Understand Consumer Trends in the U.S. Watch and Diamond Market

Did you know more than half of Americans did not wear a watch in 2016? And that oval diamonds were the year's fastest-growing shape sold in the 1-carat range? To grow your business in this competitive market, it's critical to understand consumer trends in the watch and diamond industries. **Here's a look at our latest insights:**

Our consumer watch data revealed that in 2016 . . .

53% of Americans **did not wear a watch**

22% of annual **watch sales were made in the month of December**

Apple owns 49% of smart watch market share, with **Samsung right behind at 23%**

Sales of rubber and plastic watch straps increased 62% over 2015

Men's watches in the $3,000-$5,000 range showed a steep decline at 18% compared to 2015 sales

Source: The NPD Group/Consumer Tracking Service



Start seeing what others cannot. Go to the source that provides in-dept industry insights – The NPD Group can help you grow your business and get a winning advantage.

And in diamonds . . .

Oval was the fastest-growing shape sold in the 1.00 CT size range (41%)

Princess shapes declined 16% in sales in the 1.00 CT size range

Average retail margins on all diamonds was 37%

The **average retail price per carat** of 1.00 CT loose diamonds was $5,225

The **average wholesale cost per carat** of 1.00 CT loose diamonds was $3,236

Source: The NPD Group/Diamond Tracking Service

Learn more. Contact Desiree Hanson at 203.421.2204 or e-mail desiree.hanson@npd.com.

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The Delivery Market Down Under

To make smarter business decisions, you need to know not only the foods Australians are eating and why, but also how and where they eat those foods. One trend worth watching is the rise of delivery in Australia. **Here's a look at our latest insights . . .**

Foodservice delivery growth

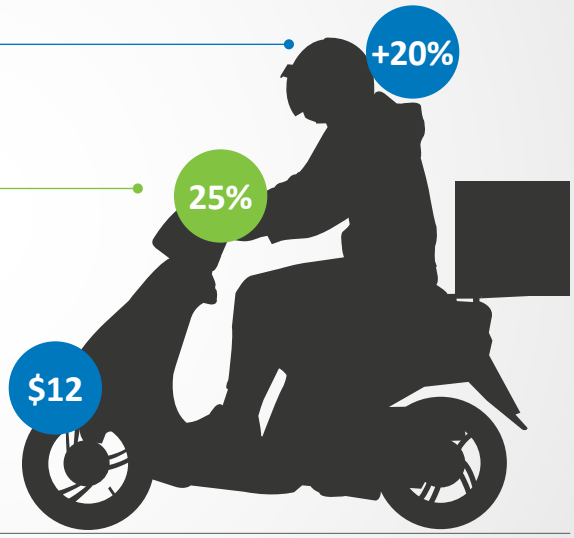
Growing at a faster rate than any other service mode, delivery sales are up by more than +20% since last year!

Share of growth

Representing just 4% of total foodservice sales, delivery accounted for a quarter of incremental **industry gains in the first six months of this year.**

High price point

Delivery consumers have the 2nd highest spend per head of any ordering method, with cheque only marginally lower for in-restaurant ordering.



Millennials

Whilst they are pulling out of the broader foodservice market, **Millennials account for half of all delivery occasions and two-thirds of gains.**



Aggregators

Up +6 points since last year and still growing, **aggregators now capture 39% of all delivery orders.**



Deals

50% of all delivery occasions include some form of deal, in contrast, less than a third of non-delivery occasions include a deal.



Understanding foodservice trends is critical to your success. At The NPD Group, we provide continuous and rigorous tracking of more than 60,000 consumer visits to commercial foodservice establishments in Australia. Get a winning advantage.

Source: The NPD Group/CREST®, YTD June 2017, Total Foodservice

Get more insights like this. Contact your NPD account representative, call +61 2 8257 6426, or email thomas.kelly@npd.com.

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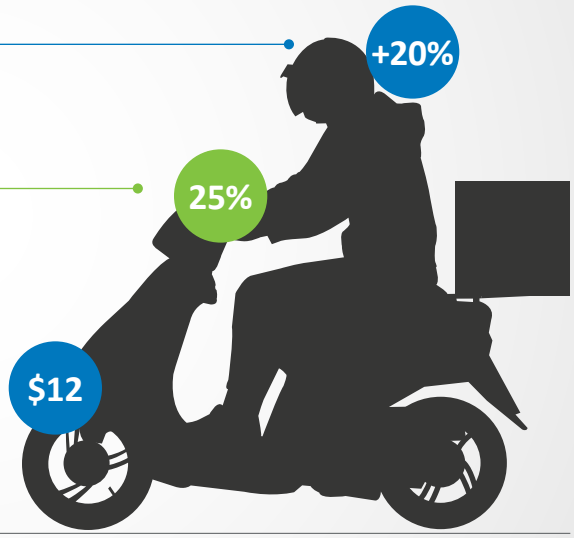
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Tracking Food Attributes in Australia

To make confident business decisions, it's important to know not only what and where your customers eat, but also why they choose the menu items they order. Whether it's "high protein" or "cruelty-free", "vegetarian" or "no added content", more than a third of consumers dining out in Australia have specific product characteristics in mind when they order their food. **See what we see . . .**

Top Food Attributes Australians Seek

- **#1 Provenance** (place of origin)
- **#2 No Added Content** (no added hormones, preservatives, etc.)
- **#3 Low Content** (low calorie, fat, carb, sugar, sodium, etc.)
- **#4 High Protein**
- **#5 Cruelty-Free**
- **#6 Vegetarian/ Vegan**
- **#7 Gluten-Free**
- **#8 Other**



Consumers want to know more about what they're eating

Provenance (18%) is the most important attribute to Australians, followed by no added content (13%) and low content (12%).



Key attributes vary with age

Millennials are more concerned about clean eating and cruelty-free menu items. Consumers aged 50 and older care more about provenance.



Preferred channels differ too

Fast casual consumers care more about low content, no added content, and cruelty free, than traditional QSR consumers.

As the global foodservice industry's source for data and insights that deliver a winning advantage, NPD's CREST® service provides continuous and rigorous tracking of more than 60,000 consumer visits to commercial foodservice establishments in Australia. Start making data-driven decisions with confidence!

Source: The NPD Group / CREST®, traffic share YE December 2016

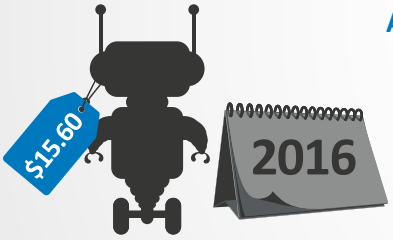
Learn more. Contact The NPD Group at +61 2 8257 6426
or thomas.kelly@npd.com

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Finding Success in Australia's Toy Market

Success in the softening Australian toys market requires a complete understanding of the retail landscape. That calls for point-of-sale information for all channels and geographical regions, as well as insight on consumers' awareness of toys, their spending habits, and their purchase behavior. **See what we see . . .**

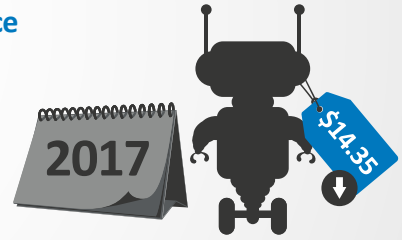
Falling prices and rising unit sales are not driving revenue growth.



Average Price $15.60
Unit Sales 17.8
Revenue $277M

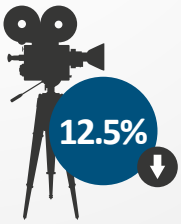
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Average Price $14.35
Unit Sales 19.0
Revenue $273M





Toys priced between $10 and $50 dollars are leading the decline, even though sales are growing in higher and lower price tiers.

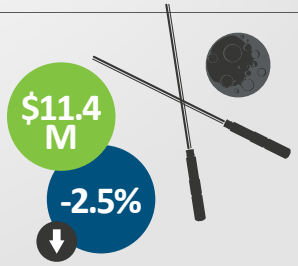


Movie-driven properties fell 12.5% in the first 5 months of the year, for a loss of $53M, but our analysts expect the industry will recoup those losses in the second half of the year.

7 of the top 10 toy properties are driving growth. **Batman-related toys gained 2.7 share points** in the January-to-May period, **thanks to performance in the building sets category.**



Star Wars toys claimed both the greatest value sales ($11.4M) **and the greatest drag on performance** (-2.5%) for the period.



Get a winning advantage. OzToys delivers the only point-of-sale and online consumer panel survey data on toys in Australia, helping industry leaders better understand and sell in this complex market. Discover why leading brands around the world rely on NPD to help them make data-driven decisions with confidence.

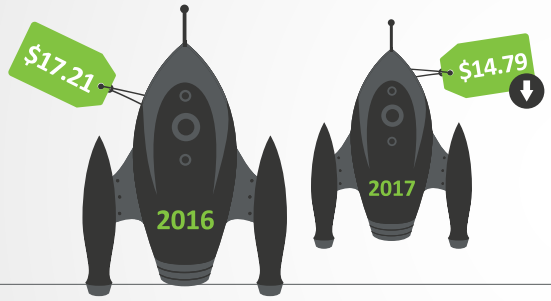
Source: The NPD Group, OzToys (point-of-sale data), YTD May 2017

Learn more. Contact russell.carter@npd.com or miguel.velasquez@npd.com.

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Australia: The State of Play

To achieve — and sustain — success in the Australian toy market, you need the most up-to-date sales data and deep industry analysis. It's how to separate fads from trends, uncover emerging needs and opportunities, and react quickly to consumer buying behaviors and motivations. **See what we see . . .**

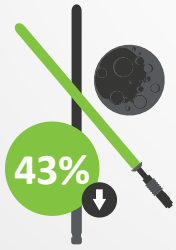


Average prices slide even as unit sales rise

ASP reached **$17.21 last year,** but **fell to $14.79 this year.**

Best-selling properties

Star Wars maintained its lead, despite a 43% year-over-year decline.



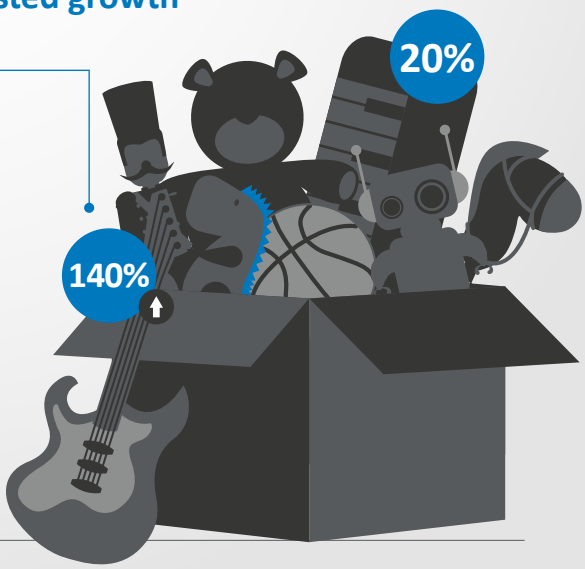


Shopkins also started to lose steam, declining 21%.

Just 8 out of the top 20 toy distributors posted growth

Just Play Products represented by The Brand Exchange **grew by triple digits (140%).**

Others on the rise included Hasbro (2%), Headstart (13%), Spinmaster (26%), Funtastic (6%), Banter Toys (15%), Crown & Andrews (5%), and Zuru (<1%).



Discover why leading brands around the world rely on NPD to get a winning advantage. OzToys delivers the only point-of-sale and online consumer panel survey data on toys in Australia, giving clients the ability to better understand and sell in this complex market. It reports on value and unit sales and market share, pricing and distribution measures, consumer demographics, purchase drivers, and more.

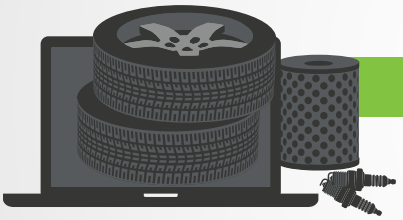
Source: The NPD Group/ Retail Tracking Service, YTD July 2017

Get the right products in the right places for the right people.
Email seton.leung@npd.com or miguel.velasquez@npd.com for more information.

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Who's Buying Auto Parts Online — and Why?

E-commerce is gaining importance in the aftermarket. To stay competitive, you need to know what matters most to online shoppers, so you can speak their language — and outsmart your competitors. **Here's a look at our latest data and insights on auto parts and online shopping.**



The online auto parts shopper . . .

Is married and middle-aged — 44% are **aged 35 to 54.** 35% are **more likely to be male** than non-online auto parts shoppers. They are 56% **more likely to be married** than auto parts shoppers who do not purchase online.



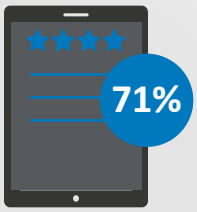
Lives in the suburbs or a rural area, is a **home owner,** and is 27% **more likely than other shoppers to drive a car or motorcycle to work.**





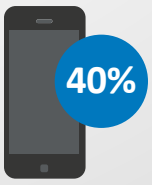
Is 50% more likely to do major auto repairs themselves than non-online auto parts shoppers.

Auto parts shoppers who do not shop online are . . .



71% less likely to seek out online reviews for items they want to purchase, compared to online shoppers.

Twice as likely to never leave a negative review on products they dislike and 1.5 times more likely to leave positive reviews on products they do like.



40% less likely to use their smartphones to research products they want to purchase.

Our new report, **Auto Parts Shoppers: Online and In-Store Behavior and Trends,** can help your business get to know the online automotive parts shopper. Use it to size the market opportunity, create messaging that resonates with online shoppers, and get a clear sense of whom to target. Get a winning advantage!

Source: The NPD Group/ Auto Parts Shoppers: Online and In-Store Behavior and Trends

Learn more. Contact your NPD account representative, call 866-444-1411, or email contactnpd@npd.com.

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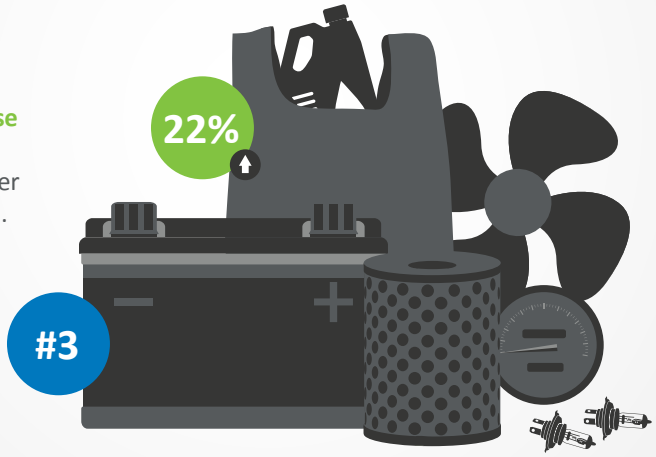
Profiling the DIY Walmart Consumer

Walmart continues to hold a dominant role in the automotive products market, particularly among its frequent shoppers. However, other retailers are emerging as disruptors. We've uncovered what motivates people to select Walmart for automotive aftermarket purchases, as well as the reasons other retailers are selected in some cases.

See what we see . . .

Walmart shopping frequency for automotive products is on the rise vs. 2015. 22% total auto product buyers shop there at least once per month, compared to 17% in 2015.

Automotive is the third most likely department to be shopped at Walmart, by both frequent and infrequent Walmart shoppers.



Competitive pricing and ease of finding what they need are the two top drivers for DIY automotive product purchases from Walmart.com.

Nearly half of Walmart.com DIY auto product buyers **first purchased through the site within the last two months.** 4 in 10 have been purchasing auto products on the site for a year or more.

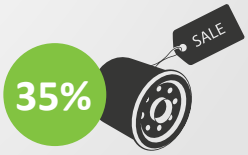




Nearly 2/3 are very **likely to purchase auto products from Walmart.com in the future.**



6 in 10 Walmart consumers said the Walmart they shop has an Auto Care Center in the store, and around **half have taken their vehicle there for service.**



35% of automotive product buyers would be **likely to jump brands if they saw another brand on sale.**

Now you can explore DIY automotive consumers' Walmart shopping behavior, retailer selection criteria and satisfaction, shopping dynamics, and online shopping behaviors. Our new report, ***Profiling the DIY Walmart Consumer***, is based on consumer data. Released every two years, it includes trend data and is designed to help you develop data-driven marketing strategies and meet Walmart customers' needs. Get a winning advantage!

The NPD Group/Walmart Consumer Report 2017

Learn more. Contact your NPD account representative, call us at 866-444-1411, or email contactnpd@npd.com.

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Australia Foodservice
2016 Overview

Thanks to more visits and growth in average eater cheque, consumer spending in the Australian foodservice industry grew by 2% in 2016. Last year saw a number of industry firsts and emerging trends setting the stage for a very different landscape to take shape this year. **Here's a look at some of our latest insights.**



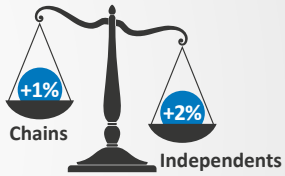
Families

The return of families to the foodservice industry has accelerated. In 2016, it **grew at twice the pace** of the previous year, bringing the volume of **family visits to a three-year high.**



Retail

The retail channel represented just 9% of the foodservice market in 2016, but it **accounted for 18% of the increase in visits.**



Independent Outlets

For the first time, traffic gains at **independent foodservice outlets outpaced** gains at chain restaurants.

Fast Casual

After the initial boom in 2012, the gradual slowdown in fast casual traffic growth **has turned into a decline.**



Delivery and Pick-Up

In 2016, delivery and pick-up occasions reached their highest point since CREST® began tracking in Australia. By far the largest source of growth for these occasions was dinner at full service restaurants, driven by the higher visibility they are receiving from a growing number of food delivery aggregators.



Understanding consumer foodservice trends is critical to your ongoing success. As the foodservice industry's go-to source for essential market information, we provide continual and rigorous tracking of more than 60,000 consumer visits to the Australian foodservice industry every year. We apply superior analytic skills to our proprietary CREST® database so you can identify new business opportunities, avoid threats and make data-driven decisions with confidence.

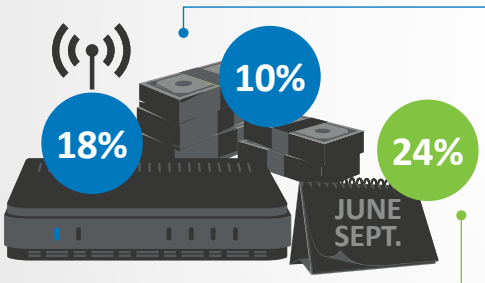
Source: The NPD Group/CREST®, YE Dec 2016.

To learn more, contact thomas.kelly@npd.com.

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As Network Demands Rise, Access Point Market Soars

Channel partners are always looking for technology solutions that are easier to deploy and manage — and those they can augment with higher-margin IT services. To solve for increasing demand and benefit from advances in technology and streamlined performance, smart companies are purchasing and upgrading access point hardware. **See what we see . . .**



24% of access point unit sales occurred in June and September — the peak of the education and federal government buying seasons.

Access point unit sales in the U.S. grew 18% and revenue climbed 10% compared to the same period year ago.

Top Selling Access Point Brands in the B2B Indirect Channel

Ranked by Percent of U.S. Unit Share

1. Cisco Systems
2. HPE-Aruba Networks
3. Ubiquiti Networks
4. Ruckus Wireless
5. Aerochive Networks



Rapid adoption of Chromebooks for education led to a 42% compound annual growth rate (CAGR) for Chromebook unit shipments in the B2B indirect channel, from 2014 to 2016.

> "Channel partners increasingly seek technology solutions that are easier to deploy, manage, and layer higher margin IT services on top of. Among other factors, we expect that continued adoption of 802.11ac Wave 2 devices, which offer greater throughput, will drive sales growth as companies look to solve for network demands from an ever-increasing number of devices that are connected, stream content, and also generate valuable telemetry data to be analyzed for big-data strategies."

Michael Diamond
Director, Industry Analysis — Commercial Technology, The NPD Group

Get more insights like this. ***Distributor Track***® and our ***Commercial Reseller Tracking Service*** provide the data and insight technology industry leaders need in order to make confident business decisions. As the tech industry's authoritative resource for tracking and sales-out data in the total commercial channel, we can help you get the right products in the right places, at the right prices, for the right people.

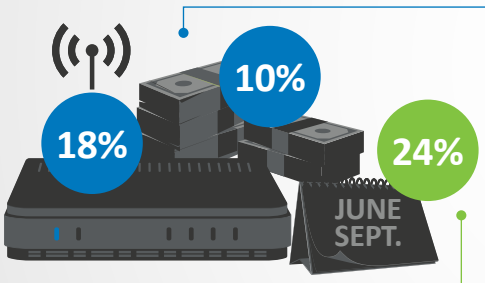
Source: The NPD Group/ Distributor Track® and Commercial Reseller Tracking Service, Jan. – Oct. 2017

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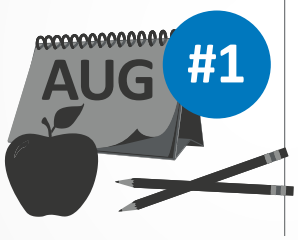
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2017 Back-To-School Purchase Intentions

This year's back-to-school shopping season will be longer, and could be larger, than last year's season. The majority of U.S. consumers plan to spend about the same as last year — or more — on most categories on their shopping for the 2017-18 school year. **Here's a look at our latest back-to-school insights.**

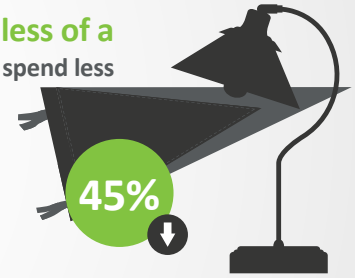
August is the hottest back-to-school shopping month.

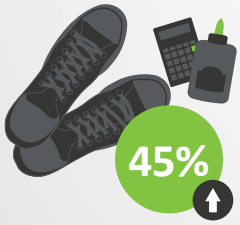
In 2016, **more than 30% of consumers started their back-to-school shopping** in August, and **33% completed it in August** — the largest share of the season for both.



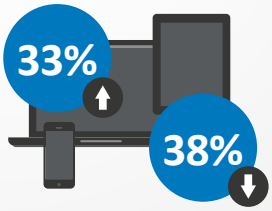
Back-to-college is less of a priority.

45% plan to spend less than they did last year on college-focused categories like bedding, kitchen items, and small electronics.





Shoppers plan to spend more on top categories. More than 45% plan to increase their spending on fashion and school supplies in the 2017-18 school year.



Spending plans for electronics are divided: 33% of consumers plan to spend more, and 38% plan to spend less than they did last year.



Top Back-To-School Categories Purchased

K-12

Fashion
(Apparel, Footwear, Accessories)
School Supplies
School Accessories
Art Supplies
Electronics

College

School Supplies
Fashion
(Apparel, Footwear, Accessories)
Bedding, Bath & Storage
Personal Care & Grooming
Electronics



Get a jump on what's next with the latest back-to-school data and insights.
The new ***Back-To-School Report*** gives you a comprehensive look at back-to-school shopping, consumer insights, marketplace observations, and industry expert outlooks.

Source: The NPD Group/LAB Series: 2017 Back-To-School Report

Interested in more back-to-school insights? Contact your NPD account representative, call us at 866-444-1411, or email contactnpd@npd.com.

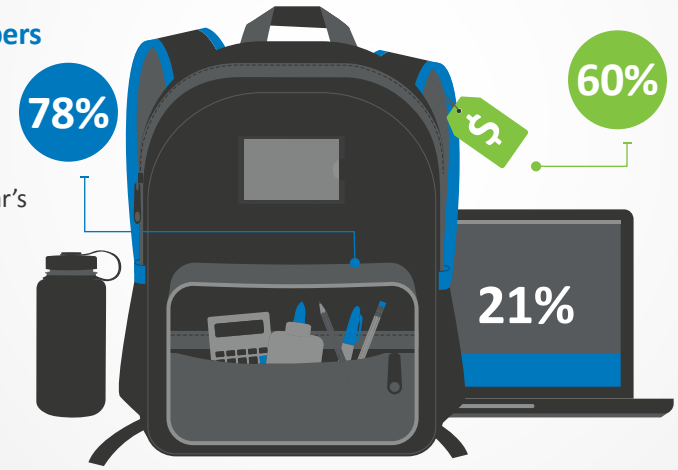
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Back-to-School Shopping: Looking Back to See Ahead

The back-to-school season is the second largest retail shopping season. To gauge what's to come this year, we looked back on last year's back-to-school shopping behavior. **See what we see.**

Back-to-school shoppers are still shopping primarily at brick-and-mortar.

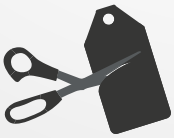
More than 70% of last year's back-to-school purchases were made in stores. In-store purchases were lowest for sports equipment, at 61%, and **highest for school supplies, at 78%.**



Consumers want it all — good value at a good price.

Almost 60% of consumers said they only buy back-to-school items on sale/discount. Quality and durability are also important.

The back-to-school shopper is practical and price-conscious.



When deciding where to shop, the top considerations included:

- **The best/lowest prices**
- **Sales/discounts/promotions**
- **Wide product selection**

Free shipping is important.



Across all back-to-school categories, **21% of purchases were made online.** Consumers said free shipping is one of the most important benefits of online shopping.

The new **Back-To-School Report** is *the* source for data and insights on all things back-to-school. For the first time, get a comprehensive look at back-to-school, including consumer insights, marketplace observations, and industry expert outlooks.

Source: The NPD Group, Inc. / LAB Series: 2017 Back-to-School Report

Learn more about our back-to-school insights. Contact your NPD account representative, call us at 866-444-1411, or email contactnpd@npd.com.

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Swimwear Is Heating Up

Available real estate is declining. Retailers are working through brand rationalization. Private label is becoming more important in this category. E-commerce is providing a conduit for new and innovative brands to incubate. How will you beat the competition? With deep data and expert insights. **Here's a peek.**

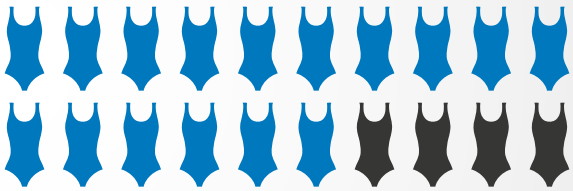
Retail Overview

53% of total swimwear dollars **belong to the top 10 retailers**.*

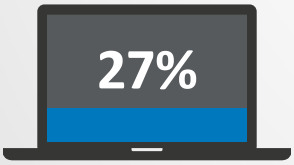


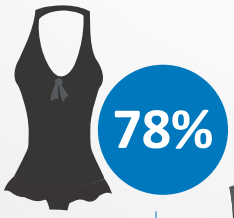
Private Label Takes Over

16 of the top 20 swimwear brands **have exclusive distribution**.*



Includes apparel vertical specialty stores





Online vs. In-Store

27% of swimwear is **purchased online** compared to 20% for total apparel.*

78% of online swimwear buyers are loyal to one retailer.***



Women's Silhouette Performance: Cruise '18

20% dollar volume **growth from one pieces** as other silhouettes decline.**

Swim is booming, thanks to trends in travel and innovation, but the industry is also in the midst of significant change. Curious about what's ahead for swimwear in 2019? Just ask us. We can help you see what others cannot — the current realities and future possibilities for your industry, your customers, your business.

*The NPD Group/Consumer Tracking Service *12ME July '17, Total Swim, **3ME April'18 Women's Swim, ***The NPD Group/Checkout, 12ME July'17, Total Swim*

Learn more. Contact Michelle Criss at michelle.criss@npd.com or Chelsea Suffoletto at chelsea.suffoletto@npd.com.

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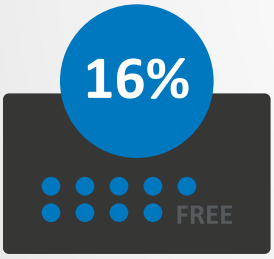
A Question of Loyalty

Foodservice loyalty programs give operators a way to engage with and learn about their customers — and keep them coming back. However, even though consumers' awareness of these types of programs in Australia is high, many are still not signing up. This is a significant missed opportunity to engage with customers and better understand their purchasing behaviour. **Here is a closer look.**

Sign-ups lag awareness

14% of foodservice consumers **have signed up for a restaurant loyalty program.**





16% of foodservice consumers **are aware of loyalty programs, but have not signed up.**

Retail channel leads in loyalty

Supermarkets, petrol/C-stores, and other retail establishments have the highest share of loyalty program visits at 41%.



What do consumers want from loyalty programs?

Ease of earning points



275 POINTS

Point redemption for discount



Birthday rewards/offer



Understanding consumer loyalty and other foodservice trends is critical to your ongoing success. As the foodservice industry's trusted source for data, industry expertise, and prescriptive analytics, we provide continual and rigorous tracking of more than 60,000 consumer visits to the Australian foodservice industry every year.

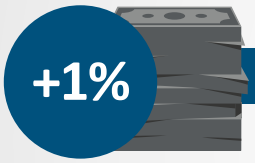
Source: The NPD Group/CREST, Quarter End March 2019

Get more insights like this.
Contact Leo Tan at +61 2 8257 6469 or leo.tan@npd.com.

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Q4 2019 Foodservice Performance in Australia

In the last quarter of 2019, Australia was badly hit by the unprecedented bushfires; they continue to threaten the nation's economy. The weak economic growth at the end of the year was also a result of lowered consumer confidence and demand across retail sectors — foodservice bucked the trend. **Here's a closer look.**



Consumer spending in the foodservice industry grew at 1% in Q4.

Even so, the growth rate trended downward for the 12 months ending December 2019.

QSR saw 2% traffic gains vs. year ago and had its best quarter in the last 3 years. This was mainly due to the increased consumer demand for the top chains across the major QSR categories.

FSR traffic declined 3% compared to Q4 2018.





Morning meal continued to be the bright spot, growing 5% vs. 7% Q4 2018.

PM snack posted the strongest growth at 12% compared to a 2% decline in Q4 2018.

Over the last 16 months, consumers opted to eat out for either lunch or PM snack.

Lunch, the industry's biggest daypart, failed to continue its Q3 growth momentum, reflected in a 5% decline YOY.



As in prior quarters, the motivation to consume a healthy/light meal continued to hold strong in Q4. How will this trend evolve in the year ahead? What will be the impact on Australia's eating habits? **At The NPD Group, we're here to support your data-driven growth.**

Source: The NPD Group/CREST®, quarter ending December 2019

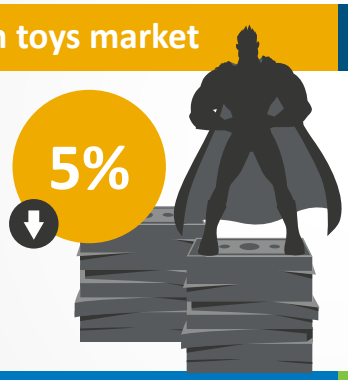
Learn more about foodservice trends in Australia.
Contact Leo Tan at +61 2 8257 6469 or email leo.tan@npd.com
Visit us at www.thenpdgroup.com.au

What's Hot in the Cooling Australian Toys Market?

The overall toy market declined in the first seven months of 2019, though the industry showed some signs of improvement in June and July, thanks to the mid-year toy sale. **Take a closer look.**

Australian toys market

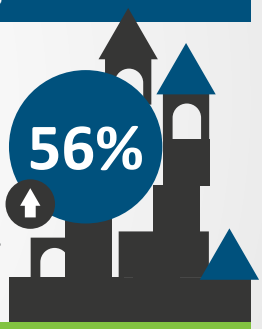
Sales revenue declined 5% YOY, and unit volume fell 8%.



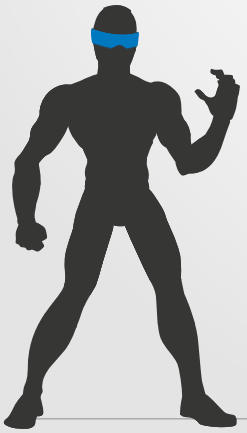
Hot toy categories

Building sets grew 56%.
This category was the largest contributor to toys revenue.

Collectibles fell 1% YOY to reach 11% of the toy market. YOY sales revenue fell 11%.



Top 5 new properties ranked by sales revenue



1. Fortnite
2. Lego Spiderman
3. Poopsie
4. Ryan's World
5. Rainbocorns

Top 5 toy licenses ranked by sales revenue



1. Toy Story
2. Harry Potter/ Fantastic Beasts
3. Lego Harry Potter
4. Lego Movie
5. Fortnite

With a new movie out, the "Toy Story" franchise rose to top position.

You need comprehensive point-of-sale data about toys in Australia — and the know-how to understand and monitor trends. The NPD Group delivers the only point-of-sale and online consumer panel survey data on toys in Australia, supporting your data-driven growth.

Source: The NPD Group/Retail Tracking Service, Australia, January – July 2019 versus 2018

Get more insights like this.
Email amelia.eng@npd.com for more information.

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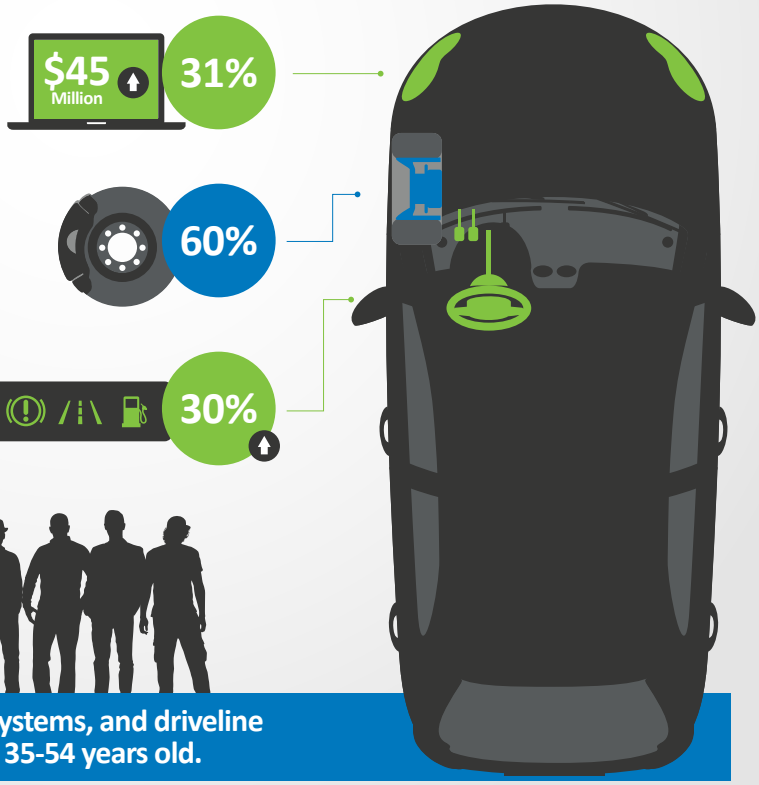
Close-Up: Booming Online Hard Parts Sales

Leading hard parts category sales are experiencing double-digit growth online. The number of accumulated transactions provides great visibility into the hard parts category. Our transaction counts are increasing year over year, which indicates there's a trend toward purchasing these products online. **Here's what our Checkout E-commerce data shows. . .**

Online sales of the top hard parts categories (brakes, application electrical, body parts, suspension, driveline and fuel systems) grew in 2017. Brakes sales dollars increased by $45 million (+31%) versus year-ago.

Brake pads and brake drums and rotors accounted for 60% of dollar share within the brakes category.

Brakes, driveline, and fuel systems all experienced an increase of over 30% in dollar sales from 2016 to 2017.



Over 40% of online brake, fuel systems, and driveline hard parts buyers are aged 35-54 years old.

Analyzing purchase behavior over time is vital to understanding rapidly evolving consumer tastes and trends — such as volume shifts online — that are disrupting retail. ***Checkout E-commerce Tracking*** delivers detailed category views in standard industry hierarchy, with comprehensive feature coding. It measures unit volume and share, dollar volume and share, and average price, across industries and subcategories. Beyond the data, NPD offers industry expertise and insight on how to win in e-commerce.

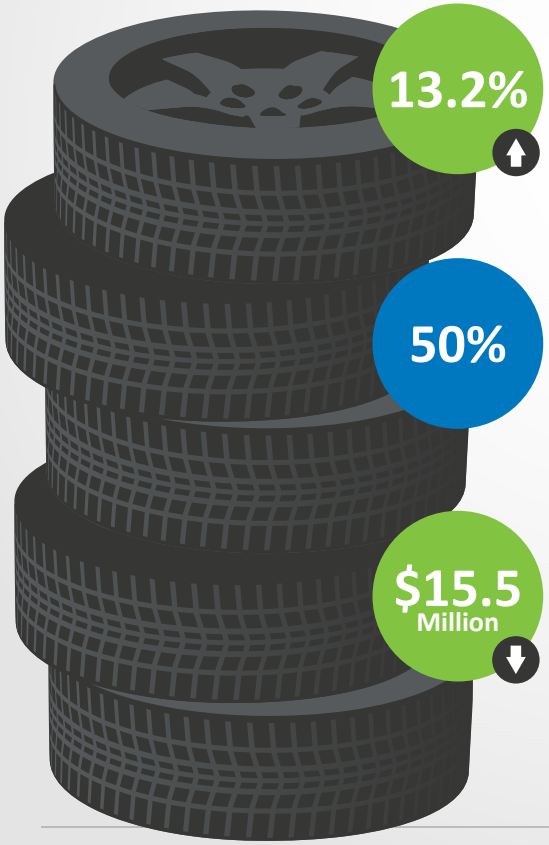
Source: The NPD Group/Checkout E-commerce Tracking

Get more insights like this. Contact Matt Hendrick at (216) 273-7635 or email matthew.hendrick@npd.com.

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Spotlight on Passenger Car and Light Truck Tires

Identify new opportunities and grow your business with data and insights on replacement tires. **Here's a look at some of the latest trends in passenger car and light truck tires. . .**



225/65R17 Tires

The 225/65R17 size increased +13.2% in dollars and had the largest absolute dollar change among all sizes.

In terms of absolute dollar change, it was the top tire size in all Census divisions except Pacific.

H-rated Tires

H-rated tires contributed nearly 50% of total positive dollar volume gains, and 44% of total positive unit volume gains.

They account for 1/3 of the segment's total dollar sales and unit volume.

Touring Tires

Touring tires, which account for 36% of the dollar share of PCLT tires, posted a -$15.5MM loss during this time period.

That represents 83% of the total dollar loss in this segment.

Did you capture your fair share of the market? The NPD Group's ***Retail Tracking Service*** for replacement tires includes data from 14 channel partners, including retail and mass. It delivers unmatched point-of-sale information so you can better understand market dynamics, partner with retailers, and achieve data-driven growth. It will be available in Fall 2019.

Source: The NPD Group/Retail Tracking Service, 5 weeks (March ,3 2019 – April 6, 2019) vs. 4 weeks (March 4, 2018 – April 7, 2018)

Interested in getting more insights like this?
Contact Matt Hendrick at matthew.hendrick@npd.com
or call 216-273-7635.

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Quick Look: Canada's B2B Tech Performance

The technology distribution market in Canada is defying all odds. It continued to grow at 4% in the year ending October 2019, even though larger economic forecasts are cautious. **Here's a closer look . . .**

Within the distribution market, both hardware (+3%) and software (+7%) are growing.

+3%
Hardware

+7%
Software





Hardware growth is amplified by endpoint devices and infrastructure categories like networking:

Software growth was driven by



+7%
PCs



+4%
Networking Devices



+16%
Large Format Displays



+28%
Database & Application Development



+16%
Cloud Infrastructure & PaaS

At the NPD Group, we track sales-out data in the distribution technology channel across North America to show what IT products are selling, where, to which channel, and at what price. Our unmatched data and industry expertise are trusted to benchmark performance, guide strategic decision-making, and find the best actions for continued growth.

