

**May 2016**

## **Attitudes towards Cooking in the Home - UK**

“While the recession has been a driving factor for the scratch cooking trend, enjoyment and ingredient control are as important as saving money in prompting people to cook. This should go some way to maintain interest in scratch cooking even as incomes rise. Marketing messages centred on enjoyment provide a ...

## **Black Consumers and Money Management - US**

"Black consumers are eager for help and in need of money management services. Black consumers' household structures, dynamics, and incomes differ from the total population, presenting them with specific challenges in managing their money."

## **Brazil Outbound - Brazil**

“Brazil’s booming economy and rapidly expanding middle class has enabled millions of consumers to take foreign trips abroad for the first time. In 2003, just 3.2 million Brazilians travelled abroad, but a decade later in 2013 this figure had leapt to nearly 9 million, according to the UNWTO.”

## **Car Insurance - Ireland**

“Having benefited from several years of intense price competition among car insurance providers, consumers both in NI and RoI are being confronted now with a harsh new reality: significant increases in motor insurance premiums over the past couple of years, with further (albeit less severe) increases almost inevitable in the ...

## **Cheese - Ireland**

“Cheese remains an Irish household staple with seven in 10 Irish consumers purchasing cheddar in the last three months. Although the Irish cheese market is set for growth in 2016, this market still faces losing health-conscious consumers due to its perceived high levels of fat, calories and salt. However, the ...

## **Consumer Attitudes Toward FinTech - US**

## **Attitudes towards Leisure Venue Catering - UK**

“Secondary spending at leisure venues remains in the line of fire, with most diners willing to cut back on their food and drink spend if ticket prices rise. The pressure therefore remains on operators to justify the catering spend. Initiatives like themed events and menus and produce from local suppliers ...

## **Books and e-books - UK**

“Reports of the death of print, as Mark Twain might have said, have been greatly exaggerated. For those who predicted an inexorable decline of physical books, the past 18 months have necessitated a re-think. Far more than in other media sectors, book buyers and readers maintain an emotional connection with ...

## **Car Finance - UK**

“Car finance has benefitted from a dramatic expansion in its popularity in recent years. Fuelled by innovations such as PCP (Personal Contract Purchase) as well as the development of retail leasing products, both the volume and value of car finance contracts sold have seen unprecedented expansion. With car market volumes ...

## **Carbonated Soft Drinks - Brazil**

“There are two main factors affecting the consumption of carbonated soft drinks: the first one is the economic recession; the other is that Brazilian consumers are opting for products they consider to be more healthful. Retaining these consumers is essential, that’s why companies have invested in healthful carbonated soft drinks ...

## **Color Cosmetics - Brazil**

"The color cosmetics category is unique when it comes to shopping experience: at the same time that consumers seek a sensorial experimentation of the products, they have increasingly moved towards mobile apps and virtual platforms in order to learn new makeup techniques and how to use a wide range of ...

## **Consumers and Financial Advice - Canada**

FinTech start-ups are fundamentally altering how consumers interact with financial services by delivering these services faster and by factoring in an ever-growing volume and variety of data for assessing the value of potential customers. Traditional finance brands are also leveraging the innovations that have emerged from the FinTech scene. Mobile ...

## Consumers and Financial Advice - UK

“Advisers are being challenged by customers, competitors and the regulator, with the ultimate result likely to be a more equitable market. This means there are opportunities for those willing to explore beyond the typical financial advice customer. Robo-advice has great potential across different financial products and customer segments but people ...

## Courier and Express Delivery - UK

“The increasing popularity of online shopping in both the B2B and B2C sectors is driving demand for parcel operators. Competition is increasing parcel volumes at a faster rate than revenue, and courier and express service operators will need to raise capacity to service demand, and innovate to increase turnover from ...

## Data Centres - UK

“Exponential growth in data, set to further increase with the Internet of Things; continued migration to the Cloud; advances in communication speeds; ever advancing technology in computing power; and the trend to third-party outsourcing of non-core activities can only result in growing data centre demand.”

