

June 2014

## All-Inclusive Holidays - Europe

Analysts broadly concur that all-inclusive holidays hark back to the British holiday camps established in the 1930s. Today, all-inclusive holidays are a global phenomenon, with Club Med widely credited as the pioneer of these in the 1950s. Definitions and products are varied, however, a typical all-inclusive holiday comprises air travel ...

## Analgesics - US

“While sales of analgesics are increasing, the market is still up against a few challenges. A high degree of brand loyalty makes it difficult to get consumers to try new brands. Alternatively, opportunities for innovation present new usage occasions to grow market sales.”

– Emily Krol, Health and Wellness ...

## Beer - Ireland

“The Irish beer market continues to struggle in 2014, with volume and value sales in the on-trade continuing to decline, as consumers drink at home more. The market has however experienced a strong level of innovation in terms of flavour, packaging and new product launches by craft brewers, helping to ...

## Body, Hand and Footcare - UK

“Despite older people being the most likely to agree that moisturising the body is important, actual usage of body care products is low amongst the over-55s. The low usage of anti-ageing products amongst this group suggests that ageing skin has other needs which are currently under-represented in new product development ...

## Cakes and Cake Bars - UK

“Cake companies can look to completely new formats in their NPD (New Product Development), given the interest in these from one in four users. For example, companies could create their own versions of the hybrid sweet treats (eg cronut, duffin) which have garnered a lot of media attention in the ...

## Analgesics - UK

“The analgesics market benefitted from the strong marketing and product innovation output in 2013, as well as a strong performance by the topical analgesics segment. However, a battle still remains as consumers increasingly seek cheaper own-label products over those produced by well-known brands, due to the value they offer.”

## Bebidas Esportivas e Energéticas - Brazil

“O alcance relativamente baixo das bebidas energéticas e esportivas pode estar sendo influenciado pela comunicação restrita dos seus benefícios, segmentando muito os públicos que as consomem, e as ocasiões em que essas bebidas podem ser consumidas. É importante ressaltar para os brasileiros que os energéticos não são somente para jovens ...

## Black Consumers and the Car Purchasing Process - US

“Encouraging Black consumers to visit a car dealership is the step that can advance the car-buying process toward purchase. Marketers need to form their message to give Black consumers a clear call to action to experience new vehicles in-person. General incentives may work, but specific messaging will also be effective ...

## Body, Hand and Footcare - US

“In spite of being a mature market, the body, hand, and footcare market holds opportunities for brands that emphasize therapeutic skincare and packaging innovation that reinforces ease of use and convenience. Targeting relatively untapped demographic groups such as men, older shoppers, and multicultural consumers also presents brands and retailers with ...

## Car Retailing - Brazil

“Cars are an integral part of the Brazilian lifestyle. They represent a major asset for people who already own one and the epitome of the consumerist dream for most who do not. Yet price remains a very strong barrier to vehicle ownership, and the majority of Brazilians can only afford ...

## Carbonated Soft Drinks - UK

“Carbonated soft drinks are consumed with meals by three in eight users but tailoring flavours more closely to meals may boost consumption further. Half of users believe that CSDs with less sweet flavours would complement a meal better.”

## Casino and Casino-style Gambling - US

“The casino market is unique in that most consumers have visited a casino in the past, even though four in 10 expect to lose when they gamble. The excitement of the environment, the possibility of winning, and the ancillary offerings create an alluring alternative to most leisure and entertainment offerings ...

## Cleaning the House - US

“Housecleaners may be looking to simplify their approach to housecleaning, but a clean and healthy home is still an important goal. Brands can uncover new opportunities for growth by helping housecleaners clean effectively in every room of the house and encouraging more family members to get involved.”

– John ...

## Craft Beer - US

“The leading purchase driver among craft beer drinkers is style, pointing to a more discerning consumer base. This focus on style and flavor is a major element that differentiates a craft beer drinker from the rest, and points to the future of beer in the US. Whereas consumers used to ...

## Cruises - International

“Companies are using Big Data to source demographic and buying pattern information on passengers and then using it to dictate how they market their products to them.”

