

## September 2013

### Air Fresheners - UK

“Sales of air fresheners could be boosted in a number of ways, including focusing more on room specific products, the elimination of specific cooking or food smells or the provision of added functional benefits to boost health and wellness. Brand loyalty and engagement could be increased through encouraging the testing ...

### Airlines - China

“China represents a market with both big opportunities and challenges for the airline business. As growth and competition increase at the same time, airlines need to react by being more customer-oriented in terms of service, marketing as well as product design.”

### Black Consumers' Attitudes toward Car Buying - US

“Black car buyers are both aspirational and cash conscious, with an eye on finding a vehicle that will express their personality. While black car buyers say they are keen on selecting a model based on previous experiences, more black respondents say that they plan their next purchase to be a ...

### Bread - US

“Some 81% of bread users utilize products in the category as part of a sandwich or wrap, this is more than double that of any other use. The industry should play to its strengths, expanding offerings that allow for sandwich experimentation. At the same time, introducing new formats and flavors ...

### Cheese - Brazil

“The cheese category in Brazil enjoys high penetration. However, this is mainly more traditional types of cheese, such as mozzarella. In addition to price this difference in consumption is due to the lack of awareness among consumers of special types of cheese; however, this situation can be overturned with tasting ...

### Air Fresheners - US

“Air fresheners are widely used in American households and the market is growing and recovering from the recession. However, there are some challenges. Plug-in and battery-operated product sales are struggling, there is growing concern around chemical content that is used in air fresheners, and companies have to look to new ...

### Baby Durables - US

“There are many factors impacting the market for baby durables. The rising birthrate in the U.S. and shifting parent and family dynamics are likely to affect purchasing in this category. Most parents are likely to buy new items when purchasing baby durables; however there is a notable interest in ...

### Books and e-books - UK

“The UK consumer market for books and e-books is expected, for the first time in many years, to show an increase in value in 2013, as a result of the boost to sales which has been provided by the growth in sales of e-books. This growth has more than compensated ...

### Bread and Baked Goods - UK

“While consumers' demand for variety highlights the potential for brands to benefit from continuing to develop their alternative baked goods offering, it represents a call to action for manufacturers not yet active in this segment to move into it.”

### Coffee - US

“Variety has fueled growth and led to a boost in sales for coffee manufacturers. However, Mintel research finds that many new products have yet to interrupt consumers' everyday coffee rituals, namely, a cup of roasted ground coffee prepared in a standard drip coffee maker. Manufacturers must find ways to introduce ...

## Colour Cosmetics - China

“As income increases and basic life quality improves significantly, Chinese women could be expected to spend more on discretionary goods like colour cosmetics. This suggests that there is great opportunity to convert millions of non-users in the lower tier cities and rural areas. At the same time, the country’s middle ...

## Consumers and Pension Auto-Enrolment - UK

“The true test of auto-enrolment is how SMEs handle the administration of schemes as they approach their staging dates. There are expectations that opt-out rates will be higher amongst these smaller employers, and that the employers themselves will be ill prepared to deal with the implementation of the scheme.”

## Credit Cards - UK

“Contactless credit cards present an opportunity for providers to encourage customers to use their cards more frequently. Ownership and usage of these cards remains relatively low, however. Going forward, providers can develop the link between the rewards customers receive and contactless technology. This should help to demonstrate that using cards ...

## Digital Trends Autumn - UK

This report examines the trends in consumer technology and digital media in the UK, looking at changes in device ownership over the past three months – consumers’ purchasing intentions; changes in online activity – and analyses what industry developments are driving these changes.

## Dishwashing Products - Brazil

“Automatic dishwashing products are still unknown to the majority of Brazilians due to low penetration of dishwashers in the country. The industry’s efforts to supply more affordable dishwashers, as well as significant social changes taking place in Brazil, are factors that promote the development of the automatic dishwashing segment ...

## Consumer Attitudes toward Technology in Financial Services - US

“While ‘electronic banking’ used to mean banking by computer, it now encompasses three devices: computers, smartphones, and tablets. Because each device is different, both with regard to the people who use them and the functions for which they are used, banks that want customers to migrate to those devices need ...

