

**December 2013**

## **55岁以上中老年消费者生活方式 - China**

再怎么强调55岁以上人群对中国未来经济的重要性都不为过。因而，企业急切需要吸引这一消费者市场，进行相应的产品和服务营销。这不仅只是因为55岁以上人群的重要性，也因为他们会影响照顾他们的年轻消费者的购买选择。向55岁以上人群的成功营销可成为企业在激烈的消费市场中生存的竞争优势。

## **Baby Food and Drink - Brazil**

“Similar to trends seen in adult food categories, Brazilian parents are looking for convenient and healthy foods for their children. While homemade baby food remains the most popular day-to-day choice, processed baby food products can leverage their positioning as convenient as a unique selling point.”

## **Beer - UK**

“The market is having greater success with the newer range of sweeter flavoured/alcoholic ginger beers which are typically positioned as gender-neutral and which are equally likely to be drunk by men and women. These continue to offer a route for beer brands to increase usage and make beer more ...

## **Black Consumers and Personal Care - US**

“Black consumers spend a tremendous amount of their discretionary income on looking good, whether we’re talking about apparel, personal care products, or services. The recent recession had little impact on what Black consumers spent in the personal care category. Expenditures have remained stable and in some cases there have been ...

## **Casinos and Bingo - UK**

“Casinos and bingo clubs are very different types of venue on almost every level, yet still face a number of similar challenges, particularly around relationships with their online cousins, their integration of new technology and the lack of understanding of their core gaming products that colours potential customers’ perceptions of ...

## **Alimentos e Bebidas para Bebês - Brazil**

“Em linha com as tendências em alimentação para adultos, os pais brasileiros estão em busca de alimentos convenientes e saudáveis para seus filhos. Enquanto papinhas caseiras seguem como a opção diária de maior preferência, papinhas industrializadas diferenciaram-se através da conveniência, o seu principal posicionamento de vendas.

## **Beauty Online - UK**

“The money saving appeal and convenience of shopping online has resulted in consumers becoming increasingly comfortable on e-commerce platforms. Engaging with consumers and encouraging online shoppers to browse can help the online experience become more appealing than in-store.”

## **Beer - US**

“Undoubtedly, the biggest competitive threat to beer brands is the likelihood that drinkers will opt for wine or spirits instead of beer. This presents beer brands with a challenge to attract drinkers who may otherwise select a different type of alcohol. Doing so will, in part, entail taking a few ...

## **Budget Airlines Worldwide - International**

This report provides an overview and update about the current state of the low-cost or budget airline sector worldwide. The report is structured along geographical lines, since most of the route networks of low-cost carriers (LCCs) are domestic and intra-regional.

## **Character Merchandising - US**

“As the economy is not in its full swing of recovery since the last recession, patronage at mass merchandisers for character-branded purchases become a compelling option in exchange of value. Retailers are becoming more restrictive with the properties they give shelf space for, causing manufacturers to lean toward a few ...

## Children's Media - UK

“Access to a tablet - either through the child’s personal ownership or through shared ownership in a house - is steadily increasing, and access to video on demand streaming services will increase alongside. The ultimate success of the services will depend on how they are positioned to parents: positioning as a shared ...

## Coffee Houses and Donut Shops - US

“Coffee houses and donut shops have pushed to become lifestyle brands so they can remain relevant through the day and cater to the changing needs of consumers. With coffee houses and donut shops continually adding food items and diversifying their beverage programs, it is increasingly important for them to differentiate ...

## Condiments - US

“Competition from away-from-home dining, coupled with consumer health concerns, can potentially hinder future condiment category growth. However, the increasingly blurred lines between condiments, cooking sauces, and dressings present an opportunity for product development, flavor innovation, and the marketing of expanded usage occasions.”

## Consumer Payment Preferences - UK

“The introduction of mobile payments on the high street was supposed to lead to a rise in demand for facilitating mobile wallet services. However, there is reason to believe that the order of events may have simply been reversed – it is mobile payments that are the natural progression from ...

