

**March 2016**

## 婴幼儿纸尿裤和湿巾 - China

“为了在中国婴幼儿纸尿裤市场中不断提升竞争力，公司和品牌应该优先关注产品质量，这是因为这个产品特色是鼓励消费者转换品牌的头号原因。在所有因素当中，婴幼儿纸尿裤的透气性是妈妈最主要的顾虑。同时，专为特定场合使用的婴儿湿巾也是值得重点投资的领域。”

— 李宇静，高级研究分析师

## Air Care - US

"After struggling in recent years, the air care market posted stronger gains in 2015 reflected in growth across all segments. Opportunities exist to engage adults by expanding claims beyond scent, focusing on natural or environmentally friendly options as well as health and wellness benefits. A focus on innovative formats may ...

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

"The babies' and children's nappies and wipes market continues to see sales declines as parents switch to discounters for cheaper purchases. While branded innovation returns in 2015, the slowing birth rate means the market is not expected to return to growth. Babies' and children's personal care products have fared better ...

## Bicycles - UK

"Participation among women has grown much faster than that among men but it is still significantly lower and there is considerable potential for developing the frequency with which women ride."

— Michael Oliver – Senior Leisure and Media Analyst

## Biscuits, Cookies and Crackers - UK

## Absorventes e Produtos de Higiene Íntima Feminina - Brazil

“As consumidoras brasileiras gostam de se sentir limpas, e com os absorventes e produtos de higiene íntima feminina não é diferente. Dentre as preocupações citadas por elas, estão possíveis vazamentos, possíveis problemas para a saúde e produtos que não sejam higiênicos. As marcas têm, portanto, alguns desafios para atrair essas ...

## Attitudes toward Private Label - China

"Private label has a minor presence in China. Overall, the share of private label innovation stayed flat at 3-4% between 2011 and 2014, while in some European countries this figure is a lot more significant. For example, Spain (40.5%), the UK (31.4%), France (30.9%) and Germany (27 ...

## Beauty Retailing - China

"In China, where national expansion of physical stores is diminishing, mobile is becoming the battlefield for beauty retailers. There is an enormous amount of mobile-centric innovation intensifying competition for consumers' wallets and the O2O movement will continue to boom in order to provide an omni-channel experience.

## Biscuits, Cookies and Crackers - China

"Their convenience and filling nature enable biscuits to be competitive within the breakfast occasion. Breakfast biscuits should focus on taste and nutritional richness. Consumers are drawn to breakfast biscuits with coatings/fillings and nuts/fruits bits. Snack-like biscuits could take bold steps in flavour, colour and shape innovation."

## Black Consumers' Diet and Wellness - US

"While the majority of people are concerned about sugar, sales of sweet biscuits are holding up well. With consumers likely to become more focused on portion control due to concerns about sugar though, smaller-sized convenience products and mini packs that also cater better for on-the-go snacking are likely to become ...

## Bottled Water - China

"The current bottled water market is at a more sustainable stage driven by rapid expansion in the low end, with a volume sales advantage and a small high-end market with escalating growth and high profit margins. While low-end brands are competing on price, high-end brands are rivaling with premium associations ...

## Bundled Communications Services - UK

"By the end of 2016 each of the big four providers are expected to offer some form of quad-play bundle. The success of quad-play lies in convincing customers that having all of their services under one roof will be beneficial. Using customer data to create personalised deals and bundles could ...

## Carnes e Aves - Brazil

"Um desafio fundamental para o mercado é enfrentar a atual recessão econômica e a inflação elevada, fatores que fazem o consumidor comprar menos carnes e aves. Os brasileiros estão comendo a maioria dos tipos de carne e ave em menor quantidade e entre as principais razões para isso estão os ...

## Chocolate Confectionery - US

"Dollar sales of chocolate confectionery continued to grow in 2015, albeit at a tempered pace compared to previous years. The indulgence category has avoided steep losses, even as consumers place an increased importance on health."

## Commercial Banking and Finance - UK

"Black consumers are disproportionately impacted by certain health conditions and diseases, such as heart disease, diabetes, hypertension, and obesity. They have a very positive view of their overall health. At the same time, they admit they need help and turn to media for solutions, which presents an opportunity for marketers ...

## Bottled Water - UK

"Bottled water has enjoyed robust growth, benefiting as a low-cost option on the go while incomes were squeezed and boosted by good weather and its sugar-free credentials. The slow growth in real incomes should facilitate growth in spending. However, bottled water risks this prompting trading up to other drinks, highlighting ...

