

## April 2016

### Added Value in Dairy Drinks, Milk and Cream - UK

“Given shoppers’ willingness to boycott a milk where farmers are seen to not have received a fair price together with their uncertainty over which operators pay farmers fairly, there is a need for companies to make their credentials in this area tangible to consumers.”

### American Lifestyles: Balance or Bust - US

“Even though an improved economy has left Americans with a little extra money in their pockets, some are still struggling to find a balanced approach to spending. In an attempt to spend prudently while still enjoying whatever extra they have, consumers are meeting their financial obligations by saving and paying ...

### Automotive Retailing - Ireland

“Safety is an important consideration for Irish consumers when buying a car. Introducing innovative safety features such as night vision and pedestrian detection can help car manufacturers to boost the appeal of their brands to consumers and reduce the number of accidents, injuries and deaths, thus improving the overall road ...

### Baby Food and Drink - UK

“Homemade food continues to dominate usage, offering parents a cheaper way to feed their child as well as control over ingredients. This poses a threat to the baby food and drink market. Brands and own-labels can play a role in helping self-sufficiency, through sharing their expertise for example in online ...

### Bread - Ireland

“The bread market has enjoyed growth between 2014 and 2015, but deep discounting in the packaged bread sector of the market will inhibit future growth. However, with growing consumer confidence seeing more consumers splashing out on morning goods and

### Airlines in Russia - Russia

“Aeroflot is clearly benefiting from the retrenchment and/or bankruptcy of competing airlines – both domestic and foreign. From early September 2014 to early 2016, Russian airlines grounded or returned to lessors a total of 254 aircraft, which is 34% of the total fleet operated in 2014. By segments, the ...

### Attitudes towards Home-Delivery and Takeaway Food - UK

“As mobile ordering becomes the norm for more people, greater opportunities are created in terms of data collection and customisation. Restaurants and third-party services can create tailored deals and advertisements that can be sent directly to users’ smartphones at opportune moments.”

– Rebecca McGrath, Leisure Analyst

### Baby Durables - US

Total retail sales of baby durables totaled \$9.3 billion at current prices in 2015, up 2.5% versus 2014. This growth is forecasted to continue at an average rate of just under 1% annually through 2020 when sales should reach \$9.8 billion. Elevated consumer confidence levels as well ...

### Betting Shops - UK

“A slower-growth future for gaming machines is giving bookmakers a new imperative to revitalise the declining sports betting side of their business. Bringing online products into betting shop settings is a good starting point but greater use of mobile looks the key to longer-term success.”

– David Walmsley, Senior ...

### British Lifestyles: Growing Tired of Austerity - UK

“Britain’s economy growth has outstripped other major economies, employment is high (and unemployment is low) and wages have been rising above inflation. Yet, consumer sentiment has been slow to respond. Perhaps

specialist breads, this will help to sustain value growth.”

— ...

## Buy-to-let Mortgages - UK

“The buy-to-let market will face an onslaught of challenges over the coming years, with an influx of regulatory changes that are set to slow down growth. Lenders need to adapt product ranges, support landlords with investment strategy rethinks, and ensure that all new borrowers are equipped with the knowledge to ...

## Canadian Lifestyles: It's Not Dollars to Donuts - Canada

“Although the majority of Canadians perceive their current financial situation as stable, there is a sense that the rising cost of goods is impacting consumers – leading to a greater prioritization of addressing current debt and saving for the future. The outlook on the economy is cautious leading to consumers ...

## Children's Drinks - China

“Many current CD products have overemphasized the kids-friendly taste and package design and have overlooked that parents are the ultimate decision makers, with all-natural ingredients the element that matters most for them. Excessive food additives and high sugar content are currently parents’ biggest concern and should be removed to keep ...

## Connected Living - Smart Home and Integrated Devices - Canada

“The majority of Canadian consumers are interested in making their home more ‘connected’ by using smart devices. The growing desire by the consumer for convenience, safety, security and energy and money savings will support the progression of the smart home market.”

