

## September 2018

### Baby Personal Care - China

"The increasing baby population and more frequent usage will fuel the market growth. However, lack of consumer education and brand differentiation leads to consumer confusion. Babies' feelings and skin issues matter most to parents, and proving safety is always the priority for brands."

– Vicky Zhou, Research Analyst

### Beds and Bedroom Furniture - UK

"A focus on the importance of sleep for emotional wellbeing has given a boost to those brands positioning themselves as sellers of sleep although some of the smaller specialists have disappeared in a rapidly changing marketplace. The emergence and rapid growth of boxed-mattress brands has shaken up the sector; but ...

### Black Haircare - US

"The Black haircare market has adjusted to the new natural hair normal. Product innovation, expanded retail distribution, and brand messaging recognize that the future of the Black haircare market is dependent on chemical-free consumers. While natural hair is the norm, Black consumers have different attitudes, beauty standards, and motivations behind ...

### Brand Overview: Retail - UK

"Amazon looms over the whole retail sector, and has raised expectations of the entire shopping experience. Brands that can innovate, such as by using technological advancements, maximising the potential of physical spaces and integrating money-can't-buy experiences into loyalty scheme frameworks could find a way to challenge Amazon's dominance."

- Richard Hopping ...

### Bread and Baked Goods - Brazil

"Brazil's bread and baked goods market has two main challenges: the consumers' health concerns and the high prices that hinder growth in volume. Brands, therefore, could invest in more healthful and higher-value-added options, such as whole-grain products free from gluten

### Beauty Retailing - US

"The US beauty industry is expected to garner sales in the range of \$57 billion this year. Common themes and trends across the industry include inclusivity to address America's diversification, clean beauty (products sans suspected toxic ingredients), simplification of beauty routines, the integration of physical and digital channels, personalization in ...

### Better For You Snacking - US

"The increasing prevalence of snacking creates an opportunity for healthier, more nutritious snacks. And with relatively low usage incidence of many newer types of better-for-you snacks, there's plenty of room for further growth. For better-for-you snack makers, new use occasions and pairings and exciting new flavors represent paths to increased ...

### Bodycare - Brazil

"Most of Brazilians use body, hand, and foot care products and deodorants only after bathing/showering. There is space, however, for several innovations in these segments. Body masks (similar to face masks), deodorant spray for the whole body and relaxing fragrances are some of the products that can boost consumption ...

### Bread - UK

"That only a minority of consumers care about good value for most occasions when they eat bread reflects the relatively small role of bread in the overall food budget. This shows the scope for operators in this market to compete on factors other than price, exploring added value attributes to ...

### Burger and Chicken Restaurants - UK

"The biggest threat to the popularity of burger and chicken is the trend of consumers cutting back on eating meat. This is being driven by Younger Millennials who have either adopted a full-time vegan lifestyle or are

and based on alternative flour. In addition, brands could invest ...

## Car Purchasing Process - China

"The sales of SUVs will continue to grow but the SUV is going to reach saturation point. It comes as no surprise that German brands dominate consumers' future car purchasing plans and that 4S stores are the major purchasing channel for consumers. However, it is a surprise to see that ...

## Coffee - UK

"Coffee drinking is ingrained among Brits, with usage on-par with the quintessentially British tea. However, a plateauing in pod machine ownership has put the brakes on coffee pods' growth and slowed the overall volume performance. Reusable pods could polish the green credentials of pod machines and appeal to those put ...

## Conferencing and Events - UK

"The conferencing and events market maintained growth in 2017 despite difficult trading conditions. Whilst the value of the industry is expected to continue along a positive trajectory, the market is likely to face increased pressure over the coming years as operators await the outcome of Brexit negotiations."

– Marco ...

## Consumer Payment Preferences - US

"Digital payments continue to garner a great deal of attention within the financial services industry, as innovation and technological advancements continue to push them forward. Consumer payment behaviors, however, are fairly engrained within older consumers. Financial services providers have an opportunity to highlight the security and efficiency of new payment ...