## Digital Trends Summer - UK

## Carbonated Soft Drinks - US

“The carbonated soft drink market is continuing to decline as consumers are driven away by artificial sweeteners, high sugar content, and other ingredient concerns. The CSD category is an easy target as other beverages innovate and entice consumers away from sodas.”

## Cleaning the House - UK

“Focusing on not just highlighting the attributes of cleaning products but also showing families doing the cleaning together could help to inject more life into an advertising campaign and at the same time increase engagement with a cleaning brand.”

## Consumo de Bebidas Fora de Casa - Tendências - Brazil

"Apesar da redução do consumo de bebidas alcoólicas fora de casa observada no Brasil nos últimos anos, marcas de bebidas, principalmente de destilados, abrem cada vez mais bares próprios no país. Essa é uma estratégia interessante para incentivar o aumento do consumo e promover lançamentos recentes. A cerveja, bebida alcoólica ...

## Critical Illness Cover - UK

“Insurers rely on advisers and the business they bring in, but should be more open minded to the possibility of growth in non-advised sales. By making policies simpler and online services easier to use, providers could tap into a group of consumers with day-to-day need for protection but no need ...

## Digital Trends - China

“PCs and mobile phones are leading consumer technology product segments with high product ownership. Both segments are mature in terms of penetration, and volume growth for these categories is mainly driven by replacement and upgrades.”

– Can Huang, Senior Research Analyst

## Drinking in the Home - UK

“Tablets are now in half of homes in the UK, despite arriving on the market in their current form just four years ago. Yet people are still just as likely to be in the market for a new laptop, as many remain reluctant to perform complex and work-oriented tasks on ...

## Eating Out Review - UK

“Experience-driven facets are needed to help operators differentiate dining out from the rather lacklustre experience that many diners experienced during the recession when all eyes were on the price, and help reinvigorate consumer enthusiasm for spending on the category.”

## 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.

## Facilities Management (Industrial Report) - UK

“The industry is anticipating a bright year in 2014, with the economic recovery looking increasingly secure. The outlook for construction is positive and major infrastructure projects are expected to offer new soft and hard service opportunities.”

## Health and Fitness Clubs - UK

“Operators are going to have to start looking at ‘infilling’ with smaller clubs in the same way that the major supermarket chains have switched to building smaller convenience stores serving local neighbourhoods.”

— **Michael Oliver, Senior Leisure and Media Analyst**

## Hispanic Consumers and Social Media - US

“Encouraging consumers to trade up to better quality is possible given that 62% of drinkers think that it is worth paying more for better quality. The key to this is conveying tangible reasons for the higher price, for example the use of high-quality ingredients or limited batches.”

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

“The country’s ageing infrastructure assets continue to drive capital investment in the electricity distribution industry. Distribution network operators are also ramping up investment in new technologies to accommodate higher quantities of distributed generation and low carbon technologies on the grid.”

## Facial Skincare - Brazil

“The penetration of facial skincare products in Brazil is still low – only seven in 10 Brazilians use the category. Consumers are sensitive to price, which can be an obstacle for consumption. There are opportunities for companies to use opinion formers to educate consumers about the benefits of facial skincare ...

## Food to Go - Opportunities for the Lunchtime Trade - Ireland

“Despite disposable incomes increasing in NI and RoI, consumers largely remain driven by low price when purchasing lunch outside of the home, meaning that meal deals and price promotions will continue to remain important to attract footfall. Opportunities exist for food-to-go brands and operators to engage in menu and flavour ...

## Health Insurance - US

“Now that the first open enrollment period for the ACA has ended, it is clear that it has been successful in reducing the ranks of the uninsured, including – and perhaps surprisingly – among young people. People are still searching for information, however, so continued communication from both the government ...

## Holiday Car Hire - UK

“The latest advances in technology and the fact that Hispanics are quickly closing the gap in online access are creating an environment that is quite fertile for promoting biculturalism. Social media or networking sites give Hispanics the ability to remain in touch with their country of origin and connected to ...