## Contract Catering - UK

“Menu innovation represents a key opportunity for operators to bolster sales in the higher education sector where a fifth of students currently state that they avoid or limit their use of catering on campus as the current food choices are too boring.”

## Cycling in Scandinavia - Scandinavia

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.

## Digital Trends Autumn - US

“The digital divide is crumbling, with respondents from lower-income groups showing high levels of using the internet, and increased ownership of computing products. The next phase of growth for hardware and software will be for products and services that effectively target lower-income groups.”

## Domestic Tourism - UK

“The holiday industry is increasingly polarising between holiday haves and have-nots. Holiday brands with a clear ABC1 bias – eg Center Parcs (the ‘middle class Butlins’), Hoseasons premium lodge brands or hotels catering for the city break phenomenon – have been performing well. Many of the have-nots may not be ...

## Eating Out Trends - Brazil

“Regardless of different consumer profiles and types of establishments, the biggest challenge faced by the foodservice sector in Brazil seems to be achieving a balance between convenience (related to time) and quality (related to ingredients used), superiority of taste, and, in some cases, healthy aspects of food.”

## European Leisure Travel Industry - Europe

This report provides an overview of the current state of the European leisure travel industry with particular emphasis on important issues that are impacting the trade, the ten largest tour operators and the five leading outbound country travel markets.

## European Retail Handbook - Europe

This is the 17th edition of the European Retail Handbook. Like its predecessors, it is designed to provide the essential background information to understanding the retail scene in each European country. We cover 36 countries, the smallest of which is Luxembourg with just 500,000 people, the largest is Russia ...

## Food Trucks - US

“Food trucks must face many barriers in order to break through and find success. These include overcoming a lack of physical location, meeting governmental regulations, finding a way to achieve operational efficiencies, and meeting the needs of mobile consumers. While some food truck operators have found unique ways to solve ...

## Fragrances - US

“The fragrance category is highly competitive, with fine fragrances often being viewed as occasional use items. However, innovations that add functionality combined with creative retailing and packaging opportunities could lead to increased usage, helping to propel future category growth.”

## Estilo de Vida dos Acima de 55 anos - Brazil

“A população mundial está envelhecendo e os jovens adultos adiando cada vez mais os planos de constituir família. Essa mudança no perfil demográfico, com menos reposição, ocorre de maneira intensa no Brasil. Nos últimos cinquenta anos, o percentual de idosos quase dobrou e as estimativas, com a melhora na expectativa ...

## 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.

## Eyeglasses and Contact Lenses - US

“The market of eyeglasses and contacts is highly competitive, and a few players account for the majority share. Additionally, changes in the way these products are bought and sold will impact the market. Opportunities for innovation exist to help players stand out from the competition and increase brand loyalty.”

## Footwear Retailing - China

“The increasingly competitive footwear retail market in China means retailers need to adapt quickly to diversifying consumer footwear needs. As retailers expand their coverage across more of China and into more lower tier cities, where average store turnover tends to be lower, they must focus on raising frequency of shopping ...

## Gluten-free Foods - US

“The gluten-free food category will continue to grow as an increasing number of manufacturers develop better-tasting and more nutritious gluten-free foods. Category appeal beyond those with celiac disease, coupled with a new FDA ruling for gluten-free product labeling, suggests the category will grow out of its marker as just another ...

## Hand Tools (Industrial Report) - UK

"A severe recession has restricted development in the hand tools market, however pockets of growth have been evident. Going forward, opportunities remain for those who can tailor tool products effectively to growing end-use sectors."

## Hotels - China

"China's hotel market has grown rapidly in recent years, and future growth prospects also look good, but there is also rising competition in the market. While the number of Chinese people travelling for work and leisure has increased, driving the dramatic increase in new hotel openings, hotel chains now face ...

## ISAs - UK

"There is huge potential to increase the take-up of ISAs, given that many more people hold cash and investments than hold one of these tax wrappers. A low central base rate should encourage more savers to look favourably upon cash ISAs, which tend to offer better returns than their non-tax-exempt ...