## Dairy and Non-dairy Milk - US

"Milk is characterized by two vastly different markets: the large but declining dairy milk market and the much smaller but fast-growing non-dairy milk market. While

simply eating more plant-based dishes. Operators now need to tackle this issue by ...

## Cheese - US

"With sales of \$23.6 billion, the cheese category's true challenge is in growing off of such a considerable sales base, since consumers already widely turn to cheese either as a snack or a recipe component. Recent years of dollar sales stagnation have been largely the result of commodity ...

## Coffee and Coffee Shops - Canada

"Canadians love coffee, though what they expect of the category varies. Some look to explore and experiment with new and different types of coffee, while for others, coffee is a ritualistic morning pick-me-up that they don't want to mess with. Whether one is actively interested in exploring new innovations in ...

## Consumer Attitudes toward Fintech - US

"Financial technology has undergone a radical transformation in the past decade. In response to the growth in online banking and smartphone ownership, financial brands have come up with new, innovative technologies that make the consumer's financial experience faster and more secure."

- Jennifer White Boehm, Associate Director - Financial Services

## Cruises - Europe

"The new high profit levels may not be completely sustained over the next ten years as there will always be moments of economic (or geopolitical) crisis when profitability suffers but the industry has shown itself to be resilient and now all the major companies have much stronger balance sheets than ...

## Dark Spirits and Liqueurs - UK

"Friend/family recommendations and tasting sessions stand out as key means to drive dark spirits trial. Companies can incentivise recommendations through

dairy milk remains a household staple for most Americans, non-dairy milk is quickly gaining popularity as a more healthful alternative to dairy milk, and innovative ...

## Diabetic Health - US

"As increasingly more Americans face a diabetes diagnosis, demand is growing for effective, reliable and affordable tools to screen, monitor, and manage diabetes. The disease is complex and often overwhelming, not to mention costly for individuals and society alike. Opportunities are especially ripe for the integration of less invasive monitors ...

## Digital Trends Quarterly- UK - UK

"The fact that nearly one in five smartphone owners use their device's camera every day highlights the extent to which taking pictures or videos is no longer something people simply do to record particular events or as a hobby, but something that's woven into the fabric of their daily lives ...

## Equity Investing - UK

"2017 was a bumper year for the equity investing market, but this is unlikely to be repeated in 2018, with Brexit looming. Competitive pressures are growing, even among the once-niche online platform providers, and the flow of new customers is inhibited by low levels of investable assets. Ethical and micro-investing ...

## European Retail Handbook - Europe

This is the 22nd edition of the European Retail Handbook. It provides basic data about all the major European countries, their economies and their retail sectors. The handbook complements Mintel's major sector reviews, such as DIY, Supermarkets and Clothing, adding more detail and information about smaller economies.

## Fragrances - US

"After several years of lackluster sales performance, the US fragrance market continues to see sales slip. Cross-category competition and disengagement among key

rewards such as discount vouchers and marketing messages themed around knowledge sharing. Meanwhile sampling initiatives would help to overcome the barrier of spirits' high price discouraging experimentation among risk-averse ...

## Digital Trends (Hardware) - US

"In the modern tech market, efficient devices are expected and consumers are increasingly looking for connection between devices to contribute to a cohesive experience. Hesitation toward new, unproven technology has hindered growth in emerging categories, but advancements in displays and voice assistance have increased demand for upgrades on products that ...

## Eating Out Review - UK

"Foodservice operators that base their strategy around promotions are not doing enough to stand out. Brands also need to show that they care about the well-being of their customers by responding with menu choices that cater to healthy lifestyles."

- **Trish Caddy, Foodservice Analyst**

## European Retail Briefing - Europe

**This month's European Retail Briefing includes:**

## Food and Non-food Discounters - UK

"Overall the discount sector remains one of UK retail's key growth areas. However, it is increasingly becoming a tale of two sides. The food discounters continue to put on exceptional growth, helped by store openings and the success of newer ranges such as premium. On the non-food side growth continues ...

## Healthy Lifestyles - Healthy Ageing - Ireland

demographics have hindered category growth. In spite of category challenges, there are pockets of growth in e-commerce fragrance brands, customized fragrance, and aromatherapy."

