

July 2016

## A Economia Brasileira - Mudanças nos Hábitos de Economia e Gasto do Consumidor - Brazil

“A recessão econômica, com aumento da inflação e das taxas de juros, acesso mais restrito ao crédito e desemprego em alta, tem levado os consumidores brasileiros a mudar seus hábitos de gasto e economia. Ao mesmo tempo em que estão buscando melhores ofertas, planejando suas compras e cortando itens supérfluos ...

## Advertising: Mobile, TV and Internet - US

“The advertising landscape is more complex than ever as consumers now relate to ads across television, online, and mobile platforms. Consumers can be influenced by marketing messages, but only if the message is received over the most strategic platform.”

## Airlines - US

“The US airline industry is enjoying a nearly unprecedented stretch of success, with 2015 profits nearly triple those of 2014. Low fuel prices and relatively strong demand indicate that 2016 will show similar results. The share of Americans taking to the skies has remained unchanged for the past five years ...

## B2B E-Commerce - UK

“The prospects for the B2B e-commerce market are very strong. There is a significant disparity between the number of companies undertaking either web or EDI sales and those using these systems for purchasing - indicating significant further potential. However, not all B2B sales can be undertaken through website sales, and while ...

## Beer - Brazil

“Apart from the economic crisis, which affects their pockets, consumers are worried about health issues. Providing more information about responsible drinking as well as nutritional information could be a way to get around such issues. Creating healthier beers might help

## Adventure Tourism in Africa - Africa

“Adventure tourism is one of the largest niches in the global tourism industry and for several years, interest has been consistently growing amongst a broadening consumer base, which demands fulfilling and enriching experiences while on holiday. The sector is ideally suited to the challenge of leisure travel in Africa and ...

## Air Care - UK

“Value sales in the air care category have stalled somewhat, but market conditions look set to ensure it returns to growth. There is an appetite for innovation in the category, and potential for product development of more premium scents and formats to boost the market, building on the positive impact ...

## Alcoholic Drinks Review - UK

“The online channel is likely to benefit from the craft boom in particular, providing an alternative sales outlet for brands other than venues such as pubs/bars and supermarkets.”

– Chris Wisson, Senior Drinks Analyst

## Banking Channel Usage and Preferences - Canada

“The merging of digital and human channels in the form of chatbots and robo-advisors is the next key development in the world of banking channels.”

## Black Consumers and Beauty Products - US

“The growing Black population, which includes a large share of iGeneration and Millennials, and interest in natural products are key positive drivers. Nurturing

introduce consumers who do not want to drink alcohol. Operators ...

## Body Care and Deodorant - US

The \$6 billion body care and deodorant market has shown fairly stable growth in recent years. Near universal routine usage of deodorant and body care presents both opportunities and challenges for future growth. Spray formats, natural formulations, and the integration of added benefits have propelled consumer interest in the market ...

## Breakfast Eating Habits - UK

"Breakfast is an almost universal occasion. While 55% of people eat it at home every day, almost half (49%) sometimes eat breakfast out of home. That 28% do so once a week or more demonstrates that this is an established habit for a sizeable minority.

"Barriers remain, however, with the ...

## Bridging Loans - UK

"Bridging has provided a vital resource to those looking to secure immediate finance. The industry's substantial growth over the last seven years suggests that the scope for innovation and collaboration between lenders and brokers will expand alongside awareness of how bridging finance can be useful in a range of scenarios ...

## Cerveja - Brazil

"Além da recessão econômica, que afeta os rendimentos e o poder de compra, os consumidores brasileiros estão preocupados com questões de saúde. Fornecer mais informações sobre o consumo responsável e informações nutricionais pode ser uma forma de contornar tais questões."

## Colour Cosmetics - UK

"New products, beauty bloggers and innovative campaigns will all ensure sales in the colour cosmetics market remain buoyant in 2016. Women are interested

highly engaged consumer segments will also be important for market growth."

## Breakfast Eating Habits - Motivations and Attitudes - Canada

"The competition to be the go-to option at breakfast has never been fiercer as retail manufacturers and foodservice operators battle for share of stomach in the morning. While most Canadians look to breakfast to help them start their day off right, "right" has different meanings for different consumer segments, as ...

## Breakfast Foods - China

"Chinese consumers have developed hierarchical needs for breakfast. Besides the basic needs for satiety and nutrition, people are willing to trade up to products and services that can help them save time and add convenience to the eating process. Meanwhile they have started looking for super ingredients with energy-boosting functions ...