## Leisure Time - China

"Due to the slowing consumer economy in China, competition is increasing in many leisure services sectors, and this is forcing leisure service providers to look beyond their immediate consumer bases and develop more business among middle and lower income groups, and in lower tier cities."

## Lifestyles of the Over-55s - Brazil

"The world's population is aging and young adults are increasingly postponing plans to start a family. This demographic profile change, with lower levels of population replacement, is strong in Brazil. Brazilian women are postponing having children until later in life, and it's estimated that by 2030 women will become mothers ...

## Marketing to Non-Traditional Parents - US

## Hispanics and Personal Care - US

"In order to grow the Hispanic market, personal care manufacturers need to find new ways to entice Hispanics to try new products and get excited about the shopping experience. Personal care products don't need to be thought of as a commodity; less acculturated Hispanics still have a long way to ...

## Irish Lifestyles - Ireland

In 2013, Ireland is slowly moving away from the economic downturn and consumer confidence is increasing. This report examines the health of both NI and RoI consumers, looking at physical health, financial health and indeed mental health and the factors that have led to the current state of each. With ...

## Kitchens and Kitchen Furniture - UK

"People expect a lot from their kitchens. They want the kitchen to be an organised space that can accommodate a lot of possessions, and be a place to eat and entertain. A kitchen must combine practicality, style and a sense of status. But modern homes are getting smaller and a ...

## Lifestyles of Mums - UK

"Brands that are responsive to mums' concerns and aim to grow with their preferences (which are increasingly expressed via social media channels) will be in a stronger position when competing for their consumer loyalty."

## Marketing to Moms - US

"In addition to advertising overexposure, moms are confronted with issues such as safety, childhood bullying, health and nutrition, and the influence of social media. Understanding moms' top concerns as they relate to her children—and her aspirations for them—can help brands tailor messaging that will resonate with moms and assist with ...

## Meat-free and Free-from Foods - UK

“Non-traditional parents face the same challenges as traditional parents in providing for their kids and doing so in the most cost-effective ways possible. Marketers can acknowledge non-traditional families and the fact that their family settings have become more common by including them in advertising.”

## Men's and Women's Shaving and Hair Removal - UK

“Despite the increasing availability of permanent hair removal devices for use in the home, the high initial cost is still off-putting for most consumers. The convenience, flexibility and price of razors is already of high appeal to both men and women alike, although advances in lubricating strips and moisture bars ...

## Mobile Apps - US

“The high app engagement level of Millennials makes them a lucrative target and companies targeting the demographic should consider their particular interests. This generation is more willing to pay for apps, and while ad revenue is still a major part of generating income for developers they must ensure their ads ...

## Personal Loans - Ireland

“The value of the personal loans market continues to decline as consumers shy away from debt products, preferring to save for the things they need and want. While economic and employment conditions are set to improve in Ireland, it will likely be many years before pre-recessionary levels of demand for ...

## Plumbing Products (Industrial Report) - UK

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## Queijos - Brazil

“A key weakness for the meat-free market is that over half of adults note that meat substitutes lack flavour. A potential solution lies in adapting the recipes of these lines as a large minority of adults note a keenness to try meat substitute pieces containing herbs/spices with agreement rising ...

## Men's Toiletries - China

“Evolving lifestyles, changing social outlooks and cultural inspirations from the developed markets mean Chinese men are increasingly focused on their looks with a higher spending power. Brand premiumisation is one way to capitalise on the male vanity trend in China.”

## Online and Mobile Banking - Ireland

“Usage of mobile banking will continue to grow in Ireland as consumers become accustomed to performing banking activities at a time and place that suits them; while banks continue to move towards a more mobile and self-service business model. Going forward mobile banking providers could consider utilising the ‘FaceTime’ features ...

## Pet Insurance - UK

“What pet owners deem important when choosing a pet insurance policy can have a direct effect on which channel they are likely to use when buying it. Understanding this can give product providers a major edge over their competition when it comes to product design, promotional activity and of course ...

