

**January 2014**

## **Agricultural Machinery (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.

## **Beauty Retailing - Europe**

Beauty Retailing – Europe provides detailed coverage of the beauty retail sectors in five Western European markets: the UK, France, Germany, Italy and Spain. The data in its entirety is contained in the single copy five-country report, which gives a full overview of beauty retailing in these markets. Single country ...

## **Beauty Retailing - Germany**

Beauty Retailing – Europe provides detailed coverage of the beauty retail sectors in five Western European markets: the UK, France, Germany, Italy and Spain. The data in its entirety is contained in the single copy five-country report, which gives a full overview of beauty retailing in these markets. Single country ...

## **Beauty Retailing - Spain**

Beauty Retailing – Europe provides detailed coverage of the beauty retail sectors in five Western European markets: the UK, France, Germany, Italy and Spain. The data in its entirety is contained in the single copy five-country report, which gives a full overview of beauty retailing in these markets. Single country ...

## **Black and Hispanic Moms - US**

“While there are a lot of similarities between these moms, they are different in many ways. Their culture and heritage is an important part of who they are and they are looking to maintain it, especially younger moms (18-34 years old). It’s likely that they have a heightened sensitivity toward ...

## **Bundled Communications Services - UK**

## **Back-to-School Shopping - US**

“While the still-recovering economy means consumers remain cautious and price sensitive, parents still have to budget to accommodate purchases in the BTS space. Many school supplies are necessary for a successful school year and others can be considered an investment for the future. However, recent innovations in mobile technology have ...

## **Beauty Retailing - France**

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## **Beauty Retailing - Italy**

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## **Beauty Retailing - UK**

“With consumers ever keener to secure the best deals, retailers would do well to find new ways to bolster customer loyalty. Following the lead of food retailers and introducing a Price Matching scheme could be one way to encourage loyalty by deepening trust. Giving customers a feeling of control over ...

## **Breakfast Restaurant Trends - US**

“There exists great potential for limited service restaurants to ramp up breakfast sales by understanding consumer needs and adapting their offerings. Operators can expand their breakfast hours as well as retool menu items to include BFY, portable, and innovative offerings. Additionally, operators must work to provide consumers with non-menu benefits ...

## **Canadian Banks and Credit Unions - Canada**

“The other method of decreasing churn is to convince consumers to take up as many products as possible from a single firm. The “stickier” consumers become, the harder they find it to extricate themselves from the company. Mintel’s research shows that quad-play customers tend to pay less per month than ...

## Canadian Savings and Investing - Canada

“As their national economy continues to struggle, Canadians are changing their priorities in order to improve their financial standing. Saving money and eliminating debt are increasingly important, and institutions with the best tools to help people achieve their goals will come out ahead. However, firms can’t forget that the ‘personal ...

## Cider - UK

“There are strong signs of longevity in the flavoured cider segment and, with 49% of cider drinkers being interested in flavoured ciders with unusual ingredients, new flavours could help it to retain momentum.”

## Consumer Snacking - UK

“More than a quarter (26%) of users eat snacks when in need of an energy boost and keeping energy levels up is important to around half of snackers. While various breakfast biscuit brands have made energy provision a central part of their positioning, this proposition remains rare in the wider ...

## Crisps, Nuts and Corn Snacks - Ireland

“With links between diet and health becoming increasingly prominent, Irish crisp and snack brands should look to engage in NPD to produce a range of ‘better for you’ snacks, particularly using non-potato sources such as grains and production methods such as baked and high temperature and pressure (popped chips). Experimenting ...

“Canadians are very loyal to their banks, but quite consistently have accounts at other institutions, which indicates that there are opportunities for institutions with the primary relationship to increase cross-sell efforts. One way to do this is by offering enhanced mobile banking features, since Canadians have yet to adopt mobile ...

## Chips, Popcorn, Nuts, and Dips - US

“The salty snacks category will continue to benefit from the anytime, anywhere snacking mentality. Changing product preferences, combined with shifting US demographics, will be top of mind for manufacturers. However, the real challenge will be addressing concerns about the nutritional content of snacks, while still allowing consumers the chance to ...

