

November 2016

Affluent/Mass Affluent Investing and Banking - Canada

“Financial advisors serving the affluent must not only develop a wider range of skills but also understand their attitudinal differences such as those related to risk perception and charitable giving.”

– **Sanjay Sharma, Senior Financial Services Analyst**

Attitudes towards Dermocosmetics - Brazil

“The dermocosmetics category is still a little underexplored in Brazil. Product launches with ‘anti-aging’ and ‘sun protection’ claims are still rare in the market, compared with other countries. Furthermore, 30% of Brazilians say they never used dermocosmetics, which shows that these consumers still know little about these products and their ...

Balas e Chicletes - Brazil

“Doces e chicletes são consumidos frequentemente no país, mas o consumo em volume está caindo. Um dos desafios para as empresas que operam na categoria é encontrar maneiras de reduzir o teor de açúcar e ingredientes artificiais utilizados em seus produtos, criando variedades mais saudáveis.

Os consumidores brasileiros cada vez ...

Beauty for Teens and Tweens - UK

“The popularity of beauty vloggers has proved hugely beneficial for piquing the interest of girls from a generation which is too old for toys and too young for boys in the beauty market. However, with the focus heavily on improving appearance with make-up, there exists an issue of low self-esteem ...

Childrenswear - UK

“The growing tween and teen population presents opportunities for the sector, particularly for retailers that offer the latest trends in age-appropriate styles because over half of children aged 10-14 want their

Atitudes em Relação aos Dermocosméticos - Brazil

“A categoria de dermocosméticos é ainda pouco explorada no Brasil. Lançamentos de produtos com benefícios como ‘anti-idade’ e ‘proteção solar’ ainda são insignificantes no mercado, comparado com outros países. Além disso, 30% dos brasileiros entrevistados afirmaram nunca ter usado dermocosméticos, o que revela que esses consumidores ainda conhecem pouco sobre ...

Automotive After Market - China

“The auto aftermarket in China is expected to exceed RMB one trillion in 2017. Chinese car owners spend RMB 5K-6K on maintenance annually on average. 4S store remains a key channel to visit with the leading satisfaction rate. Yet, Mintel’s study shows experienced maintainers have switched to franchise stores and ...

Beauty Devices and Appliances - UK

“The beauty devices and hair appliances sector is expected to rise in value in 2016 driven by NPD; however expense remains a barrier, particularly for beauty devices. Those interested in buying beauty devices also cited a lack of research as a reason for not buying, suggesting education opportunities. In the ...

Cheese - China

“The cheese market in China has been growing in a relatively flat pace compared to few years ago, due to the fall in global dairy prices. Low imported price has gained more room for brands to invest in awareness building and run promotions to push trials and consumption in order ...

Cinemas - UK

“The industry as a whole is looking in good stead to continue to grow as more and more innovation from technology and the independent sector keep movie goers keen to visit the cinema. Developments in 3D and 4D

clothes to be fashionable. Young fashion retailers are in a good position to target this demographic with specific teen ...

Cooking Enthusiasts - US

"In 2016, 45% of Americans aged 18+ are considered Cooking Enthusiasts – or adults who cook from scratch multiple times a week, enjoy the cooking process, have skills in the kitchen, and cook because they want to rather than because they have to. Due to factors such as the lower ...

Defence Industry - UK

"The risks and threats faced by the UK have increased in scale, diversity and complexity since the last SDSR in 2010. Russia's resurgence, the increasing cyber threat, instability in the Middle East and North Africa, and the growing threat of international terrorism illustrate how the challenge has evolved. The defence ...

Estilos de Vida Saudável - Brazil

"As atitudes dos brasileiros em relação à saúde são bem distintas. Enquanto que as mulheres priorizam alimentação e peso, os homens tendem a se concentrar mais no exercício físico. Hábitos saudáveis aumentam em relação direta a renda mensal e faixa etária. No entanto o crescente interesse em certas soluções de ...

