

**April 2014**

## **American Lifestyles 2014: Looking Forward - US**

“In 2014, it appears that America has finally stopped holding its collective breath, waiting for another economic shoe to drop. After five years of slow but steady growth, Americans have passed the tipping point of prolonged economic worry and have cautiously accepted that things are better. Confidence in personal finances ...

## **Automotive Retailing - Ireland**

“Along with the rising cost of learning to drive, the high motor insurance premiums for consumers aged 16-24 likely explains why they are the least likely to personally own a car. As such, new car dealerships could consider offering one year’s free insurance for consumers in this age group after ...

## **Bathroom Equipment (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.

## **Bread - Ireland**

“The all-Ireland bread market has experienced steady growth between 2009 and 2014, boosted by almost universal usage by Irish consumers. Looking ahead in order to drive growth within the market, brands should look to speciality breads as consumer spending improves in addition to flavour and format innovations to add value ...

## **British Lifestyles 2014: The British Dream - UK**

“Post-recession consumers will shift some of their focus away from their finances to taking care of their physical

## **Attitudes towards Family Dining - UK**

“More in-store entertainment and ordering/payment services are likely to take on a technological guise in the coming years as restaurants catch up to the fact that consumers, particularly children, are increasingly tech-savvy.”

## **Baby Food and Drink - UK**

“Innovation that taps into parents’ preference for homemade baby food has been limited, presenting ripe opportunities for baby food manufacturers. Extending their ranges with cooking ingredients that are specifically designed to be used in recipes for babies and toddlers, such as low-salt stock, extra-mild spices and low-acidity oils offers a ...

## **Brazilian Lifestyles 2014: Changing Consumption Habits - Brazil**

“While many developed countries are still recovering from the 2008 global financial crisis, the Brazilian economy has been growing since 2010, driven by domestic demand, more specifically by middle-class families. If 2011 was a year of balanced development, with government measures to leverage this consumption, in 2012, at the height ...

## **Breakfast Eating Habits - UK**

“Operators could look to marketing to reposition breakfast as a way to connect people or to offer a bit of me-time before tackling the day, reminding consumers that, for example, a bowl of porridge or a crumpet with butter is worth savouring.”

## **Bronzeador e Protetor Solar - Brazil**

“O mercado de produtos de proteção solar alcançou R\$ 1,9 bilhão em 2013, o que representa um crescimento de

health and nurturing personal relationships. As recession fatigue sets in, sectors that saw mixed fortunes during the downturn, especially leisure, entertainment and holidays, will see higher demand from consumers eager to give ...

## **Butter, Margarine and Cooking Oils - Brazil**

“Brazilian consumers consider the healthy properties of butter, margarine, and cooking oil as important. Margarine is seen as unhealthy, but this image could be changed by using olive oil, in order to project a healthier image. Olive oil is considered as an aspirational segment, not only because of its premium ...

## **Car Purchasing Process - UK**

“The new car market, while on the path to recovery, is not immune from challenges. Competition from those within and outside of the market is ever present and is likely to grow if recent trends towards consumer individuality continue. Getting closer to the buyer offers clear advantages for manufacturers and ...

## **Chocolate Confectionery - UK**

“Chocolate features widely in baking recipes, but few brands offer products geared towards baking. There is significant demand in this area, with a quarter of chocolate eaters interested in using their favourite chocolate in baking.”

## **Consumers and Financial Advice - UK**

“The advice gap presents an opportunity for the financial advice industry. Firms that are able to innovate and offer low cost solutions will prosper in future, while those who do not address this part of the market will forfeit share to online competitors.”

## **Convenience Stores - UK**

“For convenience retailers, those consumers incorporating c-stores within their regular grocery shopping repertoire are most important. On this basis,

11,5% em comparação a 2012, uma expansão impulsionada, principalmente, pelo segmento de protetores solares. O aumento da renda disponível e a estabilização da economia estimularam o crescimento não só ...