## Cakes and Cake Bars - UK

"Opportunities are ripe for operators to explore healthier formulations, with significant unmet demand for such products. In this context, superfood ingredients –including ancient grains, coconut oil and vegetables – can play an important role, tapping the current focus on 'positive nutrition'.

## Casinos and Bingo - UK

"New venue concepts in the casino and bingo club markets are set to play a key role in shaping the future of both."

– David Walmsley, Senior Leisure Analyst

## Cleaning the House - China

"Apart from concentrating on driving sales through encouraging more frequent usage of household cleaning products, brands should also focus on product development in products featuring creative packaging design and natural ingredients to add to value perceptions. Opportunities also exist for robotic electronic house cleaning products to cater for more sophisticated ...

## Consumer Snacking - UK

"As banks continue to retrench from regions or sectors where they are unable to meet specific demand and re-evaluate their operational strategies, they will need to rely on their personnel more and more to deliver evolving products and services."

– **Lewis Cone, B2B Analyst**

## Consumer Spending Priorities - China

"Although confidence levels remain high, the negative impact from the slowdown in the economy and the sluggish financial market is starting to affect spending behaviour. Consumers are optimistic in a cautious way; however the need for self-indulgence is driving growth of discretionary categories."

– **Gordon Gao, Senior Research Analyst**

## Convenience Store Foodservice - US

"The growth of ready-to-eat, grab-and-go, chef-prepared and fresh food-for-now offerings in the convenience store space is the result of increased consumer demand, along with improved quality and consumer perception of quality, more-and-better menu options, as well as implementation of emerging technologies that are simplifying and streamlining the ordering and payment ...

## Cooking Habits - Brazil

"With higher living costs, and lower incomes, Brazilians are expected to cook more often at home in order to save money. Health is still a priority for consumers, mainly those suffering from problems such as diabetes and hypertension. Companies could become allies of Brazilians, educating them to cook in a ...

## Dairy Milk - US

"The momentum dairy milk experienced in 2014 failed to continue in estimated 2015 as the category faced challenges from a surplus of milk, declining exports, declining consumer consumption, and strong competition from the non-dairy milk segment. Mintel forecast declines to continue through 2020; however, opportunities to calm future sales declines ...

"Snacking is almost universal. 95% of UK adults have snacked in December 2015, down from 97% a year prior. Usage is down in all categories bar savoury biscuits.

## Consumer Trends, Attitudes and Spending Habits on the Home - UK

"The UK's 27 million households spent £27.2 billion on buying for their homes in 2015. And when the housing market is buoyant, people spend more freely to create the homes they want. Owner-occupiers and those who feel that their finances are healthy are the most active group of purchasers ...

## Convenience Stores - US

"Convenience stores are a steady presence in most US consumers' lives and a significant \$450 billion business. With 82% of survey respondents stating that they have gone to a convenience store within the last three months, this channel is clearly an important platform for connecting with shoppers and making sales."

## Crackers - US

The crackers category reached \$7.7 billion in 2015, representing growth of 17% from 2010-15. Consumer interest in snacking, and perceptions of crackers as a healthier snack than other salty snacks helps boost category sales. However, in recent years sales have slowed, reflective of strong competition from other food categories ...

## Digital Advertising - UK

"The digital channel provides advertisers with a unique benefit that is difficult to replicate using other media formats – the ability to target a specific individual, with a specific message, at a specific time.

In order for the industry to maintain that advantage it is crucial that brands manage the ...

## Digital Trends - China

"Chinese consumers are open to purchasing and using digital products, and multifunctional digital products with enhanced features may be attractive to Chinese consumers. Smart TVs see the potential to grow in terms of both penetration and as a marketing channel. To attract visit, offline stores can leverage the power of ...

## European Retail Briefing - Europe

**This month ERB includes:**

## Feminine Hygiene and Sanitary Protection Products - UK

"The feminine hygiene and sanitary protection category has grown slowly and steadily in recent years, driven by the feminine hygiene and incontinence sectors. The category has seen a rise in recorded advertising expenditure, with recent campaigns focusing on empowerment as a theme, whilst NPD has also been increased, contributing to ...

## Fruit and Vegetables - Ireland

"The drive among Irish consumers to improve their diets and overall health has helped to boost the usage of fruit and vegetables in both NI and RoI – with produce dubbed as 'superfoods' seeing sales improve drastically during 2015. However, many consumers still struggle to reach their five-a-day, pointing to ...

