

October 2015

Activity and Adventure Travel - UK

"Consumers are becoming more active on their holidays. Being outdoors in nature, getting fitter and de-stressing are the leading consumer motivations."

Anti-Ageing Beauty - UK

"The anti-ageing beauty markets benefit from a society which is perceived to prioritise youth; a pressure felt most strongly by women. The ageing population, coupled with men's changing attitudes towards beauty and grooming, is set to expand the user base, although traditional topical products may be threatened as treatments and ...

Attitudes Towards Lunchtime Foods - UK

"Wage increases have finally started to outpace inflation. This should translate to a greater willingness to buy lunch out of home more often, to trade up to premium options, and to buy extras such as snacks, drinks and desserts. However, the long slowdown means that frugal spending habits have become ...

Biscoitos Doces e Salgados - Brazil

"A categoria de biscoitos tem uma alta penetração entre os consumidores brasileiros. De acordo com a pesquisa Mintel, 96% dos entrevistados afirmam consumir algum tipo de biscoito, doce ou salgado.

Car Purchasing Process - China

"Even though the car market in China is experiencing a slowdown of market growth, there are still many reasons (eg government support, people's aspirations towards better lives and the purchasing power from low tier cities) for both manufacturers and consumers to believe that it will finally shrug off the difficulties ...

Aerospace Industry - UK

"The UK has invested in innovation and built on its established institutional knowledge to ensure a highly developed aerospace sector, enabling it to attract investment both domestically and internationally on high-value work packages. For the UK to continue to compete globally, continued investment in high-value design, skills, innovation and capacity ...

Attitudes to Advertising - Ireland

"With a high level of consumers taking steps to avoid promotional content, advertisers could look to strike a new deal with consumers. Offering incentives to view advertising could encourage them to re-engage with online advertising."

Babies' and Childrens' Personal Care - Brazil

"The majority of parents with children aged 8-12 at home report buying from one to three personal care products for their children, while a minority of them report buying from 7-12 products. Products that use licensed children's characters or that are endorsed by athletes and/or artists well known by ...

Bread and Baked Goods - UK

"Health-related concerns are amongst the key barriers to more frequent usage of packaged sliced bread among infrequent users. Among these concerns, carbohydrates and calorie content are on a par."

- Amy Price, Senior Food and Drink Analyst

Cereal - Ireland

"With sugar increasingly coming under scrutiny from health groups, government organisations and consumers themselves, we can expect to see cereal brands moving forward doing more to reduce their sugar usage – with a key challenge being to assure consumers that less sugar does not necessarily mean less taste."

— ...

Character Merchandising - US

"After some stagnant years, the character merchandising sector is coming back to life. That's due in part to 2013's Frozen heating up the sector. The LEGO Movie also helped spur results, causing LEGO's sales to jump in the first half of 2014 and allowing it to overtake Mattel as the ...

Children's Clothing - US

"Parents continue to struggle with issues related to sizing and would likely welcome solutions that address this. In-store shopping is preferred over online shopping given that parents often need their children to try on clothes, but online purchasing should become more prevalent in the future."

Clothing Retailing - France

The focus of this report is clothing specialists, because these are the dominant players in the sector. In this report we provide total consumer spending data for clothing, which includes expenditure through all channels. And we include Mintel's Channels of Distribution estimates for France, which indicate how this spending ...

Clothing Retailing - Ireland

"Despite the Irish economy witnessing high levels of consumer confidence in 2015, value-for-money retailers remain the most popular stores in Ireland. As the trend of fast fashion consumption continues to accelerate, we will likely see more Irish consumers opting for value retailers for their cheaper prices – enabling shoppers to ...

Clothing Retailing - Spain

The focus of this report is clothing specialists, because these are the dominant players in the sector. In this report we provide total consumer spending data for clothing, which includes expenditure through all channels. And we include Mintel's Channels of Distribution estimates for Spain, which indicate how this spending ...

Consumer Attitudes Towards Retail Credit - UK

Cheese - UK

"On the whole, the cheese category is expected to see only slight volume growth in 2015, largely due to the largest segment, cheddar's, lacklustre performance. In contrast, strong volume performance from recipe and territorial cheeses suggests consumers may be seeking greater variety in their cheese purchases."