## Ice Cream and Desserts - UK

“Flavour trends have been widely explored by operators in the ice cream and desserts market, looking to cater to adventurous palates and continuously refresh their offering. Coffee, dessert and alcohol-inspired flavours have been seen across the ice cream and desserts market, appealing to adult tastes.”

## Limited Service Restaurant (LSR) Specialty Shops - Snacks, Beverages & Desserts - US

“Limited service specialty restaurants are often singular-item focused. They must figure out how to create buzz and position their item in a variety of ways to appeal to a wide range of consumers. Certain brands have found success in creating line extensions with seasonal and limited-time offers, new formats like ...

## Marketing para a Classe Média - Brazil

“Os consumidores da classe média continuam no alvo das principais empresas em atuação no país, que disputam entre si as chances de ampliarem significativamente o volume de vendas. Todavia, a classe média brasileira é diversificada, com subgrupos de consumidores que apresentam situações financeiras diferentes e projetam desejos e expectativas por ...

## Marketing to the Middle Classes - Brazil

“Middle-class consumers are still the target of leading companies operating in Brazil, who are competing among each other for the chance to significantly increase their sales volume. However, Brazilian middle-class is diverse; subgroups within this socioeconomic group are in different financial situations, with their desires and expectations varying according to ...

“The evolution of the ‘peer-to-peer’ economy is having a seismic impact on travel, from the influence of online customer review to the exponential growth of Airbnb and the challenge it now poses to the hotel industry. In future we may see this trend spread to holiday car hire, with local ...

## Innovation on the Menu: Flavor Trends - US

“Restaurant operators don’t necessarily need to reinvent the wheel if they want to stay on trend for new flavors and cuisines. Instead, focusing on how restaurants can differentiate themselves from in-home cooking through authentic ethnic flavors, fresh herb combinations, and unique sauce pairings can garner more interest in a restaurant ...

## Magazines - UK

“Publishers need to address a level of unwillingness among consumers to pay for digital content and still be marketed to, a model that is largely ubiquitous in the print magazine market. Publishers need to make a choice between free, wholly ad-supported digital content, possibly in combination with an alternative revenue ...

## Marketing to the Middle Class - China

“As a result of the government’s plans to reduce income disparity and also the living quality gap between rural and urban areas, the minimum wage has been rising in order to encourage China’s domestic consumption. Also, as the government is investing to upgrade the transport infrastructure throughout the country, this ...

## Media Consumption Habits - UK

“Video content spreads globally now. But when demand exceeds licensed supply options, illegal pirating means content spreads anyway, to communities who can become highly engaged with merchandising opportunities even if the content in question remains unavailable in their territory.”

## Nappies and Baby Wipes - China

“Over the past five years, the nappies and baby wipes market has experienced staggering growth, driven by rising awareness of babies’ personal hygiene and the convenience seeking lifestyle, which increasingly makes disposable baby products daily essentials. Despite strong growth, the market for nappies and baby wipes has not reached full ...

## On-premise Beverage Consumption Trends - Brazil

“Although there has been a fall in consumption of spirits in the on-trade sector in recent years, a number of brands, especially spirit brands, are opening their own bars in Brazil. This provides an interesting way to promote consumption and showcase the latest launches. Beer, which is the most consumed ...

## Online Retailing - China

“China’s online retail market has achieved phenomenal growth from nothing in only a few years, and many sectors continue to pursue very rapid growth. There continues to be a strong shift away from the dominance of C2C towards B2C vendors, but many consumers also remain stakeholders in the online retail ...

## Perimeter of the Store - US

“As consumers shop the perimeter more, they are expanding their use of various grocery channels. Nontraditional retailers such as mass merchandisers must be sure that the quality of their perimeter products and the services provided at specialty counters are as important as value to successfully compete with traditional supermarkets.” ...

## Pizza - US

“Frozen pizza brands face growing competition from pizza restaurants, as more consumers are able to spend on restaurant pizza again and a majority of consumers perceive store-bought pizza as inferior. Frozen brands can compete by continuing to focus on convenience, while also pointing to brand quality improvements.”

