

July 2014

### Air Care - UK

“Nearly nine out of 10 people use at least one type of air freshener at home but significant scope exists to encourage people to use a wider range of products and use them more regularly, such as for scenting more rooms or using air care products for a wider variety ...

### Baby Food and Drink - China

“Vegetables, organic ingredients, and minimising packaging size to control nutritional intake could be the springboard for baby food producers to expand penetration among younger parents.”

### Black Consumers Attitudes toward Advertising - US

"Many marketers are shifting their dollars away from the Black consumer segment, while others are moving their initiatives away from traditional to digital. Since Blacks are receptive to advertising and want to see more targeted to them, they are paying attention to which companies demonstrate a sincere commitment and understand ...

### Carbonated Soft Drinks - Canada

“Natural sweeteners such as stevia may help to reduce these perceptions of artificiality and help to boost consumption among Millennial females.”

- **Warren de Lima, Senior Food and Drink Analyst**

This report looks at the following issues:

### Chocolate Confectionery - China

“Product innovation is key to business growth, since consumers are open towards new and luxurious chocolate flavours and are willing to pay extra for chocolates with health-enhancing benefits. Meanwhile

### Air Conditioning (Industrial Report) - UK

“With large elements of the market dependent on construction activity in commercial and industrial sectors, the market has inevitably suffered a difficult period post 2008. However, the prospects are now for strong growth over the next five years as construction in important sectors, such as factories/warehouses, offices and retail ...

### Beer - Brazil

“Beer is the favorite alcoholic beverage in Brazil. The country is by far the largest beer market in Latin America and the third largest market in volume in the world. Brazilians drank the equivalent of 66 liters per capita last year.”

– **Andre Euphrasio, Research Analyst**

### Butter, Margarines and Oils - US

"As consumers increasingly turn to butter over margarine/spreads for its natural appeal, spread brands are challenged to provide products that more closely align with consumer needs. Spreads that contain only natural ingredients, without artificial preservatives or additives, are likely to hold the most appeal for consumers who dislike the ...

### Cerveja - Brazil

"A cerveja é a bebida alcoólica favorita do brasileiro: no ano passado, foram consumidos o equivalente a 66 litros por pessoa. O Brasil é, de longe, o maior mercado de cerveja da América Latina e o terceiro maior mercado em volume do mundo.”

– **Andre Euphrasio, Analista de Pesquisas**

### Civil Engineering (Industrial Report) - UK

“The prospects for the civil engineering sector remain strong over the next five years, with development significantly exceeding GDP growth. Development is set

from an execution perspective, manufacturers could resort to launching seasonal flavours and packaging to both maintain consumer excitement and attract new ...

## Collective Investments - UK

"To many people, the very word 'risk' implies that they are likely to lose their money. This needs to change. One of the most powerful things that providers can do to reduce people's anxiety about risk, is to encourage them to think long term."

## Colour Cosmetics - UK

"As trends and behaviours continue to evolve in the colour cosmetics market, opportunities arise for brands to appeal to new consumers including older women, as well as inspiring a higher spend per product with technological advancements such as 3D printing and individually tailored products."

## Consumer Attitudes Towards Debt - US

Despite a recent increase in residential mortgage and auto vehicle lending, consumers remain cautious about taking on new loans, while lenders remain cautious about extending new credit. Consumers are particularly reluctant to borrow on their credit cards or against the equity in their homes to finance spending. At the same ...

## Cookware - US

"The cookware market has continued to grow modestly due to consumers' continued need for cookware and bakeware to facilitate meal preparation tasks. Accelerated category growth can be achieved by focusing on the emotional benefits of cooking as well as positioning cookware ownership as a means to enhance one's skill and ...

## Deodorants - Brazil

to be driven by the buoyant transport and electricity sectors, which are set to attract significant investment over the next decade."

- **Claudia Preedy, Industrial Analyst**

This ...

## Color Cosmetics - US

"The color cosmetics category can be complex – the number of products, claims, and the introduction of multitasking formulas can overwhelm even the savviest of make-up users. As a result, women are looking for guidance from a variety of sources including both online and in-store."

## Consumer Attitudes Towards Debt - UK

"A good, fairly priced payment protection product should be a positive proposition for most consumers, especially those vulnerable to difficulty, such as people with poor health, insecure employment or limited finances."