Clothing Retailing - Europe

This report series covers the 19 leading economies of Western Europe. In total these countries account for around 95% of all European retail sales, excluding Russia.

Clothing Retailing - Germany

The focus of this report is clothing specialists, because these are the dominant players in the sector. In this report we provide total consumer spending data for clothing, which includes expenditure through all channels. And we include Mintel's Channels of Distribution estimates for Germany, which indicate how this spending ...

Clothing Retailing - Italy

The focus of this report is clothing specialists, because these are the dominant players in the sector. In this report we provide total consumer spending data for clothing, which includes expenditure through all channels. And we include Mintel's Channels of Distribution estimates for Italy, which indicate how this spending ...

Clothing Retailing - UK

"While clothing remains a highly resilient category, it is also a mature sector that is becoming increasingly overcrowded. As consumer expectations surrounding the shopping experience rise, retailers need to up their game and focus on the main issues that concern customers when buying clothes such as fit and availability of ...

Consumer Payment Preferences - UK

"Consumers may tell us that they are unenthusiastic about taking out credit to buy goods, but the evidence suggests that the demand for credit has risen steadily with the economic recovery. People may still be cautious, but they want to spend more. The only problem for retailers is that people ...

Cookies and Crackers - Brazil

"The cookies and crackers category has high penetration among Brazilian consumers, with 96% of Brazilians eating any type of cookie/cracker.

Cruises - US

"Recent growth in the North American cruise market has come primarily from increased frequency of cruising by core cruising consumers, who are largely affluent and 55+, rather than by growing the number of cruisers. The industry needs to attract the new and younger cruisers who could ensure future demand keeps ...

Diet Trends - US

"Consumers are somewhat skeptical about diet products, and instead of purchasing traditional diet-specific products they are turning to a well-balanced diet and products that support it."

Energy Industry - UK

"Widespread smart meter deployment should offer significant opportunities for energy suppliers - allowing them to offer more innovative and tailored tariffs and products. For example, the technology will make it possible for suppliers to offer "time of use tariffs" to customers, charging a lower price for power at off peak times ...

European Retail Briefing - Europe

This month ERB includes:

"The payments market defies all typical negative stereotypes of the financial services sector. It is dynamic, fast paced and innovative with multiple players competing to solve the payments challenges of both today and tomorrow. This is creating an environment that is both exciting and potentially hugely beneficial to both providers ...

Craft Beer - US

"As beer sales stagnate, craft is a small bright spot preventing a loss of share to wine and spirits. Mintel estimates craft growth in 2015, and continued growth through 2020, though at a slowing rate."

Cultural Heritage Tourism in the Middle East - Middle East

"The Middle East is struggling with modernism, much as Western civilisation did during the Age of Enlightenment. For tourists, there's always the allure of 'this could be dangerous'. A lot of travellers want to have a 'real' cultural experience and in the Middle East you get that still. It's not ...

Domestic Tourism - UK

"London continues to shine brightly as the primary UK tourist destination. However, there is still an opportunity for other major UK cities to highlight their holiday appeal to UK residents by putting far more emphasis on the unique cultural touchstones and experiences that each city offers".

– Rebecca McGrath, Leisure ...

Estilo de Vida Ocupado e Hábitos Convenientes - Brazil

"Os brasileiros buscam maneiras de economizar tempo, por meio de alimentação prática, serviços de beleza 24 horas, produtos de cuidados pessoais multifuncionais e de rápida aplicação, além de alternativas para evitar trânsito congestionado e filas longas. Neste contexto, a tecnologia é vista como uma aliada dos consumidores, ajudando-os a aumentar ...

Facilities Management - UK

Financial Services and Small Businesses - US

"The small business segment is changing rapidly, as an increasing percentage of small businesses are owned by women and minorities."

Health Supplements - China

"The health supplements market is forecast to grow at a steady pace thanks to the positive social economic environment. Further growth opportunity exists in answering the increasingly diverse consumer needs, ie health supplements are not just health-keeping measures, but also for living a better life."

– Karen Liu, Senior ...

Hispanic Cooking Enthusiasts - US

Food plays an important role in the life of Hispanics. It is around the table that Hispanics tend to have a good time with friends and family; it is through food that they express their love and keep their culture alive; it is through food that they explore and enjoy ...