Fabric Care and Other Washing Ancillaries - UK

"New product launches have created growth in value sales in fabric care, in contrast to many other household care categories including laundry detergents. While recent launches in the fabric conditioner space have focused on premium fragrances and longer-lasting freshness, there may be scope to add value through increased functionality. For ...

Fish and Shellfish - UK

"Despite positive attitudes towards fish and shellfish in terms of most people being confident preparing it, thinking it is a quick-to-cook meal option and seeing it as good for a healthy diet, the average consumer is failing to eat the recommended two portions of fish a week by some distance ...

technology are likely to draw in crowds of children and hard-core movie ...

Dark Spirits - US

"Distilled spirits (both white and dark) have enjoyed a significant (23.9%) growth since 2011, due in no small part to the rapid influx of flavors in the white spirit segment and a surge in interest in tequila. Similar flavor innovation is leading to growth in dark spirits, whiskey and ...

Electricity Industry - UK

"A key focus for DNOs is the development and roll-out of innovative smart grid technologies to support the growing clean energy capacity coming onto the grid. New challenges for operators of the UK's regional electricity networks have already started to arise from shifts in the way electricity is produced to ...

European Retail Briefing - Europe

This month ERB includes:

Financial Needs of Affluent and High Net Worth Consumers - US

"Most affluent and HNWI (high net worth individuals) have sophisticated financial needs and concerns, but only approximately half use a financial adviser and only one third have a written financial plan. Advisory services might make it easier for them to reach their goals, but trust in professionals is relatively low ...

Fish and Shellfish - US

"Driven by the perception of fish and shellfish as healthy alternatives to red meat and poultry, sales of fish and shellfish should grow slowly between 2016-21 to reach \$18.3 billion. Millennials, Hispanics, and households with children are most likely to buy, especially fresh. Wild-caught traits appear to be of ...

Fragrances - Brazil

"The fragrance market in Brazil is growing, especially men's fragrances, showing an opportunity for brands to explore other formats to appeal to male consumers. Considering consumers in general, some products help maintain frequency of use of the category, such as products that promise long-lasting fragrances, seen as better value for ...

Fruit Juice, Juice Drinks and Smoothies - UK

"Concerns around sugar continue to plague the category. While fruit juice is struggling under this pressure, the launch of no added or low sugar products and varieties claiming functional benefits appear to be helping fruit juice and smoothies. Unease around artificial sweeteners however, remains a concern."

Grocery Retailing - US

"The grocery industry is arguably the most dynamic and fragmented retail sector there is. Groceries are deemed necessities so this industry remains somewhat protected from outside influencers that could cause steep sales variances, but the largest factor right now impacting the category is declining foods costs. This benefits the shopper ...

Healthy Lifestyles - Brazil

"Brazilian attitudes toward health are polarized. While females focus on dieting and weight, males are more likely to exercise. Healthy habits increase with income and with age. However the growing interest in certain health solutions and tools indicates that this scenario could soon be changing."

– Renata Pompa de ...

Homeopathic and Herbal Remedies - US

The homeopathic and herbal remedies market continues to grow steadily. In 2016, total US retail sales are estimated at nearly \$5.4 billion, and Mintel forecasts a stable growth trajectory through 2021.

Household Surface Cleaners - US

Fragrâncias - Brazil

"O mercado de fragrâncias no Brasil vem crescendo principalmente no segmento masculino, indicando a oportunidade de se explorar outros tipos de formatos para este público. Considerando o consumidor em geral, vemos que alguns produtos ajudam a manter a frequência de uso, como formatos custo-benefício que garantem maior duração, e opções ...

Grocery Retailing - Canada

Canadian grocery shoppers are engaged with the centre of the grocery store, buying pantry staples as well as snacks and drinks. However, the area suffers from a bit of a bad reputation given the adage 'to stay at the perimeter in order to shop healthier'.

Health Cash Plans - UK

"There is a clear need to improve consumer awareness and understanding of health cash plans, as many people confuse them with PMI and few consider them good value for money. Only by overcoming these obstacles can providers significantly increase take-up."