## Consumers and The Economic Outlook - Quarterly Update - UK

"Although people are still more confident than they were in 2013, Mintel's data suggests that they're not entirely convinced by the economic revival. Across all three key measures (current situation, impact of the slowdown and how they expect their finances to fare over the next year), sentiment was slightly more ...

## Credit and Loan Products - China

"In the near future, the biggest opportunity still lies in loans for financing large household purchases. Consumers want to have more say in the loan design, which is currently the biggest gap in the market."

## Desodorantes - Brazil

“For Brazilians, deodorants are a personal care ‘staple’ with most people using it more than once a day. Despite its almost universal use, the market continues to show a significant growth, driven mainly by the consumer’s desire for higher value-added products. Innovations such as non-staining formulations, technology that provides superior ...

## Dining Out: The Restaurant Decision-Making Process - US

“The US restaurant industry is so large and mature that it’s increasingly difficult to carve out opportunities for growth. Operators must focus on differentiation, not only with menus but overall positioning. The answer may lie in even greater customization, with tailored restaurant concepts for niche audiences and for different day ...

## E-Commerce - Europe

Mintel’s E-Commerce – Europe, July 2014 covers the 19 leading economies of Europe. In total these countries account for around 95% of all European retail sales, excluding Russia. The remaining countries are either too small (eg Luxembourg) or are not sufficiently well developed to warrant detailed coverage (eg Romania and ...

## E-Commerce - Germany

Mintel commissioned extensive consumer research in the UK, Germany, France, Italy and Spain.

## E-Commerce - Spain

Mintel commissioned extensive consumer research in the UK, Germany, France, Italy and Spain.

## Eating Out Trends - Brazil

“It is important for the out-of-home food sector to steer away from market ‘truths’ and look for hidden opportunities. If everyone believed in clichés, such as ‘women prefer to eat more healthy food, compared to men,’ ‘young consumers only eat on the cheap,’ ‘restaurants only need to offer ...

“O uso de desodorante é visto pelos brasileiros como parte da rotina básica de cuidados pessoais, e a maioria das pessoas o usam mais de uma vez ao dia. Apesar do seu uso quase universal, o mercado continua a mostrar um crescimento significativo, impulsionado principalmente pela demanda dos consumidores por ...

## Drinking Out of the Home - UK

“Some 44% of out-of-home drinkers state that they prefer to drink in venues which offer locally produced drinks. Pubs can use local products to entice visitors but communicating the availability of these, such as via external signage, is central to reaping the benefits.”

## E-Commerce - France

Mintel commissioned extensive consumer research in the UK, Germany, France, Italy and Spain.

## E-Commerce - Italy

Mintel commissioned extensive consumer research in the UK, Germany, France, Italy and Spain.

## E-Commerce - UK

“We think consumers are likely to become more demanding and that those retailers that innovate relentlessly - such as Amazon – are best-placed to win shoppers’ loyalty.”

- John Mercer, European Retail Analyst

## Eating Out: The Decision Making Process - UK

“Recommendations from family/friends are key influencers in venue choice, whilst online review sites populated with customer-generated content are also now popular among diners. Operators are encouraged to

## 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.

## Feminine Hygiene and Sanitary Protection Products - UK

“Value sales in the sanitary protection, feminine hygiene and adult incontinence market are relatively protected due to the necessity of the products included. However, there is an opportunity for brands in each segment to now seek further growth by offering new products that address many of the concerns women have ...

## Footwear Retailing - UK

“Footwear specialists are competing with non-specialists such as grocers, clothing chains and department stores. Those specialists that are succeeding against this competition are making themselves real destinations for fashionable footwear. Those specialists with a broader positioning have fewer points of difference, so shoppers have fewer reasons to choose them over ...

## Furniture Retailing - US

“Unmotivated by sales messages, afraid of buying online, and reluctant to spend another \$1,000 on furniture before they absolutely have to, furniture retailers face numerous challenges in getting consumers back into stores before their current furniture is worn out. Retailers must find new ways to motivate consumers to visit ...

## Gastrointestinal Remedies - US

“GI remedy sales are expected to remain flat in the coming years. To boost sales and address consumer tendency to not treat or use alternative remedies, companies must look to brand extension within the natural realm, improve consumer education, and

embrace the new era and promote peer-to-peer reviews and, where possible, create their own legion of brand ambassadors.”

## Family Car Buying - US

“New family car sales are outpacing the general market due to an ongoing influx of first-time Millennial buyers who are beginning to form married couple families. Millennials have a slightly different take on the family car than non-Millennials do, by wanting a vehicle that is not only versatile but also ...

