

November 2014

Aerospace Industry (Industrial Report) - UK

“With the growing involvement of the government, both in terms of policy direction and financial contribution, the UK aerospace industry is preparing itself for the long battle ahead to retain its position as the leading industry in Europe and the second largest globally, behind only the US. The main competition ...

Alimentação Saudável - Tendências - Brazil

“Existem oportunidades para se trabalhar mais o posicionamento de um produto saudável. Ele pode ser mais abrangente, se for direcionado para o público jovem, mas também pode ser mais específico, como no caso dos produtos diet. Para os produtos funcionais, é importante comunicar melhor os benefícios prometidos, para que o ...

Babycare - China

“The relaxation of the one-child policy in 2013 will result in more newborns in the future. This coupled with increasingly disposable income and growing appreciation towards baby care products will foresee growth of China's blooming baby care market from RMB 4,283 million in 2013 to reach RMB 8,871 million in ...

Beauty Retailing - Brazil

“The Brazilian beauty market operates multichannel. Door-to-door sales still play an important role in this segment, but the internet can become an important competitor. For companies that operate door-to-door, the challenge is to balance both retail channels.

Cause Marketing - US

“As partnering with a cause organization has become a standard marketing tactic, it has become increasingly difficult to stand out from competitors using cause marketing. Consumers have become skeptical of cause

Affluent and HNW Investing - UK

“While the traditional model is under threat from a mix of rising costs, greater pricing transparency and intensifying competition, a new breed of wealth manager is starting to emerge. This could demystify the investment expertise of established discretionary managers and put their fees under greater pressure and scrutiny.”

– ...

Attitudes toward Private Label - US

“Despite the substantial advances store brands have made in terms of quality, Mintel's consumer research reveals that more than four in 10 consumers still perceive store brands to be inferior to national brands. Store brands must do a better job of distinguishing between their value and premium tiers to attract ...

Beauty and Personal Care Packaging Trends - UK

“First-and-foremost, packaging needs to be practical, however, the in-home longevity offered from the BPC (Beauty and Personal Care) category adds greater potential for companies to focus on the aesthetics of their products in order to add value; raising their profile with impressionable young Millennials in particular. Further opportunities exist in ...

Car Aftermarket - UK

“Although the car parts aftermarket is seeing growth it remains one that is subject to a number of pressures. These are coming from various directions with the current buoyancy of new car sales and move towards budget brands joined by wider trends such as the impact of the ageing population ...

CCTV (Industrial Report) - UK

“The prospects for the UK CCTV industry appear strong, with construction in the commercial sector anticipated to climb steadily and the private sector widely upgrading systems. As a result, the market is expected to deliver

marketing and some brands have seen backlash from aligning with controversial causes.”

Charitable Giving - UK

“A focus on engagement with core supporters and innovation in fundraising techniques are a must for today’s charitable organisations, particularly as donors are becoming increasingly weary of established methods, which, in turn, affects charities’ bottom line.”

– **Ina Mitskavets, Senior Lifestyles and Consumer Analyst**

Cinemas - UK

“Further integrating mobile into the cinema experience presents many opportunities for operators, including improving the efficiency of booking systems, boosting additional purchases and creating targeted marketing campaigns.”

– **Rebecca McGrath, Research Analyst**

Consumer Payment Preferences - Canada

“Security and trust issues are the dominant factors in the minds of consumers at present and override the convenience benefits of contactless cards and mobile banking. This is likely to change in the near future as these concerns dissipate with the introduction of superior security features.”

– **Sanjay Sharma ...**

Diet Trends - US

“Due to rising levels of obesity, the diet market is poised for growth. However, a great deal of skepticism toward products is hindering growth.”

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

European Retail Briefing - Europe

real terms growth again in 2015.”

– **Ben Harris, Industrial Analyst**

Childrenswear - UK

“While fashion is not the main priority for parents, almost half of girls aged 7-14 worry about whether their clothes look fashionable. Given that young girls prefer to shop with their parents, as they get older they are likely to exert an influence over where they shop and what clothes ...

