

April 2017

American Lifestyles: Finding Common Ground - US

"Americans may be questioning what lies ahead with a new administration in the White House, but any uncertainty they may have hasn't significantly changed their outlook on spending. Most agree that their financial situations will stay the same, or even improve in the next 12 months. Even with a majority ...

Automotive Innovations - US

"The automotive industry has seen a flurry of recent technological advancements that improve safety, connectivity, and convenience for consumers. The industry has made advancements in autonomous ability that advances safety and implements preventative protection measures. Features like forward collision avoidance, lane-keeping assist, and adaptive cruise control have made their way ...

Baby Food and Drink - UK

"Seeds of change – which could revolutionise the baby food and drink retail landscape – have been planted by the discounters. 2016 saw Aldi extend its offering dramatically and Lidl make its first venture into this category. If this evolving presence is well-received by parents this could curb future price ...

Betting Shops - UK

"Will the party soon be over for betting shop gaming machines? Investment in new sports betting technologies looks increasingly important in helping bookmakers lessen the impact of any forthcoming regulatory hit."

— **David Walmsley, Senior Leisure Analyst**

Canadian Lifestyles: Pride and Purse Strings - Canada

"Consumers continue to hold a conservative mindset when it comes to spending owing to concerns around the current economy and their ability to save for the future. However, as the majority of Canadians perceive

Automotive Innovations - Canada

"The automotive industry has witnessed a burst of recent technological advancements that improve safety, connectivity and convenience for consumers. The category has created innovations in autonomous (self-driving) capabilities that progress safety features and implement preventative protection measures. Features such as forward collision avoidance, lane-keeping assist and adaptive cruise control have ...

Automotive Retailing - Ireland

"The Brexit's effects can already be felt on both sides of the borders, with new car registration levels in the year to date down compared to 2016. Further to this, the shift in the £/€ exchange rate has seen a surge in RoI consumers importing used cars from NI ...

Balkans Outbound - Balkans

"Rising economic prosperity in the Balkan region has had a positive impact on the outbound travel market. Outbound tourism from Bulgaria and Romania expanded by over 20% between 2011 and 2015, driven by stronger economic growth and rising disposable incomes."

— **Jessica Kelly, Senior Tourism Analyst**

Buy-to-let Mortgages - UK

"The buy-to-let market has been rocked by rule changes in the last two years, with little opportunity to adapt before the next change takes place. It will be some time before the market can settle and lenders can bring a fresh approach to the challenges presented by tighter controls. Remortgages ...

Car Purchasing Process - UK

"Car sales reached an all-time high in 2016. While this is good news for those involved in this sector, and a reflection of the efforts to stimulate new car sales in recent years, there are many reasons to be concerned

their financial situation to be stable, there is some wiggle room to be had for small ...

Carbonated Soft Drinks - US

"The CSD (carbonated soft drink) market continued to struggle from 2015-16, with sales falling and effective stagnation forecast through 2021. While the vast majority of consumers use CSDs, the mature market is struggling to grow as users seeking more-healthful options cut back and turn instead to BFY (better for you) ...

Consumer Attitudes towards Functional Drinks - China

"Not all consumers need an intense and immediate energy shot. Instead, some may just need a slight energy kick to enhance their mood. Therefore, a one-size-fit all approach in energy drinks could limit a brand's consumer penetration. Lighter versions of energy drinks have good potential to increase usage, especially among ...

Convenience Store Retailing - Ireland

"The convenience retailing market is set for growth as top-up shopping seems to fit well with the busy lifestyles of Irish consumers. In line with this, c-store retailers have replicated Applegreen's success in creating added value through the addition of food franchises in-store. This trend is set to continue over ...

Cookies, Cakes and Sweet Goods - Canada

"Sweet baked goods are engrained into the Canadian diet. Indeed, donuts are up there with the most Canadian of foods along with peameal bacon and maple syrup. Despite this, challenges nevertheless exist. One barrier for consumers is health. While it may not prove credible to position sweet baked goods as ...

Cuidados com o Cabelo - Brazil

"A tendência do cabelo natural parece não ser ainda muito representativa da população brasileira feminina. O estilo usado na maioria das vezes pelas mulheres

about the next few years. Numerous factors appear set to ...

Construction - UK

"Just when the construction market was demonstrating strong growth following the economic disruption of the recession, the UK decided to negotiate an exit from the EU. This has created an unusual level of economic uncertainty, and construction prospects have consequently become even more sector-specific than normal."

Consumers and the Economic Outlook: Quarterly Update - US

"With a new administration, a growing economy, and a relatively healthy jobs market, this Report addresses how consumers are feeling about their current financial situation. Through a series of questions that will be asked throughout 2017, Mintel has aggregated consumer opinion on their current finances, how they hope to improve ...