Innovation on the Menu - US

"Consumers have unprecedented choice when dining out, and all restaurant segments are constantly vying for attention. Restaurant owners must keep in touch with what is currently happening in the foodservice industry and understand some of the emerging trends."

Leisure Review - UK

"Apps are continuing to be a major focus of innovation because they offer the dual benefit of improving the

"The facilities management industry has grown strongly both in times of recession and economic growth. The development of the market has continued in the public and private sectors, which are now demonstrating key differences in growth. However, the contracting out of non-core activities continues and generally realises greater benefits than ...

Gluten-free Foods - US

"While some consumers view the gluten-free diet as a fad, gluten-free food consumption continues to trend upward, fueled mostly by its general health halo, and also as a treatment for those with celiac disease or gluten sensitivity. Market competition continues to heat up as manufacturers both large and small enter ...

Healthy Lifestyles - US

"Though Americans are increasingly aware of health issues, many struggle to make significant changes. Consumers are constantly looking for new and better ways to live a healthy lifestyle without making significant sacrifices or interfering with other commitments and desires."

- Lauren Bonetto, Lifestyles & Leisure Analyst

Hotel Franchising in Europe - Europe

"More than 50% of new, four-star full-service hotel deals taking place over the next five years in Europe will be franchised deals and the use of lease/franchise structures is set to increase in Central Europe because it provides a way for hotel properties that require a lease to acquire ...

Inside-Out Beauty - UK

"There is a strong consumer perception of appearance through health; however usage of beauty supplements remains low which may be driven by low knowledge of beauty ingredients, as well as the high cost of products. Targeting the mass market could secure growth for the category, in addition to raising awareness ...

Lifestyles of Millennials - UK

"Because all the traditional markers of adulthood are less available to today's Millennials, they are redefining

customer's experience and also providing operators with rich data about their customers' behaviour and spending patterns"

Long-haul Holidays - UK

"With as many as four in ten long-haul holidaymakers booking more than five months in advance, this provides a great opportunity for holiday companies to make the most of the relationship with consumers, not just through the booking experience but also in the lead-up to the holiday itself, which allows ...

Marketing to People in their 20s - China

"The twentysomethings in China are an interesting group to study given the unique family structure they have been brought up in and China's fast economic development in the last two decades."

Menu Insights - China

"Standing out from the crowd is a phenomenon embraced especially by young consumers who are able to project their identity through avenues such as what they buy and eat."

— **Joshua Channon, China Analyst**

Mobile Apps - US

"Mobile applications are becoming an increasingly critical part of consumers' lives, but the market faces challenges in the form of consumer engagement and monetization. There is more pressure than ever to build intuitive apps that offer seamless experiences across devices and to become smarter about mobile targeting and promotions."

Mobile Phones - Canada

"The challenge for mobile phone brands in today's landscape is multi-faceted, with maintaining loyalty key among leading manufacturers in the marketplace, as well as offering entry-level smartphones to under-indexing demographics, such as those over 65."

what it means to be an adult for themselves. Marketing messages focused on traditional milestones of adulthood may no longer be as relevant; brands that acknowledge the shifting social norms will forge a much ...

Luxury Cars - US

"With an economy that is returning to stability and slowly growing again after a prolonged recession, the automotive market, from new cars to used cars to CPO (certified pre-owned) cars, is booming. That includes the luxury car market, as consumers are regaining the confidence to spend, and some of that ...

Men's Personal Care - US

The men's personal care market has remained relatively flat, with the biggest gains seen in the skincare segment, which is now beginning to stabilize. Looking forward, strong haircare sales will be the biggest driver in the market due to product launches among popular men's brands as well as men's increasing ...

Mobile and Tablet Apps - China

"China's mobile app market is fast growing and rapidly changing with fierce competition. Chinese consumers are actively downloading and using mobile apps, while relatively few of them have spent money on apps yet. Health and wellbeing apps have seen significant growth from last year, demonstrating opportunities for app developers as ...

Mobile Phone and Tablet Apps - UK

"The lion's share of app revenue in the UK market comes from free apps with either in-app purchases or in-app advertising. The abundance of free apps in these different forms means that paid apps account for a relatively small proportion of the market value-wise and many will look for ...