## Business Traveller - UK

"Brands – whether travel management companies or direct suppliers – need to increasingly respond to the personalised needs and preferences of business travellers, particularly the travel-literate and tech-savvy Millennial generation who are the core business travel demographic."

– John Worthington, Senior Analyst

## Colour Cosmetics - China

"China's colour cosmetics market is still an emerging market where most users' routines are not fixed. Daily make-up wearers' numbers have declined compared to 2015. Therefore, converting non-make-up wearers or irregular make-up wearers into regular make-up wearers is more important than up-trading regular users."

## Commercial Mortgages - UK

"In the wake of the EU referendum decision, some lenders have stated that it remains too early to announce any changes to their respective mortgage offerings,

and engaged in the market, enjoying browsing stores and reading marketing communications. Understanding the needs of demographic groups, such as traditionally minded seniors and ethnically diverse Millennials ...

## Consulting Engineers - UK

“Consultants’ income derived from the roads/rail sector is expected to continue to account for the largest share of the market. The sector is set to be driven by major rail projects and the government’s renewed commitment to road spending. However, the recent referendum vote to leave the EU may ...

## Consumers and Credit Cards - US

Consumers can be influenced by strategic marketing messages during the credit card application process as they compare how various rewards and incentive programs meet their individual needs. Demographics play a role in which card types are most likely to meet their criteria and how marketers might alleviate any concerns about ...

## Credit and Loan Products - China

“How credit and loan products could be designed and operated is more influenced by regulators than providers. In China, benefiting from the Inclusive Finance policy, internet finance players like peer-to-peer lending firms, internet-based banks and equity crowdfunding platforms are thriving. Consumers are enjoying the convenience resulting from the competition between ...

## Deli and Hot Foods Counters - Ireland

“Consumers are increasingly demanding both more transparency from foodservice providers in regards to nutritional information, as well as healthy options when buying food from deli and hot food counters. Exploiting the protein diet trend might help to boost sales at deli and hot food counters.”

– **Brian O’Connor, Senior ...**

## Digital Trends Summer - UK

while others have already changed their rates. However, the appeal of commercial and semi-commercial property may have risen as these asset classes do not ...

## Consumer Attitudes towards Debt - UK

“Lending has grown rapidly in recent years, driven by rising consumer confidence and the cheap availability of credit. However, consumer confidence has taken a knock following the UK’s decision to leave the EU, which will result in a more cautious approach towards personal finances. In the short term while the ...

## Consumers and Taxes - US

“Most people need to pay taxes. However, while many taxpayers don’t mind paying taxes if they believe the money is used constructively, most would also like to pay the least amount possible. Offering to work with consumers to manage their income tax efficiently would give financial institutions and tax professionals ...

## Current Accounts - UK

“CASS switching levels reached a peak high in March 2016, indicating that competition in the current account market has improved. The growth in the proportion of new reward account openings in recent years shows that people now want more from a current account. The appetite for this type of account ...

## Digestive Health - US

“After experiencing solid sales in 2014-15, growth in the digestive health market is expected to soften somewhat in 2016. The majority of consumers are turning to some form of OTC (over-the-counter) digestive remedy for treatment, with antacids accounting for the largest share of all digestive health remedy sales. Looking forward ...

## Eating Out Review - UK

“Despite many people viewing email as a somewhat outdated means of communication, it is not only the most common means of online communication but also the most likely to be used multiple times per day. It cannot be disputed, though, that other channels such as instant messaging can provide more ...

## Eating Out: The Decision Making Process - UK

“More than half of diners would buy high quality food and the demand for standout dishes that diners can’t/ don’t make at home shows there is scope to use fresh ingredients in innovative cooking methods as a strong selling point.”

– **Trish Caddy, Foodservice Analyst**

## European Retail Briefing - Europe

**This month ERB includes:**

## Family Car Buying - US

“The family car market in the US is an increasingly diverse and crowded segment with a wide variety of offerings to match an even wider variety of family car buyers. Families range from single-parent single-child homes to multigenerational households with multiple children. This Report will dive into the profiles of ...

## Fruit - US

“Fruit sales in the US have surpassed the \$48 billion mark, growing consistently for the past decade, aside from a slight slowdown in 2014-15 due to an increase in fresh fruit prices. Fruit’s overall healthy reputation and the consumer desire for fresher foods should propel fruit sales even higher through ...

