

April 2015

American Lifestyles 2015: The Connected Consumer – Seeking Validation from the Online Collective - US

“Americans have endless choices to make on a daily basis and even the simple act of buying staple household products can be overwhelming to those who have yet to establish a routine or build brand loyalties. In a never-ending quest to buy the ‘best,’ consumers are looking to others’ ...

Automotive Retailing - Ireland

“Moving forward, as new car registrations increase, and the level of income consumers save declines, it could fuel a massive increase in the level of credit options sought for buying a new or used car.”

– **Brian O’Connor, Production Manager**

Baby Food and Drink - UK

“Brands could offer parents more reassurance about the healthiness of manufactured baby/toddler food by referencing more actively on-pack all the nutritional qualities the product has to offer, acknowledging key nutrients such as protein, calcium and carbohydrates.”

– **Colette Warren, Food and Drink Analyst**

Biscuits, Cookies and Crackers - UK

“After a period of impressive growth since its launch, the breakfast biscuits market lost momentum in 2014. That a quarter of users are interested in breakfast biscuits with a high fruit content, and a similar number are interested in high-protein versions, signals scope for further development.”

– **Aimee Townshend ...**

Brazilian Lifestyles 2015: Living Online - Brazil

“Interacting with others through email and social media and reading the news are the main activities Brazilians

Attitudes towards Low- and Non-alcoholic Drink - UK

“Cost is also a barrier hampering over-45s’ interest in the market and introductory offers or money-back guarantees could encourage trial to try to address the doubts about the quality of these drinks.”

– **Chris Wisson, Senior Drinks Analyst**

Baby Durables - US

“There are many opportunities for retailers serving the baby durables market to improve customer service. In a category like this where strong emotions can come into play, a human touch can go a long way. Retailers can stand out above the rest and earn customer trust and loyalty by providing ...

Betting Shops - UK

“Betting shops need to address some significant gaps in their customers’ sporting knowledge as a pre-requisite for the revival of horseracing.”

– **David Walmsley, Senior Leisure Analyst**

Black Consumers' Lifestyles and Entertainment - US

“Black consumers participate in a wide range of activities. Community, cultural and faith-based activities are front and center. There’s been a rise in entertainment expenditures over the last five years, and it’s expected to increase. There’s an opportunity for marketers to tap into this segment, particularly among single Millennials and ...

Bread - Ireland

“Consumer interest in healthy baked goods should inspire NPD activity. Incorporating wholegrain as well as ancient grains such as chia and spelt is further likely

perform online. However, internet usage has much more room for growth in Brazil, and providing trustworthy online reviews and enhancing anti-fraud tools are essential for the popularization of financial transactions online. The current ...

British Lifestyles 2015: At the Intersection of Tradition and Globalisation - UK

“Having basked in the glory of the London Olympics and the Queen’s Diamond Jubilee, Brand Britain now needs to figure out how to capitalise on opportunities provided by the increased pace of globalisation and also address the unique challenges open markets present.

Car Purchasing Process - UK

“The new car market is currently experiencing one of its most buoyant periods in recent times with sales reaching a new high in 2014. Yet despite such bravado the market is passing through a period of intense change which is forcing manufacturers and sellers to continually keep abreast of consumer ...

Car Usage Habits - China

“With fierce competition in the market, car marketers not only need to create more appealing stories and use them to impress consumers, but also need to make their marketing approaches less intrusive and more interactive. There is also a new and untapped opportunity for brands to catch consumer attention by ...

Chinese Spending Habits - China

“Chinese consumers are by no means ‘single minded’. They have developed sophisticated needs when consuming different categories which lead to varying preferences between Chinese and international brands. The key to the future success of Chinese brands lies in innovation and brand building while international brands will in general need to ...

Cleaning the Bathroom - UK

“Room exists in the market for brands to focus on the promotion of both products with multiple benefits to cater for the different aspects of bathroom/toilet

to enhance the appeal of the category.”