## Produtos para os Cuidados com a Pele do Rosto - Brazil

## Occupational and Group Pensions - UK

“So far, auto-enrolment has proved a success, but the true test is still ahead. The insurer-administered occupational and group pension sectors are primed for significant expansion, as small and medium-sized employers become subject to new pension duties and millions of new savers are added to the (largely DC) pension pool ...

## On-trade Alcoholic Drinks - China

“When it comes to alcoholic drinks, women’s spending is significantly less compared with men and female consumers are widely considered ‘hard to reach’. Highlighting food pairing and partnering with Asia restaurants in online-based campaigns should be able to help brands stand out when targeting women.”

## Online Shopping - US

“E-commerce sales are growing rapidly, but are still only at the outset of a journey to become the default means of shopping for the vast majority of purchases, including categories currently seen as unsuitable for online sales.”

## Pet Supplies - US

“Pet supply sales are expected to grow steadily in the coming years. To boost sales and stave off competition from private label and nontraditional marketers, companies must combat concerns regarding product safety, improve pet owner engagement, harness the power of the Millennial mom, and develop lifestyle products that resonate with ...

## Prepared Cakes and Pies - US

“Portion-controlled formats, higher-quality ingredients, and new flavors can help consumers indulge in prepared cakes and pies, while maintaining a sense of moderation. Positive perceptions of private label products, which represent the largest share of the market, will increase price competition, but also create opportunities for brand names to differentiate with ...

## Seasonal Vacation Trends - US

"A categoria de produtos para cuidados com a pele do rosto ainda possui uma baixa penetração no Brasil, com apenas sete em cada dez brasileiros afirmando usar produtos do tipo. A sensibilidade dos consumidores aos preços da categoria pode ser apontada como uma barreira à sua popularização. Existem oportunidades para ...

## Shopfitting (Industrial Report) - UK

"Shopfitters will be heartened by economic indicators at the start of 2014, which suggest improved market conditions, though growth in demand is expected to be unevenly split across retail sectors."

## Social Networking - US

"Social advertising spend is on the rise and shows no sign of slowing down. While display ads still play a key role in terms of brand awareness and new product discovery, getting the most out of social media marketing requires a greater emphasis on aiding networkers in conducting deeper research ...

## Student Lifestyles - UK

"Universities are operating in an increasingly competitive marketplace for higher education, with an estimated revenue stream of £18.7 billion in the UK. Domestic institutions are also competing with foreign universities, as more and more students choose to study abroad in search of a lower cost of living and cheaper ...

## UK Retail Briefing - UK

Each month Mintel's UK Retail Briefing concentrates on a particular sector or market. This month's provides a sales analysis by UK region.

## Warehouse Clubs - US

"Warehouse clubs are favored for their competitive prices, bulk items and quality products; however annual

"The explosive growth of peer-to-peer sites for renting or sharing homes, cars, and even meals has shaken up the hospitality industry, as hoteliers look over their shoulder at services such as Airbnb, HomeAway, HomeExchange, and Couchsurfing. While peer-to-peer services will continue to play a role in dampening prices at the ...

## Shopping Locations - UK

"The role of the high street is changing as consumers use town or city centres more for comparison shopping and as local collection points for online orders. City centres and local neighbourhoods are benefiting from growing usage of convenience stores instead of superstores as people do more of their top-up ...

## Sports and Energy Drinks - Brazil

"The relatively low penetration of energy and sports drinks in Brazil may be caused by the restricted communication of their benefits, and by only targeting specific demographics and consumption occasions. It is important to emphasize to Brazilians that energy drinks are not just for young people and not just to ...

## The North African Hotel Sector - Africa

"Although the North African countries have much to offer tourists (warm-water beaches and spectacular heritage sites) and are positioned close to important source markets, hotel performance in the region has suffered due to the Arab Spring, which particularly impacted tourism in Egypt, Libya and Tunisia."

- Jessica Rawlinson, Senior Tourism ...