## Furniture Retailing - US

“Nearly three quarters of purchases are conducted in the store where shoppers can personally experience products. However, growth is coming from online

“Freshly prepared and handmade emerge as the two main attributes seen to indicate dish quality making these key messages for operators to convey to their customers to encourage repeat custom.”

## Ethical and Green Credentials in Travel - International

“The attainment of green and ethical credentials in tourism has evolved, from what was once largely an expression of ethical choice – with the added bonus of an extra marketing fillip – to what is for many now virtually an operational and market necessity.”

- **Jessica Kelly, Senior Tourism Analyst**

## Families - UK

“Over half of all parents believe that families today are not as close as they used to be, reflecting how the pressures of modern life are preventing them from enjoying important quality time with their children. This suggests that campaigns highlighting how products and services can bring families back together ...

## Footwear Retailing - UK

“Personalisation has become a big trend in the footwear sector, with consumers increasingly interested in being able to customise their shoes. Giving customers the option to create their own bespoke product provides an opportunity for retailers to drive sales of full-priced items.”

## Furniture Retailing - UK

“There are many retail multiples, including Oak Furniture Land, DFS and ScS, which are growing sales of furniture, helped by a combination of new store openings and online developments. And many that began as online pureplays are discovering the value of opening shops as well. The lessons of the recent ...

## Grilling and Barbecuing - US

“Grill ownership is strong and positive sales are expected through 2021. Gas format grills are most popular in full-size units, whereas portable units are most popular in charcoal format. Consumer sentiment

despite many consumers remaining reluctant to buy furniture using this method."

## Health and Fitness Clubs - UK

"Flexibility and technology are two important emerging forces in the private health and fitness club market, the former filtering up from a rapidly-expanding low-cost sector that is bringing new users into the market and the latter filtering down from a premium segment focused on improving experiences and the sophistication of ...

## Hispanics and Beauty Products - US

Hispanic women over index for use of most beauty product categories. However, brands face challenges growing their share; Hispanic women tend to be young, value oriented, and their willingness to experiment and try new products makes achieving brand loyalty difficult. As brands aim to connect with Hispanic women and become ...

## Ice Cream and Frozen Novelties - US

"As volume sales in the saturated category decline, dollar gains have cooled. While health leads reasons for cutting back, sales of traditionally health-focused products (including low- fat/calories) struggle, and indulgence appears as a strong purchase driver. Category players can aim at health through cues such as natural, premium, and ...

## Marketing to Baby Boomers - US

Baby Boomers are aged 52-70 and are making the transition from parents to grandparents and from full-time employment to full-time retirement. Although Baby Boomers have entered the second half of their lives, they don't necessarily feel "old" and want to continue to have exciting, active, and fulfilling lives.

## Medicated Skincare - US

"The rate of growth for medicated skincare market continues to decelerate. Anti-itch treatments remain the strongest performing segment, while foot medications, cold sore treatments, and skin growth removers

toward grills differs by generation, in which younger adults enjoy grilling to socialize while older adults grill to cook ...

## Healthy Lifestyles - Canada

"The emotional benefits of feeling good and being happier are keeping consumers motivated and engaged. Canadians remain steadfast in cooking and less willing to compromise health for convenience."

## Household Paper Products - China

"The two main reasons hindering consumers from using niche paper products such as moist toilet paper and kitchen wipes are low relevance and substitutable alternatives, indicating that companies need to prioritise market education if they plan to grow in these subdivided markets."

## Lifestyles of Children and Teens - UK

"As watching TV and using technology remains the top activity both after school and on weekends, today's kids and teens are far more exposed to advertising than previous generations ever were. Building cradle-to-grave loyalty has become easier, but brands need to tread carefully; in the age of social media any ...

## Marketing to Sports Fans - US

"Professional football leads the pack as the most popular American sport, followed by baseball and basketball. Avid Fans often follow all three (or more) traditional sports and keep up with their favorite teams by watching sports news, reading articles online, and even scanning the local paper. Whichever channel fans choose ...

## On-trade Alcoholic Drinks - China

"Now is a transformative phrase for the alcoholic drinks market. Growth rate will be low but stable over the next five years to 2021. With the rise of an experiential consumption culture and stronger influence from

continue to stagnate. Alternative treatment methods – from self-healing to home remedies and prescription care to general skincare –further exasperate the already ...

## Online Retailing - Europe

“Online is growing everywhere, although Northern Europe leads Southern Europe. All the Mintel consumer research points to its continued popularity and even in the most developed countries we expect considerable further progress over the next few years. The limiting factors are broadband access, the number of retailers with an online ...

