

July 2017

Air Care - UK

"Although scent is a vital part of the air care category, many people still look towards the category for pure function: removing odours. As a result, fragrance-free products may provide a future area of growth as brands try to allay concerns over ingredients, and reduce discouraging factors such as scents ...

Bakery Products: Bread - Canada

"Canadians are eating less bread according to market estimates from Mintel Market Sizes with just over a third of bread consumers agreeing they "try to limit the amount of bread they eat". With this market softness bread manufacturers have innovated to address consumers' concerns from a nutritional perspective and have ...

Black Consumers and Personal Care - US

"Black consumers spend slightly less money per household, but a higher percentage of their disposable budget, within the personal care category. Most buy mass produced brands for basic maintenance, but will use prestige an Black consumer targeted brands that have products specially formulated to treat their skin care issues."

- Toya ...

Bridging Loans - UK

"Despite increased regulation, the industry has had many new entrants over the last two years. However, bridgers must be wary of there being a greater amount of funds available to borrowers than the number who actually need them."

- Lewis Cone, B2B Analyst

Business Traveller - UK

"The business travel market is facing uncertain times. The Pound is weak and inflation has risen since the UK voted to leave the EU. Companies will be looking to cut back on unnecessary spending, which opens the door for

America's Pet Owners - US

"Pet ownership continues on an upward trajectory with growth experienced among all segments (pet food, pet supplies, veterinary services, pet services). An interest in keeping pets healthy, coupled with the rising cost of veterinary care, is propelling the market forward as veterinarian services overtake pet food as the largest segment ...

Beer & Cider - Ireland

"Despite the increase in consumer beer prices and uncertainty around the Brexit – Irish beer and cider sales have performed well, with consumers being driven to spend more on value-added drinks such as oak-aged beers and ciders, or flavoured craft brews."

Body Care and Deodorant - US

"Total sales of body care and deodorant continue on their slow and steady upward trajectory, with sales projected to increase slightly more than 2% for 2017. The tepid sales performance of this industry is a function of continued consumption of deodorant as a hygiene staple, and high existing penetration in ...

Britain's Pet Owners - UK

"The undeniable feel-good factor linked to pet ownership can be harnessed in very compelling marketing messages. Advertising themes that centre on pets deserving the very best to thank them for the emotional benefits they bestow on their owners are likely to chime. There are also growing opportunities for products and ...

Cars and Commercial Vehicles - UK

"The primary narrative in the automotive industry over the past year has been the UK's prospective exit from the European; while still speculative, the industry's position

premium economy options in accommodation and travel. It also opens the ...

Ceramic Tiles - UK

"Use of ceramic tiles in the UK remains atypical to the rest of Europe, and is largely restricted to kitchens and bathrooms. Demand has been boosted by the en-suite trend, which originated from the new build market but has extended to the refurbishment market, but there has also been competition ...

Cleaning the House - US

"Housecleaning is a weekly routine with adults spending an average of nearly four hours a week cleaning. Demand for time-saving solutions makes convenient and robust cleaning products crucial. However, young adults also prioritize sensory attributes, such as scent and visual cues while cleaning. Future housecleaners are likely to pay more ...

Color Cosmetics - US

"The color cosmetics market experienced moderate growth in 2017, which represents slower gains than those seen in 2015 and 2016. While the market is saturated and some women are turning to value brands to cut costs, opportunities to reinvigorate sales include facial make-up products that offer relevant skincare benefits. Athletic ...

Comércio Eletrônico - Brazil

"Os canais de venda online estão se transformando no Brasil. Apesar de ainda não serem tão representativas quanto em países como Estados Unidos, as vendas do comércio eletrônico estão evoluindo e os consumidores têm à disposição diversos dispositivos – como laptops, smartphones e tablets – para realizarem suas compras. É ...

Consulting Engineers - UK

"Despite ongoing economic and political uncertainty, consulting engineers' fees income is expected to demonstrate continued growth over the next five years. Global challenges, such as population growth, climate change and urbanisation, together with the potential

at the forefront of international trade makes it particularly sensitive to negotiations."

– **Marco Amasanti, B2B Analyst**

Certified Pre-Owned Cars - US

"CPO (certified pre-owned) vehicles are used vehicles that have been certified by an auto manufacturer or dealership to meet specific quality criteria. Certification gives car shoppers assurances as to the quality of the used vehicle that was purchased and the vehicles typically come at a higher price point than a ...

Coffee - US

"After experiencing strong gains from 2012-15, the coffee market slowed from 2016-17 (est) as market penetration of single-cup coffee makers is saturated and fewer new owners has resulted in slower single-cup coffee gains. Still, cold brew sales are thriving and new cold brew innovations such as nitro cold brew and ...