Coffee Shops - China

Consumer Payment Preferences - UK

“Developers should reframe their task from making it easier to make a payment, and focus on making it easier to find and make purchases. Payments are a means to an end for consumers, payment platforms should remember this.”

– **Rich Shepherd, Financial Services Research Analyst**

Domestic vs Overseas Tourism - Ireland

“After a challenging period of economic downturn both at home and abroad, there is much to suggest that the Irish tourism sector – both in NI and RoI – has emerged stronger and leaner, and is well placed to exploit and benefit from the expected growth in global tourism activity ...

Fish and Shellfish - UK

- An analyst comment about the apparent slowing of the discounters' progress in Poland.
- An overview of the the latest European retail sales data across the five major European economies.
- A profile of discount food retail group, Schwarz, owner of the Lidl fascia. This is taken from our recently published **Supermarkets ...**

Football - UK

“Football’s offerings across the digital platforms that are the game’s new frontier are so far preaching primarily to the converted rather than building a new audience beyond its core match-going support.”

– **David Walmsley, Senior Leisure Analyst**

Generational Lifestyles - Canada

“With Canadians prioritizing the improvement of their financial base and mobile usage on the rise, companies should look to mobile apps to incentivise consumers by providing savings while they spend.”

– **Carol Wong-Li, Senior Lifestyle Analyst**

Healthy Eating Trends - Brazil

“There are opportunities to improve the positioning of healthy products. It could be very broad, if targeted at young people, but it could also serve a niche, such as for diet products. For functional products, it is important to highlight the promised benefits so that consumers can identify the suitable ...

Holiday Planning and Booking Process - UK

“The high level of price sensitivity exhibited by mobile bookers, coupled with an unwillingness to invest time in finding the best deals, suggests the growing popularity of mobile will be matched by an increased use of comparison sites such as Skyscanner and Trivago as well as accommodation booking sites such ...

Inbound Tourism - UK

“Whilst seafood operators have done much to ensure their sourcing is responsible and there is a healthy innovation pipeline, the two-a-week recommendation continues to be a key opportunity operators are yet to fully realise.”

– **Richard Ford, Senior Food and Drink Analyst**

Fruit Juice, Juice Drinks and Smoothies - UK

“Consumer concerns about the high sugar content of fruit juices and smoothies are reflected in the continuing decline in volume sales. However, the openness among consumers to steps that would reduce the sugar content of such drinks suggests scope for the market to engage with health-conscious consumers.”

Hard Surface Cleaners - UK

“The convenience culture has had a big impact on the market for hard surface cleaners, with an increasing emphasis being placed on easier to use and time-saving products, as well as more convenient packaging. With an ageing population and increasing time pressures in people’s lives, convenient formats will continue to ...

Hispanic Consumers and Non-Alcoholic Beverages - US

“While Hispanics tend to stick to the beverages that they know and like, smaller brands trying to reach them may be able to create a potentially profitable and long-term relationship by investing time and effort to get to know them, establish a presence where they are, and invite them to ...

Household Surface Cleaners - US

“While consumers are as time-pressed as ever, housecleaning remains a priority, a task that can provide a sense of accomplishment or play an important role in protecting a family’s health. Opportunities exist for surface cleaners that help consumers clean their homes efficiently and safely.”

– **John Owen, Senior Household ...**

Innovations in Banking - US

“London’s success is a double-edged sword for UK inbound tourism, with little evidence that the rest of the UK is benefiting – yet one more contributor to the UK’s growing economic divide. Long-haul visitors who typically stay longer offer the best opportunities for tourism beyond London. A more joined up ...

Jeans - US

“The current jeans marketplace is tepid and challenged, as a broader athleisure trend is competing for consumers’ attention and wallets. This trend is expected to have some lasting power, so jeans retailers should be front-loading the innovation pipeline while considering unique, stand out marketing approaches to attract attention and stay ...

Juice and Juice Drinks - Canada

“Consumers decide what foods constitute a snack. Foods that can satisfy across more day parts should benefit from a growing propensity for snacking. Juice as a liquid snack can be leveraged within this growing meal occasion. Its liquid form makes it an easy to consume, easy to carry way of ...