## Food Packaging Trends - US

“Shoppers remain concerned about the safety of food packaged in plastic or cans, which creates an opportunity for manufacturers to be proactive about offering information to alleviate these concerns. This may include information about packaging materials, or ingredient sourcing, as well as sustainability initiatives.”

– **Amanda Topper, Food Analyst**

## Fragrances - China

“Most consumers only wear fragrances on special occasions. Smart brands know to tie up their fragrance story based on special occasions. Fragrance concepts developed around emotions and mood could also be more appealing to women.”

– **Wenwen Chen, Research Analyst**

## Garden Products Retailing - UK

“Garden centres have developed robust strategies for compensating for the risks associated with peaks and troughs in demand caused by variable weather. We are seeing far more major garden centres investing in refits and extensions. More space in garden centres is sheltered from the weather, including areas where plants are ...

## Health Insurance - Canada

“Leveraging themes of peace of mind and risk avoidance are factors which could boost engagement with the market. The increased use of positive associations such as these could make Canadians think more positively rather than negatively about health insurance.”

leverage OTC remedies as a way to combat and prevent ...

## Healthy Dining Trends - US

“Healthy eating in America is not only a hot topic in the industry, it is also a source of growth (or growing pains) for many foodservice operators. Consumers are now highly knowledgeable about what types of foods they should be consuming, and which ones would best benefit their bodies. Along ...

## Healthy Lifestyles - UK

“Health, fitness and nutrition brands could promote the idea of longer-term health as an investment, with incremental steps taken every day, creating a virtuous circle of healthy habits for life.”

– **Ina Mitskavets, Senior Lifestyles and Consumer Analyst**

## Home Baking - UK

“As consumer spending rises, it is likely to become increasingly important for home baking companies to remind people of the benefits of baking in order to maintain consumer interest. Brands can leverage the relaxation associated with baking in their advertising campaigns, which is likely to resonate given that stress affects ...

## Hotels in Mexico - Mexico

“The image of all-inclusive resorts has changed 180 degrees since 10 or 15 years ago and the segment has left behind its prior classification as a low-budget down-market form of beach holidays.”

## Ice Cream and Frozen Novelties - US

“While more than half of frozen treat buyers express the importance of product price in their purchase decision, flavor rules. In practice, gelato (with its corresponding

## Healthy Lifestyles - Canada

“Providing incentives like free gym trials, online tools/apps, more affordable options for wearable tech and athletic gear, and increased well-being education could be avenues for both companies and health organizations which are looking to appeal to less affluent Canadians who would like to lead a healthier lifestyle.”

– **Jason ...**

## Hispanics and American Culture and Identity - US

“While the majority of Hispanics are speaking English and the influence of the American culture in their lives is strong, there are cultural differences beyond language that need to be considered when determining the most efficient way of communicating with them. In order to successfully communicate with Hispanics, it is ...

## Hot Drinks - Tea - Ireland

“With an ageing population meaning that adults are extending their working life, opportunities exist for tea brands to develop products to appeal to this market eg blends with energy boosting and invigorating properties.”

– **Sophie Dorbie, Research Analyst**

## House Building (Industrial Report) - UK

“The threat to the industry is the growing likelihood of an increase in interest rates, in turn leading to a rise in mortgage repayments. Mortgage lending rules are also being tightened as a consequence of the increasing risk of another housing bubble, making it harder for buyers to secure finances ...

## Marketing Financial Services to Small Businesses - US

“The strengthening economy is paving the way for small business growth, both because loans are becoming more plentiful and consumers have become more willing to

higher price point) has driven growth in the category in recent years."

## Marketing to Men - US

"Men are a broad consumer base that are increasingly being recognized by marketers. The emerging male consumption patterns can be attributed to both shifting societal norms as well as shifting demographics. Traditional gender roles continue to blur, and today's Millennial males buck tradition by taking on household chores that had ...

## Mobile Advertising and Shopping - US

"With smartphone penetration rising quickly through the late majority, brand spend on mobile ads and consumer spend on mobile shopping will both see radical growth."

## OTC Contraceptives - US

"Despite an uptick in sales from 2013-14, the contraceptives market is still up against several challenges. An aging population puts downward pressure on the market, as usage declines among older, monogamous couples. Furthermore, competition from distribution of free or low-cost contraceptives cuts into sales."

– Emily Krol, Health and ...

