

## December 2016

### Alimentação Saudável - Tendências - Brazil

“Os brasileiros já perceberam que a alimentação saudável contribui não somente para a perda de peso, mas também para a manutenção da saúde em geral. Existe o interesse em produtos que contribuam para a saúde física (como os que ajudam no desenvolvimento muscular) e mental (como melhoria do estresse). Além ...

### Attitudes towards Weddings - UK

“Nearly half of all adults have attended at least one part of a wedding/civil partnership celebration in the last three years, presenting opportunities for retailers to tap into the need for gifts and new clothes amongst future guests. The charity sector could also look to benefit from stronger associations ...

### Beauty Tools and Accessories - UK

“The beauty vlogger phenomenon has boosted the popularity of make-up brushes and blenders, with innovation in the market now focusing on keeping these products clean and hygienic. This hygiene focus presents opportunities for other tools such as hairbrushes and nail files, to encourage more frequent replacement.”

### Beer - UK

“With the concept of pairing beer with food having gained traction among UK consumers, “dine in” meal deals look to be a huge missed opportunity for beer. These would provide an ideal platform to give world beers – which are already growing in popularity – even more visibility through partnering ...

### Bronzeador e Protetor Solar - Brazil

“Um terço dos brasileiros entrevistados (33%) disse usar produtos de cuidados com o sol todos os dias, inclusive durante o inverno. Porém, 35% deles afirmaram que geralmente esquecem de aplicar produtos de cuidados com o sol. Explicar aos brasileiros os riscos da exposição ao sol e educá-los a usar ...

### Apps and Applications - Ireland

“Browsing app stores is one of the main ways Irish consumers find apps, indicating that the app store environment is an important influencer on the decision to download an app. As such, optimising their apps to include keywords in the title and description of the app and regular updates will ...

### Auto Service, Maintenance and Repair - US

"Auto service, maintenance, and repair is a critical component of vehicle ownership. Vehicles require regular maintenance and upkeep to ensure their longevity and use, and neglecting such responsibilities can result in extremely costly repairs for consumers."

### Beer - China

“Chinese consumer spending has been hit by the economic slowdown; beer sales in China are also slowing, essentially caused by premiumisation (quality over quantity which has resulted in reduced volume sales) and unfavourable weather (eg a rainy summer and severe flooding influenced levels of beer production). In order to grow ...

### Brand Leaders - UK

“Perceptions of the biggest brands in FMCG sectors tend to be fairly secure and steady, suggesting that consumers have a mindset about familiar brands that rarely wavers. However, in other more dynamic markets there is less of a bias towards heritage brands, allowing new entrants to compete with established brands ...

### Changing Face of US Healthcare - US

"Most consumers, particularly seniors, have visited a healthcare provider in the past year with the largest share of visits going to general practitioners. While healthcare costs are concerning, consumers are not very likely to discuss these costs with their healthcare provider. Some healthcare providers have an opportunity to refocus on ...

## Cloud Computing - UK

“Cloud computing continues to make further inroads into the IT market. The combined prospects of lower and controllable costs and total scalability are seductive enticements to both enterprises and SMEs, with the latter firms also suffering from a lack of skills that is conveniently addressed by contracting out applications. The ...

## Coffee Houses - China

“The out-of-home coffee market is expected to continue robust growth although coffee houses may face increasing competition from non-specialist coffee places. As brands target more locations and go premium, they must bear in mind that experience is what matters the most.”

– **Summer Chen, Research Analyst**

## Commercial Borrowing - UK

“Post-credit crunch, the industry has faced a wave of new challenges, including unprecedented regulatory changes and, more recently, the uncertainty created following the Brexit vote. Each factor has impacted the sector in a number of ways, requiring lenders to review and develop their positions, while maintaining a more responsible lending ...

