

## October 2016

### Activewear - US

The activewear sector is thriving in an otherwise soft apparel and footwear market. Although nearly three quarters of Americans are overweight or obese as of 2014, the onset of fitness trackers and other wearables is helping to positively influence change when it comes to health management. This should lead to ...

### Air Travel - Canada

"Operators in the passenger airline industry in Canada are facing a changing environment of evolving preferences and consumer demand. While some consumer behaviours surrounding and attitudes towards air travel are largely generational, the consensus among consumers revolves around the concerns related to the costs of flying, which range from the ...

### Atitudes em Relação aos Alimentos Orgânicos - Brazil

"A categoria de orgânicos parece ser favorecida por muitos aspectos percebidos pelo consumidor: é saudável, é mais saborosa, é sustentável e é transparente, honesta. Com tantas qualidades associadas aos alimentos e bebidas orgânicos, as oportunidades para se explorar mais esses tipos de produtos no Brasil são vastas."

– Naira ...

### Attitudes towards Lunch Out-of-home - UK

"While the majority of UK adults still buy lunch out of home, an increase in non-users suggests a cautious mind-set as real incomes come under pressure. Restaurants innovate in ordering management technology to rival their grab-and-go competitors for the custom of increasingly time-poor consumers. C-store formats and supermarkets that utilise ...

### Bacon and Lunch Meat - US

"Over the past five years, bacon and lunch meat managed growth, and it should match that performance through 2021. However, when accounting for inflation,

### Aerospace Industry - UK

"The vote to leave the EU could weaken the UK's standing in the industry over time, with some industry executives admitting that it will force them to work harder to win new business. However, it must be remembered that 'Brexit' also has the potential to open up new markets not ...

### Asians' Attitudes toward Advertising - US

"By 2021, the Census Bureau estimates that there will be 20.3 million Asians living in the US, or 6% of the US population. This group's influence far outweighs its size however, making it critical for advertisers of all types to develop strategies for reaching Asian consumers. On average, Asians ...

### Attitudes toward Charities and Non-profits - US

"Giving to charities and non-profit organizations reached a historic high in 2015. Individuals account for the largest portion of donors, followed by foundation. Financial support is estimated to grow slightly from 2015-16, though declines in volunteerism may prompt organizations to promote the importance of giving back to organizations in a ...

### Attitudes towards Retail Home Delivery and Collection Services - UK

"With online volumes continuing to rise, order fulfilment, be it delivery or collection, is becoming an increasingly important aspect of a retailer's offering and one that consumers will increasingly base purchasing decisions on. It is not necessarily about the speed of a service, it is about offering the customer options ...

### Beauty Devices - US

"Beauty device sales remain flat due to a struggling hair appliance segment reflecting long purchase cycles, price-driven consumers, and women delaying purchases until

sales are largely stagnant, as health concerns appear to be prompting consumers to avoid much of the category. An influx of lower-sodium and more-flavorful options across ...

## Bedrooms and Bedroom Furniture - UK

"Innovation is very important for manufacturers of bedroom furniture, beds and mattresses and this is helping to encourage shoppers to spend a little more. New methods of construction, technical foams and innovative fabrics are promising more hygienic beds, temperature regulation at night and mattresses that stay comfortable for longer. Bed ...

## Bread and Baked Goods - UK

"There is scope for retailers to bring bread and baked goods from local bakeries into stores through collaborations. This can help the grocery giants to show a community spirit, as well as improving their retail offering with genuinely artisan products. This can be teamed with a backstory about the bakers' ...

## Casual Dining - US

"Consumers are increasingly seeking the opportunity to customize their meals, through build-your-own meal options, but they also crave dishes that can't be replicated at home. When it comes to technology, diners are more interested in having their basic needs met, such as free WiFi and electronic chargers, before restaurants offer ...

## Cheese - UK

"The cheese market is expected to see a value decline in 2016, largely due to heavy retail discounting. Continued decline in the dominant cheddar segment has been responsible for the overall fall in cheese volume sales, while bolstered recipe cheese performance suggests consumers' interest in scratch cooking continues. Pressure from ...

## Chocolate Confectionery - Ireland

"Concerns over sugar are putting pressure on sales as Irish consumers limit their consumption of chocolate and buy healthier snacks compared to a year ago,

their existing item is broken or worn out. Skincare device sales have helped to buoy the overall market, benefiting from the relative newness of the category. Increasing ...