## Dishwashing Products - US

“Practically every US home has dishwashing products. However, being such a universal product category means it can be difficult to drive growth. While dishwashing liquid has been able to increase sales in recent years through innovations such as scented formulas, dishwasher detergent has found it harder to differentiate and faces ...

## DIY Retailing - France

“The introduction of CRM2 and the rise of digital advice channels (including robo-advisory services) are two major forces that are likely to have a significant impact on the financial advisory industry in Canada in the coming years.”

– **Sanjay Sharma, Senior Financial Services Analyst**

## Consumers and the Economic Outlook: Quarterly Update - UK

“Mintel’s consumer confidence data shows that the economy only has, at best, an indirect impact on sentiment. When the UK economy was outperforming most of its peers, many people were still pretty wary. However, in 2016 sentiment has continued to trend upwards, despite disappointing growth in the economy as a ...

## Customer Satisfaction and Brands - UK

“There is a clear link between customer satisfaction and perception of premium attributes such as quality, innovation, sophistication or style, forming the basis of why consumers seek out luxury brands in the first place. Luxury brands can highlight this satisfaction and the emotive benefits that they bring in order to ...

## Dining Out - Canada

Canadians are dedicated patrons of foodservice outlets with some 94% who have eaten at a restaurant in the three months leading up to February 2016. However, tightening of budgets means that more consumers are spending in moderation and cutting back on treats – including dining out. As such, the industry ...

## DIY Retailing - Europe

“DIY faces challenging times. The superstores are under pressure in both Germany and the UK and if Bunnings is successful with Homebase that pressure can only increase for the rest. The combination of an ageing population and a clear shift towards renting in some countries are the main reasons for ...

## DIY Retailing - Germany

"The outlook for the DIY market in France is tough. There are few opportunities for organic growth and competition is growing from online and other channels. Despite the failed attempts by Kingfisher and Bricorama to acquire Mr Bricolage, we expect to see consolidation of some kind in the near future ...

## DIY Retailing - Italy

"The slowdown in price growth across the category helped encourage consumer expenditure on DIY in 2015, with the softer end of the market outperforming the heavy end, which helped soft end-focused Leroy Merlin consolidate its market leading position. Elsewhere, sector specialists retail sales struggled as more consumers shopped at non-specialists ...

## DIY Retailing - UK

"The UK DIY market remains challenging with growth in consumer spending slowing and retail sales through the specialists going into decline. Quality and staff expertise are key points of difference for the specialists, but they need to find a way to bring this closer to the everyday lives of consumers ...

## Equity Release Schemes - UK

"The growth of the equity release market is almost guaranteed by a number of strong market drivers, such as population growth, house price rises and changes in retirement preparation. However, consumers remain suspicious of the industry and there is work to be done to ensure that those who need help ...

## Facial Skincare and Anti-Aging - US

"The highly competitive facial skincare and anti-aging category saw sales dip in 2015, as specialty skincare segments continue to struggle and the previously fast-growing lip balm segment also saw sales decline. However, cleansers and moisturizers show positive growth, and natural products, Asian skincare inspired products, and no-rinse cleansing products are ...

## Financial Literacy - US

The level of financial literacy is low in the US and consumers are paying the price. The ramifications of

"DIY superstores are under pressure. The collapse of Praktiker has given them some respite but the underlying trend appears to be downwards. There has been a small, but significant upward move in the proportion of people renting their homes and there is an ageing population, less inclined to do home ...

## DIY Retailing - Spain

"There is a long way to go but the DIY market in Spain is showing signs of recovery, with both consumer spending on DIY products and DIY specialists' sales growing strongly in 2015. The fact that the DIY specialists' sector grew ahead of consumer spending on DIY suggests that the ...

## Energy Drinks - US

"Total retail sales of energy drinks and shots posted estimated gains in 2015, thanks to the success seen in the energy drink segment. Total category sales are expected to continue upward as consumers search for functional drinks that meet their energy needs."