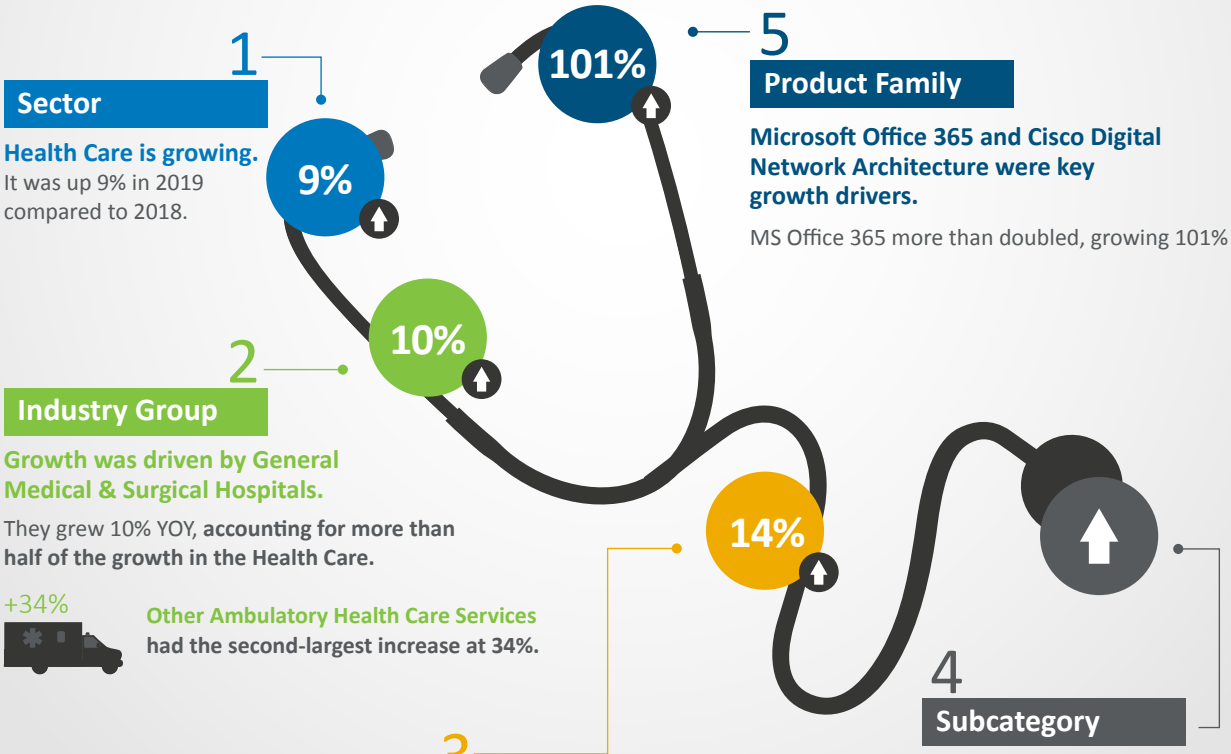
Source: The NPD Group/DistributorTrack, 12 ME October 2019

Get more insights like this. Contact Ali Naqvi at 647-723-7780
or email ali.naqvi@npd.com

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Health Care Vertical Grows 9%

In today's intensely competitive selling environment, it's more important than ever to understand what's going on in particular verticals … and that means digging down to the granular level of the products selling into those segments to see the trends. **Here's a snapshot of what's happening in Health Care.**



With our Reseller Verticals insights, you can easily compare your performance to the rest of market — vertical by vertical — and identify the fastest-growing categories, manufacturers, items, and product attributes.

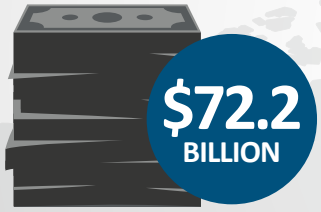
Source: The NPD Group/U.S. B2B Reseller Tracking Service, 12ME December 2019 vs. year prior
Sales are adjusted for 5-week January 2018 vs. 4-week January 2019.

Get more insights like this. Contact your NPD account representative, call Jenna Callery at 517-285-1411, or email jenna.callery@npd.com.

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North American View of B2B Tech Industry Growth

Our North America view of the B2B tech distribution market shows the industry continued to perform well across Canada, the U.S., and Mexico through the first half of 2019. Software again outpaced hardware sales, and both were trending upward as we headed into the second half of the year. **Take a closer look . . .**



Total North America technology reached $72.2B YTD.

Hardware sales were $57.3B, accounting for 74% of the market, led by total PCs (BTO and preconfigured) and networking devices.



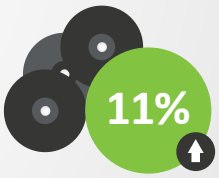


Software sales were $14.9B YTD, accounting for 26% of the market, led by IT operations and networking, business applications, and security.

Hardware dollar sales in the U.S., Canada, and Mexico grew 3% YTD.



Software dollar sales in the U.S., Canada, and Mexico grew 11% YTD vs. a year ago, 8 points faster than hardware.



Distributor Channel Growth by Country

Canada	Mexico	United States
+4% HARDWARE	-4% HARDWARE	+2% HARDWARE
+12% SOFTWARE	+12% SOFTWARE	+14% SOFTWARE

Now you can get B2B tech data for Canada, the U.S., and Mexico. This unprecedented view of the wider North American market allows you see a combined view in one currency. As retail and consumer change accelerates, you need a partner who can help you navigate the new landscape. We combine data, industry expertise, and prescriptive analytics to help you grow your business.

Source: The NPD Group/Distributor Track® for Canada, Mexico, and U.S. and Reseller Tracking Service for U.S., YTD June 2018 vs. YTD July 2019

MARKET INTELLIGENCE

Get more insights like this. Contact your NPD account representative, call Jenna Callery at 517-285-1411, or email jenna.callery@npd.com.

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Reseller Verticals — Insight Across 20 Vertical Sectors

To give you greater visibility into the technology hardware and software products that are sold to businesses across 20 vertical sectors and more than 300 vertical industry groups, our expanded Reseller Tracking Service now includes reseller vertical data. **Here's a first look at the most comprehensive view of the U.S. B2B technology reseller channel.**

Finance and Insurance

The Finance and Insurance vertical saw **the strongest growth.**



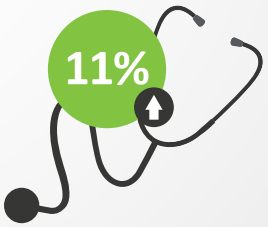
Sales up $715M YOY.

2x

This is twice as much growth as any other sector.

Healthcare and Social Assistance

Healthcare and Social Assistance was **next in terms of growth.**



The highest volume of sales went through the **General Medical and Surgical Hospitals industry group.**

> Our new Vertical Reseller Tracking information provides a one-of-a-kind solution for understanding the industry-specific trends needed to make better-informed, more effective business decisions. This data will allow companies to identify the fastest-growing categories, manufacturers, items, and product attributes within specific industry segments to uncover opportunities they otherwise may have overlooked.

Kate Roe-Semyon
President, B2B Technology, The NPD Group

Source: The NPD Group/U.S. B2B Reseller Tracking Service, 12ME October 2019. Sales are adjusted for 5-week January 2018 vs. 4-week January 2019.

Questions? Contact your account representative, call Jenna Callery at 517-285-1411, or email jenna.callery@npd.com.

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Sustainability: Consumers' Top Natural Benefit

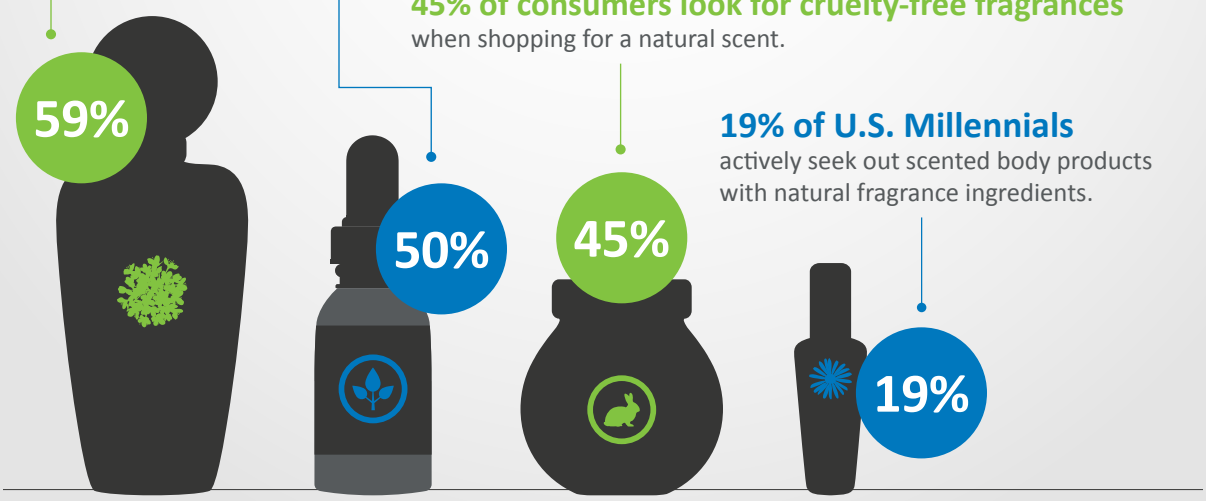
Certain U.S. consumer groups, especially Millennials, are more likely to look for fragrance products connected to a cause related to the environment. They're turning against wasteful, unethical, and environmentally damaging business practices. This movement toward "natural" stems from the rise of brands positioning themselves as ecologically sustainable, ethically sourced, socially conscious, and invested in giving back to the community. **Here's a look at some of the latest trends.**

59% of consumers are more likely to
share authentic brands with friends and family.

50% of consumers value eco-friendly, sustainable fragrances
as the #1 natural benefit, with 18 – 24 as the top age segment.

45% of consumers look for cruelty-free fragrances
when shopping for a natural scent.

19% of U.S. Millennials
actively seek out scented body products with natural fragrance ingredients.



Scentiments quickly uncovers and activates insight into how consumers think, plan, and shop for fragrance and scented products. It's an essential tool for guiding product, point-of-sale, and marketing strategies that resonate with consumers and drive growth. At The NPD Group, we combine data, industry expertise, and prescriptive analytics to help you grow your business.

Source: The NPD Group/Scentiments

Want more insights like this? Contact your NPD account representative, call 866-444-1411, or email contactnpd@npd.com.

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The Foundations of Today's Makeup Industry

The makeup category is performing well in the U.S., from both the sales and consumer perspectives. Women continue to seek out makeup products that also moisturize, reduce fine lines, minimize pores, and reduce redness. Today's makeup products offer more to the consumer, and she is taking notice. **Here's a closer look. . .**



2 out of 3 women wear makeup

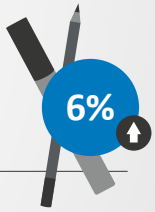
That's in addition to their use of standalone skincare products.





6% usage increase over last year

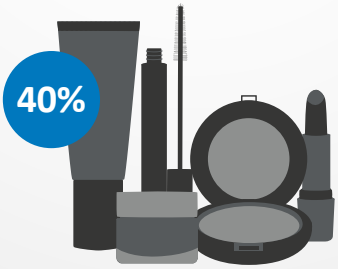
Increase driven by growing purchases of foundation, concealer, bronzer, lipstick, and lip liner.



Samples impact purchase decisions

Today, almost 4 in 10 women who have received samples report those samples strongly influenced their purchase decisions.





Women are more engaged with makeup

More women today report using 5+ products in a typical day (40% in 2018 vs. 35% in 2016).

Fastest-growing retail channels for makeup purchases

1. Mass merchants
2. Drug stores
3. Beauty specialty stores
4. Online stores
5. Department stores

The NPD Group's ***2018 Makeup Consumer Report*** delivers consumer perspectives on the makeup category, so you can understand how and why women really buy and use makeup products. It explores women's attitudes towards the makeup category, their shopping behavior and purchase influencers, plus brand awareness, usage, and perceptions. Get a winning advantage!

Source: The NPD Group / 2018 Makeup Consumer Report.

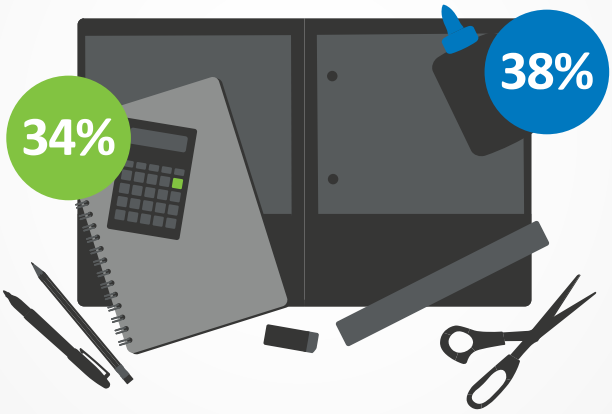
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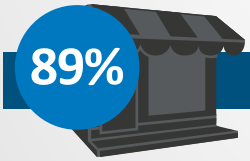
Back-to-School:
Pre-season Look Ahead

With the U.S. back-to-school season just around the corner, it's important to know what happened last year so you can anticipate what's ahead. **Here's a quick review of 2018 back-to-school season trends.**

The office supplies back-to-school season accounted for 34% of annual retail dollar sales and 46% of all unit sales. Sales reached $4.3B in 2018, down 0.3% compared to 2017.



Private label brand share reached 38% of retail sales during the 2018 back-to-school season, up 5 points from 2017 and holding the highest share compared to other quarters.*



Stores (including food and drug) dominated seasonal spending, accounting for 89% of total retail spend on supplies.

Although in-store purchases prevailed during the season, online share of retail is steadily growing
1 percentage point each year.

This is equivalent to about $500K in sales shifting online from stores.





E-commerce growth has historically helped lift retail industry sales, but **the online growth rate during the back-to-school season slowed from +17% in 2017 to +11% in 2018.**

The insights shared here are only the start of the information you can apply to your business challenges. Stay in the know about emerging trends and your competition. Make decisions that help you get ahead and win during the 2019 season and beyond!

Source: The NPD Group / Retail Tracking Service 13 WE Oct 2018 (excluding janitorial and breakroom)
**Source: The NPD Group / Retail Tracking Service, 52WE Jan 5, 2019 (excluding janitorial and breakroom)*

Want more insights like this? Contact your NPD account representative, call us at 866-444-1411, or email contactnpd@npd.com.

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The Changing Face of Makeup

Makeup usage is on the decline in the U.S., but opportunities exist to bring consumers back to the market. **Here's a look at our latest insights.**

52% of women

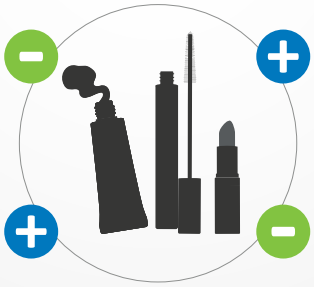
who say they are wearing somewhat less makeup make it a priority **to purchase environmentally friendly products or services.**



2 out of 5 women



who are using makeup more routinely **use their smartphones to research products they want to buy.**



More than 1/2 of women

who are wearing more makeup **believe it's a good time to make a major purchase.**



58% of women

who say they are wearing less makeup **report that they exercise every day.**



Get a jump on what's next with the latest makeup data and insights. **The Changing Face of Makeup Report** will help you understand who is driving makeup/cosmetic usage declines in the U.S. and find out who is using more makeup. The report focuses on the facts and myths about makeup declines and how wearing behavior differs by demographics. It also profiles consumers by makeup usage.

Source: The NPD Group and CivicScience/The Changing Face of Makeup Report

Want more insights like this? Contact your NPD account representative, call 866-444-1411, or email contactnpd@npd.com.

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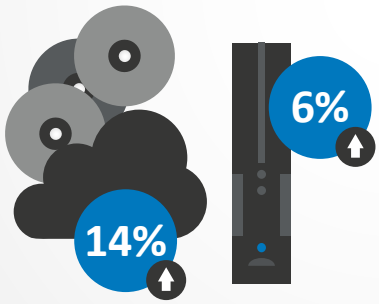
B2B Software on the Rise in Canada

There has been tremendous growth in the Canadian B2B software segments, Cloud Infrastructure as a Service (IaaS) and Platform as a Service (PaaS). Businesses that embrace the market shift toward software and cloud will be positioned for long-term growth. **Here's a look at what we're watching.**

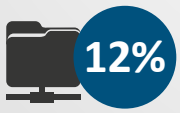
B2B software growth beats hardware

Canada B2B indirect software market +14%

Canada B2B indirect hardware market +6%



Security software growth hot spots



Data loss protection and endpoint protection

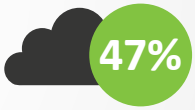
Gateway and firewall





Security information and event management

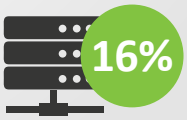
Software revenue is on the rise



Cloud IaaS and PaaS software +47%



Storage and data protection +39%



Business applications +16%



Source: The NPD Group / Distributor Track, 52 weeks ending Oct. 6, 2018 vs year-ago

Get more insights like this. Contact Ali Naqvi at 647-723-7780 or ali.naqvi@npd.com.

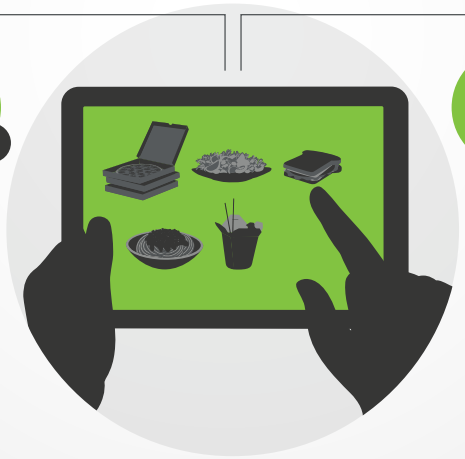
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Bright Spots in Canadian Foodservice: Digital Ordering

In Canada's foodservice market, overall traffic plodded along with 1% growth in 2017 compared to 2016. But there were a few bright spots worth noting — one of which was digital ordering. Traffic related to online/mobile ordering grew a whopping 25%. **Here's a look at our latest insights on what's happening in the digital space and where you should focus your strategy.**

Digital traffic tripled over the past five years.

3X



26%

Dollar growth tied to digital increased 26%.

50%

Age group to target? Millennials. There was growth in all groups, but Millennials accounted for 50% of the digital share.

Average eater **cheque for digital orders was 53% higher** than regular (non-digital) cheques.

53%

2X DEAL

Offer deals to drive sales — deal rate for digital is twice that of non-digital traffic.

Consumer motivations towards your digital offerings:

- Quality of food
- Specific menu items
- Need for treats

are key growth drivers for digital ordering.

Daypart to focus on? Dinner. All dayparts grew last year, but dinner accounts for 51% of digital traffic.

51%

Taking advantage of bright spots in the Canadian foodservice market is all about learning best practices, discovering what's working well in the industry, and capitalizing on growth areas. Do you know what you need to know in order to build traffic and dollar growth in 2018? Behavioural insights can inspire winning branding and communications strategies and innovation.

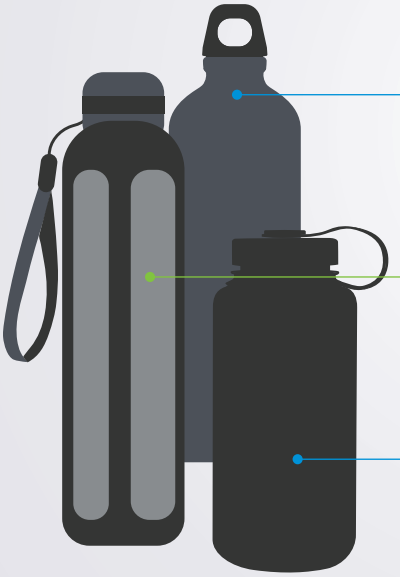
Source: The NPD Group / CREST®, 2017 vs. 2016

Get more insights like this. Contact your NPD account representative, call 866-444-1411, or email contactnpd@npd.com.

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The Shift Toward Stainless and Glass

Do you understand the shift toward health and wellness in Canada? It's a trend we're watching closely. In the small appliance industry we're seeing a move to stainless steel finishes, as well as shifts to stainless steel and glass in portable beverageware and kettle vessels, and away from plastics. **Here's a closer look.**



+15%

Stainless water bottle
sales continue to grow, up +15% in units.

2.5X

Glass water bottles
are seeing strong growth — unit sales are up 2.5 times.

42%

Acrylic water bottles
still represent the largest segment of the market with 42% of unit sales.

Over half the electric kettle unit volume is now glass or chrome/stainless steel material models,
and these are the only materials growing unit volume YOY.



With reliable weekly data and expert insight about exactly what's happening in housewares and small appliances, you can determine the size of your opportunities, react quickly to changing market conditions, and get a clear view of consumer preferences.

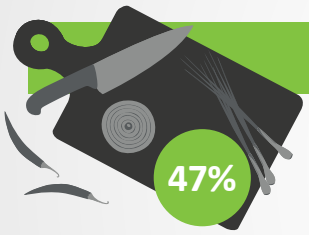
Source: The NPD Group/Retail Tracking Service, 12 ME February 2019

Get more insights like this. Visit npdgroup.ca/go/housewares or email peter.bassani@npd.com.

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Unboxing Meal Kit Delivery Services in Canada

The meal-kit business is among the fastest-growing food segments in the Canadian marketplace. Services like Chefs Plate, Goodfood, and Hello Fresh offer hectic households another option for solving the nightly dinner dilemma. **Here's a closer look. . .**



Meal Kits replace traditional meal options



47%

47% of users would have **prepared food at home**



31%

31% of users would have **purchased food from a restaurant**



18%

18% would have **purchased a ready-made meal at the grocery store**



3%

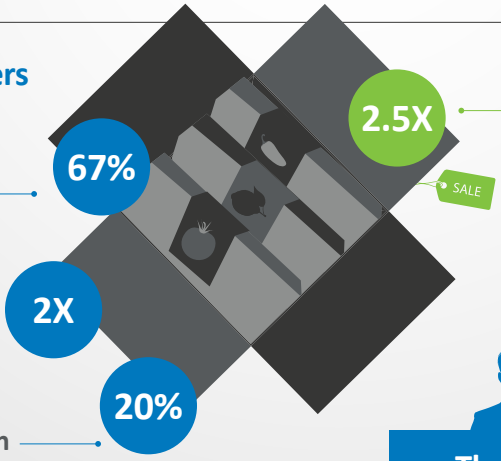
3% would have **eaten at someone else's house**

Current meal-kit users live a hectic lifestyle

67% of current users feel their life is hectic and rushed compared to 42% of non-users.

They are twice as likely to **cite convenience** as an important factor.

Households with children have been earlier adopters of meal kits — 20% have tried them.



Users motivated by pricing promotions are less likely to remain meal-kit users

Lapsed users were almost **2.5X more likely to be motivated by a coupon/ discount or free trial** to try a meal service compared to current users.



The male user is highly valuable

More than 3 out of 5 current meal kit users are male. 62% of users are male. 38% are female.

Winning in this new environment requires confident decision-making and a full understanding of Canadians' preferences, perceptions, and behaviours. Our new report, ***Thinking Inside the Box: Uncovering Meal Kit Delivery Services***, reveals how meal kits fit in with dining habits — and much more. Discover the needs met by meal kits. See new insights on their future outlook!

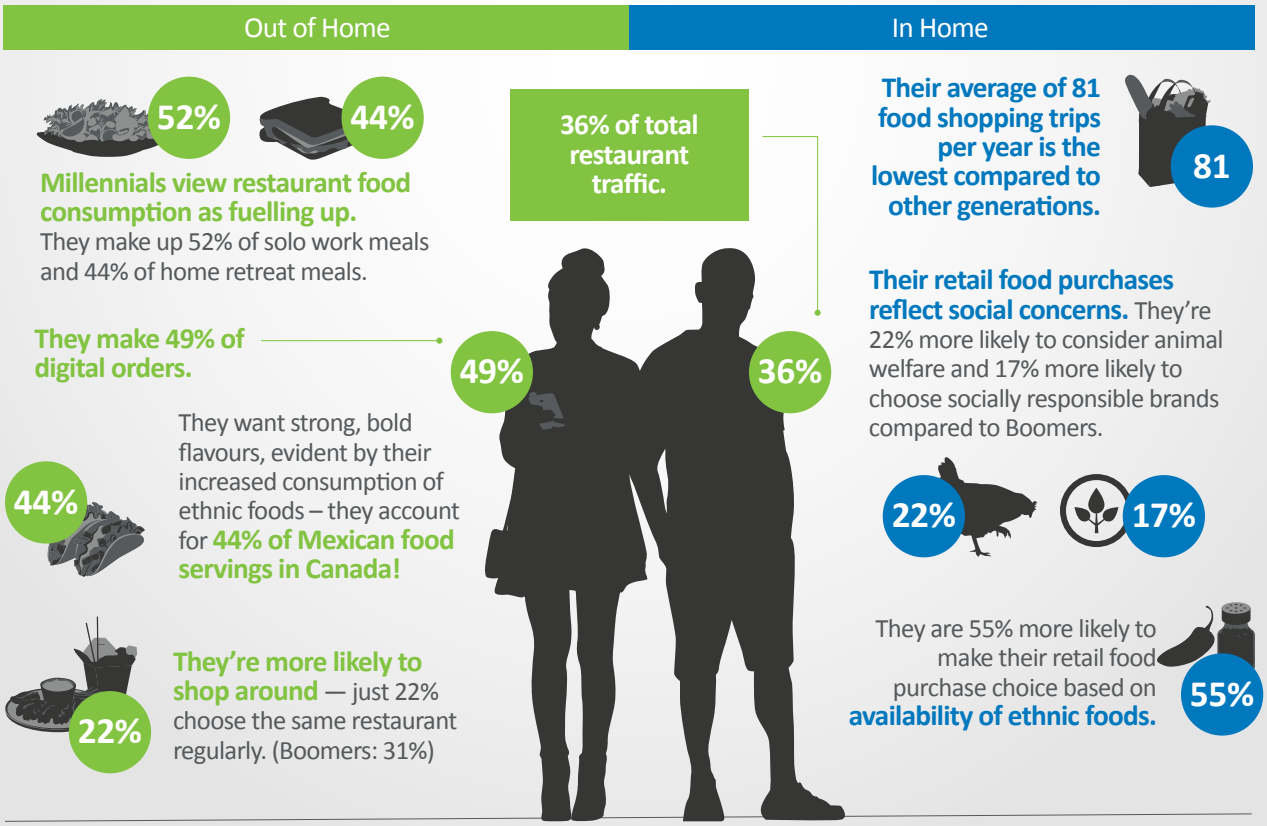
Source: The NPD Group / Thinking Inside the Box: Uncovering Meal Kit Delivery Services

Get more insights like this. Contact your NPD account representative, call us at 866-444-1411, or email contactnpd@npd.com.

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Feeding Canada's Hungry Millennials, In Home and Away

When it comes to out-of-home eating behavior and how they shop, Millennials are worth watching. Though they account for 27% of Canada's population, they have an outsized impact on food-related trends. Here's a look at what we've learned from the first release of this year's ***Eating Patterns in Canada***, developed in partnership with Nielsen.



Get an unparalleled profile and view of Canadians' eating behaviour, both in home and away from home. ***Eating Patterns in Canada*** is the definitive source for data and insight on Canadians' changing eating and drinking habits. The first of the year's three reports provides new data and insights on Canada's Millennial generation.

Source: The NPD Group and Nielsen/Eating Patterns in Canada, 2018

Learn more. Contact Robert Carter, call 647-723-7767, or email robert.carter@npd.com.

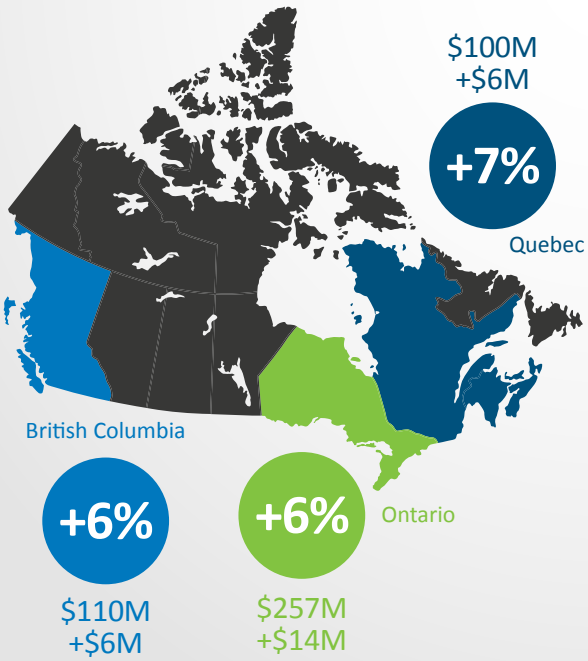
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Canada's Fastest-moving **Beauty Trends** Identified

What if you could track regional and local performance and uncover opportunities with visibility into distribution and velocity for your company and its competitors? And what if it helped you get an edge in the competitive beauty marketplace in Canada? **See what we see . . .**

Total Beauty Sales and Trend by Region

Based on prestige sales, February to April 2019



Fastest-moving Beauty Trends

Based on $ Velocity Weighted % Change vs. YAGO, February to April 2019

BRITISH COLUMBIA

Sun Products for Face	+28%	The Ordinary	+150%
Firming/Cellulite	+26%	Gucci	+54%
Sun Products for Body	+26%	Clarins	+34%
All Other Lip Makeup	+24%	Hugo Boss	+30%
Skincare Lip Treatment	+22%	Guerlain	+28%

ONTARIO

Perfume	+116%	The Ordinary	+189%
Fragrance Sets w/Ancillaries	+62%	Olaplex	+89%
All Other Lip Makeup	+27%	Nest Fragrances NY	+71%
Sun Products for Face	+25%	Oscar de la Renta	+57%
Firming/Cellulite	+25%	Salvatore Ferragamo	+53%

QUEBEC

Fragrance Sets w/Ancillaries	+51%	Charlotte Tilbury	+326%
Toners/Clarifyers	+29%	The Ordinary	+191%
Age Specialist	+25%	Phyto	+48%
Sun Products for Face	+23%	Jean Paul Gaultier	+37%
Skincare Lip Treatment	+20%	Carolina Herrera	+29%

Go beyond sales and market share. Distribution and velocity measures yield information on how successful a brand or product is by factoring in number of stores selling and the weight of those stores, for a more meaningful measure of performance. **Find out what it can do for your business.**

Source: The NPD Group/BeautyTrends® Store-Level Enabled retail tracking

Learn more about beauty trends in Canada. Contact Frank Turco at 647-723-7765 or frank.turco@npd.com.
Visit us at npdgroup.ca and on Twitter @npdcanada.

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Don't just keep up.
Grow your business.

Contractor Accelerator can help keep you from dropping the ball and give you the time to focus on growing your business not just keep up with it. Our software streamlines the entire workflow of your everyday processes from keeping track of leads, creating bids and drawings and collecting electronic contract signatures to scheduling, keeping track of project statuses, and ensuring payment have been received.

Before Process



After Process

Real-time workflow streaming from client information to emailing a bid before leaving the property. A bid can be signed and accepted simply by clicking a link within the email. They want to think about it? No problem. Simply scan through to see all open bids and follow up.

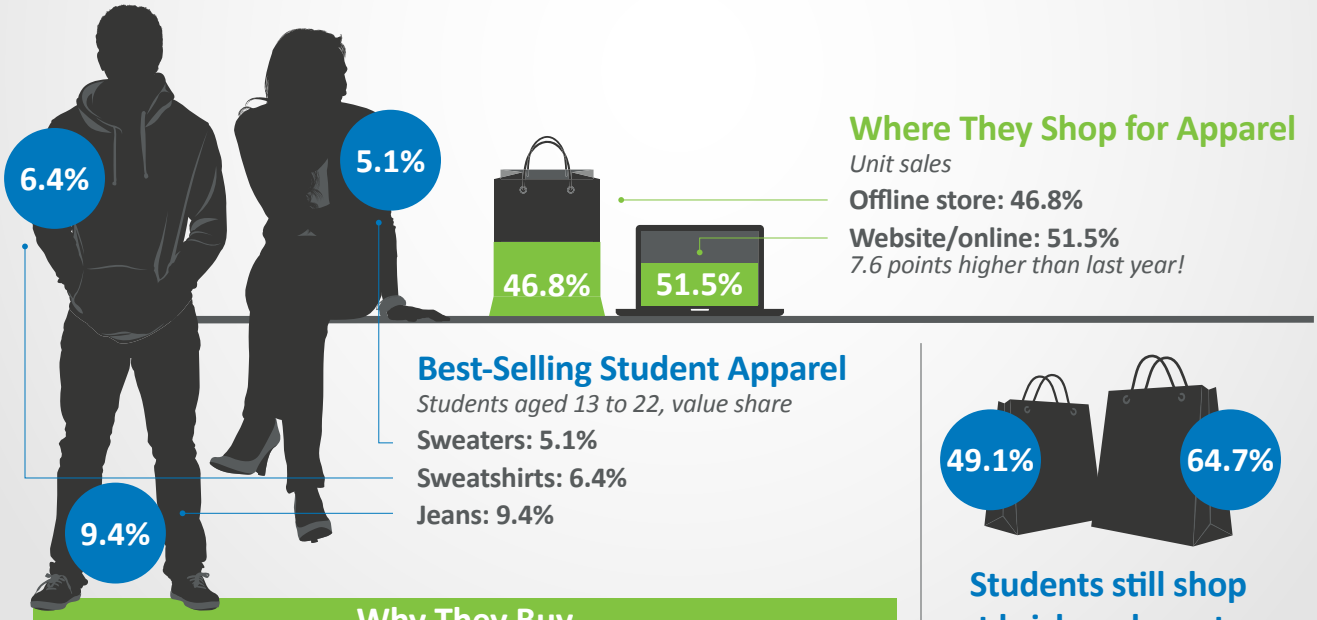


Learn more. Contact Mary Jones 123.456.7890 or via email mary.jones@contractoraccelerator.com.

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Back-to-School Apparel Shopping in China

The back-to-school season always gives apparel retailing a boost in China. To make confident decisions in China's apparel marketplace during this crucial time, you need to understand how consumers actually behave in the retail environment. And, most importantly, you must know what motivates them to buy new clothing to wear to school. **Here is a look at our latest data.**



Where They Shop for Apparel

Unit sales

Offline store: 46.8%

Website/online: 51.5%

7.6 points higher than last year!

Best-Selling Student Apparel

Students aged 13 to 22, value share

Sweaters: 5.1%

Sweatshirts: 6.4%

Jeans: 9.4%

Why They Buy

1. **Comfort**
2. **Quality**
3. **Color/Design/Look**

— This feature surpassed "Fit" this year!

Students still shop at brick-and-mortar stores in China

Students aged 13 to 17

49.1% unit share

64.7% value share

Our ***China Sports & Leisure Tracker*** delivers data and insights on actual purchases made by more than 72,000 Chinese consumers each year. We combine that data with verified third-party data and mix in our proven industry expertise, so you get answers to all your questions about the Chinese apparel market during the back-to-school shopping season and throughout the year.

Source: The NPD Group / China Sports & Leisure Tracker, April 2016 through March 2018

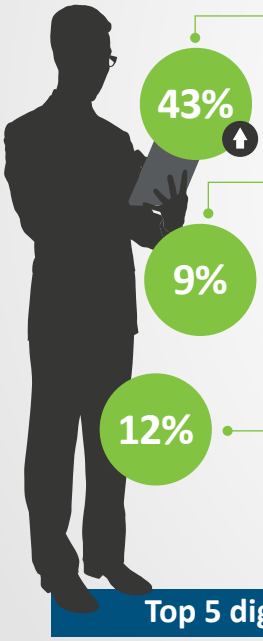
Discover why leading brands around the world rely on NPD for data-driven growth.
For more information, email eva.qian@npd.com.

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Digital Ordering Grows in China

Digital food ordering via the internet, mobile apps, and self-ordering kiosks are all on the rise in China, bringing increased consumer convenience and defining new growth for the foodservice industry. **Here's a closer look.**

Share and growth of digital ordering



Digital orders are growing at a compound annual growth rate (CAGR) of +43%.

Digital orders comprise 9% of all out-of-home foodservice traffic, which is 4 percentage points higher than in 2017.

Highest digital ordering share by age

Those born in 1990 – 2000: 12%

Those born after 2000: 11%

Category leaders and growth

Delivery accounted for 11% of orders, growing at a CAGR of 26% from 2017 to 2019.

11%

Pre-ordering service accounted for 2% of orders in 2019, growing 100% YOY.

2%

Self-ordering kiosks accounted for 1% of orders, and they are growing rapidly.

1%

Non-Chinese full service restaurants and Chinese quick service restaurants are the channels with the highest level of overall satisfaction with digital ordering.

#1

Top 5 digital ordering channels

1	Drink stations	26%
2	Coffee shops, including dessert shops	17%
3	Western quick service restaurants	15%
4	Bakeries	14%
5	Chinese quick service restaurants	10%

Top 5 growth channels

1	Drink stations	12%
2	Coffee shops, including dessert shops	11%
3	Bakeries	9%
4	Western quick service restaurants	6%
5	Chinese quick service restaurants	4%

As the industry's gold standard for market research information, CREST® offers insight on consumer purchases of commercially prepared meals and snacks in China and around the world. It tracks purchases in the commercial restaurant industry, as well as ready-to-eat foods and beverages purchased from other retail establishments such as convenience and food stores.

Source: The NPD Group/CREST®, covering 22 cities in China, 12ME June 2019

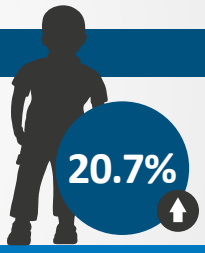
For more data and insights about the foodservice sector in China, email meredith.zhang@npd.com.

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Kids' Footwear and Apparel in China

New guidelines related to China's Second Child Policies make 2019 an influential year — all citizens will be permitted to have a second child. To encourage engagement with the new guidelines, the government has introduced a series of birth rewards and subsidies. What impact will this have on the children's footwear and apparel market in China? How will the market evolve? **Let's take a closer look at kids' apparel and footwear in China.**

Kids' apparel and footwear growth



The kids' market, even though it is the smallest market segment,
shows stronger growth than the women's and men's segments.
In the 12 months ending in March, it posted +20.7% YOY value growth.

What products are kids buying?

Compared to men's and women's, kids' has the highest footwear contribution.
49.7% of sales value comes from footwear — that is 11.5 pts more than women's and 8.2 pts more than men's.





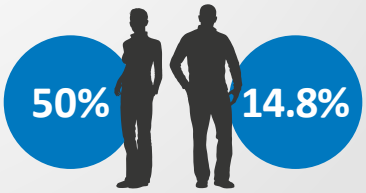
The leisure category dominates, accounting for 22.4% of total sales and growing at a healthy +21.6% YOY.

Sports categories like running and basketball accounted for 16.8% of the total share. At +27.2%, basketball is growing faster than the running category.



Who buys for kids?

For kids up to age 14, 50% of apparel and footwear sales come from **consumers aged 35 to 44.** Parents and close relatives are most likely the consumers purchasing those items.



Those in the 45-54 age group are also big buyers for kids' apparel and footwear. This group accounts for 14.8% of total kids' sales, gaining +1 pt of total share vs. last year.

NPD's **China Sports & Leisure Tracker** delivers data and insights on actual purchases made by more than 100,000 Chinese consumers each year. We add verified third-party data and our proven industry expertise, answering your questions about the Chinese sports apparel market.

Source: The NPD Group/China Sports & Leisure Tracker, 12ME March 2019 and YOY comparison

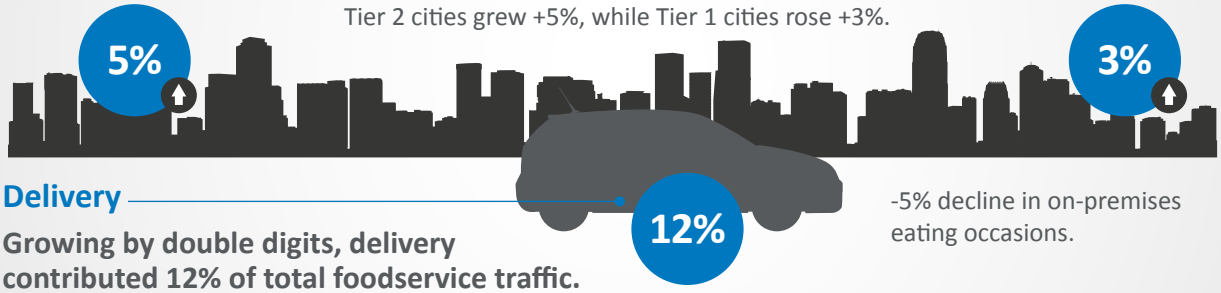
Get more insights like this.
Email suzy.wang@npd.com.

Q2 2019 Out-of-Home Eating Trends in China

In the second quarter of 2019, spending in China's foodservice market grew 4%, largely driven by increasing cheque size. **Here is a closer look.**

Consumer spending

The spending growth of Tier 2 cities is higher than that of Tier 1 cities.
Tier 2 cities grew +5%, while Tier 1 cities rose +3%.

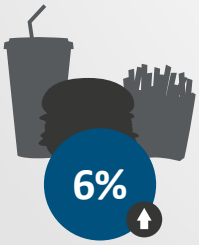


Delivery

Growing by double digits, delivery contributed 12% of total foodservice traffic.

-5% decline in on-premises eating occasions.

QSR led growth

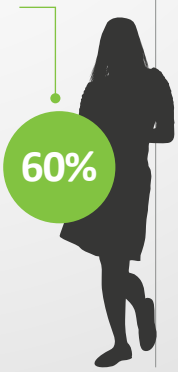


+6% growth in QSR spending was **led by an +11% rise in Western QSR and a +3% increase in Chinese QSR.**

The +5% increase in FSR spending was due to double-digit growth in non-Chinese FSR spending.

Age differences

60% of foodservice traffic came from consumers aged 25 to 44.



Market growth was driven by 35- to 44-year-olds, with an increase of +9% in visits.

Afternoon snacking momentum



Afternoon snack spending grew +13% due to both by cheque and traffic increases.