## Condiments and Dressings - UK

“Changing meal preferences have hit the demand for traditional condiments. Meanwhile, NPD focused around hot and spicy flavours and those inspired by world cuisines has so far failed to re-energise sales. Steps to re-engage users are much needed. With strong interest in versatility, suggestions for pairing condiments with different meals ...

## Consumers and General Insurance - UK

“Sales of general insurance are well set to grow by volume because of the captive customer bases in car and home insurance. However, intense price competition could hold back growth in premiums. Looking ahead to 2017, the pending rise in IPT will further squeeze the profitability of policies. Despite these ...

## Coffee and Tea on Premise - US

“The on premise coffee and tea market is characterized by the sustained growth of existing establishments and the influence of third wave coffee shops. While most consumers are satisfied with current coffee/tea options, a new generation of consumers is driving the trend to premium beverages. Restaurants face strong competition ...

## Coffee Shops - UK

“Coffee shops have countered brand fatigue by experimenting with quick-service formats and better food options. Price-led concepts rival non-specialists that are eating into the market share. Meanwhile, efforts in cutting down packaging waste and reducing added-sugar content give coffee shops an edge over competitors.”

## Condiments - US

“The large and mature condiments and dressing categories have generated little growth overall over the past five years, a trend that is not expected to change in the next five. Still, these diverse categories hold ample opportunity for brands and retailers that can activate consumer interest in exploring new tastes ...

## Consumers and Direct Investment - UK

“Direct-to-consumer investing has grown steadily in the last five years and this growth will continue in the coming years. As well as positive market conditions for growth, there is also consumer demand for direct services. People are keen to take control of their finances and will look for the tools ...

## Digital Trends Winter - UK

“The launch of Google’s premium Pixel and Pixel XL handsets in September will not have made things any easier for Apple and Samsung at the upper end of the smartphone market, while challenger brands like Huawei and OnePlus are releasing ever-more competitive handsets in terms of performance at more affordable ...

## Dining Out: A 2017 Look Ahead - US

"Restaurant sales are predicted to grow at a steady rate with yearly growth near 4% through 2021. Consumers are craving unique experiences, and legacy chains can no longer rely on what's worked in the past, especially as the environment becomes more competitive. Across demographics, consumers still find value in a ...

## European Retail Briefing - Europe

**This month ERB includes:**

## Factory Outlets - UK

"Despite a relatively saturated factory outlet market in the UK and a challenging retail environment, retail sales through factory outlet schemes continue to grow. The leading operators have tapped into an appetite for discounted clothing, offering value for money. However, beyond that, the best performers have continued to invest in ...

## Grocery Retailing: Brand vs Own-label - Ireland

"Volatility of the economy post Brexit coupled with a competitive grocery retailing market will see consumers become more cautious with their spending over 2017. As a result, Mintel expects many consumers to switch their allegiance from branded to own-label food and drink when carrying out their grocery shopping. In order ...

## Healthy Eating Trends - Brazil

"Brazilians already seem aware that healthy eating contributes not only to weight loss, but also to good general health. There is an interest in products that contribute to both physical health (such as those that help with muscle development) and mental wellbeing (such as stress relief). In addition, healthy eating ...

## Dollar Stores - US

"Dollar stores are sitting fairly pretty at the moment. They are housed within a broader subcategory of "other general merchandise" stores (according to the US Census Bureau's Annual Retail Trade Survey NAICS classification) which is the fastest growing sector within the total general merchandise category inclusive of discount department stores ...

## European Retail Rankings - Europe

This report provides a snapshot of the leading retailers in Europe, ranked by 2015 revenues translated into Euros at the average rate ruling through the year. We cover the Top 350 European retailers and include country and sector sections, which detail those of the top 350 companies that are present ...

## Free-from Foods - UK

"The free-from market continues to see impressive growth. NPD has been a key part of recent growth, enabling the market to gain share of users' spend through unlocking new occasions and encouraging trading up. High interest in products delivering on health, naturalness and portability highlight areas of innovation going forward ...