- Elizabeth Sisel, Beverage Analyst

## European Retail Briefing - Europe

This month ERB includes:

## Family Finances - UK

"Balancing day-to-day expenses like food, bills and childcare makes it difficult for families to save and plan for the long term. Changing family dynamics are also putting added pressure on family finances. More 'adult children' are choosing to remain in the family household, and as such, their need for additional ...

## Gastrointestinal Remedies - UK

"Sales of gastrointestinal remedies have surged in recent years as consumers have become increasingly aware of

this to consumers are obvious, and fortunately many consumers realize that they don't know enough and are interested in learning more. To help consumers improve their understanding of concepts such as ...

## Hispanics and Money Management - US

"The majority of Hispanic consumers tend to be optimistic about how they are doing financially, as their households are able to save money each month. However, Hispanics tend to lack clear financial goals and their distrust of institutions means they are not using them to their full potential."

## Ice Cream and Frozen Novelties - Canada

Canadians love ice cream. Some 90% of Canadians claim to eat single flavoured ice cream during the warmer months and with the exception of gelato, more than half of Canadians claim to eat ice cream at some point. Even with ice cream and frozen treats' relatively high penetration, the market ...

## Legal Services - UK

"The adoption of Alternative Business Structures (ABS) has not resulted in an immediate transformative change in the legal services industry. However, it has started to drive much needed innovation to the legal sector, with firms delivering more client focussed and cost effective services as competition starts to intensify. Some traditional ...

## Maquiagem e Esmalte para Unhas - Brazil

"A categoria de maquiagem e esmalte para unhas é única em se tratando de experiência de compra: ao mesmo tempo em que as consumidoras buscam a experimentação sensorial dos produtos, elas têm recorrido cada vez mais a aplicativos de celular e plataformas virtuais a fim de aprender técnicas e como ...

## Men's Facial Skincare - UK

their diet and digestive health. However, along with a growing awareness of health issues comes a greater desire to treat illness through dietary changes rather than reaching for medications, which is a challenge for ...

## Hotels in India - India

"The Indian hotel market is clearly not over-supplied. Quality branded rooms supply should grow from about 112,300 in 2014/15 to almost 146,500 by 2019/20 – an increase of some 30%. It would seem likely and indeed desirable from an economic standpoint for India's small domestic players ...

## IT Services - UK

"Computer technology has migrated away from its origins of providing new ways to undertake activities to increase capabilities, improve efficiency, and transform cost competitiveness. It is evolving towards identifying and analysing data to benefit the growth and marketing potential of organisations."

– Terry Leggett, Senior B2B Analyst

## Lifestyles of Mums - UK

"Whilst some blame devices for making today's kids lazy, there are many ways in which technology could encourage kids to do all the things that are not always considered to be fun, making parents' lives easier. Some of the best educational apps are free and could motivate kids to eat ...

## Marketing to Millennials - US

"Although this generational group spans nearly two decades, making it hard to understand what a "typical" Millennial looks like, hallmarks of this group include their support of social change, and changing family dynamics; their penchant for selective spending in which they will scrimp in some areas only to splurge on ...

## Mortgage Advice - UK

“Sales growth has slowed in the male facial skincare market, challenged by both recruitment issues and the impact of fashion trends. The core demographic of 16-24-year-olds is declining in number and older men remain apprehensive of using facial skincare products. Male facial hair is now a mainstream trend and is ...

## Motorcycles - US

"The market for new motorcycle sales is one of great challenge. The industry is also challenged by an aging core group of owners, with those over the age of 55 slowly giving up on motorcycling, and efforts to draw women into the market less effective than the industry might desire ...

## On-premise Alcohol Trends - US

"Sales of alcohol at bars, restaurants, and other establishments continue to grow as consumers feel relatively positive about the US economy. The alcohol industry is continually adapting to new consumer preferences including the movement toward craft beer, lower alcohol drinks, and cocktails made with the freshest ingredients. Bars/restaurants can ...

## Package vs Independent Holidays - UK

“Package providers must adapt to growing consumer demands for customisation and personalisation, especially on mobile devices. As new price comparison and aggregator apps continue to come on the market, consumers will become more comfortable doing independent research and booking on their mobile devices. As a result of the choice on ...

