

**June 2013**

## **Asia-Pacific Retail Handbook - Asia Pacific**

This is the ninth edition of the Asia-Pacific Retail Handbook and, like its predecessors, it is designed to complement the European Retail Handbook. This year's Asia-Pacific Retail Handbook follows the format of last year's with profiles of the major retailers in the region and a survey of 16 countries. The ...

## **Body Care - US**

"While the body care category has been struggling, shifting consumer's focus from price and promotional incentives to improved functionality and value-added benefits should help put the category on a growth track."

## **Canadian Loyalty in Financial Services - Canada**

"Canada has a mature loyalty market and the vast majority of adults belong to at least one – and usually several – programs. They are somewhat underutilized, however, with most participants rarely, if ever, actually redeeming any rewards. The challenge for program managers is how to make their programs effective ...

## **Changing Eating Habits - Brazil**

"Consumers are increasingly searching for convenience, either because they are pressed for time or because they prioritize tasks other than cooking. This is creating growing demand for products that make cooking easy, such as ready meals and ready-to-cook meals, but also for on-the-go products and for fast food restaurants."

## **Civil Engineering (Industrial Report) - UK**

This report will help you to uncover opportunities and understand the key issues affecting your market. How? By giving you instant access to analysis and critical recommendations. It will also challenge routine thinking by providing fresh, new perspectives that energizes your thought processes.

## **Consumer Trust in Food - UK**

## **Asian American Premium Brand Consumer - US**

"Asian American consumers control substantial collective buying power, but cannot be addressed as one group. Because there are multiple languages and multiple generations to address, promoters of luxury goods to Asian audiences would do well to focus on a particular Asian subgroup."

## **Body, Hand and Footcare - UK**

"More than one in three people feel a twinge of guilt about their bodycare routine: companies have access to a potentially receptive target group (35%) who feel they should use bodycare products more often. Finding a way to harness the guilt will help boost usage and stem declining value and ...

## **Carbonated Soft Drinks - US**

"Carbonated soft drink manufacturers are faced with a challenging marketplace in which they are battling not only to retain current users who are being encouraged to make healthy choices, but also to regain consumers who have already sought out alternatives. Companies are hedging bets on multiple packaging sizes, flavor innovations ...

## **Children's Lifestyles - UK**

"Parents leading by example would be more effective than disciplining at instilling healthy habits in children and cementing parents' status as role figures."

## **Cleaning the House - US**

"Housecleaning is a time-consuming but emotionally satisfying task that consumers view as important not only in making their homes presentable but also in keeping their families healthy. While housecleaners express interest in products that make cleaning faster and more efficient, they are more likely to prioritize cleaning effectiveness."

## **Critical Illness Cover - UK**

“Nearly eight in ten adults consider the food industry to be too reliant on mass manufacturing. However, for mass-produced products, highlighting the involvement of humans – whether it’s a farmer, company owner or even the workers on the production line – on-pack or in other communications, can help to convey ...

## Digital Trends - China

“The high level of smartphone penetration and social network usage in China suggests that there is a lot of potential in technology products that are sold with integrated content services built in.”

## Drinking in the Home - UK

“Lower-alcohol drinks tend to be cheaper, because of lower taxation, and are often lower calorie. Both factors should make them attractive to people drinking at home, helping to retain users at a time when people are cutting back on spend.”

## Estilo de Vida Ocupado e Hábitos Convenientes - Brazil

“A população brasileira sente o impacto do desenvolvimento econômico do país na sua rotina, que está cada vez mais cheia de responsabilidades e trabalho. As mães são as mais sobrecarregadas: encontram oportunidades profissionais, lideram os serviços domésticos, tentam cuidar dos filhos e quase não têm lazer para si mesmas, o ...

## Grocery Pricing and Promotion - US

“Digital promotions represent the future of most industries, including the grocery retail trade. Effective digital promotions do much more than simply re-create the traditional coupon experience on a new platform. Marketers are finding ways to digitally bring value to customers in extraordinary new ways. Adapting current technology can help grocers ...