## Black Consumers - Feeding Their Kids - US

"Black parents, especially moms, are the primary decision makers and influencers when it comes to feeding their kids. Food is love and while she is in control when raising her kids, she is soft at heart and likes to give in to what her children want to eat...within reason. Her ...

## Car Purchasing Process - China

"A budget car, within the price range of RMB 100,000 – 150,000, which has large inner space, with satisfactory high-tech features, will pretty much be a successful model in China. But there is more to it. Car buyers in different life stages and with different purchase schedules vary ...

## Changing Channel Preferences in Retail Banking - UK

"Consumers have made an irreversible switch from traditional banking channels to digital banking. People not only use online banking more than branches, but see it as the preferential choice for everyday banking and are more satisfied with it than any other channel. The challenge for banks is how to prevent ...

## Cheese - US

"Despite a slight downtick in dollar sales in 2016, the cheese category has performed well in recent years, boosted by consumer interest in natural foods, increased snacking occasions, and the perception that natural cheese can be part of a healthy diet. Natural cheese continues to set the pace for the ...

## Clothing Retailing - Europe

This report series covers the 19 leading economies of Western Europe. In total these countries account for

indicating that consumers are switching to healthier alternatives. Placing a greater emphasis on smaller-portion formats can help brands position chocolate as a treat that can ...

## Clothing Retailing - France

The focus of this report is clothing specialists, because these are the dominant players in the sector. In this report we provide total consumer spending data for clothing, which includes expenditure through all channels. And we include Mintel's Channels of Distribution estimates for France, which indicate how this spending ...

## Clothing Retailing - Ireland

“Value retailers such as Penneys/Primark continue to perform exceptionally well as they have done in the last five years, however, looking ahead the growing online market threatens to pull consumers out of the store and towards online shopping. Value retailers risk being left behind in the absence of an ...

## Clothing Retailing - Spain

The focus of this report is clothing specialists, because these are the dominant players in the sector. In this report we provide total consumer spending data for clothing, which includes expenditure through all channels. And we include Mintel's Channels of Distribution estimates for Spain, which indicate how this spending ...

## Consumer Attitudes to Organic Food - Brazil

“The category of organic food/drinks enjoys a positive perception by consumers, who tend to think organic products are healthy, tastier, sustainable and transparent. The many positive qualities associated with organic food/drinks create vast opportunities for companies to develop the category even further in Brazil.”

– Naira Sato ...

## Cruises - UK

around 95% of all European retail sales, excluding Russia.

## Clothing Retailing - Germany

The focus of this report is clothing specialists, because these are the dominant players in the sector. In this report we provide total consumer spending data for clothing, which includes expenditure through all channels. And we include Mintel's Channels of Distribution estimates for Germany, which indicate how this spending ...

## Clothing Retailing - Italy

The focus of this report is clothing specialists, because these are the dominant players in the sector. In this report we provide total consumer spending data for clothing, which includes expenditure through all channels. And we include Mintel's Channels of Distribution estimates for Italy, which indicate how this spending ...

## Clothing Retailing - UK

“In an increasingly challenging clothing market, clothing retailers need to rapidly adapt to the changing needs of consumers and encourage them to spend by offering them frequently updated collections that are less tied to the seasons, which they can buy and wear immediately.”

## Consumer Attitudes towards Challenger Brands - UK

“Consumer expectations of financial services providers are growing, giving challengers an opportunity to meet people's needs where the more traditional providers cannot. However, increasing awareness levels and highlighting their differences will be key to consumer consideration of challengers. Beyond this, they will also need to prove they can get the ...

## Current Accounts - Ireland

“Increased capacity meant the cruise market enjoyed excellent growth in 2015. Capacity will expand even further over the next few years meaning travel brands have a great opportunity to target affluent ABs and older consumers who make up the bulk of cruisers.”

– Fergal McGivney, Travel Analyst

## Customer Retention and Cross-sell in Banking - Canada

“There is a degree of under-utilization of rewards for multiple product ownership which presents an opportunity for banks to offer more targeted rewards based on customer preferences.”

– Sanjay Sharma, Senior Financial Services Analyst

## Digital Trends Autumn - UK

“Parents are not necessarily the first consumer group that comes to mind when thinking about targets for new technology, but they actually emerge throughout our consumer research as key targets for a number of sectors, both in terms of intention to purchase or upgrade products and interest in the latest ...