## Healthy Eating - Ireland

"In today's market, most consumers aim to achieve a balanced diet – a middle ground where some unhealthy foods have a place. However, this has led to a decline in light or diet foods with a harsh attack witnessed on sugar in recent years. Meanwhile there is strong demand for ...

## Hispanics and Alcoholic Beverages - US

"Hispanics' expenditures on alcoholic beverages have experienced significant growth over the past five years due to improving economic conditions that allow for increasing expenditures on discretionary items. Despite this, Hispanics' share of expenditures on alcoholic beverages under index relative to Hispanics' share of the US population, in part because Hispanics ...

## Home Insurance - UK

"New technology has the potential to substantially boost consumer engagement by providing policyholders with a means to take greater control of their home insurance policies, leaving behind the passive products of the past. With start-ups waiting in the wings, insurers must rise to the occasion and use the technology to ...

## House Building - UK

"The housebuilding industry is enjoying a period of strong growth and rising profitability, though output remains low compared with historic levels despite that growth. The real issue is that annual house completions are running at about half the 250,000 figure the government identifies as necessary to meet future housing ...

## Hybrid and Electric Cars - UK

"From what can be considered as comprising a niche market, hybrid and electric cars are quickly establishing themselves as a fast-developing market. Stimulated by support from government and manufacturers, demand for these vehicles has led to them becoming the most dynamic segment within the UK car market. With support and ...

## Life Insurance - US

"The majority of American consumers currently have life insurance, but are still looking for ways to customize their current plans. Those who do not have life insurance would be hard-pressed to find a reason to apply for and purchase a policy. Marketers who can inspire consumers to focus more on ...

## Live Entertainment Venues - US

"As streaming music subscriptions replace album sales, recording artists hit the road to generate income from touring. This has led to an abundance of exciting live shows to choose from in the past few years, including record-breaking concert tours. Fans continue to show their enthusiasm for the live entertainment experience ...

## Home Storage Solutions - UK

"The UK's homes are getting smaller, but people have more and more possessions. Home storage has become an integral part of every home, serving to help households run smoothly, take control of their surroundings and keep on top of clutter. By storing things better, tasks around the home, including cooking ...

## Household Cleaning Equipment - US

"Sales of household cleaning equipment have experienced marginal growth due to inflation and price competition. Cleaning equipment used in lighter cleaning continues to be more frequently used, as spot cleaning gains wider acceptance as the norm in housecleaning. This shift coincides with a respective drop in cleaning equipment used in ...

## Leisure Review - UK

"Social media has become increasingly image-based, which leisure venues need to take into account as they look to utilise social media for promotion and engagement. Leisure venues should be looking to offer creative, visually rich experiences that people will want to post pictures and videos of online."

– Rebecca ...

## Lifestyles of Affluent and High Net Worth Consumers - US

US Affluent and HNWIs, with their large amount of income-producing assets, are important to lifestyle brands, particularly those offering value-added products and services. With higher-than-average household incomes, they command a significant amount of purchasing power across a variety of areas, from in-home food to household care to leisure and travel ...

## Luxury Cars - Canada

Luxury automobile manufacturers and brands operating in Canada face a very competitive market with a plethora of models and options for consumers to choose from. A strong interest among consumers in considering a luxury vehicle for their next purchase displays positive signs for the segment.

## Magazines - UK

“Consumers are more likely than ever to be accessing content one article at a time via social media or search, weakening the appeal of printed collections of content. The popularity of digital channels is pushing publishers towards multimedia content as users of digital channels expect video, interactive polls and other ...

## Marketing to Mums - China

“Modern Chinese women are more confident than ever. But when they become mums, their life is no longer the same and they feel somewhat disoriented and helpless. New mums will see the world from a new perspective and learn how to walk the crooked path of motherhood independently. They are ...