## Prepared Meals - US

"Sales of prepared meals turned slightly positive in 2015 after three consecutive years of declines, but remain below their 2010 level, weak results in line with a broader move away from more processed foods in favor of fresher and healthier alternatives. Still, the category's defining convenience benefit remains compelling, and ...

## Pub Catering - UK

“Independent advisers have an advantage over branch-based advisers in being perceived as responsive to customers' needs, but many people will still opt for a lender and product selected through their own research. Online advice carries the potential to address lingering accessibility issues among the high street names, with video appointments ...

## Nightclubs - UK

“The potential of smartphones within the nightclubs market, in terms of promotion, booking and in-club behaviour, is still underexplored. However, high interest in such features among young club goers suggests the smartphone is set to become a far greater element of nightclub visits in the coming years.”

## On-trade Soft Drinks - China

“Beverages usually are not the centre of a meal, but pairing the beverages with food can effectively increase consumers' likeliness of ordering a drink. Aside from herbal tea brands which have successfully paired themselves with hot pot cuisine, there is still great potential for other non-alcoholic drinks to pair with ...

## Prepared Cakes and Pies - US

"The market for prepared cakes and pies should continue growing for the foreseeable future. Consumer concerns relating to health and obesity, while certainly significant across the food and drink industry, appear somewhat less of a factor to this more indulgent category. However, consumer interest in options with reduced calories, fat ...

## Prepared Meals Review - UK

“Boosting the nutritional benefits of prepared meals can tap into the current high interest in “positive nutrition” foods while helping to overturn the typically unhealthy image of these products. Within this, vegetables, superfoods, whole grains and ancient grains can play an increasingly important role, as well as foodie health trend ...

## Pub Visiting - UK

“The pub catering market is highly competitive, as evidenced by the continuing decline in pub numbers. Pubs also compete with a range of other eating out establishments, so food needs to compare favourably with restaurants if they are to increase the frequency of visits. Food is a core part of ...

## Quick Service Restaurants - US

“As the lines between traditional restaurant segments continue to blur, QSRs (quick service restaurants) have been taking steps to remain competitive in the changing restaurant landscape. Most QSR users agree that QSRs are the best option when they are short on time. QSRs must make it a priority to maintain ...

## Self Diagnostics - US

“The self diagnostics market is made up of several diverse segments all aiming to give consumers insight into their health. For the two largest segments, blood pressure and blood glucose monitoring, testing is likely to be done out of necessity and can be covered by insurance, which impacts retail sales ...

## Social and Media Networks - China

“China’s consumers are actively using social and media networks. To accurately reach target consumers, online interest communities can be effective market communication channels. Public accounts of opinion leaders may help brands to boost awareness, and offering promotions via public accounts may boost consumer engagement.”

– Terra Xu, Senior Research ...

## Social Networking - Ireland

“Social media is seen as a good source of company information among consumers. This indicates that platforms such as Facebook, YouTube and Twitter are becoming increasingly important to Irish consumers during the research phase of many types of purchase decision. Updating their presence on social networking sites regularly will ensure ...

## Teen Fashion - US

“Many publicans have evolved their venues and placed a greater emphasis on food in order to remain profitable. That ‘high-quality food’ is the factor which is most likely to entice people to try a new pub underlines how an appealing menu can help to pubs to broaden their customer base ...

## Refrigerantes - Brazil

“Existem dois fatores principais impactando o consumo de refrigerantes: o primeiro é a recessão econômica; o outro é a migração para opções que os brasileiros percebem como mais saudáveis. A retenção destes consumidores é primordial e, para tanto, as empresas vêm investindo em bebidas gaseificadas mais saudáveis, com chás e ...

## Snack, Nutrition and Performance Bars - US

“Dollar sales of snack, nutrition, and performance bars grew in 2015, continuing the steady, though lackluster, pace seen over the past few years. Products in the category hit the mark in appealing to both the health and snack interests of consumers – viewed as a convenient contribution to healthy lifestyles ...