## **Car Finance - UK**

“The key to sustaining an impressive level of growth in the car finance market in the years to come will be offering extras to overcome consumer reactions to interest rate rises, and finding a way to get a real foothold in the used car market.”

## **Chinese Consumers - China**

“Operators need to re-adjust their products and services package to target the demand of the mass consumers rather than just the lucrative customers. Chinese aspiration to lead a healthy lifestyle is indeed another factor to direct their consumption to. Increasing average income indicates that Chinese are becoming more willing to ...

## **Chocolate Confectionery - US**

“Less than 10% of chocolate buyers say it's important for a product they buy to be ethically sourced. While a preference for Fair Trade products appears low, even among those who are familiar with the concept, ethical claims will be means of preserving an audience as the attention to company ...

## **Contract Cleaning (Industrial Report) - UK**

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## **Cough, Cold, Flu and Allergy Remedies - UK**

“In 2013, the cold/flu and allergy relief remedies market benefited from increases in product launch activity and

young shoppers – most importantly, the 25-34 age group – should be the focus for retailers.”

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

“Despite increasing sales, the cough, cold, flu, and allergy market is up against several challenges. Most consumers seek to prevent getting sick, lessening the need for remedies to treat their ailments. Additionally, it is difficult to predict the severity of a given cold or flu season. Providing ways to help ...

## **Department Store Retailing - UK**

“In order to stand out in a competitive market, it is essential for department stores to ensure that they improve their stores, with a quarter of consumers saying a modern looking store would encourage them to shop there more.”

## **Department Stores - France**

This year, our exclusive consumer research asked French consumers:

## **Department Stores - Italy**

This year, our exclusive consumer research asked Italian consumers:

## **Deposit and Savings Accounts - UK**

“The prolonged period of low rates of return on savings products has been detrimental to savers. Consumers are now showing a tendency to grow their in-credit current account balances, which often offer more attractive rates and benefits, instead of moving money to their savings accounts.”

## **Estilos de Vida dos Brasileiros 2014: Mudanças no Hábito de Consumo - Brazil**

marketing activity. Going forward, brands could look to more specifically target the key young adult demographic, who are the most likely to suffer from cold/flu and allergy-based ailments, as well as ...

## **Dairy Drinks, Milk and Cream - UK**

“Reflecting the established role of milk as a household staple, volume sales have posted modest growth. Milk is not a go-to drink as a drink on its own, however a tailored breakfast or exercise proposition can offer a growth avenue for brands, and a justification for a price premium in ...

## **Department Stores - Europe**

This report series covers seven Western European countries – six major economies, plus Ireland: the UK, France, Germany, Italy, Spain, the Netherlands and Ireland.

## **Department Stores - Germany**

This year, our exclusive consumer research asked German consumers:

## **Department Stores - Spain**

This year, our exclusive consumer research asked Spanish consumers:

## **Disposable Baby Products - US**

“Disposable baby product sales are expected to be stagnant to declining into 2018. To boost sales and stave off competition from private label, companies and brands should consider expanding the current category and better engage Hispanic parents.”

## **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.

“Enquanto boa parte dos países desenvolvidos ainda vem se recuperando dos efeitos da crise global de 2008, a economia brasileira tem crescido desde 2010, impulsionada pela sua demanda interna, mais especificamente, pelo consumo das famílias da classe média (aproximadamente metade da população). Se 2011 foi um ano de desenvolvimento equilibrado ...

## Food and Drink Retailing - Brazil

“The food and drink retailing sector in Brazil is highly competitive and dynamic. Brazilian towns everywhere are dotted with all types of outlets, ranging from hypermarkets to small bakers. Retailers must cater to demanding customers both in the local neighbourhood shops and in the more distant hypermarkets, and place emphasis ...

## Frozen Snacks - US

“Concerns about the nutritional value of frozen snacks will continue to be top of mind for consumers. Manufacturers will need to reformulate or expand their product offerings, ensuring these items meet consumer preferences for high-quality ingredients and convenient formats. More frequent snacking occasions will also impact product offerings, as well ...