Lifestage Marketing - US

“FS marketers continue to be challenged by the changing world of communication and the specific financial needs and demands of each generation. Collaborating closely with technology for quick and efficient communication as well as seamless and innovative product and service delivery could help the industry keep up with consumers.” ...

Marketing to Teens - China

“Brands will need to have a full understanding of teenagers’ attitudes and behaviour before they can effectively market to them. Knowing the multiple facets of today’s teenagers and seeing their key pursuits and needs are both important.”

– **Laurel Gu, Senior Research Analyst**

Movie Theaters - US

“Innovation comes in many forms, including products and services customers can see and internal changes that can improve operational efficiencies and profitability. While they may not be able to address everything at the same time, banks need to continue to push the innovation envelope, not only because that’s what their ...

Juice - China

“There is great market potential for vegetable juice to be positioned as a drink for mealtimes to fit busier lifestyles and a balanced nutrition intake needs of today’s consumers. Lack of differentiation on juice products has been a big challenge for most market players in China, and juice brands need ...

Juice, Juice Drinks and Smoothies - US

“Some 41% of adults say they are most likely to turn to products in the category for added nutrition, the most widely applicable among the leading uses named. Next to that, 40% seek good taste. The category would do well to focus on these attributes in order to expand consumption ...

Loyalty to Retailers - UK

“Whilst the consumer has long sought to be treated as an individual and not simply as a collective, there remains an opportunity for retailers to further tailor their offerings to their customers’ individual needs. Further development of digital technology, such as smartphone apps, is likely to make this more possible ...

Mortgages - Intermediary Focus - UK

“Although non-advised sales will now be uncommon, the threat that lenders will try to cut intermediaries out of the sales process remains. This is naturally something that the mortgage advisor community will need to keep an eye on and continue to seek ways in which they can offer added value ...

Non-carbonated Beverages - Ireland

“The movie theater industry is facing threats from all sides, with studios trying to shrink the exhibition window, consumers increasingly staying at home for their entertainment, and a new generation of moviegoers who expect entertainment content to be customizable and on-demand. Movie theaters can embrace the customization trend by tailoring ...

Payment Preferences - China

‘Although electronic payment methods are being adopted by some consumers, many remain cautious about using them. This is mainly due to worries about financial and data safety, and because people are still used to using cash or are just getting used to credit or debit cards. Electronic payment systems need ...

Pizza Restaurants - US

“With the popularity of pizza, the sky is the limit on how operators can keep their offerings interesting and relevant for customers. However, restaurants will need to keep in mind that traditional views of convenience and customization have changed, and instead, there has been a shift toward personalizing pies for ...

Premium and Mass Affluent Banking - UK

“While transactional banking is shifting towards digital channels, the desire for superior personal contact remains strong among the mass affluent segment. The nature of branches is changing and banks targeting the affluent market need to distinguish themselves by offering premium customer service at both branches and call centres in addition ...

Residential Care for the Elderly (Industrial Report) - UK

“Residential care is being provided in an environment where public opinion of the quality of provision is fragile and while social care in the UK is undergoing significant changes. In recent years, the industry has faced a number of challenges, including fee increases (whilst local authority contributions have declined, due ...

“Concern about sugar continues to grow, with half of Irish consumers worried about the sugar content of some juices. Moving forward this will likely see continued new products being launched containing natural sweeteners to appeal to concerned consumers.”

Pizza and Pasta Restaurants - UK

“There is room for pizza/pasta restaurants to improve the leisure experience of dining at their venues to make them both more relaxing and engaging. Adding more experiential factors to store layouts, for example, could help elevate the dining out occasion and distract consumers from focusing on the cost of ...

Poultry - US

“Consumers remain concerned about the safety of the poultry they purchase, though it is not impacting category sales. They value knowing where their poultry comes from and how it’s raised, creating opportunities for brands to educate them on their purchase, and eliminate confusion surrounding popular poultry claims.”

– Amanda ...

Private Medical Insurance - UK

“Penetration of private medical insurance is at an all-time low. Just 14% of consumers say that they are covered by an insurance policy. However, 40% of the adult population agree that ‘private medical insurance gives a standard of care that the NHS can’t match’, showing that people can see the ...