## PC Gaming - UK

"Of the 18 billion hours played on Steam games, more than half was taken by just six games. Some 37% of games have never been played at all, whilst 17% of all purchased games have been played for less than one hour. This hyper-fragmentation of attention, where consumers are interested ...

## Plastic Cards - Ireland

"The downturn of credit cards in issue in Ireland, and growth in the level of debit card usage highlights that

spend. Offering superior customer service and state-of-the-art technology will be crucial in financial services institutions' efforts to take advantage of the growing strength of the ...

## Marketing to Sports Fans - US

"Watching sports on TV is not going to be enough for today's young adult and teen fans. To keep them involved with sports, leagues will have to operate across all media channels, including those yet to be developed. This will likely require the cultivation of diverse revenue streams to reduce ...

## Occupational Health (Industrial Report) - UK

"The aftermath of the financial crisis had a contrasting impact on the occupational market. On the one hand, employees feared for their employment status as companies sought to cut costs by making redundancies, reducing absentee rates. However, this also increased the levels of presenteeism (attending work while sick), while the ...

## Packaged and Current Accounts - UK

"Tesco Bank has finally launched its current account offering. The account performs strongly in a number of areas, and will offer clients the chance to earn interest on balances. One of the main attractions of the newly launched account is the link to Clubcard points."

## Pet Food - US

"While pet ownership is down, this has not deterred pet owners from continuing to view their pets as family members, and treating them accordingly. The humanization of pets and their dietary needs continues unchecked, as pet food resembles more and more that which one would find on the grocery ...

## Public Expenditure (Industrial Report) - UK

increasingly Irish consumers are living within their means and reducing their reliance on credit. Moving forward this could see credit card providers add more incentives to their offerings to help ...

## Rail Travel - UK

“Fast growing tablet ownership, in connection with emerging superfast Wi-Fi, offers opportunities to provide bespoke online entertainment packages to travellers, for example by partnering with content providers such as Netflix, Spotify Premium, tablet magazine/newspaper publishers and e-booksellers.”

## Retailer Loyalty Programs - US

“While loyalty programs likely do not lead to complete loyalty to a specific retailer, many consumers are likely to change their shopping habits in order to earn incentives. However, there is also a significant demand for more meaningful rewards and easier ways of earning them, suggesting that consumers see a ...

## Sports and Energy Drinks - UK

“Brands in this market need to find new ways of convincing users of the safety and efficacy of their drinks. At the same time, it is necessary for them to identify new angles to engage prospective consumers. Drinks made from natural ingredients show strong potential with more than seven in ...

## Tea and Other Hot Drinks - UK

“Higher-caffeine teas could help brands increase usage by positioning the drink as an energy-boosting alternative to coffee while in hot chocolate, new formats would provide a platform for trading drinkers up.”

## Technology and Irish Tourism - Ireland

“With internet-enabled mobile devices playing an increasingly prominent role in how consumers experience holidays, Irish tourism companies should

“The public sector has long represented a major opportunity for private companies to sell products and services. With effectively no prospect of government spending falling to below 40% of UK GDP in the short term, the market is vast, and the drive for efficient service provision can only intensify with ...

## Researching and Buying Technology Products - UK

“Looking ahead, young consumers will find deals in new ways, opting in to receive alerts from the brands they are happy to engage with via their smartphones.”

## Sports and Energy Drinks - China

To sustain the growth, brands need to go beyond using vitamin enriched drinks as the only way to convey a healthy image for sports and energy drinks. Consumers’ concern over negative ingredients suggests there is potential demand for more products with natural ingredients, reduced calorie and are free from additives ...

## Sports Goods Retailing - UK

“While specialist sports goods retailers are not yet projecting their traditional in-store expertise online and through social media, closer links with participation facilities could extend their dominance of the shop-bought segment.”

– David Walmsley, Senior Leisure Analyst

## Tea and RTD Tea - US

“The healthfulness of tea has been heavily pushed through media and marketing. However, consumers’ focus may be switching away from health, which they have most likely come to expect from the category, and are now looking for flavor and product innovation to keep them interested.”

## Tendências em Comer Fora - Brazil

“Apesar da alta da inflação e dos juros terem tido um impacto negativo no setor de alimentação fora do lar no último ano, as expectativas em relação ao crescimento



look to make greater use of these devices' GPS capability. This could help to generate awareness of Ireland's less well-known sites and encourage consumers to venture off the beaten track for a ...

