful ...

Luxury Cars - China

“It’s been a trend for luxury car brands to introduce compact models targeting young car buyers with the hope of boosting sales. This strategy works for customisable car models under big names with pleasing appearances. While for brands that are still cultivating the market, it is critical to reinforce the ...

Marketing Financial Services - US

“The financial services industry is changing rapidly, and there are more alternatives to traditional institutions and traditional ways of transacting business than ever before. However, the industry is still struggling with trust, and institutions are searching for ways to overcome those issues and build loyal, long-term relationships with their customers ...

Marketing to Hispanic Millennials - US

“The Hispanic Millennial generation is aged 23-40 in 2017 and accounts for the largest share of the Hispanic population. Moreover, 21% of all US Millennials are of Hispanic origin. The majority of Hispanic Millennials are bilingual and bicultural and want to fit in both the American and the Hispanic world ...

Marketing to Mintropolitans - China

“Despite their strong self-confidence and positive attitude towards future, Mintropolitans are more emotionally stressed than the rest of consumers. They acknowledge the importance of purchasing ethical brands, but the underlying reason is less of an altruistic act but more about self-protection from increasing pollutions.”

“Sales at in-store bakeries continue to rise. Even as consumers indicate they are seeking healthier foods, they are clearly open to the occasional indulgence, and in-store bakeries are poised to capitalize on consumer interest in higher-quality baked goods that the consumers may feel uncomfortable, unwilling, or unskilled enough to make ...

Maquiagem e Esmalte para Unhas - Brazil

“As consumidoras brasileiras de maquiagem e esmalte para unhas parecem estar mais atentas aos produtos que utilizam. Produtos com proteção solar, hipoalergênicos e que não tenham sido testados em animais são fatores importantes na hora de escolher qual cosmético usar. Além disso, elas estão exigentes nos canais de venda, citando ...

Marketing to Black Millennials - US

“Black Millennials are a diverse group, across age, educational attainment, family structure, and income, all of which impacts how they see themselves and their worldview. While diverse within themselves, there are similarities among them as a group that reveal what they believe about their future and how they interact within ...

Marketing to Millennials - US

“The Millennial generation is aged 23-40 in 2017, with many on the precipice of major life decisions. As this generation contemplates buying a home, getting married, and having children, these lifestyle changes will likely have them reconsidering their purchase habits. At this stage, Millennials provide fertile ground for marketers looking ...

Meal Occasions - Brazil

“Despite being cheaper, consumers also cook at home in order to eat healthier and control what goes into their dishes. Brands could step in and educate Brazilians on how to cook in a healthy and cost-effective way.

– Alina Ma, Senior Research ...

Men's Facial Skincare - UK

"The men's facial skincare category shows evidence of having reached its peak, with a plateau in value in 2016 and an estimated decline in 2017. With NPD falling, there is little to entice new users to enter the sector, whilst low usage frequency amongst existing users is further stifling the ...

Mobile Phones - US

"From 2013-16, over 200 million phones sold in the US annually, and Mintel estimates that sales will stand at a record of 204 million units in 2017. Phone manufacturers have successfully and consistently driven upgrades via superior cameras, 4G (fourth-generation wireless network) chips, faster CPUs (central processing units), improved graphics ...

Online Shopping - US

"Online sales are growing, with positive sales expected through 2021. Nearly all consumers have some form of internet access in their household, so new users will likely come from convincing shoppers to do more of their shopping online. Many consumers are already doing some online shopping, but five specific channels ...

Oral Care - US

"In a category with slow but steady sales growth and high penetration, factors such as brand, benefits, and costs have the greatest influence in purchase decisions. To maximize growth potential, stakeholders should leverage a need for sensitivity products, products offering a variety of benefits, and natural positioning."

– Jana Vyleta, Health ...

Perceptions of Auto Brands - US

"Brand perception for automotive companies is critical to success since consumers are so infrequently in the market for a vehicle. Past experiences, reputation, and

Menu and Ingredient Insights - Ireland

"The advancement of on-demand delivery apps coupled with a more travelled consumer has resulted in increased expectations when it comes to what's on the menu. Recommendations from friends/family members is the most influential factor for experimenting with new cuisine eaten in the home), however, Mintel sees scope for food ...

Ocasões de Refeições - Brazil

"Além de ser uma atividade mais barata, os consumidores também cozinham em casa para ter uma dieta mais saudável e controlar o que comem. As marcas podem participar desse processo educando os brasileiros sobre como cozinhar de forma saudável e econômica."