– Sarah Hitchcock, Senior Finance Analyst

Hispanics' Attitudes toward Advertising - US

"Hispanics consume media content using a variety of devices. They expect advertising to be entertaining, as they prefer ads that are engaging and tell a story. This creates a challenge for advertisers, as they may have more success resonating with Hispanics if they can fit their narratives into that context ...

Hotels - UK

"The growing likelihood of rising inflation in the coming months could impact on how much UK consumers are willing to spend on their short break habit. There may well be an accelerated 'flight to value' which is likely to increase still further growing the market share of the rapidly expanding ...

ISAs - UK

"The market for household surface cleaners is mature, with a growth rate that is being outpaced by inflation. Convenience of multi-surface cleaning and antibacterial power are the leading attributes most consumers look for in surface cleaners, but secondary benefits such as scent, packaging, and natural ingredients are important among niche ...

Juice - Canada

"Canadians are drinking less juice than they used to. Different factors contribute to this challenging growth environment, such as an aging population in Canada and concerns around sugar. Based on predicted category trends juice companies will need to maintain or grow their share of a shrinking pie to achieve growth ...

Morocco Outbound - Morocco

"Morocco's outbound market was ranked 63rd in the world in 2014 by the World Bank, reaching 1.85 million departures. Outbound travel is undertaken by 5.5% of the Moroccan population, based on 2014 statistics and includes those in upper-income groups and the rising number of middle-class consumers living in ...

New Cars - Canada

"Automobile manufacturers and brands operating in Canada are facing a changing environment of evolving preferences and consumer demand. Generational considerations for type of vehicle and interest in vehicle features can be contrasting, as younger consumers prefer newer models and the latest technology innovations, while older drivers lean towards reliability and ...

Pharmacy Retail - China

"Pharmacy retailing is growing continuously and is expected to expand further, thanks to the solid consumer needs, pharmacies' business expansions as well as the medical reform. The government is still exploring the best medical system for the country, leaving opportunities and challenges for different players at the same time. Offline ...

Pizza Restaurants - US

"The ISA market is at a turning point. Overall contributions continue to grow driven by the stocks and shares sector of the market, but the number of accounts fell in the last tax year, as low interest rates undermine the incentive to save among many consumers. The introduction of the ...

Luxury Travel - UK

"While high-net-worth individuals should have the means to cope with any negative economic effects caused by Brexit, a sizeable proportion of luxury travellers are actually more concerned with Brexit than the average holidaymaker population. One way to encourage bookings in the next year could be a more flexible range of ...

Movie Theaters - US

"Both theater owners and studio executives continue to see moderate revenue growth. While consumers remain hesitant about the overall cost of going to the movies, they are willing to spend around \$20 per person for the entire experience. Millennials and Hispanic moviegoers are in favor of allowing social media use ...

Online Gaming and Betting - UK

"Smartphones and tablets are changing online gaming and betting habits within the home rather than expanding activity outside it as consumers embrace the 'anytime' nature of these technologies ahead of their 'anywhere' potential."

– David Walmsley, Senior Leisure Analyst

Pizza and Pasta Restaurants - UK

"Digital innovation and authentic dishes made from simple and fresh ingredients are transforming pizza and pasta into a destination business, helped by the expansive store presence of leading players. Independent players may be hit by competition from the swelling multitude of new entrants and deli-and-dining formats that are driving more ...

Poultry - US

"Pizza is a segment where innovation is consistently occurring from a menu and service perspective. While the segment is becoming more competitive and consumers value a premium pizza experience, there is an interest in menu items that go beyond the pizza, with a focus on healthier sides and appealing non-pizza ...

Premium Brands - UK

"There are different approaches to the perception of premium attributes among consumers. Brands that are considered exclusive by a higher proportion of consumers tend to conform to the traditional idea of luxury, however, brands that benefit from a high-quality image are often everyday brands that people use on a more ...