## Produtos para Lavar Louças - Brazil

“O mercado de produtos para lavar louça no Brasil apresenta segmentos em polos opostos de desenvolvimento. De um lado os detergentes líquidos manuais formam um segmento amadurecido, com uma forte presença nos lares brasileiros, alta frequência de uso, cujo crescimento das vendas no futuro dependerá cada vez mais da demanda ...

## Recycling (Industrial Report) - UK

“A categoria de queijos no Brasil apresenta uma considerável penetração, concentrada nas opções de queijos mais tradicionais, como Mussarela, consumida por 88% dos consumidores, contra apenas 25% que consomem queijos especiais como Camembert ou Brie. Além do preço, essa diferença no consumo se dá pelo desconhecimento local sobre os queijos ...

## Red Meat - US

“The red meat category is facing decreased interest from consumers in light of growing concerns over health and price. Yet the market still has opportunities to infuse some excitement into the category with premium positioning, new cuts of meat, value-added products, and new packaging.”

## Russia Outbound - Russia

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## Soup - Ireland

“The RoI soup market experienced a decline in sales since 2008, with 2012 marking the first year of recovery. The NI market proved to be less volatile with year-on-year sales mainly increasing. Both markets are forecast growth until 2018; however, innovations in health, flavour and convenience are needed to drive ...

## Sports Participation - UK

“The biggest issue facing the sport participation market post-London 2012 is the question of ‘what next?’ The Olympic Games – and Team GB – have created much sustained positive sentiment around sport, but that will not last forever and needs to be tapped fairly quickly to get new participants ...

## Sugar and Sweeteners - US

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.

## Roofing Materials (Industrial Report) - UK

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## Short/City Breaks - UK

“The advent of social reviews demands that brands react by launching innovative ventures such as those that seek to court influential social media users. Attracting influential social reviewers and offering tangible incentives for promoting or endorsing brands on social networks is set to become increasingly necessary as the social review ...

## Spirits - China

“High earners’ tendency to drink spirits during wider occasions, reflects the necessity for the high-end spirits brands to explore other occasions instead of concentrating on the gifting market. High-end baijiu brands could benefit from exploring a positioning as an indulgence by highlighting the pleasure of enjoying the products. Meanwhile, further ...

## Still, Sparkling and Fortified Wine - UK

“Rather than trying to compete with standard strength wines, the lower-alcohol category may be better placed to promote its accessibility to younger consumers and target drinking occasions which have driven growth in categories such as cider.”

## Tendências em Comer Fora - Brazil

“Fears about the safety of some sweeteners continue to plague the sugar substitute segment, suggesting that synthetic sweetener brands still have more to do to settle concerns about potential negative side effects. Ads that transparently chronicle the origins of these products, their ingredients, and how they are produced may help ...

## **Thermal Insulation (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.

## **Vacuum Cleaners - US**

“Offering an improved vacuum cleaning experience – more maneuverable, lighter, quieter – may be as sure a path to increased market share as improved suction power. There are also opportunities to eliminate the experience altogether with robotics and to make vacuuming an essential step in protecting health.”

## **Video Games and Consoles - UK**

“The Wii’s sales popularity has declined to a record low, with the poorly performing Wii U failing to provide a balancing revenue boost for Nintendo. Sony and Microsoft will be hoping that their next-generation consoles do better on release in December 2013, and strong pre-order numbers do seem to paint ...

## **Watches and Jewellery Retailing - UK**

“While consumers are increasingly happy to browse and buy precious metal jewellery online, not being able to see the piece in person remains a big barrier to shopping online. Two fifths of women like to see the item before buying it and a quarter like to try it on meaning ...

## **Yellow Fats and Edible Oils - UK**

“A atividade de comer fora não é vista somente como um momento de lazer, mas é também uma forma de economizar tempo, pois não é necessário cozinhar, e muitas refeições podem ser feitas “on the go”. Cada vez mais, os brasileiros estão buscando soluções práticas, que otimizem o tempo que ...

## **UK Retail Briefing - UK**

Each month Mintel’s UK Retail Briefing concentrates on a particular sector or market. This month’s focus is on DIY, furniture and floor-coverings retailers.