We offer insight on consumer purchases of commercially prepared meals and snacks around the globe, tracking purchases in the commercial restaurant industry, as well as ready-to-eat foods and beverages purchased from convenience stores, food stores, and other retail establishments.

Source: The NPD Group/CREST®, Q2 2019

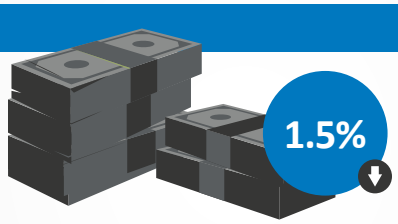
For more data and insights about the foodservice sector in China, contact Meredith Zhang at +86 21.6275.3222.

China's Shrinking Jeans Market

With American fast-fashion brand Forever21 closing its retail stores in China, following ASOS, Topshop, and other brands that have exited the country, China's "fast fashion" trend saw a slowdown. Alongside the trend shift to sports-fashion (or "Spashion"), what is the impact on China's jeans market? **Here's a closer look.**

Chinese jeans market

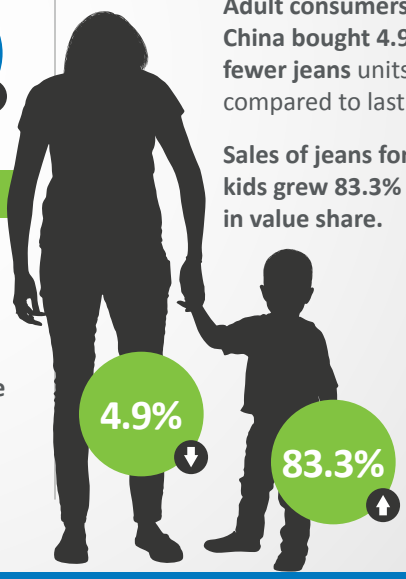
The total jeans market declined by 1.5% in value share YOY.



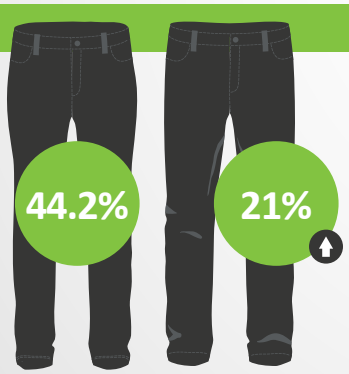
Who is buying jeans?

Adult consumers in China bought 4.9% fewer jeans units compared to last year.

Sales of jeans for kids grew 83.3% in value share.



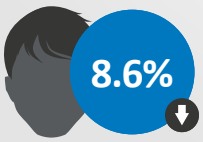
Popular jeans styles



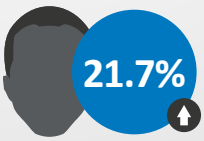
The most popular jeans style is regular bottom fit, accounting for 44.2% of total jeans value share.

The fastest-growing jeans styles are baggy, relaxed, and loose bottom-fit styles, with 21% growth in value. All other bottom-fit styles trended downward.

Sports-fashion takes a bite out of jeans sales



Consumers aged 15 to 44 spent 8.6% less on jeans YOY, preferring sports-inspired outfits, which grew 19.2%.



Those aged 45 and older spent 21.7% more on jeans than in the previous year.

The NPD Group's **China Sports & Leisure Tracker** delivers data and insights on actual purchases made by more than 100,000 Chinese consumers each year. To those powerful data assets, we add verified third-party data and our apparel analysts' industry expertise. Get answers to all your questions about the Chinese apparel market.

Source: The NPD Group/China Sports & Leisure Tracker, 12 ME March 2019 and year-over-year comparison.

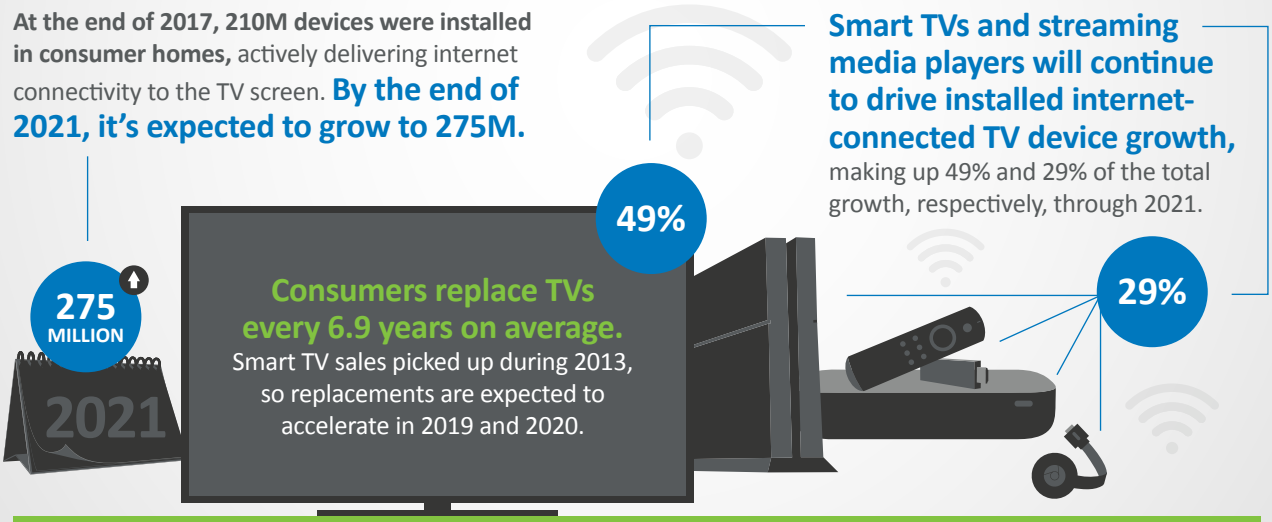
Learn more. Email suzy.wang@npd.com.

The Forecast for Internet-Connected TV Devices

Internet-connected TV devices are opening up a new world of online entertainment and information in U.S. homes. Our analysts forecast 7% compound annual growth in internet-connected TV devices in the U.S. through 2021, based on new and replacement purchases. **Here's a closer look.**

At the end of 2017, 210M devices were installed in consumer homes, actively delivering internet connectivity to the TV screen. **By the end of 2021, it's expected to grow to 275M.**

Smart TVs and streaming media players will continue to drive installed internet-connected TV device growth, making up 49% and 29% of the total growth, respectively, through 2021.



Consumers replace TVs every 6.9 years on average.
Smart TV sales picked up during 2013, so replacements are expected to accelerate in 2019 and 2020.

Smart TVs are replacing gaming consoles as the leading installed and internet-connected TV devices. What's behind this?

- **Operating Systems:** Smart TVs 40" and smaller come equipped with operating systems
- **Internet:** Internet connect rates continue to grow
- **Streaming Video Services:** Usage of streaming video services is on the rise
- **4K TVs:** Increasing 4K/UHD adoption — nearly all 4K TVs come with apps installed

It's critical to look ahead to continued growth of internet-connected devices and plan now to ensure your products and services will be compatible with future model-year devices and TVs. Our Connected Intelligence® team can help you understand consumers' purchasing trends and create winning strategies as you strive for data-driven growth.

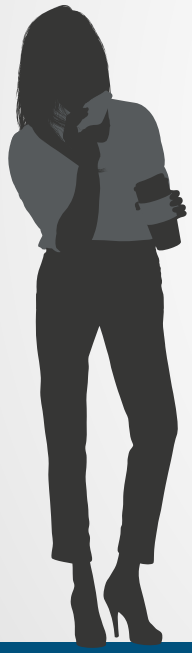
Source: The NPD Group/Connected Intelligence®, TV Connected Device Forecast and TV Ownership Trends Report

Get more insights like this. Contact Justin Sands at 858-205-9217 or email justin.sands@npd.com.

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Germany Foodservice
Out-of-Home Eating Trends, Q3 '19

The overall economic picture in Germany continues to be challenging. Despite this, the German foodservice market moved in a clearly positive direction for the third quarter of 2019. **Here is a closer look at what our CREST® data shows . . .**



3%

Visits grew over 1%, **and average eater cheque increased by 3% per visit.**

4%

Consumer spending grew 4% compared to Q3 2018.

2%

The most successful segments were quick service restaurants (QSR) and retail, which increased their visits by 2% each.

3%

A deeper look reveals growth in the retail sector again resulted purely from **3% growth in self-service at supermarkets.**

What drove QSR growth?

+4%	+3%	+2%
Pizza/Italian	Asian	Coffee Bars

What drove positive visitor trends?

+4%	+35%	+9%
Breakfast	Lunch	Weekends

While foodservice continues to grow, so does the speed of change. And it is becoming increasingly important for restaurants and manufacturers to address consumer demands as quickly as possible. Look to our CREST® consumer panel data to reveal the trends and predict consumer patterns so you can answer your key business questions.

Source: The NPD Group/CREST®, Q2 2019

For more information on the German out-of-home market, please contact us at +49 911 8918 0 or email andreas.lauszat@npdgroup.com.

npd group deutschland GmbH

Foodservice Deutschland:
Außer-Haus-Markt Trends, Q1 2019

Die wirtschaftliche Situation in Deutschland war im ersten Quartal des Jahres eher durchwachsen. Nach einem leichten Anstieg des BIP um +0,9 Prozent im vierten Quartal 2018, entwickelte sich das erste Quartal 2019 noch verhaltener. Dennoch hat sich der Außer-Haus-Markt leicht belebt – vor allem im Full Service Segment und dort primär bei vegetarischen Restaurants. **Hier nun ein genauerer Blick . . .**

+1% **Besuche**

Durchschnittsbons **+3%**

Q1 Daten weisen bereits in eine positive Richtung.

+1%



Die Besuchszahlen in **Full-Service-Restaurants (FSR) und Kantinen/ Mensen** stiegen leicht an.

+6%



Bei genauerer Betrachtung zeigt sich, dass das Wachstum der Full-Service-Restaurants hauptsächlich aus Restaurants mit der **Spezialisierung "Vegetarisch" stammt.**

-3%



Die Fast-Food-Segmente Burger und Chicken hingegen hatten die verhältnismäßig größten Verluste zu verzeichnen.

+2%



Der Handel erwies sich erneut als stabil, alleinig **getrieben durch ein Wachstum in Supermärkten.**



Die Daten aus dem ersten Quartal sprechen außerdem für einen steigenden **Konsum an Wochenenden sowie für eine Zunahme von Take-Away.**

Dieser vielversprechende Start in das neue Jahr macht Hoffnung auf einen stetigen Anstieg der Besuchszahlen im weiteren Verlauf des Jahres. Laut Prognosen der npdgroup deutschland GmbH, basierend auf dem Konsumentenpanel CREST®, kann mit einem allgemeinen Wachstum von über +1% im Gesamtjahr 2019 gerechnet werden.

Quelle: npdgroup deutschland GmbH / CREST®, Q1 2019

Für weitere Informationen über den deutschen Außer-Haus-Markt kontaktieren Sie uns bitte unter +49 911 8918 0 oder per Email an Andreas.Lauszat@npdgroup.com.

npd group deutschland GmbH

Germany Foodservice:
Out-of-Home Eating Trends, Q1 2019

Germany's economic situation was mixed in the first quarter of the year. After a slight increase in GDP of +0.9% in the last quarter of 2018, the first quarter of 2019 continued to be rather subdued. Even so, the out-of-home foodservice market ticked up slightly — especially in the full service segment and in vegetarian restaurants. **Here is a closer look . . .**

+1% **Visits**

Average Cheque **+3%**

Q1 results point in a positive direction.

+1%



Full service restaurants (FSR) and on-site (workplace and education) increased visits slightly.

+6%



Looking closer, FSR growth primarily came from **restaurants with vegetarian specialization.**

-3%



The burger and chicken fast food segments showed the greatest decline.

+2%



Retail again proved stable, purely from **growth in supermarkets.**



Q1 results also show **growth on weekends and in take-away consumption.**

The positive start to the year gives us reason to hope for continuing visit growth in 2019. The NPD Group forecasts based on the CREST® consumer panel predict overall growth of over +1% for the year as a whole.

Source: The NPD Group/CREST®, Q1 2019

For more information about the German out-of-home market please contact us at +49 911 8918 0 or email Andreas.Lauszat@npdgroup.com.

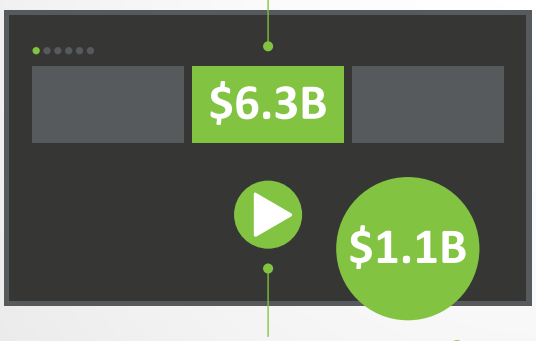
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Media Entertainment
Q3 Sales Trends

The entertainment industry's evolution is worth watching closely so you can anticipate trends and evaluate potential business opportunities and risks.
Get a closer look at what's happening with our latest insights.

Home Entertainment*

Spend reached $6.3B, +11%, **driven by subscription streaming and electronic sell-through.**

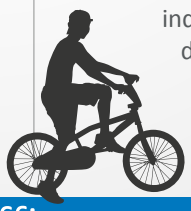


Digital was up +3% to $1.1B, **accounting for over half of transitional home entertainment.**

SVOD**

All of the Top 10 series on Netflix for the quarter were originals,
fulfilling Netflix's promise that originals really do drive subscriptions.

Audiences are still entering the Upside Down. All three seasons of Stranger Things were in the Top 10 for Q3 2019,
indicating new audiences are discovering the franchise.

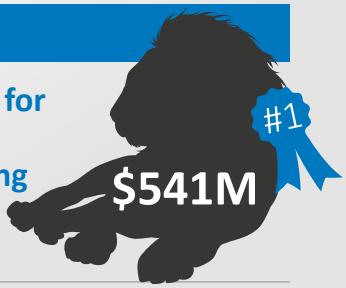


Box Office*



Reached $2.4B in Q3 2019,
+3.6%, driven by a stronger Top 5 performance.

The top-grossing title for the quarter was Disney's The Lion King (2019) +$541M.



As U.S. entertainment consumers' viewing habits evolve, you need a partner who can help you navigate the new landscape. We combine data, industry expertise, and prescriptive analytics to help you grow your business.

*Source: The Digital Entertainment Group/Mid-Year 2019 Home Entertainment Report , **Source: The NPD Group/Subscription Video Track®

Get more insights like this. To learn more, contact Sheryl Harkins at 312-282-8266 or email sheryl.harkins@npd.com.

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The Evolving Home Entertainment Market:
See What Trends We're Watching

Entertainment has never been more accessible to consumers. Whether they are streaming, downloading, renting, or buying, there are more devices and platforms and there's more content available than ever before. With all of these options comes more competition for consumers' attention and budget. **Here's a look at what we're watching in the media entertainment market . . .**

Consumers spend 1/3 of their weekly leisure hours watching movie/TV content.



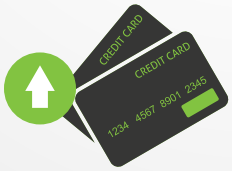
Most of this time is spent on traditional TV, followed by SVOD.

3/4 of the population engages with home entertainment.



The number of people purchasing/ renting content is the same as the number who stream from SVOD services.

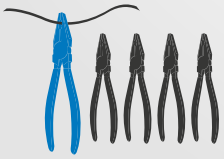
Digital purchases are being driven by core consumers buying more.



Netflix #1

Netflix remains the anchor of all SVOD subscriptions.

20% of U.S. consumers subscribe to all 3 major services (Netflix, Hulu and Amazon Prime).



1 in 5 consumers uses SVOD only.

Younger viewers (18-24) over index with SVOD.

About 1/2 of VOD renters also purchase digitally.

50% RENT BUY

The NPD Group's **Entertainment Trends in America** report is your source for insight across entertainment categories. It delivers in-depth analysis covering video, music, and video games. Explore the entertainment options competing for consumers' time, attention, and budget so you can evaluate potential business opportunities and risks.

Source: The NPD Group/Entertainment Trends in America, 2019

Get more insights like this. Contact your NPD account representative, call 866-444-1411, or email contactnpd@npd.com.

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Better-for-You Snack Foods in the Spotlight

Snack foods are a bright spot in the industry, and because U.S. consumers continue to look for ways to eat healthier, better-for-you (BFY) snack foods present opportunities across a variety of situations and needs. **See what we see in the better-for-you snack food segment . . .**

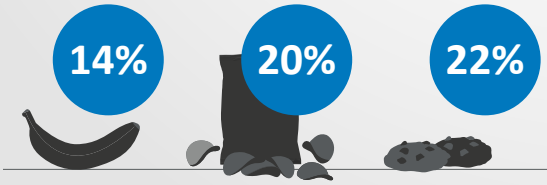


Energy/sports/nutrition/protein bars and fruit cups/applesauce are the **fastest-growing BFY snack-oriented foods.**

1/3 of BFY snack foods are eaten with a meal.



14% of BFY snack-oriented foods are eaten while consumers are watching a TV program.
Watching TV is more popular while eating sweet (22%) or savory (20%) snack foods.





Consumers are more likely to plan in advance and have BFY snack-oriented foods on hand compared to savory or sweet snack foods, which are more likely to be impulse purchases.

NOTE: The following are included in our definition of BFY snack-oriented foods: gelatin cups, refrigerated yogurt, granola bars, cereal fruit bars, cereal breakfast bars, energy/sports/nutrition/protein bars, diet bars, rice/popcorn cakes/snacks, single-serve cottage cheese cups, dried fruit, fruit cups/applesauce, fresh fruit, single-serve canned fruit, nuts, seeds.

Consumers' attention to health concerns is having an impact on food and beverage sales. It's critical to understand better-for-you snacking trends so you can stay relevant amid competition and changing generational needs. ***SnackTrack®*** captures the who, when, where, why, and how of snack-oriented food consumption, and it examines related situational and motivational dynamics. It's the definitive source for snack food consumption information in the United States.

Source: The NPD Group/SnackTrack®, two years ending June 2018

Get more insights like this. Contact your NPD account representative, call 866-444-1411 or email contactnpd@npd.com.

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The Most Important Meal of the Day

More than 160 billion morning meals were consumed in the U.S. last year, and 8 out of 10 breakfasts were eaten at home. With in-home occasions expected to grow in the next 5 years, it's important to keep track of how consumers' relationship to morning foods and beverages is evolving, with an eye toward future growth opportunities. **Here's a closer look.**



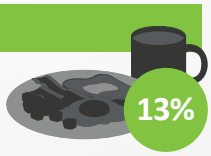
Morning themes to watch

23% of U.S. consumers **look for nutritious and healthy foods in the morning** — more than any other daypart.

Three morning-meal behavior themes

Enjoyable | Convenient | Functional

Areas of growth



13% of in-home morning meals are made with organic ingredients. In fact, the most common reason for choosing a food in the morning is "healthfulness."



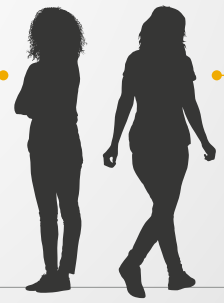
Gen Z and young Millennials are leading the rise of away-from-home morning occasions.

Handheld foods, and those that are considered "substantial" and "enjoyable," are growing fastest.

Yogurt | Eggs | Sweet snacks | Sweet breads | Breakfast sandwiches and wraps

A.M. snacking

Millennials and Boomers are leading the growth of in-home morning snacks — especially wellness-focused and functional snacks.



The top 3 morning snack growth categories:

1. Salty snacks
2. Vegetables
3. Energy drinks

Our **Future of Morning** report provides detailed information and strategic insights about U.S. consumer eating habits in home and away from home over the next five years. Make it your go-to resource for strategic planning, new product development, marketing, and more.

Source: The NPD Group/NET®, Future of Morning Report, 2019

Get more insights like this. Contact your NPD account representative, call us at 866-444-1411, or email contactnpd@npd.com.

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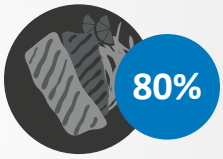
More Meals Prepared and Eaten at Home

Though you may have heard that the recent uptick in foodservice spending is tied to U.S. consumers eating at restaurants more, our data tells a different story. Consumers are actually increasing the number of meals they prepare and eat at home. **Here's a closer look.**

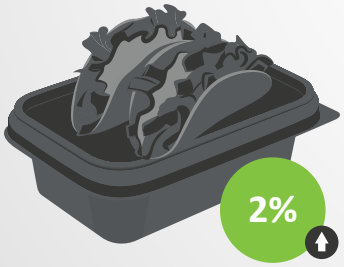
4 out of 5 meals are prepared at home

Americans still prepare more meals at home than they did a decade ago.





In 2017, over 80% of **meals were prepared and eaten in home.**



Foodservice spending has been increasing

Up 2% in the year ending May 2018 — but foodservice visits were flat in the period compared to year ago.

Foodservice spending is up primarily because **the cost of a restaurant meal is increasing faster than the cost of a home-prepared meal.**



Close to 1/2 of dinners purchased from a restaurant are **consumed at home.**

Consumers are turning to foodservice as a shortcut to in-home meal prep



Think grocery delivery, meal prep kits, grocerants (supermarkets that offer restaurant-quality foods), online ordering, and technology-enabled kitchen appliances and tools.

Blended Meals



"Blended meals," which include restaurant food or prepared food, will grow over the next 5 years.

Understanding the story of what's really happening in the food and beverage industry requires deep data and expert analysis. That's what we're here for. Get more insights like this in the just-released 33rd edition of ***Eating Patterns in America.*** Your industry's leaders won't make critical business decisions without it.

Source: The NPD Group/Eating Patterns in America, 33rd Edition, and Future of Dinner report

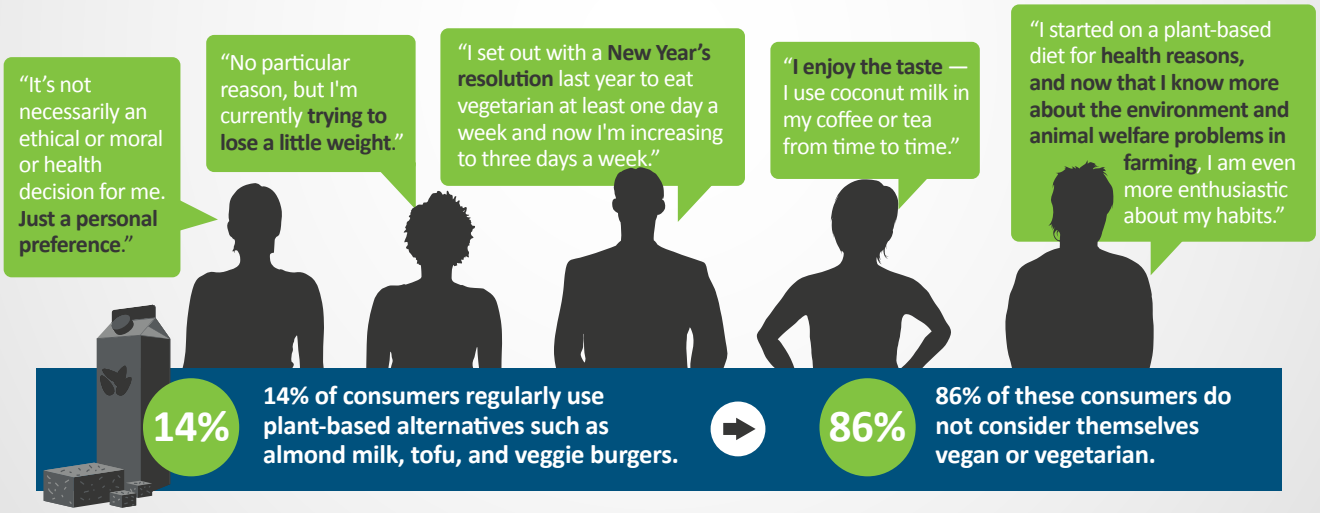
Questions? Contact your NPD account representative, call 866-444-1411, or email contactnpd@npd.com.

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Plant-Based Alternatives Harvesting Broader Appeal

There is a lot of innovation activity and consumer interest related to alternatives to animal-based food products. U.S. restaurants are getting in on the action by adding to their menus plant-based alternatives like veggie burgers. **See what we see . . .**

Why do people choose plant-based alternative products?



The view by consumer segment:

The heaviest users of plant-based alternatives
Restrictive Reactors (Usage Index: 143)
Everyday Health Managers (Usage Index: 169)

Fastest increase in usage of plant-based alternatives?
Everyday Health Managers (+90%)
Taste First Comfort Seekers (+108%)

Restrictive Reactors

- More likely to be on a diet and to have a medical condition
- More likely to monitor calories and avoid carbs.

Taste First Comfort Seekers

- Not driven by health considerations or convenience
- Taste is more important than nutrition
- No bad foods if consumed in moderation

Everyday Health Managers

- Think of food as fuel
- More convenience-oriented
- Least confident in their cooking skills

Deepening your understanding of your consumer target allows you to tailor your messaging — and that's how to have the best chance of making a connection. ***NET® Consumer Segmentation*** gets you there, providing a holistic and quantitative understanding of the consumer mindset and the needs that drive choices.

Source: The NPD Group/NET® Consumer Segmentation, YE Feb. 2018 vs. YE Feb. 2015

Learn more about our consumer segments. Contact your NPD account representative, call 866-444-1411, or email contactnpd@npd.com.

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Delivery Through 2022

As the overall U.S. foodservice industry struggles for growth, delivery is growing by leaps and bounds. To make the most of delivery as a growth driver, you need to understand the trends and technologies that will matter over the next five years. **Here's a quick look at what we're seeing.**

In the last five years, **delivery traffic increased 10%**

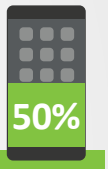


Delivery is on the rise



Sales rose 20%

More than half of all deliveries result from



digital orders

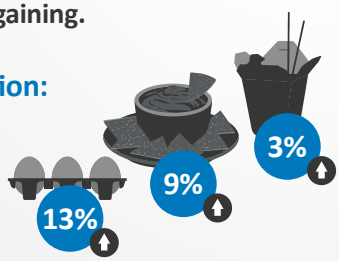
Daypart matters

Dinner is still the largest daypart for delivery, **but breakfast, lunch and p.m. snack are gaining.**

Delivery traffic distribution:

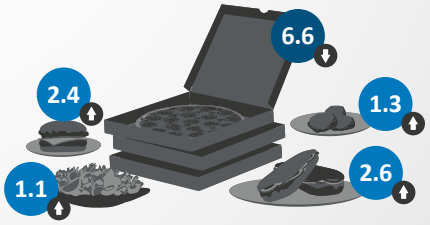
5% **Breakfast** — 13%*
29% **Lunch** — 3%*
7% **PM Snack** — 9% *

**compound annual growth*



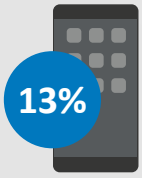
The delivery food mix is shifting

Pizza is losing share to burgers, sandwiches, nuggets, salads, and other entrées.



Third-party apps

Digital apps are an important part of delivery, but frequency differs depending on the channel and the size of the market.



Delivery traffic by order method:

7% Other digital
13% **Third-party app**
31% Delivery from restaurant app
49% Telephone for delivery



Who uses third-party apps for delivery?

The consumer profile includes:

young | diverse
wealthy | urban

The new ***Future of Foodservice Snapshot — Delivery*** report shows you what delivery options look like now and what's ahead in the future. It's how to explore the technologies and other innovations that will matter over the next five years. Understand how delivery is growing and changing so you can make confident business decisions.

Source: The NPD Group/ Future of Foodservice Snapshot – Delivery, 2018

Get more insights like this. Contact your NPD account representative, call 866-444-1411, or email contactnpd@npd.com.

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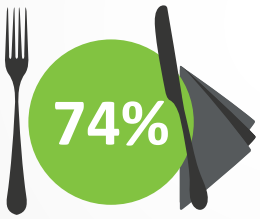
Hungry for apps?

You should be! The frozen appetizers category is worth $2.2 billion to the U.S. foodservice industry. NPD's market sizing delivers detail on your best opportunities related to this category and others. Shipment data from 700,000+ operators reveals appetizers are on the incline.

A look at the landscape

Manufacturer and operator label dominate. Distributor label making inroads.

Independents (25%), large chains (49%) account for 74% of frozen appetizer operator purchases. Large chains fueling growth.



What's hot

Top-Selling Appetizer: Nachos





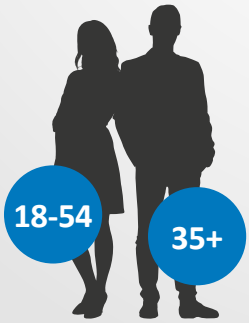
Top-Selling Frozen Appetizers: Onion Rings and Mozzarella Sticks

Other Top Choices:
Egg Rolls/Spring Rolls and Stuffed Jalapeños



Top appetizers by consumer age

Nachos and stuffed jalapeños are **popular among 18- to 54-year-olds.**



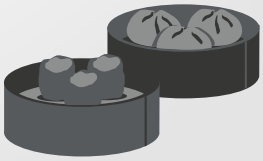
Onion rings and egg rolls **skew toward an older consumer, age 35+,** and especially those over 55.

What's ahead?

We forecast that **by 2019 frozen appetizers will be a $2.9 billion category** (+9% CAGR).

Top 3 growing subcategories:

1. Breaded Pickles
2. Dim Sum
3. Egg Rolls



Evaluate your competitive market position. Assess profitable growth opportunities. Develop strategic plans to grow your existing business. Uncover whitespace opportunities. **Market sizing for foodservice**, built on SupplyTrack® invoice-level data from more than 700,000 operators, plus data from CREST® and ReCount®, can help you identify categories you should enter based on the estimated size of the market.

Source: The NPD Group/CREST® and SupplyTrack® — includes all labels

Get more insights like this. Contact your NPD account representative, call 866-444-1411, or email contactnpd@npd.com.

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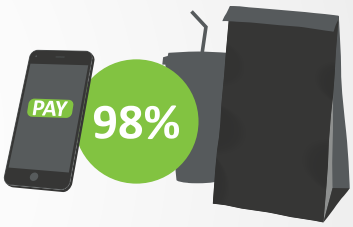
Digitally Enabled Convenience

From mobile ordering to delivery apps and order kiosks, the U.S. foodservice market is experiencing a digital evolution. New convenience-enabling technologies are a bright spot in an otherwise slow period for the industry — they're growing consistently and adding excitement. **See what we see . . .**



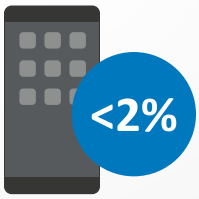
Special offers and coupons are favorite mobile app features.
Consumers want value and affordability, and mobile apps can unlock unique opportunities and offer personalized promotions.

Quick service restaurants account for 98% of mobile-pay traffic.



2 in 5 restaurant checks are paid in cash.
Even as more payment options are offered, cash is still widely used.





Fewer than 2% of all restaurant visits are paid for with mobile apps.
But usage is poised for rapid growth as more operators offer mobile payment.

What keeps consumers from using digital services for their restaurant and c-store visits?

Top Barriers

1. **No need**
   Things work fine the way they are.
2. **Human interaction**
   Prefer to talk with a person.
3. **Payment concerns**
   Prefer cash; security concerns.
4. **Technical issues**
   Concerns about errors.

The NPD Group's new ***Digital Evolution of Foodservice Report*** explores consumer awareness and use of digital services, revealing usage barriers, most- and least-liked features, and demographic and geographic differences. Find out which convenience-enabling technologies are worthy of your investment.

Source: The NPD Group / Digital Evolution of Foodservice Report, 2018

Get more insights like this. Contact your NPD account representative, call 866-444-1411, or email contactnpd@npd.com.

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Targeting the Lunch Crowd with Segmentation

Lunch is the U.S. restaurant industry's largest daypart, representing one-third of all industry traffic. It's disconcerting, to say the least, to see consumers cutting back on dining out at this daypart. To turn things around, you first need to understand why consumers are eating out for lunch less often. Then you can make more confident and effective business decisions to get lunch-goers through the doors again. **See what we see.**

Lunch is an important daypart . . .

20B visits — **20B**

$156B in sales — **$156 Billion**

33% of industry traffic — **33%**

. . . But it's getting smaller



72 Visits — Average U.S. consumer lunch visits in 2008

63 Visits — Average U.S. consumer lunch visits in 2017

"Functional" consumers slowly replaced by "Sensible Quality" consumers

55% — **55% are in the "Functional" segment** — they get lunch from a restaurant because of habit, convenience, or low prices

The "Sensible Quality" segment is gaining traction thanks to higher quality, good prices, and health and variety

Worth watching:

"Sensible Quality" Consumers

- Older Millennials
- ♂ Males
- African-American consumers
- $ Higher-income consumers

NPD's ***CREST® syndicated segmentation*** gives you a deeper, more holistic look at your customers' dining demands and the key characteristics of specific demand segments. It's how to understand what your customers want, refine your messaging, and better meet their needs . . . so you can spark renewed interest in your business.

Source: The NPD Group/CREST®, 2017

Get more insights like this. Contact your NPD account representative, call 866-444-1411, or email contactnpd@npd.com.

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Bringing Families with Kids Back to the Table

Visits by parties with kids may result in cracker crumbs and O-shaped cereal under the tables, but these customers are a critical part of the U.S. restaurant business. Their visits have slowed recently — how can you get them growing again? **See what we see . . .**

A big opportunity to regain parties with kids traffic

Since 2014, restaurant traffic among families has leveled off; opportunity exists to **win back the over 1 billion visits lost since the recession.**



Top Reasons for Visiting Restaurant with Child

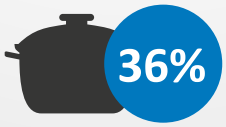
1	2	3	4	5	6
Child likes the restaurant	Good value	Convenient to get to	Kid-friendly environment	Offers a kids' menu	Offers food brands child likes
Most important among 6-12	Important across all ages	Important across all ages	Most important among 2-10	Most important among 2-10	Most important among 2-5

Source: The NPD Group/2017 Parties with Kids: Motivating More Visits Today



30% of kids asked to eat at restaurants

Nearly 1/3 of parents say decision was spurred by their children.

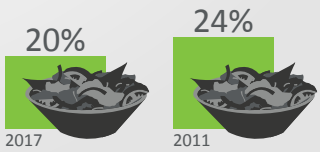


Restaurant prices keep 36% cooking at home

Price/cost is top barrier to families' restaurant visits.

FSR — fewer families dining out

FSR visits by parties with kids: 24% share in 2011 and 20% share in 2017.



Source: The NPD Group / CREST® and custom research, 2017

Parties with Kids: Motivating More Visits Today, a new report from The NPD Group, exposes the barriers to attracting families and reveals workable strategies that can help you bring them back to the table. Get a winning advantage!

Get more insights like this. Contact your NPD account representative, call 866-444-1411, or email contactnpd@npd.com.

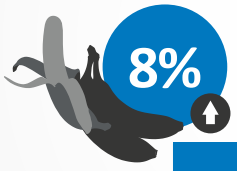
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Snack Food Takeover

Snack foods are a bright spot in the food industry as they are rapidly becoming a part of meal composition. Understanding consumption behavior and trends is a key part of continuing to grow this business. The new report, **The Future of Snacking**, tells the story. **Here's a quick look.**

Over the past decade, U.S. consumers added 19 more between-meal occasions per capita.





Snack foods at, or instead of, main meal occasions have increased 8% since 2010.

Many consumers seek snack foods with healthy benefits. **Here are their top 3:**



Fruit



Yogurt



Nuts/seeds

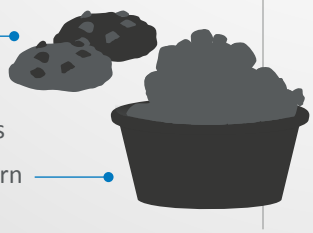
What to watch?

Sweet snacks

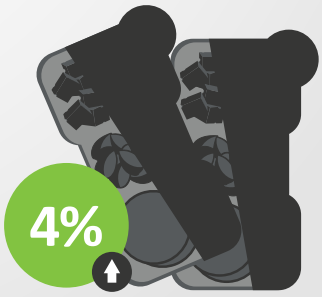
Dip kits

Snack and lunch kits

Ready-to-eat popcorn



Multi-component kits, protein-based snacks, and alternative salty snacks are poised to grow 4% by 2023.



Only NPD has more than 40 years of trend data on which to build forecasts. NPD is widely known within the food and beverage industry as a consistent source for information on consumers' eating habits — not just what they say they are doing, but what they really do — in a variety of categories, including snack foods. Discover **The Future of Snacking**.

Source: The NPD Group/The Future of Snacking, 2019

Get more insights like this. Contact your NPD account representative, call 866-444-1411, or email contactnpd@npd.com.

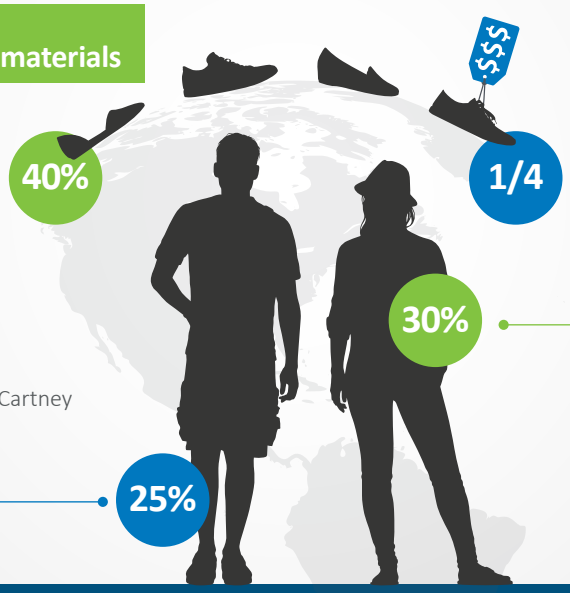
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Sustainability in Footwear

U.S. consumers are becoming increasingly aware of the environmental impact and sustainability of the products they use. As brands look to innovate, sustainability is becoming an important initiative in the footwear industry. **Here's a closer look at what's trending in sustainable footwear . . .**

Importance of eco-friendly/sustainable materials

40% of consumers say eco-friendly/sustainable materials are very (10%) or somewhat (30%) important.*



It's OK to charge a small premium

Just over one-quarter of consumers say they would pay a little more for eco-friendly/ sustainable footwear.*

More education is needed

Adidas Parley | Rothy's | Stella McCartney
Veja | Allbirds | Matt & Nat.

On average, just over 25% of consumers have heard about any of these brands.

Awareness of alternative materials

On average, 30% of consumers have **heard about footwear made from eco-friendly/ sustainable materials.**

It's about more than the actual product

80% of consumers said any of the following issues are important to them:

- Animal welfare
- Energy conservation
- Pollution reduction
- Water conservation
- Waste reduction

> Consumers — and particularly those of younger generations — are shopping smarter and letting manufacturers and retailers know they intend to purchase from brands that embrace the same values they do. Brands need to educate consumers on their efforts, not only as it relates to how their products are made, but also the policies they have in place regarding waste reduction and ethical working conditions, to make a lasting connection.

Beth Goldstein
Executive Director, Industry Analyst, Fashion Footwear, The NPD Group

*Source: The NPD Group/Omnibus, February 2019 and *CivicScience, January 2019*

Want more insights like this? Contact Abby Calleo at 516-625-7403, or email abby.calleo@npd.com.

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Video Games Spending Roars Back in January

With strong growth across hardware, software, and accessories, total year-over-year U.S. games spending surged by 59 percent in January, reaching $1.1 billion. That's the highest January total since 2011. **See what we see . . .**

January hardware spending grew a whopping 119% compared to year-ago, reaching $278 million.

PlayStation 4, Switch, and Xbox One all performed well — in fact, there was **only a 3% gap between the first- and third-ranked companies.**

Combined sales of console, portable, and PC games software **reached $517 million in January, up 51% from January 2017** — narrowly missing the January 2011 record of $549 million.

$517 Million

Software sales on PlayStation 4, Xbox One, and PC all achieved **notable growth of over 40%.**



Title Spotlight

Monster Hunter: World was the top-selling title in January.

Total accessories and gamecard spending **grew 37% YOY, reaching $301 million — the highest ever recorded in the month of January.**



The NPD Group delivers monthly point-of-sale data on U.S. video games industry sales of new physical-game retail purchases and full game downloads from participating publishers on PlayStation, STEAM, and Xbox platforms.

Source: The NPD Group/Retail Tracking Service, Games Total Physical Sales, December 2017

Get more insights like this. Contact your NPD account representative, call 866-444-1411, or email contactnpd@npd.com.