– **Sophie Dorbie, Research Analyst**

Canadian Lifestyles - Canada

“While the drop in oil prices was expected to give consumers extra cash for spending on other items, the record-high level of household debt is top of mind among Canadian consumers leading them to adopt a slightly more conservative approach to spending: focusing on paying off debts and making cutbacks ...

Car Purchasing Process - US

“With so many buyers using their cars for personal reasons, it makes sense to market the car as more than just a commuter-coddler. Proving that your car, truck, or SUV is versatile while loaded with the tech drivers’ desire is a good way to take advantage of market growth.” ...

Children's Social Care - UK

“The structure of the children’s social care market has inevitably been affected by the government-led public expenditure cuts over the last five years, as local authorities dictate the quantity of services provided and which companies provide them. However, the sector has avoided the widespread cuts seen in adult social care ...

Chocolate Confectionery - Canada

“Demographic changes in Canada are likely to impact the chocolate confectionery industry. While an aging population presents challenges, this may be offset a Millennial cohort entering into their family and therefore ‘prime chocolate eating’ years. Canada’s increasing reliance on immigration for population growth can also translate into an avenue of ...

Color Cosmetics - Brazil

“Many young female users of color cosmetics own more than 10 makeup items. These young women especially look for products to improve their skin texture, as well

cleaning and specialist products focused more on protection and bathroom maintenance. Focusing on the importance of a clean bathroom for good health and ...

Consumers and the Economic Outlook: Quarterly Update - UK

“Economic improvements are finally beginning to be felt at the consumer level. Falling prices of essentials and rising wages are helping incomes go further and there are indications that people are beginning to relax their budgets and spend on items and experiences that have been out of reach during the ...

Convenience Stores - China

“While shopping from convenience stores is almost universal among urban consumers, there is an increasing need for chains to adapt their products, services and stores to suit the individual needs of different customers and communities. As competition heats up in developed cities, and expands into new ones, developing business models ...

Cough, Cold, Flu and Allergy Remedies - US

“OTC manufacturers of cough, cold, flu, and allergy remedies have built-in demand: there is no shortage of cold, flu, and allergy sufferers. While providing relief is important, further investment should be made in finding more effective remedies and in promoting methods for reducing the transmission of infection. These efforts will ...

Dairy and Non-dairy Milk: Spotlight on Non-dairy - US

“Consumers want the healthiest beverage; however, many are not certain what that beverage is. Conflicting reports on health leaves consumers confused, and forcing heated segment competition. To resonate, milk manufacturers must continue to educate consumers.”

Department Stores - Europe

as products that claim to be waterproof.”

– **Juliana Martins, Beauty and Personal Care Analyst**

Contract Cleaning - UK

“With staffing expenditure accounting for up to three quarters of the cost base for some contract cleaning operators, minimum wage rises ahead of inflation will squeeze operating profits further.”

– **Ben Harris, B2B Analyst**

Convenience Stores - UK

“Convenience stores are most used in urban environments with the majority of consumers using c-stores close to their home. The millennial generation, aged 16-35, are the most likely to visit c-stores and also are the most frequent users of the format. This generation is increasingly migrating to urban areas and ...

Courier and Express Delivery - UK

“With the economic inefficiency of home delivery stretching margins for industry operators, there is a need to sway retail customers away from automatically selecting home delivery. But which alternative is most likely to do this?”

– **Ben Harris, B2B Analyst**

Department Store Retailing - UK

“The main department stores have been among the types of retailers leading the way in both expanding delivery options and click-and-collect as consumers are increasingly looking for the easiest and most convenient way to shop and receive their purchases.”

– **Tamara Sender, Senior Fashion Analyst**

Department Stores - France

This year, our exclusive consumer research asked French consumers:



This report series covers the five large Western European countries – the UK, France, Germany, Italy, and Spain.

Department Stores - Germany

This year, our exclusive consumer research asked German consumers:

Department Stores - Spain

This year, our exclusive consumer research asked Spanish consumers:

Destilados - Brazil

"O mercado brasileiro de destilados está deixando para trás a fase de grandes quantidades de produtos baratos, passando a ser definido por uma menor quantidade de produtos mais caros. As vendas de cachaça, em termos de volume, têm diminuído, enquanto que as vendas em valor continuam a subir, o que ...