## Hispanic Cooking Enthusiasts - US

"Hispanics over index for enthusiasm toward cooking. Their enthusiasm is not only reflected in the time they spend in the kitchen, but in how they choose to spend that time and who they cook for. Their cooking approach is continually evolving and influenced by people close to them, as well ...

## Innovations in Travel - Canada

"Most Canadians have taken a leisure trip in the past 12 months, with travel in Canada being most common. Close to a third of Canadians took a leisure trip internationally (excluding US), which is close to on par with those who travelled to the US for the same purpose. The ...

## Later Life Financial Planning - UK

"The financial pressures on future retirees pose a big challenge in terms of engaging them with later life planning, as they're more likely to be concerned about the sufficiency of their pension pot. However, this gives advisers opportunities to discuss different funding options, whilst products that can save people money ...

## Leisure Centres and Swimming Pools - UK

"The public leisure centre and swimming pool industry may have to experience a short-term downfall to make a long-term gain. Investments are required to ensure the whole estate is up to the standard that consumers expect. It is important that operators stay relevant and provide users, many of whom are ...

## Marketing to Moms - Canada

"The appearance of wrinkles is one of the most common signs of ageing and Irish consumers, particularly women, are turning to anti-wrinkle cream to revitalise their skin. However, as the majority of consumers agree that a lot of anti-ageing products oversell their effectiveness, 'positive ageing' messaging that emphasises healthy skin ...

## Hotels in Russia - Russia

"The pipeline of branded hotels under development in Russia is growing, with AccorHotels and Hilton leading the way. In May 2018, Tophotel.news, an online hospitality news portal, cited a total of 108 projects, which will bring 21,820 new hotel rooms to Russia over the period 2018, 2019, 2020 ...

## Jewellery & Watches Retailing - UK

"The UK jewellery and watches market has continued to see strong value growth, but this is largely due to continued demand for luxury and high ticket items. The mid-market brands and retailers are suffering from many of the same issues as other fashion and high street retailers, such as growing ...

## Laundry Detergents, Fabric Conditioners and Fabric Care - UK

"In its bid to reverse rapidly falling value, laundry detergent brands have upped their focus on innovation that aims to reduce consumers' repertoire of laundry care products. However, in doing so, the fabric conditioners and fabric care markets are now under threat. Increased focus on skin health and the environment ...

## Lifestyles of the Over-55s - UK

"Recent years have seen an increase in the inclusion of older demographics in marketing, particularly in the fashion and BPC (Beauty and personal care) markets, but it remains far from standard. As the senior population continues to grow it is crucial for brands to recognise the full potential of marketing ...

## Meat and Meat Substitutes - Ireland

"Canadian moms pride themselves on being reliable (74%) and see themselves as being more successful than a 'typical' mom in terms of managing stress and time. Having said this, guilt looms when allowing time for themselves. Moms are reliant on other moms as a key resource contributing to their success ...

## Meat-free Foods - UK

"The UK's overarching health trend and the focus on the environmental impacts of meat production have underpinned strong growth in the meat-free foods market. 'Clean labels' and greater clarity over the ingredients used are needed to build consumer trust, while innovative products targeting the 'foodie' consumer can inject more excitement ...

## Media Trends Autumn - UK

"Across media markets consumers have become very comfortable with the subscription payment model and they show a willingness to sign up to multiple types of subscriptions, with expense the primary barrier to doing so. The video subscription market in particular is set to undergo significant changes over the coming years ...

## Men's Beauty and Grooming Routines - China

"The men's facial skincare market achieved stable year-on-year value growth as the importance of appearance maintenance is widely acknowledged among men. But given men's overall low usage frequency and simple routines, brands need to make more efforts to help men establish regular skincare routines and drive usage frequency of core ...

## Nut-based Spreads and Sweet Spreads - US

"Products in the \$3.9 billion nut-based and sweet spreads category enjoy nearly universal penetration as well as solid consumption frequency, in large part due to the popularity and dominance of peanut butter. Yet sales growth has been modest in the past five years for both segments, likely an implication ...