## Golf Tourism Worldwide - International

"With 56 million golfers worldwide, golfing is one of the world's most popular sports. Golf tourism has grown strongly over the past four years and the signs are positive that this growth will endure as more destinations enter the market with new golfing products. However, there has been a steady ...

## Hábitos Culinários - Brazil

## Digital Trends Spring - UK

"Digital wallets still struggle to attract mainstream interest, but almost three quarters of those who use the technology do so almost every time they have the opportunity. This suggests that the service can actually offer compelling benefits to users, and that continued usage should naturally pick up if consumers are ...

## Family Holidays - UK

"In an age of fast-paced family life, 'relay parenting' and constant juggling of roles and responsibilities, where many households find it hard to find time even to sit down and eat together, holiday brands can position themselves as helping to provide precious spaces and opportunities for families to re-connect."

## Feminine Hygiene and Sanitary Protection Products - US

Growth of the overall feminine care products market has been marginal in recent years, as it faces several challenges. Women are having fewer, lighter periods, contributing to declining usage of sanitary protection, specifically tampons. However, an aging population and increased interest in cleansing products bodes well for the adult incontinence ...

## Gas Supply and Distribution - UK

"During the current control period RIIO-GD1 from 2013 to 2021, asset management and demand-side responses (working with consumers to reduce demand rather than increase generation) are likely to be the most significant areas of innovation, with smart technology expected to play a key role. Increased collaboration between network operators is ...

## Grocery Store Perimeter - Canada

"Rapidly rising food costs are impacting categories sold at the perimeter of the grocery store (fresh produce, dairy, fresh baked goods, fresh meat and seafood). Retailers must creatively find ways to reinforce 'freshness' and lessen consumer focus on price. Motivating consumers at specialty counters will mean reminding them of the ...

## Hard Surface Cleaning and Care Products - UK

“Com o custo de vida mais alto, e a renda mais baixa, os brasileiros tendem a aumentar a frequência com a qual cozinham em casa, a fim de economizar. Saúde ainda é uma prioridade para esses consumidores, principalmente os que sofrem de problemas como diabetes e hipertensão. As empresas podem ...

## Healthy Dining Trends - US

"The nature of health is shifting away from counting calories and moving towards a focus on holistic “wellness.” New restaurants are entering the market with an emphasis on natural, nutritious, and quick meals designed to attract diners stressed for time but wanting healthful meals. Restaurants must understand what motivates ...

## Home Communication Services - US

"The issues that face home TV, internet, phone, and security services are daunting. Pay TV service is on the decline with 25-34s, who are the least likely to subscribe, a trend indicative of the desirability of internet delivery of video in lieu of linear channels."

## International Food Trends - US

"Sales of international foods in the US are projected to grow moderately between 2015 and 2020, from \$12.2 billion to \$13.9 billion. Immigration and the increasingly multicultural nature of American society are factors that are influencing growth."

## Marketing to Young Adults - UK

"Whilst it may be possible to buy the attention of young adults in the short run, brands looking to foster long lasting relationships will need to look beyond price promotions and discounting. Hiring and rental services present a strong option for brands looking to engage with young adults, offering the ...

## Men's Clothing - US

"Sales of men's clothing are expected to increase over the next five years, and grow at a faster pace than women's clothing over the same period. Men aged 25-34 are key to the market due to their transitional life stage

"The hard surface cleaning and care market is in decline, a result of competitive pricing and consumers relying on fewer multipurpose products. In a particularly price-sensitive category brands can look to add value by demonstrating how their products can save consumers time and effort while maintaining crucial efficacy."

## Hispanics' Diet and Wellness - US

"Having a healthy lifestyle is important for Hispanics. More than half are proactive in terms of diet and exercise; however, since in general Hispanics feel they are healthy, the need for change may not be evident for all."

## Hotel Chain Strategy - International

"Brand proliferation is likely to continue as the big chains attempt to compete in each nook and cranny of the hotel market through offering a specifically tailored product. Consolidation will go forward in the current low interest rate environment as chains continue to feel the need to 'bulk up' as ...

## Kids as Influencers - US

"35 million US households include children younger than 18. The majority are headed by a married couple. Parenting trends allow for kids to have significant influence on household decisions – including purchases for the child individually as well as those for the whole family."