Colour Cosmetics - China

"There is strong consensus that using make-up is a useful technique to boost confidence and at the same time to show respect for others. Particularly for middle-age women in their 30s and mums, being a charming individual with independence and maturity drives them to wear make-up every day. This is ...

Commercial Property - UK

"The overall outlook for the commercial property market is cautiously optimistic considering current economic and political uncertainties. In the short term, the market is set to be supported by continued occupier demand in key sectors, especially the industrial sector, and a relatively robust economic performance despite Brexit concerns. The investment ...

Consumer Attitudes towards Debt - UK

"Cheap loans and attractive credit card deals have fuelled a boom in unsecured lending since the recession. However, the economic fallout from Brexit means consumers are already feeling the squeeze of a

offered by rapidly evolving technology, will offer growth opportunities. In the UK, transport and energy ...

Consumers and Data Sharing in Insurance - UK

"The Internet of Things offers insurers a huge opportunity to develop much needed regular touchpoints with their policyholders. This could in turn help to improve customer retention by moving the focus of communication away from the annual policy renewal.

The majority of existing/potential owners of emerging smart devices say ...

Consumers and the Economic Outlook: Quarterly Update - US

"As of June 2017, the economy is still improving, wages are slowly rising, and unemployment numbers continue to fall. Consumer sentiment about their financial situation remains healthy, and most consumers don't think their finances will change (or increase) that significantly. Parents overall are somewhat more optimistic about the financial future ...

Department Stores - UK

"Department stores are having to justify their raison d'être and are seeking to adapt to the changing dynamics of the marketplace. The main players in the market have recognised a need to focus on experiential retail in response to growing demand for leisure and experiences over purchasing of products. They ...

Digestive Health - US

"The majority of adults experienced some kind of gastrointestinal problem in the last year, and just over half treated their ailment with an OTC (over-the-counter) medication. This denotes a strong base of digestive health consumers for category players. Still, category sales went relatively unchanged from 2016-17 as sales softened in ...

Drug Store Shopper - Canada

"Canadians remain faithful to traditional drug stores for their drug store needs. However, the convenience of

combination of rising prices and slow wage growth. As a result, more consumers are likely to turn to ...

Consumers and the Economic Outlook: Quarterly Update - UK

"The snap election clearly unsettled consumers. All three of our measures of sentiment fell between April and May. And the inconclusive result means that there was no immediate bounce in confidence post-election. Instead, our data shows that people were even more concerned after the results were announced than they were ...

Current Accounts - UK

"Regulatory measures aim to increase competition in the market, ensuring established providers will have to work harder to attract and retain customers. Open Banking should make it easier for people to compare and identify products that are better suited to their needs. However, the biggest challenge will be encouraging people ...

Desktop, Laptop and Tablet Computers - UK

"The UK computer market is set to continue its decline, but hybrid devices represent a key area of growth in the near future. Windows tablets appear to be benefiting from a turn towards hybrid devices the most, as Windows tablets can run the same software as laptops as well as ...

Digital Trends Summer - UK

"The majority of voice command use so far is likely to be through smartphones, given the infancy of the connected speaker market, but home-based devices like Amazon Echo and Google Home will become much more central to the voice control market as it evolves. As these devices become more widely ...

E-commerce - Brazil

"The online sales channels have been evolving in Brazil. Although it's not so big compared to countries like the

one-stop-shopping at other retailers poses a threat to patronage. Positively, Canadians still see drug stores as differentiated in their expertise. Having said this, diversification of products and services has worked to draw in a ...

Eating Out: The Decision Making Process - UK

“Special-occasion diners value quality of food more than offers while older diners expect low-priced items. Restaurants are moving away from formal and into homely interior designs to create third spaces for diners to feel at home. Fast food outlets may be attracting diners to visit with free Wi-Fi, but it ...

Food Tourism Worldwide - International

“The booming food-tourism sector has become one of the tourism industry’s major sectors and provides numerous opportunities to engage with a vast consumer base of visitors who are increasingly keen to engage with an astonishing diversity of global cuisines as a means of enjoying truly authentic, cultural experiences. Sustainability is ...

Furniture Retailing - UK

“The furniture sector has enjoyed a number of good years, but the market looks set to become much more challenging. It is therefore more important than ever for furniture retailers to ensure they have a clear position in the market, highlighting how they are delivering value for money while ensuring ...