Pest Control and Repellents - US

"Warmer weather trends mean higher pest activity and incidence of pest-borne diseases. While consumer concern about pest-borne disease is relatively low, increased incidence of West Nile Virus, Lyme disease, and other diseases could mean greater concern if

– **Andrew Zmijak, Research Analyst, Consumer Behaviour and Social Media**

Pizza - US

"Retail pizza sales are consistent, if not spectacular, as consumers turn to the options most often out of the need for a convenient, value-conscious option for their families. Brands seeking to lure new or current consumers in the category should bear in mind the notable interest in customizable options and ...

Poultry and Game Meat - UK

"There is a need for tangible and easily comparable information on different welfare schemes in the poultry market. Helping shoppers to make an informed choice should help to unlock the added value of these initiatives in the eyes of the shoppers to drive demand."

Produtos de Higiene Pessoal para Bebês e Crianças - Brazil

"O mercado de fraldas descartáveis no Brasil é o exemplo de como inovação e comunicação dos reais benefícios de um produto podem dar certo. Com o aumento da renda familiar da nova classe média brasileira e a ascensão da mulher ao mercado de trabalho, os consumidores passaram a buscar a ...

Residential Care for the Elderly - UK

"There appears to be a three-tier system in residential care in the UK that looks set to become a two-tier system in the near future. The first tier 'luxury market' care homes are marketed like 'five-star' hotels and are targeting self-funding residents ahead of those funded by local authorities."

Seasonal Shopping (Spring/Summer) - UK

"The Spring and Summer months take a smaller percentage of retail sales than Autumn and Winter but include a number of important events for retailers. Easter is the most important of these, particularly for food retailers as much of the £530 million spent on products goes on food and drink ...

warmer weather patterns persist. Family households are most apt to use products and ...

Poultry - US

"Poultry has enjoyed steady sales increases since 2010 with continued growth through 2020, largely based on consumers' interest in eating better with leaner protein, and due to the increasing cost of beef. Other poultry – including turkey, duck, and other fowl – has had the strongest growth of all poultry ...

Private Medical Insurance - UK

"Subscription rates continue to fall, as many people are yet to see their disposable income increase enough to make paying for private medical insurance palatable. An increase in insurance premium tax set to take effect in November 2015 will lift prices further out of reach for potential new customers and ...

Red Meat - UK

"Inflation has been the primary driver of value growth in the red meat market in recent year. With wage growth outpacing inflation since late 2014, this should facilitate both volume growth and trading up in the red meat market"

Sandwiches, Subs and Wrap Concepts - US

"This report explores consumer dining, market and culinary trends in the fast food (QSR) and fast casual segments of sandwich, sub and wrap restaurants. The report covers consumer attitudes regarding the type of restaurant they visit and during which daypart, desired attributes of the foods they order, attitudes toward the ...

Serviced Offices - UK

"While London continues to generate the greatest demand for serviced offices, the Midlands and north are key growth areas to watch. Both these regions are benefiting from strong business start-up rates, increased investment, and government policy emphasis. Serviced office providers that are looking to expand will find positive development opportunities ...

Share Dealing - UK

"Share dealing appeals to a wider range of people than might be expected. This is the case both in the numbers of people who hold a share dealing account, as well as those who aspire to have an account in the future. At the same time, the execution-only channel is ...

Social Media and Financial Services - Canada

"Social media is a regularly used platform with 65% of the population visiting these pages daily. Despite active engagement across most categories via this medium, privacy concerns continue to hinder interactions with the financial industry."

Spectator Sports - UK

"Sport spectators are ready to share personal data as well as selfies from the stadium, but venues and brands need to catch up with fans' creative mindsets as much as with their technology requirements to take full advantage of the trend."

– David Walmsley, Senior Leisure Analyst

Streaming Media: Music - US

"Streaming music services have become a principle means of listening to music, now accounting for roughly one in three hours spent with music. The titans of tech, including Apple, Amazon, and Google compete in this space, yet pure-play services such as Pandora and Spotify continue to perform well, with Pandora ...

The Time-Pressed Consumer - Brazil

"Brazilians are searching for ways to save time, whether through convenient food options, 24-hour beauty services, multifunctional and quick-to-apply personal care products, or looking for alternatives to avoid traffic congestion and long queues. In this context, technology is emerging as an ally of consumers, helping them increase their productivity in ...