DIY and Gardening Retailing - Ireland

"DIY and garden retail was more likely to comprise of products from the softer ends of the categories in 2014, with a focus on décor and plant/flowers perhaps indicating that consumers' understanding of DIY has increasingly transitioned towards creating a look rather than carrying out extensive home improvement works"

Estilos de Vida dos Brasileiros: Hábitos Online - Brazil

"Interagir com outras pessoas através de e-mail/mídias sociais, e ler notícias são as principais atividades online dos brasileiros. No entanto o uso da internet tem um potencial de crescimento ainda maior no Brasil e opiniões online confiáveis de produtos e serviços, além de melhores sistemas antifraude são essenciais para ...

Department Stores - Italy

This year, our exclusive consumer research asked Italian consumers:

Deposit and Savings Accounts - UK

"Although most savers say they are prepared to switch savings provider to receive a better rate, less than a third actually did so in the last year or so. With interest rates so low across the board, the cash benefit of switching accounts is usually marginal for all but the ...

Disposable Baby Products - US

"As long as birth and fertility rates remain flat, maximizing growth through 2019 may hinge on attracting consumers ready to invest more, on high-end products, which may include natural and customizable offerings. Opportunities for growth appear strongest with first time parents and Hispanics, whose attitudes reveal a level of interest ...

Eating Out: The Digital Consumer - UK

"As the mobile platform remains a relatively underdeveloped part of the restaurant market in the UK, there is much scope for operators to use smartphone apps to push more impulsive eating out habits, such as through 'push' marketing techniques."

European Retail Briefing - Europe

This month ERB includes:

Frozen Snacks - US

"The frozen snacks market continues its relatively flat performance of recent years, as consumers find other snacking options increasingly palatable in terms of convenience, flavor, and nutrition, leaving frozen snacks relatively few new consumer bases to mine. Households with children remain the \$4.5 billion category's key audience, but growing ...

Gift Registries - US

"The demographic groups most interested in creating registries are also the most digitally connected, but they are split in preference between online and in-store registry experiences. Therefore, gift registries are prime candidates for reaching across the digital and brick-and-mortar gap to create seamless retail experiences regardless of which channel customers ...

Infant Milk Formula - China

"There is a large portion of mums who tend to focus on combining infant milk powder products with other products for an optimal baby diet. Moreover, close relatives and online consumer reviews are regarded as more trustworthy than product experts in influencing the purchasing decisions of certain brands through certain ...

Maquiagem e Esmalte para Unhas - Brazil

"O mercado de produtos de maquiagem e esmalte para unhas cresceu 8% entre 2013 e 2014, o que representa 2,2 pontos percentuais a mais que de 2012 para 2013. Algumas razões para esta alta em 2014 foram (além da crescente ascensão da classe média e da mulher no mercado ...

Milk and Flavoured Milk - China

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.

Full Service Restaurants - Casual, Family and Fine Dining - US

"Foodservice operators, including full service restaurants, have been focusing mostly on Millennials, but there are other demographics that also offer lucrative opportunities, such as Baby Boomers and Hispanics. Since price is still a consideration for so many of the younger population, it makes sense to focus on those with more ...

Hispanic Lifestyles and Entertainment - US

"While Hispanics spend their 'me' time, if any, at home, mostly consuming content, out-of-home activities typically involve friends and family. In this context, Hispanics look for events or activities with them in mind. If friends and family are not on board with the idea, Hispanics may simply move on to ...

Loyalty in Financial Services - Canada

"The preference of high income earners for unique/non-purchasable rewards is an opportunity for marketers to think out-of-the-box and come up with creative rewards which may not be materially extravagant, but appeal to the status conscious."

– Sanjay Sharma, Senior Financial Services Analyst

Marketing to Kids - US

"Today's kids are the true digital natives; they do not remember a time without smartphones and constant connectivity. Modern kids can be difficult to impress and even more difficult to captivate."