**Andrew Zmijak, Research Analyst, Consumer Behaviour & Social Media**

## Convenience Stores - UK

we will need to see a more sustained period of growth in earnings before Britons start feeling truly optimistic.

## Camping and Caravanning - UK

“Camping and caravanning is gradually repositioning itself. Rather than just being the default option for those looking for an affordable way of holidaying, it is starting to be seen as an activity which offers people a high standard and wide choice of accommodation, while at the same time allowing them ...

## Car Purchasing Process - US

Over 55 million new and used vehicles were sold in 2015 and many consumers are still eager to buy in the coming year. Yet the landscape is shifting, and the consumer attitudes that led to strong sales over the past five years are unlikely to be repeated. Two main market ...

## Chocolate Confectionery - UK

“Flat volume sales in chocolate confectionery show the continuing need for brands to use innovation to encourage trading up, both when buying chocolate as a treat for oneself and when gift purchasing. With the majority of people thinking it is OK to eat small amounts of chocolate every day as ...

## Construction - UK

“Construction activity continues to perform above wider UK GDP. However, growth rates are now slowing like the wider economy after a burst of activity that ‘kick started’ the recovery period. The market has also been constrained by uncertainties caused by the general election last year, the EU referendum this year ...

## Cordials and Squashes - UK

“Consumers are increasingly looking for convenience in all aspects of their grocery buying habits. That is why we have seen a shift to more fluid grocery shopping habits with consumers, particularly younger consumers, shopping on a more when-needed basis. This shift has fuelled the convenience market and the leading players ...

## Cough, Cold, Flu and Allergy Remedies - US

"US sales of cough, cold, flu, and allergy remedies grew substantially in 2015 largely due to the Rx-to-OTC switch of Flonase, a nasal allergy medication. A moderately severe flu season, coupled with a relatively ineffective flu vaccine, contributed to growth in the market. Households with children are a strong opportunity ...

## Department Stores - Europe

“There was a time when department stores were seen as the dinosaurs of the retail industry. But that is no longer the case. House of Fraser is a destination store for young fashion. John Lewis, Galeries Lafayette and Printemps all attract a younger and more affluent customer than average. That ...

## Department Stores - Germany

“German department stores need to move from being laggards to leaders in service innovation and new product development if they are to stand a chance of surviving much beyond the current decade. New ownership and investment could provide a vital shot in the arm that allows them to achieve this ...

## Department Stores - Spain

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.

## Destilados - Brazil

“Os brasileiros estão consumindo menos bebidas alcoólicas, inclusive destiladas. As marcas precisam ser

“Health and naturalness will remain important sales drivers in the market in the coming years. Innovating with plant-derived sweeteners and using the ‘no added sugar’ claim should be an effective way for brands to promote their health credentials.”

– Chris Wisson, Senior Drinks Analyst

## Cuidados com o Cabelo - Brazil

“Tanto o mercado de xampus e condicionadores, quanto o de modeladores, vai continuar tendo dificuldades de crescimento devido à crise econômica atual. Desenvolver produtos com novos ingredientes, como o óleo de coco, e aproveitar certas oportunidades (como o Bepantol aproveitou com a chegada do ‘xampu bomba’, por exemplo), são ideias ...

## Department Stores - France

“The department store sector put in a resilient performance in 2014, at a time when the domestic economy was weak. However, much of this was down to the groups’ flagship stores in Paris attracting wealthy international tourists, which masked lacklustre trading at stores outside of Paris. The French economy grew ...

## Department Stores - Italy

“The recovery in the Italian economy has been weak, but in 2015 consumer spending was the driving force of what little growth there was. This has helped the two leading department store chains to both deliver positive growth, but La Rinascente is the clear winner with its premium offering and ...