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Play To Win:
17 Sports Across 19 Countries

Consumer spending in the global sports market is growing, and that means there is abundant opportunity for companies that know how to get the right products in the right places for the right people. See what we see — by country, by sport, by use, and more. **Here's a preview of the Global Sport Estimate, Release 2018.**

5%

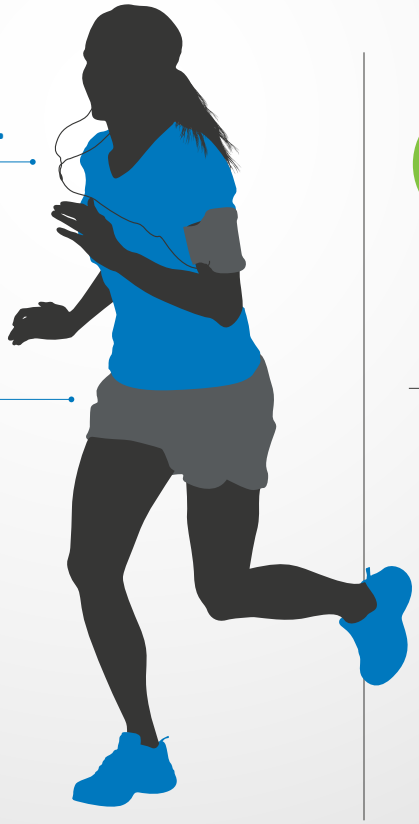
The global sports market is up by +5%.
Apparel and footwear are contributing equally to this year's growth.

#1
3x

Running is the strongest growing sports category.
In running, China is growing 3 times faster than the total market.

2/3

2/3 of growth in Asia is coming from China,
which accounts for 1/3 of the global increase.



€10B

Swimming is €10B bigger than tennis on a global level.

Tennis is showing double-digit growth in the U.S. compared to last year.



Explore new data and insights on the categories that matter to your business with the ***Global Sport Estimate, Release 2018***. For nearly a decade, it has been the go-to source of industry insight for sports industry leaders around the world. Discover the sports activities and product categories that are capturing consumers' attention and spending. This new report covers apparel, footwear, equipment, bicycles, and accessories. No other source matches its breadth and depth of sports industry insight.

~~*The NPD Group/Consumer Tracking Service *12ME July '17, Total Swim, **3ME April'18 Women's Swim, ***The NPD Group/Checkout, 12ME July'17, Total Swim*~~

Get more insights like this. Contact your NPD account representative or email contactnpd@npd.com.

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Games Industry Sales:
This July Hotter than Last

In July 2019, U.S. dollar sales of tracked video games hardware, software, and game cards totaled $762 million, a slight increase from last year's $759 million. Gains in software spending offset the declines across hardware, accessories, and games cards. **Here's a closer look . . .**

Software: $340M in July 2019

$340 MILLION

6 of the top 10 video games **were Nintendo platform exclusives**

+34% driven by Madden NFL, which launched in August 2018



Madden NFL 20 — July's best-selling video game

- **20th consecutive year** that a Madden NFL franchise game has been the best-selling title of its release month
- **#8 best-selling game YTD 2019**
- **Best-selling sports property in U.S. history**

Fire Emblem: Three Houses — #2 best-selling video game



Largest U.S. launch of a Fire Emblem game in history

3x sales of the previous best-seller in release month, Fire Emblem Echoes: Shadows of Valentia

Fire Emblem: Three Houses **instantly became the #2 best-selling game** in franchise lifetime sales, trailing Fire Emblem: Awakening

Hardware

-22% to $169M

Spending declined across all in market console platforms



Nintendo Switch again was the best-selling hardware platform of July and remained 2019's hardware sales leader

Accessories & Game Cards

-12% to $250M

Growth in gamepad spending has not been able to offset declines across other segments



Best-selling accessory: Nintendo Switch Pro Controller

The NPD Group delivers monthly point-of-sale data on U.S. video games industry sales of new physical-game retail purchases and full game downloads from participating publishers on PlayStation, STEAM, Nintendo, and Xbox platforms.

Source: The NPD Group/Games Total Physical Sales, YTD July 2019

Get more insights like this. Contact your NPD account representative, call us at 866-444-1411, or email contactnpd@npd.com.

Follow NPD's industry analyst on Twitter @MatPiscatella.

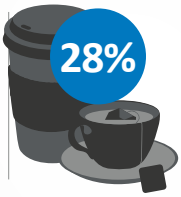
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Spilling the Beans:
Coffee vs. Tea in the U.K.

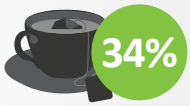
Hot drinks are a big business in the U.K. Our CREST® data shows hot drinks are included in 25% of U.K. out-of-home visits. Coffee dominates, accounting for over 70% of those visits; tea captures a more modest 26%. **Here is a look at our latest SnapMyEats insights.**



58% of U.K. foodservice buyers are coffee drinkers, purchasing at least one coffee in the first five months of the year.



28% purchase both coffee and tea — at least one of each beverage.



34% are tea drinkers, purchasing at least one tea in the first five months of the year.

Coffee penetration among men (60%) is higher than it is among women (57%).

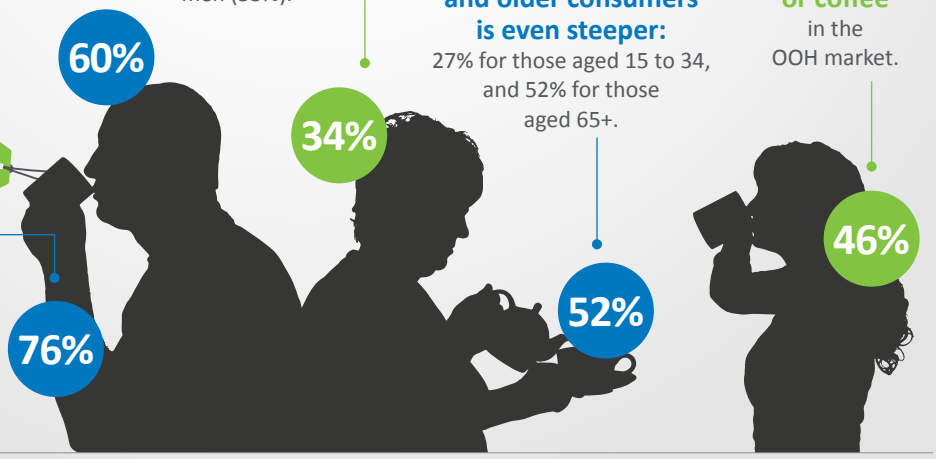
Tea penetration among women (34%) is higher than it is among men (33%).

Looking at tea consumption, the difference between younger and older consumers is even steeper: 27% for those aged 15 to 34, and 52% for those aged 65+.

46% of those in the 15 to 34 age segment never buy tea or coffee in the OOH market.

The average price for a specialty coffee drink was 2.52 GBP, down from 2.59 GBP the second half of 2018.

The older consumers are, the more likely they are to be coffee drinkers, from 48% among 15- to 34-year-olds to 76% among those aged 65+.



Our SnapMyEats service is the latest addition to our foodservice offerings in the U.K. It delivers more granular insights than any other source by capturing data every day from thousands of scanned receipts for food and beverage purchases. The SnapMyEats longitudinal panel allows us to follow the same customers' behaviour over months and monitor how those patterns change over time.

Source: The NPD Group/CREST®, 2018 and SnapMyEats, YTD May 2019

For more data and insights about SnapMyEats and the British foodservice sector, contact us at +442033184563 or contactnpd@npd.com.

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At Home with E-commerce Housewares Consumers

E-commerce has changed the way consumers shop for home products. A view into the online buyer journey provides unique insight into how the market and consumer are evolving, how to anticipate and meet the consumer's core needs, and how you can effectively target marketing efforts to capture spending dollars. **Here's a look at what our Checkout E-commerce Tracking service has revealed . . .**



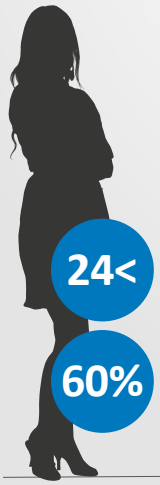
Nearly a quarter of online buyers purchased housewares in 2017, buying 3-4 of these items online during the year.



3/4 of these e-commerce buyers also **purchased home improvement items online.**



About 1/2 made kitchen appliance and home textile purchases.



Housewares private label buyers were also more likely to buy branded products like:

- Apple
- Nike
- Philips
- Samsung

than those who did not buy private label housewares brands.

They also tend to be females younger than age 24 with a household income less than $50k.

Over 60% of online buyers who purchased a private label housewares brand in 2017 **also purchased private label products outside of housewares.**



The top penetrated categories among U.S. housewares e-commerce buyers were food storage, gadgets, and tabletop.

More than 1 in 4 buyers purchased them online, outpacing the housewares industry average.

The NPD Group's newly enhanced Checkout E-commerce Tracking service is based on information collected from more than 3 million consumers through data provided by our partner Slice Intelligence. It offers the most complete and accurate view of the online channel — including first and third-party sales for Amazon, Jet.com, and Walmart.com, more than 550 e-commerce retailers, including direct-to-consumer, and an early read on emerging players.

Source: The NPD Group/Checkout E-commerce Tracking

Get more insights like this. Contact your NPD account representative, call 866-444-1411, or email contactnpd@npd.com.

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Teens Lead Athletic Footwear in Japan

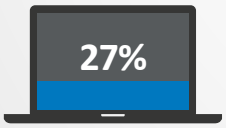
Japan's athletic footwear market growing just +1.0% over the last year. To grow your athletic footwear sales in Japan, it's critical to understand which groups of consumers are driving the market growth. **Here is a look at the importance of teens in Japan's athletic footwear market.**

Teens Lead the Market

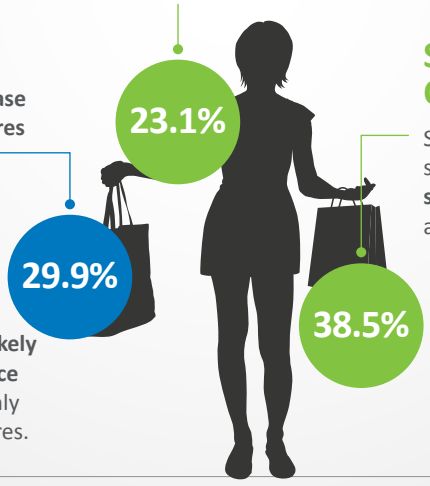
Teenagers (aged 10 to 19) in Japan contributed the most to market growth:
23.1% of market size in value terms and a +5.8% YOY growth rate.

Where They Shop

Teens in Japan are most likely to purchase athletic footwear at sporting goods stores (29.9% market size in value terms).



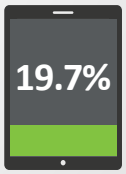
Consumers age 20 and older are most likely to buy athletic footwear at e-commerce
27.0% of market size in value terms; only 14.4% are bought at sporting goods stores.



Supporting Sporting Goods Channel Growth

Sporting goods stores have had lackluster sales lately, but **teens are helping to grow sales in this channel.** Sales to teens are account for 38.5% value share in this channel.

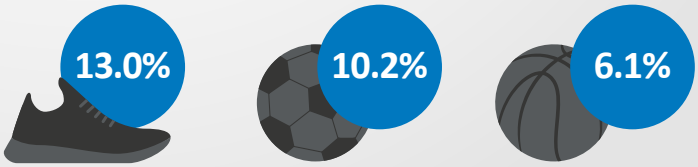
In e-commerce, the largest channel for athletic footwear, teens account for only 19.7% of sales.



For Teens, Team Sports Rule

In terms of how teenagers use the purchased athletic footwear:

**Market size in value terms*



Track and field | Football/soccer | Basketball

The NPD Group's Consumer Tracking Service delivers comprehensive information about actual purchases made by consumers in Japan. Insights include acquisition habits and purchase experiences, consumer profiles, buyer demographics, and more. Discover why leading brands around the world rely on NPD to help them achieve data-driven growth.

Source: The NPD Group/Consumer Tracking Service, 12ME March 2019 with year-over-year comparison

Get more insights like this. To learn more about sports footwear and apparel trends in Japan, contact takuma.kato@npd.com or kaori.kawabata@npd.com.

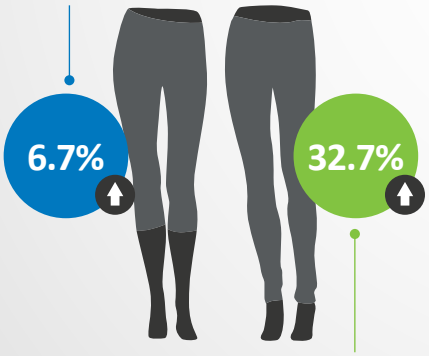
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For Sports and More, Leggings Are Booming in South Korea

In South Korea, leggings were once worn mainly for yoga and Pilates. Now South Koreans are increasingly likely to wear them for running, as gym and general fitness attire. **Here's a closer look.**

Expanding sales

The leggings category share increased at a CAGR of 6.7% over the past 3 years, while the total bottoms category (e.g., pants or leggings) grew only 0.4%.



Comfort is key, but style and fit are also important

Consumers choose leggings mainly for comfort (32.7%), followed by styling and looks (24.9%), and fit (22.5%)

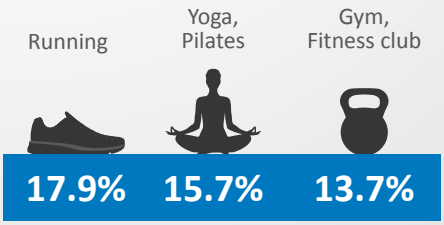
Sports growth beats non-sports growth

Leggings worn for sports purposes grew at a 10% CAGR over the past 3 years, while non-sports usage rose just 1.5%.



Key sports categories for leggings

Use of leggings for running increased 6.3 points, rising above yoga and Pilates, which together slipped 0.2 points.



With in-depth information from our Consumer Tracking Service, you get a complete view of athletic footwear and sports apparel purchases in South Korea. Insights include consumer acquisition habits and purchase experiences, buyer profiles, key demographics, and more. Discover why leading brands around the world rely on NPD to help them achieve data-driven growth.

Source: The NPD Group/Consumer Tracking Service, 12 ME March 2019 with past 3-year comparison

Learn more about global apparel trends in Korea and beyond.
Email contactnpd@npd.com.

카페 시장의 트렌드 변화

2024 년 3분기 카페 시장의 객단가는 전년대비 하락했으나 고객 수는 5% 성장하며 긍정적인 흐름을 보였습니다. 이는 전체 외식시장이 객수 감소와 객단가 상승의 경향을 보이는 것과 대조적입니다. 소비자들의 가격 민감도가 높아진 상황 속에서, 카페 시장에서의 구체적인 소비 행동 변화를

아침 시간대 이용 증가, 오후 시간대

아침 시간의 소비자가 5% 증가했으며, 이는 다른 시간대 평균 성장율보다 3배 더 높음. 소비자의 비중이 가장 큰 오후간식 시간대의 비중은 3%p 감소





아침 시간대 매장 취식 소비자는 8% 증가, 테이크아웃은 1%, 배달은

카페 시장 전체 객단가는 5,760원이고, 그 중 아침 시간대는 전체 평균 대비



카페 방문 동기의 변화

가벼운 식사	합리적 가격	다양한 메뉴
18%	18%	8%
+1.3%P	+0.8%P	+0.8%P

단순히 낮은 가격 뿐 아니라 가격 대비 메뉴 가치가 큰 곳으로 방문



저가 및 아이스 음료의 강세

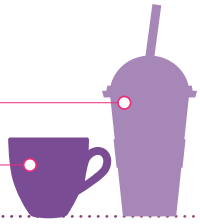
객단가 3,000원 미만의 이용자는 17% 성장했으며, 4분기 연속 전년대비 증가

커피

비중 64%, -1%p vs.

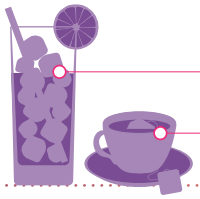
아이스 커피 +12%

뜨거운 커피 -6%



티

비중 14%, +1%p vs.



아이스 +18%

뜨거운 +6%

여러가지 변화를 맞이하고 있는 푸드서비스 시장에서 기업들은 어떠한 전략을 준비해야 할까요? Circana와 함께 소비자의 행동과 변화를 알아보고 그 솔루션을 찾아보세요.

*출처: *Circana, CREST®, 2023 vs. 2024 3 분기 TTM*

더 자세한 내용이 알고 싶다면. **contactuskorea@circana.com** 로 연락 주세요.

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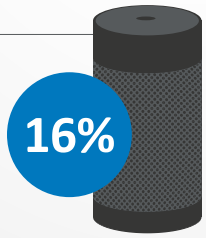
Home Automation and Streaming Audio Speakers

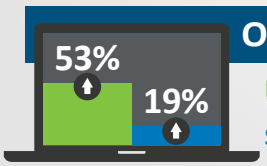
Recent growth in the home automation and voice-enabled speakers categories is worth watching. By understanding the annual value of the consumer to your brand and purchase patterns, you can harness interest in these categories and create winning bundling and cross-category promotional strategies. **See what we see . . .**



Home automation products are anticipated to grow 30% in 2018, driven by power & sensors and smart entry.

Streaming audio speakers are expected to be up 16%, powered by voice-enabled products.

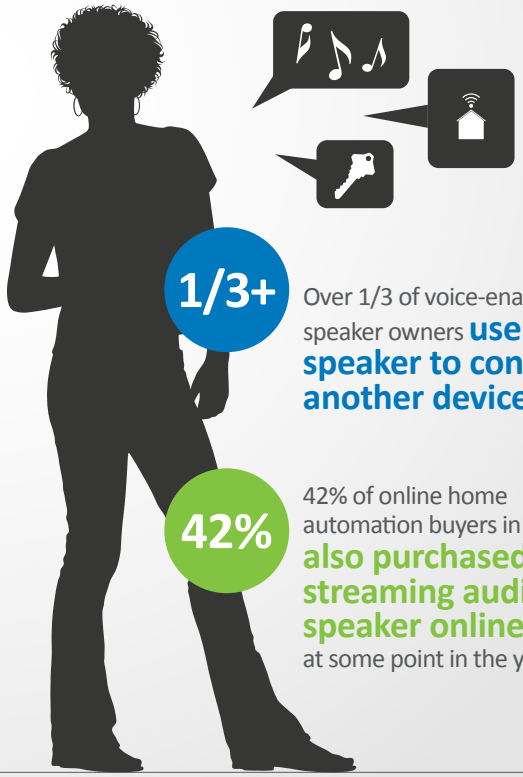




Online Revenue in 2017:

Home automation increased 53%.

Streaming audio speakers grew 19%.



Over 1/3 of voice-enabled speaker owners **use the speaker to control another device.**

42% of online home automation buyers in 2017 **also purchased a streaming audio speaker online** at some point in the year.

The NPD Group can help you plan for future success with deep and comprehensive insight into connected trends related to the types of connections and the connected devices themselves. As the tech industry's authoritative resource for technology product information, NPD provides the data and insight you need to get the right products in the right places, at the right prices, for the right people.

Source: The NPD Group/Future of Tech, Checkout E-commerce Tracking, and Connected Home Automation Report

Get more insights like this. Contact your NPD account representative, call 866-444-1411, or email contactnpd@npd.com.

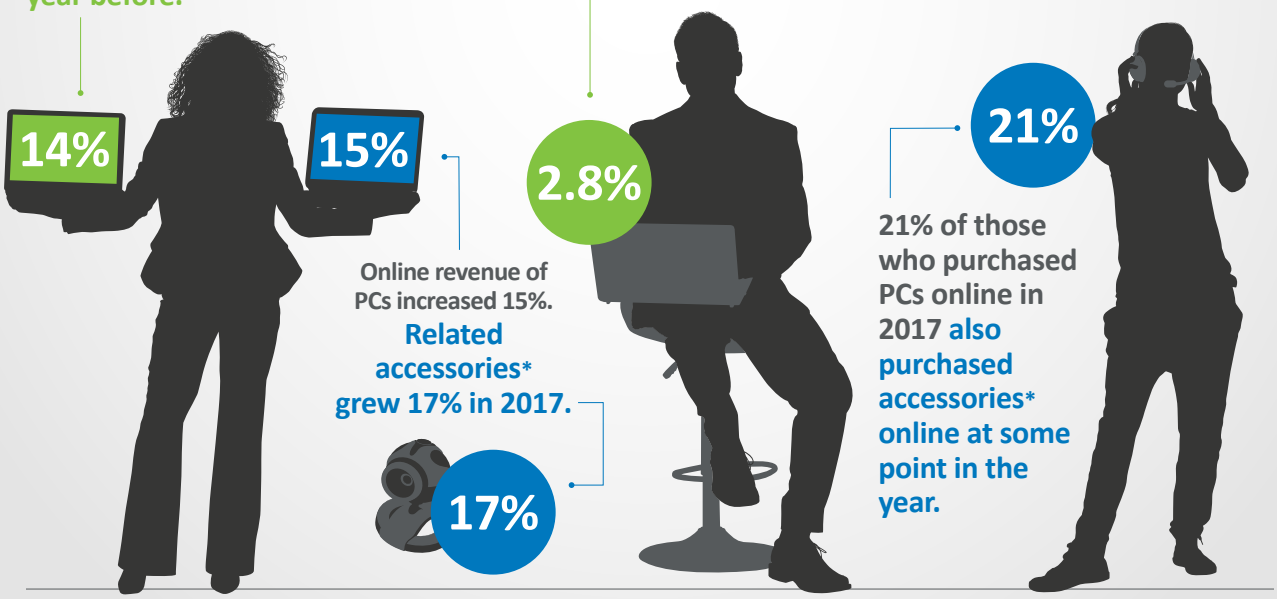
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What To Watch: Online PC Sales

In 2017, U.S. total notebook and desktop revenue increased 5%, driven by gaming and 2-in-1s. By understanding the purchase patterns and annual value of the consumer to your brand, you can harness interest in the PC category and create winning bundling and cross-category promotion strategies. **See what we see . . .**

14% of online PC buyers last year also purchased a PC online the year before.

PCs are expected to grow 2.8% in 2018, and the e-commerce channel is gaining steam.



Online revenue of PCs increased 15%.

Related accessories* grew 17% in 2017.

21% of those who purchased PCs online in 2017 also purchased accessories* online at some point in the year.

The NPD Group can help you plan for your future success with deep and comprehensive insight into connected trends related to connection types and connected devices themselves. As the tech industry's authoritative resource for technology product information, NPD provides the data and insight you need to get the right products in the right places, at the right prices, for the right people.

Source: The NPD Group/Future of Tech and Checkout E-commerce Tracking
**PC accessories category includes keyboards, mice, PC camera & PC headset/PC microphone*

Get more insights like this. Contact your NPD account representative, call 866-444-1411, or email MarketIntelligence@npd.com.

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Back-to-School 2018: July Results

The 2018 back-to-school season is in full swing in the U.S. To make the most of it this year, it's important to understand shopping behavior across all retail channels. **Take an inside look at the latest back-to-school buying behavior.**

BACK to SCHOOL

-$24 MILLION

Back-to-school spend in July 2018 was down -$24M or -1.8% vs. same time LY.



Private label accounted for nearly 26% of all office supplies dollar volume in July.

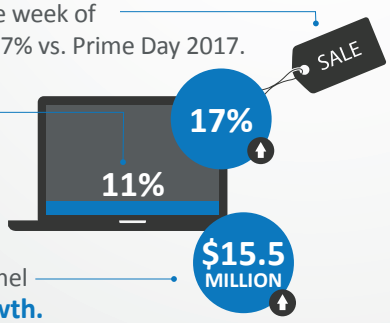
Generational Snapshot:

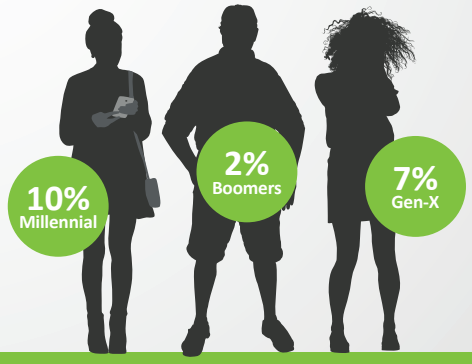
Millennials are most likely to buy school supplies for their children online (10%), followed by Gen X (7%), then Baby Boomers (2%).*

E-commerce spend during the week of **Prime Day 2018** grew by 17% vs. Prime Day 2017.

E-commerce growth continues, now **accounting for 11% of the U.S. office supplies market.**

In July, the e-commerce channel experienced **$15.5M in growth.**



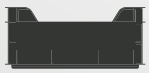


Top 5 growing subcategories:

Other notebooks



Portable storage



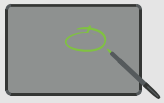
Corrugated boxes



Painting accessories



Dry erase boards



Get a jump on what's next with the latest data and insights. This is only the start of the back-to-school information you can apply to your business challenges. Uncover emerging trends. Plan successful marketing initiatives. Explore expert insights. We can help you achieve data-driven growth.

Source: The NPD Group/Weekly Retail Tracking Service (excluding janitorial & breakroom)
**Source: Civic Science Intelligent Polling, August 2018*

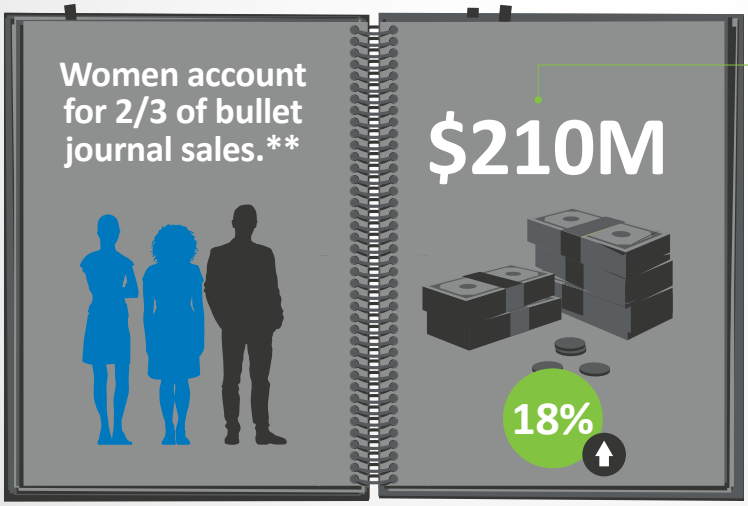
Learn more. Contact your NPD account representative, call 866-444-1411, or email contactnpd@npd.com.

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Today's Bullet Journal Craze

Creative trends such as adult coloring and slime-making took the U.S. office supplies industry by storm in recent years. Today, bullet journaling is one of the latest crazes in creative expression, and it is helping to heat up sales of traditional supplies including notebooks and writing instruments. **Here's a closer look . . .**

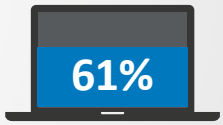
Notebooks used for bullet journaling are filled with plain, unruled pages, leaving the organization and personalization up to the individual.



Over the past year, U.S. consumers have spent nearly $210M on these notebooks
— up 18% from prior year.*



Bullet journal buyers **made more office supplies purchases online than non-buyers,** and they spent $40 more on office supplies last year.**



61% of bullet journal buyers **purchased writing instruments online** in the same year.**



Color markers | Paint markers | Permanent markers | Gel pens | Porous pens

The writing instruments commonly used for bullet journaling have also grown.*

Checkout delivers the most comprehensive view of consumer purchase behavior for general merchandise categories, across all retailers over time, to help you understand how to adjust your marketing to fuel growth.

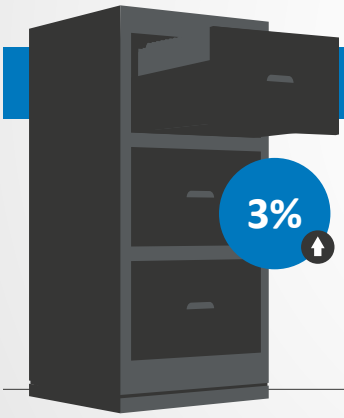
**Source: The NPD Group/ Retail Tracking Service, 52 weeks ending April 7, 2018*
*** Source: The NPD Group/ Checkout E-commerce Tracking, 12 months ending March 2018*

Learn more. Contact your NPD account representative or email contactnpd@npd.com.

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Tidying Trend Sparks Growth in Organization

The Netflix Original series, ***Tidying Up with Marie Kondo,*** has brought to U.S. households the KonMari Method of reducing clutter and organizing. Consumers are investing in the tidying craze and determining what "sparks joy" for them. As a result, storage and organization-related sales have been growing since the show's premier in January 2019. **Here's a look at the latest insights.**



Products tied to organization are growth drivers.

Top growth categories included:
File storage (+3%) | Packing products (+7%) | Laminating (+10%)

Growth in these categories accounted for a combined **$165.7M** in dollar sales in the four weeks ending February 2, 2019.

Beyond Office Supplies

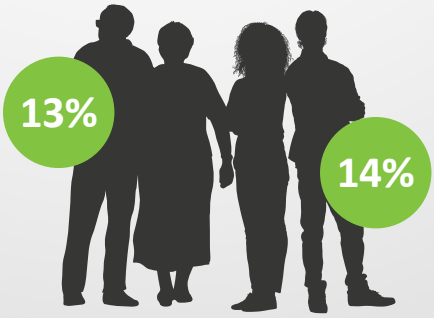
8% **Tech:** Dollar sales of label printers grew by 8% in January.

3% **Home:** Sales of food storage products increased by 3% to $1.27B in January.

Books: Kondo exceeded her 2018 book sales in the first 7 weeks of 2019.

File storage boosts spend for Millennials and Boomers.

They spent 14% and 13% more, respectively, YOY than other consumers.



Younger consumers are driving the trend online.

More consumers aged 25 to 24 purchased filing and file storage online in January 2019 compared to January 2018.

As the retail landscape continues to transform, brands and retailers need to keep track of changing consumer tastes and behaviors in order to stay relevant. Checkout, one of The NPD Group's latest innovations, gets you there.

Source: The NPD Group/Retail Tracking Service, Checkout, NPD BookScan™

Learn More. Contact your NPD account representative, call 866-444-1411, or email contactnpd@npd.com.

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The U.S. Bike Specialty Market Pedals Ahead

While U.S. cycling sales have been soft across the "rest of market" channel, the specialty channel has been stable thanks to the pockets of growth and shifts that are driving the market. In 2014, road was a larger bike category than mountain. Since then, the position has flipped as sales of mountain bikes have grown over the last three years.
Here's a closer look at 2017 cycling sales data.

The U.S. cycling market is a **$5.9 billion industry.**



Independent bicycle dealers capture about 52% of dollar sales. Rest of market captures the remaining share.



BMX specialty bike sales grew by 27% in 2017, a comeback from 2015, when the category was down.



Sales for bike services/repairs grew to 3% to $312.5M.

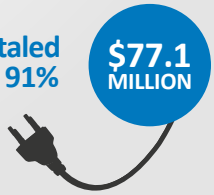
Sales in bike parts and accessories categories have been mixed, but some 2017 growth came from components, wheels, forks and suspension, and lights.



In 2017, mountain bike sales in the specialty market were $577.5M, up 3% over 2016.

The $412.8M road bike category declined by 12%.

E-bike sales in the specialty market totaled $77.1M in 2017, up 91% over 2016.
This growth is coming at higher price points.



The NPD Group's ***Retail Tracking Service*** provides the most comprehensive view of the nearly $6B U.S. cycling market. Manufacturers and retailers across all categories and channels use it to benchmark their activity and make informed, strategic choices to grow their business. See what we see.

Source: The NPD Group/Retail Tracking Service, U.S. independent bicycle dealers, 2017

Get more insights like this.
Email julia.day@npd.com or donatella.savino@npd.com.

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U.S. Golf Market Sales on the Upswing

Consumers are showing renewed interest in spending on golf, leading to market growth of +8%. Over the last few years, the market has not only recuperated — it has experienced a significant uptick in sales over the last 12 months, following shakeups in the U.S. golf retail business. **Here's a look at the latest in golf sales. . .**





Golf sales in the mass/sporting goods retail space generated $2.6B and grew by +8% after facing declines the year prior.

All golf product categories grew.

Comprising around 50% of total market sales, golf clubs grew by +7%.

Sales increases were also seen across balls (+6%), gloves (+7%), accessories (+21%), and training aids (+13%).

Callaway Golf, Titleist, and Wilson were the fastest-growing golf brands among the top 10 and also fell into the top 5 ranks.



An overall +8% increase in the market's average selling price further supports that consumers are spending on the sport.

> "The macro environment for golf has been in a turbulent state, fueled by Golfsmith's bankruptcy, major brands cutting back on their golf business, and courses closing. But today, we're starting to see normalization in the market as those deep holes are being filled. Major sports retailers are now investing in golf to pick up some of the business, and brands are also emphasizing the category to spur innovation."

Matt Powell
Vice President and Senior Industry Advisor, Sports, The NPD Group

The addition of team sports builds on NPD's sports coverage of athletic apparel, footwear, equipment, and accessories across the outdoor, running, cycling, paddle, and snow sports industries. Team sports equipment data spans retail sales across the major consumer channels, including athletic specialty, sporting goods, national chains, mass merchants, and e-commerce.

Source: The NPD Group/Retail Tracking Service, 12 ME November 2018

Want more insights like this? Contact julia.day@npd.com or call 303-402-5611.

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U.S. Golf Market Sales on the Upswing



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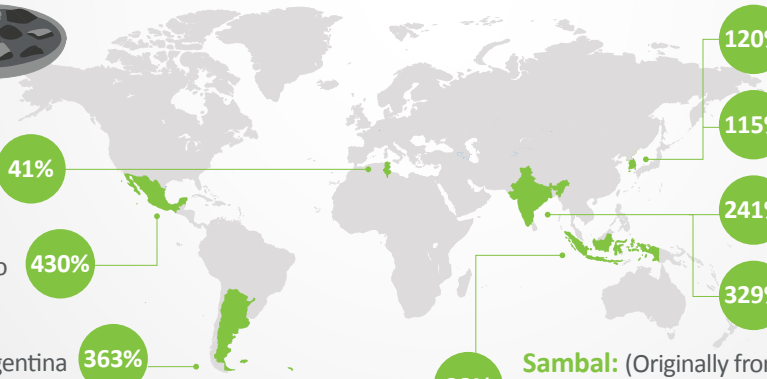
American Consumers Embracing Global Flavors

Americans' taste buds are evolving, and they want the spicy, rich, and tangy flavors that originate in far-off places like Tunisia, Argentina, India, and Indonesia. Global flavors are having a moment — and that opens the door to a world of opportunities for independent restaurants. **See what *SupplyTrack*® is telling us . . .**



These global flavors have grown over the past 12 months:

Growth in Dollars or Pounds



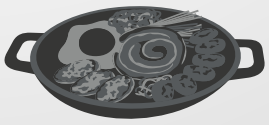
- **Harissa:** Tunisia — 41%
- **Red Baja:** Mexico — 430%
- **Chimichurri:** Argentina — 363%
- 120% **Korean BBQ:** Korea
- 115% **Hot Korean Chili:** Korea
- 241% **Curry Tikka Masala:** India
- 329% **Vadouvan:** Southeast India
- 28% **Sambal:** (Originally from Indonesia)
  - As an add-on (front of the house)
  - As an added ingredient (back of the house) — 147%

Growth of traditional condiments is modest, while adventurous flavors are on the rise.



Traditional condiments (think ketchup, mustard, mayo) are up 1.8% in LB growth. More adventurous flavors for condiments, such as hot, bbq, and ethnic flavors, are up 14%.

The top 3 designated market areas contributing to the growth of Korean bbq at bar & grill concepts:



1. Boston area
2. Chicagoland
3. Philadelphia area

SupplyTrack® is the only monthly tracking service that codes, aggregates, and tracks every product shipped from the top distributors to every operator (commercial and non-commercial) customer, revealing in-depth insights for your categories, brands, items, product attributes, and operator segments. You can use this information to view market trends, measure your performance, size the market, and develop sales optimization strategies.

Source: The NPD Group/SupplyTrack®, 12ME December 2017 (independents, micro-chains only)

Get more insights like this. Contact your NPD account representative, call 866-444-1411, or email contactnpd@npd.com.

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Home Automation Driving Sales

Technology's rapid advance shapes your ability to create innovative and impactful devices and services for consumers. Home automation is one area of the market worth noting for its embrace of technology that wows U.S. consumers. **Here's a closer look.**

Smart Speakers/Displays

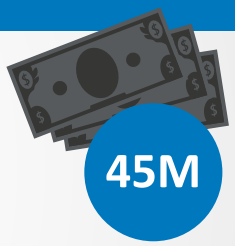
Smart display device unit sales have increased 48% over last year.
This is due in part to Facebook, Google, and others joining Amazon in the market.



24% of U.S. consumers now own at least 1 smart speaker or smart display.
Among consumers with smart homes, ownership of these devices increases to 61%.

Smart Doorbells

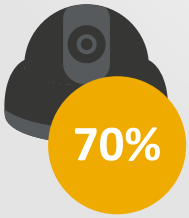
Smart doorbells have added $45M in new sales over last year.
That's the highest absolute dollar volume increase of any smart home product type.





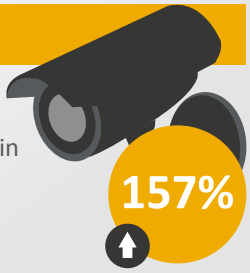
Market leader Ring increased its presence by 4 points.
And it was the only brand not new to the market this year to increase its market share.

Security Cameras



70% of dollar volume growth in this category was driven by single-pack sales.
Turn rate increased 19%.

Limited-distribution brands
saw the highest dollar growth rate within the single-pack segment, up 157%.



As retail and consumer change accelerates, you need a partner who can help you navigate the new landscape. The NPD Group combines data, industry expertise, and prescriptive analytics to help you grow your business. We're here to support your data-driven growth.

Source: The NPD Group/Retail Tracking Service, 3ME July '19 vs. LY, and Connected Intelligence® Connected Home Automation Report

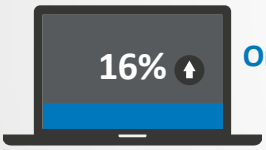
MARKET INTELLIGENCE

Get more insights like this. Contact Donatella Savino at 847-323-6160 or donatella.savino@npd.com.

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Consumer Electronics Shoppers Buy More Frequently, Spend Less Per Purchase

Despite a year-over-year rise in the total amount U.S. consumers are spending on consumer electronics (CE) online, the average amount spent on each purchase declined. Growth is mainly occurring in cell phone accessories and other items with lower average selling prices. **Here's a closer look.**



Online CE sales grew 16%.

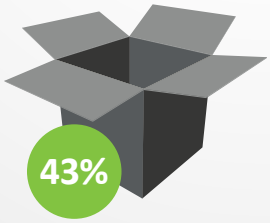
Average spend per purchase declined 7% in the same period.





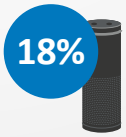
The average **annual online consumer electronics spend per buyer grew** 7%, reaching $590.

The percentage of the U.S. adult online buying population that made at least 1 CE purchase increased by 6 percentage points from the year prior, reaching 43% buyer penetration*.

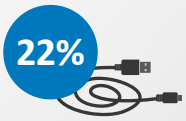


Highest buyer-penetration categories:

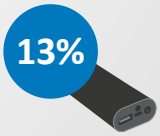
Portable audio



Cell phone accessories



Mobile power



> Growing online purchase frequency — especially for phone cases, screen protectors, portable chargers, wired headphones, and other lower-priced, grab-and-go items — is shifting customer traffic from in-store to online. This is why today's retailers are focused on driving consumers into their physical stores for TVs and other big-ticket, highly interactive purchases, allowing the online channel to focus on more transactional consumer interactions.

Stephen Baker
Vice President and Industry Advisor, The NPD Group

Source: The NPD Group/Checkout E-commerce Tracking, 12 ME May 2018 versus 12 ME May 2017
**Buyer penetration is the percentage of the U.S. adult online buying population that made at least one technology purchase during the indicated timeframe.*

Get more insights like this. To learn more, contact your NPD account representative, call 866-444-1411, or email contactnpd@npd.com.

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TV Viewing Is Not Going Away

TVs remain a mainstay in U.S. consumers' living rooms and primary bedrooms. Families with kids have the most TVs installed. The real stories in TV replacement are the living room, larger displays, and migration to 4K. Consumers are replacing their installed TVs with 4K display – the number of consumers who reported replacing an existing TV with a 4K/UHD TV grew from 23% in November 2017 to 28% in February 2018. **Here's a closer look.**

Replacement TVs key features:

45% wanted a larger screen.

39% looked for better picture quality.

24% sought something affordable.

Replacement room location and average sizes:

Living room: 52"

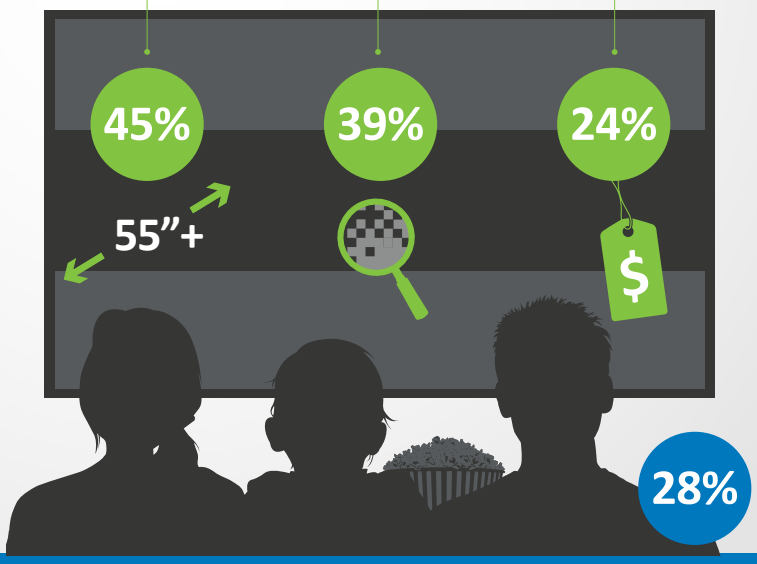


A desire for a modern, high-quality TV in the main viewing room was the primary factor.