Ready Meals - Ireland

"Ready meals struggle to overcome the 'unhealthy' image they have received in recent years with consumer perception still tainted from the 2013 horse meat scandal. Highlighting the traceability and high-quality ingredients and techniques used in the preparation of ready meals can tap into the current high interest in scratch cooking ...

Small Kitchen Appliances - UK

"Creating healthier foods for wellbeing in a convenient way is the key theme driving demand for blenders, kitchen machines and soup makers. This segment of the market has been strong, taking over from juicers and food processors which had been on trend in the previous couple of years. Meanwhile demand ...

Sugar and Gum Confectionery - Brazil

"Candies and gums are frequently consumed in the country but volume consumptions are decreasing. One of the challenges is finding ways to reduce the sugar and artificial ingredients used, common to the products in the category, and create healthier varieties.

Supermarkets - UK

"Despite being a staple product for many consumers, the total sales of poultry are down due to decreases in both poultry prices and total volume sold due to the rapidly falling price of beef. Poultry manufacturers need to focus on the many benefits poultry has over other proteins and develop ...

Processed Poultry and Red Meat - UK

"The prospect of imminent cost rises heightens the need for companies to differentiate themselves by means other than price. That many buyers are willing to pay more for farmers' pay guarantees and for more specific animal welfare details underlines how placing their ethical policies front and centre can pay dividends ...

Sauces and Seasoning - China

"Chinese consumers' concern of their salt intake has increased significantly in the last three years: 22% of the surveyed consumers indicated eating less salt in 2014, and up to 48% have tried to limit their salt intake in 2016. However, according to Mintel GNPD, sauce and seasoning products with low ...

Soft Drinks - Ireland

"2016 was a good year for on-trade sales of soft drinks, particularly carbonates as improving consumer sentiment saw greater out-of-home spending on leisure activities. However, consumer concerns about sugar have continued to grow and with looming taxation of sugary carbonates this will make reformulating drinks to contain less sugar all ...

Sun Protection and Sunless Tanners - US

A hotter than average summer resulted in strong 2016 sun protection and sunless tanner sales. Brands are challenged by seasonal usage, with adults typically reserving sunscreen use for warmer summer months when sun exposure is more relevant and top-of-mind. However, interest in products with added skincare benefits, natural offerings, and ...

Supermarkets - Europe

“Supermarkets remain the dominant sector within the wider grocery market but continue to lose market share. This is as much to do with increased choice in the market and demographic shifts as it is the fault of supermarket operators. However, there is a need to redefine what a supermarket can ...

Supermarkets - France

“Hypermarkets and large supermarkets are a key feature in the French grocery retail sector, but they have seen competition increase from several other channels in recent years, namely from discounters, online and smaller more local stores and specialists.

Supermarkets - Italy

“The Italian economy has improved, but years of challenging market conditions have taken their toll. Fragmentation is growing as consumers spread their shopping around to get the best value for money. The discounters and conveniently located supermarkets are the strongest performers currently while the over-spaced hypermarkets are finding life increasingly ...

Supermarkets and Hypermarkets - China

“The disruptive growth of online grocery retailing is seriously challenging the supermarket and hypermarket sector. It can offer chain store retailers greater reach, and they have the advantage of logistics and existing customer bases of often loyal consumers. But, in order to face the online challenge, supermarket and hypermarket chains ...

The Affluent Consumer - UK

“The EU referendum in June 2016 has sparked a wave of economic uncertainty across the UK, with Britain’s most wealthy consumers a key consumer group for brands and businesses. Affluent consumers have the drive and financial ability to buy into Brand Britain, and so marketing and products that play on ...

The Black Premium Brand and Luxury Consumer - US

“Food retailing is going through particularly difficult times. There is deflation in most markets, which puts pressure on profitability unless there can be compensating cost savings. The hard discounters have revitalised their offer and are an increasingly powerful force in many countries. Their growing importance has led to increased emphasis ...

Supermarkets - Germany

“The supermarkets had a better year in 2015, helped by an improving economy and a transitioning Aldi. To maintain momentum the supermarkets need to continue investing in the things that consumers are willing to pay extra for, convenience and reliability.”

