

### December 2015

#### Consumers and the Economic Outlook: Quarterly Update - UK

"Mintel's key measures of consumer confidence show that people are still wary. Although the improvements in sentiment that accompanied the end of the income squeeze have been sustained, 2015 has been a year of consolidation, rather than one of soaring consumer spirits. Earlier in the year, the election added ...

#### The Budget Shopper - US

"Several years after the recession, the economy is stronger, and people are beginning to work, to buy and to live more freely again. Unfortunately for retailers looking to make a profit, consumers' expectations for fair prices have not waned."

#### Complementary and Alternative Medicine - UK

"The CAM market has enjoyed relatively strong sales growth in recent years, bolstered by an ageing population seeking musculoskeletal treatments and the booming healthy living trend. Opening CAM treatment centres in business districts and shopping centres could now help to increase accessibility to the market, whilst further promotion on online ...

### November 2015

#### Supermarkets - UK

"The grocery superstores are losing market share and the main focus of this report is to examine why. We think that there are underlying socio-economic changes taking place which allied to the growth of the hard discounters, Aldi and Lidl, is leading to growth in more frequent shopping trips and ...

#### Health and Fitness Clubs - US

"Health club revenues have increased substantially since 2010, and due to a general consumer focus on health

#### Natural and Organic Personal Care Consumer - US

"Natural and organic personal care brands offer a variety of options that are largely appealing, though consumers express some confusion due to the prevalence of natural claims, limited regulations, and a less than clear category definition. However, consumers are concerned about green issues, and aspire to live a healthier lifestyle ...

#### Small Kitchen Appliances - US

The small kitchen appliance market has seen solid growth from 2010 to 2015, driven by lifestyle motivations, such as interest in healthier living and at-home cooking, as well as product innovations. Replacement continues to be the top purchase motivator, but interest in new features, such as technology and design, offer ...

#### The Laundry Consumer - UK

"Washing and drying behaviour when doing the laundry can have a significant influence on usage of laundry detergents and fabric care products, with a number of elements of people's laundry routines interacting together to determine what products they buy. Key issues for consumers are performance, speed and energy efficiency, and ...

#### Household Surface Cleaners - US

"The mature household surface cleaner market has experienced only modest growth in recent years. Still, while consumers continue to take a budget-conscious approach to shopping for household surface cleaners, they place importance on housecleaning and are as interested as ever in products that allow them to clean more quickly and ...

#### Floor Cleaning and Care - UK

"Continuing innovation combined with a willingness among consumers to pay more for added features or buy

## Household and Personal Care - International

and wellness, revenues are projected to continue in an upward trend into 2020.

This report will illustrate the qualities consumers seek from health and fitness clubs. Readers will gain a sense of what ...

### Suncare - UK

"Usage of suncare protection continues to be dependent on the weather, with value falling across 2014-15 in line with lower levels of sunshine. Looking forward, suncare brands can further align themselves with the skincare category in order to position their products as an integral part of a daily skincare routine ...

### Personal Care Consumer - US

A mature personal care market benefits from widespread product usage of functional items such as oral care and deodorant, while younger women drive growth of discretionary items including facial skincare. Brands can benefit by focusing on gentle products or natural sounding ingredients, which appeal to consumers amidst concerns over ingredient ...

## October 2015

### Vacuum Cleaners - US

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

### Shaving and Hair Removal - US

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

### Pest Control and Repellents - US

secondary products in addition to their main vacuum cleaner have helped to drive strong growth in floor care sales. Cordless ranges have been a particular focus of NPD activity and have more room to ...

### Water Filtration - US

From 2010-15, US retail sales of water filtration products have fallen nearly 1%, reaching an estimated \$807 million in 2015. While sales in the water filtration device segment showed modest growth from 2013-15, sales in the water filter segment dropped sharply. The availability of acceptable tap water and the convenience ...

### Healthy Lifestyles - US

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

- Lauren Bonetto, Lifestyles & Leisure Analyst

### Diet Trends - US

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

### Gluten-free Foods - US

## Household and Personal Care - International

"Warmer weather trends mean higher pest activity and incidence of pest-borne diseases. While consumer concern about pest-borne disease is relatively low, increased incidence of West Nile Virus, Lyme disease, and other diseases could mean greater concern if warmer weather patterns persist. Family households are most apt to use products and ...