Other household rooms: 43"



43" was the average size.



The number of consumers who reported replacing an existing TV with a 4K/UHD TV grew from 23% in November 2017, to 28% in February 2018.

Delivering the most comprehensive information on the latest retail trends, NPD is the tech industry's authoritative resource for product information. We provide the data and insight you need to get the right products in the right places, at the right prices, for the right people.

The NPD Group/Connected Intelligence®, TV Ownership Trends Report June 2018

Get more insights like this. Contact your NPD account representative, call us at 866-444-1411, or email contactnpd@npd.com.

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Smart Speaker Homes Fast Becoming Multi-Speaker Homes

Over the next few years there will be a far closer synergy between U.S. consumers owning home automation devices and those with digital assistants to control them. As consumers add more connected devices to their homes, the digital assistant becomes the natural, simpler interface to control them. In fact, device integration creates a compelling value proposition over hardwiring. It's already addressing a burgeoning consumer need and driving technology market growth. **Here's a closer look.**

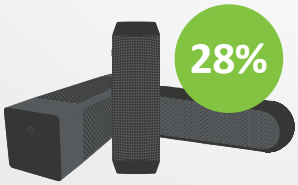


Among Owners:



Nearly half of all smart speaker owners **report owning two or more speakers.**

50%



28%

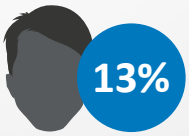
28% of smart speaker owners **have three or more speakers.**

Among Those Planning to Buy This Year:



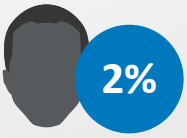
18%

Millennials are especially receptive to smart speakers, with 18% indicating a planned purchase.



13%

13% of **Younger Gen Xers aged 35-44 are also buying them.**



2%

Those aged 45+ are far less interested, with 2% or less planning to buy.

As innovation continues to transform the consumer technology market, it's more important than ever to know what the future holds. Through the ***Future of Tech*** report, NPD offers the deepest and most comprehensive information on the consumer tech trends — now and through 2019. Get the data and insight you need to get the right products in the right places, at the right prices, for the right people.

Source: The NPD Group / The Future of Tech, 2018

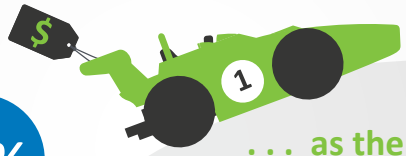
Want more insights like this? Contact your NPD account representative, call 866-444-1411, or email contactnpd@npd.com.

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Australia Toys: The State of Play

To monitor and report on what's happening in Australia's toys market, NPD's Oz Toys collects point-of-sale data from all major toy retailers. This information, combined with our analysts' deep industry expertise, delivers a comprehensive view of what's selling, to whom, and where. **Here's a look at the data.**





Unit and dollar sales slipped in 2018 . . .

12%

Toy unit sales in Australia declined 12% in 2018. Revenue fell 11%.

Excluding the two fastest-declining categories, bikes and outdoor, **toy sales declined by 8%.**

. . . as the average selling price inched up

1%



The average selling price of toys increased 1%, **reaching $14.46 in 2018.**

Growing categories

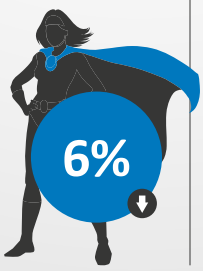
Sales revenue increased in these categories:
Youth electronics | Plush
Drawing and craft supplies | Arts and crafts





Collectibles accounted for 13% of 2018 toy sales.

Led by Funko Pop, Treasure X, and Fortnite, action figure collectibles enjoyed the largest sales gains — but the overall **action figure supercategory still fell 6.5%.**



Top 5 sales growth properties

Harry Potter | How to Train Your Dragon
Jurassic Park/World | Fortnite | Funko Pop

New versus old

3 out of the top 10 toys were new entrants for 2018, indicating that established products were still sought after.



NPD's OzToys service reports on value and unit sales and market share, pricing and distribution measures, consumer demographics, purchase drivers, and more. With the most up-to-date sales data and expert analysis, you can separate fads from trends, uncover emerging needs and opportunities, and react quickly to consumer buying behaviours and motivations.

Source: The NPD Group/OzToys, Retail Tracking Service, Dec. 31, 2018 to March 17, 2019, with YOY change

Get more insights like this. Email amelia.eng@npd.com for more information.

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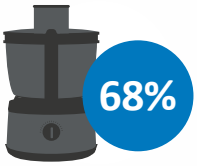
Wedding and Baby Gift Registries — Up Close

Our new ***Registry Snapshot*** highlights trends and provides new insight on the products consumers select for their wedding and baby gift registries. **Take a look at some of the latest insights . . .**

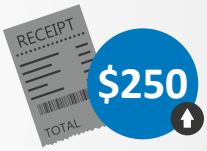
Wedding Registries



OXO is the top requested brand for wedding registries across all categories at Bed Bath and Beyond.



68% of those who have OXO on their wedding registry also **requested Cuisinart products.**



Bed Bath and Beyond has an average of $250 higher spend than the other registries tracked in the database.



Bed Bath and Beyond and Buy Buy Baby have an overall higher average of dollars requested on wedding and baby registries compared to other retailers tracked in the database.

Baby Registries

Expecting parents are primarily requesting feeding categories on their Buy Buy Baby registries, with a 25% conversion rate.

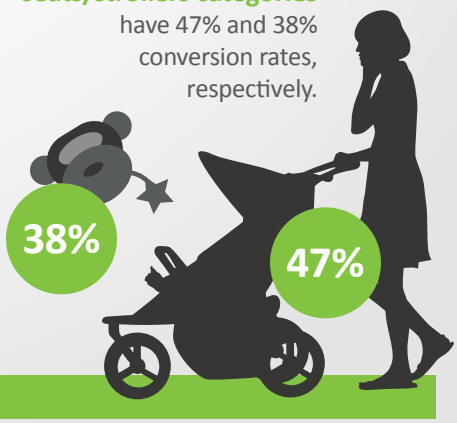


The diapering category is the second most requested category, with a conversion rate of 20%.

Pampers is the top requested brand on Buy Buy Baby registries.



On baby gift registries, the **toys and books and car seats/strollers categories** have 47% and 38% conversion rates, respectively.



Explore online gift registries by event type, retailers, and product categories with our ***Registry Snapshot***. Guide strategic marketing efforts by knowing the categories that are most important to you and your competitors. The NPD Group combines data, industry expertise, and prescriptive analytics to help you grow your business.

Source: The NPD Group/Registry Snapshot

Get more insights like this. Contact your NPD account representative, call 866-444-1411, or email contactnpd@npd.com.

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State of the Global Toy Market

Our Global Toys Report gives a new read on the market, enabling you to tackle international opportunities and invest in new global business ventures.
Here's a closer look at some of the report's insights . . .

Global Market Size

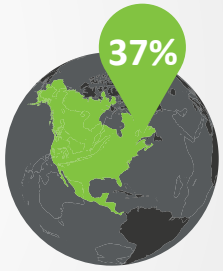
$89 BN USD
The Compound Annual Growth Rate (CAGR) for the global toy market was 2.9% from 2012 to 2017.



Annual Spend per Child & Region

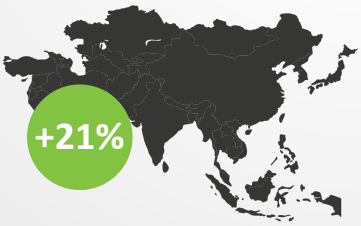
North America's spend per child is 37% larger than Europe's.

Find out the annual spend per child, per region and for the top 30 countries.



Strongest Growth Prospect

Asia is the strongest growth prospect, posting 21% growth in the last five years.



You'll see the market size by region, over time.

Global Spend per Child

The global spend per child has **increased by 11% since 2012.**

The report reveals annual spend per child, broken down by gender and key target groups over time.





For the first time, the report has been enriched to include our **forecast by region up to 2022.**

The ***Global Toys Report*** is your resource for sizing the global market by region. The report reveals the latest-available data on global toy sales, including market size, sales change over time, spend per child, and other metrics. For the 13 countries we cover, it also includes performance by supercategory and share of licensed sales by country.

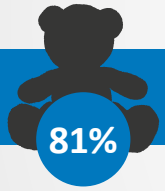
Source: The NPD Group/Global Toys Report 2017

Get more insights like this. For more information, contact your local NPD account representative or email contactnpd@npd.com.

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Toys Holiday/Christmas Gift Highlights

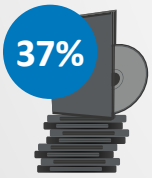
The toy industry didn't fare well during Holiday 2017. The industry is coming to terms with the fact that kids and parents start thinking about the holidays much later than they did in the past — fewer toys were sold in the last two months of 2017 than in 2016. Why? And how can you reverse this behavior? **Here's a look at the latest data and insights from our U.S. 2017 Christmas Gift Report.**



81% of children ages 7-9 received a gift in the toys, games, and puzzles category.

More than 1/2 of shoppers **waited until the end of December to complete their holiday shopping.**





37% of children ages 10-12 received a video game, and 29% received a video game console.



The budget for Christmas gifts increased to $159 per child in 2017 from $141 per child in 2016.

49% of consumers said their **child aged 10-12 received more money/gift cards** in 2017.

This was the **largest percentage for any age group.**

20% of consumers said they **purchased a family gift**.



To create the ***U.S. 2017 Christmas Gift Report***, we surveyed thousands of parents after the holiday season to ask about shopping behavior for their own children during Holiday 2017. It's a new resource for exploring and understanding toy purchase drivers and consumers' attitudes toward gift-giving to help build out your Holiday 2018 strategy. Get a winning advantage! This report is also available for Australia, Brazil, Canada, France, Germany, Great Britain, Italy, Mexico, Russia, and Spain.

Source: The NPD Group/U.S. 2017 Christmas Gift Report

Learn more. Contact your NPD account representative, call us at 866-444-1411, or email contactnpd@npd.com.

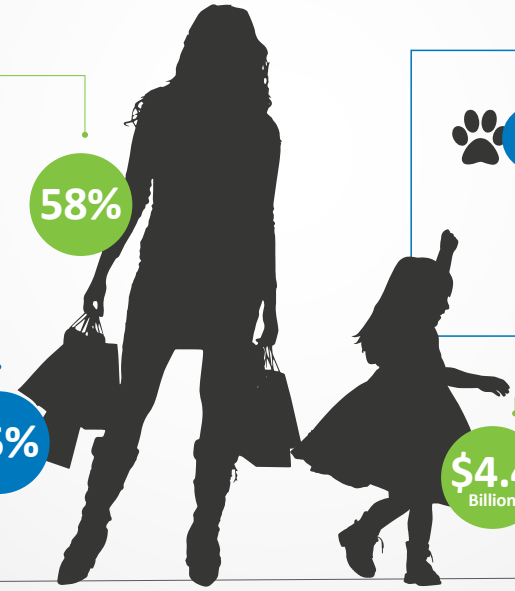
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The Kids' Licensed Products Market: Up Close

Licensees, licensors, and retailers have a strong need to understand licensing performance and opportunity by category. Now it's possible! **Here's a look at insights from our new *U.S. Kids' License Tracker.***

Sales of kids' licensed products are driven by consumers aged 25 to 44 — they made up 58% of sales.

58%



#1 **Paw Patrol was the #1 license across all industries.**

Disney Frozen came in at #2. **#2**

One quarter of kids' unit sales **featured a licensed character, personality, or sports league logo.**

25%

Clothing accounted for over $4.4B of the approximately $17B dollars in kids' licensed products — that's 25% of total sales!

$4.4 Billion



#1

NFL was the top license in clothing and sporting goods.
Mickey Mouse took the lead in arts and crafts.



1/3

While the majority of licensed product purchases for kids were made in stores, **online dollar sales accounted for more than a third** of kids' licensed products.

20%



Toys, games, and puzzles made up 20% of kids' licensed product sales.

The ***U.S. Kids' License Tracker*** is a consumer tracking service that provides a holistic view of licensed purchases spanning 17 industries. It reveals licenses' share by industry, focusing on purchases made for children up to age 14. It's a new way to uncover cross-industry licensing opportunities.

Source: The NPD Group / U.S. Kids' License Tracker, Q4 2017

Get more insights like this. Contact your NPD account representative, call us at 866-444-1411, or email contactnpd@npd.com.

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A Peek at Kids' Christmas Wish Lists

So many complex factors contributed to U.S. toy industry sales in the 2018 holiday season: price, quality- and variety-conscious consumers, media influencers demanding attention from connected consumers, and competitive retail challenges — especially in brick-and-mortar. Another factor that can't be overlooked is the power of a child's wish list. **Here's a closer look.**



57% of kids started their Christmas wish lists by the first half of November. 45% completed their lists by November 30.



For boys and girls of all ages, **toys and games and clothing and footwear tied for the #1 gifts** purchased by parents or family members.

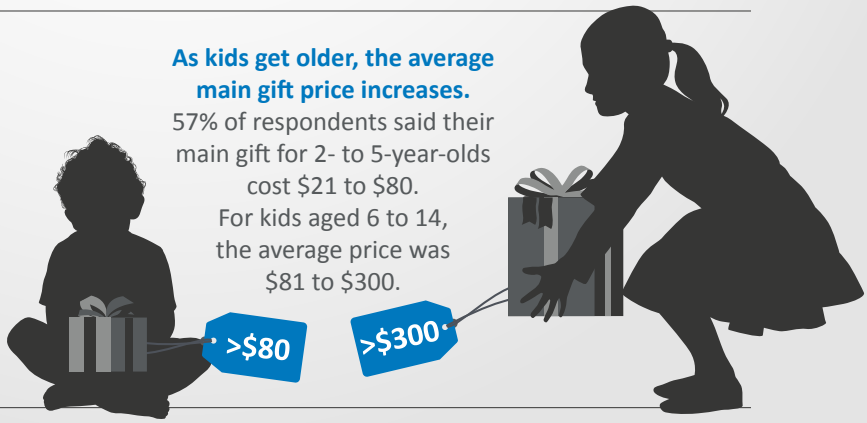


The average budget in a household with just one child was +11% in 2018. Households with two children had a smaller increase in budget (+8%) in 2018.

5-10 gifts are the average expected quantity of gifts to buy for all children up to age 14.



As kids get older, the average main gift price increases. 57% of respondents said their main gift for 2- to 5-year-olds cost $21 to $80. For kids aged 6 to 14, the average price was $81 to $300.



The **2018 Christmas Gift Study** explores more than 10 product categories that compete with toys during the holidays, the timing of Christmas shopping, budget per child, preferred shopping channels, media influencers, and more. It's a new way to understand the most important shopping season of the year.

Source: The NPD Group/2018 Christmas Gift Study

Questions? Contact your NPD account representative, call 866-444-1411, or email contactnpd@npd.com.

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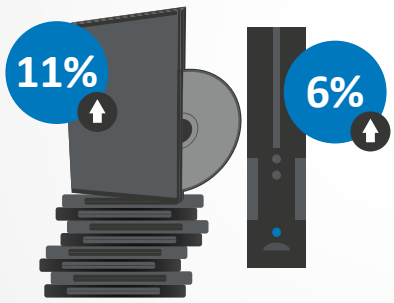
B2B Software Rising on the Cloud

There has been tremendous growth in many segments — within B2B software, and especially within cloud infrastructure-as-a-service (IaaS) and platform-as-a-service (PaaS). Businesses that embrace the shift to software and cloud innovations will be seen as innovative and positioned for long-term growth. **Here's a look at what we're watching.**

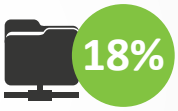
B2B software growth beats hardware

U.S. B2B indirect software market +11%

B2B indirect hardware +6%



Security software growth hot spots



Data loss protection and endpoint protection

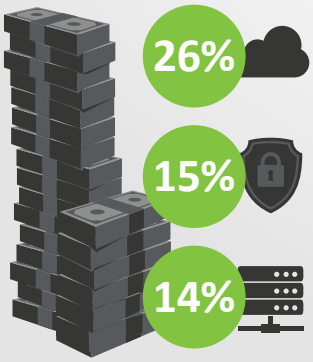
Gateways and firewalls increased





Identity and access management

Software revenue is on the rise



Cloud infrastructure and PaaS software +26%

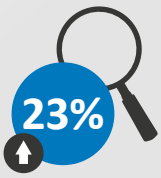
Security software +15%

IT operations and networking software +14%



IT operations and networking software makes up the largest dollar share of all B2B software and cloud services sales.

Within this segment, the **monitoring and management software category saw dollar sales increase 23%**, as businesses look for greater management oversight.



Source: The NPD Group / B2B Software and Cloud Tracking Service, 12ME February 2018

Get more insights like this. Contact Jenna Callery
517-285-1411 or jenna.callery@npd.com.

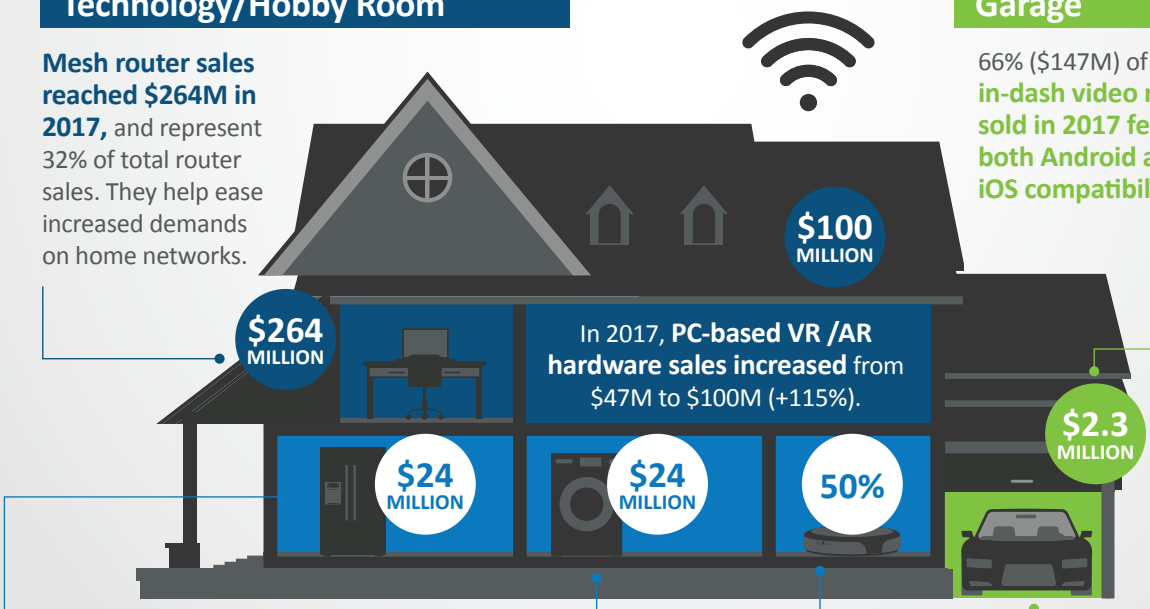
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Insights from the IoT Connected Report

Connected products exist in virtually every aspect of our lives and in many industries, from security and monitoring to smart lighting and connected speakers. Even with the rise of the Internet of Things (IoT), the U.S. consumer tech industry continues to be challenged in its efforts to sell smart home products. **See what we see . . .**

Technology/Hobby Room

Mesh router sales reached $264M in 2017, and represent 32% of total router sales. They help ease increased demands on home networks.



Garage

66% ($147M) of total retail **in-dash video receivers sold in 2017 featured both Android and iOS compatibility.**

66%

Online channel sales of electric vehicle chargers reached $2.3M in 2017.

Major & Small Appliances

Despite being in their infancy, **smart refrigerator e-commerce sales reached $24M last year.**

Online sales of connected washing machines reached $24M, and 4% of total e-commerce sales, in 2017.

Robotic vacuums accounted for 50% ($204M) of the category's total sales in 2017.

The **connected car** is poised to be the next battleground.

You need the latest data and expert insights in order to visualize market trends, strengthen brand performance, and proactively improve your future product planning as IoT connected products evolve. The second part of our new, two-part ***IoT Connected Report*** is now available to help you achieve data-driven growth.

Source: The NPD Group/Retail Tracking Service and Checkout E-commerce Tracking Service

Get more insights like this. Contact your NPD account representative, call 866-444-1411, or email contactnpd@npd.com.

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Britain's Greying Population — What's the Impact on Foodservice?

Britain's population is expected to grow +3.9% by 2022 — but it's also ageing. Per-capita visits are declining, and our forecast shows this will continue. The key to growth will be focusing on increasing the appeal of foodservice among consumers. **Here's a look at what we're watching.**

The population is ageing. Who should be your target in the future?

*We have seen **two prominent age shifts** in out-of-home visits:*

Those aged 50+: visits forecast to increase.

Adults aged 25 to 34: visits forecast to decline.

There will be **2 million more consumers over age 50** in Great Britain by 2022.



What does this mean for foodservice?

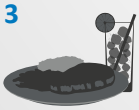
The industry **must become more relevant to consumers over age 50** in order to generate strong future growth.



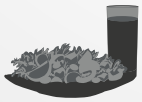
And it's critical to understand **how to regain interest among 25- to 34-year-olds**.

Top 3 and Bottom 3 Macro Channels Forecast

Top 3



Travel & Leisure



FSR



QSR

Bottom 3



Pubs



Workplace Canteens



Vending

Distribution of Out-of-Home Visits by Age Group



Age	2017	2022
< 14	11.7%	11.9%
15-24	13.5%	14.3%
25-34	19.6%	18.0%
35-49	28.5%	28.4%
50-64	18.8%	19.1%
65+	7.9%	8.3%



How will Great Britain's ageing population affect your business? Our new report, ***The Future of Foodservice Great Britain: 2022***, addresses your questions about what's ahead so you can meet consumers' needs and plan for a bright future.

Source: The NPD Group/Future of Foodservice Great Britain 2022; population forecast information from Office of National Statistics

Learn more. Contact Cyril Lavenant at cyril.lavenant@npd.com or 00 (44) 07778 771121.

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Tracking the Top Makeup Trends in 2024

After increasing in 2023, makeup usage in the U.S. remains stable this year. The beauty industry evolves quickly, and consumers continue to change the way they browse, buy, and use makeup. **Take a closer look at the latest insights …**

Makeup Usage

7 out of 10 females aged 13+ **reported wearing makeup in the past 12 months.**

A significantly greater percentage of Gen Z makeup consumers **wear makeup to creatively express themselves compared to the total makeup consumer.**



Most Engaged Demographic

41% of Hispanic makeup users said they **wear several products most days or every day.**

34% of Hispanic makeup users reported they **wear makeup more often compared to a year ago.**

Mass vs. Prestige Brands

37% of makeup users said they purchased from prestige and mass brands equally, +3 percentage points vs. year ago.



E-commerce Trends



60% of makeup users purchased makeup online, up from a year ago.

Millennials are significantly more likely than other demographic groups to be online makeup buyers at 68%.

Circana's **2024 Makeup Consumer Report** provides the complete consumer perspective on makeup. Access insights on the emerging trends, needs, and behaviors of makeup consumers to uncover motivations, inspire actions, and unlock business growth.

Source: Circana, 2024 Makeup Consumer Report

Want more? Contact your Circana account representative or miranda.tafelski@circana.com.

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Inclusive Beauty Drives Sales

The beauty industry has an outsized impact on inclusion. Consumer expectations about inclusivity — accurate and representative depictions of all genders, gender expressions, races, skin tones, ages, body sizes, abilities, and sexual orientations — have never been higher. **Take a look at the latest insights.**

Certified Inclusive brands …

1.5X **Are growing 1.5 times faster** than their less-inclusive counterparts

2.5X Were 2.5 times more likely to have **ads featuring adults with perceived age over 55**

5.3X Were 5.3 times more likely to **include diverse body sizes in their ads**

50/50 **Showed gay and straight relationships in equal percentages –** less-inclusive brands were 12 times more likely to show straight versus gay relationships

18% **Outpaced growth of less-inclusive brands** at 18% versus 12%



Circana's **Inclusive Beauty Drives Sales Report**, conducted between Circana and SeeMe Index, shares insight on how to be more inclusive. Becoming an inclusive brand — or simply becoming more inclusive — starts with understanding where your brand is today.

Source: Circana, Inclusive Beauty Drives Sales Report

Questions? Contact your Circana account representative or contactus@circana.com.

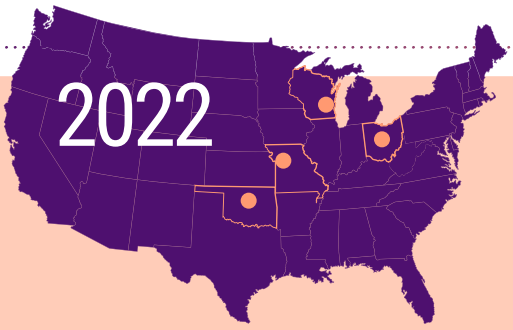
Circana.

Manga's Momentum

Print unit sales for adult comics and graphic novels reached 35.7 million in 2022, the highest volume on record for the category in **Circana BookScan**™ history (since 2004). Sales were up 4% over the previous high point in 2021, with manga contributing to 90% of the annual gains. **Take a closer look …**

Manga sales have quadrupled since 2019, **growing 27 times faster** than the total print book market

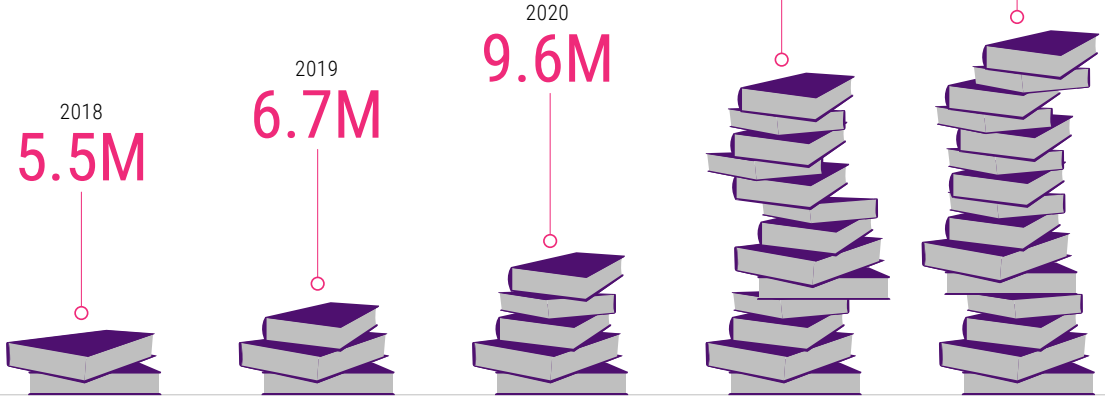
27X FASTER



Top Growth Markets

Many Midwestern cities over-indexed in manga growth in 2022, including **Oklahoma City, OK, Kansas City, MO, Milwaukee, WI, and Columbus, OH**

Comic & Graphic Novel Print Sales: MANGA



Our **U.S. Manga Data Service** is a customized Circana BookScan license reporting service delivering verified book data. It enables you to understand manga performance and trends in the comic and graphic novel market. Use it for weekly unified market views, filterable by title, series, publisher, market, IP owner, and more. Access geographic breakouts and other actionable insights to identify growth opportunities for your business.

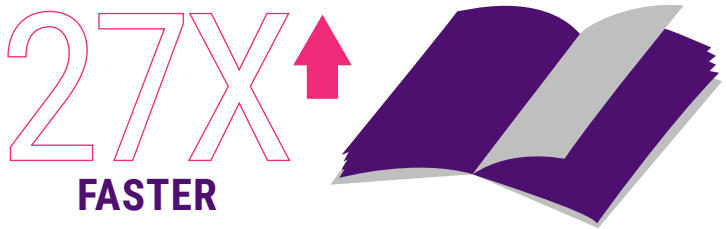
Source: Circana/Circana BookScan™ through December 2022, U.S. print unit sales only

Want more insights like this? Contact your Circana account representative, or email sheryl.harkins@circana.com.

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Manga's Momentum

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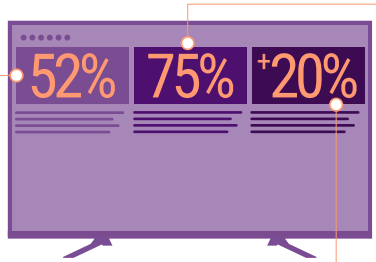
Source: Circana/Circana BookScan™ through December 2022, U.S. print unit sales only

Circana.

Viewers Trade Down to Ad-supported TV

The U.S. streaming video market is looking increasingly like the advertising-supported TV channel bundles of the 1990s. Rising prices for ad-free services and wider catalogs of available shows are propelling more homes to include free ad-supported streaming TV (FAST) into their subscription video on demand (SVOD) selections. **Here's what we're seeing …**

SVOD Impacts



75% of U.S. households subscribe to an ad-supported SVOD service

That's up from 55% just six months ago

The price gap for ad-free viewing increased 52% in the past six months

Bundling Makes a Difference

49% of consumers who subscribe to bundled services see it as **a good way to save money**



45% would like more customizable bundled options available

Increased Usage of FAST services

60%

FAST accounts for 60% of viewing homes



19.7M

These services reach a daily audience of 19.7 million U.S. households

#1 reason for increasing usage is the availability of TV shows



"Cost management has a prominent role in TV consumption decisions, and this focus is multiplying ad-supported TV. Consumer shifts present significant opportunities for advertisers as these audiences are poised to scale rapidly. The industry will reap the rewards of recent and upcoming strategies to bundle SVOD services, even when bundling with competitive platforms." **— John Buffone, Vice President and Media Entertainment Industry Advisor, Circana**

Source: Circana, TV Switching Study, 2024

Questions? Contact your Circana account representative or email contactus@circana.com.

Circana.

Video Games Spending Regains Ground in April

April 2018 spending across U.S. video game hardware, software, accessories, and game cards grew 18% compared to a year ago, to $823 million. Gains were achieved across all categories of spending. Year-to-date spending across these categories is up 15% compared to the same period a year ago, to $4.2 billion. Growth has occurred across all categories of spending. **Get a closer look.**



Software

Console, portable, and PC games software **revenue grew 13% to $359M.**

PlayStation 4 software dollar sales in April 2018 set an all-time April high for any platform since tracking began in 1995.



Title Spotlight

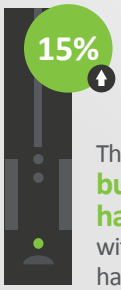


God of War was April's best-selling game.

The PS4 exclusive from Santa Monica Studios achieved the ***highest-ever launch month dollar sales*** for a title launched exclusively on a PlayStation platform.

Hardware

Hardware spending grew 15% to $225M in April.



PlayStation 4 generated the highest April unit sales for a console since Nintendo Wii in April 2009.

The PS4 Pro 1TB **Limited Edition God of War bundle was the month's best-selling hardware** item in dollar sales. The Switch 32GB with Neon Red/Blue Joy Con was the leading hardware item in unit sales.

Accessories and Game Cards

Accessories and game cards spending grew 28%, reaching $240 million.



Gamepad spending increased 7% in April 2018 compared to a year ago and is up 23 percent year to date.



Sales of headsets/headphones grew 89% in April 2018 compared to year-ago. The Xbox One Ear Force Stealth 600 Wireless Headset from Turtle Beach is the best-selling.

The NPD Group delivers monthly point-of-sale data on U.S. video games industry sales of new physical-game retail purchases and full game downloads from participating publishers on PlayStation, STEAM, and Xbox platforms.

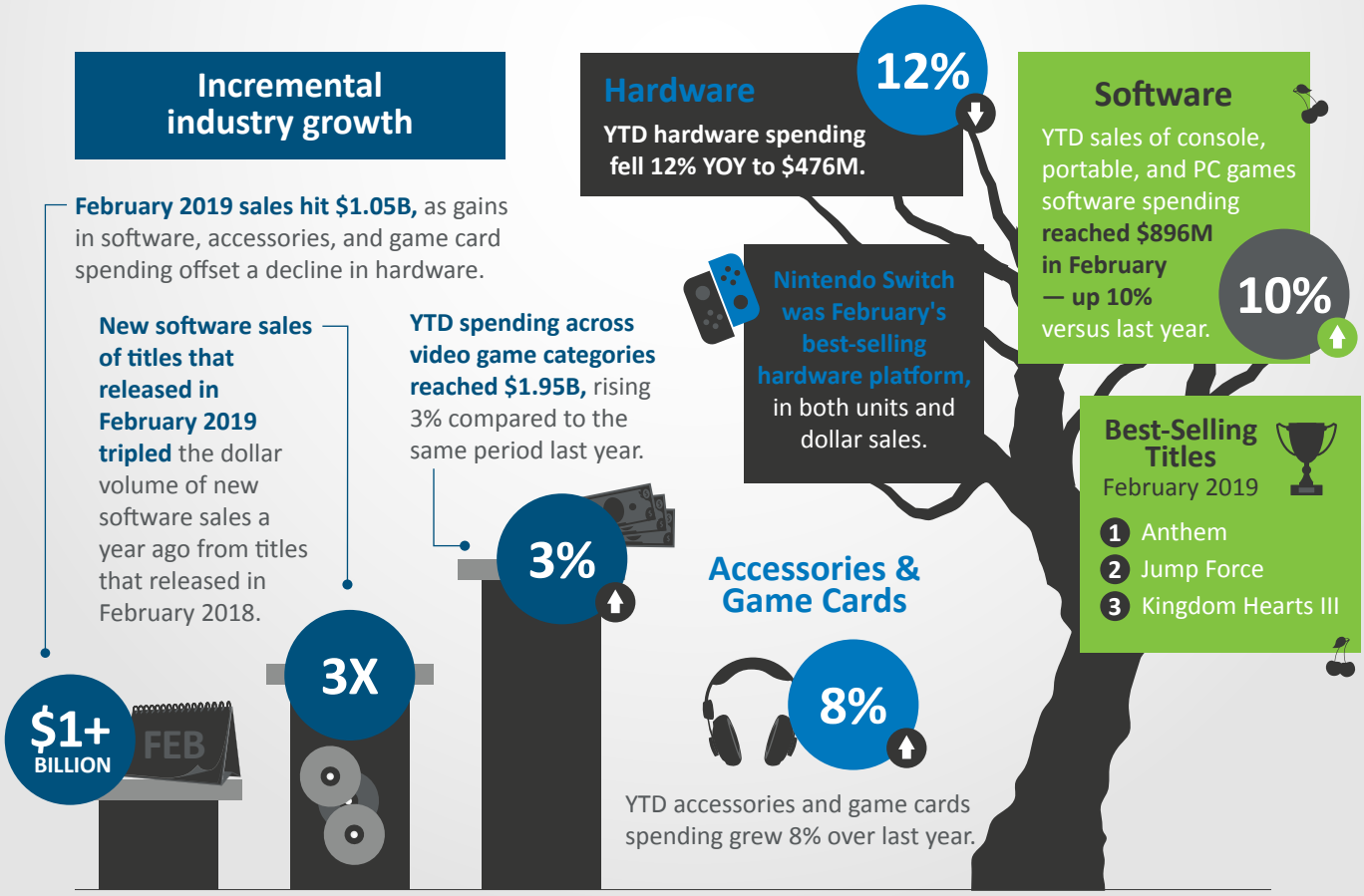
Source: The NPD Group/Games Total Physical Sales, April 2018

Want a deep dive into the God of War launch strategy?
Contact your NPD account representative, call 866-444-1411, or email cwaddell@eedar.com.

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Steady but Mixed Games Category Growth in February

February 2019 U.S. spending across video game hardware, software, accessories, and game cards grew 4%, compared to last year. PC and video games software was on the rise; video games accessories and game cards grew, too. Video games hardware faltered a bit. **Here's a closer look . . .**



The NPD Group delivers monthly point-of-sale data on U.S. video games industry sales of new physical-game retail purchases and full game downloads from participating publishers on PlayStation, STEAM, and Xbox platforms.

Source: The NPD Group/Games Total Physical Sales, YTD February 2019

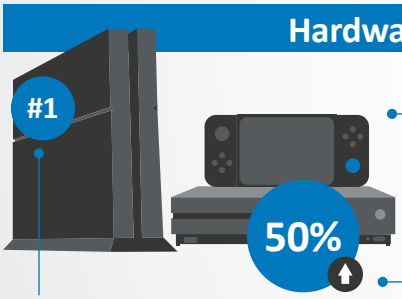
Get more insights like this. Contact your NPD account representative, call 866-444-1411, or email contactnpd@npd.com.

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Double-Digit Growth for Games Categories in July

July 2018 spending across U.S. video game hardware, software, accessories, and game cards grew 14% compared to a year ago, reaching $749 million. Year-to-date spending across video game categories was up 17% compared to the same period a year ago, to $6.8 billion. **Get a closer look.**

Hardware

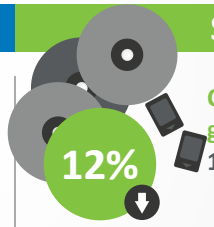


Sony's PlayStation 4 remains the best-selling console hardware platform YTD.

Unit sales of Nintendo hardware in July 2018 reached the highest point for a July month since 2009.

Xbox One dollar sales grew nearly 50% in July.

Software

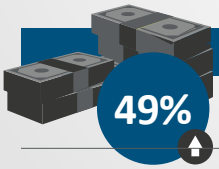


Console, portable, and PC games software revenue fell 12% in July, to $246 million.

Dollar sales of games rated by the ESRB as either Teen or Everyone have grown 22% percent YTD, to $1.2 billion.

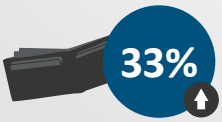


Accessories and Game Cards



Total spending on accessories and game cards grew 49%, reaching $286 million.

July success stories:



Year-to-date accessories & game card spending grew 33%, reaching $2.1 billion when compared to a year ago.



The Xbox One S White Controller was July's top revenue-generating accessory.



Gamepad and headset/headphone sales continued their record-breaking success. July 2018 reached an all-time high, besting the previous high set in July 2017 by 24%.

Source: The NPD Group/Games Total Physical Sales, July 2018

The NPD Group delivers monthly point-of-sale data on U.S. video games industry sales of new physical-game retail purchases and full game downloads from participating publishers on PlayStation, STEAM, and Xbox platforms.

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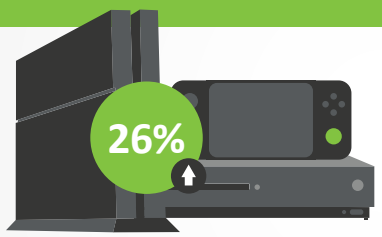
Games Momentum Builds in May

May 2018 spending across U.S. video game hardware, software, accessories, and game cards grew 13% compared to a year ago, reaching $685 million. Year-to-date spending across these video game categories was up 15% compared to the same period a year ago, to $4.9 billion. **Get a closer look.**

Hardware

Spending grew 26%, to $186M.

$186M



May success stories

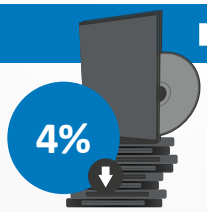
Sony's PlayStation 4, Microsoft's Xbox One, and Nintendo Switch all achieved all-time unit sales highs for a May month.



Software

Console, portable, and PC games software revenue fell 4%, to $274M.

$274M



May success stories

State of Decay 2 was the month's best-selling game.

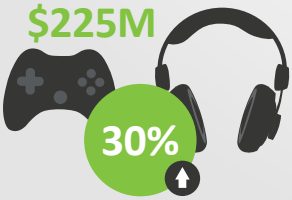


The year's best-selling titles so far include:

- God of War
- Far Cry 5
- Monster Hunter: World

Accessories and Game Cards

$225M



Spending grew 30%, reaching $225M — a record high!

May success stories

- **2X** **Sales of headsets/headphones more than doubled** compared to a year ago, and spending increased 83%.
- **#1** **Best-selling headset/headphone:** Xbox One Ear Force Recon 50x Gaming Headset from Turtle Beach.
- **#1** **Best-selling gamepad:** PS4 DualShock 4 Wireless Controller Black.

The NPD Group delivers monthly point-of-sale data on U.S. video games industry sales of new physical-game retail purchases and full game downloads from participating publishers on PlayStation, STEAM, and Xbox platforms.