## Department Stores - UK

“Department stores have reinvented themselves. They have become destination stores for younger customers offering aspirational brands, complemented by great own brands. The best department stores recognise that a store is much more than somewhere to just buy products, it should be a leisure destination with a retail offering that is ...

## Digital Trends Spring - US

"Consumers feel ambivalent toward technology. They are both highly connected and concerned about the

criativas para fazer os consumidores beberem (ou beberem mais). Além da crise econômica que afeta o bolso, os brasileiros estão preocupados com a saúde. Uma maneira de lidar com isso é fornecer informações nutricionais e conselhos sobre ...

## Discounters - Ireland

"Discounters are currently one of the fastest-growing markets in Ireland, with discount retailers forecast to see 7% growth in 2016. However, there are still hurdles to overcome for discounters to effectively compete with their multiple supermarket rivals."

## European Retail Briefing - Europe

This month ERB includes:

## Fleet Services - UK

"The popularity of fleet cars is at an all-time high, with increasing business confidence, rising employment rates, and low fuel costs boosting demand by large firms. However, with fleet car registrations contributing to 92% of the fleet services market and business cars making up just 8%, the fleet services industry ...

## Frozen Snacks - US

"After a slight decline in 2014, sales of frozen snacks rebounded in 2015 and are forecast to continue that growth through 2020. Emerging restaurant brands, as well as brands from other snack categories and, indeed, fresher foods, begin to leverage their attributes in frozen cases. At the same time, consumers ...

## Haircare - Brazil

"The market for shampoos and conditioners as well as hairstyling products will continue to face difficulties to grow because of the current economic recession in Brazil. Developing products with new ingredients (such as coconut oil) and taking advantage of certain opportunities ('bomb shampoo', for example) are essential to thrive in ...

social impact of this connectivity. As a result, companies are caught in a balancing act that, on one hand, challenges them to engage and entertain their targets. On the other, brands must avoid overwhelming consumers with ...

## Disposable Baby Products - US

"After years of flat or declining sales, the disposable baby products market is bouncing back as birth rates and consumer confidence recover and parents allocate more spend to premium products."

## Facial Masks - China

"The low unit price and immediate hydration have made facial masks an essential beauty routine for most Chinese women. Considering the high levels of usage, the next step in market development will be product premiumisation and product extension."

– Wenwen Chen, Senior Beauty Analyst

## Fridges and Freezers - UK

"Innovation has touched almost every aspect of design in the market for refrigeration, inspiring consumers to trade up for better style, functionality and different formats. Today fridges and freezers come in a range of colours, have a variety of storage solutions, are more energy-efficient, keep food fresher for longer and ...

## Grains and Rice - US

"The \$2.5-billion rice and grains category is experiencing modest growth thanks in part to a generally healthy image and consumer interest in exploring an increasingly wide range of cuisines incorporating rice or grain."

## Hispanics and Cleaning the House - US

"Hispanics' expenditures on household cleaning products have grown modestly as a result of Hispanics' attention toward value and a gradually diminishing sense of urgency for keeping their homes spotlessly clean as they become more acculturated and adopt a

more casual attitude toward household cleanliness. However, this is not to say ...

## Holiday Trends - China

“The future growth of the demand for travel comes from family travellers who are eager to experience immersive local culture in a leisurely way. In addition, long weekends and the sharing economy will further boost the holiday market in China.”

– Gordon Gao, Senior Analyst

## Innovations in the Insurance Market - US

After years of offering little innovation, the insurance industry is rapidly integrating technology into its interactions with consumers. Mobile apps that make it easier to get information and conduct transactions, trackers that provide feedback so people can change their behavior, and devices that keep homes safer and more environmentally friendly ...

## Marketing Financial Services to Women - Canada

“Positive messaging centred on life events is more likely to resonate with women and encourage them to be proactive about investing and retirement planning.”

## Menswear Retailing - China

“The menswear market is slowing, consumers are becoming more demanding and online retail is intensifying competition. Online retailing is helping brands to increase their market penetration, but they also need to make better use of stores as customer service centres. Brands also need to engage with consumers via social media ...