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

### Men's Personal Care - US

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

## September 2015

### Marketing Health to Men - US

"More than half of men consider themselves healthier today than they were a year ago, yet men remain most at risk for many health problems. When it comes to managing their health men rely on exercise, a positive mental attitude, and VMS (vitamin, mineral, or supplement). Motivation is the greatest ...

### DIY Home Improvement and Maintenance - US

The DIY home renovation market is on the rise in an improving economy as more consumers engage in discretionary projects to fix up their homes. Prospects for continued growth look good as the emerging generation of new DIYers engages in projects that allow them to add a personal touch to ...

### Food and Non-food Discounters - UK

"In both food and non-food retailing discounters are making a big impact and they still have some way to go. We expect a period of consolidation in non-food discounting which will begin with Poundland absorbing 99p Stores. But even with that bonus Poundland and its multi-price peers led by B&M ...

### Vitamins and Supplements - UK

"Value sales of vitamins and mineral supplements flatlined in 2014, as reduced NPD (New Product Development) and a shift towards healthier diets impacted consumer interest in the market. Sales of demographically targeted vitamins continued to fare well, however, reflecting the consumer desire for personalisation."

### Vitamins, Minerals and Supplements - US

Traditionally, sales in the vitamins, minerals, and supplements market have been driven by older consumers who are more engaged in the category. Now, brands are attempting to increase use among younger adults by focusing on short-term benefits, such as vitamins that address beauty concerns as well as provide energy or ...

**August 2015**

### **Marketing Health to Women - US**

"Half of women consider themselves healthier today than they were a year ago. Generally, women are engaged in some aspect of their health – whether taking a vitamin, mineral or supplement, eating a healthy diet, exercising, or staying positive – yet express the most concern over the effects of stress ...

### **Home Laundry Products - US**

Sales of home laundry products continued a slow decline in 2015 as consumers took advantage of discounts and promotions and other ways to save money. Still, ample opportunities exist in the \$12.4 billion category for marketers and retailers that offer consumers ways to simplify the laundry process and improve ...

### **The Green Household Consumer - UK**

"Performance and price dominate consumer considerations when it comes to shopping for household care products, with other factors, including environmental impact, falling by the wayside. A focus on the potential health benefits of eco-friendly formulations in addition to their minimal impact on the environment could help to drive consumer interest ...

### **Eyeglasses and Contact Lenses - US**

"Strong sales of contact lenses, driven by more widespread use of daily contacts and higher consumer spend, have boosted the eyeglasses and contact lenses market. The market will likely experience further growth due to an aging population as well as product innovations that address a wider variety of vision concerns ...

**July 2015**

### **Digestive Health - US**

"The OTC digestive health market experienced solid growth, posting gains since 2013, with similar growth

## **Household and Personal Care - International**

### **Consumers and the Economic Outlook: Quarterly Update - UK**

"The generally positive outlook of the economic climate, and the benefits that are gradually being witnessed at the individual level, means that the people of Britain are finally regaining their confidence. For the first time since the economic downturn, Mintel's data shows that more people feel better off compared to ...

### **Black Consumers and Haircare - US**

"Haircare is perhaps one of the largest areas of consumer expenditures among Black consumers. Hair is an important part of Black consumers' image – it shapes their identity and sends a signal to the world of who they are as a person. With the variety of ways that Black consumers ...

### **Laundry Detergents and Fabric Care - UK**

"A focus on fragrance and more premium products has helped encourage shoppers to trade up and expand their product repertoires; in-wash scent boosters and antibacterial laundry cleaners in particular have created new product categories and helped return the market to growth. The next challenge for the sector is to encourage ...

### **Shopping for Household Care Products - US**

## Household and Personal Care - International

trends expected through 2020. The majority of consumers turn to some form of OTC digestive aids to treat gastrointestinal distress, with antacids accounting for the largest share of all digestive health remedy sales. Looking forward ...