– Andre Euphrasio, Analista de Pesquisa

Online Travel Aggregators - UK

"The consumer journey in travel is not linear but rather cyclical, with consumers' past experiences feeding through to and influencing their next decisions as well as those of other consumers. Referral programmes and social media competitions that encourage users to tell their friends about a travel brand can thus help ...

OTC Pain Management - US

"A majority of consumers turn to some form of OTC (over-the-counter) pain management product to treat pain, with internal analgesics remaining the dominate choice for pain relief, though external analgesics continue to experience faster growth. Looking forward, consumers' need for pain treatments is not expected to change, and a preference ...

Petcare - UK

"People indulge their pets, including them in celebrations, buying them gifts, stylish accessories and toys. Humanisation of pets is also extending to include

word of mouth are crucial factors that play a role in shaping consumers' choices before they even decide on what to purchase. For success in the ...

Private Healthcare - UK

"With the UK population becoming more aware of available healthcare options, patients increasingly want to be involved in decisions about their healthcare and the services they are likely to use or not. This is why insurers and hospital providers must offer flexibility to each individual so they feel they are ...

RTD Alcoholic Drinks - China

"China's RTD alcoholic drinks market is estimated to be slowly recovering in 2017 in both volume and value sales from its significant fall in 2016. Companies and brands were relying too much on marketing and ignoring the products per se, which contributed to the market's sudden rise as well as ...

Snack, Nutrition and Performance Bars - Canada

"The snack bars have experienced growth. This is undoubtedly spurred on by snacking's growth and a heightened demand for flexible food options that can be eaten when and where people want. As consumers live in an age where they can carry the contents of their lives wherever they go, snack ...

Soft Drinks Review - UK

"The major focus of the soft drinks market in recent years has been on sugar reduction, in response to consumer concerns about sugar and more recently in preparation for the introduction of the Soft Drinks Industry Levy. Sugar is not the only health factor influencing the market though, with a ...

Teen and Tween Gaming - US

"An overwhelming majority of teens and tweens aged 10-17 have played video games in the last three months. A majority of them are not beholden to any one gaming device or genre of video game. While girls are significantly more likely to enjoy games typically found on mobile devices, boys ...

fitness monitors that make sure the pet is getting the exercise it needs as well as performance accessories, such as cooling jackets, for active dogs. Plus, in ...

Residential Windows & Doors - UK

"The wide range of factors affecting demand for windows and doors in the residential sector tend to lead to strong growth when the economy is performing well, and more challenging times when the economy declines or stagnates. The market therefore tends to exaggerate economic fluctuations, and there will be strong ...

Shopping Locations - UK

"Vacancy rates at retail parks are at their lowest level in years, as the discounters rapidly snap up space. However, there has been a notable rise in young people shopping at the major centres over the last year, reflecting the shift to inner city living, and we wonder if the ...

Snacking in Foodservice - US

"The definition of a snack can vary from person to person and without a clear direction to follow, foodservice operators can position snacking from a variety of angles. With more consumers adopting a snacking mentality, foodservice operators need to determine how they can design a menu that offers flexibility in ...

Soup - US

"The soup category continues to struggle, driven by sales declines in RTS (ready-to-serve) wet and condensed soup. Despite the maturity of the category there are opportunities for growth. Refrigerated soup may find continued success, as consumers are ditching the center of the store for the perimeter in hopes of finding ...

Teens' and Tweens' Technology Usage - UK

"Mobile devices are the focal point of teens' and tweens' technology use. Smartphones are firmly on top with eight out of 10 children using them, with tablets edging out laptops for second place. Along with this has come a

high degree of engagement, with mobile-focused social media networks Instagram and ...

Term Assurance - UK

“Sales of term assurance rose in 2016, as the market is starting to see more innovation across new product types, distribution channels and underwriting. However, life insurance continues to be low down in consumers’ list of priorities, making it hard for insurers to engage with potential customers.”

Travel Retail - UK

“The ongoing investment into some of the UK’s largest travel hubs is changing the face of travel retail and presenting retailers with new opportunities to enter the market. Whilst food remains the primary reason to shop in a travel hub, the ongoing development of the sector will only help to ...