## Natural and Organic Personal Care Consumer - US

“The natural and organic personal care market has grown within natural supermarket channels with many users saying they buy more of these products now than they did one year ago. To increase sales and household penetration, players should work to reduce skepticism evoked by fragmented and confusing claims, and emphasize ...

## Outbound Travel - China

“Chinese outbound travellers are becoming more demanding than ever before. The most popular outbound travel themes are romantic getaways and family trips. Consumers take their travel inspiration from a variety of sources including films and books, meaning marketers can also leverage various information channels to market travel destinations.”

— ...

## Prestige Beauty - UK

“The prestige beauty market fared well in 2015, driven by a positive financial sentiment driving high purchasing levels among affluent, young consumers. As prestige BPC products are purchased by both men and women because they want to treat themselves, encouraging self-indulgence will be key to driving growth going forward, with ...

## Manned Security - UK

“The value of the manned security industry has fluctuated significantly over the past five years, punctuated by a number of demand spikes following major national events. The manned guarding sector continues to be dominated by small-to-medium sized enterprises, which have enjoyed ongoing prosperity despite the presence of some large-scale international ...

## Medical Equipment - UK

“Driven by the ageing population, there remains a significant drive to develop equipment and devices that can both help treat age-related conditions and attack chronic diseases. However, manufacturers must also contain costs as the healthcare industry remains in a period of restrictive budgets.”

— Lewis Cone, B2B Analyst

## Oral Hygiene - China

“The increase in electric toothbrush adoption and the success of local brands selling premium pharmaceutical toothpaste products clearly shows the trend that Chinese consumers are not only just paying more attention on oral care, but are also spending to upgrade. This underlines the importance of product efficacy. The competition is ...

## Plumbing - UK

“The plumbing products sector has been recovering strongly from the recession, aided by the en-suite trend, high house price inflation encouraging home improvements, and comparatively buoyant new construction activity. Even so, there have been areas of disappointment, such as the government’s intervention on boiler replacements. Prospects have now been thrown ...

## RTD Alcoholic Beverages - US

“RTD (ready-to-drink) alcoholic beverages make up a small share of alcohol sales. Fortunately, declines among prepared spirits-based cocktails and wine coolers may be slowing. The category delivers on convenience, with the highest percentage of participants turning to RTDs over other alcohol types because they don’t require preparation. Addressing consumption barriers ...

## Secondary Residences and Holiday Rentals - International

"The wind is shifting as increasingly the luxury segments of resort and other exclusive property markets are encountering weakness while the lower and medium tiers of the market remain resilient. So far Airbnb has enjoyed phenomenal success by trying to be 'all things to all people'. However, the accommodation-rental market ...

## SIPPs - UK

"The SIPP market is increasingly diverging into two separate areas: lower-cost and lower-value platform SIPPs and full-range bespoke SIPPs. Despite the many challenges ahead, there is a place for both plan types. Bespoke providers will have to hold greater levels of capital, and yet more of them may be forced ...

## Small Kitchen Appliances - US

"After years of stable gains, small kitchen appliance sales remained relatively flat due in part to the struggling beverage making appliance segment. Going forward, product innovations that focus on design and function, as well as a stabilizing beverage maker segment, may help restore category growth."

## Sports Participation - UK

"Participation sport is turning to technology to help it kick on from the plateau it has inhabited since the London 2012 Olympics, with its first target being to move beyond the individual focus of performance tracking and develop new products and services that promote the fun and social sides of ...

## Sugar and Sweeteners - US

Dollar sales of sugar and sweeteners fell from 2011-16. Three category segments (sugar, sugar substitutes, and syrup) experienced overall declines, due to the stigmatization of sugar, and concerns about artificial sweeteners. Improving the perception of the category is in order. The honey segment has flourished during the period, garnering the ...

## Suncare - Brazil

## Sexual Health - UK

"Durex is by far the dominant player in the market. Far from resting on its laurels, however, the brand consistently aims to instil in young adults the importance of safe sex, with initiatives that leverage the cultural themes and media most resonant with this group. To an extent, this is ...