## Online Retailing - Germany

“E-commerce is highly developed in Germany with almost 11% of all retail sales coming online. But it has developed unevenly with online sales accounting for just 0.3% of grocery retailer’s sales. The entry into the online food space of Amazon in June 2016 could prove to be the catalyst ...

## Online Retailing - Spain

“Spain lags behind Northern Europe in online development, but it is catching up. Younger people are leading the way, both in usage and in innovation, but older people are following. Compared with Germany, online is still in its infancy, but there is growing willingness to buy online and a growing ...

## Online to Offline Retailing - China

“The online retail market is slowing, becoming more competitive and has to become more integrated with offline retailing. Retailing has to include a combination of both, requiring redefining what the role of physical stores should be and using more mobile technology. Rising competition is already driving mergers and cross-investment deals ...

## Patio and Outdoor Living - US

“The patio and outdoor living market continues to steadily gain momentum parallel to the improving economy and housing market. While the majority of Americans have some form of outdoor space, living situation and household income determine what

Western lifestyle and purchasing value, Chinese consumers are eager to seek out innovations in ...

## Online Retailing - France

“E-commerce is dynamic but maturing, and it now accounts for almost 5% of all retail sales. Amazon is the largest player and is extending its lead, although it has a formidable rival in the shape of local operator, Cdiscount. We have seen a number of acquisitions recently, with smaller, weaker ...

## Online Retailing - Italy

“Online remains a minor channel for retailing in Italy, accounting for just 0.7% of total retail sales in the country we estimate. Domestic retailers were slow to enter the online retail channel and even Amazon did not arrive in the market until 2010. Our consumer research suggests that Amazon ...

## Online Retailing - UK

“We tend to lose sight of the fact that online retailing is still very young. Ten years ago it took less than 3% of all retail sales. Everyone involved has been on a very sharp learning curve and the rise in online sales seems inexorable. But it isn’t. We think ...

## Packaged Bread - US

“While packaged bread remains a huge category with virtually universal penetration, dollar sales have increased only minimally in recent years, and actual consumption has declined due to concern over calories and carbohydrates. Still, opportunities exist to improve bread’s health profile, to expand its use across more occasions, and to highlight ...

## Payment Methods: Online vs Offline - Ireland

“Compared to less than a decade ago when cash was the preferred method of payment among Irish consumers, the Irish payments industry has changed dramatically. Non-cash methods of payment have become increasingly popular - most notably debit cards, which

purchases and enhancements can be made. Further growth in the category hinges on ...

## Price Comparison Sites in General Insurance - UK

“The price comparison website industry is in a very healthy position in terms of current use and future opportunities. Future development should continue to focus on increasing the level of convenience provided by sites. Having access to wide-ranging market information has strengthened the consumers’ hand when looking for insurance products ...

## Retailer Loyalty Programs - US

“Consumers have more loyalty accounts than ever before, which means they’re also starting to feel pressure from an overabundance of choice. Retailers are therefore challenged to streamline the shopping and loyalty experience without completely disrupting the core experiences that they’ve built their brands on.”

## Sports and Energy Drinks - China

“Thanks to increasingly health-conscious consumers and their fast-paced lifestyles, China’s sports and energy drink market has experienced explosive growth and will continue to expand quickly. The Chinese sports and energy drinks market is dominated by leading international players, posing both threats and opportunities for smaller and domestic brands. With consumers ...

## Tea and Other Hot Drinks - UK

“UK retail value sales of tea have been in decline, with growth in sales of green, fruit/herbal and speciality teas not enough to make up for a fall in sales of standard black tea that dominates the market. Tea brands need to increase the appeal of their products to ...

## Teens' and Tweens' Technology Usage - UK

“The rapid success of Snapchat with teens/tweens highlights that for young people it is the ability to create

have now far surpassed credit cards as consumers' favourite form of plastic ...

## Restaurant Breakfast and Brunch Trends - US

Breakfast and brunch has gained attention from both chefs and consumers, as a number of chains have revamped or expanded their morning menus. While consumers tend to eat breakfast at home, many diners report buying breakfast at restaurants more often compared to just a year ago. Though there is a ...

## Short and City Breaks - UK

“There was strong growth in the short breaks market in 2015 and the first half of 2016, especially in the overseas segment. However, following the Brexit result, further rapid growth is in doubt. Despite uncertainty, there is still an opportunity to promote domestic trips, as well as promoting cheaper European ...