## Pest Control and Repellents - US

"With one in five Irish consumers identifying themselves as being vegan, vegetarian or a flexitarian in 2018, the opportunities for future growth in the meat substitute sector are high. Moving forward a key challenge will be providing consumers with natural, less processed meat substitutes to gel with rising concerns with ...

## Mechanical and Electrical Engineering - UK

"M&E contracting is a significant element of the wider construction sector. Technology and legislation surrounding climate change and building regulations are driving market growth and opportunities, while the trend to regular maintenance has extended beyond the commerce and industrial sectors to the residential market."

## Menu Insights - China

"Despite being a fragmented market, stricter regulations are going to help ease food safety concerns. Amid interest in trying different ethnic cuisines, consumers are also beginning to combat over-flavouring. Their perception of nutrition of certain ingredients, be it superfoods or meat, can very much affect their decision-making. Although their desire ...

## New Cars - US

"New vehicle sales are stagnant in terms of growth and the market has shifted toward more profitable crossovers and SUVs. Brands have introduced more and more models into the category to take advantage of shifting consumer needs and preferences. While the new vehicle market has shifted toward a new vehicle ...

## Peer-to-peer Business Finance - UK

"P2P lending platforms must continue to attract new funding sources and new borrowers. However, achieving both at the same time is not a formality – platforms may have a strong supply of funding available but lack 'high-quality' or suitable borrowers, or vice-versa. A slowdown in either of these will affect ...

## Plumbing - UK

"The pest control market has slowed. While there are heightened concerns about insect-borne diseases, the market is maturing. Consumers are trading down to private label products, while more depend on professional services, which have moderated growth of the consumer product side of the market.

The long-term prospect for the market ...

## Poland Outbound - Poland

"The Poland outbound market is young and dynamic, driven by the country's strong economic performance. Sun and beach holidays are high on the agenda, as is common among first-generation travellers. Visiting friends and relatives [VFR] is also prominent due to the large Polish diaspora living overseas and the lower cost ...

## Recruitment - UK

"The recruitment market continued to defy expectations in the past year, overcoming fears of a potential drawback in hiring to further its period of growth. This ongoing air of uncertainty, and the hesitancy introduced, continues to shape activity in the market, primarily through the surging popularity of temporary recruitment. The ...

## Salon Services - US

"While routine maintenance is a top reason for seeking salon services, resulting in many being loyal to the same destinations and professionals, other reasons for receiving services exist. The desire to pamper or seek services for social activities could motivate some consumers to consider alternative destinations, such as at-home treatments ...

## Shopping in Duty-free Stores - China

"Consuming scenario's extension and expansion determines the success of duty-free retailers. Consumers are no longer only satisfied by the on-site shopping experiences; on-site enjoyment and off-site services will become important to drive purchase. Moreover, duty-free retailers need to properly position brand as well as set clear marketing strategy to build ...

"Plumbing products are highly reliant on the R&M market, though new construction growth is also boosting demand and legislation is a determinant in the heating sectors. Against these positive influences, increases to interest rates and the potential for house price inflation/moving activity to dampen following Brexit will reduce the ...

## Produtos para Cuidados com o Corpo - Brazil

"A maioria dos brasileiros usa produtos para o corpo, mãos e pés e desodorantes somente após o banho. Porém, há espaço no mercado para diversas inovações nessas categorias. Máscaras corporais (assim como as que existem para o rosto), desodorantes em formato spray para todo o corpo e produtos cujas fragrâncias ...

## Restaurant Breakfast and Brunch Trends - US

"Breakfast habits are shifting to fit consumers' busy schedules and include more snacking, less traditional breakfast foods, and eating on-the-go during the morning hours. Operators should stress the productivity and health benefits of breakfast to appeal to the growing number of young consumers less likely to prioritize the morning meal ...

## Shaving and Hair Removal Products - US

"The highly saturated shaving and hair removal products market is estimated to reach \$3.5 billion in total 2018 retail sales, declining by 3.9% from 2017. Although usage of razors is nearly universal, the value-driven nature of the category, shifting expectations of shaving and hair removal, and increased competition ...