## Skincare Ingredient and Format Trends - US

"The skincare market is highly saturated, and brands are challenged by consumer preferences for simplicity as well as a tendency to stick with the same products each time they make a purchase, limiting product trial. Brands will focus on unique offerings to capture the attention of consumers, with Korean skincare ...

## Spirits/Mixed Drink - Canada

"Mintel forecasts spirits sales to grow over the next five years with whisky and gin having led the charge in recent years. This growth has occurred as consumers look forward to innovation while also harkening to past eras for inspiration, such as the early 1960s serving as the milieu for ...

## Sugar and Gum Confectionery - UK

"While the market has remained resilient amidst the sugar debate, it is facing pressure to contribute to reducing sugar consumption. Portion control will be an important tool for operators to reach the reduction goal. Meanwhile, that many parents are open to artificial sweeteners in kids' sweets highlights this as an ...

## Sugar Confectionery - China

"To win over the more health-conscious consumers, brands need to invest more efforts in communicating ingredients, sweeteners and nutrition, and make gum products more relevant for urbanites that concern about dental health. Besides, targeting females by strengthening credible benefit and the rookie young parents (who are chasing novelty themselves) by ...

## Suncare - UK



“33% of the Brazilians interviewed said they use suncare products every day, including during the winter. However, 35% of them said they often forget to apply them. Explaining the risks of sun exposure and educating them to use sunscreens daily, and not just during the summer, are still big challenges ...

## **Supermarkets and Hypermarkets - Brazil**

“The grocery retail world is quite competitive and operators that can offer new products and services will certainly stand out and get ahead of the competition.

## **Sweeteners and Attitudes toward Sugar - Canada**

"Sugar remains a staple product for Canadians as 87% use any kind of sugar or alternative sweetener. That said, the category faces challenges as seven out of 10 (69%) Canadians are concerned about the impact sugar has on their overall health. Notably, concerns extend beyond mere usage for cooking but ...

## **Travel Agents - UK**

“The main selling point in a world of increasing automation will become human expertise (or innovative combinations of the technological and the human). For travel shops this is likely to mean increasing specialisation of knowledge and personalisation of product in order to offer customers something not easily replicated online in ...

## **Utility Capital Expenditure - UK**

“The approach to infrastructure investment is in transition across the utility industry. Whereas spending was previously mainly output-driven, future investment decisions will be increasingly centred on innovation, asset optimisation and long-term outcomes. Operators will also be challenged by rising pressure from industry regulators to reduce costs for consumers, which highlights ...

“The suncare sector is estimated to show little change in value in 2016, despite a rise in usage of sun protection and self-tanning products. This is likely due to savvy shopping behaviours which have seen discounters rise in popularity. NPD in usage occasions has boosted usage in the self-tanning sector ...

## **Supermercados e Hipermercados - Brazil**

"O mercado varejista de alimentos e bebidas no Brasil é muito competitivo, e os varejistas que irão se destacar entre os consumidores, e ultrapassar a concorrência, serão aqueles que oferecerem novos produtos e serviços.

Devido à situação econômica, varejistas de alimentos e bebidas precisam aprender a lidar com consumidores que ...

## **The Affluent and High Net Worth Premium Brand and Luxury Consumer - US**

"Affluent and High Net Worth Individuals (HNWIs) are key consumers of luxury brands. However, these wealthy individuals are less likely to be swayed by luxury brands' marketing strategies, as they skew older, male, and retired – demographics that tend to be less engaged with consumption and fashion trends. Younger Affluent ...

## **UK Retail Briefing - UK**

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

## **Visitor Attractions - UK**

“Visitor attraction numbers should continue on their growth path towards 2021. People are looking to escape the political and economic uncertainty that dominates the news at the moment. This means that they will be looking for forms of escapism close to home. The fall in value of the pound makes ...