## Sports Goods Retailing - UK

“The sports goods market continues to grow at an exceptional level. Driven by a rising interest in health and wellness amongst young consumers, the athleisure trend is dominating the sector. The success of the market has seen increasing levels of competition from non-specialists and more than ever retailers need to ...

## Technology and Irish Tourism - Ireland

“The popularity of customer review websites highlights the emphasis consumers are placing on peer feedback and recommendations. Usage of customer review websites is highest among affluent consumers and highlights how platforms such as TripAdvisor can be an important tool for reaching higher-spending consumers that are looking at the luxury end ...

## The Brazilian Economy - Changes in Saving and Spending Habits - Brazil

and communicate in innovative, fun new ways that is at the heart of their interest in social media. New social media features, from livestreaming to creating short music videos, are being ...

## UK Retail Briefing - UK

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

## Yogurt and Yogurt Drinks - UK

"In a price-driven market, yogurt companies will need to find a compelling alternative reason for shoppers to choose their products, as competitively lowering prices eventually becomes unsustainable. With many people amenable towards paying more for a guarantee on farmers' pay or animal welfare, making their credentials in these areas tangible ...

## 家用纸制品 - China

"阻碍消费者使用湿厕纸和厨房湿巾等小众纸制品的两大原因是相关性低、有替代选择，这意味着，如果公司有意开发这些细分市场，就需要优先市场教育。"

— 李宇静，高级研究分析师

## 早餐 - China

"中国消费者对早餐食品的需求呈层级分布。除了饱腹感和营养等基本需求以外，消费者也愿意为能够节省时间的便捷型产品和服务支付溢价。与此同时，他们也青睐具有提神功效的早餐食品。除了食品本身外，餐厅餐饮环境也日益重要。舒适、有趣的就餐环境不仅能为食品收取溢价，同时也能够吸引那些希望在周末享受不同早餐体验的消费者。"

## 零售：从线上到线下 - China

"在线零售市场增速逐渐放缓，竞争日益激烈，线上市场日益整合线下零售市场以期共同发展。零售市场的全新概念融合线上和线下，并要求市场重新定义实体店所扮演

"The recession, with higher inflation and interest rates, more difficult access to credit, and rising unemployment has made consumers change their spending and saving habits. While consumers look for deals, plan their purchases, and cut back on nonessential items, they are also being more careful when it comes to getting ...

## What's for Breakfast - US

"Consumers are eating a variety of breakfast foods, at home and away, with their preference for healthy or indulgent foods differing by the day of the week. One constant however, is their need for quick, portable, and healthy breakfast foods that keep them full and energized. Consumers are open to ...

## 信贷产品 - China

"信贷产品的设计和运作更多地受到监管部门，而不是信贷机构本身的影响。在中国，受益于普惠金融政策，网络借贷平台、互联网银行和股权众筹平台等互联网金融企业蒸蒸日上。消费者亦享受着因这些平台机构与传统银行竞争而带来的便利。错败不应被忽略，但也不应被放大。随着更多相应的条例出台，住户贷款市场预计将继续增长，涌现更多负责任的企业和创新性产品。"

— 过人，高级研究分析师，中国

## 彩妆 - China

"彩妆依然是一个成长中的品类，大多数用户还没有固定的使用习惯。每日都会化妆的女性数量较2015年有所下降，而且她们还倾向转换使用不同品牌。"

## 运动和能量饮料 - China

"得益于中国消费者对健康的日益重视和生活节奏的加快，中国运动和能量饮料市场经历了爆炸式增长，而且这种快速增长势头预计将继续保持。当前，中国运动和能量饮料市场主要由国际领先企业所主导，这一市场格局使国内品牌和小品牌面临着威胁与机会并存的局面。"

## 餐饮娱乐渠道饮酒趋势 - China

"目前酒精饮料市场正处于转型阶段。在2021年之前的未来五年中，增长率将保持低位但趋于稳定。随着体验消费文化的日益流行，以及西方生活方式和购物价值的影响力





的角色，并同时融入更多的科技色彩。随着零售商开始寻求线上到线下的协同效应，白热化的竞争带来多元化商业合并和跨品类投资的产生。这也促使品牌投其所好推出更优质的产品和高附加值服务。”

日趋增强，中国消费者渴望在产品和餐饮娱乐体验中寻求创新。”

— 马子淳，高级研究分析师