Convenience Stores - UK

"The convenience retail sector has enjoyed a strong period of growth but for the first time in a number of years there are clouds on the horizon. Rising food inflation is likely to see greater scrutiny placed on the price premium often associated with convenience stores."

– Nick Carroll ...

Cough, Cold, Flu and Allergy Remedies - US

"US sales of OTC cough, cold, flu, and allergy remedies have had healthy growth for the past few years, yet slowed from 2015-16. A mild cold/flu season, effective flu vaccines, and more moderate success in Rx-to-OTC switches is likely to have tempered market growth. Mintel expects growth to continue ...

Digital Trends Spring - UK

"The smartphone market can no longer rely on new owners for revenue growth, particularly as new entrants are now most likely to be over-55s, who are usually more

ainda é o liso: 48% afirmaram isso. Cabelos que caem muito, sem brilho ou com muito volume são alguns dos problemas citados pelos entrevistados".

– Juliana ...

European Retail Briefing - Europe

Analyst comment on conglomerates in retailing.

Footwear Retailing - Europe

"There are major shifts taking place in the footwear market, as the non-specialists grow their share of spending, while the traditional out-of-town footwear format has been thrown into question. With the market becoming increasingly competitive, the footwear specialists need to find ways to differentiate themselves, whether through elevated service, standout ...

Footwear Retailing - Germany

"The footwear specialists dominate the market in Germany, and grew well ahead of spending on footwear in 2016. Those that have recognised the need to digitise their business have performed particularly well, however there is still much to be done by the specialists to tap into the rising demand for ...

Footwear Retailing - Spain

"The specialist retailers are rapidly losing share of footwear spending, as the sports stores cement their position as a popular place for buying footwear. Tapping into rising spend on footwear online presents one avenue for growth, while focusing on catering for older shoppers, who are most driven by quality and ...

Frozen Snacks - US

"Frozen snacks' market size has remained remarkably consistent at just under the \$5 billion mark for several years and is forecast to maintain that level for the foreseeable future. Whether that is stability or stagnation, the category continues to resonate with

price sensitive. This means that, more than ever, handset manufacturers need to provide existing smartphone owners with compelling reasons to upgrade their ...

Facial Masks - China

"Brand loyalty in the facial mask category is not strong. What's more concerning is that such brand switching is not driven by dissatisfaction with the current brand or promotional activities, but rather the consumer desire to try out different new products, indicating the importance of innovative products rather than marketing ...

Footwear Retailing - France

"The French footwear specialists are in trouble. Some have been growing, but many of the established names on the high street and out-of-town are in decline. The market is oversupplied with retailers and the traditional players are struggling to give consumers reason to choose to shop there. We think there ...

Footwear Retailing - Italy

"Italian footwear retailers have been performing well, but competition is intensifying from the expansion of the fast fashion chains and from online pureplayers. The opportunities lie in modernising footwear retailing and in selling online. The domestic retailers need to ensure they keep up in both these regards if they are ...

Footwear Retailing - UK

"Fit remains a big issue in footwear, with many people wanting more retailers to offer help to find better fitting shoes. Wearable technology has become increasingly apparent in the footwear sector and it has the potential to revolutionise the future of footwear as smart shoes look to improve fit as ...

Hair Colourants - UK

"The hair colourants category has fluctuated in value in recent years as temporary colour products, which are typically priced lower than permanent products, continue to boom in popularity. Consumers are also showing a more relaxed approach to colouring, with

young consumers and families, but these consumers may well ...

Haircare - Brazil

“The natural hair trend does not seem to be significant among Brazilians. The hairstyle most often used is still straight: many of the people interviewed agree with that. Hair that falls out a lot, hair without shine, and hair with a lot of volume are some of the problems mentioned ...

Handbags and Accessories - US

"Consumers remain cautious when it comes to spending their discretionary income, and for most, handbags and accessories aren't at the top of the priority list. In fact, consumers are buying fewer accessory items and/or shifting toward more affordable options instead of designer labels. Young, urban, and upscale consumers represent ...

Hispanics' News Consumption - US

Hispanics enjoy following the news. However, since Hispanics' lives tend to orbit around content consumption and the competitive landscape is becoming increasingly fragmented due to the internet, news providers need to find ways to stand out and appeal to Hispanic consumers. Gaining and maintaining their trust is key.

Legal Services - UK

“While the current market outlook carries a higher degree of uncertainty following the Brexit vote, the UK legal services market will remain intensely competitive and face continued price pressures. The trend towards unbundling legal instructions will also continue, further eroding the margins previously available for traditional legal services providers.” ...