## Gambling Review - UK

“Remote competition and the threat of increased regulation vary in strength from segment to segment but all can use new technology to first level the playing field with online and then enhance and differentiate the live venue experience itself.”

## Group Holidays - UK

“Escorted tour operators need to dispel negative perceptions of a lack of freedom and privacy associated with their products, especially among over-55s. But, given the right balance, many older independent travellers can be persuaded to trade an element of freedom in return for greater depth, expertise and richer experiences plus ...

## Innovation in Insurance - US

## Fridges and Freezers - UK

“There are pressures for manufacturers to create ever-more innovative products that serve the lifestyle needs of their customers. We expect to see more gadgets, more smart applications as well as carefully crafted product designs. Yet, at the same time, shoppers have the ability to seek out the keenest prices. So ...

## Full Service Restaurants - US

“Full service restaurants face many obstacles preventing traffic which will need to be rectified in order to boost sales. Such issues include menus that don't reflect the changing needs of consumers, outdated branding, a perception of poor value, and limited healthful options. In response, operators can expand dayparts and item ...

## Gas Supply and Distribution (Industrial Report) - UK

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## Haircare - UK

“While the haircare markets remain in growth, the pace has slowed in 2013 as consumers turn to savvy shopping methods to secure the cheapest prices, and scientific as well as technological advancements cause a cannibalisation of product needs.”

## Kids as Influencers - US

“Innovation isn’t just about products and their benefits to the consumer, it is about the total customer experience, whether they are buying insurance online or face to face. In order to achieve that, insurers need to look at things in a different way than they traditionally have, perhaps looking outside ...

## Loyalty in Financial Services - UK

“Financial services firms cannot expect their clients to exhibit loyalty when they feel that new customers are the ones getting the best deals. Indeed, most of the “loyalty” in the financial services market is due to customer inertia. Going forward, firms need to look at how they can reward long-standing ...

## Massa Alimentícia - Brazil

“As vendas de massas alimentícias no Brasil têm enfrentado um decrescimento no volume de vendas (-7% entre 2008-13), contra um aumento no valor de vendas na ordem 6% neste mesmo período, para totalizar R\$ 2,8 bilhões em 2013. O aumento no preço das massas têm contribuído para a transição ...

## Milk and Cream - Ireland

“Usage and sales of milk and cream remained strong in Ireland during 2013 and are expected to do so in 2014. Moving forward into 2015, with the removal of the EU milk quotas and increasing demand for Irish dairy products overseas, we could see milk prices become more volatile ...

## Milk, Creamers and Non-Dairy Milk - US

“Consumers are searching for innovative products, new flavors, and convenient packaging to fulfill their desire for healthier, on-the-go lifestyles. Opportunities for growth are present for the milk category to adapt to consumers’ nutritional demand by diversifying flavor profiles and occasion usage. However, the industry faces obstacles in its efforts to ...

## Pasta - Brazil

“Kids are influencing what parents buy, but families are getting harder to reach and more difficult to pigeonhole. We are seeing a shift in the demographics of the ‘traditional family’ as well as massive changes in how media is consumed. Marketers need to develop strategies with content that is not ...

## Manteiga, Margarina e Óleos Vegetais - Brazil

“Aspectos de saudabilidade são um atributo importante para o consumidor brasileiro nas categorias de margarinas, manteigas e óleos de cozinha. A margarina parece ser considerada pouco saudável, mas pode melhorar sua imagem por meio das credenciais do azeite de oliva, por exemplo. O azeite de oliva se tornou aspiracional não ...

## Mechanical and Electrical Contracting (Industrial Report) - UK

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## Milk and Flavoured Milk - China

“The milk market has been in the process of reshuffle with many large-scale merger and acquisition deals were agreed in 2013. The tightening regulations and stricter rules implemented by the government aiming at ensuring the quality of milk products tend to indirectly encourage the reshuffle of this market. In the ...