## Small Business Banking - UK

"Switching is rare in the small business current account market. However, business owners' attitudes towards challengers suggest there are opportunities for smaller and newer providers to grow their share of the market. For example, 57% of small business owners would be willing to use an online-only or app-based provider. If ...

## Social Networks - China

“Although dominating positions rarely change, the social network market is changing fairly fast regarding functions: newsfeeds and short videos are introduced to better generate ad revenue, while dominator WeChat is building its operating system to keep its users. Also, social network shopping, grown on the grounds of online shopping, should ...

## Sports Participation - UK

“With participation rates effectively static, growing the player base is now a common challenge for all sports. Breaking down barriers to play, however, will require an individual rather than collective approach as their strength and nature vary significantly from activity to activity.”

– **David Walmsley, Senior Leisure Analyst**

## Streaming Media - Ireland

“The value of the media streaming market continues to grow in Ireland, as consumers increasingly prefer to access content via streaming services compared to traditional means. Some consumers, however, would be willing to accept advertising on paid streaming services in return for a discount on their subscription.”

– **James ...**

## Technology Habits of Generation Z - UK

“Generation Z is characterised by having grown up with near-constant access to technology and a wealth of digital services in their everyday life. They are heavy users of instant messaging services, and these are likely to play an important role in the future of how brands interact with customers. Meanwhile ...

## The Leisure Outlook - Quarterly Update - UK

“Consumers are reprioritising their leisure spending towards sharing experiences and habitual leisure activities, including frequent visits to pubs for drinks, working out in a gym and buying takeaways. Meanwhile, England’s success in the FIFA World Cup combined with the recent heatwave has helped boost the UK leisure economy.”

## Solar Panels - UK

“The UK solar PV sector faces significant challenges as a result of government policy changes. However, the sector is expected to return to growth in a post-subsidy world as the cost of solar PV continues to fall, and more efficient and affordable battery storage solutions and more innovative finance and ...

## Spreads and Dipping Sauces - China

“Ingredients are the most crucial factor in consumers’ decision-making process, with 52% of consumers saying they would like to buy spreads or dipping sauce if the product uses natural ingredients. However, a great number of consumers aren’t willing to compromise on healthiness for better flavours, suggesting opportunities for healthy products ...

## Tea and RTD Tea - US

“The vast majority of adults drink tea and many are daily tea drinkers. The complex array of tea formats, varieties, and flavors offers options that appeal to a broad spectrum of consumers. Yet category sales improved only slightly from 2017-18, as sales softened in the leading canned/bottled RTD (ready ...

## Televisions - UK

“Take-up of Ultra HD 4K televisions has been evident in the last year and a focus on World Cup promotions will have provided a further boost to sales. However, it will not be sufficient to prevent a decline in market value, with the majority of people keeping televisions until they ...

## The Private Label Food Consumer - UK

“Despite facing undeniable – and significant – headwinds, it is by no means all doom and gloom for brands. Nurturing perceptions of offering the ultimate in enjoyment, a unique taste, superior quality, and exciting flavours will be key to promoting brand loyalty. That brands are still seen to have the ...

- ...

## The Recreational Cannabis User - US

"As of July 2018, nine US states and the District of Columbia have legalized cannabis for recreational (adult) use, and moves toward expanded legalization are underway. This has and will continue to impact some food and drink categories. Already, 34% of cannabis users have decreased alcohol consumption since legalization, likely ...

## UK Retail Briefing - UK

**This month's UK Retail briefing includes:**

## Vehicle Recovery - UK

"The vehicle recovery services market has seen steady growth in recent years. However, with a downturn in car sales and a possible slowdown for the UK economy as it approaches departure from the EU, the sector is likely to enter a more challenging period. Competition may well intensify, necessitating well ...

## Vitamins and Supplements - Brazil

"Brazil's supplements market goes through a historic moment, with the implementation of a specific legislation for the sector. The new rules should help raise the perception of quality and safety of the products, whose benefits will be scientifically proven. Manufacturers, however, should be aware they will need to redouble ...