## **Vehicle Recovery - UK**

“Despite the fortunes of the vehicle recovery services market set to improve as both the UK economy and car sales strengthen during 2013, there remain a number of issues to be tackled by those operating in the market. These include the issue of the rising cost of owning a vehicle ...

## **Vitamins and Supplements - UK**

“Although the market has seen growth in value in 2012 driven by special offers and promotions, people are not experimenting and special offers may be hindering overall growth in the category. Different approaches in special offers, for example bundling discounted vitamins with products in other categories, could encourage experimentation. Legislative ...

## **Women's Body, Hand and Footcare - China**

“The Chinese body, hand and footcare market is the largest in the world due to population size, although it displays significant untapped potential for growth. With income levels rising across the country, the subsequent emergence of the Chinese middle class is likely to be a driving factor for increasing product ...

## **休闲生活 - China**



“Innovation around yellow fats with added benefits has the potential to add value to the market, with more than a third of consumers agreeing that it is worth paying more for butter/spread with health claims. Butter/spread which is good for bones would appeal to households with children, suggesting ...

## 女性身体、手部和足部护肤品 - China

由于中国人口规模巨大，中国的身体、手部和足部护理品市场已经成为全球最大，而该市场仍然具有重大增长潜力。全国人民收入水平日益增长导致中国中产阶级的兴起，而这很可能将成为提升产品知名度和使用率的推动因素，同时，由于中国面积巨大，不同区域消费者的皮肤护理需求不同，而这为市场中企业带来机遇，可以在产品创新的过程中，考虑不同区域消费者的皮肤护理需求。相比产品价格，中国女性更关注产品效果，因此品牌走高端路线，促进消费者对产品品质 and 功能的兴趣，则将极具潜力。

## 彩妆 - China

中国消费者越来越富裕。随着中国消费者收入的增加以及基本生活质量的显著提高，中国女性预计会在彩妆等非必需品上花费更多的金钱。这表明，各品牌有绝好的机会，可以将数百万低线城市潜在消费群体转变为实际消费者。与此同时，中国的中产阶级促进了对非必需品类消费的需求。中国的中产阶级飙升不断提升的购买力是市场增长最大的长期发展潜力。

## 男士个人护理用品 - China

本报告主要探讨中国市场上专为男性设计的个人护理用品，但是鉴于此市场仍为新兴市场，调查涵盖男女通用型洗发水（如海飞丝）或沐浴产品，以及唇部和手部个人护理用品。

## 鞋类零售 - China

中国鞋类零售市场竞争越来越激烈，意味着零售商必须作出快速反应以迎合消费者日益多元化的鞋类需求。随着国内零售商的覆盖范围越来越广，渗透到更多单店平均营业额较低的二、三线城市，它们在未来必须着重提高消费者的购物频率，以避免销售额和市场份额增长的停滞不前。

由于中国消费经济增速放缓，一些休闲服务业之间的竞争越来越激烈，迫使休闲服务供应商扩大其即时消费群，并在中低收入群体和低线城市中发展更多业务。

## 宾馆酒店 - China

近年来中国酒店市场迅速增长，其未来发展前景也不错，但市场竞争也日渐白热化。随着中国商务和休闲旅行人数的增加以及因此导致的新开业酒店数量的大幅上涨，连锁酒店正面临迎合日益多元化的旅行需求和住客差异等问题。

## 烈酒 - China

由于2012/13财年高端白酒需求疲软，烈酒市场面临着很大的压力，使得部分高端产品的售价在2012年高位的基础上出现50%以上的下调，导致许多领军品牌的利润受到挤压。领军白酒品牌纷纷将目光转向大众市场，拓展中端系列产品。而洋酒品牌依托正面的品牌形象，获近半数烈酒饮用者对其高品质和时尚的形象持积极评价。

## 航空旅行 - China

2008年至2013年间，中国航空旅客的数量以13.3%的年均复合增长率持续增长，而全球的年均复合增长率仅为4.5%。这意味着对于航空旅行而言，中国仍然会是一个快速发展的市场。鉴于其每年人均航空旅行率较低（0.27，美国为2.6），市场发展潜力巨大。