– Thomas Slide, Retail Analyst

Supermarkets - Spain

“The grocery sector in Spain continues to be dominated by a small number of leading retailers, with Mercadona the biggest player in the market. Mercadona not only attracts consumers with quality and clear pricing, but also has a strong own-brand proposition. However, the market is becoming increasingly competitive. To offset ...

Tablets and Hybrid Products - US

“The once high-flying tablet market has taken a tumble. Sales growth, which stood at 52% in 2012, fell to less than 10% in 2013 and 2014, and then the market contracted in 2015 and 2016. This Report provides guidance for marketers facing significant headwinds as consumers shift to larger and ...

The Asian Premium Brand and Luxury Consumer - US

The market for luxury goods in the US has been estimated at a value of about \$35.3 billion, accounting for about 22% of the luxury goods market in 2015. Japan is in the second position at an estimated \$30.5 billion and a 19% share, followed by Germany and ...

The Car Aftermarket - UK

Black consumers over index vs the general market on buying luxury brands, but it's not necessarily an exercise simply in conspicuous consumption. Several factors drive luxury brand purchase including the need to have agency of their identity, the desire for elevated status among their peers, and a connection to quality ...

The Food and Drink Shopper: Spotlight on Technology - US

"The competition for share of food/drink sales rages on. Consumer interest in low prices, convenience, and fresh options is fueling a shift in how they shop for food and drink, including a move away from traditional grocery retailers. Non-store retailers, including online merchants and subscription services, are expanding retailing ...

Tires - US

The replacement tire market is an extremely competitive market with a large number of brands competing for consumers in the US. Mintel forecasts a drop in sales, so brands will have to work to gain market share to continue growth. Marketers will need to find savvy ways to reach consumers ...

Travel and Tourism - Bolivia

"Bolivia's unspoiled, scenic beauty and rich culture has long attracted backpackers, but, with infrastructure improvements and a newly UNESCO-listed capital, it is poised to become a South American hotspot."

- Jessica Kelly, Senior Tourism Analyst

Travel and Tourism - Ecuador

"Ecuador is one of the world's greatest 'mega-diverse' countries, home to countless natural wonders and extraordinarily numerous wildlife that inhabit the unique regions of La Sierra in the high Andes, the coastal regions of La Costa in the west and the Amazon rainforest that is El Oriente in the east ...

Travel and Tourism - Puerto Rico

"Temperatures remain fairly constant year-round and for much of the year there is very little difference in monthly arrivals. Exceptions are the months of

"Replacement parts are an integral feature of the automotive market. Yet whereas recent years have seen relatively strong growth in the number of cars owned, and indeed new car sales, the value of the car aftermarket has expanded much more slowly. While this reflects a number of developments unique to ...

The Night Out: Entertaining Out-of-home - Ireland

"The majority of Irish consumers think that nights out of the home are getting too expensive. As such, operators within the night out economy will be increasingly challenged to demonstrate the value that they offer. Introducing unusual and surprising concepts that can showcase their wares in a new ...

Traditional Toys and Games - US

The toy market totals an estimated \$26.2 billion in 2016 and has experienced strong growth in the past two years. This trajectory is likely to continue into 2017 given the positive economic climate and the anticipated release of new installments in movie franchises popular with kids. Character merchandising is ...

Travel and Tourism - Cuba

"Cuba is experiencing unprecedented growth in international arrivals, fuelled by the restoration of diplomatic relations announced by Cuban and US presidents Raúl Castro and Barack Obama in 2014, which has led to an easing of travel restrictions for American citizens. The government's economic reforms are leading to increased opportunities for ...

Travel and Tourism - Haiti

"While the Haitian economy is still recovering from the 2010 earthquake, concentrated focus on tourism development is bringing the country back onto the international map."