Long after the official end of the recession, getting the lowest price remains a key objective of household care product shoppers. This interest in savings, along with retailers' and manufacturers' willingness to play into it with discounts and promotions, helps to explain why most major household care categories have experienced ...

### Healthy Dining Trends - US

As Americans continue to be plagued with chronic diseases, such as obesity, cardiovascular issues, diabetes, etc, there is rising interest on the part of consumers to eat for better health. Since they visit restaurants so often, they seek better-for-you (BFY) restaurant foods. However, foodservice operators still struggle with providing foods ...

### Health and Fitness Clubs - UK

Nearly four fifths of UK adults have at least one health or fitness goal, yet only 12% currently use a gym. However, the indications for the private health and fitness club sector remain promising, with the continued rise of budget gyms helping to break down the barriers associated with more ...

### Shopping for Household Care Products - UK

"Competition for spending in the household care market has been increasing, with the growth of discount retailers as a source of purchase posing a threat to the dominance of the big four supermarkets. Promotional offers will therefore remain a key weapon in the battle to retain customer loyalty, including those ...

### Contraceptives - US

"After years of focusing on protection benefits, contraceptive brands have shifted to promoting other sensorial benefits, helping to stabilize category growth. The market is driven largely by male condom sales; however, with the recent change in OTC availability of emergency contraceptives, sales improved for the female contraceptive segment as well ...

### Home Linens - US

"Opportunities exist in the home linens category for brands to emphasize product innovations, such as linens that prevent bed bugs or that improve sleep, as well as focusing on quality in order to attract consumers. Brands can also market toward younger consumers aged 18-44, who are in need of a ...

## June 2015

### Cleaning the House - US

"While Americans' lives may be busier than ever, they continue to carve out time for housecleaning, reflecting the importance they place on keeping their homes clean. The amount of average time adults spend cleaning the house in a typical week confirms an ongoing opportunity for household cleaning products that help ...

### Analgesics - US

"The OTC analgesic market is stable, posting steady gains since 2013, with similar growth trends expected through 2020. The majority of consumers turn to some form of OTC analgesic to treat pain, with internal analgesics remaining the dominate choice for pain relief, though external analgesics are experiencing rapid growth. Looking ...

### Pet Supplies - US

### Air Care - UK

## Household and Personal Care - International

"Pet supply manufacturers and retailers face a challenging environment. Pet ownership is growing primarily on the basis of population expansion rather than historical rises in ownership penetration. Private label brands are also seeing share growth. However, opportunities remain in the market, surrounding increasing concerns about safety and the increasing perception ...

"The focus of the market on the launch of new fragrance ranges, including seasonal and limited edition scents, has increased consumer choice and helped drive replenishment sales. However, in order to further increase spending, brands in the market need to concentrate on encouraging usage of a wider repertoire of complementary ...

### Oral Care - UK

"Whilst the essential nature of oral care products means that usage is relatively high across most demographics, there remains an opportunity for oral care brands to grow sales by targeting marketing and NPD at seniors and men, helping to make them more engaged with the market overall."

– Jack ...

## May 2015

### Dishwashing Products - US

"While dishwashing product sales have outpaced those of most other household care product categories in recent years, category growth slowed in 2014, indicating that price competition has grown more intense. Accelerating sales growth beyond this modest pace may require more compelling new product launches in both segments. Dishwashing liquid brands' ...

### Heart Health - US

About 85.6 million Americans are living with some form of CVD (cardiovascular disease), also known as heart disease, which includes HBP (high blood pressure), heart attack, chest pain, heart failure, and the after effects of stroke. CVD is the leading cause of death in the US as well as ...

### Oral Care - US

"Sales within the oral care market remain steady, benefiting from widespread product usage. Opportunities exist in the \$7.2 billion category for brands to increase the frequency of product usage, especially through portable oral care products, and a focus on new product innovations within the floss/accessories/tools segment. Additionally ...

### Dishwashing Products - UK

"In hand dishwashing, the development of more powerful washing-up liquids that remove the need for excessive scrubbing or the soaking of dishes and pans can help to add value to the market

### OTC Analgesics and Cold and Flu Remedies - UK

"In 2014/15 the UK cold/flu remedies market benefitted from the seasonal flu vaccine being less effective than usual, resulting in many lapsed users returning to the category. Cold/flu remedy brands could now use this to their advantage, using marketing and product developments to reignite interest in the ...