## Construction (Industrial Report) - UK

“The prospects for the UK construction sector are now very strong. There is no doubt that conditions are now right for growth in a sector that has suffered more than most in the past few years, but equally outperforms average growth when market conditions are positive. There continues to be ...

## Consumers, Saving and Investing - UK

“Consumers generally prefer to take a long-term approach to their savings and investments. They want to secure a competitive rate but don’t want to have to spend time moving their money about on a regular basis or keeping track of when bonus rates are due to run out.”

## Crisps, Salty Snacks and Nuts - UK

“Tesco’s high-tech Watford store, which opened in August 2013, is relatively unusual in that it features a fridge of chilled dips in the crisp aisle. It is something which other stores may be tempted to replicate considering the large minority (44%) of crisp users note that more supermarkets should offer ...

## Culture and Heritage Tourism - Ireland

"As an increasing number of Irish and overseas visitors use smartphones and tablets, culture and heritage sites in NI and RoI that integrate augmented reality smartphone apps that enable consumers to experience the sights and sounds of events from the past, could help to enhance the 'edutainment' value of their ...

## Deodorants and Bodysprays - UK

"This is a category where brand name prevails and own-label is held with scepticism. With long-lasting being the most important product attribute, consumers are more trusting of brands to deliver long-lasting protection. However, products not lasting as long as they claim to is the biggest product frustration, suggesting that using ...

## Ethnic Foods - US

"Authenticity appears as more of a value-add than a requirement for purchase of products used in home ethnic food preparation. While nearly half (47%) of ethnic food consumers say they are willing to spend more on authentic ethnic/international food, only one quarter say authenticity claims are a leading factor ...

## Fashion Accessories - UK

"Consumers aged 25-34 are starting to dominate fashion accessories purchases, so retailers need to make sure that their products and retail offering meet their needs. This growing demographic are strongly influenced by new trends and show the most interest in purchasing accessories online, highlighting the growth potential for the online ...

## Foundations (Industrial Report) - UK

"All the factors are now in place for the foundations sector to see strong growth over the next few years following a difficult period when the economic downturn and flat economy impacts the construction market, a situation that was exacerbated by the major Olympic games projects falling out of the market. The civil engineering industry is now in a ...

## Deodorants and Antiperspirants - US

"The APDO market is expected to grow steadily into 2018. However, the market does face some challenges that it will need to address. Companies and brands will have to determine ways of achieving incremental sales, reinvigorate sales of the struggling women's APDO product segment, and address the needs of teens ...

## Dining Out: A 2014 Look Ahead - US

"Price value matters to consumers, whether it comes in the form of coupons, meal deals, LTO discounts, or rewards program paybacks. Since women are more value conscious than men, this should provide direction for restaurants that want to cater to women, who often also are in charge of making sure ...

## European Retail Briefing - Europe

The European retail briefing provides commentary, data and news analysis from across Europe ensuring that you keep in contact with the latest retail news.

## Fleet Services (Industrial Report) - UK

"Strong residual values and improved economic conditions in 2013 imbued fleet managers with a greater sense of confidence in the recovery than before and this was manifest as replacement cycles appeared to dip with the age of used fleet cars sold falling through the year."

## Holiday Review - UK

"Demand for financial protection against unforeseen circumstances has been a key driver behind in-store sales, so reforms that grant similar protection to dynamic online bundles will likely accelerate the shift to online. PTD (Package Travel Directive) reform should also see the long-term shift towards independent bookings resume, a trend that ...

## Homewares - UK

“In a market flooded with low-priced goods, retailers face a steep challenge to encourage people to trade up and spend more. We expect to see more investment in exclusive brands and designs as retailers strive to differentiate themselves from competitors including online discounters. And retailers will continue to make more ...

## Household Care Packaging Trends - US

“Innovations in packaging and product form that simplify everyday household chores stand a good chance of capturing the attention of category shoppers. Results, however, are just as important as convenience.”

## Hybrid and Electric Cars - US

“The hybrid and electric car market is growing at breakneck speeds, but there’s some concern that this is mostly driven by government distortions, vis-à-vis the new CAFE program and by the California Air Resources Board. Without robust market demand, this segment, particularly plug-in hybrids and all-electric vehicles, remains at ...