## Own Label Alcoholic Drinks - UK

“Retailers should proactively promote their quality and awards won to level the playing field against brands, particularly as the economy improves and brands are poised to benefit from an easing of the budgeting mentality.”

## Potable Water (Industrial Report) - UK

“Price increase in the category together with an increasing demand for healthier products has had a negative impact on the sales of pasta. The subcategories with the greatest potential for growth are whole-grain and fresh pasta, given consumers’ interest for these types of products.”

## Residential Flooring - US

“Increasingly, purchasing new flooring is about more than just replacing old carpeting or worn-out wood. Flooring shoppers take an ever-wider array of lifestyle-oriented factors and benefits into consideration. Flooring manufacturers and retailers may benefit from marketing and merchandising that organizes the options by desired benefits rather than by material.”

## Shopping for Home Decor - US

“Most consumers buy home décor to update the look and feel of their homes and many also buy home décor simply to treat themselves. As consumers are so inclined to buy for themselves/their homes more often, retailers should focus on encouraging more impulse buys in this category. Showcasing new ...

## Snowsports - UK

“Aside from growing the snowsports customer base as a whole, complimentary pre-season and post-season lessons in the UK could also aid brand loyalty by tying a customer in to a given brand’s ecosystem. Operators could take a more hands-on approach and have their own reps or instructors leading or contributing ...

## Soup - US

“Although more than eight in 10 respondents agree that soup is a healthy meal option, many also agree that prepackaged soup contains too much sodium and too many artificial ingredients and preservatives. Brands should work to equate wholesome ingredients with nutrition and flavor, and deemphasize low sodium content because it ...

## Suncare - Brazil

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.

## Shampoo, Conditioner and Hairstyling Products - US

“The haircare category has experienced steady gains, though sales of styling products and treatments have struggled. Styling products and treatments that engage men and an aging population as well as reinforce healthy looking hair should help boost segment sales.”

## Smartphone and Tablet Gaming - UK

“Mintel data strongly imply that in recent years, smartphone usage was exceptionally high for many activities – including gaming – not because consumers instinctively enjoyed carrying out the activities on their phones, but because the small-screened devices were – in the absence of tablets – the best available option for ...

## Soap, Bath and Shower Products - China

“Retailers need to ensure there is enough in-store marketing to recruit new shoppers day in, day out. Cross-category brand extensions and creating limited edition ranges can leverage consumers’ ‘infidelity’ behaviour and capitalise on shoppers’ desire for newness and excitement.”

## Spectator Sports - UK

“App developers should now look to create customised apps to facilitate consumers’ unique second-screening habits. Broadcasters could develop bespoke apps to accompany their televised events; letting users pull in content from social media, sports news websites, or even from completely unrelated sources.”

## Television and Online Video Ads - US

“Education about SPF is vital to increase usage – the more confident consumers feel about the right SPF level for their skin the more likely it is for them to use sun protectors. Formulations that dry quickly on the skin and easy-to-apply products are highly appealing to them especially to ...

## **The Private Label Household Care Consumer - UK**

“The finding that such large proportions of people have noticed improvements to own-label household care products in terms of quality and selection in recent years gives grounds for optimism, as does the number of people who think further improvements would tempt them to buy more own-label versions of products. Raising ...

## **The Shopping Experience of Hispanic Consumers - US**

“When Hispanics find a good deal, regardless of their age, income, or level of acculturation, they are eager to tell their families and friends about it. Retailers who can identify the needs of this segment and act accordingly may be able to count on Hispanic consumers as valuable allies to ...

## **Trends in Ecotourism - Europe**

“The commonly held perception of ecotourism is that it is a large and growing sector, both in terms of arrivals and income generated ... the indicators however point to a decent, though less optimistic market.”