### Consumers and the Economic Outlook: Quarterly Update - UK

"Economic improvements are finally beginning to be felt at the consumer level. Falling prices of essentials and rising wages are helping incomes go further and there are indications that people are beginning to relax their budgets and spend on items and experiences that have been out of reach during the ...

### April 2015

#### Residential Flooring - US

"An improving economy and a strengthening home renovation market have helped the \$21 billion residential flooring market notch steady gains since 2010. Looking ahead, further improvement in the broader economy should help drive continued growth. While the need to replace old or worn out flooring is the most commonly cited ...

#### Cough, Cold, Flu and Allergy Remedies - US

"OTC manufacturers of cough, cold, flu, and allergy remedies have built-in demand: there is no shortage of cold, flu, and allergy sufferers. While providing relief is important, further investment should be made in finding more effective remedies and in promoting methods for reducing the transmission of infection. These efforts will ...

#### Cleaning the Bathroom - UK

"Room exists in the market for brands to focus on the promotion of both products with multiple benefits to cater for the different aspects of bathroom/toilet cleaning and specialist products focused more on protection and bathroom maintenance. Focusing on the importance of a clean bathroom for good health and ...

### March 2015

#### Shopping for Major Appliances - US

"The major appliance market has rebounded in recent years, driven by improvement in the overall economy and in the real estate and home renovation markets. Low prices remain an essential part of the major appliance shopping process, but a variety of other factors come into play as well and provide ...

#### Air Care - US

"To help encourage growth, market players must combat cannibalization within the category by promoting

#### Disposable Baby Products - US

"As long as birth and fertility rates remain flat, maximizing growth through 2019 may hinge on attracting consumers ready to invest more, on high-end products, which may include natural and customizable offerings. Opportunities for growth appear strongest with first time parents and Hispanics, whose attitudes reveal a level of interest ...

#### Women's Haircare - UK

"The women's haircare market is challenged by changing product usage, with traditional styling products falling from favour and natural botanical oils threatening leave-in conditioners and serums. Inspiring an older female audience and expanding product repertoires are essential for returning the market to a faster pace of growth."

#### Shampoo, Conditioner and Hairstyling Products - US

"The shampoo, conditioner, and hairstyling product market is stable, posting steady gains of 2-3% on a yearly basis since 2011, with similar growth trends expected through 2019. Current hairstyle trends and consumer perceptions of having healthy hair are driving sales of conditioners, shampoo alternatives, and smoothing products. Looking forward, category ...

#### Smoking Cessation and e-cigarettes - US

"The smoking cessation products and e-cigarettes market is in a period of flux, as e-cigarettes continue to gain mainstream acceptance and the NRT category adapts to a new pool of potential customers. Brands that can adapt to meet the needs of more consumers in more ways will be able ...

#### The Private Label Beauty Consumer - UK



## Household and Personal Care - International

complementing suites of products for greater efficacy, focus on improving the multifunctional capabilities of air care products.”

### Cleaning the Kitchen - UK

“As well as concentrating on increasing sales through encouraging more frequent usage of kitchen cleaners for a range of tasks around the kitchen, brands should focus on product development in antibacterial products to cater for strong interest in all-natural and longer-lasting protection. Opportunities also exist for driving added value through ...

### Babies' and Children's Personal Care Products, Nappies and Wipes - UK

“As the baby boom shows evidence of coming to an end, it may be more relevant for the category to focus on toddlers rather than new-borns. Extending product ranges for older children and offering greater product segmentation by age could be a way to ensure the category shows growth. Greater ...

“The media attention given to beauty products launched by discount retailers, along with a high level of NPD in the sector, has seen own-label colour cosmetics soar in popularity, taking a 53% share of the private label beauty market in 2014. However, at a total level, the private label beauty ...

### Grilling and Barbecuing - US

“Grill companies need to put the ‘fun’ in functional. Most consumers see grills as cooking tools akin to kitchen appliances, but they do not always think grills are worth the cost. Companies that want to counteract this negative perception, increase brand loyalty, and increase sales must position grills as useful ...