Shopping Trends - Brazil

“Brazilians seek variety when shopping, and very few stick to one single shopping avenue. They are supported by a very vast network of stores, including more than 80,400 supermarkets/hypermarkets and 505 shopping centers. Online buyers also have extensive choice, with more than 21,000 certified online shops”

– ...

Snacking Preferences of Black Consumers - US

"Despite the fact that Blacks are heavy snackers, there is very little advertising aimed at reaching this consumer. While the motivation for snacking may be consistent with other consumers, the types of snacks vary considerably when compared to other consumer groups. Given the health disparities among Blacks, very few companies ...

Stocks and Sauces - Ireland

"Reformulating stocks and sauces to produce low salt and sugar variants is likely to appeal to health-conscious Irish consumers and encourage more frequent usage, thus driving value growth in the market."

– **Sophie Dorbie, Research Analyst**

Suncare - UK

"The suncare category is largely dependent on the weather, and with a wet summer in 2014, the category is predicted to decline in value by 8%. This offers opportunities for brands to advertise in the winter or position products outside the summer season. Innovations in multi-functional products, as well as ...

Supermarkets: More Than Just Food Retailing - France

"Hypermarkets are performing better than their counterparts in the UK, but similar trends are visible in the market. Larger stores are growing more slowly than smaller ones. There is a recovery in shopping at the food specialists. There are, we think, two main factors. First, the development of online shopping ...

Supermarkets: More Than Just Food Retailing - Italy

"Italian retailing as a whole is, by Western European standards, dysfunctional, archaic and fragmented. Our findings in this report confirm that this remains the case within the grocery sector."

Solar Panels (Industrial Report) - UK

"The UK solar panels market saw a shift in focus from roof-top to large-scale ground mounted installations in 2013 and even more so in 2014. However, with policy changes coming into force in April 2015, activity over the coming years is set to centre around midscale buildingmounted, commercial and industrial ...

Sun Protection and Sunless Tanners - US

"Suncare brands are challenged to overcome the seasonal usage habits and price-driven mentality of category shoppers. Nonetheless, consumers are demanding convenience, performance, and natural ingredients from their sun protection products, creating opportunities for brands to increase usage and boost sales."

– **Shannon Romanowski, Senior Beauty and Personal Care Analyst**

Supermarkets: More Than Just Food Retailing - Europe

Mintel's European report series covers the 19 leading economies of Western Europe. In total these countries account for around 95% of all European retail sales, excluding Russia.

Supermarkets: More Than Just Food Retailing - Germany

"The biggest discounters, Aldi and Lidl, turned in strong growth in 2013, sources suggest. And this contributed to the major discounters as a whole gaining further share of the total food retail sector: in 2013, the six biggest discounters accounted for nearly 44% of all food retailers' sales."

Supermarkets: More Than Just Food Retailing - Spain

"The food retailing sector has been held back in recent years by the poor performance of many non-food categories, particular more discretionary items. Grocers' sales were just 2.6% higher in 2013 than they were in

2009. This compares very poorly with most other European markets – only Croatia, Greece ...

Supermarkets: More Than Just Food Retailing - UK

“Aldi and Lidl are wedded to the smaller-store, limited range, largely-own-brand offer. So there is limited scope for them to cater to shopper demand for a wider range or for more branded lines – and so to capture more main-shop customers.”

– John Mercer, European Retail Analyst

Tablet Computers - China

“To balance mobility and functionality, tablets, laptops and even smartphones are increasingly converging towards unity. Besides, software development is also crucial to the fate of tablets, as tablets are more of a content-driven modern device.”

– Can Huang, Senior Research Analyst

Tablets - US

“The tablet has already succeeded in becoming one of the most commonly owned pieces of consumer electronics. As the category continues to mature, manufacturers will need to focus on encouraging upgrades, holding on to price points, or making a clear case for multiple tablet ownership.”

– Billy Hulkower, Senior ...