Major Domestic Appliances - UK

“Few consumer sectors enjoy the pace of innovation and change that characterises the market for major domestic appliances. Better functionality, better energy efficiency

colourant users extending the longevity of their colour as well as ...

Hand, Body and Footcare - UK

“Consumers are growing bored due to less innovation and advertising spend in hand, body and footcare. The prestige sector should copy professional treatments as the trade down from premium to mass brands accelerates, or partner with fashion and social media. Basic consumers care about skin comfort and relief. Brands can ...

Hard Surface Cleaning and Care - UK

“The dominance of multipurpose cleaners, a lack of product development and reduced advertising spend have created a perfect storm for the hard surface cleaners category, which continues to struggle to show growth despite the rising population and number of households. However, with discounting and product promotions reaching a plateau, growing ...

Ice Cream - US

Retail sales of ice cream and frozen novelties reached \$12.8 billion in 2016, reflecting a 3.6% year-over-year increase. Market growth has been driven by positive sales performance in the two largest segments: ice cream/frozen dessert and frozen novelties. These segments are seen as offering rich, indulgent treats ...

Made to Order Smoothies - US

"Within the smoothie category, certain legacy elements remain a key area of focus for consumers, such as a focus on fruit and traditional bases like yogurt and dairy milk. However, functional health trends in the beverage space are driving the category forward and creating new areas of opportunity. The variety ...

Marketing to Older and Younger Millennials - UK

“While Millennials have been at the forefront of a physical health revolution in recent years, their mental

and water savings rank among the advances in recent years and this has transformed choices. But arguably the greatest change is poised to take off as suppliers ...

Mattresses - US

"The mattress category has undergone significant change in recent years due to new product segmentation, changing consumer needs, and e-commerce sales. Mattress purchasers are primarily quality driven, especially as sleep becomes a health priority. Brick-and-mortar retailers benefit from the preference among shoppers to try out a mattress before buying; however ...

Mobile Phones - UK

"In the context of a slowing smartphone market, manufacturers' upgrade programmes can help gain valuable control of the smartphone distribution market, which has thus far been mostly in the hands of operators and specialist retailers. Moreover, such programmes can increase switching costs and further foster brand loyalty by leading customers ...

Nappies and Baby Wipes - China

"Even though baby care products retailing is seeing the trend of moving to online, specialised mother and baby care store is still the most trusted and most often visited channel for Chinese mums, even for highly standardised and repurchased products like nappies. This indicates in-store experience and professional services are ...

Nutrition and Performance Drinks - US

"Mintel forecasts the nutritional and performance drink category to continue modest growth into 2021. While the category benefits from consumers' focus on a healthy lifestyle, a wide array of food and drink categories are stepping up the pressure by adding similar functional and health elements. The category may benefit by ...

On-trade Soft Drinks - China

"Multiple healthy ingredients are the essential purchase driver of on-trade soft drinks. Fruit- and milk-based blended smoothie can harness an opportunity as they

health has fared less well. A growing number of studies have cited social media as the dominant factor behind the generation's self-esteem crisis; however, their ardent usage of these platforms suggests that they ...

Millennials and Finance - US

"As Millennials continue down their financial journey, reaching this group will require going beyond generational marketing to target these consumers within their specific life stage. Millennials are between the ages of 22 and 39 (turning 40 in 2017) and, as such, represent a mixed group of consumers, experiencing a number ...

Mortgage Advice - UK

"The mortgage advice market is in a strong position. The MMR means that those looking for a mortgage almost always need to take advice, while the strong demand for mortgages means this captive audience is regularly replenished. However, digital innovation, from both major lenders and disruptive start-ups threaten to put ...

New Energy Cars - China

"The new energy car market in China is steering from policy-driven to consumption-driven, even though it will be facing a short-term challenge after the subsidy cut. Pure electric passenger cars will meet greater success in the future but plug-in hybrid is still the most popular choice for now. Opportunity lies ...

Occupational Health - UK

"The uptake of occupational health services in the workplace will be largely driven by how certain economic factors progress over the coming years. Organisations will benefit from proactively developing policy, training and support programmes that recognise the needs of employees with longterm conditions."

– Lewis Cone, B2B Analyst

Package vs Independent Holidays - UK

"At the moment, consumer appetite for holidays shows no sign of dampening, despite the weak Pound and

are the most preferred ingredients. At the same time, restaurants and beverage manufacturers may also want to utilise natural ingredients to create strong sensorial appeal to attract ...