Greetings Cards & Personal Stationery Retailing - UK

“Resistant to the growing threat of digital alternatives, the UK greetings card and personal stationery market has continued to grow. Growth in consumer spending on greetings cards has outpaced stationery. However, a number of trend-driven retailers have proven that demand for both well-made and well-designed stationery remains robust. Looking forward ...

Health and Fitness Clubs - UK

United States, the Brazilian e-commerce market is being transformed and consumers have access to all the devices needed to do their online shopping (laptops, smartphones, and tablets). It is important, however ...

European Retail Briefing - Europe

Analyst comment on Amazon and its recent developments within the grocery retail sector.

Frozen Ready Meals - China

“With needs for convenience and variety well catered for by food delivery services, and Chinese consumers becoming more nutritionally savvy and open to exploring product varieties, frozen ready meals are being consumed for different reasons and on new occasions.”

Gifts - US

“Most consumers give gifts for birthdays and holidays, even those who are less likely to gift for other occasions, but aside from that, gifting is a varied process for most. Some consumers give gifts for life milestones, while others rarely do. Preferences in the types of gifts given and desired ...

Grilling and Barbecuing - US

“The grilling and barbecuing market continues to perform well, parallel to the improving economy as well as adults’ growing enthusiasm for grilling. High household penetration challenges the market, yet the category is poised for moderate growth as younger adults embrace grilling as a regular cooking practice that offers social, emotional ...

Hispanics and Personal Care - US

“The health and fitness market is in a strong position to continue growing. With an increased focus on active lives, healthy eating, and exercise from both consumers and other industries this should feed into the health club sector. Operators need to keep up with market trends, especially technology.”

– ...

Hotels in Scandinavia - Scandinavia

“The lease structure – especially revenue-based contracts, which share the risk between hotel operator and owner – is firmly entrenched in the Scandinavian hotel industry and does not seem likely to recede any time soon – particularly given the ongoing expansion of Scandic’s leased estate. Indeed, Scandic’s extensive leased portfolio ...

Juice - Brazil

“The preference for freshly squeezed juice in Brazil makes it necessary for packaged juice to offer a strong differential to appeal to consumers. Innovations such as usage of organic and natural ingredients can help boost the category, especially among older people, who have a high interest in these attributes and ...

Life Insurance - Canada

“The life insurance industry is embracing FinTech at a slower pace relative to banking but the shift towards increasing digitisation is spawning innovation and changing business processes.”

Managing Skin Conditions - UK

“A poorly-funded health service means those with skin conditions are becoming more self-sufficient; diagnosing their own ailments and looking for organic solutions to fit their lifestyle. This could create opportunities for the non-prescription market to develop more natural products, or extend into segments previously off-limits due to skin sensitivity. Retailers ...

“Hispanics’ expenditures on personal care products remained practically flat between 2012 and 2017. While brand loyalty seems difficult to achieve, there are opportunities for brands that make an effort to consistently connect with Hispanics, going beyond trial. Personal care is a category in which brand is only important when it ...

Insurance - China

“China contributes over half of the world’s insurance market growth, which is mainly driven by the strong wealth management demand of domestic investors. But that’s just part of the story. Insurance buyers, especially young people, have started to recognise insurance’s true value of risk management, reflecting the growing acceptance of ...

Laundry and Fabric Care - China

“Even though the laundry and fabric care market in China has been saturated with steady demand, brands are investing in new product development to keep consumers engaged and trading up to products with additional functions and concentrated liquid detergents. However, fabric conditioners and softeners are still struggling to thrive in ...

Lifestyles of Children and Teens - UK

“Gender stereotypes remain apparent among today’s children and teens, underlined by the types of subjects they prefer at school, as well as their perception that certain career paths are more suited to a specific gender. As gender equality becomes an increasingly pressing issue for businesses, there is scope for brands ...

Mobile Phone and Tablet Accessories - Canada

“As mobile hardware and connectivity increasingly become central to consumers’ lives, a wide variety of accessories are being purchased to facilitate usage. Looking forward, sales will be driven not only by a desire for necessities such as cases and chargers, but also by products that increase functionality, such as portable ...

Mobile Phone and Tablet Accessories - US

"For many, and especially younger adults, mobile hardware is the center of digital lives. Accessories that protect that hardware or add functionality to it have grown in sales as a result."

- **Billy Hulkower, Senior Technology Analyst**

On-trade Alcoholic Drinks - China

"China's on-trade alcohol market is undergoing a decline due to consumers' rising health concerns. Brands should try to associate their alcohol products with modern and healthier occasions to encourage more orders. There can also be an opportunity for special home-made alcoholic drinks as consumers continue seeking novel experiences they cannot ...