## Term Assurance - UK

"Increased mortgage lending in 2013 did not result in a corresponding increase in new term assurance sales. Regulatory demands have made cross-selling term assurance products less of a focus for intermediaries. Developing profitable and efficient direct-to-consumer channels will therefore become an increasingly important priority for providers in order to reduce ...

## The Private Label Healthcare Consumer - UK

"Improving financial situations could see people go back to branded products, after using lower-priced private label products during tough economic times. Growth of private label is therefore reliant on competitive pricing and innovations, in both product and packaging."

## Utility Capital Expenditure (Industrial Report) - UK

"The approach to infrastructure investment is in transition across the utility industry. Whereas spending in the past was mainly output-driven, future investment decisions will be more centred on innovation, asset optimisation and long-term outcomes. The rising pressure from industry regulators to reduce costs for consumers is a further challenge facing ...

## Whole of Life Insurance - UK

"Funeral price inflation, coupled with the continued squeeze on household finances, is posing a challenge in the over-50s market. Guaranteed acceptance plans offering increasing premiums can help mitigate the uncertainty over the real value of policyholders' future payouts. However, the key demographic faces the risk of not being able to ...

## 信贷产品- 中国 - China

do mercado são positivas, e a entrada de várias redes de restaurantes americanos no país só confirma essa previsão. Os estabelecimentos ...

## The Emergence of 'Free Independent Travellers' in Asia - Asia

"There can be no doubt that Asian travelers have become more mobile and adventurous over the last decade and are now exploring places that were once the preserve of the backpackers and action-seeking Europeans."

## UK Retail Briefing - UK

Each month Mintel's UK Retail Briefing concentrates on a particular sector or area of the market. This month we look at fuel retailers in the UK.

This retail review looks at:

## Washers and Dryers - US

"Bolstered by continued modest improvement in the economy and a strengthening housing market, sales of washers and dryers have turned in solid sales performance since the end of the recession, rising to an estimated \$13.1 billion in 2014."

- John Owen, Senior Household Analyst

## Yogurt and Yogurt Drinks - UK

"That half of users of yogurt/yogurt drinks express concern about the sugar content in these highlights the need for the industry to tackle this issue. Trends towards clearer on-pack labelling in the UK will shine more light on the sugar content of yogurts."

## 婴幼儿食品和饮料 - China



“从2008年1月到2014年4月，中国的消费性贷款额从5.2万亿人民币增长到21.1万亿人民币。约三分之二的家庭贷款是消费性贷款，其中按揭贷款仍是家庭贷款的主体。但是鉴于从2008年到2013年短期消费性贷款以42%的年均复合增长率扩张，所以下一个十年增长预计将由短期消费性贷款拉动，英敏特预测，到2020年总消费性贷款将占68%的国内生产总值，这个比率在2013年仅为35%。”

## 巧克力 - China

“产品创新是推动增长的关键，消费者乐意尝试不同的巧克力新口味，并愿意为具有健康功效的巧克力支付更多。在实际执行层面，制造商可以推出季节性口味和包装，以维持消费者的兴趣和吸引新用户购买。”

- 顾菁（高级研究分析师）

## 香水 - China

“正如很多消费者购买香水作为礼物，很多城市消费者购买香水自己使用。”

品牌可以通过将香水与送礼场合相联系，着重突显香水作为礼物的高档品位和价值，获得利益最大化。这些场合包括圣诞节、情人节、母亲节。同时，鼓励消费者根据不同场合自己使用香水，如约会、旅行以及婚礼。”

- 陈文文，研究分析师

“婴幼儿食品转趋家中自制与中国多个经济和社会顾虑有着不可分割的联系：包括经济生产力放缓、婴幼儿配方奶监管加严和食品安全担忧。但是，越来越多的包装婴幼儿新产品应该会受益于计划生育政策的放宽。为了提供合适的产品，以鼓励妈妈们尝试新品种或保持忠诚度，婴幼儿食品公司需要评估复杂多样的消费模式，包括购买障碍、对特定营养益处的兴趣和包装设计。”

- 刘欣琪（研究分析师）

## 运动和能量饮料 - China

“品牌应该突破陈规，仅通过宣称运动饮料和能量饮料富含丰富维他命、传递健康之水的产品定位是远远不够的，敢于创新才能保持强劲的增长态势。消费者对其部分成分的持怀疑态度表明天然原料制成的饮料、低卡路里饮料及不含人工添加成分的饮料的市场需求潜力巨大。”

- 严以领，高级研究分析师