Source: The NPD Group/Games Total Physical Sales, May 2018

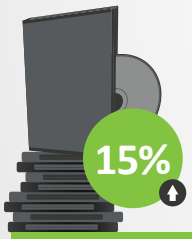
Want a deep dive into the God of War launch strategy?
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April Hardware Sales Declined, While Software and Accessories Grew

In April 2019, U.S. video game spending across hardware, software, accessories and game cards grew 1% compared to a year ago, reaching $842M. Year-to-date spending across tracked video game hardware, software, accessories, and game cards was down 2% when compared to 2018, to $4.0 billion. **Here's a closer look.**

Software



Dollar sales of tracked console, portable, and PC video game software reached $427M, up 15% compared to a year ago.

Best-Selling Games



#1 Mortal Kombat 11

Best-selling game of the month on all platforms on which it released: PC, PlayStation 4, Switch, and Xbox One.

Second best-selling game year-to-date 2019.

#2 Days Gone

Debut month sales were 7th highest in history for a Sony-published title.

#3 MLB The Show 19

10th best-selling game of 2019.

#1 sports title year-to-date.

Hardware



Hardware spending fell 29% when compared to a year ago, to $160M.

Nintendo Switch Spotlight



Best-selling hardware platform in April and year-to-date across both unit and dollar sales.

The Nintendo Switch 32GB with neon red and blue joy cons is the best-selling individual hardware item of 2019.

Accessories & Game Cards



Total spending grew 5% compared to a year ago, to $256M. Gains for both game card and gamepad spending drove overall performance.

Best-Selling



Best-selling accessory year-to-date:
PS4 DualShock 4 Black Wireless Controller

Best-selling video game accessory:
Amiibo Super Smash Bros Series 1 Character Packs

The NPD Group delivers monthly point-of-sale data on U.S. video games industry sales of new physical-game retail purchases and full game downloads from participating publishers on PlayStation, STEAM, and Xbox platforms.

Source: The NPD Group/Games Total Physical Sales, YTD April 2019

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Follow NPD's industry analyst on Twitter @MatPiscatella.

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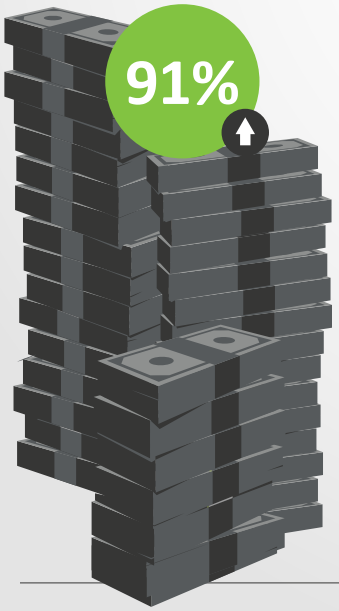
Watch Market Gears Up

The watch category registered its highest YTD sales in 3 years, with sales up 26% versus 2017. We expect the data will show a strong finish to 2018. Now there's a resource to support your business decisions in this exploding category. Our ***Watch Total Market Report*** gives you the data and insights you need, in one place, to help you grow your business. **Here's a look at some of the insights.**

Top brands lead the growth

The top 5 brands saw the largest growth in units and dollars, contributing 84% of the market's unit growth and 91% dollar growth.

Excluding these top 5 brands, the remaining market was down -1% in dollars and -6% in units.



Smartwatches are stealing share from traditional watches

The explosive growth of the smartwatch category has **closed the sales gap with traditional watches,** now a 50%/50% split.



50/50



Top 5

Fitness brands beat heritage brands

A fitness brand that expanded into the smartwatch category **surpassed a heritage watch brand that traditionally ranked in the top 5,** but now no longer does.

98%



The smartwatch market is strong

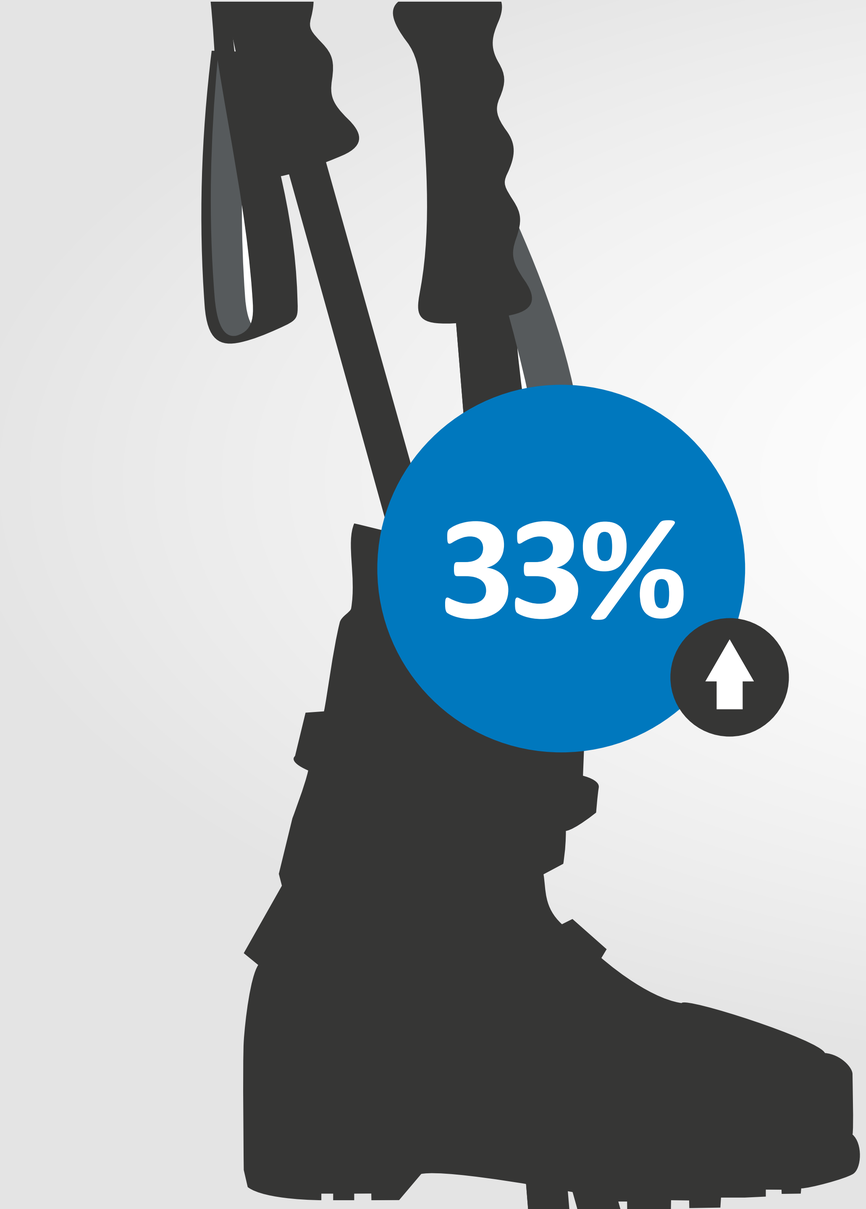
Smartwatches are fueling total watch market sales, contributing 98% to overall growth.

Get a deep and holistic market view of watch sales performance, including brand sales, category market sizing, and organic category brand growth over time. The **Watch Total Market Report** combines the best of NPD's data assets to provide the most comprehensive view of the watch market.

Source: The NPD Group/Watch Total Market Report, 12 ME Sept.2018

Get more insights like this. Contact The NPD Group at 866-444-1411 or contactnpd@npd.com.

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Kick and glide . . . Nordic equipment

sales are up 33% during the first half of the ’18 – ’19 snowsports season.

Source: The NPD Group/Snow Industry View, Aug. 2018 – Nov. 2018 vs. LY

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Women’s socks are up 12%.

4 of the top 5 brands increased sales

during the last 12 months in specialty merchants.

Source: The NPD Group/Outdoor Industry View, Outdoor Specialty and Sports Specialty E-commerce Channels, 12ME October 2018

npd



Women's jeans are up 16%

in the outdoor specialty channel.
The big names are winning.
4 of the top 5 brands
increased sales by double digits.

Source: The NPD Group/Outdoor Industry View, Outdoor Specialty and Sports Specialty E-commerce Channels, 12ME October 2018

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Jump In!
Swimwear sales were up 13%

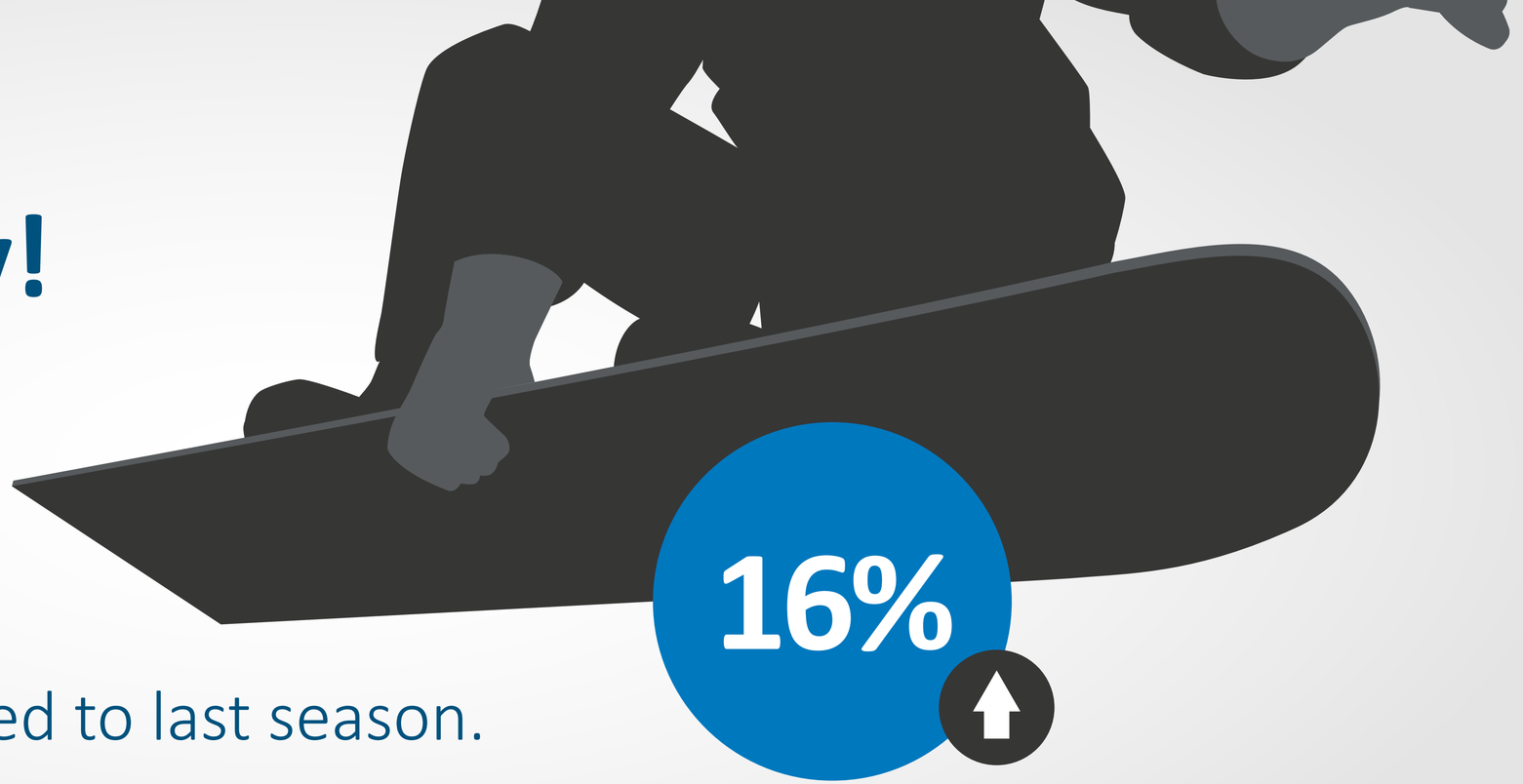
during the past 12 months.

Source: The NPD Group/Outdoor Industry View, 12ME October 2018

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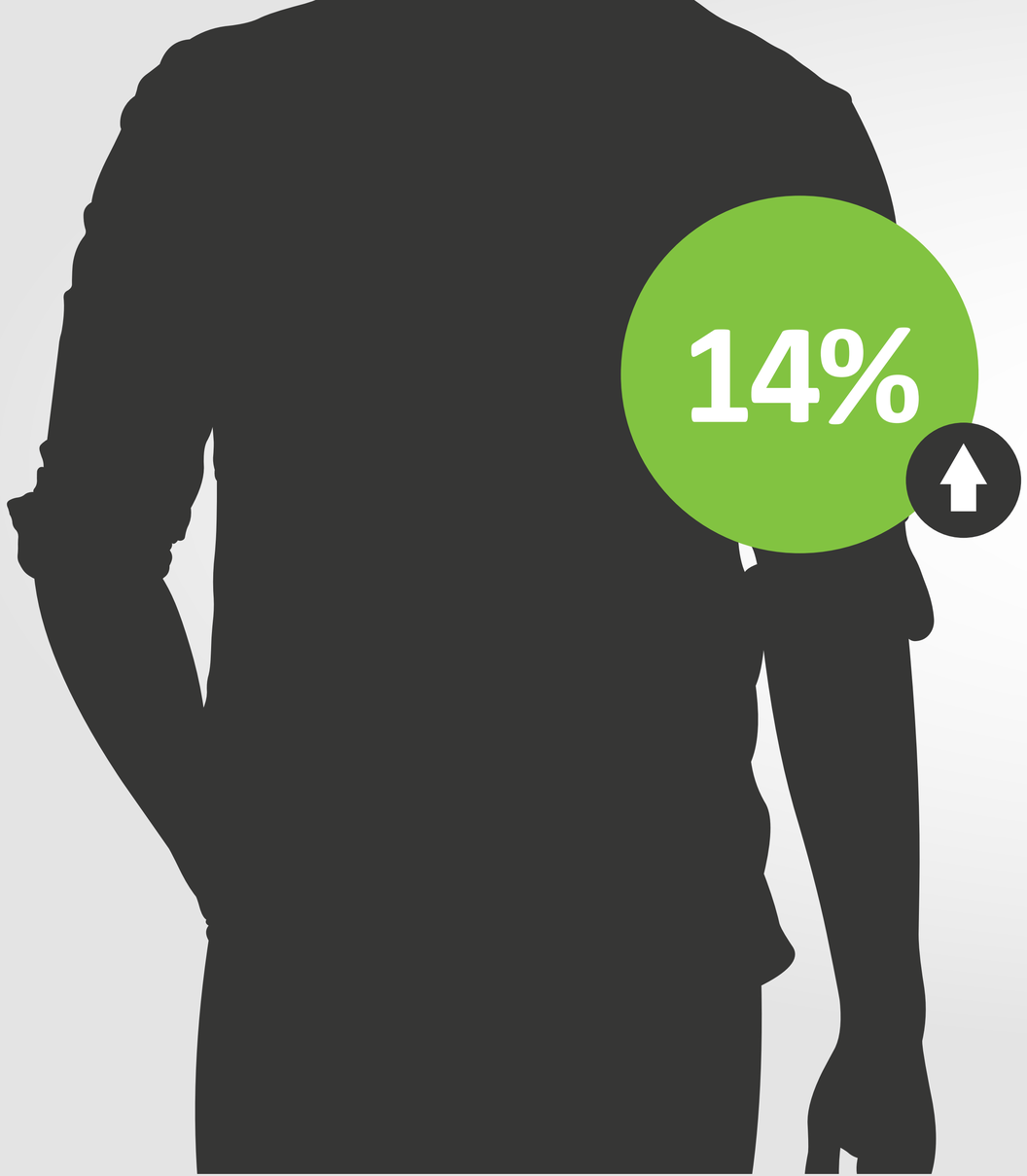
Shred ready! Sales of snowboard equipment*

are up 16% compared to last season.



*Source: The NPD Group/Snow Industry View, Aug. 2018 – Nov. 2018 vs. LY | *boots, boards, bindings*

npd



Button up!
Sales of woven shirts

sold through the outdoor specialty channel increased 14% during the past 12 months.

Source: The NPD Group/Outdoor Industry View, Outdoor Specialty and Sports Specialty E-commerce Channels, 12ME October 2018

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Keep climbing!

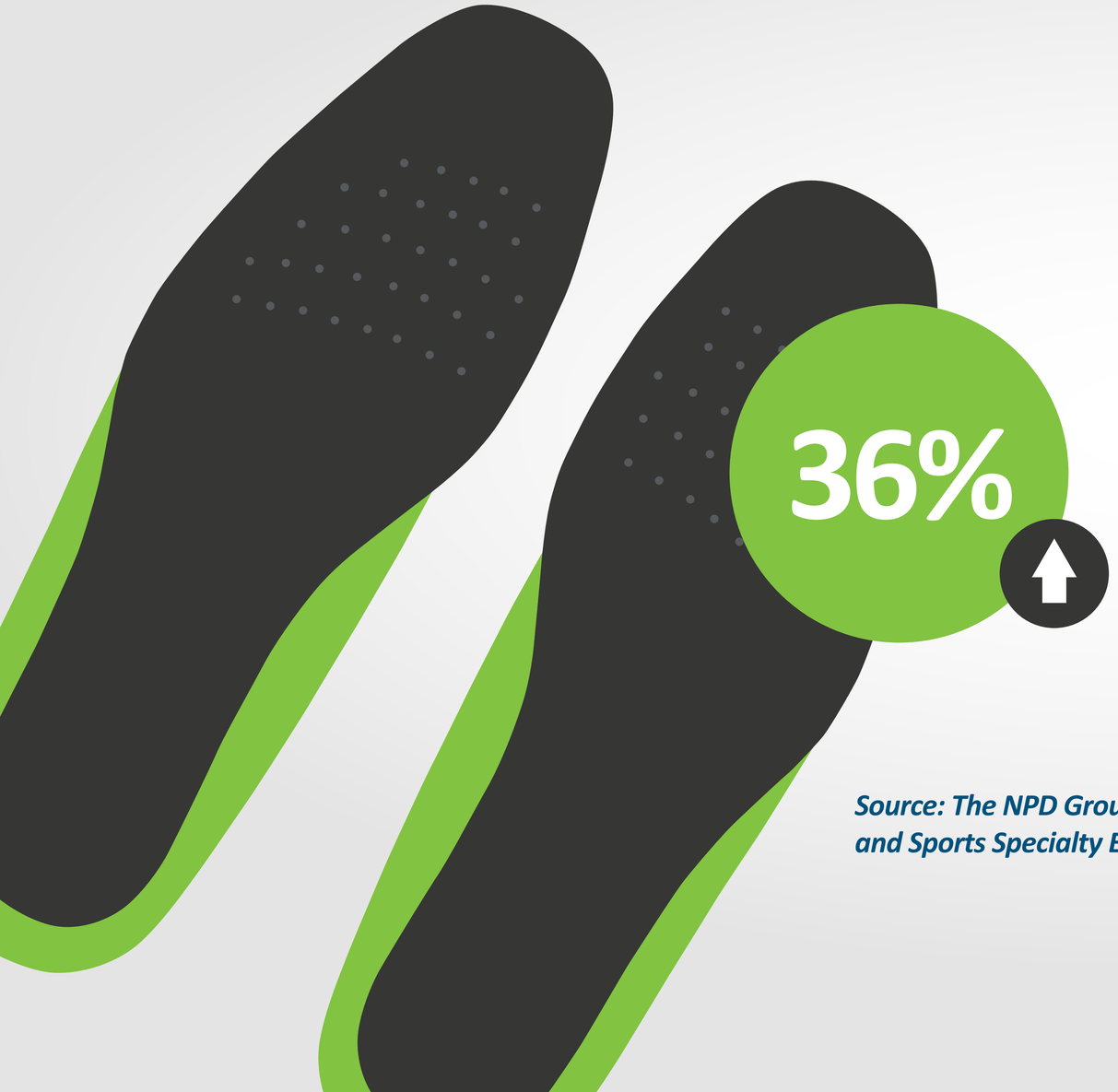
Specialty sales of women's hiking footwear

have increased 13% YOY.



Source: The NPD Group/Outdoor Industry View, Outdoor Specialty and Sports Specialty E-commerce Channels, 12ME October 2018

npd



Happy feet! Specialty sales of women's insoles

increased 36% in the last 12 months.

Source: The NPD Group/Outdoor Industry View, Outdoor Specialty and Sports Specialty E-commerce Channels, 12ME October 2018

npd



Sales of snowsports hats and gloves

are up 29% during the first half of the ’18 – ’19 season.



Source: The NPD Group/Snow Industry View, Aug. 2018 – Nov. 2018 vs. LY

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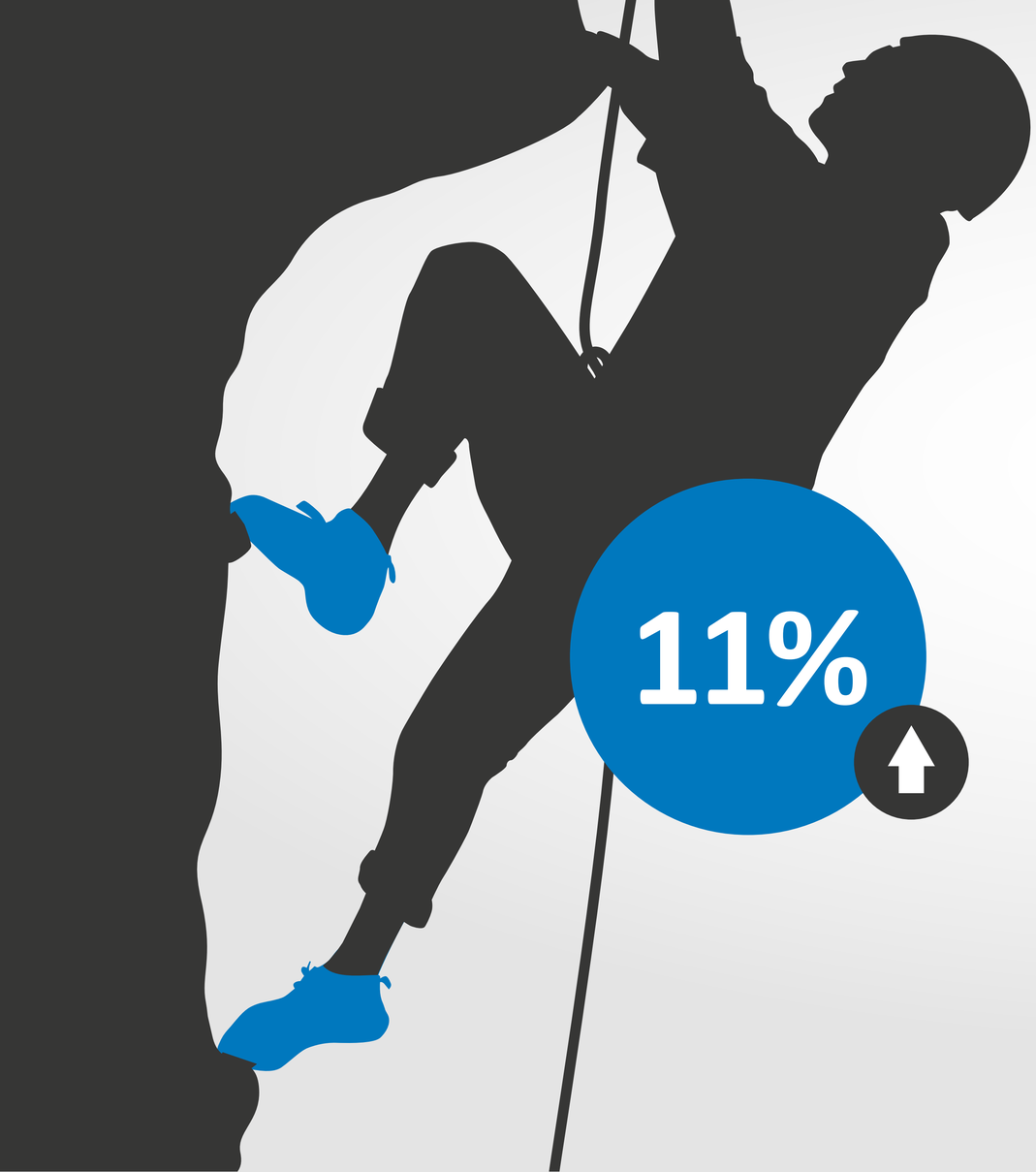


Born to run . . .

Sales of running footwear
in the outdoor specialty channel
are up 17% YOY.

Source: The NPD Group/Outdoor Industry View, Outdoor Specialty and Sports Specialty E-commerce Channels, 12ME October 2018

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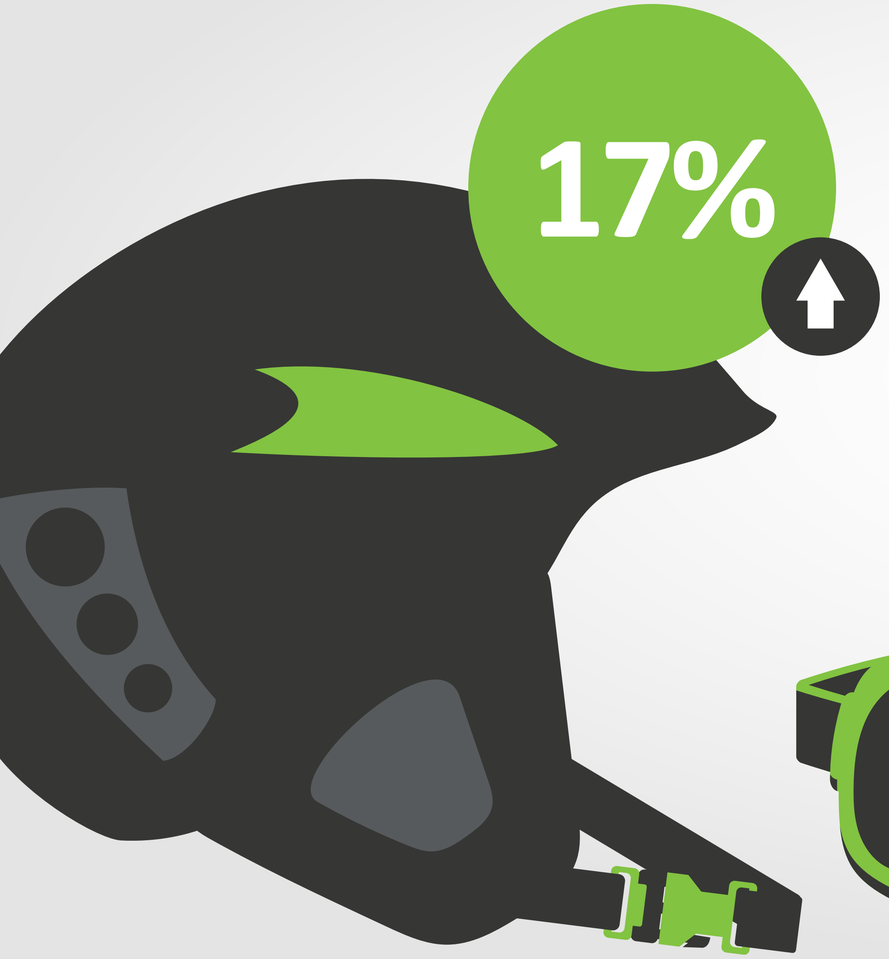


Rockin it! Youth rock climbing shoe

sales are up 11% YOY.

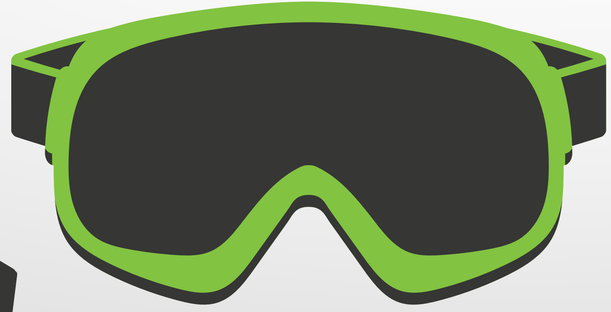
Source: The NPD Group/Outdoor Industry View, Outdoor Specialty and Sports Specialty E-commerce Channels, 12ME October 2018

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Heads up!
Sales of snowsports goggles and helmets

are up 16% compared to last season.

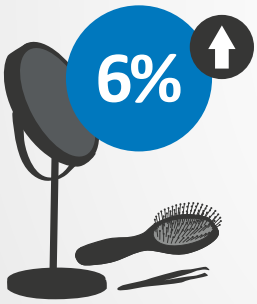


Source: The NPD Group/Snow Industry View, Aug. 2018 – Nov. 2018 vs. LY

See Inside Prestige Beauty

It's a time of change in the U.S. prestige beauty market. Women are looking to makeup as a new option for self-expression. Fragrance engagement is evolving. Skincare is trying to stabilize in a shifting retail environment. Now you can access the insider information — along with expert analyst insights — to lead the market instead of following it.

Here's a look at our latest insights:



As a whole, beauty won in 2016.

Annual 2016 total **beauty sales increased 6%** last year. Makeup led the growth with a 12% increase.



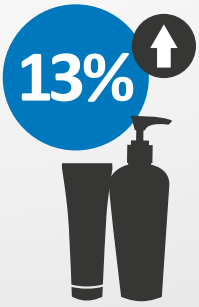
For makeup, in-store is on-trend.

The brick-and-mortar channel grew 9% in 2016, a good reminder that some consumers still prefer to try on and experience makeup products in stores.



Consumers' interaction with scent is changing.

Home scents are the fastest-growing segment in prestige fragrance, but even so, they only represent 1% of the category's sales.



Sun protection takes priority.

Sun was the strongest-growing skincare category in 2016, gaining 13% in dollars and units.

Want more insights like this? The **Beauty Insider Report** is your source for new data and insights on what the beauty industry is talking about right now.

Source: The NPD Group, Inc. / BeautyTrends®

Learn more. Call us at 866-444-1411, or email contactnpd@npd.com.

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What You Should Know About Fragrance Trends in Mexico

While makeup recorded the highest growth among prestige beauty categories in 2015 and 2016, the fragrance category is leading the market growth for YTD 2017 in Mexico. In fact, in the first five months of 2017, fragrance grew twice as fast as cosmetic categories (makeup and skincare), selling 80,000 additional units compared to last year! **Here's a look at what's driving the growth of the fragrance category in Mexico's prestige beauty market.**



A wider product offer

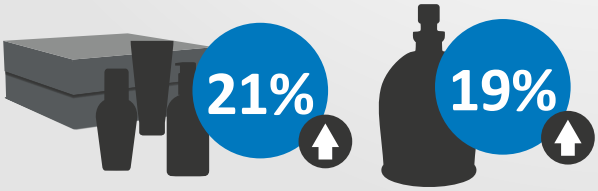
"Semi-selective" and "artisanal" brands recorded 20% unit growth:

"Semi-selective" brands are celebrities or lifestyle brands. These brands propose an **attractive selling price** to consumers (965 pesos on average).

"Artisanal" brands are exclusive brands that offer a personalized experience to consumers. They are differentiated by an **average price point 13% higher** than the rest of the market.

An attractive promotional offer

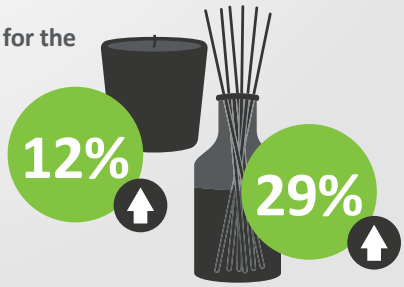
Gift sets and large formats (volume greater than 150 ml) are on the rise, registering **21% and 19% unit growth,** respectively.



New offer to perfume your house with a scent from selective market

Fragrance **isn't just for the body** anymore.

Candles (+12%) and diffusers (+29%) showed growth in units.



Know exactly what's happening in Mexico's beauty market. Discover which categories and brands are growing and declining. Pinpoint the product attributes that drive sales. The NPD Group can equip you with the data and insights you need to make critical business decisions. Get a winning advantage!

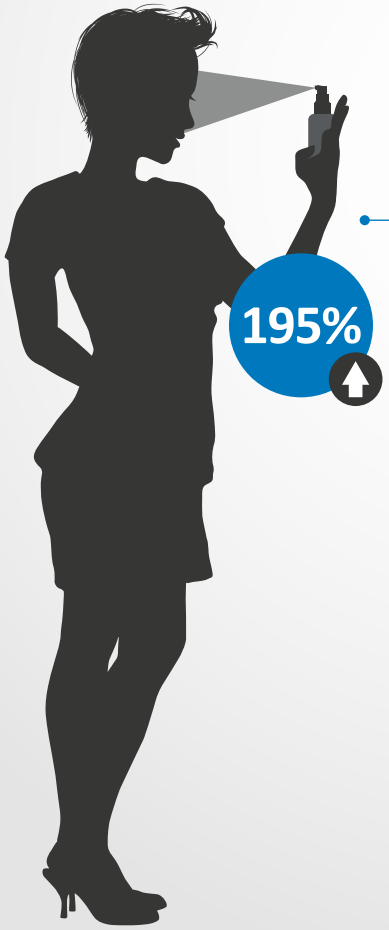
Source: The NPD Group/BeautyTrends®, YTD May 2017

Learn more about beauty trends in Mexico. Contact Samantha Grand at +52 (55) 5985 6850 or samantha.grand@npd.com.
Visit us at npdgroup.mx

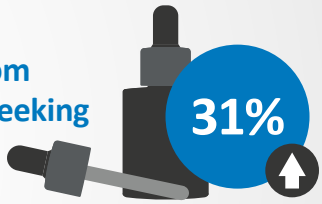
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Catching Feels

It can be tricky to keep consumers engaged these days. Attention spans are decreasing, brand loyalty is waning, and there is an expectation of instant gratification. Shopping for beauty has become experiential, and first impressions are made when consumers touch and feel the products in store. New and different textures for products have consumers feeling excited and falling in love with every purchase. **See what we see . . .**

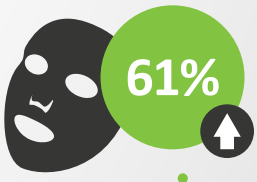


Women are turning away from heavy skincare creams and seeking lighter textures instead.



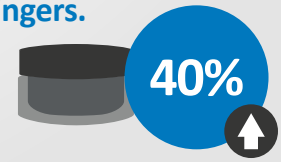
Face mists +195%
Facial moisturizing oils +31%

Single-use, disposable formats provide hydration benefits instantly and conveniently.



Eye treatment patches +47%
Sheet Masks +61%

Consumers want makeup application that requires only the touch of the fingers.



Cream eyeshadows +40%
Foundation sticks +134%

Experimentation with new textures is a trend that will continue to grow. What other categories have been positively impacted? We can help you track beauty product performance and identify new ways to grow your business as consumers continue to seek unique product experiences.

Source: The NPD Group/BeautyTrends®, 12 ME July 2017. All growth numbers show sales dollar growth vs. last year.

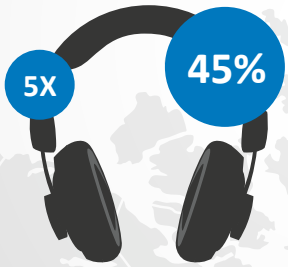
Learn more about beauty trends in Canada.
Contact Silvia Xoyon at 647-723-7765 or silvia.xoyon@npd.com.
Visit us at npdgroup.ca and on Twitter @npdcanada.

Unwrap City-Level Gift Trends for the Holidays

With city-level data and insights, you can uncover new opportunity areas, evaluate the changing competitive landscape, and refine your product offerings and marketing strategies — all in time for the holidays. **Here's a quick look at what we're seeing* . . .**

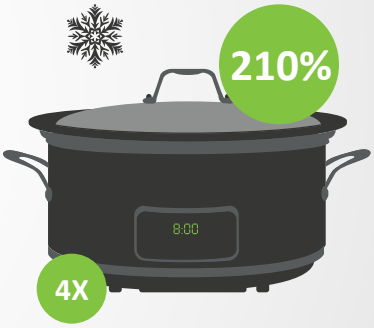
Consumer Electronics

Halifax or Saskatoon? Looking at stereo headphones, the growth rate is **5 times as high in Halifax** (+45%) as it is in Saskatoon (+9%).



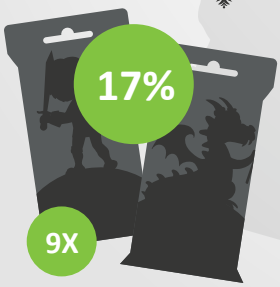
Home

Greater Toronto or Greater Montreal? For multi-cookers, the growth is **4 times faster in the Greater Toronto area** (+210%) compared to Greater Montreal (+54%).



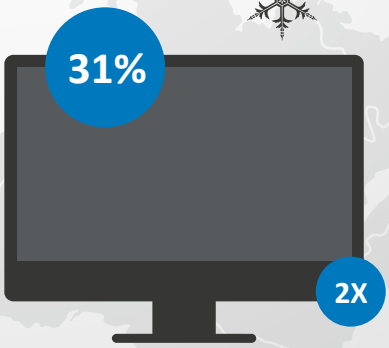
Toys

Greater Vancouver or Greater Calgary? Looking at strategic trade card games, the growth rate is nearly **9 times higher in the Greater Vancouver area** (+17%) as it is in Greater Calgary (+2%).



Information Technology

Calgary or Laval? For monitors, the growth is nearly **twice as fast in Calgary** (+31%) as it is in Laval (+16%).



See how product performance and competition differ across the country, and specifically between cities. City-level detail for Canada's technology and toy industries can make the difference for you this holiday season.

Source: The NPD Group/Retail Tracking Service, YTD September 2017 vs. last year
**All rate figures reference dollar growth.*

Learn more about technology trends in Canada. Contact The NPD Group at 866-444-1411 or email contactnpd@npd.com.

A Tale of Two Cities

With city-level data and insights, you can uncover new opportunity areas, evaluate the changing competitive landscape, and refine your product offerings and marketing strategies. **See what we see . . .**



Trois-Rivières or Quebec City?

They're less than 2 hours apart by car, but even that short distance makes a big difference. Looking at 4K TVs, the dollar growth rate is more than double in Quebec City (+52%) compared to Trois-Rivières (+20%).



Niagara Falls or Hamilton?

Separated by just a 1-hour car ride, 4K TV dollar growth is nearly twice as high in Niagara Falls (+56%) as it is in Hamilton (+30%).

You can use our city-level data and insights to pinpoint the cities in Canada that hold the most promise for your brand. It's how to adapt your strategies to local variances and outsmart your competition.

Source: The NPD Group/Retail Tracking Service

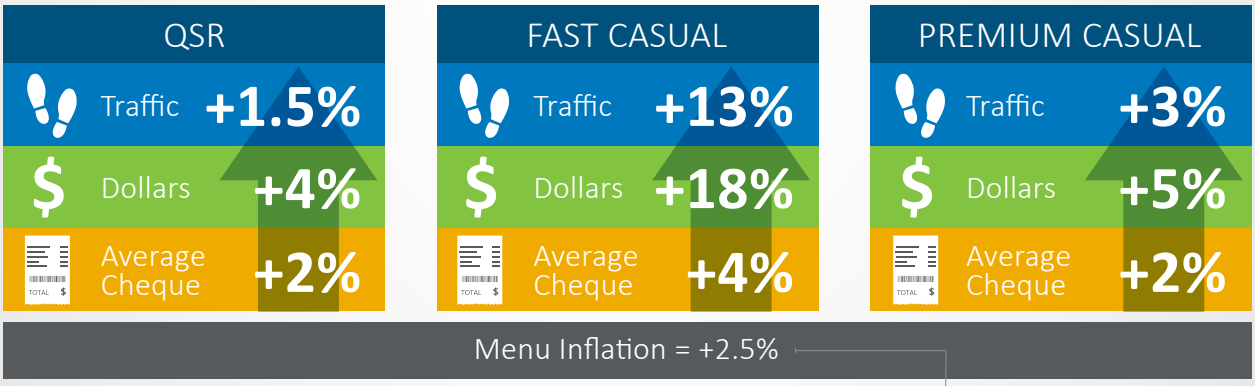
Questions? Contact your NPD account representative, call us at 866-444-1411, or email contactnpd@npd.com.

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How Are Winning Operators/Segments
Moving the Needle To Grow Sales?

In Canada's foodservice market a few segments are showing healthy sales growth. A combination of traffic and cheque gains is behind that growth. Here's a look at our latest insights on what's happening in the Canadian market.

QSR, fast casual, and premium casual are the strongest segments.



Overall growth sources from a combination of traffic gains, increased menu prices, and promotional activity (limited-time offerings, customization, shareable items, and meal combo solutions). The result has been growth in dollars.

Source: Statistics Canada, November 2016



Source: The NPD Group/CREST®, YE November 2016 vs. 2015

LOYALTY IS KING!

One common theme across these three segments is using loyalty to create growth. "I like it there" is a top visit driver across QSR, fast casual, and premium casual. Loyalty as a visit driver is showing one of the best incremental share gains vs. year ago.

There *are* winners in the Canadian foodservice market. It's all about learning best practices, discovering what's working well in the industry, and capitalizing on growth areas. Do you know what you need to know in order to build traffic and dollar growth in 2017? Behavioural insights can inspire winning branding and communications strategies — and innovation.