Personal Care Consumer - US

"Despite the high market penetration of personal care products, there are opportunities for growth. While consumers are price sensitive when shopping, factors that influence consumer purchases including scent and product functionality could increase spend. To entice consumers to trade up to more expensive products, financial incentives that minimize risk, such ...

Potable Water and Sewerage - UK

"In 2015/16, the first year of the new five-year asset management period AMP6, gross capital expenditure across the water and sewerage industry was recorded at £4.45 billion. The figure is not directly comparable to previous years due to changes in reporting categories, but capital expenditure is still believed to ...

Retailer Loyalty Programs - US

"Participation in retailer loyalty programs is high, but inconsistent across channels, with consumers engaging the most at retailers where they can fulfill more shopping needs, such as drug stores and supermarkets. Conversely, specialty retailers' programs have the lowest levels of engagement and, in some cases, awareness. As consumers' shopping habits ...

Seasonal Shopping (Autumn/Winter) - UK

"The autumn seasonal events continued to rise in value during 2016, in line with the fairly positive consumer sentiment and willingness to spend. With the retail market facing a challenging 2017, it is difficult to predict whether spending on these events will be significantly impacted. Back-to-school sales should remain resilient ...

Shaving and Hair Removal - US

"The shaving and hair removal market continues to struggle due to a highly saturated landscape as well as consumers taking a value-driven mindset to shopping the category. Estimated 2016 sales of \$3.8 billion

reports of economic uncertainty on the horizon. However, holidaymakers will be looking for safety after the collapse of a number of travel companies, as well as ways to make their money go further ...

Personal Pensions - UK

"The individual personal pension market offers good prospects for growth. A larger pool of pension savers due to auto-enrolment and prevailing mobility in the labour market will increase the tendency to accumulate multiple pension pots. In turn, this will drive pension transfer and consolidation activity. Moreover, there is scope to ...

Regional Tourism - US

The travel market remains strong as tourism spending by both Americans and international travelers grew by 8% from 2011-16 to reach an estimated \$944.2 billion. The market is forecast to grow by an additional 20% over the next five years, to surpass \$1 trillion by 2021. While transportation accounts ...

Salty Snacks - US

"The salty snacks market continues to grow thanks to the strong performance of meat snacks and popcorn, as well as the continued success of corn snacks and cheese snacks. While salty snacks face competition from a variety of different snacks, innovation propels the salty snack market forward. Brands can build ...

Shampoo, Conditioner and Hairstyling Products - US

"The mature shampoo, conditioner, and hairstyling products market has posted steady growth, driven by gains in the larger shampoo and conditioner segments, allowing the market to overcome struggling sales of hairspray and hairstyling products. However, concerns over damage and preferences for simplicity have left consumers skipping daily washing, creating longer ...

Snack, Nutrition and Performance Bars - US

"The snack, nutrition and performance bars category has turned in solid performance in recent years as

represent a 3% decrease from 2015, as consumers opt for lower-priced options and turn to retailers ...

Sports Nutrition - Ireland

"Recognising the health benefits of regular physical activity, Irish consumers are exercising two to three times a week. This points to a strong market for sports nutrition brands to target and focusing on how their products aid rapid recovery between frequent exercise will pique active Irish consumers' interest and encourage ...

The Chinese Consumer - China

"Consumers have become more conservative spenders from seeing the slowing economy and feeling more pressure both from work and financially. Meanwhile they are eager to live a healthier and more exciting lifestyle. This requires them to learn and become smarter shoppers – being able to gauge a product's quality and ...

The Leisure Outlook - UK

"Overall almost all the leisure activities covered have seen increased visitation over the last 12 months which is good news for the industry. It is hard to predict what Brexit will mean in terms of consumer behaviour but it does appear that it is driving more cautious spending and not ...

Toilet Cleaning, Bleaches and Disinfectants - UK

"Dettol's launch of a spray format has added versatility and convenience to disinfectants, and has rejuvenated the segment as a consequence. Prominent product launches and advertising campaigns from Bloo and Duck have also shown that there is potential for value growth within the toilet cleaning segment, despite an overall decline ...

UK Retail Rankings - UK

consumers have grown more interested in healthier, more nutrient-dense snack foods. Opportunities exist for brands that explore new flavors and textures and that emphasize natural and unprocessed ingredients."

Tea Infusions and Tea Drinks - China

"The rising health awareness of consumers in China has driven consumption increase in tea infusions and RTD tea drinks markets. However, tea infusions face the challenges of attracting women and younger consumers; tea drinks face the challenges of demand for authenticity, relatively lower consumption frequency, and threat from similar healthy ...