Millennials and Finance - US

"Millennials are young and in the beginning stages of establishing themselves, their households, and their families. Their needs at this time are quite specific and revolve largely on learning how to manage their day-to-day finances. Institutions that can best help them with these most fundamental are likely to be those ...

Mobile Phone and Tablet Accessories - US

"As mobile hardware and connectivity increasingly become central to consumers' lives, a wide variety of accessories are being purchased to facilitate usage. Looking forward, sales will be driven not only by a desire for necessities such as cases and chargers, but also by products that increase functionality, such as portable ...

Mortgage Advice - UK

"The Mortgage Market Review (MMR) has tipped the scales in favour of advised sales. Increased demand following the pension reforms is set to create further opportunities for advisers. However, the housing shortage means younger consumers are pushed a step further away from affording their first home. This creeping marginalisation of ...

Pasta, Rice and Grains - US

"The pasta, rice, and grains categories face stagnant sales due to perceptions that, in general, they are high in gluten and carbohydrates and the mixes may be too processed. Brands must provide more healthful options to spur sales. Emerging grains can help breathe new life into this category, with additional ...

Potable Water and Sewerage - UK

"The estimated cost of implementing the Water Framework Directive (WFD) is around £30 billion over 43 years, of which around 40% will be accounted for by water companies' direct infrastructure and management spending. The WFD will continue to be a key driver for capital investment in the water and sewerage industry ...

Saving and Investing for Children - UK

"Due to the initial government incentivisation Child Trust Fund ownership levels have remained considerably above those for Junior ISAs. However, as of April 2015 CTF owners have the option to switch their accounts to JISAs. As the JISA market is far more

Mobile Phones - UK

"The factors determining consumers' choice of mobile phone will become increasingly centred around the capabilities of the operating system used, as more people consider compatibility with their favourite services, software programmes, and integration with their 'Internet of Things'."

Package vs Independent Holidays - UK

The overseas holiday market has a positive outlook for 2015 and beyond. Package holiday volumes are rising at a higher rate than independent holidays. Consumer confidence improvements will see increases in the value of holidays, however habits developed during the recession to save costs continue to be part of the ...

Personal and Stakeholder Pensions - UK

"Concerns have been raised that the new pension freedoms will lead to many making poor decisions when they come to access their pensions in retirement. However, Mintel's research suggests that consumers should be given more credit. Many are aware of the potential dangers and will likely cautiously evaluate their options ...

Residential Flooring - US

"An improving economy and a strengthening home renovation market have helped the \$21 billion residential flooring market notch steady gains since 2010. Looking ahead, further improvement in the broader economy should help drive continued growth. While the need to replace old or worn out flooring is the most commonly cited ...

Seasonal Shopping (Autumn/Winter) - UK

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competitive than the now-stagnant CTF market, this is ...

Shampoo, Conditioner and Hair Treatment - China

"Given consumers' repertoire behaviour and brands' high churn rate (ie the percentage of shoppers buying one brand that discontinue buying in a given time period), brands need to continue launching new products and upgrading current line in order to attract new users and win back lapsed ones. Mintel has highlighted ...

Snacking Motivations and Attitudes - US

"Nearly all Americans snack, especially younger adult consumers who also are more likely to have increased their snacking frequency over the last year. Snacking may also be replacing standard daily meals, and this behavior is likely to continue. Americans claim a preference toward healthier snacks, specifically those with simple ingredients ...

Spirits - Brazil

"The Brazilian spirits market is slowly shifting from high volumes of cheap products to lower amounts of more expensive products. Volume sales of cachaça have been in decline while value sales keep going up, meaning more premium and craft products are being purchased. At the same time, vodka and whiskey ...

The Role of Trust in Financial Services - US

"The FSI's (financial services industry) reputation has been damaged since the recession hit in 2008-09. Consumers quickly blamed the industry for the crisis and ever since have had a hard time trusting its products and services. However, not all sectors were negatively impacted; credit unions continue to attract more consumers ...