## Millennial Travelers - US

“Based on their travel behaviors and attitudes, Millennials are emerging as one of the most valuable population segments for the growing US travel industry.

## Infant Milk Formula - China

“Faced with upcoming tougher regulations and increasingly intense market competition, companies and brands need to find new approaches to communicate with consumers as well as drive sales. IMF (Infant Milk Formula) products which are easier to absorb and similar to breast milk are more likely to win in the China ...

## Loyalty and Brands - UK

“The differences in building and measuring loyalty across different sectors mean that brands must take a nuanced approach to fostering a connection with customers. Bigger brands with more exposure tend to have an immediate advantage in building favouritism; however, recent arrivals such as Netflix show that new brands, particularly those ...

## Marketing to the iGeneration - US

“Until recently, the iGeneration has been largely overshadowed by the preceding generation: Millennials. As iGens begin to edge Millennials out of the key 18-34 demographic, marketers need to pay closer attention to this generation’s priorities and how their behavior differs from the dominant Millennials.”

- Fiona O'Donnell, Category Manager - Multicultural ...

## Milk and Flavoured Milk - China

“Given the large base of lactose intolerants in China, the lactose-free milk segment is worth investing in. The market will, however, require laborious education programmes due to poor consumer understanding of lactose intolerance. Plant protein drinks are also threatening the milk category, suggesting that milk producers should reinforce their health ...

## Mobile Phones - UK

“As the market approaches saturation, there is no one-size-fits-all-solution, as upgrades by individual consumers are triggered by different innovations. As a

Mintel's consumer research data indicates that not only are they leading in leisure travel and business travel spending, but they are also blurring the lines between ...

## Music and Video Streaming - UK

"Original content has become a powerful selling point for video streaming services. Music streaming services, which are looking to distinguish themselves within an increasingly competitive marketplace, are beginning to similarly explore the option of adding exclusive video content."

## Nutritional and Performance Drinks - US

"Mintel estimates the nutritional and performance drink category continued its moderate growth, with dollar sales increasing 6% in 2015. The category benefits from growing consumer attention toward healthy living, and provides a convenient and efficient means of helping them meet goals."

## OTC Analgesics and Cold and Flu Remedies - UK

"Overall, OTC analgesics and cold and flu remedies have enjoyed strong sales growth in recent years, bolstered by high levels of NPD and sustained investment in advertising, as well as a less effective flu jab in winter 2014/15. However, media headlines over the marketing of some branded analgesics could ...

## Potable Water and Sewerage - UK

"The WFD will continue to be a key driver for capital investment in the water and sewerage industry. It is also expected to drive innovation as companies are looking at new technologies that offer the best solution to implementing the directive. However increased waste water treatment under the WFD will ...

## Saving and Investing for Children - UK

result, consumers' varied preferences could potentially be best served with customisable modular solutions that allow for personalisation of both technical capabilities and appearance."

– Sara Ballaben, Technology Analyst

## Non-dairy Milk - US

"Total non-dairy milk sales are expected to continue upward as consumers search for better-for-you alternatives to dairy milk, and as plant-based alternatives continue to trend to meet a variety of consumers' dietary needs. Flavor, function, and nutritional innovation will help keep consumers interested and attract new audiences, while the wide ...

## Occupational Health - UK

"There are approximately 450,000 new cases of occupational ill health in the UK every year, but the costs of managing ill-health at an individual corporate level remain poorly measured and unclear. Active marketing of OH, coupled with evidence-based proposals for cost-effective interventions, will be required if the market is ...

## Personal Pensions - UK

"The pension freedoms brought renewed interest to the personal pensions market in 2015. However, the pace of legislative and regulatory change is undermining confidence in pension savings, with consumers looking towards alternative investments to fund retirement. As such, pension providers should continue to focus on improving access to education and ...