UK Retail Briefing - UK

Shaving and Hair Removal - US

"Current sales in the shaving and hair removal category remain sluggish, due to the competitive landscape and value-driven nature of the category. Sales are expected to level off with minimal gains through 2020."

Solar Panels - UK

"With opportunities for large-scale, ground-mounted solar deployment limited due to ROC cuts and proposed FIT subsidy cuts most severely affecting the residential sector, solar companies are expected to increasingly target the largely untapped commercial/industrial sector. Installers that successfully develop into 'smart contractors' are likely to be in the best ...

Still, Sparkling and Fortified Wine - UK

"With limited plantings and uncertain harvests, demand for Prosecco may outstrip supply in the near future, helping to push up prices but also creating opportunities for other sparkling wines such as Crémant and English Sparkling Wine to capitalise upon."

– Chris Wisson, Senior Drinks Analyst

The Customer Journey for the Home - UK

"For the future, internet content and dwell time on web pages will be vital metrics for retailers. By encouraging customers to browse for longer on their websites, retailers are more likely to convert browsers into purchasers, even if those customers go on to buy in stores. Developments of interesting and ...

TV Viewing Habits - UK

"Online video aggregators that collate a range of short-form videos to fit specific interests could re-invent the way that viewers discover new content, and create the ideal springboard for mobile viewing."

– Paul Davies, Senior Leisure and Technology Analyst

Vacuum Cleaners - US

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

Video Game Consoles (Hardware and Software) - UK

"After booming in 2014 as a result of sustained hardware sales, the video game and console market is expected to continue to experience strong growth in 2015 and beyond thanks to the recent and upcoming launch of leading AAA titles in the run-up to the holiday season, which is expected ...

Wine - Canada

Canada's wine industry has experienced growth in value and volume sales in recent years supported by an aging population and a general willingness to spend on quality wines. That said, consumer feedback suggests areas of prospective focus in order to build on the category's success such as the perception of ...

保健品 - China

"得益于乐观的社会经济环境，保健品市场预计将稳步增长。回应消费者日益多样化的需求（即保健品不仅为了预防疾病，也是美好生活的一部分）赋予品牌进一步增长的商机。"

— 刘超伦，高级研究分析师

汽车购买过程 - China

"尽管中国汽车市场正历经增速下滑，但仍有众多因素（如政府支持、人们追求更优质生活和低线城市消费者更强大的购买力）让制造商和消费者对最终走出困境信心十足。"

— 李宇静，高级研究分析师

葡萄酒 - China

"葡萄酒市场终于开始显示复苏迹象，进口活动回暖。但国产品牌在另一方面，却深受中端市场竞争加剧之苦，步履蹒跚。"

— 张一，高级饮料研究分析师

"There's an opportunity to make traditional vacuums even more versatile and maneuverable. While cleaning power is as important as ever, improving the vacuuming experience may have an even greater impact on the market."

White Spirits - US

"Growth has been small but consistent year-over-year from 2011 to estimated 2015, with low, single-digit growth. Overall sales are expected to continue upward at a similar pace, as dark spirits trend and vodka, the largest spirits segment, continues to post small but positive gains."

Wine - China

"The wine market is finally showing signs of recovery with importing activities thawing. Domestic brands, on the other hand, are suffering from intensified competition in the mid-range."

手机和平板电脑APPs - China

随着市场的迅猛发展，中国移动应用市场竞争加剧，变化日新月异。消费者热衷于使用各种类型的移动设备上网。智能手机和平板电脑在一到三线城市消费者中的渗透率分别达到99%和95%，而在这两种设备上，应用程序下载量相差不大。

菜单洞察 - China

"与众不同的价值观尤其受到年轻消费者的拥戴。该群体往往通过不同的方式（饮食或其他消费品）彰显个性。"

针对20多岁年轻消费者的营销 - China

"相比年长一代，20多岁的中国消费群体特征鲜明。然而，有些时候，辈分与年龄因素会被“放大”。英敏特发现20多岁群体本身体现极大的多样性，同时他们与年长的一代也有相似点（如求同心理）。"