See what we're seeing. For more insights like this, contact Jim Harnden at 647.723.7768 or email jim.harnden@npd.com.

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A Tale of Many iPhones

Following the announcement of the highly anticipated iPhone 8 and iPhone X, the industry is eager to know which device consumers will purchase. So far, U.S. consumers are fairly divided about the best iPhone model to purchase. **See what we see . . .**

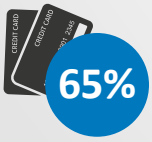


Roughly 20% of the U.S. population plans to purchase a new iPhone within the next 3 to 6 months.



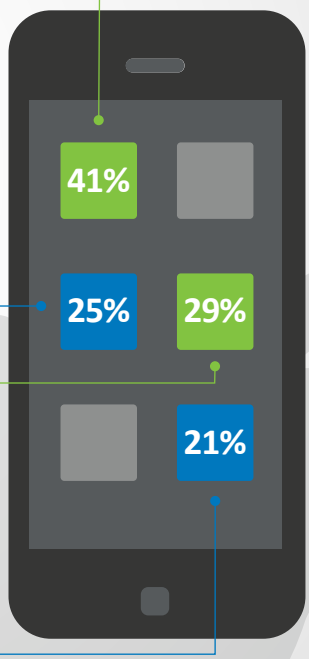
Consumers most likely to purchase the iPhone X are in higher income brackets ($100,000 – $150,000 and $150,000+).

Lower-tiered incomes ($25,000 – $50,000 and less than $25,000), **are more likely to choose the 8 or 7 model.**



65% of consumers looking to purchase an iPhone **intend to use a payment plan** rather than pay all at once.

Apple commands 41% share of the total smartphone installed base in the U.S. and far greater customer loyalty and retention rates than other devices. The Apple intender base is fairly evenly split on the device they plan to purchase.



The iPhone X and the iPhone 8 command equal interest, each claiming 25% of those planning to purchase an iPhone.

The **iPhone 7 shows slightly more interest** at 29%.

Older models remain on the list. 21% **intend to purchase a pre-7 model.**

> "This is a mixed blessing for Apple. On one hand, it does show a strong loyalty to the brand, but on the other hand, the older models are going to struggle, over time, to keep up with the demands of the latest apps and features, meaning that the consumer experience won't be as slick and smooth."

Eddie Hold
President, Connected Intelligence®, The NPD Group

Source: The NPD Group/Connected Intelligence® Mobile Broadband Survey, July – August 2017, and CivicScience survey of 2,000 U.S. adults, September 12 – 19, 2017

Get more insights like this. Contact your NPD account representative, call 866-444-1411, or email contactnpd@npd.com.

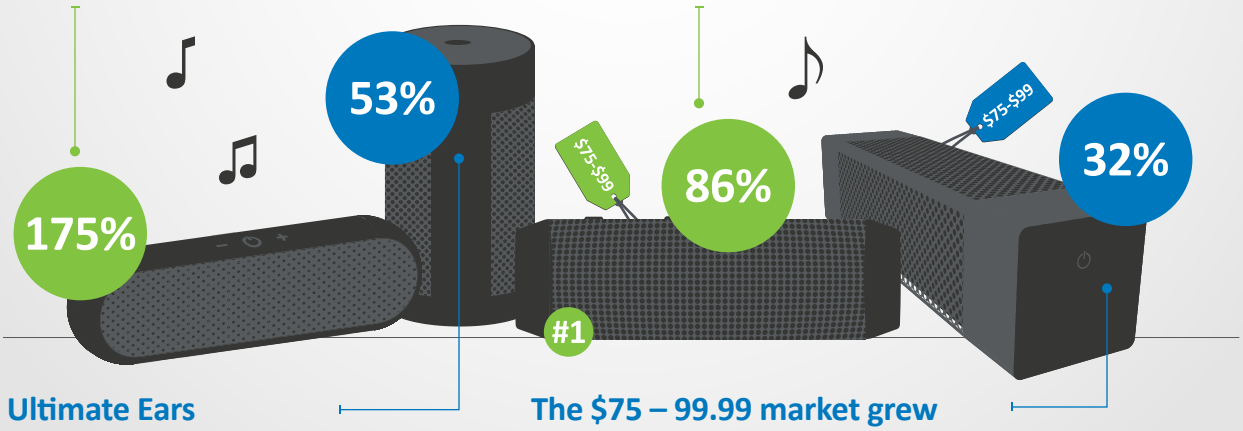
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Streaming Audio Speakers — Non Multi-Room Insights for Your CES Meetings

CES is your time to shine! You'll showcase the uniqueness of your product in important meetings. After you share all the features that set it apart, how will you get the buyers to take the next step and list your product? Access to granular data and deep expertise can help you get there. **Here's a look at our latest insights on the streaming audio speakers — non multi-room category:**

Of the top 5 brands in this price segment, **Sony grew fastest at 175% from a dollar perspective.**

Within the $75 – 99.99 segment, the top 5 vendors commanded 86% dollar share. **JBL held the number-one position.**



Ultimate Ears increased its turn rate by 53% vs. prior year.

The $75 – 99.99 market grew 32% on a unit basis vs. prior year. That's greater than overall retail sales growth of 28% for the most recent month.

The tech industry's top brands rely on our data, insights, and expertise to help them tell their story at CES. You can, too. Market share, model-level sales, detail on where your customers are buying and what else they're buying at the time of purchase, plus information on what Walmart customers are buying, and much more — it's all available to help you tell your story.

Source: The NPD Group / Store-Level Enabled Retail Tracking Service, 3ME October 2017

Want more insights like this before you head to Las Vegas?
Contact Jamie Hurst at 760.683.4371 or email jamie.hurst@npd.com.

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Bluetooth Headphones Insights for Your CES Meetings

CES is your time to shine! You'll showcase the uniqueness of your product in important meetings. After you share all the features that set it apart, how will you get the buyers to take the next step and list your product? Access to granular data and deep expertise can help you get there. **Here's a look at our latest insights on the Bluetooth headphones category:**

Within the $100 – 149.99 price segment, **the top 5 vendors commanded 90% dollar share. Beats held the number-one position with 47% share.**





Of the top 5 brands in the $100 – 149.99 price segment, **JayBird grew fastest at 195% from a dollar perspective.**



The $100 – 149.99 market declined -13% on a unit basis vs. prior year. That's lower than overall retail sales growth of 28% for the most recent month.



Bose increased its turn rate by 112% vs. prior year.

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Source: The NPD Group / Store-Level Enabled Retail Tracking Service, 3ME October 2017

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Security & Monitoring Networked Camera
Insights for Your CES Meetings

CES is your time to shine! You'll showcase the uniqueness of your product in important meetings. After you share all the features that set it apart, how will you get the buyers to take the next step and list your product? Access to granular data and deep expertise can help you get there. **Here's a look at our latest insights on the security and monitoring networked camera category:**



Within the $150 – 199.99 price segment, the top 5 vendors commanded 97% dollar share. **Nest held the number-one position with 50% share.**

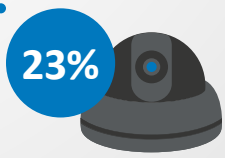


The $150 – 199.99 market grew 6% on a unit basis vs. prior year. That's lower than **overall retail sales growth of 28% for the most recent month.**



Nest decreased its turn rate by -7% vs. prior year.





Of the top 5 brands for the $150 – 199.99 price segment, **Logitech grew fastest at 23% from a dollar perspective.**

The tech industry's top brands rely on our data, insights, and expertise to help them tell their story at CES. You can, too. Market share, model-level sales, detail on where your customers are buying and what else they're buying at the time of purchase, plus information on what Walmart customers are buying, and much more – it's all available to help you tell your story.

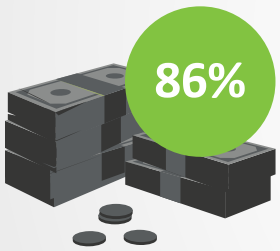
Source: The NPD Group / Store-Level Enabled Retail Tracking Service, 3ME October 2017

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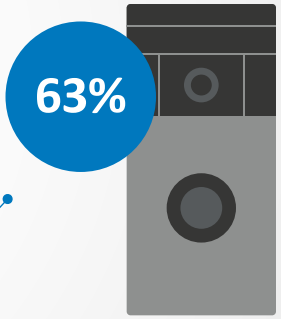
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Smart Entry Insights for Your CES Meetings

CES is your time to shine! You'll showcase the uniqueness of your product in important meetings. After you share all the features that set it apart, how will you get the buyers to take the next step and list your product? Access to granular data and deep expertise can help you get there. **Here's a look at our latest insights on the total smart entry category:**



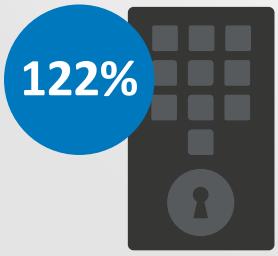
The $150 – 199.99 market grew 86% on a unit basis vs. prior year. That's greater than overall retail sales growth of 28% for the most recent month.



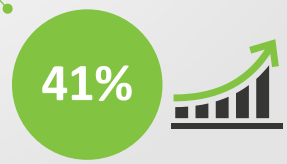
Of the top 5 brands in the $150 - 199.99 price segment, **Schlage grew fastest at 122%** vs. prior year from a dollar perspective.



Within the $150 – 199.99 price segment, the top 5 vendors commanded 95% dollar share. **Ring held the number-one position with 63% share.**



Ring increased its turn rate by 41% vs. prior year.



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Source: The NPD Group / Store-Level Enabled Retail Tracking Service, 3ME October 2017

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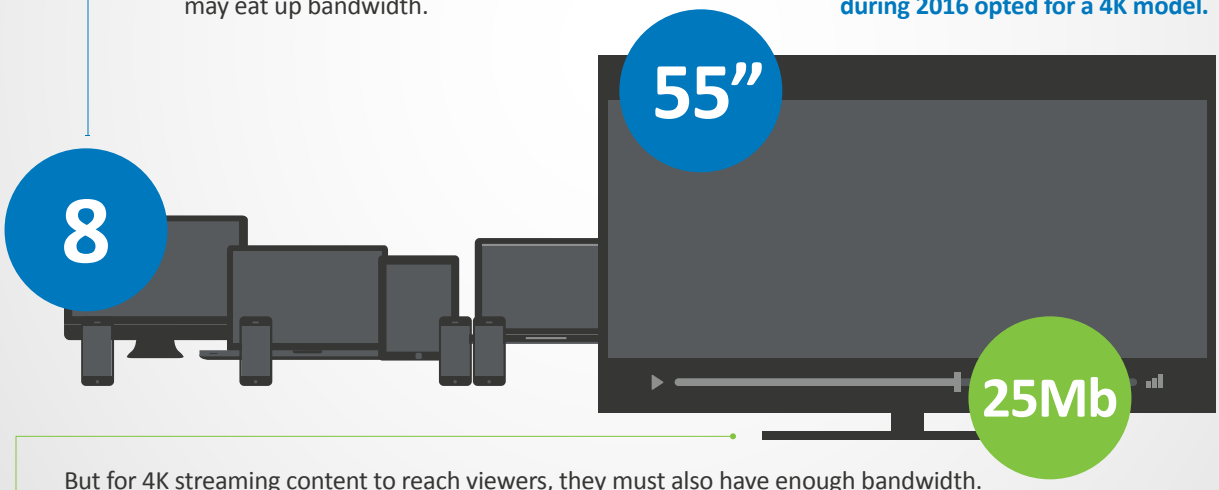
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Four Thousand Pixels
Streaming to a TV Near You

The majority of U.S. homes subscribe to a streaming service such as Netflix, Amazon Video, or Hulu. And increasingly, they have the desire — and the bandwidth — to opt for 4K TVs when it's time to make a purchase. **Here's a look at our latest insights.**

The average home has 8 connected devices that may eat up bandwidth.

A majority of consumers that **purchased a 55-inch or larger TV during 2016 opted for a 4K model.**



But for 4K streaming content to reach viewers, they must also have enough bandwidth. Generally, consumers **need a steady Internet speed of at least 25 Megabits per second (Mbps)** for 4K content streaming.

2.4M

The growth in 4K TV sales and fixed broadband speeds enabled this audience **to grow from only 2.4 million homes one year ago.**

9M

Approximately **6 in 10 4K TV homes have fast enough Internet speed** to stream 4K video — that's 9 million households.

Adoption of 4K TV is worth watching closely. Executive Director, Industry Analyst John Buffone says, "The projections for the next few years? Well, that chart looks like a hockey stick." How will you make the most of growth in this category?

Source: The NPD Group / Retail Tracking Service; NPD Connected Intelligence Connected Home Entertainment Report — January 2017

Get more insights like this. Contact your NPD account representative, call 866-444-1411, or email contactnpd@npd.com.

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Back-To-School Shopping — Not a One-Stop Occasion

The U.S. back-to-school shopping season isn't the one-stop-shopping occasion it once was. With more options for the consumer than ever before, the season has evolved. **Here's a look at our latest insights:**

Back-to-school shoppers make an average of 16 trips to purchase back-to-school related products between July and September.





During the 16 shopping visits made, **shoppers spent an average of $492** on things like apparel, footwear, office supplies, technology, sports equipment, appliances, housewares, and home textiles.



Repeat visits to the same retailer are common. During the 2016 season, back-to-school shopping trips were spread out over an average of **7 different retailers.**

Get the deepest back-to-school insights with Checkout Tracking℠. It offers transaction-level detail across all retailers, across all channels and all time, at the individual buyer level — presenting to you a hidden world of consumers' back-to-school shopping behavior.

Source: The NPD Group/Checkout Tracking℠, July – September 2016

Learn more. Contact your NPD account representative, call 866-444-1411, or email contactnpd@npd.com.

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Passenger Car Motor Oil
Purchase Journey

How do consumers make decisions about their motor oil purchases? All oil consumers are not created equal. Take a look at what our new **Quantitative Insights Report** has uncovered . . .

Over 1/2 of consumers are loyal to their oil change method. **1/2**

76% 76% of DIFM customers who switched from DIY did so 5 or more years ago.

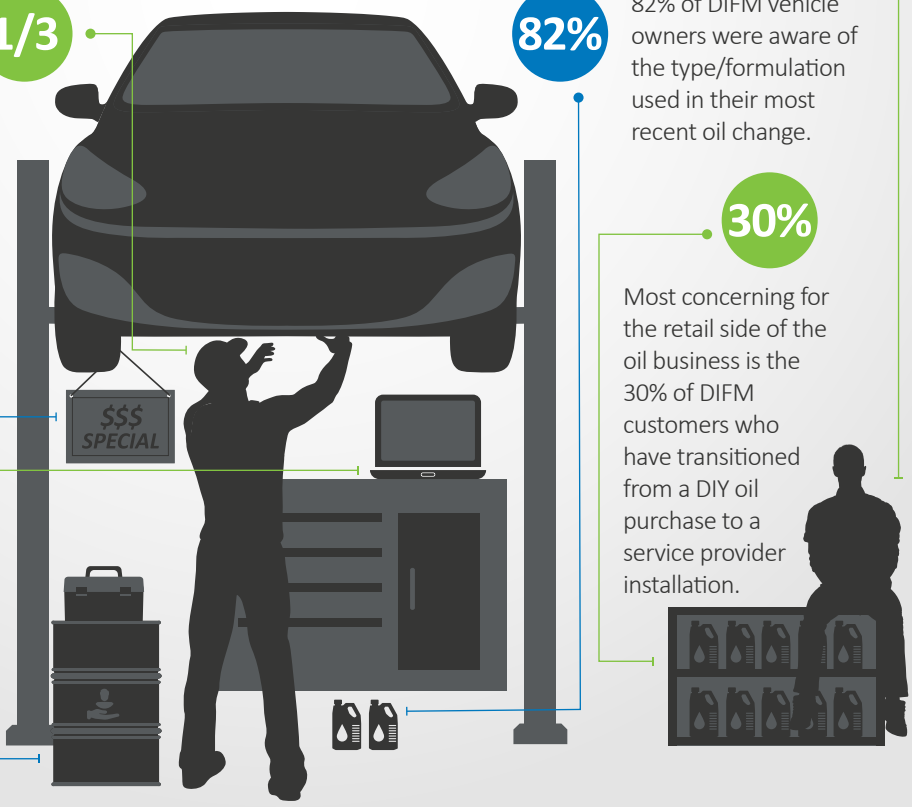
About 1/3 of do-it-yourself (DIY) consumers switch between DIY and do-it-for-me (DIFM). **1/3**

82% 82% of DIFM vehicle owners were aware of the type/formulation used in their most recent oil change.

1/3 1/3 of oil change service occasions included a special offer or coupon. More than 1/2 of those special offers were for discounts of $10 or less.

30% Most concerning for the retail side of the oil business is the 30% of DIFM customers who have transitioned from a DIY oil purchase to a service provider installation.

1/5 2 of the top 10 DIY retailers considered for most recent motor oil purchase are dot-coms.



Convenience is a key driver in the transition from DIY to DIFM oil changes. Oil disposal is also an issue for DIY oil changes, as vehicle owners do not want to deal with the hassle. How well do you know your oil consumer? Our new Quantitative Insights Report reveals deep data and new insights straight from consumers.

Source: The NPD Group/Quantitative Insights Report

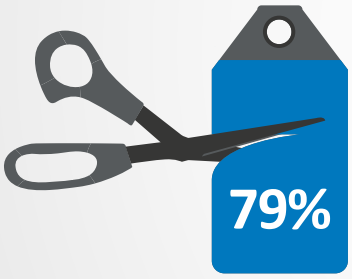
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Three Things You Need to Know About the Off-Price Shopper

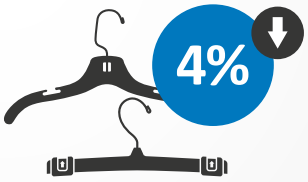
E-commerce and the off-price channel are the only U.S. retail channels seeing share growth. How can you take back share from the off-price channel?

Take a look at what we learned when we took a deep dive into purchase behavior of the off-price buyer.



1 Off-price is on trend.

Share of off-price buyers grew from 78% in 2016 to 79% in 2017.



Share of national chains and department stores declined 4% and 1% respectively over the same period of time.

2 Off-price dollar growth was driven by Millennials and Gen X.



Dollar spend per **25- to 34-year-old buyer** was $245.17, up 3% since 2016.



Dollar spend per **35- to 44-year-old buyer** was $284.61, up 7% since 2016.

3 Millennials represent an opportunity to capture spend.



Off-price **purchase frequency among Millennials** increased 4% vs. 2016.

There is a new source for data and insights to help you understand the off-price consumer. The new **Checkout Tracking℠ Off-Price Report** tells you everything you need to know. It's powered by our Checkout Tracking service, which uses millions of receipts from real people to create an incomparable trove of data based on actual buyer behaviors. The data knows everything. Now you can too.

Source: The NPD Group/Checkout Tracking℠ Off-Price Report, 12ME March 2017

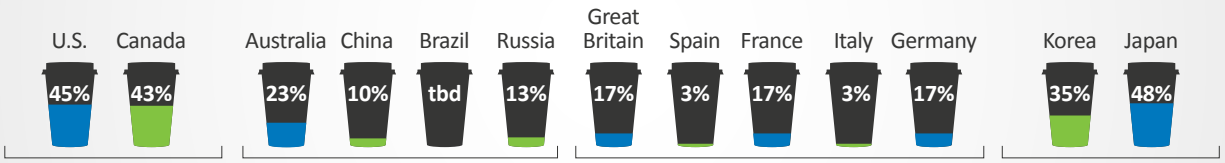
Learn more. Contact your account representative, call 866-444-1411, or email contactnpd@npd.com.

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Coffee-to-Go Goes Global

Coffee-to-go is becoming more popular around the world as international foodservice chains increasingly adapt to consumers' hectic lifestyles. Core coffee segments, such as coffee shops, and emerging segments, such as gas stations and retail, are selling coffee-to-go, boosting this category even further. We're even seeing this trend in traditional "tea countries" like Great Britain, Russia, Japan, Korea, and China, though consumption habits certainly vary. **See what we see . . .**

Coffee-to-go orders by country. Which countries are following the trend?



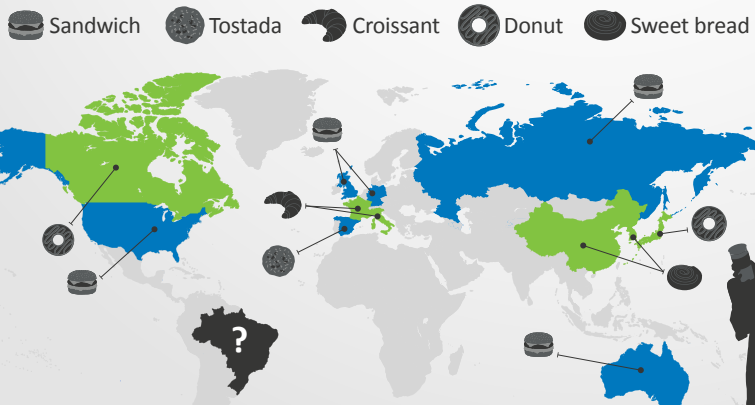
In the United States and Canada, **nearly half of all coffee orders are to-go.**

. . . while the **trend is rising** in other countries . . .

Southern European countries like Spain and Italy are **less likely to order coffee-to-go . . .**

Coffee-to-go is strong in Japan and Korea as lifestyles are becoming more westernized.

Are your target consumers sweet or savoury?



Even if the first motivation to buy coffee-to-go is convenience, buying a treat also plays an important role, especially when it comes to specialty coffee purchases.

Millennials (aged 18-34) are the core target consumers of the coffee-to-go trend, especially those in and China (56%), Russia (50%), and Korea (40%).



Millennials, who **account for 24% of Europe's population, are over represented in Europe's coffee-to-go consumption,** especially in Spain (45%), France (38%), and Germany (37%).

CREST® revealed these insights about coffee-to-go purchases around the world. What else can it tell you about what's happening in foodservice? Get robust data and deep analyst insights with **CREST** for a winning advantage.

Source: The NPD Group/CREST®, 2016

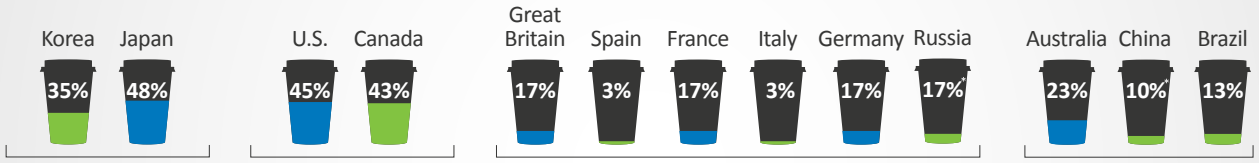
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Which countries are following the trend? Share of coffee-to-go orders in total coffee order by country.



Coffee-to-go is strong in Japan and Korea as lifestyles are becoming more westernized.

In the United States and Canada, **nearly half of all coffee orders are to-go.**

Southern European countries like Spain and Italy are **less likely to order coffee-to-go . . .**

**Russia represents 8 cities*

. . . and here's what is happening in **other countries**

**China represents 22 cities*

Are your target consumers sweet or savoury?

Product most ordered with coffee-to-go: Sandwich, Tostada, Croissant, Sweet bread/bread, Donut



CREST® revealed these insights about coffee-to-go purchases around the world. What else can it tell you about what's happening in foodservice? Get robust data and deep analyst insights with **CREST** for a winning advantage.

Source: The NPD Group/CREST®, 2016

Learn more. Contact your NPD account representative or email contactnpd@npd.com.

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What's Trending In the Diamond Industry?

The taste of the American consumer is in constant flux, and what they buy in jewelry stores reflect this. For example, there has always been a clear preference for 1 carat, round shape diamonds. However today, consumers are often looking for other shapes, such as ovals. A broad view of the retail landscape reveals these trends, which may be difficult to see otherwise. Our ***Diamond Tracker*** service is the only source that can tell you how costs and prices are changing, what consumers are truly buying, and how changes in inventory impact availability.

Our *Diamond Tracker* revealed . . .

82% The number of **oval shape diamonds** sold in March grew 82% year-over-year.

54% The number of **heart shape diamonds** sold in March fell 54% year-over-year.

6% The number of **round diamonds** sold declined 6% during the same period.

7% Retailer inventory levels of **1 carat diamonds** softened 7% in March 2017 compared to March 2016.

1.8+ Retailers did stock up on **1.80-1.89 carats** (up 9%) and 0.30-0.39 carat (+7%).

$3.6K Retailers paid on average $3,604 per carat for **loose rounds** during March, up 4% year-over-year.



Start seeing what others cannot. Go to the source that provides in-depth industry insights. The NPD Group can help you grow your business and get a winning advantage.

Source: The NPD Group/Diamond Tracker, March 2017 vs. March 2016

Learn more. Contact mary.galeski@npd.com or desiree.hanson@npd.com for more information.

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Winning Customers in Video Entertainment

Your audience is everywhere — in every room, on every device, on every platform. Whether streaming or downloading, buying or renting, in the theater or on the couch, big screen or phone screen, your customers are consuming entertainment everywhere, all the time. That means there's a lot of competition for their attention and dollars.
See what we see . . .

Almost half of consumers stream movies or watch TV by subscription, as SVOD continues to rise.

50%

Nearly half of SVOD subscribers use multiple services, like Hulu, Netflix, HBO Now, and others.

50%



1/3 +

1/3 of consumers **use both physical and digital video.**



U.S. consumers (ages 13 and older) **spend an average of 17.5 hours per week watching movies and TV content** — that's 1 more hour than last year.



New hardware helps drive **increased video disc sales.**



Top reasons for buying more discs:
1. Price was right
2. New player/system/computer

The NPD Group's ***Entertainment Trends in America*** is a semi-annual report showing you the latest consumer behavior and trends across video, music, and video games. Gain new clarity on the myriad entertainment options competing for consumers' time, attention, and wallet share.

Source: The NPD Group / Entertainment Trends in America, 12 months ending August 2017

Get more insights like this. Contact your NPD account representative, call 866-444-1411, or email contactnpd@npd.com.

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At-Home Food Prep — Convenience is King

Fresh foods are growing after decades of consumers shifting to "convenient" packaged and processed solutions. As the desire for more fresh options in U.S. kitchens has grown, the definition of convenience has shifted. **See what we see . . .**

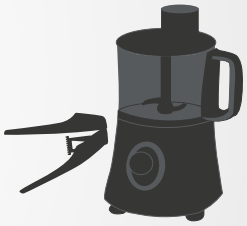
Older consumers likely always will eat more fresh foods than younger consumers do, but Millennial women and Gen Z are driving gradual change.



Millennial women (18-34) increased "fresh" eatings per capita by 5% over the past 5 years. Children 17 and under (Gen Z) increased 6%.

Gadgets and tools make fresh food prep easier.

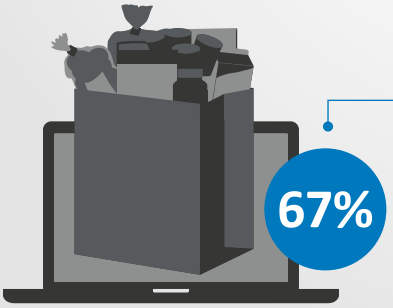
Kitchen gadgets and tools that facilitate cooking and cleaning up are on the rise. What's growing? Measuring spoons, splatter screens, garlic preparers, and choppers.





The effect of convenience on food prep time.

6 out of 10 U.S. adults spend less than 30 minutes preparing dinner — even with the addition of fresher options.



Grocery e-commerce saves time and effort, too.

Convenience tops the list of reasons people like shopping online for groceries (67 percent), followed by delivery options (59 percent), and item descriptions (59 percent).

For 1 in 3 consumers, the **convenience of shopping from home is a top benefit.**



The NPD Group's annual report on ***Eating Patterns in America*** is the definitive source for detailed information on eating and drinking habits in the United States. Get in-depth insight on actual consumption behavior and find out how that behavior is changing over time.

Source: The NPD Group/Eating Patterns in America, 32nd Edition, 2017

Learn more. Contact your NPD account representative, call 866-444-1411, or email contactnpd@npd.com.

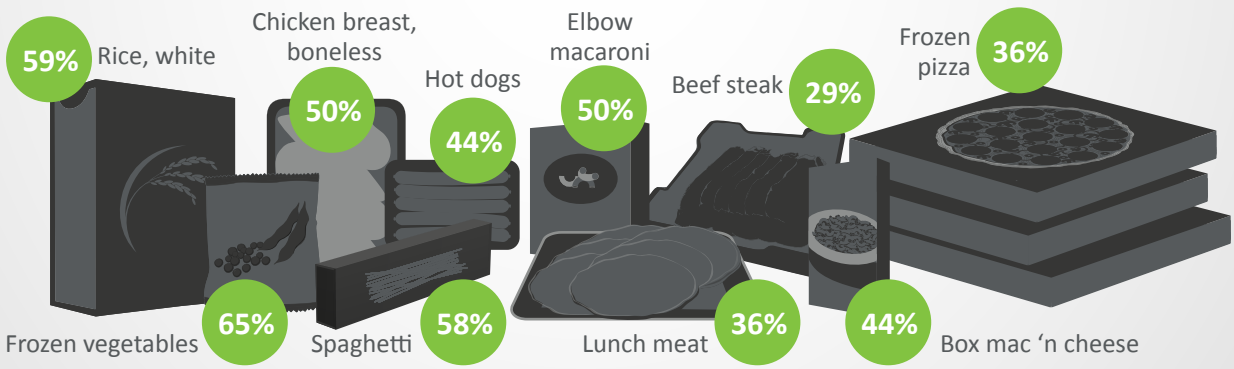
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What's for Dinner? Most Likely a Pantry Staple.

For about one in three (34%) dinner decision-makers in the U.S., what they have on hand is the top motivation for deciding what to do for dinner. Do you know the items they have on hand in their kitchens now, usually, sometimes, and never? The dinner-oriented items on hand represent "go-to" solutions when evening rolls around for many meal preparers. **Is your category a kitchen staple?**

Shopping the Pantry for Dinner — What Meal Preparers Have on Hand

% of meal preparers who have these dinner-oriented items on hand

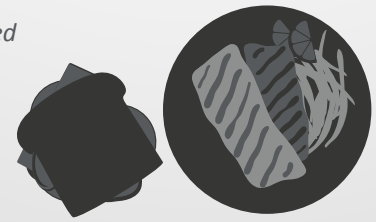


What's served for dinner?

It's no surprise that the top dinner entrees align with the top items on hand in the kitchen.

Top main dish-oriented foods consumed for in-home dinner:

1. Sandwich
2. Chicken entrée
3. Italian/pasta dish
4. Pizza
5. Beef entrée



When shopping the pantry for dinner, the top motivation for what dinner-planners choose to serve, other than being driven by what's on hand, is serving **something quick and easy. "It didn't cost a lot"** is next on the list of motivations.

What's the opportunity? Encourage consumers to think about pantry-loading. Share ideas about how they can use up pantry staples. Consider developing meal ideas that incorporate your product as well as other common staples to create a complete meal. Our **Kitchen Audit service** can help.

Source: The NPD Group/Kitchen Audit 2017, National Eating Trends®, Path to Consumption®

Want more insights like this? Contact your NPD account representative, call 866-444-1411, or email contactnpd@npd.com.

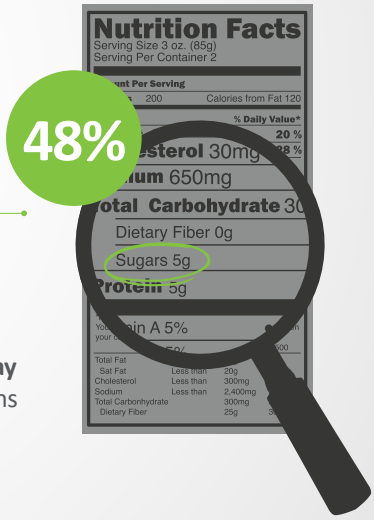
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Sweet Smarts: Consumers' Concerns About Sugar

Over the last decade, U.S. consumers became less concerned about checking nutrition labels for calories, fat, and sodium. But sugar held steady until an uptick in 2016 and 2017. Now it's their number-one priority when checking labels. **See what we see . . .**

48% of U.S. adults look for sugar on nutrition labels, up 6 points from a decade ago.

By comparison, the percent checking for total **calories, total fat, sodium, and serving size has decreased during this time.**





53%

53% of teens and adults say they're trying to get less sugar in their diet.

While **older adults (Boomers +) are most likely to say they're trying to get less sugar,** almost all generations voice concern at fairly average levels. The degree to which consumers act on this concern varies by generation, however.

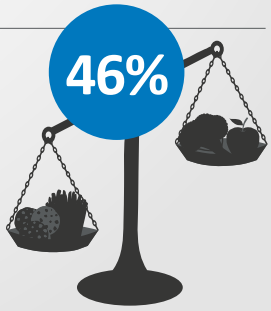
Consumers also want their sweets to be more natural.

Adults' intentions to consume products containing artificial sweeteners have declined over time.



Consumers may talk the talk, but walking the walk is harder!

46% of teens and adults who say they're cutting back on sugar acknowledge they know how to eat well, they just don't do it!



Only The NPD Group reveals what consumers say, not just what they do. Discover which foods and beverages are most affected by concerns about sugar and how this varies by generation. The new report, **Impact of Sugar Concerns on Consumption Behavior,** gives you a winning advantage.

Source: The NPD Group/National Eating Trends®, 2 YE May 2017 and Dieting Monitor, YE June 2017

Get more insights like this. Contact your NPD account representative, call 866-444-1411, or email contactnpd@npd.com.

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Grocery E-commerce in the Amazon Age

Rapidly shifting U.S. food and beverage shopping habits have many companies searching for ways to make the most of the evolving grocery market, and grocery e-commerce is naturally getting a lot of attention. Amazon's recent acquisition of Whole Foods will surely be a game-changer from a distribution perspective, but it also has the potential to overcome a top barrier among consumers who haven't started buying groceries online. **See what we're seeing . . .**

52% of online grocery shoppers **have an Amazon Prime membership,** compared to 24% of those who have not tried online grocery shopping.

52%

67% of those who haven't shopped for groceries online say it's because **they want to choose fresh items themselves.**

67%

Yet 81% of those who've never tried online grocery shopping **have no problem shopping online for apparel, books, and other products.**

81%

And online food shopping is not exclusive – 97% of online grocery shoppers **also shop in physical grocery stores** in a typical month.

97%



With more shoppers ordering groceries online every day, and with competition on the rise, you need reliable consumer and market insight so you can take action now and plan ahead. Our report, ***The Virtual Grocery Store,*** shows you why and where consumers shop for groceries. It's the information you need to make effective, data-driven decisions.

Source: The NPD Group/The Virtual Grocery Store

Learn more. Contact your NPD account representative, call 866-444-1411, or email contactnpd@npd.com.

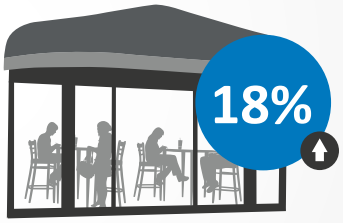
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The Perils of Chicken Wing Pricing

Chicken wing pricing has been like a roller coaster ride. Prices skyrocketed, compelling restaurant operators to promote boneless wings. Then they plummeted to lows not seen since 2004, giving operators the ability to renew their focus on bone-in wings. Will operators continue to promote the highly profitable boneless version? If so, just how acceptable will these strategies be to the purchasers of chicken wings, both bone-in and boneless? **See what we see . . .**



Baby Boomers are very inclined to buy wings at FSR. Nearly 50% of bone-in wings buyers are 45+ years old.

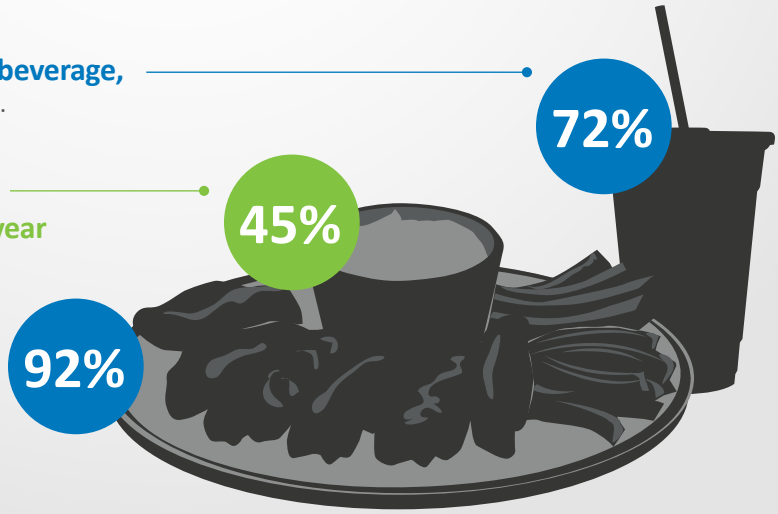


The number of restaurants with the word "wings" in their names has grown 18% since 2014.

72% of FSR wings orders include a beverage, compared to just 26% of QSR wings orders.

45% of U.S. consumers purchased chicken wings at a restaurant this year — up from 43% last year.

92% of wing purchases at casual dining and pizza are purchased à la carte.



Make pricing, menu, and marketing decisions with confidence in the midst of wings-market upheaval. The new ***Chicken Wing Dilemma Report*** explores how potential bone-in wing price increases affect consumer-purchasing behavior.

Source: The NPD Group / Checkout / Chicken Wing Dilemma Report, 2017

Get more insights like this. Contact your NPD account representative, call 866-444-1411, or email contactnpd@npd.com.

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Winning With Double-Digit Spending and Sales Growth

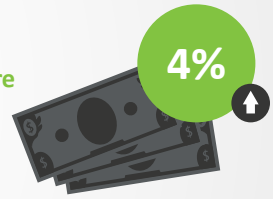
In December 2017, U.S. video game spending across hardware, software, and accessories grew 10% compared to year-ago, reaching $3.3 billion. For the year, U.S. sales of video game spending across hardware, software, and accessories reached $14.6 billion, up 11% over 2016. **Here's a look at some of what we saw in December . . .**



Software

Dollar sales of console, portable, and PC games software together reached $1.3 billion in December 2017.

Total 2017 consumer spending on software was up 4% to $6.7 billion.



Title Spotlight:



Call of Duty: WWII was the best-selling game in December and for the year.



Highest growth among all super genres in 2017? **Racing games**.

Most overall consumer spend? **Shooter games**.

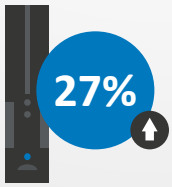


314 titles received new packaged releases at retail in 2017, up 16% compared to 2016, and 36% higher than in 2015.



Hardware

December hardware spending grew 27% compared to year-ago, reaching $1.3 billion. For full-year 2017, hardware spending increased 28%, to $4.7 billion.

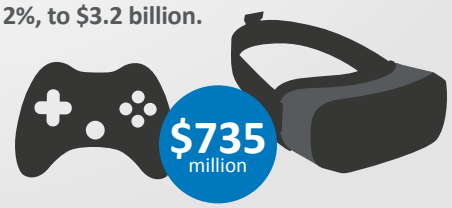




Nintendo Switch was the best-selling hardware platform in the month of December. Sony's PlayStation 4 was the best-selling hardware platform of 2017.

Accessories

Total spend on accessories and gamecards was flat in December compared to year-ago, to $735 million. Total 2017 spending for accessories and gamecards grew 2%, to $3.2 billion.



Source: The NPD Group/Games Total Physical Sales, December 2017
The NPD Group delivers monthly point-of-sale data on U.S. video games industry sales occurring from new physical purchases at retail and full-game downloads from participating publishers on PlayStation, STEAM, and Xbox platforms.

Get more insights like this. Contact your NPD account representative, call 866-444-1411, or email contactnpd@npd.com.

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March Came In — and Left — Like a Lion for Games Spending!

March was a stellar month for total video game spending growth in the U.S., which includes hardware, software, and accessories. That growth had everything to do with the Nintendo Switch release and new titles like Tom Clancy's Ghost Recon: Wildlands, The Legend of Zelda: Breath Of The Wild, Horizon Zero Dawn, and Mass Effect: Andromeda. **See what we see . . .**

24% $

Spending grew by **24% compared to last year,** to over $1.3 billion.



Nintendo Switch packaged software sold 1.3 million units, a record high for a Nintendo platform launch.

54%



Zelda is the top-selling property of all time in the adventure super genre, with 54% more revenue than the next best-selling franchise, **Resident Evil.**

900K

The Switch version of **The Legend of Zelda: Breath of the Wild** was the second-best game in March, selling over 900,000 packaged units in the launch month.

99%

This resulted in an **attach rate of 99%** for the Switch hardware.



1-2 Switch made the list of Top 20 Best-Selling Games; coming in at #13.

Best-selling titles in March 2017



Tom Clancy's Ghost Recon: Wildlands was the best-selling title in March 2017.



Mass Effect: Andromeda ranked third for the month.



Horizon Zero Dawn was the fourth best-selling title in March.