## Educational Lending - US

"As the student loan situation worsens, more people are questioning whether their college education was worth the money they borrowed to get it. This is beginning to goad aspiring students into exploring other ways to get their degree, such as going part-time or attending a less expensive two-year school before ...

## Exercise Trends - US

"Fitness facilities and gym memberships have increased in tandem in the last decade, showing that Americans have an increased interest in getting fit. However, even though more are reportedly exercising regularly, obesity rates continue to climb, indicating that adults haven't been able to offset poor diets with exercise alone."

- Dana ...

## Fast Food - China

“The conclusion at first glance is that the Irish current account market emerged relatively unscathed from the financial crisis and subsequent recession – current account ownership is almost universal among both NI and RoI consumers. However, despite the return of economic growth, the number of active current accounts in RoI ...

## Cycling in the Americas - Americas

“Cities need to take the bicycle seriously as transport and make it an equal partner. Well-designed infrastructure introduces a hierarchy and improves behaviour – cars go in car lanes, bikes go on bike paths or lanes and pedestrians use sidewalks.”

– Mikael Colville-Anderson, Copenhagenize Design Company

## Domestic Tourism - UK

“A resurgence of overseas travel continues to be the main threat but a weak Pound, economic uncertainty over Brexit and concerns over safety in some destinations abroad are all likely to help the domestic market in the coming months.”

– John Worthington, Senior Analyst

## European Retail Briefing - Europe

**This review looks at:**

## Facilities Management - UK

"Facilities management has grown as a result of the seemingly relentless drive by companies to outsource non-core activities. The trend has been so strong that it has sustained the industry in both strong and weak economic conditions. However, severe price pressure has arisen, initiated in the recession and boosted by ...

## Free Leisure - UK

“For fast food brands, embracing the trend of healthy and experiential dining is the key to growth in the near future. In the meantime, getting more innovative can help to win over young consumers.”

## Gluten-free Foods - US

"Consumption and sales of gluten-free foods continues to increase, but growth in sales has slowed considerably in recent years. Sales do continue to grow, just at a slower pace. The propagation of lower-priced gluten-free foods, including store-brands, as well as other more competitively priced options are likely responsible for the ...

## Hispanics - Feeding Their Kids - US

"When feeding their kids, Hispanic parents want to feel in control. However, that is not always possible as the foods they feel comfortable serving their kids are not the same their kids like and Hispanic parents need to make compromises. The discrepancies in expectations can create some tension when kids ...

## Internet Radio - US

"The use of internet-based music services is closing in on traditional means of listening to music, including terrestrial radio and personal libraries. The finding, alongside clear distinctions in how younger listeners use streaming services suggests that over the next decade streaming services will become the dominant means of listening to ...

## Juice and Juice Drinks - US

“Like other non-alcoholic beverage leaders, including CSDs and dairy milk, the category is losing share to other beverage types that offer flavor variety and functional innovation, some with lower sugar/calorie totals. The importance of diversifying consumption occasions can be seen in the growth of snack-friendly smoothies and decline of ...

## Living Online - China

“A long period of economic downturn, slow wage recovery and ongoing uncertainty over recent years has triggered a shift in attitudes towards leisure spending. While many consumers have reduced their out-of-home leisure spending in favour of cheaper forms of home entertainment, free out-of-home leisure has also become a deliberate money-saving ...

## Healthy Lifestyles - UK

“A third of adults believe that they are healthier now than they were a year ago, reflecting the UK’s booming interest in healthy living. However, healthy habits are hard to adopt, and even harder to sustain. The perceived higher cost of healthy food is also a significant barrier. Brands and ...

## Hotels in Turkey - Turkey

“It seems unlikely that the situation in which the Turkish hotel sector finds itself at the end of the 2016 summer season could get any worse. Indeed, now there is reason to be more optimistic for the coming years. The really good news is that mass Russian tourism will soon ...

## Juice - China

“In the shrinking juice market, packaged juice is not only facing competition from on-trade fresh juice but is also pressured by the decrease of juice drinks – the dominant segment in the category, which leaves limited scope for key players to convert non-users to drive sales, but poses an opportunity ...