## **UK Retail Rankings - UK**

“Retailing is changing. It's not as simple as there being online competition, but more that online and mobile technology is making customers much better informed. So retailing is becoming ever more challenging and consumers less forgiving of retail shortcomings. The historic strength of a brand is no longer enough ...

## **Varejo de Alimentação e Bebida - Brazil**

“O setor de varejo de alimentos e bebidas no Brasil deverá crescer de R\$ 366 bilhões em 2013 a R\$ 554 bilhões em 2018, um crescimento total de R\$188 bilhões

“The television ad industry is quietly being reshaped to include superior audience metrics, to provide addressable ads, and to escape from DVR-based fast-forwarding.”

## **The Shopping Experience of Black Consumers - US**

“Black consumers shop a wide variety of stores – from Walmart to Barney’s New York. This is not a one-size-fits-all consumer. Marketers need to better understand the different consumer segments within the Black community and how each segment is unique and has different expectations when it comes to the shopping ...

## **Traditional Toys and Games - US**

“Shoppers are looking beyond price and are willing to pay a slight premium in exchange for quality and a great toy-shopping experience. Toy buyers’ pre-planning stage, an essential part of shoppers’ path to purchase, is an important opportunity to actively engage children and adults. Brands and retailers could leverage children ...

## **UK Retail Briefing - UK**

Each month Mintel’s UK Retail Briefing concentrates on a particular sector or market. This month’s focus is on e-commerce.

## **US Outbound - US**

“US consumers’ mindsets have been somewhat altered in austere times, when financial pressures intensified demand for lower-budget holidays, last-minute deals and the pursuit of value for money. In 2014, many potential US travellers are facing high costs of living and remain focused on getting value for money.”

## **Vehicle Financing - US**

“The overall stability in the retail credit markets means vehicle financiers have access to cheap credit to lend at competitive rates. As the market for low interest loans has become saturated in the super prime and prime risk



(51%), semelhante ao índice de crescimento de 45,3% entre 2008 e 2013.

## Womenswear Retailing - China

“Consumers are becoming more sophisticated and individualistic, which is forcing retailers to adapt to an increasingly diverse consumer market. This is creating opportunities for the development of more sub-brands aimed at different consumer lifestyles, life stage and price points. Adapting to new market conditions will become even more important as ...

## 女装零售 - China

“中国的女装零售市场自2008年起稳步增长，这主要归功于中国消费者平均收入和人均消费能力的持续提高、零售连锁店的迅速扩张和在线零售的快速发展。尤其是在线零售，为该市场带来了极大的增长动力，但是由于其折扣幅度更大，也给零售商带来价格压力；同时，运营店铺的成本上升，这也挤压了公司的利润空间。”

— 郭马修（亚太研究主任）

## 香皂、沐浴和泡澡产品 - China

香皂、沐浴和泡澡产品零售市场在2013年继续延续此前的强劲增长势头，销售额高达217.13亿元人民币。科技进步（如移动购物、平板电脑和互联网普及率的提高）带动了在线零售业的增长。同时，利用中药的产品创很成功。

tiers, increasingly, financiers are looking mostly toward nonprime and the higher end ...

## 中国消费者——拥抱变化 - China

“企业因此需要重新调整其产品和服务，以满足大众消费者的需求，而不是仅仅着眼于可赚利润更客观的消费者。消费者对健康生活方式的关注和追求是影响其消费的另一重要因素。平均收入的不断增长意味着中国人的可支配收入更多，日益愿意为更优质的食物和饮料、非处方药和药品、度假等多种产品和服务买单，从而改善其生活方式。”

## 牛奶和调味奶 - China

“2013年牛奶市场在众多兼并和收购活动继续其重组进程。与此同时，中央政府为确保牛奶产品质量实施了更加严格的法规和规定，而这同样间接鼓励了市场洗牌。在不久的将来，小企业恐怕会面临日益增加的压力，从而导致市场的进一步整合。”

— 张一，研究分析师