## Salty Snacks - US

"The salty snacks market continues to perform well, especially as the popularity of snacking continues. The meat snacks and popcorn segments continue to drive much of this growth, fueled by strong product innovation, and positive health perceptions. Health and indulgence remain a key theme as product flavor is a key ...

## Seasonal Shopping (Autumn/Winter) - UK

“Although 61% of parents in the UK are putting money away for their children’s futures, a third of these are not doing so on a regular basis. Moreover, there are a significant minority who are not managing to save anything at all. For many parents, having other more pressing demands ...

## Shampoo, Conditioner and Hairstyling Products - US

The shampoo, conditioner, and hairstyling market decelerated from the previous year, growing by 2.1%. The hairstyling segment has remained stagnant due to consumers’ interest in more natural hairstyles. Innovation through new product forms that are addressing consumers’ concerns and hair needs, the expansion of male offerings, and better delivery ...

## Spirits - Brazil

“Brazilian consumers are drinking fewer alcoholic beverages, including spirits. Brands need to get creative to convince consumers to get on board and start drinking (or drinking more). Apart from the economic crisis, which affects their pockets, consumers are worried about health issues. Providing more information about drinking responsibly as well ...

## The Car Purchasing Process - UK

“Car sales reached a new high of 9.93 million units in 2015 helped by a strong economy, low interest rates and the actions of manufacturers and retailers to encourage purchases. Looking ahead, although the market is showing signs of stability there remains considerable interest in purchasing a car. Around ...

## The Leisure Outlook - UK

“The ever-growing importance of food to pub revenues means that landlords are competing as much against mid-market restaurant chains as they are against other pubs. There’s a growing case for replicating the kind of child-oriented provisions, such as toys and colouring books, that the likes of Pizza Express and Wagamamas ...

## Toilet Cleaning, Bleaches and Disinfectants - UK

“The value of autumn events rose by an estimated 5.8% in 2015, driven by increased spend on Halloween among young families and Millennials, and continued high purchasing levels for back-to-school. Overshadowed by these events and the Christmas build-up, the retail boost from Bonfire Night is relatively small. The supermarkets ...

## Smart Homes - US

“Only in the past few years has the smart home market emerged onto solid footing following a variety of early product failures, such as \$20,000 smart refrigerators that were soundly rejected by consumers. The shift to a more attractive product mix came when manufacturers not only brought down prices ...

## Tea Drinks - China

“The ready-to-drink tea drinks market in China has developed slowly over recent years. Intense competition from other soft drink categories and the decline in demand for green and black/red tea drinks, and lack of product innovation have all led to the poor performance of the current market. Despite the ...

## The Chinese Consumer - China

“China is gradually progressing into an energy-saving, environmental-friendly and technology-driven economy in which mass industrial production is giving way to domestic consumption to act as the key growth engine. Ever-increasing disposable income and an optimistic economic outlook encourages Chinese consumers to spend more money in almost every sector of life ...

## The State of the Burger - US

“The burger category is ripe for continued innovation as new fast casual players enter the market and existing brands expand their burger menus. Diners today are open to trying new and exciting burgers made with innovative beef blends and unique toppings. While burgers are a favorite dish for many consumers ...

## UK Retail Briefing - UK



“The continued shift towards multipurpose cleaning products and low-cost bleach is affecting value sales in the toilet cleaning, bleaches and disinfectants category as consumers look to save money and space in the home. To combat this, branded bleaches and specialist toilet care brands must rethink how they can increase the ...

## UK Retail Rankings - UK

The food superstores are losing market share to the discounters and convenience stores as there is a movement of population back into the inner cities. New strategies are developing and Sainsbury's has made an agreed bid for Argos. Tesco has yet to show its hand, but it is staging ...

## Women's Haircare - UK

“The women's haircare category has struggled to grow in value in recent years, as savvy shopping behaviours see women buying branded products at discount retailers. In addition, women are washing and styling their hair less frequently, which may be driven by concern over damage. Interest in shampoos with different levels ...