In March, hardware spending almost doubled compared to a year ago. And total spend on accessories and gamecards grew 9% compared to last year. Will the industry maintain this momentum through the spring, even after the buzz about new releases dies down a bit? Our analysts are watching closely, so stay tuned.

Source: The NPD Group/Games Total Physical Sales, March 2017

Get more insights like this. Contact your NPD account representative, call 866-444-1411, or email contactnpd@npd.com.

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Navigating GMO Concerns

Concerns about genetically modified organisms (GMOs) in food are on the rise in the U.S., and it's affecting the foods people eat and purchase. A major new labeling law is set to take effect in 2018, which means it's critical to understand how consumers view GMOs so you can gauge the risks for your business and respond to potential opportunities.

Here's what our latest information is telling us:

19%

19% of U.S. consumers regularly look for GMOs' presence in their foods and beverages, compared to 11% in 2013.

Organic and non-GMO foods are the fastest-growing special labels on product packaging.

34%

More than one-third (34%) of consumers between ages 18 to 34 are aware and concerned about GMOs, compared to just 25% in 2013.

Consumers say **corn, vegetables, meat, poultry, and milk** are foods that include GMOs.

11%

Of the **11% who are aware of the new federal law passed in 2016,** just 48% are aware of the law's specifics about GMOs.

It's not just about foods purchased at grocery stores – **Millennials are more likely to have GMOs on their minds when dining away from home,** compared to other age groups.

Consumers are shifting to social media and reading labels to get information on GMOs. While TV is still tops, finding GMO information via social media and food labels is rising fast.



It takes a unique blend of information about consumer intentions and buying behaviors to reveal how consumers are reacting to concerns about GMOs over time. Make data-driven decisions with the new report, **Navigating GMOs for Success.**

Source: The NPD Group/Navigating GMOs for Success, 2016

Learn more. Contact your NPD account representative, call 866-444-1411, or email contactnpd@npd.com.

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Was sind die Faktoren für Quick-Service Wachstum in Deutschland?

Deutschlands Schnellgastronomie (QSR) verändert sich rapide. Interessante neue Konzepte und Trends entstehen in diesem Marktsegment, was immer mehr Konsumenten anlockt und das Wachstum antreibt. **Dazu die neuesten Insights aus dem Konsumentenpanel CREST®:**

38%

38% aller Gastronomie-Besuche im Jahr 2016 fanden in der Schnellgastronomie statt und die Konsumausgaben wuchsen hier **fast doppelt so schnell** als in der klassischen Bediengastronomie.

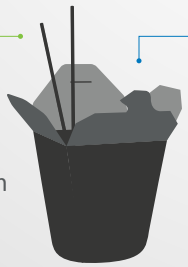


1/3

QSR hat einen Marktanteil von beinahe **einem Drittel** des gesamten Außer-Haus-Marktes in Deutschland

60%

Der Durchschnittsbon bei Lieferdiensten ist um **60% höher** als im gesamten QSR-Segment



60%

Lieferdienste, Bäckereien, Ethno-Schnellimbisse und Burger-Restaurants generieren **60% des Umsatzes** im Segment. Metzger und klassische Imbisse verlieren jedoch Kunden



Die Verbraucher wollen mehr. Es geht nicht nur um "schnell" oder "einen guten Preis" – ein großer Teil der QSR-Kunden wollen etwas **"leichtes oder gesundes"** essen.

Das QSR-Segment bietet eine breite Palette neuer Umsatzchancen für Ihr Unternehmen. Bei der npdgroup deutschland GmbH können wir Ihnen dabei helfen, faktenbasierte Entscheidungen über Investitionen in diesem Markt zu treffen oder Ihr Geschäftsmodell zu optimieren. Der neue **Quick Service Report 2017** liefert Ihnen aktuelle Daten, Analysen und Insights über Marktgrößen, Konsumentenverhalten und Trends.

Quelle: npdgroup deutschland GmbH/CREST®, MAT März 2017 vs. 2016

Haben Sie weitere Fragen? Dann wenden Sie sich an:
Alexander Michalik, alexander.michalik@npd.com,
Tel.: +49 911 8918 0, Mobil: +49 151 197753 52

npd group deutschland GmbH

How Well Do You Know Your Customers?

Longitudinal data from ***Checkout Diagnostics*** provides all-new insights into how U.S. shoppers behave over time. **Here's how longitudinal data for individual consumers leads to category insights . . .**



Meet Kim

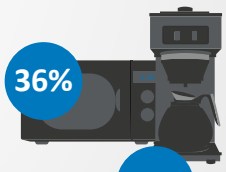
Location: California | **Household Size:** 2 | **Salary:** $50,000 – $74,000

Based on her receipts, we know . . .

1/2

Similar to other female buyers, Kim **made over half of her brick-and-mortar housewares purchases at a single retailer.** But when it comes to dinnerware, half of her purchases were split between two retailers.





36% of Kim's **purchases were appliances.**

36%

5% of her **purchases were for the home and kitchen.**

5%

$10

Kim **spends approximately $10 on dinnerware per purchase,** similar to male buyers her age.

So how do Kim's housewares purchases compare to those of male buyers?

When dinnerware is included in the basket, Kim spends approximately $65. By comparison, **males spend approximately $10 more overall than females do when dinnerware is included in the basket.**



+$10



The same is true for flatware purchases — **males spend slightly more than women when flatware is included** ($66 vs. $65).



Males also spend $13 more than females when boxed sets are included in the basket.

NPD's **Checkout Tracking**℠ uses millions of receipts from real people to create an incomparable trove of data based on actual shopper behaviors at thousands of retail locations, both online and in-store. In ways that point-of-sale data cannot, Checkout Tracking allows you explore consumer's share of wallet, cross purchasing, market basket, and demographic comparisons.

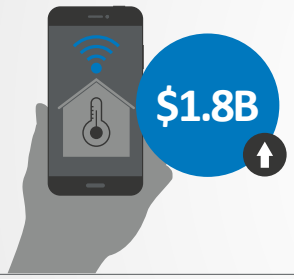
Source: The NPD Group/Checkout Diagnostics, 12 ME July 2017

Learn more. Contact your NPD account representative, call 866-444-1411, or email contactnpd@npd.com.

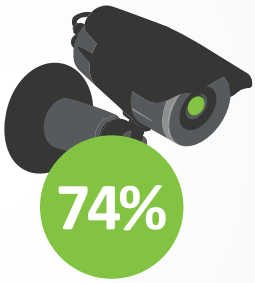
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Home Automation Products Soon Will Top $1B in U.S. Sales

Home automation is having a moment, spurred on by U.S. consumers' strong interest in security and monitoring products, power and sensors, and digital assistants. **See what we're seeing — take a peek at what's in our new *Future of Tech*[2] report.**



Home automation products are expected to add $1.8 billion in incremental sales through 2018.[1]



Our analysts forecast 74% **growth in the home automation category** from 2016 to 2018, driven by sales of security and monitoring products, as well as growth in power and sensors.

Expect **VR/AR sales in 2018 to be nearly 4 times higher** than they were in 2016. By comparison, drone sales will double over the same timeframe.



Drone sales will be bolstered by the hobby category (priced above $200), for which there is a balance of strong demand and relatively high average sale prices.



> "Digital assistants will claim a major piece of the consumer market in 2018, and in doing so, will drive adoption of compatible devices and solutions."

Stephen Baker
Vice President, Industry Analyst, The NPD Group

The ***Future of Tech*** report is a 24-month tech industry forecast with analysis and insights that cover more than 200 technology categories. To show what's ahead, it combines point-of-sale data, consumer information, and industry expertise to help companies across the industry maximize their potential.

Source: The NPD Group/Future of Tech and Retail Tracking Service

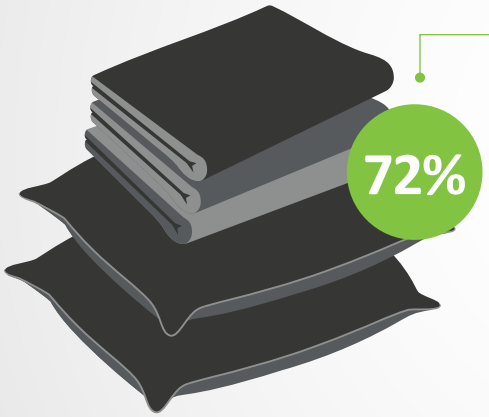
[1]Reached by comparing anticipated 2017-2018 revenue vs. on-record 2015-2016 performance, in order to establish incremental dollars coming to a category. [2]Based on forecasted sales of technology products captured in The NPD Group's Retail Tracking Service point-of-sale data. This does not include mobile phones or Amazon-branded products.

Get more insights like this. Contact your NPD account representative, call 866-444-1411, or email contactnpd@npd.com.

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What's Trending in the Home Textiles Industry?

Online sales in the home textiles industry have had a major impact on the business. Did the back-to-school season also affect sales growth? **Here's a look at the latest home textiles industry insights and trends.**



The bed and bath category is a **$4.2 billion business,** up 4% YOY. **Bedding accounts for 72% of sales.**

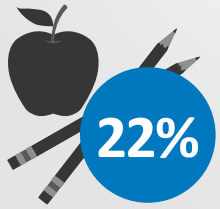
Top Categories in Bedding

1. Sheet sets/pillow cases **(23% of bedding sales)**
2. Sleeping pillow **(20% of bedding sales)**



Online sales grew 2.6 times faster than the brick-and-mortar channel, claiming 12% of the total bed and bath dollar sales. **Online sales are up 9% YOY.**

A closer look at the home textiles consumer. . .



22% of bath accessories consumers and 22% of bath linen buyers aged 18–24 said **"back-to-school/college" is the key driver for purchasing.**



When consumers aged 25–44 **purchased bed and bath products, 55% of the time groceries were also purchased.**

Checkout Tracking℠ is the first service to provide detailed information on consumer buying behavior, based on receipts for both online and brick-and-mortar retail purchases from the same consumers over time. It delivers category, brand, and feature insights, with purchase detail linked to buyers and their demographics. No one other than our clients has such knowledge, such power.

Source: The NPD Group/Checkout Tracking℠, 3 ME September 2016 and LAB Series: Home Textiles LAB Study

Learn more. Contact The NPD Group at 866-444-1411 or email contactnpd@npd.com.

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Living the Hygge Life

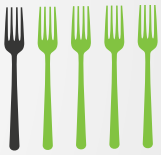
Is there anything more enjoyable than a quiet night in, curled up in a blanket on the couch with a cup of something nice and a binge-worthy TV show on the screen? The Danes have given us a name for this kind of coziness: hygge. That sense of comfort, wellbeing, safety, and togetherness has strong appeal, and it's part of what's enticing U.S. consumers to eat at home more. **See what we're seeing . . .**

Eating at Home



78% of meals are consumed in the home.

4 out of 5 meals are made at home.



Breakfast at Home

73% of breakfasts are consumed at home.



Cold cereal is the top item consumed at home at breakfast.

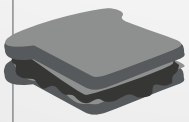
Breakfast is the **most solitary meal** — 55% of breakfasts are eaten alone.



69% occur between **7a.m. and 9 a.m.**

Lunch at Home

51% of lunches are eaten in the home.



Sandwiches are part of over 30% of home-prepared lunches.



82% occur between **11 a.m. and 2 p.m.**

Dinner at Home

81% of dinners take place in the home.



49% of dinner meals **purchased at a restaurant** are taken home to eat.



81% occur between **5 p.m. and 7 p.m.**

Get more insights like this. For 32 years, The NPD Group's annual report on ***Eating Patterns in America*** has been the definitive source for detailed information on eating and drinking habits in the United States. It's solid information you can use to make data-driven decisions.

Source: The NPD Group/Eating Patterns in America, 2017

Learn more. Contact your NPD account representative, call 866-444-1411, or email contactnpd@npd.com.

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Lifestyle Athletic Footwear Drives the Market

Japan's athletic footwear market shows high growth — **value sales grew 11.7%** in the 12 months ending in February, and the market size is JPY 511 billion. Average price increased 3.5%. **Here is a look at what is behind this growth.**

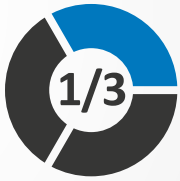
The lifestyle category is the largest and contributes most to the athletic footwear market's growth.

160B¥

This category **accounts for 160 billion JPY and has 31.3% share of the athletic footwear market.** Running, the second-largest category, has 24.4% share.

40%

The athletic footwear market grew by 54 billion JPY. 40% of that growth was from increases in the lifestyle category. Sales of lifestyle shoes were up 21 billion JPY, and share increased 1.0 pt.



Lifestyle Share
1/3 of the Market



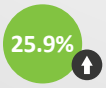
Males lead in the lifestyle footwear category.



Males (older than age 12) **accounted for 58.3% share in the lifestyle athletic footwear** category.



The growth rate for men's sales was **25.9%.**



General footwear stores make up the largest channel in the lifestyle athletic footwear market.



General footwear stores **capture 33.5% market share.**

The **second-largest channel, online stores,** showed the fastest growth, adding to its share by 2.5 pts.



The higher end of the price range wins in the lifestyle athletic footwear market.



Footwear **priced equal to or higher than 7,000JPY on 31.8% share,** adding 5.2 pts.



The **low price range, less than 5,000JPY, lost 6.7 pts share.**

What does recent growth in lifestyle athletic footwear mean for your business? Are you missing opportunities to take advantage of this growth? Get more sports industry insights from The NPD Group.

Source: The NPD Group/Consumer Tracking Service, 12 ME February 2017, with comparisons to same period in 2016 (Data excludes those under age 12.)

Learn more about sports footwear and apparel trends in Japan.
Contact kaori.kawabata@npd.com or yujung.kim@npd.com.

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Understand Kids' Licensed Products Purchasing Behavior

Now you can explore U.S. consumers' purchases of licensed products – going beyond toys – and find out how buying varies by industry. Take the guesswork out of product development and marketing decisions related to licensed products for children up to age 14. **Here's a look at our latest insights.**

#1

Frozen was #1 (4.2%) when it comes to licenses **across all industries.**

#2 Paw Patrol (3.8%)
#3 Mickey and Friends (3.1%)

Paw Patrol was the #1 license in toys, but # 8 in apps. **27% of all licensed products were purchased online;** 7% were purchased from an app. Video games had the highest percentage of online sales.

17%

Despite the fact that this study captured holiday purchase behavior, we saw that 17% of all the license products were purchased for birthdays. **More than 20% of licensed footwear and fashion accessories purchases were made for a child's birthday.**

52%

52% of all licensed product purchases **were driven by the child's request.**

29%

29% of all **licensed products were bought for kids ages 3 to 5,** making this age group the primary driver of licensed unit sales.

33%

Apparel had the largest unit share of licensed products at 33%.

14%

14% of all licensed products were **purchased by grandparents.**



Get more insights like this in the just-released **U.S. Kids' License Report.** It's your new source for data and insights on cross-industry performance of key licenses across 15 industries.

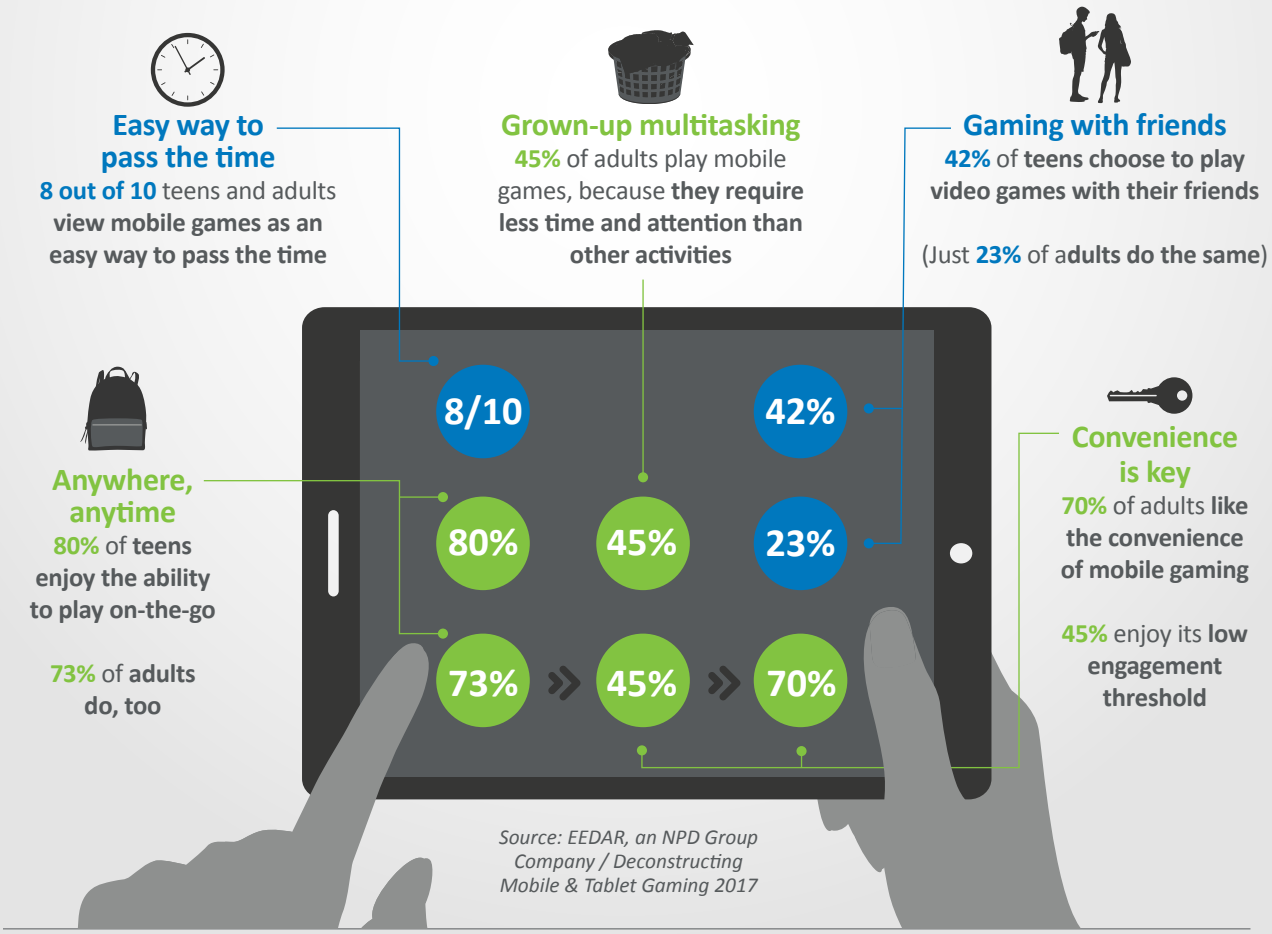
Source: The NPD Group/U.S. Kids' License Report, December 2016 – January 2017

For more information, contact your NPD account representative, call 866-444-1411, or e-mail contactnpd@npd.com.

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Teens and Adults Agree: Mobile Games Rock

With reliable information about how, where, and why U.S. mobile gamers play, you can make business decisions with confidence at every stage in the mobile gaming funnel — from discovery and engagement to virality, retention, and churn.
Here's some of what we're seeing . . .



Source: EEDAR, an NPD Group Company / Deconstructing Mobile & Tablet Gaming 2017

EEDAR's ***Deconstructing Mobile & Tablet Gaming 2017*** report tells the complete story of mobile gaming in the U.S. It reveals gamers' top purchasing motivations and other data so you can analyze genre performance, gauge how the market responds to genre saturation, and much more.

Questions? Contact your account representative or email cwaddell@eedar.com.

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Millennials May Do More With Less, But Not When It Comes To Online Shopping

Millennials in the U.S. are known to be frugal — they're careful about where and how they spend their limited income. And while they shop more frequently at brick-and-mortar retailers, they spend more when they shop online. **See what we're seeing . . .**

Millennials *spend more than twice as much per receipt* when shopping online in 3 categories: **clothing, electronics, and home/kitchen**.

> *"Millennials are learning to do more with less. And spending has become an art form,"* said NPD Chief Industry Analyst Marshal Cohen. *"Understanding what is most likely to influence that spend is critical for success today."*

When *shopping online*, Younger Millennials (18-24) spend an average of **$56.88** per receipt on apparel and accessories. Older Millennials (25-34) average **$70.58**.

At *brick-and-mortar*, the average spend on apparel and accessories is **$23.98** for Younger Millennials and **$24.19** for Older Millennials.

3 factors seem to drive this higher online spending:

1. Minimum order requirements for free shipping
2. The ease of comparing prices for higher-ticket items online
3. Easy return policies for items that often require returns, such as clothing.

Do you know what you need to know about the coveted Millennials and how to capture more of their spending? Checkout Tracking℠ can tell you.

There's a *similar pattern for electronics* — Younger Millennials spend **$53.45** online, and Older Millennials spend **$66.10**. At brick-and-mortar, it's **$23.96** and **$24.83**.



Source: The NPD Group/ Checkout Tracking℠

Learn more. Call 866-444-1411 or email contactnpd@npd.com to learn more.

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What Happens to Breakfast When Millennials Have Kids?

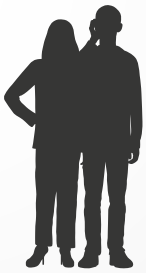
Generational and situational shifts affect eating patterns for people of all ages. Right now we're seeing it among U.S. marketers' coveted Millennials — they're having kids, and it's changing the how, what, and why behind their consumption choices. In fact, when kids enter the home, even Millennial adults succumb to lifestage changes, just not to the degree past generations did. **See what we're seeing.**

What they're choosing for breakfast:



Millennials **with kids** are more likely to choose breakfast foods based on convenience compared to their counterparts without kids.

- **Can be eaten quickly**
- **Don't feel like cooking**
- **Is portable**



Millennials **without kids** are more likely than their counterparts with kids to choose breakfast foods for these satiating reasons:

- **Gives me energy**
- **Is high in protein**
- **Tides me over**
- **Allows me to stay full longer**



Millennials **with and without children** share the same top three breakfast motivations:

1. It was quick and easy to make
2. I regularly eat it
3. It's my favorite

In order to grow and be successful, food companies need to fully understand the motivations and need states that drive consumers' consumption choices. National Eating Trends® Need States and our new report, **Consumption Drivers: How Needs Shape Choices,** deliver deep data and expert insights to help you see what motivates consumption decisions for consumers at every life stage.

Source: The NPD Group / National Eating Trends® (NET®) Need States and Consumption Drivers: How Needs Shape Choices, 2016.

Get more insights like this. Contact your NPD account representative, call 866-444-1411, or email contactnpd@npd.com.

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Food E-Commerce and the Convenience Continuum

As consumers seek more convenience, grocery e-commerce is poised for growth with a low number of lapsed users, a high rate of satisfaction, and a large segment of the population that hasn't tried it yet. **Here's a look at our latest insights:**

72% of those who've ever tried online grocery shopping were active in recent months

71% have yet to try online grocery shopping

63% are completely satisfied with their online grocery shopping experience



More shoppers are experimenting with online grocery shopping, so you need to understand the implications for your business. Keep abreast of the latest e-commerce trends. Stay one step ahead of your competition! ***The Virtual Grocery Store***, a new report from The NPD Group, helps you fully assess this new way to shop, so you have all the information you need to take action now — and plan for what's ahead, too.

Source: The NPD Group / The Virtual Grocery Store report

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Five Surprising Facts About Snacking

U.S. consumers are shifting what they eat at main meals and existing snack occasions and changing their view of snacking. More "snack" foods are being incorporated into the three traditional main meals, and people are increasing the number of snack items they have at their snacking occasions. **Here are some facts that might surprise you . . .**

1

People aren't increasing their snack occasions, but they are **eating more snack foods** across all occasions.

2

Eating snack foods at main meals is being driven by Gen Z and Millennials. Expect to see continued growth of this trend.

3

Everyone (except kids age 9 and younger) has **increased consumption of snack foods "as a snack"** compared to previous generations when they were of similar ages.

4

The **morning and afternoon snack** occasions are being used to extend healthy eating later in the day.

TOP CHOICES

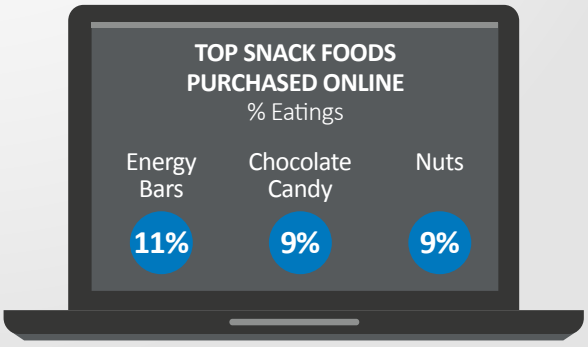
for healthy/nutritious morning and afternoon snacks include:

- Apples
- Bananas
- Nuts/Seeds
- Refrigerated Yogurt
- Water

Source: The NPD Group/National Eating Trends®, year ending November 2015

5

All three major **snack groups** (savory, better-for-you, and sweets) **are increasingly being bought online** – that's a trend to watch.



Source: The NPD Group/SnackTrack®, 2 years ending June 2016

Our team of food and beverage industry analysts expects consumers will continue to increase the number of snack foods they eat at all eating occasions. How can you get in on changes in snacking behavior and make them benefit your business?

Get more insights like this.
Call 866-444-1411 or email contactnpd@npd.com.

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Toy Sales Around the Globe

Toy industry sales grew by 1% in 2017 across the 12 global markets NPD tracks, reaching a total global market size of $89 billion. Toy sales grew most in Mexico and Russia. The U.S. market, the world's largest, grew 1%. Declines were noted for Great Britain, France, and Australia. **Here's a closer look at the results . . .**



Global Toys 2017 Sales Performance by Country

Dollar % Change vs. 2016

Australia **-2%**	Germany **0%**	Netherlands **3%**
Belgium **2%**	Great Britain **-3%**	Russia **11%**
Canada **3%**	Italy **0%**	Spain **2%**
France **-1%**	Mexico **12%**	USA **1%**

2017 Toy Category Highlights:



Top supercategories for growth? All other toys, plush, and dolls — both globally and in the U.S.

Globally, all other toys grew its sales by 14%, driven by fidget toys and slime kits.





Collectibles were a toy industry growth leader, up 14% globally and accounting for about 8% of total industry dollar sales.

5% **Dolls were up 5%,** led by L.O.L. Surprise!

6% **Plush sales increased by 6%,** led by Hatchimals.

3% **The games/puzzles supercategory grew its sales by 3%** both globally and in the U.S.



> There's a need for speed in the world today. In the current retail environment, it is imperative to react quickly to changing tastes and fast-moving trends. Toy companies, whether big or small, who are nimble enough to react faster and get to market quicker are the ones who will win in the long term.

Juli Lennett
Senior Vice President and U.S. Industry Advisor, Toys, at The NPD Group

Source: The NPD Group / Retail Tracking Service, January-December 2017

Get more insights like this. Contact your NPD account representative, call +1 866-444-1411, or email contactnpd@npd.com.

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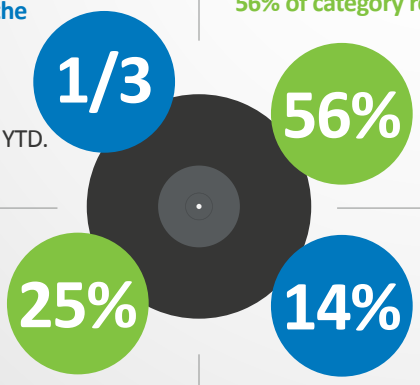
Turntables:
When Old Becomes New Again

Turntables have long had more of a place in Americans' basements and attics than in their living rooms and bedrooms. But they're back with a vengeance! After posting strong, double-digit growth in 2015 and 2016, the trend continues into 2017 — turntable revenue is up 8% and units have declined 1% so far this year.

Here's a look at our latest insights . . .

Crosley and Jensen, 2 of the top 5 turntable brands, have experienced drops in volume. **Innovative Technology has emerged as the new leader, claiming about 1/3 of turntable dollars and units** YTD.

Turntable volume spiked in **November and December** 2016. Those 2 months **accounted for 56% of category revenue** last year.



While 2/3 of turntables are still a more traditional brown or black color, unit volume for **red models increased 25%** in the first two months of this year.

The $50.00 – $74.99 price band **grew 14% this February** compared to last.

Total turntable revenue in 2016 =

$98 MILLION



Will this category's growth continue? Or will turntables turn out to be a fad, appealing to retro-minded music lovers? Only time — and our ongoing Store-Level Enabled retail tracking data — will tell.

Source: The NPD Group/Store-Level Enabled Retail Tracking

Get more insights like this. Contact your NPD account representative, call 866-444-1411, or email contactnpd@npd.com.

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Unlocking the Secrets of Unlocked Phone Owners

As the unlocked phone market grows in the U.S., differentiation will be key for original equipment manufacturers. Price is one competitive component, but in addition, devices will need compelling features and functionality to appeal to consumers and retailers alike. **See what we see . . .**

30 million U.S. consumers have unlocked phones – that's 12.5% of the market. **12.5%**

30% 30% of unlocked phone users **switched carriers when purchasing a new device,** compared to 24% of locked phone users.

"Freedom to choose a future network" is the top motivation for purchasing unlocked phones. **#1**

45% 45% of unlocked phone users cite **"lowering cost" as the top reason to switch carriers,** compared to 34% of those with locked devices.

48% of unlocked phone users **switched brands when upgrading devices,** compared to 37% of locked phone users. **48%**

$$$ Among unlocked users, **brand loyalty increases with price paid.**



Want more insights like this? The ***Unlocked Phone Demand Report 2.0*** from NPD's Connected Intelligence has the comprehensive data and reliable analysis you need to clearly see all of your market opportunities. It can help device manufacturers, retailers, and carriers discover new entrants in the market, make sense of purchase motivators and other consumer information, and inform winning business decisions in the unlocked phone market.

Source: The NPD Group/Connected Intelligence, Unlocked Phone Demand Report 2.0

Learn more. Contact your NPD account representative, call 866-444-1411, or email contactnpd@npd.com.

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The Ultimate Fast Food Fight: How Convenience Stores Are Winning Market Share

Convenience stores are one of the few growing segments in the U.S. foodservice industry. They're food-forward, evolving, and rapidly creating new opportunities for manufacturers and operators to gain new revenue.

Here's a look at what we're seeing.

Top 5 growing categories:

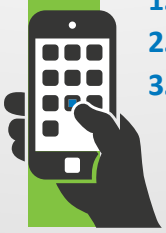
- Salty Snacks
- Candy/ Gum
- Fresh Food/ Prepared On-Site
- Tobacco/ Tobacco-related Products
- Lottery Tickets

Opportunity:



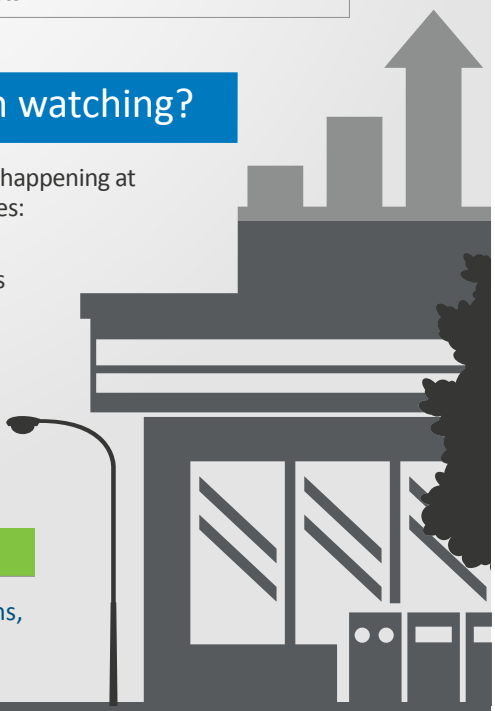
of c-store customers are lottery ticket buyers, but many of those potential big winners buy nothing else. Imagine the windfall if retailers can tap into these consumers to get them to buy one other item!

What's worth watching?



Major innovation is happening at food-forward c-stores:

1. Carry-out options
2. Online ordering
3. Rewards apps



1 in every 10 QSR visits are sourced to c-stores!

Tap into NPD's deep c-store data and expert insights to support data-driven decisions, stay current on trends, and maximize opportunities to grow your business.

Source: The NPD Group/Convenience Store Monitor, December 2016

Learn more. Contact your NPD account representative, call 866-444-1411, or email contactnpd@npd.com.

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The Ultimate Fast Food Fight: How Convenience Stores Are Winning Market Share

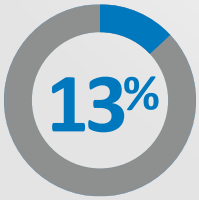
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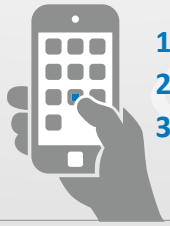
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Source: The NPD Group/Convenience Store Monitor, December 2016

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Strong October Sales for Hardware, as Software and Accessories Lag

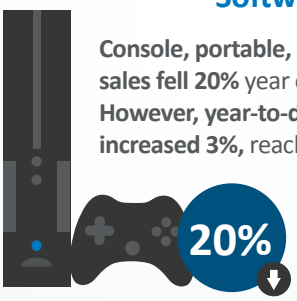
October gains in hardware spending could not offset declines in software and accessories sales, leading to an overall 11% decline in game industry revenue for the month.
Here's a look at some of what we saw in October . . .

Hardware



Thanks to Nintendo Switch and SNES Classic, **hardware spending grew 10%, reaching $238 million.**

Software



Console, portable, and PC games software sales fell 20% year over year, to $474 million. **However, year-to-date consumer spending increased 3%,** reaching $4.2 billion.



Accessories



Spending on accessories and gamecards **fell 7%, to $113 million.**

Genre Spotlight

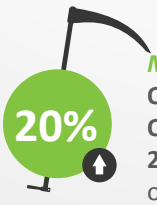
Racing games sales more than doubled in October compared to last year — and they're up 37% so far for the year.





Steering wheels spending more than doubled since last year, led by Forza Motorsport 7 and Gran Turismo Sport.

Title Spotlight



Middle Earth: Shadow of War **was October's best-selling game on both Xbox One and PlayStation 4. Sales grew over 20%** when compared to the launch month of Middle Earth: Shadow of Mordor.



Super Mario Odyssey **debuted at #3 on the all-platforms chart.** It recorded the third-highest launch month packaged-software sales for a Mario action-adventure title.



Destiny 2 **is the best-selling game so far this year.** It was the second best-selling game for the 12 months ending October 2017.

Will the software and accessories markets rebound during the holidays and recover lost growth? Our analysts are keeping track of all the moving targets, so stay tuned.

Source: The NPD Group/Games Total Physical Sales, October 2017
The NPD Group's monthly point-of-sale data reports on U.S. video games industry sales occurring from new physical purchases at retail as well as full-game downloads from participating publishers on PlayStation, STEAM, and Xbox platforms.

Get more insights like this. Contact your NPD account representative, call 866-444-1411, or email contactnpd@npd.com.

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The Evolution of Healthy Eating

Today's healthy-eating fad could be tomorrow's longstanding trend; but it's also possible that what's deemed "healthy" by consumers today could easily change tomorrow. That's why keeping current on the how, what, and why behind consumption choices is crucial. **Take a look at what we're seeing.**

Although needs change throughout the day, a version of wellness is always present.

	Breakfast	Morning Snack	Lunch	Afternoon Snack	Dinner	Evening Snack
Fueling	●	●	●	●	●	
Wellness	●	●	●	●	●	●
Connecting			●	●	●	●
Gratifying	●	●		●		●

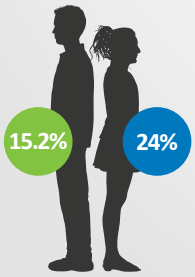
Top snack foods for consumers motivated by nutrition and health benefits:



1. Fresh fruit **2.** Refrigerated yogurt **3.** Nuts
4. Fruit cups/applesauce **5.** String cheese/prepackaged cheese cubes/shapes

Source: The NPD Group/SnackTrack®, two years ending March 2017

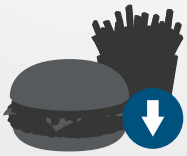




Women are more likely than men to actively **seek out natural and whole foods.**

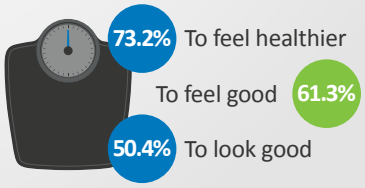
Source: The NPD Group/Dieting Monitor, year ending April 2017

The percentage of adults who eat **"whatever tastes good" is declining**



Source: The NPD Group/Dieting Monitor, years ending December 2016

Leading reasons adults **go on diets**



Source: The NPD Group/Dieting Monitor, year ending April 2017

In order to grow and be successful, food companies need to fully understand all the motivations and need states that drive consumption choices. **National Eating Trends® Need States** and our new report, **Consumption Drivers: How Needs Shape Choices,** deliver deep data and expert insights to help you see what motivates consumption decisions at every point in the healthy-eating continuum.

Source: The NPD Group / National Eating Trends® (NET®) Need States and Consumption Drivers: How Needs Shape Choices, 2016.

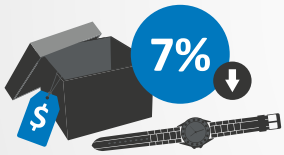
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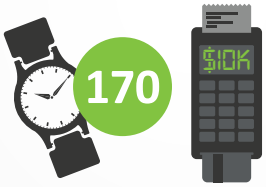
The Watch Market is Worth Knowing

Manufacturers and retailers are facing challenges to find growth in the U.S. watch category as unit and dollar sales have declined in each of the last two years. Yet consumers purchased more than 43 million watches in 2016. There are patterns emerging to help the industry provide what consumers want to buy.

Here's a look at what our Retail Tracking Service uncovered in the watch market. . .



MSRP sales fell 7% versus a year ago in the watch category.



170 watch models were introduced in Q1 2017 with at least **$10,000** in MSRP sales.



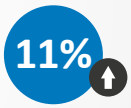
The **best-performing price** segment was $800-$1,000, where **MSRP sales were flat** vs. last year.



Miami-Ft Lauderdale was ranked #3 among top 25 DMAs for watch category sales (#4 last year).*



35 brands (among the top 100 sellers) **increased MSRP sales** vs. year ago.



Sales of **watches with blue dials** were up 11%.



Start seeing what others cannot. Go to the source that provides in-depth industry insights. The NPD Group can help you grow your business and get a winning advantage.

Source: The NPD Group/Retail Tracking Service, 3ME March 2017 **Department/national chain and jewelry chain channels only*

Learn more. Contact your NPD account representative, call us at 866-444-1411, or email contactnpd@npd.com.

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Grilled Meats and Cool Treats for Summer

As the seasons change, U.S. consumers' snack and meal choices also shift. Summer temps are on the way for much of the country, so interest will turn to outdoor grilling and icy delights that help people beat the heat.

Here's a look at some summertime insights to help you prepare for what's next.

Grilled Meats

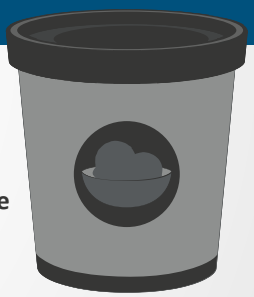
Overall, **Millennials are underdeveloped in outdoor grilling** compared to other generational groups

But Millennials, particularly younger ones, are **more likely than other groups to grill outdoors at lunch**

- **21%** — **21% of younger Millennials grill outdoors at lunch,** compared to 14% of total individuals

Chicken and burgers are the top foods Millennials grill outdoors

Cool Treats

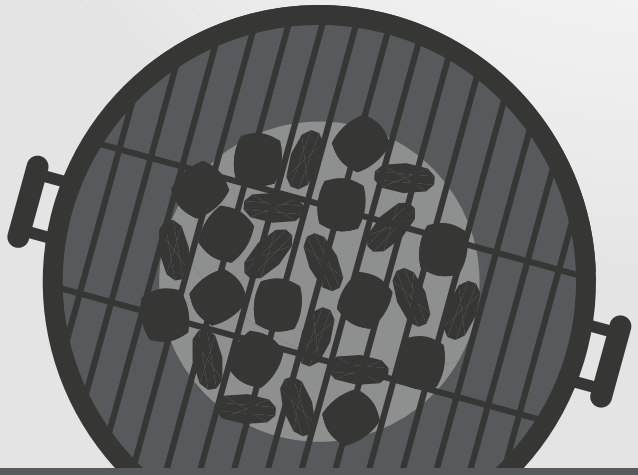


83% — **Ice cream is significantly more likely to be consumed at home (83%)** than frozen yogurt (67%)

1/3 — 1/3 of ice cream is **eaten while consumers are watching a television show**



10% — 10% of ice cream is **eaten in a cone**



NPD's **National Eating Trends® (NET®)** and **SnackTrack®** work in tandem to give you the deepest, most comprehensive view of consumption throughout the year. Find out why the smartest companies in the industry depend on our data, insights, and expertise to understand what consumers are really eating and drinking.

The NPD Group/SnackTrack®, two years ending December 2016; and National Eating Trends®, two years ending November 2016

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