## Wearable Technology - China

“Health monitoring is the major appeal of smart wristbands and smartwatches, and family-related features show potential to attract purchase. Brands should offer unique functions and entry-level products to motivate purchase. VR/AR technology can be an effective marketing communication channel to draw consumers’ attention.”

## Wearable Technology - US

"Sales continue to grow for wearable tech. However, sales for specific brands have already seen some reversals of fortune, including wearable cameras from GoPro and Apple smartwatches. Against this backdrop, Mintel explores the market for fitness-related tech using qualitative and quantitative surveys. Subjects include intent to purchase, gifting, participation in ...

## Youth Fashion - UK

“Growth in the market is slowing as young women spend less on clothes. Outperforming the market have been the fashion pureplays. Social media plays an important role in fashion purchasing, and without a physical store presence, the pureplays have been highly innovative in building up a social dialogue with young ...

## 口腔清洁 - China

“电动牙刷普及率增长和本土品牌销售高端药物牙膏的成功清晰揭示出中国消费者不仅更关注口腔护理，而且也开始趋优升级消费的趋势。这突显出产品效果的重要性。竞争因而更集中在产品创新，而不是价格激战上。”

— 金乔颖，研究副总监

## 啤酒 - China

“中国经济放缓抑制了消费支出；中国啤酒销售日趋放缓，主要由高端化（增量转为增质导致销量下滑）和恶劣天气（如冷夏和水灾影响啤酒产量）所致。若要实现增长，中国啤酒市场需实现多元化，这要求啤酒厂商开发多种产品，以迎合不同的细分市场 and 消费者需求。”

## 糖果 - China

“为了吸引健康意识较强的消费者，品牌需要付出更大努力介绍糖果类产品的原料、甜味剂和营养成分，并使口香糖成为都市消费者保健牙齿的相关产品。此外，通过令人

## Wearable Technology - UK

“Wearables’ expensive price tags can clash with their nature as ‘nice-to-have’ devices, leading consumers to worry they will stop using the device not long after purchase. Adoption could thus benefit from initiatives that empower current owners to act as advocates for the technology, as well as from longer trial periods ...

## White Spirits and RTDs - UK

“That an interesting flavour profile stands out as the top way to add value stands in contrast to white spirits’ traditional proposition of providing a subtle flavour, with vodka in a more challenging position in this respect. Gin has an edge in this context, being by its nature a flavoured ...

## 出境旅游 - China

“中国消费者对出境游的需求空前高涨。最热门的境外游主题是浪漫蜜月/纪念日度假和亲子活动。消费者从各种来源（包括电影和书籍）获取旅游灵感，这意味着营销商也可以通过多种信息渠道进行旅游目的地营销。”

— 李宇静，高级研究分析师

## 咖啡店 - China

“尽管来自非专营咖啡场所的竞争日趋激烈，咖啡店市场预计将保持稳健增长。品牌开始放眼更多场合并且走向高端化，这一过程中必须要认识到体验是至关重要的努力方向。”

— 陈杨之，研究分析师

## 穿戴式科技产品 - China

“健康监测是智能手环和智能手表的一大卖点，而家庭相关的产品特性有潜力鼓励购买。品牌应该提供独一无二的功能和入门级产品激发购买。VR/AR技术可以成为抓住消费者眼球的一个有效营销渠道。”

## 针对妈妈的营销 - China

“如今的中国女性比以往更自信。但成为妈妈后，生活发生变化，她们在某种程度上感到困惑和无助。新手妈妈将从一个崭新的视角审视世界，并学会如何在“母亲”这条崎





信服的健康功效来定位女性消费群体，通过富有趣味性的产品吸引新手父母（这些年轻父母自己就追求新鲜事物），将帮助品牌脱颖而出。”

岖之路上独立行走。没有一个母亲是完美无缺的，她们需要更多的理解和宽容。”

— 马子淳，高级研究分析师