Online Retailing - France

"Online retailing in France is maturing and concentrating. As Amazon extends its reach and builds market share, domestic retailers have been looking for new ways to remain competitive and there has been some merger and acquisition activity, which is leading to a process of concentration. With the Drive click-and-collect format ...

Online Retailing - Italy

"Online retailing in Italy has been slow to develop, but is now entering a growth phase as connectivity improves, more of the population becomes accustomed to shopping online and as major international pureplayers, such as Amazon, are investing in the country. We expect online sales to grow to account for ...

Online Retailing - UK

"Whilst online accounts for a fraction of the total retail market in the UK, its influence on consumer purchases is far greater than this suggests. Whilst 2017 is likely to be tougher for the retail industry than 2016, the broader trends in the market are still in favour of online ...

OTC Analgesics - UK

Mobile Phones - Ireland

"While Irish consumers are satisfied with the coverage of their mobile phone network, there is significant interest in a website that rates providers on their network coverage. Such a website would be well received as it enables consumers to easily compare the quality of coverage offered in their local area ...

Online Retailing - Europe

"Online retailing has only played a role in the retail sector for about 15 years and rather less than that in many countries. Retailers, whether store-based or online pureplayers, are still feeling their way in many respects. It is becoming clear that online retailers cannot compete on price, they need ...

Online Retailing - Germany

"Online retailing is highly developed in Germany but online sales account for just 10% of all retail sales, partly because online grocery retailing remains underdeveloped. But recent investment and innovation made food the fastest growing online product category in 2016. If German grocery shopping habits are going to change, it ...

Online Retailing - Spain

"Online retailing is growing fast from the unpromising beginnings of a country where there was little tradition of home shopping. Everything is in place for rapid growth. All the leading retailers have an online offer and 84% of internet users shop online."

- **Richard Perks, Director of Retail Research**

Oral Care - UK

"As a hygiene essential, the category continues to experience some growth in the face of price promotions. However, a reduction in oral care routines is undermining true growth potential, with mouthwash falling from favour. A focus on reinvigorating interest in mouthwashing through new usage propositions could benefit the overall category ...

Perimeter of the Store - US

“A need to keep going at work is helping to keep the value of the category afloat, but it is increasingly under threat from consumers trading down to generic painkillers. Some adults are also turning to alternative methods of pain relief, potentially taking them away from buying OTC remedies, which ...

Pizzas - UK

“Currently, the main focus in the chilled pizza market is on increasing the range of premium options, while frozen pizza brands are trying to more closely replicate the takeaway experience. Other ways to increase the frequency of eating pizza include catering more for lunch and snacking occasions, and expanding beyond ...

Regional Newspapers - UK

“Mintel’s research highlights a strong desire for regional/local newspapers to play a more proactive journalistic role; conducting more investigative research and launching campaigns on local issues. New resources are opening up to aid such regional journalism, while greater inclusion of investigative reporting could help further open the door for ...

Restaurant Breakfast and Brunch Trends - US

“Breakfast and brunch continue to shine as bright spots in the restaurant industry. Brunch in particular has become a trendy meal occasion due to its association with relaxation, innovative dishes, and even alcoholic drinks. Operators are leveraging consumers’ interest in brunch by creating unique brunch entrées and innovative brunch cocktails ...

Sucos - Brazil

“A forte preferência pelo suco fresco no Brasil faz com que o suco embalado precise apresentar um forte diferencial para conquistar o consumidor. Inovações, como uso de ingredientes orgânicos e naturais, podem ajudar a impulsionar a categoria, especialmente entre os consumidores mais velhos, que apresentam alto interesse nesses atributos e ...

“US perimeter food categories driven by growing consumer demand for fresh ingredients and freshly prepared foods. Retailers and perimeter marketers can further accelerate growth by creating a more engaging shopping experience that emphasizes, convenience, food exploration, personal choice, and fun.”

- **John Owen, Sr. Analyst, Food and Drink**

Quick Service Restaurants and Takeaways - Ireland

“The quick-service restaurant and takeaway market in Ireland is performing well thanks to third-party delivery apps being well received by Irish consumers, making it much easier to order fast food in 2017 – even from outlets that do not traditionally offer delivery service. Looking ahead fast casual restaurants pose a ...

Researching and Buying Technology Products - UK

“Including professional reviews along with user reviews on product webpages has the potential to facilitate the purchasing decision and shorten the consumer journey to purchase, therefore boosting conversion rates and reducing the risk of dropouts. Professional reviews, expert opinions, professional video tutorials and similar initiatives could prove particularly successful to ...