## Vitamins, Minerals and Supplements - US

## Travel Tech - Canada

"With technological devices playing a more and more important role in the everyday lives of consumers, it is important to understand how tech is used outside the day-to-day, and more specifically, how consumers utilize technology when they are travelling. Tech has long been a part of travel – from portable ...

## Understanding Consumer Usage and Attitudes toward Subscription Services - US

"Subscription services are evolving as more companies across a variety of product categories are in or entering the market. Consumers have interest in signing up for product subscriptions; however such programs must be tailored in a way that makes the consumer's life easier and adds value. Product quality and quantity ...

## Vitaminas e Suplementos - Brazil

"O mercado de suplementos no Brasil passa por um momento histórico, ao receber uma legislação específica para o setor. As novas regras devem ajudar a elevar a percepção de qualidade e segurança dos produtos, que terão seus benefícios para os consumidores cientificamente comprovados. Todavia, os fabricantes precisam ficar atentos, pois ...

## Vitamins and Supplements - UK

"The ongoing consumer focus on health and the continued success of demographic-specific supplements have supported growth in the vitamins and supplements category. However, with the majority of adults questioning the health promises made, improving trust is needed if the category is to grow its market penetration. Meanwhile, personalised subscriptions could ...

## 免税店购物 - China



"The pace of growth for the VMS (vitamins, minerals, and supplements) market remains steady, as sales are estimated to increase by 5.1% in 2018, reaching \$24.5 billion. Yet consumer emphasis on value and lack of product understanding are a challenge to the category. To best position themselves, category ...

## 婴幼儿护理用品 - China

"婴幼儿数量增多以及产品使用频率提高将推动市场增长。但由于缺乏消费者教育和品牌差异，消费者往往会感到无从下手。家长最关注婴幼儿的使用感受和皮肤问题；证明安全性始终是品牌的任务重心。"

— 周文棋，研究分析师

## 涂抹酱和蘸酱 - China

"消费者在购买决策过程中最看重产品原料，52%的消费者表示愿意购买纯天然原料的产品。但是，很多消费者不愿意为了健康而牺牲美味，说明兼具美味和健康的产品将大有市场机遇。"

— 李润阳，研究分析师

## 社交网络 - China

"虽然社交网络市场上的主导企业地位难以动摇，但是该市场提供的功能却在快速转变：为了更进一步创造广告收益，平台纷纷融入信息流和短视频功能，而主导平台微信则通过打造操作系统以维系用户。此外，基于线上购物的社交网络购物也不容忽视。"

— 黄一鹤，研究分析师

"免税零售商的成功取决于消费场景的延伸和扩展。消费者不再满足于实地的免税购物体验；愉悦的现场体验和后续服务将成为带动消费的关键因素。此外，免税零售商需要对品牌进行精准定位，制定明确的营销策略，提高在消费者中的认知度和客群的忠诚度。"

— 陈泓月，高级研究分析师

## 汽车购买过程 - China

"SUV销量会继续增长，但将达到饱和点。德国品牌主导消费者的未来购车计划，以及4S店主导消费者的购买渠道选择都在情理之中。不过，出人意料的是，中国品牌在过去一年增长迅猛。停车辅助成为消费者今年青睐的汽车必备选项。"

— 周同，研究分析师

## 男性美容护理流程 - China

"男性面部护肤品市场年同比增长稳定，因为外貌保养的重要性得到了男性的广泛认可。但由于男性整体上产品使用频率低，护肤流程简单，品牌首先需要做出更多努力帮助男性建立日常的护肤流程，增加核心产品的使用频率，然后再推出更小众的男性产品，比如化妆品。"

— 李玉梅，高级研究分析师

## 菜单洞察 - China

"虽然餐饮服务业市场分散，但是未来将有更严格的法规帮助消除对食品安全的疑虑。消费者虽然有兴趣尝试各国的外国菜，但也开始拒绝过度调味。消费者如何看待食材的营养成分（不论是超级食物还是肉类）可能会直接影响他们的决策。虽然消费者很想要自己决定餐点的甜度或辣度，但他们在面对菜单时还是期待能得到更多的解释和指导。"

— 吴丝，研究分析师