## Health and Fitness Clubs - UK

“One area where there could be potential is for a kind of ‘budget plus’ club, where elements of the budget format

“Insurers need to address issues of trust in the critical illness market, but perhaps more importantly they need to convince people of the value of the product. At the moment far too many see critical illness as a nice-to-have product. This is despite dwindling state support and statistics that suggest ...

## Digital Trends Summer - UK

“Manufacturers of technology products are placing more emphasis on monetising their content platforms, so much so that they are often willing to take a hit on hardware margins. This trend, where content is becoming king, could start to expand into more product sectors as brands may look to subsidise product ...

## Eating Out Review - UK

“A renewed focus on the basic principle of emphasising the ‘experience’ of eating out should help operators reclaim market share, particularly in sectors such as pizza/pasta restaurants where brand loyalty is low due to an extended period of heavy discounting.”

## European Retail Briefing - Europe

This report will give you fast, easy access to robust information from analysis and critical recommendations – so you can make the right decisions, at the right time. It will challenge routine thinking by providing you with fresh, new perspectives that energize your thought process.

## Haircare - China

“In the big picture, Chinese consumers are becoming richer. Higher income, lower savings, and broader prosperity have led to more purchasing power. At the same time people are also becoming more demanding. But those brands able to offer the best combination of products tailored to the right occasion will gain ...

## Health and Fitness Clubs - US

“Though membership and revenues at health and fitness clubs have appeared to recover from the recession,

are retained but with a wider range of facilities in order to broaden appeal.”

## Hispanic Consumers' Share of Wallet - US

“Hispanics have cut back their spending since the last recession, but are still treating themselves to a certain extent. They are also very reluctant to use any kind of debt to pay for things—preferring to pay cash instead.”

## Holiday Centres - UK

“Holiday centres still show very similar seasonal patterns to domestic tourism as a whole and could do more to promote awareness of their year-round weather-proof advantages compared to many other UK holiday types. The proportion of breaks taken during the winter months remains especially low. According to Mintel’s research, only ...

## Ice Cream - UK

“While the ice cream market continues to struggle, sales of frozen yogurt are soaring, with the segment benefiting from its naturally low-fat positioning. However, representing less than 1% of the total market, it remains fairly embryonic. This suggests there are lucrative opportunities for ice cream brands to grab a slice ...

## Lunch Meat - US

“The lunch meat category enjoys high household penetration rates but is now grappling with the challenge of decreasing personal usage due to consumer price and health concerns.”

## Marketing to the Middle Classes - China

locations are still under pressure to perform. The market of health and fitness clubs is up against several challenges, including increased free alternatives and high price points. Clubs that can meet a variety of ...

## Hispanics' Attitudes Toward Buying a Car - US

“Hispanic car buyers are less likely than non-Hispanics to purchase cars through traditional retail channels, and are more inclined to purchase Japanese vehicles over domestic. Automakers and car dealers that want to pick up more sales from this burgeoning car buying class will want to focus on Hispanic youth who ...

## Household Cleaning Equipment - UK

“Encouraging people to trade up is the biggest challenge facing the household cleaning equipment market, as most people see these products as staple, need-driven purchases that they do not want to pay more than they have to for. Brands need to encourage consumers to shift some of their focus away ...

## International Hotel Industry - International

“The four major BRIC countries (Brazil, Russia, India and China) continue to be targeted for hotel chain expansion, but the Chinese market is beginning to look saturated, especially in the upscale to luxury sector. India and Brazil have substantial growth potential and Russia has the biggest development pipeline in Europe ...

## Magazines - UK

“Publishers need to look beyond traditional print-style purchasing models and explore non-traditional methods that will perform better in a digital environment. For example, readers could have the option to unlock content article by article for small sums of money, or through credits earned through watching adverts, sharing content on social ...