## Meat and Poultry - Brazil

"A key challenge for the market is the current economic crisis and high inflation, making meat and poultry products even more expensive for the Brazilian consumer. Consumers are eating less of most types of meat and poultry and one of the main reasons to cut back on consumption is high ...

## Menswear - UK

"Spend on clothing is increasingly competing with other areas such as leisure, with men showing a preference for spending their extra money on activities such as dining out and going out rather than on fashion. This means

as well as their relatively higher earnings (versus younger men ...

## Mobile Phones - US

"Growth in the mobile phones market has slowed down as smartphone ownership hits 80% of consumers. Brands are being pressured to maintain price competitiveness while continually innovating; much of this innovation will come from the software and content side of mobile phones, but there may be hardware-centric opportunities as next-generation ...

## Mortgages - UK

"As the population ages and many can only arrange a mortgage later in life, lenders must prepare to adapt to change in terms of market dynamics and customer profile. Removing barriers to purchase is set to characterise the market over the coming years."

– **Patrick Ross, Financial Services Analyst**

## Motor Insurance - UK

"After a period of falling premiums, 2015 saw a sizeable increase in GWP with evidence that further premium increases are likely in 2016. Although those in the industry are likely to welcome the opportunity to boost profits, drivers have become increasingly savvy in recent years when it comes to buying ...

## Online and Mobile Retailing - Ireland

"Despite showing strong a preference for having goods delivered to their homes, Irish consumers are interested in click-and-collect services, receiving goods at work and by drones. This is being driven by longer working hours and means retailers will need to be increasingly flexible to enable consumers to specify a delivery ...

## Packaged Red Meat - US

that clothing retailers will have to work harder than ever to encourage men ...

## Mortgages - Ireland

"Although the Irish mortgage market has re-established itself following the turmoil of the post-financial crisis and recession years, the value of outstanding mortgage lending is – perhaps surprisingly – in subtle decline. Although mortgage lending is increasing, it nonetheless trails the prevailing level of repayments."

**Brian O'Connor, Senior Consumer Analyst**

## Mortgages/Residential Mortgage Lending - Canada

"A current banking relationship is the most important choice factor for consumers when choosing a mortgage lender, underlying the importance of a strong branch network and motivated front-line staff to cross-sell mortgage products."

– **Sanjay Sharma, Senior Financial Services Analyst**

## Nappies and Baby Wipes - China

"To improve and enhance competitiveness in the China nappy market, companies and brands need to prioritise improving product quality since this product feature is the top driver for consumers' brand switch behaviour. Among all product factors, breathability of nappies is the key concern of mums. Meanwhile nappies and baby wipes ...

## Online Grocery Retailing - UK

"The online grocery market continues to grow in double digits but remains a niche market in terms of the wider grocery market. However, the shift away from superstores to more convenient shopping channels is certainly benefiting the market."

– **Nick Carroll, Retail Analyst**

## Pasta, Rice, Noodles and Starches - Canada

"Consumers are increasingly turning to non-traditional venues for their red meats, with parents notably likely to purchase red meat online, and Hispanic consumers turning to mass merchandisers for red meat."

## **Railway Engineering - UK**

"The government is not expected to get heavily involved in the procurement of future rolling stock for the existing railway, as has been the case with recent major orders for IEP, Thameslink and Crossrail. The stated government policy is for train operators and financiers to lead the planning and delivery ...

## **Residential Flooring - US**

"Things continue to look up for the residential flooring market, as a solid housing market and growing consumer confidence create conditions for increased spending on home renovations. The market has seen steady growth since 2011, but pent-up demand for home improvements remains and will help to drive growth going forward."

## **Schools, Universities and Hospitals - UK**

"Government policy and the need to restrict public spending overrides population demands, leading to very different influences than if the market was determined by demand expectations. The ageing population in the UK should be driving much greater expenditure in the health sector than schools and universities, where population projections are ...

## **Specialist Food and Drink Retailers - UK**

"The trend towards convenience shopping is driving footfall back into towns and cities where the specialists tend to be located, but with this comes additional competition from c-stores, discounters and online. While e-commerce isn't the answer for many specialists, increasing use of technology to engage with customers and improved convenience ...

## **Travel Money - UK**

"Paste, rice and noodles (PRN) enjoys near ubiquitous usage among Canadians. This, however, does not mean that the landscape is not changing. Pasta retail volume sales remained relatively steady between 2011 and 2015, while rice grew. As Canada's demographic mix changes, so too is what Canadians are eating."