## 儿童饮品 - China

“目前很多儿童饮料过分强调儿童偏好的口味和包装设计，并忽略了家长才是最终购买决策者的事实，而全天然成分对于家长来说是最重要的购买因素。过多的食物添加剂和高含糖量是目前家长们最担忧的问题，儿童饮料中应减少使用这些成分，以保持该品类的市场可持续性，并与来自非儿童饮料市场上的竞争相抗衡。”

## 旅游度假趋势 - China

“中国旅游市场的未来增长主要来自于渴望通过休闲方式并能亲身体验当地文化的家庭游客的需求。另外，长周末和共享经济将进一步推动中国旅游市场的增长。”

— 高尔特，高级研究分析师

## 男装零售 - China

Each month Mintel's UK Retail Briefing concentrates on a particular sector or market. This month, we look at automotive fuel retailing.

## Voluntourism Worldwide - International

“Voluntourism' is a relatively new term in the tourism lexicon and has differing definitions. It is a label that is most commonly applied to a holiday that fuses tourism and voluntary work. While voluntourism is generally considered in the context of volunteering overseas, opportunities for this type of travel also ...

## 中国消费者 - China

“中国社会正向节能、环保、科技型经济转型，届时，以大规模工业生产为主的经济将被以国内生产为主导的经济所取代，成为经济增长的核心动力。日益增长的可支配收入以及前景乐观的经济展望都将刺激中国消费者增加在生活各个方面的支出（从日用品到非必需品以及非必要消费），以追求更优质的生活，享受期待已久的生活方式。”

## 婴幼儿配方奶 - China

“面对即将颁布的更严格的行业规范和日益加剧的市场竞争，找到与消费者沟通和进行产品销售的新方法是公司和品牌的当务之急。易于消化吸收和类似母乳的婴幼儿配方奶产品更有可能在中国市场上取胜。另外，鉴于中国妈妈们掌握的婴幼儿配方奶成分的知识有限，公司和品牌需要在市场教育方面加大投资。”

— 李宇静，高级研究分析师

## 牛奶和调味奶 - China

“鉴于中国有大量的乳糖不耐症患者，无乳糖牛奶大有可为。不过，由于消费者对乳糖不耐症认知不足，所以长远系统的消费者教育势在必行。植物蛋白饮料也威胁着牛奶市场的发展，意味着牛奶生产商应强化其健康益处，积极备战日益加剧的竞争。低脂牛奶仍将是市场小众产品，不过制造商可以借鉴参考全球的‘优质脂肪’奶趋势进行创新”。

— 刘超伦，高级研究分析师

## 茶饮料 - China



“男装市场增长放缓；消费者着装要求越来越苛刻，在线零售同时给竞争‘火上浇油’。品牌可以借助在线零售扩大市场渗透率，但同时也需要将实体店打造成为更好的客户服务中心。品牌还需要通过社交媒体与消费者互动，从而更好地回应日益多元化的消费品味和需求。因此，品牌应该为消费者提供更多个性化的服装选择，以及更多他们乐意支付溢价的精美优质时尚服饰。”

— 郭马修，亚太研究主任

## 面膜 - China

“较低的价格和立竿见影的补水效果让面膜成为大多数中国女性日常美容护肤过程中必不可少的产品。鉴于较高的使用普及率，市场发展的下一步将是产品高端化和产品延伸。”

— 陈文文，高级研究分析师

“近几年，中国即饮茶饮料市场增速放缓。目前，市场表现不济的原因在于：与其他软饮料品类之间的竞争白热化；消费者对绿茶以及红茶饮料的需求下滑；市场中缺乏产品创新。由于商家不断推进高端化，鼓励消费者趋优购买，同时，积极展开口味和成分创新，并推行行之有效的消费群体细分战略，精准定位。鉴于此，尽管市场面临多方压力，但未来的发展前景依旧乐观。”

— 李蕾，研究分析师