## Laundry Detergents - UK

“Brand loyalty is powerful in the laundry detergents category, contributing to the popularity of sales promotions and subscription services and undermining value sales. Interest in innovations that add convenience or a touch of the expert to products is strong, and could be used to invigorate interest and increase spend. The ...

## Logistical Services - UK

“Smart home device market is yet to be developed in China as the penetration of most smart home devices is still quite low. Apart from heavy subsidy, online service platforms/providers need to find other ways to enhance and improve their consumer loyalty. When launching online advertisements, companies and brands ...

## Luxury Cars - US

The luxury car market is an extremely competitive market and ranges from 5-10% of the overall new car market. Luxury vehicles are typically more expensive and equipped with the latest features and technology and appeal to consumers who want the latest and greatest for their vehicle. Finding opportunities in the ...

## Meat - Canada

"Canadians remain avid consumers of meat products, yet this does not mean the industry is without its challenges. Canada's changing population dynamic from a generational and immigration perspective means producers and retailers will need to continually adapt in order to address evolving preferences with respect to flavours and type (of ...

## Mobile Apps - US

"Mobile app use is ever-present, with most consumers using apps daily or often several times day. Apps allow brands from all industries to provide consumers with tools to make their lives more convenient or simply as a way to stay informed and entertained. Advertisers have a challenge influencing mobile app ...

## Mobile Device Apps - UK

“The initial spike in downloads is now being followed by a phase in which consumers are focusing on fewer apps but rely on these more heavily, fostering both usage and monetisation. The introduction of chatbots will further facilitate this re-bundling of different services and information in a single multifunctional location ...

## Private Medical Insurance - UK

“The decision to leave the EU will not only affect the UK, but also global supply chain models. The referendum result will be a test of the agility and resilience of global supply chain models amid a period of significant change and uncertainty for the EU.”

– Lewis Cone ...

## Marketing to Students - China

“Today's Chinese university students are more independent financially and mentally. They make sensible and value-driven purchases and like brands that speak their minds. Showing off is not a primary pursuit. They intend to live free from societal pressure and competition. To achieve greater autonomy, they look for ways to develop ...

## Men's Personal Care - US

The men's personal care market is expected to reach \$4.4 billion in 2016, representing growth of 15% when looking at the period from 2011-16. However, sales growth has slowed in recent years as the category stabilized and has been impacted by competition from a growing number of male-specific and ...

## Mobile Device Apps - China

“Apps should be adapted to more devices besides smartphones and tablets. For in-app advertisements, native advertising that fits both the device and consumers' habits when using apps can enhance efficiency. Consumers do look for various functions on apps, and integrating mobile apps allow consumers to have easy access to niche ...

## Pest Control and Repellents - US

“People are spending more on pest control than ever before. Although most spending is on pest control services, product sales for outdoor repellents are also rising. Warmer weather and concerns about mosquito-borne illnesses contribute to overall category spending; however, concerns about the safety of pest control products still linger, leading ...

## Renewable Energy - UK

“Providers must continue their efforts in regards to cost containment and product innovation, incorporating new digital technology to develop attractive propositions that meet the changing needs of consumers and to ensure the market’s future sustainability.”

## Sandwiches, Subs and Wraps - US

“The state of the LSR (limited service restaurant) sandwich market reflects major trends in the LSR industry as a whole. QSR (quick service restaurant) giants such as Subway command the greatest share of sales but are slowly losing business to rapidly growing fast casual concepts. As consumers turn to more ...

## Shaving and Hair Removal - UK

“Driven by a spike in NPD, a rise in advertising spend and changes in hair removal trends, the shaving and hair removal category returned to growth in value in 2015 following years of decline. Consumers are showing evidence of shaving more (both at a higher frequency and a greater area ...

## Spectator Sports - UK

“Television sports coverage is making an instant expert of the armchair fan – but leaving stadium operators needing to do more to keep spectators in the same loop.”

– **David Walmsley, Senior Leisure Analyst**

## TV Viewing Habits - UK

“Binge watching is increasingly becoming the preferred method for watching TV series, particularly among younger viewers. However, for select TV series having a stalled release structure can still bring major gains in terms of boosting profile, anticipation and engagement as social media becomes the new ‘water cooler’.”

– **Rebecca ...**

## Unprocessed Poultry and Red Meat - UK

“The recent rapid expansion of the renewables sector is set to slow in percentage terms following a series of policy changes, including subsidy cuts, and the transition from the Renewable Obligation (RO) support scheme to the less generous Contracts for Difference (CfD) mechanism. More established technologies, such as solar PV ...