Warehouse Clubs - US

“Warehouse clubs have been successful of convincing a large amount of people to pay an annual fee to shop at their stores. Sales continue to increase YOY (year-over-year) and the forecast ahead looks bright. These consumer advocates find that, based on their shopping habits and needs, the value they receive ...

Women's Clothing - Canada

“Prioritizing comfort over style, Canadian women enjoy the clothes shopping process and are highly engaged. However, a conservative mindset towards discretionary spending means that consumers lean more towards retailers that are perceived to offer the best value. The tendency remains skewed towards buying clothes from physical stores, as fit continues ...

Workplace Pensions - UK

“Whilst consumers clearly recognise the importance of paying into a workplace pension, many do not translate their attitudes into actions. Providers and employers may need to do more to incentivise employees to plan for retirement.

The European Leisure Travel Industry - Europe

“The major European leisure travel companies like TUI and Thomas Cook are moving away from being mere intermediaries towards being travel-service providers, notably of own-branded hotels and cruise ships.”

- Jessica Kelly, Senior Tourism Analyst

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.

Waste Management and Recycling - UK

“The UK waste management industry continues to strive for sustainability in line with the gradual realisation of a circular economy. Impetus around this ambition is expected to remain despite the uncertainty introduced to policy and trade by Brexit.”

– Marco Amasanti, B2B Analyst

Women's Facial Skincare - UK

“No longer using wipes and moisturisers to solve every issue, women are discovering the benefits of cleansing, cleaner living, and high-quality products on their skin. A new focus on natural radiance has distracted women from other concerns such as ageing, creating a need for brands to step in and remind ...

冰淇淋 - China

“来自非零售渠道的挑战迫使冰淇淋生产商通过强调天然和成分真实为市场注入更多新鲜刺激。与此同时，消费者也仍然看重纵享时刻，因此这方面不能妥协折扣。冰淇淋有机会成为心情食品溢价销售，舒缓年轻一代的紧张生活。”

Promisingly for firms, consumers show a willingness to engage, with many keen to receive regular ...

巧克力 - China

“中国消费者吃巧克力主要是为了提升心情，而不是当作零食，因此，推出更像零食的巧克力应会增加消费量。厂商可在巧克力中添加坚果、水果干或膨化谷物等消费者喜爱的健康零食食品，这种方法不仅能丰富产品口味和带来健康益处，而且也能天然降低巧克力的脂肪和糖含量（这两方面是消费者的主要顾虑）。”

— 杨晴，高级研究分析师

豪华车 - China

“豪华车品牌瞄准年轻购车者推出紧凑车型以期刺激销售已经成为趋势。对于大牌车厂旗下设计感强、定制化程度高的车型，该策略屡试不爽。对于还在培育市场的品牌，强化精湛做工和血统纯正的品牌形象则至关重要。”

— 过人，高级研究分析师，中国

针对英敏特城市精英人群的营销 - China

“尽管英敏特城市精英人群对未来更积极自信，但该群体也有更大的情感压力。他们认识到了购买道德品牌的重要性——但这并非出于利他主义的精神，而更多是希望保护自己免受污染之害。”

— 倪倩雯，食品和饮料研究分析师

数码趋势 - China

“消费者对判断数码产品能否吸引人变得愈加挑剔。但这并未阻碍他们去尝试新奇有创意、但尚未成熟的科技（如智能家居产品）。多功能和便携性是触发购买的两大主要因素。有趣的是，只为炫耀而购买数码产品的消费者并不多。”

— 马子淳，高级研究分析师

身体护理用品 - China

“中国身体护理市场长期以来都是以滋润为主，创新乏力。但消费者需要的不仅是滋润，因为她们渴望身体皮肤能实现多种不同的改善。尤其是高收入者，她们已经开始使用高级产品，如身体护理精油，而不是基础的身体滋润产品。考虑到消费者还不熟悉专业产品，品牌因而需要证明其产品功效，教育消费者在身体护肤流程中加入更多类型的产品。”

— 李玉梅，研究分析师

预调酒精饮料 - China

“经历了2016年的大幅下滑后，中国预调酒精饮料市场的销量和销售额预计在2017年将缓慢回温。导致市场大起大落的原因主要是公司和品牌太依赖市场营销，却忽略了产品本身。口味和原料应是预调酒精饮料未来创新的主要方向。女性消费者仍是主要的目标消费群体，但除了常见的果味产品外，更多的面向女性的预调酒精饮料（如采用具有健康和美容功效的独特原料制成）可能会为新品研发带来灵感。”