Short and City Breaks - UK

“Travel brands can curate an annual portfolio of regular trips for an emerging tribe of multi-short breakers, offering a mixed programme of holiday types including R&R, hedonistic, activity/adventure and special interest, and a variety of destinations in the UK and abroad.”

– **John Worthington, Senior Analyst**

Tea and Other Hot Drinks - UK

“Although black tea is still drunk by the vast majority of people, competition from other tea types, as well as coffee and soft drinks, has chipped away at its role as Britons’ go-to day-to-day drink. Indulgent flavours could help to sidestep younger consumers’ dislike of the bitterness of black tea ...

The Millennial Impact: Food Shopping Decisions - US

"Millennials represent the largest generation group; they are estimated to make up a quarter of the US population in 2017. They are also the largest share of primary grocery shoppers, meaning their shopping motivations and needs should be used as a guide to secure the greatest reach. Flavor experience and ...

Travel Tech - US

"Technology is an integral component of the travel experience. Consumers utilize all elements of the immense travel tech landscape to help them function away from home. All-in-one mobile devices tend to house a majority of travelers' needs. Travelers use tech to initiate transactions, communicate and stay informed with travel providers ...

Western Spirits - China

"Western spirits in China generally have very low usage frequency compared to beer and Chinese spirits (ie Baijiu). However, the penetration of different types of Western spirits are actually not very low. This finding suggests companies and brands' education should focus on telling consumers the various occasions that Western spirits ...

Yogurt and Yogurt Drinks - UK

"Consumer suspicions around artificial sweeteners present a significant barrier to companies looking to reformulation to meet the sugar reduction targets. However, the appeal of less sweet-tasting yogurts offers opportunities to cut sugar without replacing it."

– Alice Baker, Research Analyst

彩妆 - China

"化妆被普遍视为是一种能提高自信的加分技能，与此同时也是表示对他人的尊重。特别是30多岁的中年女性和妈妈们，对独立成熟魅力女性的形象向往促使她们每天化妆。这是品牌可以用于鼓励彩妆使用的强有力信息。"

– 金乔颖，研究副总监

The Natural/Organic Food Shopper - US

"Certain consumer demographics are embracing the organic claim on foods and beverages, but this is found significantly more in younger consumers and parents. Other consumers appear to lack trust in the organic label, and the lack of a uniform regulatory definition for "natural" in most foods could negatively impact consumer ...

UK Retail Briefing - UK

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

Women's Clothing - US

"While the US women's clothing market is indeed large and growing, the growth is incredibly stifled. Sales should reach \$170.6 billion this year, basically flat in comparison to 2016. This continued slow pace is expected for the foreseeable future. Younger generations, with their propensity to be more engaged and ...

保险 - China

"中国贡献了全球保险市场一半以上的增长，这主要归功于国内投资者旺盛的理财需求。但原因并不仅仅如此。保险购买者，尤其是年轻人，开始认识到保险其风险保障的真正价值，反映在人们对消费型保险（如健康险）日益增长的接受度。市场契机蕴含于仍处在积累保险知识初始阶段的低线城市消费者身上。"

– 过人，高级研究分析师，中国

衣物洗护用品 - China

"尽管中国衣物洗护产品市场需求稳定，趋于饱和，但品牌依然不懈地投资推出新产品，保持对消费者的吸引力，鼓励消费者趋优购买有额外功效的产品和浓缩型洗衣液。然而衣物护理剂/柔顺剂在中国市场依然举步维艰。消费者并不熟悉此类产品的功效，而且往往对之不切实际的期待，因此品牌需要对此进行恰当的宣传推广。"

– 李玉梅，研究分析师

西方烈酒 - China

“相比啤酒和中国烈酒（白酒），中国消费者饮用西方烈酒的频率通常非常低。但不同种类西方烈酒的渗透率实际上并不是非常低。这一发现表明公司和品牌应重点向消费者宣传各种适合饮用西方烈酒的场合，以提高消费频率、鼓励试饮和趋优购买其他类型的酒精饮料。”

— 李蕾，研究分析师

餐饮娱乐渠道酒精饮料 - China

“在消费者对健康日益重视的大环境下，中国餐饮娱乐渠道酒精饮料市场持续走低。品牌应尝试将酒类产品与现代和健康场合相结合，以推动更多的点购。消费者不断寻求在家中无法复制的新奇体验，因此，特色自制酒精饮料可能是另一个机会点。”

— 陈杨之，研究分析师

速冻预加工食品 - China

“食品外送服务满足了消费者对食物多样性和便利性的需求，加之中国消费者对营养成分的了解越来越多，更乐于探索产品新种类。因此，消费者开始出于不同需求食用速冻预加工食品，并扩充新的食用场合。”