Tendências de Compras - Brazil

“Os brasileiros buscam variedade ao fazer compras, e poucos fazem uso contínuo de um único estabelecimento comercial. Eles são incentivados por uma rede muito vasta de lojas, incluindo mais de 80.400 supermercados/hipermercados e 505 shopping centers. Compradores online também contam com ampla escolha, com mais de 21 mil ...

The Private Label Food Consumer - UK

“Own-label is largely absent in single-serve chocolate products, meaning that it is missing out on impulse

Table and Cookware - UK

“People have a chance with cooking and baking to be creative in their own homes. And by serving meals to friends they have an opportunity to treat their friends as well as demonstrate their knowledge of and ability with food. Cooking has gone beyond something we must do, to become ...

Tablet Computers - UK

“Because of the casual nature of tablet usage, with devices popular in front of the TV or for brief gaming sessions, it is likely that once household penetration reaches around the 75% mark, growth in sales will almost stall, driven forward thereafter only by intermittent replacement purchases, or by smaller ...

Televisions - UK

“Brands must hold their nerve and resist the urge to discount 4K TVs heavily in 2015, following the commoditisation of smart and 3DTVs – technologies that no longer command a significant premium.

Thailand Outbound - Thailand

“Thailand’s outbound market is markedly smaller than that of its more developed neighbours such as Malaysia and Singapore. Nonetheless, it is gradually becoming an important market for various tourist destinations, as the number of middle- and upper-class Thais continues to grow. The political and economic setbacks that have plagued the ...

Tires - US

“The US tires market struggles to remain relevant to most consumers, and younger consumers in particular. This pattern of disregard for tires contributes to a vicious cycle in which tires of younger drivers need to be

buying for on-the-go and out-of-home occasions – a key snacking occasion – indicating this as a potential area for own-label growth.”

– **Emma Clifford, Senior Food Analyst**

Travel and Tourism - Argentina

“Some of the South American tourists who come to Argentina stay in modest accommodations or with family and friends, but interestingly, Brazilians are the exception. In 2012, according to MINTUR, almost 60% of inbound travellers from Brazil stayed in four- and five-star hotels, compared to 43% of North Americans and ...

Travel and Tourism - Colombia

“Colombia is undergoing a significant transformation as a tourism destination. With a rapidly growing local economy and considerable investment in local transport, tourism is well positioned to benefit from the changes that are taking place in the country. Peace and security are required for tourism to flourish, and Colombia today ...

Travel and Tourism - Peru

“Peru’s stunning cultural heritage and spectacular natural environment supports a vast range of outdoor activities, which gives the country a well-deserved reputation as one of the world’s leading adventure destinations. However, key to long-term sustainability as a world-class destination will be the successful diversification away from the overcrowded Machu Picchu ...

UK Retail Briefing - UK

Each month Mintel’s UK Retail Briefing concentrates on a particular sector or market. This month’s focus is on electrical goods retailing.

Varejo de Produtos de Beleza - Brazil

replaced more frequently and their confidence in tire performance continues to dwindle. Tire manufacturers ...

Travel and Tourism - Chile

“The ‘Switzerland of South America’... is the most stable and successful country in the region, with great infrastructure, quality accommodation and services, and a sophisticated capital.”

Travel and Tourism - Paraguay

“Although tourism currently makes a small contribution to the economy, the Paraguayan government has identified it as a sector with significant potential. In recent years, tourism development has been governed by the goals and principles of the Tourism Master Plan 2008-18, which was updated in 2012.”

Travel and Tourism - Uruguay

“The tourism industry has come a long way since 1954, when, according to the Ministry of Tourism and Sport, Uruguay attracted a mere 37,405 foreign tourists. In the late 1970s, when tourism took off (courtesy of Frank Sinatra and other Hollywood celebrities who started frequenting Punta del Este, a ...

Underground Pipes (Industrial Report) - UK

“The separate aspects of the underground pipes market are subject to very different influences, including the long-term spending plans of utilities, where years of under investment continues to be addressed; the highly variable construction market, which tends to exaggerate overall economic vagaries; and political policy and public spending activity. These ...