## Marketing to Baby Boomers - US

“Marketing to Baby Boomers is rooted in the quality of the product or service being advertised. Boomers may take notice of product messaging (though they might not want to admit they are influenced by something so prosaic as direct marketing and TV ads), but if products don’t deliver on their ...

## Media Consumption Habits - China

“Owing to the urbanisation and the growing coverage of broadband service in China, digital media are widely accepted by Chinese consumers. With the general willingness of paying more for high-quality and personalised digital media, this opens up an opportunity of offering tier-based premium services for some digital media.”

## Household Care Packaging Trends - UK

“Packaging is central to both how household care products are used and how they communicate their benefits to consumers, and the latter includes the promotion of technologies and solutions that encourage greener behaviour. Younger people are particularly likely to voice green or ethical sentiments but not act upon these beliefs ...

## Household Paper Products - China

“Learning from product innovation in both domestic and overseas household paper markets could help household paper companies to effectively identify gaps in the market and turn unmet needs into concrete business profits.”

## Lifestyles of the Over-55s and Seniors - UK

“Even though the majority of the over-55s are retired, their household wealth (eg value of property and other financial investments) continues appreciating, providing a buffer in tough economic times. This means that today’s over-55s have largely weathered the downturn much better than younger generations, and the health of their finances ...

## Marketing to Consumers in their 20s - China

“The rising cost of living, particularly within the larger cities, has only served to contribute to the financial pressure on the twentysomethings. As a result, many have yet to break free from the parental home and find their own financial independence, or to appreciate the importance of balancing spending between ...

## Menu Flavours - UK

“One in 10 diners agree they actively look for dishes in restaurants that they have read or heard about (eg in magazines/TV), rising to 19% amongst Londoners. This illustrates the significance of headline grabbing products and dishes in today’s fast moving eating out market.”

## **Nail Color and Care - US**

“The nail category has typically focused on appealing to young women with new products that are trend-driven and encourage experimentation in order to drive growth and generate enthusiasm. Going forward, the category may want to better align with the needs of older and multicultural women while also introducing tools to ...

## **Nutritional and Performance Drinks - US**

“Functional claims are expanding across food and drink categories, as brands seek to differentiate themselves from the competition. The nutritional and performance drinks market should promote the fact that its products are engineered specifically for the functionality they promote, unlike other products for which claims such as protein delivery and ...

## **Personal Loans - UK**

“Consumers want to take control of their borrowing from the application process to the repayment of the loan. Loan providers will face a challenge to meet this demand for flexibility while still supporting those needing a more structured approach.”

## **Plant Protein Drinks - China**

“The emphasis on health benefits and natural ingredients, wider distribution points and broadening occasions for usage could encourage consumer engagement and drive the plant protein drinks market forward.”

## **Saving Habits - China**

“The pressure to save money and improve financial status is still paramount for Chinese consumers. It is driven by both the desire to provide a comfortable long-term future, as well as the ability to meet the various big spending occasions associated with their life aspirations. This provides a major market ...

## **Non-Alcoholic Beverages Occasions - US**

“Many beverages are pigeonholed to a degree by the times of day at which they are most commonly used. Brands could increase consumption frequency by positioning their products as suitable for a wider range of occasions and locations, such as milk with meals or juice drinks instead of sports drinks ...

## **Pensions - Intermediary Focus - UK**

“Many companies offer their employees the opportunity to enrol in some form of pension scheme, but relatively few back this up with the supply of financial advice or education. The closer ties advisers are developing with employers due to pension auto-enrolment provide a significant opportunity to work with companies to ...

## **Pharmaceuticals: The Consumer - US**

“The patent cliff, as well as a push toward consumers being more proactive about their health, has contributed to a decline in sales of pharmaceutical drugs. However, the ACA will provide more people with health insurance coverage, likely growing the market of prescription drug users.”

## **Salty Snacks - China**

“Manufacturers might consider adopting a multi-brand strategy to meet the demand for different types of snacking food from different consumer segments – depending on their respective attitudes towards salty snacks – so as to more effectively expand both business scope and consumer reach.”