The German Hotel Sector - Germany

"In contrast to the US or France, where the economy hotel sector is relatively saturated, there are still bright days ahead for this category of lodging in Germany. In fact, this sector of accommodation has become more segmented in Germany, which has traditional economy players like AccorHotels, but also 'cheap ...

Theme Parks - US

"Theme park revenues are forecast to increase more rapidly over the next five years. Rising attendance and per capita spend help spur growth. While Disney and Universal dominate the market, nearly all other major theme park companies are showing positive results. Visitors seek a balance between familiar attractions and new ...

UK Retail Briefing - UK

An Analyst comment on Food retailing and the recent trading updates by the grocery multiples and what it means for the sector.

Vitaminas e Suplementos - Brazil

The retail industry has seen strong demand over the last six years. There has been compound annual growth of 3% and most of that has been volume growth as there has been minimal inflation for much of the time and deflation in some sectors, especially food. In fact average ...

Vitamins and Supplements - Brazil

“Vitamin, mineral, and supplement brands can benefit from reminding consumers of how, despite their best efforts, they may be falling short with nutrition, but can turn to these products for a solution.

Blurring with food and drink as well as using healthy and natural ingredients in product formulations can also ...

婴幼儿纸尿裤和湿巾 - China

“婴幼儿护理产品零售呈现转向线上的趋势。但是，即便是在购买纸尿裤这类高标准化和可重复购买的婴幼儿产品时，母婴用品专卖店仍然是中国妈妈们最信赖和最常使用的渠道。这表明，店内体验和专业服务依然是妈妈购物过程中至关重要的一部分。品牌和零售商需要在各渠道间取长补短，打通线上线下，提供无缝购物体验。”

新能源汽车 - China

尽管政府补贴力度下降，短期内将面临挑战，但中国新能源汽车市场正逐渐由政策主导转向消费驱动。纯电动乘用车的未来前景更广阔，但插电式混合动力车仍是目前最受欢迎的选择。厂商和品牌可通过与居住在二/三线城市、对新能源汽车感兴趣但还犹豫不决的25-29岁中低收入消费者进行有效沟通来把握商机。”

面膜 - China

“面膜品类并不具有强烈的品牌忠诚度。更值得关注的是，这种品牌转换并不是因为对当前使用的品牌不满或被促销活动吸引，而是消费者想要尝试不同的新品，揭示出产品创新占据比市场活动更重要的地位。”

— 金乔颖，研究副总监

"Marcas de vitaminas, minerais e suplementos podem se beneficiar se conscientizarem os consumidores de que, apesar de seus melhores esforços, é provável que não estejam consumindo todos os nutrientes que necessitam, mas que podem solucionar este problema com os produtos da categoria.

As vitaminas e suplementos podem se aliar a ...

中国消费者 - China

“经济放缓以及工作和财务压力导致消费者越来越趋向保守开销。同时，他们也渴望更健康和更精彩的生活方式。这就要求他们不断学习并成为更明智的消费者——在购买前能判断产品的质量和性价比，以实现预算最大化来享受生活方式的升级——他们希望同时拥有健康的体魄和愉悦的心情，会通过寻求更健康的饮食和更具体验性的娱乐活动来达到这些目的。”

— 顾菁，研究总监

对功能性饮料的态度 - China

“并非所有的消费者都需要高浓度和效果明显的能量补充饮料。相反，有些人可能只是需要补充轻微的能量来提升情绪。因此，单一强效型的能量饮料可能会限制品牌的消费渗透。提供较轻型的能量饮料很有机会能提高消费者的饮用频度，特别是针对目前较少饮用能量饮料的女性和年轻消费者族群。”

现泡茶和即饮茶 - China

“中国消费者的健康意识不断增强，带动了现泡茶和即饮茶饮料市场销售量的增长。然而，现泡茶面临着如何吸引女性和年轻的消费者的挑战，而茶饮料的挑战来自消费者对正宗性的要求、较低的饮用频率和瓶装水和果汁等类似健康品类带来的竞争。当今市场中，消费者在居家场合饮用更多现泡茶，而在户外场合饮用更多即饮茶饮料。探索更多消费场合，突出茶或茶饮料的新鲜度和正宗性，瞄准对具体的产品功能有需求的消费者——或将助力市场未来的发展。”

— 李蕾，研究分析师

餐饮娱乐渠道软饮料饮用趋势 - China

“餐饮娱乐渠道软饮料的核心购买动因是含有多种营养成分。水果和牛奶是受欢迎的饮料成分，所以用水果和牛奶调制的奶昔或将大有市场潜力。与此同时，餐厅和饮料生产商可以运用天然成分调制吸引消费者眼球的饮料。”

— 陈杨之，研究分析师