Video Games and Consoles - UK

“O mercado brasileiro de produtos de beleza é caracterizado por vendas multicanal. O sistema de vendas porta a porta continua sendo um importante canal neste setor, mas enfrenta forte concorrência da internet. O desafio para as empresas que operam no sistema de vendas diretas é manter um balanço entre as ...

Water Filtration - US

“Water filtration market sales are struggling, with further declines expected in the coming years. Companies will need to address the issue of filter replacement, convince consumers that these products are essential, and better engage Asian, Hispanic, and Black consumers to reinvigorate the category.”

– Gabriela Elani, Home & Personal ...

Wilderness Tourism - Europe

“Wilderness tourism is becoming increasingly sought after, as the world’s mountains, deserts and forests entice growing numbers of adventure tourists who are attracted to pristine landscapes, wild lands and uninhabited areas in order to enjoy a truly unique experience.”

- Jessica Rawlinson - Senior Tourism Analyst

咖啡店 - China

“中国消费者对咖啡店的使用情况和态度错综复杂，无法预测。特别关键的一点是，咖啡品质和独特店内氛围之间需达成平衡，从而实现多功能的目的。简而言之，对于中国的咖啡店而言，毫无疑问，咖啡店经营者意识到消费者对快速休闲咖啡厅方式，如家一般温馨的咖啡厅设计或多方合作推出的创意理念的渴望，并以此充分发挥创造性是极其重要的。”

– 刘欣琪，研究分析师

平板电脑 - China

“为了平衡移动和功能，平板电脑、笔记本电脑，甚至智能手机日益融合。此外，由于平板电脑主要为内容驱动型设备，所以软件开发也与平板电脑的命运息息相关。”

果汁 - China

“More prominent marketing focusing on the enormous variety of casual, tablet and smartphone-style Indie games available on new generation consoles may convince older female consumers that there is content on the system relevant to their interests as well. On a more macro scale, the persistent gender-related issues in the industry ...

White Spirits - US

“With flavored vodkas reaching a virtual saturation point, the time could be right for the addition of unique flavors into other white spirits. Consumer research shows interest in flavored versions of rums and tequilas, and manufacturers could capitalize on that interest, while also maximizing awareness and usage of existing flavored ...

Wine - China

“The abrupt shift in the wine market - with volume and average prices going down - seemed unimaginable when premium wines were seeing their retail values sky rocket. However, the sharp decline in importing and domestic production shows that the bubble is finally bursting. However, this is far from a disaster for ...

婴幼儿护理产品 - China

“中国的婴幼儿护理市场是极具挑战性的市场，不仅对本土企业如此，对跨国企业也越发如此。品牌和产品产地已经不再是产品安全性和质量的唯一判断标准。生产商需要适应当前这样一个互联的市场，通过产品 and 市场沟通来说服妈妈们购买。”

支付方式喜好 - China

“在线支付和移动支付市场依然很年轻，但越来越多的人将迅速注意到移动支付系统的便利性，并克服当下的却步不前。这将给主要的零售银行带来挑战，给在线支付服务提供商带来机会，尽管该市场已经变得十分拥挤了。

葡萄酒 - China

“为适应更忙碌的生活方式和满足当前消费者的均衡营养摄取所需，定位蔬菜汁为就餐时的饮料将为品牌带来巨大的市场潜力。果蔬汁产品缺乏差异化是中国大多数生产商们面临的巨大挑战，果蔬汁品牌需要学会如何创立独特的品牌个性以求脱颖而出。”

— 邱昊、研究分析师

“一改过去高端葡萄酒市场零售额持续迅猛增长的态势，如今量价齐跌的巨变令市场措手不及，难以应对。然而，葡萄酒进口量和国内产量的骤降显示该市场泡沫终于开始破裂。对于葡萄酒市场而言，这并非一场灾难：回归大众消费市场是该市场发展的核心推动力。”

— 张一，高级研究分析师

针对青少年的市场营销 - China

“青少年正处于从父母娇宠的‘小皇帝’向担负起生活中各方面责任的转型过程中，例如，他们都需要适当地管理自己的零用钱，用以承担日常生活开支，而年龄偏大的青少年——大专和大学在校生——正积极地谋划未来职业发展，甚至准备开始担负起家庭责任。”