## Meat Alternatives - US

“Health perception plays a large role in use of meat alternatives. One third of consumers indicate using

“China’s vast area, different levels of regional development and varied cultures mean that the middle class cannot be regarded as a single segment but represents multiple segments. These multiple markets present opportunities and challenges for companies, especially multinationals. In order to understand middle class needs and aspirations, companies need to ...

## Milk and Flavoured Milk - China

"China’s milk market is attracting more international players. With increasing competition, manufacturers should look at opportunities beyond traditional demographic-specific targeting, to educate consumers about which milk is right for them and drive consumption out-of-home to drive sales."

## Music Festival Tourism Worldwide - International

Music festivals are big business, and have become a significant part of the overall music tourism market. Music festival tourists, who can be defined as persons travelling domestically or internationally (outside of their place of usual residence) to experience live music at a festival event (rather than an individual concert ...

## Occupational and Group Pensions - UK

“Pension reforms are going to encourage much-needed innovation in the occupational pension market. Pension providers will have to create more efficient business models if they want to engage with employees on low wages and SMEs and reap the rewards of auto-enrolment. Appealing to the mass market will have to involve ...

## Oral Healthcare - UK

“Appearance, health and hygiene remain the most important drivers in this category, with older people more focused on health and hygiene and younger people more focused on appearance. With the growth of the oldest and youngest demographics predicted, this offers opportunities for more tailored product offerings. Own-label remains competitive in ...

## Pet Supplies - US

products in the category because they are healthy, higher than any other reason measured in the report (including the reduction of meat consumption).”

## Mudanças nos Hábitos Alimentares - Brazil

“A mudança no cenário econômico e político está impactando diretamente nos hábitos alimentares dos brasileiros. Devido a ações do governo, há um aumento no número de empregos formais, o que contribui para a estabilidade do consumo de todas as classes sociais. Pessoas de classe AB são favorecidas por meio de ...

## Nappies and Baby Wipes - China

“The nappies and baby wipes market in China continues to grow strongly and holds great future potential, but realising that potential will mean facing the challenge of improving product quality and benefits, communication with consumers, and utilizing the increasingly complex range of retail channels to connect with consumers.”

## Online and Mobile Shopping - US

“The majority of e-commerce shoppers purchase goods online via laptop/desktop computers. Though they tend to stick to ‘familiar’ online retailers, the frequency in online shopping is significantly less than those who shop via smartphones or tablets. These shoppers, however, tend to be savvy, to be more incline to compare ...

## Pest Control and Repellents - US

“Market players will be able to rely on consumers’ continued usage of pest control products and services to deal with pest problems in their home. However, the market does have some challenges. Consumers are mostly reactive when it comes to pest control activities, they have concern around products’ chemical content ...

## Researching and Buying Technology Products - UK

“As digital communications replace traditional human interaction, pets fill a void for physical companionship. As a result, a strong bond develops and provides the impetus for pet owners to seek out the same quality and attributes in products for their pets as they do for themselves. Innovation is adapting to ...

## Soap, Bath and Shower Products - China

“The market growth is driven by the shower and liquid/gel soap categories as consumers increasingly shift from the basic soap bar to the more convenient format of liquid soap/shower gel. The growing sophistication in consumer usage regimes including applying products that complement each other and using products with ...

## Sopas - Brazil

“Enquanto três em quatro brasileiros tomam sopa, o hábito de consumi-la é pouco frequente. Cerca de um quarto dos consumidores tomam sopas 'menos de uma vez por mês'. A sopa caseira é a mais popular: mais de um quinto dos brasileiros a consomem 'uma ou duas vezes por semana'. Dentre ...

## South Africa Outbound - South Africa

South Africa is one of Africa’s biggest economies – a young democracy still working to overcome the legacies of several decades of apartheid. The ‘Rainbow Nation’ has largely prospered in the post-apartheid era, leading to rising incomes and more middle-class consumers. However, this is a diverse country of many extremes ...