## **Recycling - UK**

"Demanding international economic conditions and changing import policies have had a negative impact on UK companies operating in the recycling industry. Lower demand from key China and EU markets has had the greatest impact, suggesting that companies working to create a balanced customer base to spread risk will be better ...

## **Sanitary Protection and Feminine Hygiene Products - Brazil**

"Brazilian women like to feel clean, and the same is true regarding sanitary protection and feminine hygiene products. Among the concerns related to this sector mentioned by them are leakages, possible health problems, and unhygienic products. Brands therefore have some challenges to attract these consumers, developing innovative products that can ...

## **Social Media in Tourism - International**

"Social media has profoundly changed how people research and plan trips and how they share travel experiences. It is used at various points during the travel lifecycle, but the extent to which it is used is shaped by different factors."

## **The Beauty Consumer - US**

"The beauty category showed positive growth from 2010-15 and is projected to see continued gains. Looking forward, key demographic groups include Millennials and Hispanics. Nurturing and expanding the Beauty Enthusiasts segment will also be important for product and market growth. Capitalizing on Enthusiasts' interest in experimentation, trends, free samples, and ...

## **UK Retail Briefing - UK**

“With the holiday market growing and strong forecasts for overseas expenditure, the travel money market has a positive outlook. However, the commoditisation of the sector and consumers’ continued pursuit of value for money makes it a challenge for brands to maintain market share if they don’t keep up the best ...

## Unsecured Loans - US

“As with other areas of financial services, technology is bringing about radical change in the unsecured lending arena. P2P (peer-to-peer) lenders are challenging traditional lenders with their lower interest rates, online capabilities, and easy access to funds. The target markets for P2P lenders are the segments all lenders want most ...

## 对自有品牌的态度 - China

“中国自有品牌产品不多。总的来说，自有品牌在2011-2014年创新力度不大，仅为3-4%，而这一数据在某些欧洲国家明显更高。例如，2015年，西班牙（40.5%）、英国（31.4%）、法国（30.9%）和德国（27.2%）的自有品牌产品创新均如火如荼。

## 消费热点研究 - China

“尽管消费者信心指数依旧保持高位，但经济增速放缓以及金融市场发展不景气所带来的负面影响已渐渐影响他们的消费行为。目前，消费者态度谨慎却乐观。自我享受的需求拉动了非必需品品类市场的发展。”

## 美容零售 - China

“在中国，实体店在全国范围的扩张脚步逐渐放缓，移动平台成为美容零售商角逐的新战场。大量移动端创新应运而生，加剧市场竞争，消费者抢夺战一触即发；O2O营销将继续蓬勃发展，从而带来无缝多渠道购物体验。

Each month Mintel’s UK Retail Briefing concentrates on a particular sector or market. This month, we look at clothing and footwear specialists.

## 家居清洁 - China

这份报告将帮助您发掘机会，了解影响您所处市场的关键因素。我们可以让您即时获取市场分析和建设性意见。报告还将通过提供新颖的观点激发您的思维过程，从而挑战您的常规思维。

## 数码趋势 - China

“中国消费者热衷于购买和使用数码产品，增强型多功能数码产品可能会更吸引他们。智能电视在渗透和使用频率方面的增长潜力巨大。线下实体店可以利用虚拟现实（VR）和增强现实（AR）等科技力量来吸引消费者光顾。”

— 徐天韵，高级研究分析师

## 瓶装水 - China

“瓶装水市场目前处于发展相对平稳阶段，主要得益于以下几方面：以销量取胜的低端市场快速扩张，高端市场尽管较小，但增长迅猛、利润空间巨大。低端品牌大打价格战，而高端品牌在优质水源和包装等高端属性方面展开激烈竞争。尽管消费者仍然主要愿意去超市等线下渠道购买瓶装水，但还没有进入电商领域的公司和品牌将会错过很多商业机会。随着收入的不断提高和污染的持续恶化，消费者更有可能进行趋优购买。重点企业需要根据消费者的需求和角度来进行高端瓶装水营销，而不是着眼于公司和品牌的前景。”

— 李蕾，研究分析师

## 饼干 - China

“饼干食用便捷、适合充饥的特色使其在早餐场合别具竞争力。早餐饼干品牌应该关注美味和营养。消费者喜爱有夹心/涂层以及添加谷物/坚果颗粒的早餐饼干。主打零食类饼干的品种可以敢于尝试口味、颜色和形状创新。搭配食用的方式能够为消费者带来风味融合的体验，进而克服饼干口感过干的问题。”