- Jessica Kelly, Senior Tourism Analyst

Travel and Tourism - Venezuela

"Venezuela is entrenched in a deep political and economic crisis. Its economy has failed and confidence in its government is at an all-time low. Unemployment

September and October, which is the low season. During those autumn months, visitors can find some excellent deals on accommodation. Hotels cut their prices in order ...

Trends in Travel and Tourism Distribution - International

“Mobile is increasingly taking over as the channel of choice for searching and booking travel. Indeed, there is little doubt that searching and booking via mobile devices, which include smartphones and tablets, has become the fastest-growing travel-distribution channel in virtually every major market worldwide.”

Water Filtration - US

"Despite more than half of adults owning either a water filtration system or product, and nearly one third saying they avoid drinking tap water as much as possible, sales of the water filtration market are expected to decline by 1% in 2016."

Wine - US

"Dollar sales of wine are estimated to reach \$61 billion in 2016, an increase of 22% since 2011 (14% inflation-adjusted). Volume sales are growing at a slower rate (7% from 2011-16), pointing to the influence of higher price point products."

奶酪 - China

“消费者对生活越来越讲究，品牌要想跟上消费者的步伐，就需要提供更多的创新产品来吸引成年人。人们追求健康的饮食习惯，所以品牌更应把重点放在奶酪的营养价值上。对于品牌而言，付出更多努力、通过各种渠道向消费者普及奶酪的相关知识也很重要。”

葡萄酒 - China

“虽然本土葡萄酒企业仍然是市场领导者，但随着线上购物的流行以及国际产品更容易买到，中国消费者越来越了解外国品牌和进口葡萄酒。目前在中国，葡萄酒已成为全国上下各线城市不同消费群体的大众饮品，而不再像以前那样被认为是专属精英人士的尊享用品。特殊活动或休

and inflation are soaring, and shortages of essential commodities and services including food, power and medicine are commonplace. These problems have been compounded by the ...

UK Retail Briefing - UK

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

Wine - China

“Although domestic wine players are still the market leaders, along with easier access to online shopping and international products, consumers in China have become more aware of foreign brands and imported wines. Wine in China is no longer seen as an indulgence of the elite as it previously was, but ...

医药零售 - China

“得益于强劲的消费者需求、药店业务扩张以及医改药改政策，医药零售持续增长，并预计将进一步延续上行趋势。政府仍在探索最佳的全国性医疗系统，为不同竞争者同时带来机遇与挑战。实体药店如今通过并购寻求增长。而网上药店尽管积极创新，但由于新政推出，面临更多的不确定因素。”

汽车售后市场 - China

“中国汽车后市场预计将在2017年超过1万亿元人民币。中国车主在汽车维修保养上的花费平均为5,000-6,000元人民币。4S店仍然是消费者首选的渠道，具有最高的消费者满意度。然而，英敏特研究显示经验丰富的车主已经转向连锁店和线上平台，以期获得同样高品质，但成本更优的解决方案。”

超市和大卖场 - China

“线上日用品零售业的迅速崛起给超市和大卖场行业带来严峻挑战。连锁零售店可以借此覆盖更大范围，此外还具有物流优势和现有客户（大多为忠诚度较高的客户）基础。但是为了面对电商带来的挑战，连锁超市和大卖场必须通过提供质量更高的产品和服务来努力提升自己的市场表现。他们可以通过线上融合来接触到更多消费者，包括

闲聚会场合等消费场合是促使消费者购买葡萄酒的主要因素，因此葡萄酒公司和品牌应着重开发这些场合。”

农村地区的消费者。这要求零售商提高服务水平，根据不断变化的消费者需求改进店面模式，更积极主动地与日益多样化的线上消费者互动交流。”

酱料和调味品 - China

“过去三年中，中国消费者对食盐摄取量的关注明显提高：2014年，22%的被访消费者表示他们吃更少的盐，2016年有高达48%的消费者曾尝试减少盐摄取量。但根据英敏特全球新产品数据库，具有“低/无/减钠盐”宣称的酱料和调味品并不能反映出这些调查结果，这为酱料和调味品公司推出新产品和改进产品提供了机会。”