## February 2015

### Soap, Bath and Shower Products - UK

“Retail sales declines are evident for the second year in a row in the soap, bath and shower (SBS) market (-1.2% to £638 million in 2014) as the trend of saving money on day-to-day hygiene essentials continues; consumers are maintaining their reliance on price promotions, as well as trading ...

### The Drug Store Shopper - US

“Retail channel lines continue to blur with more outlets like mass merchandisers and supermarkets clambering to become consumers’ primary destinations for their drug store needs including OTC and prescription medications. Traditional drug stores can no longer afford to be just drug stores, and should continue evolving their positioning as health ...

### Household Paper Products - US

“While a budget-conscious mindset among household paper product purchasers has kept sales growth in check, opportunities exist for brands and retailers to offer value in the form of superior quality, added benefits, and new use occasions.”

– **John Owen, Senior Household Analyst**

### Consumers and the Economic Outlook: Quarterly Update - UK

“People are finally starting to feel the benefit of the recovery in their pay packets. After five years, average wages are finally increasing more quickly than prices. Although this will take time to feed through into consumer confidence, there are signs that spending habits are changing.



## Household and Personal Care - International

### OTC Sleep Aids - US

“Building market share may require more granular outreach to consumers and targeted marketing to address the different needs, interests and concerns of young, active, tech-savvy 18-35-year-olds; busy parents and aging baby boomers. Key opportunities may lie in areas such as promoting natural products, mobilizing the insights offered by wearable fitness ...

### Soap, Bath and Shower Products - US

“The soap, bath and shower category continues to grow steadily as a fundamental element of personal hygiene. Opportunities do exist for makers and marketers of soap, bath and shower products to improve transparency and efficacy claims, focus on the differentiated needs of the multicultural consumer, and address efficiencies in product ...

## January 2015

### Living Room Hardware - US

“Having become acclimated to a touch-based and cloud-oriented experience on tablets and smartphones, consumers are expected to yearn for a similar experience in their living room. The industry is supplying that experience in spades.”

– **Billy Hulkower, Senior Technology and Media Analyst**

### Cleaning for the Family - UK

“In promoting cleaning products to families, campaigns most likely to appeal are those focused on making the most disliked tasks less of a chore and those reassuring parents that products can help to safeguard the family home in terms of being safe to use around children and maintaining hygiene.”

### Deodorants - UK

“Older people have traditionally not been a major target for deodorant brands due to their leading less active lifestyles than young adults, meaning that they consequently sweat less. However, with seniors leading increasingly active lifestyles, in terms of both doing

### Household Paper Products - UK

“Paper products suffer from being seen as commodity items that are bought mainly in response to special offers and finding the cheapest price, making sales growth difficult to come by. Kitchen roll offers the best prospects for adding value to the market through encouraging usage for a wider range of ...

### Smoking Cessation and E-cigarettes - UK

“Vaping has become a lifestyle choice, whether by choice due to health or money-saving benefits, or from long-term use as a smoking cessation method. Changing legislation will help consumers understand how to use it as a smoking cessation method, which may impact long-term usage. The smoking cessation market could learn ...

### Household Care Packaging Trends - US

“Household care product packaging can do much more than just hold and dispense the product. Innovative packaging features can become an important part of the usage experience and a way for brands to set themselves apart.”

### Beauty Retailing - UK

“Department stores look most at risk from the growth in online-only retailers because both channels are biased to branded merchandise (particularly premium/luxury labels) which makes it easier for shoppers to compare prices. Where price is a major factor then people are more likely to choose the pure player over ...

### Managing Your Health - US

“How people manage their personal health is rapidly changing, due to advances in technology, a proactive mentality on the part of consumers, and a wide range of sources where people can get professional treatment.”

– **Emily Krol, Health and Wellness Analyst**



## Household and Personal Care - International

more exercise and helping with raising their grandchildren, brands could ...

### Food Storage and Trash Bags - US

“Food storage and trash bag sales are expected to grow steadily in the next few years. Market players could generate more incremental sales by developing and launching innovative new food storage and trash bag products, putting a stronger emphasis on consumers’ use of food storage products away from the home ...