## Social and Media Networks - UK

“While the reach of branded communication still seems relatively limited, brands should not underestimate the potential of second-degree exposure through shares of content originally posted by brands and online reactions to offline ads, which can significantly broaden the audience that is exposed to a brand’s message.”

– Sara Ballaben ...

## Teen and Tween Beauty and Personal Care Consumer - US

Teens represent an increasingly diverse and open-minded population, and as a result are seeking more relatable spokespeople in BPC (beauty and personal care) advertising and communication. Teens are also tech-savvy and engage with BPC products and trends online while ultimately making purchases in-store, stressing the need for a seamless omnichannel ...

## The Connected Home - UK

"Many teen retailers have struggled (or failed) to keep up with today's teens' dynamic fashion preferences and digital prowess. Teens, however, are still invested in fashion despite competition for their money from other categories, namely electronics, and particularly tech devices. Retailers interested in garnering a share of the teen fashion ...

## Travel and Tourism - Kenya

This report looks at the following areas:

## Travel and Tourism - Mozambique

This report looks at the following areas:

## Travel and Tourism - Rwanda

This report looks at the following areas:

## Travel Booking - US

"The US travel market is stable and growing. As spending on leisure travel increases, so too will the market for travel booking. Booking direct with suppliers continues to be the norm, though OTAs (online travel agencies) are aggressively competing for share. As loyalty to travel supplier brands is in question ...

## Vegetables - US

"The vegetables category continued its steady year-over-year growth fueled mostly by sales of fresh produce, including fresh-cut salad. Consumers are eating and buying more vegetables, at home and away, and are looking for freshness, convenience, and nutrition. Despite category interest, consumers still want more information about product nutrition, preparation, and ...

## Winter Holidays Abroad - UK

"Geopolitical instability and terrorism has transformed the winter holiday landscape, with western Mediterranean resorts once seen as safe and unadventurous coming back into fashion, a situation that is unlikely to change in the short to medium term. Additionally, consumers' increasing desire for authentic experiences has resulted in growing numbers of ...

"The smartphone is consumers' preferred control mechanism for the connected home. However, current platform fragmentation means that consumers may need several different apps to control all of their connected home devices. Android and iOS continue to dominate the smartphone OS market in the UK, holding a combined 85% share of ...

## Travel and Tourism - Malawi

This report looks at the following areas:

## Travel and Tourism - Namibia

This report looks at the following areas:

## Travel and Tourism - Tanzania, United Republic of

This report looks at the following areas:

## UK Retail Briefing - UK

## Washers and Dryers - UK

"Washing machines are a household essential and will be replaced as a matter of urgency when they go wrong, but the buoyant housing market and growth in household numbers have stimulated the first-time buyer market too. Manufacturers have forged ahead with innovative products in the market for laundry appliances. The ...

## Women's Facial Skincare - UK

"The women's facial skincare category has seen slow and steady growth in recent years, with the prestige sector driving growth in 2015; as employment rates rise, women are showing a greater willingness to spend on premium products. Whilst brands are promoting ageless beauty campaigns in 2015, focusing on NPD for ...



## Womenswear - UK

“Growth in the market has slowed as women have become accustomed to purchasing clothing on sale. The market remains resilient, yet retailers should be looking beyond promotions to drive sales. Combining retail with leisure enables retailers to tap into this growing area of spend, while digital innovations can balance a ...

## 餐饮娱乐渠道软饮料饮用趋势 - China

“饮料通常不是一餐当中的主角，但搭配食物一起售卖可以有效提升消费者点购饮料的可能性。配餐概念在酒类和西餐文化中已得到充分的开发, 但在中国文化中除了凉茶已成功与火锅搭配外，将其它非酒精饮料与各式中国地方特色菜一起搭配饮用的空间也非常广阔。”

— 杨晴，研究分析师

## 社交和媒体网络 - China

“中国消费者活跃于社交和媒体网络。为了准确定位目标群体，网上兴趣小组可以作为市场营销的有效渠道。利用意见领袖公众号能够帮助品牌增加曝光度；公众号推广促销优惠活动可以有效提高消费者的参与度。”