UK Retail Rankings - UK

"Retail is changing faster than ever. In food retailing the 60 year trend to ever larger stores has come to an abrupt

Shampoo, Conditioner and Hairstyling Products - US

"The shampoo, conditioner, and hairstyling product market is stable, posting steady gains of 2-3% on a yearly basis since 2011, with similar growth trends expected through 2019. Current hairstyle trends and consumer perceptions of having healthy hair are driving sales of conditioners, shampoo alternatives, and smoothing products. Looking forward, category ...

South Korea Outbound - South Korea

"The maturity of South Korea's outbound market is a reflection of the republic's advanced economy and the high level of per-capita income enjoyed by citizens. A large proportion of South Koreans are highly educated, fuelling aspirations to travel further afield and experience new cultures. Outbound travel is becoming more sophisticated ...

The Brazilian Hotel Sector - Brazil

"Soaring property prices have made it virtually impossible to develop new hotels in the primary markets due to extremely elevated land values ... most of the main hotel developers in Brazil are real-estate developers who can earn higher margins in the residential market ... nevertheless, there are windows of opportunity ...

UK Retail Briefing - UK

Each month Mintel's UK Retail Briefing concentrates on a particular sector or market. This month's focus is on Automotive Fuel Retailing.

White Goods - UK

"Large domestic appliances are not a 'take home today' purchase and so most people will order them for home

halt, throwing into doubt the investment strategies of all the market leaders and forcing some very painful re-assessment of long term strategies. Non-food retailers are adjusting to ...

Women's Haircare - UK

"The women's haircare market is challenged by changing product usage, with traditional styling products falling from favour and natural botanical oils threatening leave-in conditioners and serums. Inspiring an older female audience and expanding product repertoires are essential for returning the market to a faster pace of growth."

便利店 - China

"尽管城市消费者在便利店购物的现象无处不在，但连锁店需要不断'升级'产品、服务和店面，以满足不同消费者和社区个性化的需求。随着竞争在发达城市日益加剧，竞争模式日新月异，创造适合当地需求的商业模式的重要性与日俱增。"

婴幼儿配方奶 - China

"很大一部分妈妈们喜欢将奶粉与其它婴幼儿产品混合来喂宝宝，以获取最优的婴幼儿饮食搭配。另外，相比专业人士的意见，消费者在购买配方奶时更信任周围亲属的意见和消费者的在线评论。市场上也出现了“只卖洋品牌”的网站，这些网站的产品全都仅限海外采购。中国社会/电商行业的日益成熟发展，加上国产品牌爆发的丑闻继续发酵，这些因素都将推动这些网站业务的持续增长。"

牛奶和调味奶 - China

"除了利用洋品牌身份的优势，国际品牌还需要更加关注中国消费者的需求，进行包装本地化革新，并在市场营销过程中提供更多品牌相关信息以吸引消费者。此外，专为青少年设计的牛奶也是有待品牌抢占的空白市场。"

delivery. Plus they are mainly products which have definite specifications, making them easy to find online and for people to compare prices. So online shopping has grown rapidly and we estimate ...

中国消费者消费习惯 - China

"中国消费者绝不是'思想简单'的消费者，他们在消费分门别类的不同产品的过程中形成了错综复杂的消费需求，这就导致他们对国产和国际品牌产生不同程度的偏好。本土品牌能否在未来取得成功的关键在于创新和品牌创建，而整体来看，国际品牌需要致力于产品或服务本地化，以更好针对中国消费者特别的意向和消费偏好。"

- 顾菁，高级研究分析师

头发护理：洗发水，护发素及其它头发护理品 - China

"由于消费者具有多品牌使用行为习惯，加上品牌的客户流失率保持高位（具体来说，一段时期内，消费者购买某种品牌而放弃另一品牌的百分比），品牌需要不断地推出新产品、升级现有产品线，从而吸引新客户，维系流失老客户。英敏特强调众多消费者在尝试新的头发护理产品时，往往为功能性需求和信任感所动。"

- 陈文文，高级研究分析师

汽车使用习惯 - China

"在竞争激烈的市场中，汽车营销人员不仅需要利用更引人入胜的故事打动消费者，而且还应该采取更无声细腻、有趣互动的营销方式。此外，解决驾乘车时面临的健康问题是品牌可以探索的新兴空白商机。"