## Tea and Other Hot Drinks - UK

“Tea enjoys a long-established role as a quintessentially British drink. Even today, the majority of consumers see tea drinking as part of being British, and report enjoying the ritual of drinking tea, offering a strong platform for communication around these issues.”

## The Business Traveler - US

“Younger consumers are more likely than older consumers to shop across online and in-store channels. In the years to come, as the 25-34s mature they are likely to keep these shopping habits, making a multichannel approach the standard way to research and buy technology. This evolution of the technology shopper ...

## Social Networking - US

“The bridge to greater efficacy in social network ads and the road to greater ad sales for networks are intertwined around a single segmentation that rises above industry verticals—how the networker feels about brand interactions on ‘her’ page or feed in general.”

## Soup - Brazil

“While three in four Brazilians eat soup, they do so infrequently. The most popular type of soup is homemade, which is consumed more frequently. Companies could make the soup category more attractive to consumers by exploring satiety and attributes normally associated with homemade meals. Convenience is also seen to be ...

## Supermarkets and Hypermarkets - China

“In order to remain competitive, supermarket and hypermarket chains are developing new store formats to suit differing local market needs, and are adapting their product and service offerings to differentiate themselves from their competitors.”

## Term Assurance - UK

“Mintel’s research identifies around 3.4 million prospective life insurance customers. These are people who do not currently have a policy, but who say they might consider arranging one within the next 12 months. There is clearly good potential to expand the market by promoting simple, affordable and flexible solutions ...

## The Time-Pressed Consumer - Brazil

“The most successful travel providers will provide travelers with cost incentives and tools that give them home-like comfort while on the road. Nowadays, many travelers are on the road primarily for short-stay conferences and seminars. However, there are still more engaged travelers who not only take business trips for a ...

## Theme Parks - US

“The theme park industry is healthy and growth is forecast due to increasing attendance numbers and greater per diem expenditures in park. However, theme parks can grow revenues further by incorporating other forms of leisure entertainment – namely, gaming and the internet – into their offering. Theme parks also can ...

## Tubes and Pipes (Industrial Report) - UK

This report provides market research and analysis on the critical issues affecting the market. Not only does it explain the trends and identify future scenarios, but contextualises it in clear and concise formats, illustrated with tables and charts.

## Underwear - UK

“Average spend per head on underwear remains low, as a result of the wide availability of low-priced pants and bras, the popularity of multipacks and half of consumers only buying new items when their old ones have worn out.”

## Washers and Dryers - UK

“The next generation of laundry appliances will use increasingly clever automation to improve convenience and performance, but consumers will need some time to adjust their thinking and trust their appliances to take decisions and get things right for them. Imagine trusting the machines to take the right choices about that ...

## Wine - Ireland

“The Brazilian population is feeling the impact of its country’s economic development in its daily routine, which is becoming increasingly filled with responsibilities and work. Working mothers are the most overloaded; they are meeting professional challenges, doing most of the housework, trying to care for the children, and have almost ...

## Trends in Snacking and Value Menus in Restaurants - US

“Consumers are shifting the way they use foodservice. Instead of large meals, they are tending to snack more. This is a reflection of the economy, as well as their focus on health concerns. Consumers are also using snacking as a way to socialize, choosing snacks rather than meals and sharing ...

## UK Retail Briefing - UK

Each month Mintel’s UK Retail Briefing concentrates on a particular sector or market. This month’s focus is on beauty and personal care (BPC) retailing, with a focus on specialist health and beauty (H&B) retailers.

## Vitamins and Supplements - China

“The Chinese vitamins, minerals and dietary supplements market has grown solidly in the last five years. The market is being driven mainly by increased demand and diversification in retail channels. Market demand continues to rise on the back of increased awareness of health and health issues due to government policies ...

## Web Aggregators in Financial Services - UK

“Price comparison sites still need to convince consumers that they can offer the best possible deal. Many consumers begin the purchasing journey using price comparison sites but end up dropping out before the process is complete. Many of these people choose to drop out in order to check if they ...