## Varejo Automotivo - Brazil

"Carros são parte integral do estilo de vida brasileiro. Para pessoas que já possuem automóveis, eles representam um recurso de grande importância, e para a maioria dos que ainda não possuem, são o epítome do sonho de consumo. Contudo, o preço permanece uma barreira muito grande para a posse de ...

## Washers and Dryers - UK

"There are pressures for manufacturers to create ever-more innovative products that serve the lifestyle needs



membership fees deter some consumers. Warehouse clubs can offer more tiers of membership as well as more trial shopping days to promote the value of shopping at warehouse clubs.”

– Ali Lipson, Senior Retail ...

## Web Aggregators in Financial Services - UK

“One of the potential long-term challenges to the price comparison market is the fact that financial services firms are starting to be more active in rewarding customer loyalty. In order to combat this trend aggregators can look at how they reward customers purchasing several products, or allow customers to build ...

of their customers. We expect to see more gadgets, more smart applications as well as carefully crafted product designs. Yet, at the same time, shoppers have the ability to seek out the keenest prices. So ...

## 在线零售 - China

“短短几年内，中国在线零售市场从无到有以惊人的速度增长，并且仍有许多行业继续高速发展。C2C网站为主导的格局迅速向B2C网站转化，但消费者依然是在线零售行业的利益相关方。移动在线零售也异军突起，几乎成为人们日常生活的一部分。

实体零售商所受的冲击仍在扩大，背腹受敌，被迫接受来自传统同行和在线零售商的挑战。然而，互联网使涉足电子商务的传统零售商迎来发展机会，同时单纯的互联网零售商依然难以扭亏为盈。

网购行为包括移动购物已为人们所接受，并成为日常生活的一部分，因而为（单纯互联网和实体）零售商带来新的机遇，以便更强势的渗透至低线城市。由于许多在线零售商依然尚未盈利，他们需要开始提供更多附加价值的服务。还有许多企业正在寻求合作机会，单纯互联网公司和实体零售商相互合作开展线上到线下的商务模式成为一股不断壮大的潮流。”

– 郭马修（亚太研究主任）

## 数码科技趋势 - China

“电脑和手机在我国的拥有率十分高，是领先的消费科技产品细分市场。这两个市场都十分成熟，使用普及率高，更新换代和升级产品是销量增长的主要驱动力。

电脑和手机对20多岁的年轻人来说更加重要，这揭示出消费者生活方式的一个重要转变——即年轻人正远离电视屏幕。

– 黄灿，高级研究分析师

## 纸尿裤和婴儿湿巾 - China

“过去五年间，消费者对婴儿个人卫生意识和便捷生活方式的追求不断升温，纸尿裤和婴儿纸巾市场发展迅猛。在这一趋势的助力下，一次性婴儿产品逐步成为日常生活的必需品。尽管增势乐观，但纸尿裤和婴儿湿巾市场仍未完全渗透至包括一、二、三线城市在内的所有城市地区。这种现象说明，纸尿裤和婴儿湿巾市场在多级城市以及农村地区仍然具有巨大的潜力。中国政府放松独生子女政策，加之蓬勃发展的网上零售业以及现代零售渠道，助势了这股增长势头的强劲发展。

## 针对中产阶级的市场营销 - China

“在中国政府致力减少贫富分化和城乡生活质量差距的努力下，最低工资标准不断调整提高，以鼓励国内消费。同时，政府还投资改善全国各地交通基础设施。这不仅为中西部带来了更多的就业机会，而且随着对汽车和通信行业等高科技岗位需求的增多，居民收入也进一步增长。因此，这使得一批先前收入较低的消费者（通常来自低线城市）跻身进入中产阶级。

## 餐饮渠道酒类饮品 - China

“相对男性，女性在酒类饮品上的花费明显较低，而且女性消费者通常被认为是“难以开拓”的群体。社交媒体和网络论坛等新媒体营销活动能帮助品牌更有效的接触女性消费者。突出与食物的搭配和与亚洲餐厅合作进行网络营销活动应该能帮助品牌在女性市场中有所建树。