## Seasonal Shopping (Spring/Summer) - UK

“Whilst retail spending during the Spring/Summer months is typically lower than that of autumn and winter, there are some important events in the calendar that retailers can use to encourage consumer spending. Easter continues to be the largest event, worth an estimated £550 million in 2016. However, the date ...

## Small Business Banking - UK

“Small business owners show a reasonable level of interest in value-added services such as access to accountancy software but few are prepared to pay extra for these benefits. However, as efforts to drive up competition in the market intensify, we can expect to see more diversified offerings emerge that will ...

## Still, Sparkling and Fortified Wine - UK

“Seen to offer value for money by just one in four UK adults, still wine could come under fire if household incomes are squeezed following the UK’s vote to exit the EU. Indeed, the drop in the strength of the Pound and the UK’s reliance on imported wine are set ...

## UK Retail Briefing - UK

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

## Video Games and Consoles - UK

“With cost rises looming on the horizon, there is a pressing need for retailers to move their communication beyond price. Highlighting their credentials in terms of farmer relations or responsible antibiotic use offers a promising means for companies to distinguish their offering from rivals’ given the strong consumer interest.”

...

## Vitamins, Minerals and Supplements - US

“VMS (vitamins, minerals, and supplements) is a trend-driven industry hinging on the latest health fad such as today’s emphasis on digestive health and supplements containing beauty benefits. While its growth has been steady, certain players are faring better than others by meeting consumers’ needs for convenience and fun, in addition ...

## 在线生活 - China

“中国智能家居设备的渗透率依然很低，该市场还有待发展。除了丰厚的优惠，在线服务的平台/供应商需要找到其他的方法提高消费者的忠诚度。投放在线广告时，商家和品牌可以将口碑营销的策略放在首位，以吸引中国消费者。”

## 果汁 - China

“在不断萎缩的果汁市场上，包装果汁步履维艰，既要面对来自餐饮渠道鲜榨果汁的竞争，也难逃果汁饮料（包装果汁中的主导品类）市场下滑的厄运，这就使得重点企业试图通过转变非用户来推动销售的空间变得非常有限，但也为健康类包装纯果汁和功能果汁提供了发展机会。中国果汁厂商面临的挑战是如何继续保持积极的关联性和为品类增添附加价值，以赢得消费者的信任，从而增加消费和提高趋优购买的信心。不加糖和全天然的产品可以提高果汁的健康形象和打消消费者的安全顾虑。”

— 李蕾，研究分析师

## 移动设备APPs - China

“除了智能手机和平板电脑外，应用程序还应适配其它更多的设备。对于应用程序中的广告，契合设备和消费者应用程序使用习惯的原生广告有助于提升品牌宣传效果。消费者希望在应用程序上获取各种功能。集成移动应用方便消费者使用小众应用程序和服务。”

“Continued migration to current-generation consoles is keeping the value of the UK video games market buoyant by pushing the average value of video game software sales up. With new hardware launches in the near future likely to grow the potential market for video game software, the prospects for the market ...

## White Spirits - US

“The white spirits category is poised for continued modest growth sustained by vodka and propelled by growing interest in the complexities of tequila. Opportunity to grow the category can be leveraged by cross category consumption.”

## 快餐 - China

“拥抱健康饮食、体验式餐饮的潮流，是不久的将来快餐品牌发展之关键。与此同时，加强创新可以让品牌赢得年轻消费者的心。”

— 陈杨之，研究分析师

## 汽车购买过程 - China

“一辆售价10-15万元左右，有充足的内部空间，配备令人满意高科技功能的经济型汽车基本是能在中国汽车市场成功的车型。但现实还远不止如此简单。处在不同人生阶段、购车时间不同的消费者有着不同的偏好。对于制造商和营销人员而言，突破点在于强调驾驶辅助技术。”

## 针对大学生的营销 - China

“今天的中国大学生在经济和思想上都更独立。他们理性思考，购买性价比高的产品，而且喜欢那些了解他们心声的品牌。炫富并不是他们首要的追求。他们希望自由生活，免受社会压力和竞争的影响。为了获得更多的自主性，他们致力于发展特殊技能，在经济和精神上自我提高。”