## 原味奶与调味奶 - China



“With aggregate new product launches declining, flavour innovations similar to those seen in the cider category provide the drinks companies serving the Irish wine industry with an opportunity to breathe fresh life into a declining market and create potentially lucrative new revenue streams.”

## 婴儿尿片和湿巾 - China

一次性纸尿裤和婴儿湿巾市场仍有相当大的增长潜力，但是这将依赖于制造商围绕产品质量、安全、功能和便利优势向消费者进行更好的宣传。此外，各制造商也日益需要提供适合不同年龄的婴幼儿、不同发育阶段（例如如厕训练、学步等）以及满足各收入阶层消费者需求的更丰富的产品系列。

## 数码科技趋势 - China

本报告考查了中国消费类电子科技和数字化媒体的发展趋势。这是《数码科技趋势》中国系列的首份报告，着眼于过去三个月内科技设备的拥有和使用。英敏特的消费者调查数据也展示了消费者打算在未来几个月内购买的科技产品，分析了科技设备销量增长或下降的诱因。

## 超市和大卖场 - China

由于中国经济增长逐步放缓，而且随着人均收入水平迅速增长拉动了消费力的提升，消费者变得越来越挑剔，所以，超市和大卖场零售商不得不加倍努力，以满足消费者对服务质量和便利性不断攀升的期望值。在中国，在将其覆盖面拓展至新区域的同时，超市和大卖场零售商还面临着在较发达地区日益激烈的市场竞争中脱颖而出的压力。与此同时，随着大型网上超市零售商的迅速崛起为现代杂货连锁企业在网购领域的发展和创新的施加了进一步的压力，在线零售的增长已在该行业引发了新一轮的竞争挑战。

## 香皂和洗浴用品 - China

2007-2012年，中国香皂和洗浴用品销售额达到了201亿元人民币，年均复合增长率达11.6%。淋浴产品与洗手液/免洗洗手液品类推动了市场增长，越来越多的消费者已经从基本固体肥皂转向更加方便的洗手液/沐浴露。

自2008年爆发婴儿配方奶粉三聚氰胺危机后，中国牛奶市场受到了越来越多的国际关注。产业生产链的分散性及不完善使得国内牛奶厂商难以满足消费者对于牛奶的量和质方面日渐苛刻的需求。进口超高温瞬时灭菌（UHT）奶不断涌入中国牛奶市场不仅表明中国牛奶市场正吸引着越来越多的国际牛奶厂商进入中国，同时还表明中国牛奶市场，无论是在产品、价格方面还是在购买渠道方面，竞争日趋激烈。

## 护发品（包括洗发，护发，染发，造型产品） - China

中国消费者变得更富裕。收入更高、储蓄更少以及经济更发达使得中国消费者的购买力更高。与此同时，人们也变得越来越挑剔。只有根据特定场合量身定制最佳产品组合的品牌才能争取到这些精明的消费者。

## 维他命和保健品 - China

中国维生素、矿物质及膳食补充剂市场在最近5年间取得了稳固增长。根据英敏特的研究，在2007-2012年间中国维生素和矿物质市场总销售额的年均复合增长率（CAGR）达到了13.7%，从2007年的113.6亿元人民币增长到2011年的190亿元人民币，2012年预计将会达到215.5亿元人民币。国家政策推动、经济增长生活方式改变下人们健康危机和健康意识不断提升所引发的市场需求增长、渠道多样化等因素成为市场的主要推动力。

## 针对中产阶级的市场营销 - China

英敏特预测截至2015年中国中产阶级户数将突破3,500万大关。英敏特报告《消费者生活方式：中国的中产阶级——中国，2012年6月》深入分析了营销商应如何瞄准该消费群。中国拥有巨大的日益富裕的城市中产阶级消费者市场。未来数年该市场将继续增长，这意味着有必要了解中国新兴中产阶级以及金融改革、全球竞争力、社会发展甚至环境可持续性等各种正在进行的变革。