## **Savings - Ireland**

“Although the appetite to save is clearly evident among Irish consumers, there are practical and motivational barriers to increased savings behaviour by consumers. Some simply cannot afford to save, while others have little option but to prioritise personal debt reduction. Furthermore, with increased taxation on interest earned, alongside interest rates ...

## Streaming Media: Music - US

“At \$1.5 billion in advertising and subscription sales, the total revenue for the US streaming music market is small, and with high costs for music licensing, market leader Pandora has yet to show two consecutive quarters of profitability. In spite of these issues, leading tech companies are flocking to ...

## The Drug Store Shopper - US

“Drug stores continue to live in danger of losing core market sales to mass merchandisers and supermarkets both OTC products and pharmacy services. Maximizing their position as a local retailer, creating laser focus on customer service, and continuing to develop a closely integrated online/offline service offering should be high ...

## UK Retail Briefing - UK

Each month Mintel's UK Retail Briefing concentrates on a particular sector or market. This month's focus is on food retailing and we look in particular at the Christmas shopping period.

## 咸味休闲食品 - China

“中国咸味零食市场预计未来五年仍将继续增长。除了满足消费者对口味和自我享受的需求，制造商还需要在产品创新和品牌营销中考虑消费者日益提高的健康意识和安全担忧，以增加业务规模 and 市场份额。”

## 家用纸制品 - China

过去五年，生活用纸市场，尤其是面巾纸和厨房纸巾品类，强劲增长。受日益提高的可支配收入、城市化进程的快速推进和更注重个人卫生的中产阶级的崛起所驱动，这一增长势头有望持续。此外，政府外部监管和现代零售渠道的拓展也带来增长机遇，因预计需求上扬，市场领导者开始着手扩大产能。

## 消费者储蓄习惯 - China

众所周知，中国人有着存钱的习惯。截至2013年年底，中国家庭储蓄总额达到了46.5万亿元人民币，相当于人均

## The Arts and Crafts Consumer - US

“There is a core audience of arts and crafts consumers, generally women aged 18-34. Yet marketers have plentiful opportunities to attract new audiences. Parents, younger men, unskilled crafters and consumers selling arts and crafts online are just some examples. Marketers can engage with and increase their share of consumers by ...

## TV Peripherals - UK

“The battleground for Blu-ray has now widened beyond the fight to see off DVD, as manufacturers of disc players have to compete against digital formats which have significantly grown in popularity in recent years. ‘All you can eat’ style streaming services offer an unlimited number of streams for a monthly ...

## World Cuisines - UK

“Some ethnic food brands may benefit from positioning their products specifically as child- or family-friendly. Cooking pastes, for instance, could more actively promote how they are a suitable option for the whole family, allowing for heat levels tailored to taste.”

## 媒体消费习惯 - China

随着中国城市化进程的推进和宽带覆盖范围的扩大，数字媒体已被中国消费者广泛接受；近九成消费者认为数字媒体比传统媒体更快捷方便。由于消费者普遍愿意为高质量、个性化的数字媒体支付溢价，所以这为媒体企业提供分级的付费数字媒体服务创造了机遇。

## 植物蛋白饮料 - China

植物蛋白饮料被认为是更安全、天然、健康的动物乳品替代品，部分原因是患有乳糖不耐受症的中国人较多，另一个原因是2008年的奶粉安全事件。借力于整个饮料市场增长的大趋势，植物蛋白饮料自2008年以来享有高达18.1%左右的年均复合增长率(CAGR)，但是预计随后五年内CAGR将降低到10.4%。

## 针对20多岁年轻消费者的营销 - China

由于中国幅员辽阔，不同地区的经济发展程度不同，所以20多岁年轻消费者很多元，不得将其视为单一的消费群。中国不同地区的多样性，使得中国的20多岁年轻消



约34,000元人民币的储蓄水平，超过了一年的人均可支配收入。

费者与其他国家的20多岁年轻消费者截然不同。然而，中国的20多岁年轻消费者与全球各地同年龄的消费者的共同点是擅长高科技：他们都接触到了高科技产品、电子产品和无线网路，借助网路更加了解世界。