## Cooking Sauces, Marinades and Dressings - US

“While significant percentages of respondents report that healthful product claims can persuade them to choose one brand of cooking sauce, marinade, dry seasoning mix, or dressing over another, they may not always sacrifice flavor for healthfulness, suggesting that BFY brands should emphasize taste over health claims when marketing.”

## Current Accounts - Ireland

## Coffee - Ireland

“Coffee’s appeal as part of a morning routine, as a ‘pick-me-up’ or as a treat amongst Irish consumers, is likely to see the category continue to perform well in the coming years. In order to drive growth within the market, brands should look to engage in NPD (New Product Development) ...

## Color Cosmetics - Brazil

“With the population rapidly aging, growth opportunities for color cosmetics products lie in creating products with additional benefits aimed to the more mature consumer. There is also great potential for online shopping to be explored by traditional retail and direct sale brands in order to maximize brand exposure and product ...

## Consulting Engineers (Industrial Report) - UK

“There are now tentative signs of more favourable market conditions for UK consulting engineers, which have been negatively affected by the economic downturn in recent years. The rail sector continues to offer strong growth potential through major projects, such as Crossrail.”

## Consumers and General Insurance - UK

“Loyalty or reward schemes could help to improve customer retention. However, Mintel’s research suggests that an annual reduction in premiums is much more likely to drive loyalty than an elaborate rewards programme or discount scheme.”

## Cooking Sauces, Pasta Sauces and Stocks - UK

“Slow-simmered pasta sauces offer another potential means of supporting growth in the Italian sector, as 28% of users state they would pay more for these, despite them being largely absent in the UK market. This slow-cooking method for pasta sauce has connotations of authentic cooking, and is well-placed to appeal ...

## Digital Trends Winter - UK

“The current account market, in particular that of RoI, suffers from a lack of competition, with Irish consumers recognising this. Reluctance to switch current account providers may have more to do with the inconvenience of the process rather than brand loyalty. Moving forward, new legislation to make account switching easier ...

## Entertainment Venues - US

“Live Nation and AEG have emerged as the dominant forces in live entertainment by controlling all aspects of the value chain. Yet, ticket prices have increased while ticket sales have remained relatively flat. There are opportunities for new business models to emerge to reduce ticket prices and increase attendance and ...

## 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.

## Fruit Juices - Brazil

“The sales of ready-to-drink juices are expected to continue to post robust growth. Further switching from fresh juices and powdered juice drinks to ready-to-drink fruit juices is expected to fuel volume sales going forward, in line with recent trends.”

## Grocery Retailing - Ireland

“With the value of own-label grocery products forecast to exceed the value of branded goods from 2015 onwards, manufacturers of branded products will likely begin focusing their efforts on becoming the suppliers of supermarkets’ own-label products to supplement the sales of their core branded goods and increase their overall profitability ...

## Hispanics and Retail - US

“Hispanics are social shoppers. They enjoy shopping and often shop with family and friends. It is therefore not surprising that recommendations from friends and family are the single most influential factor for Hispanic

This report examines the trends in consumer technology and digital media in the UK, looking at changes in device ownership over the past three months, consumers’ purchasing intentions and changes in online activity, and analyses what industry developments are driving these changes.

## Estilo de Vida Regional - Brazil

“Os hábitos de consumo dos brasileiros são diferentes regionalmente. Variam de acordo com a demografia e geografia predominante, com o processo de desenvolvimento econômico e social que cada região está passando e, principalmente, de acordo com a cultura dos seus habitantes.

## First Aid - US

“The first aid market is expected to grow steadily into 2018. To accelerate market growth, companies should focus on the needs of aging consumers, better engage with low-product usage groups like Blacks and Hispanics, and encourage consumers to be more prepared to treat injuries, especially on-the-go.”

## Full Service Restaurants - China

“The full service restaurant market in China has seen a decline in the rate of growth in recent years, impacted by the slackened economic growth. However, the ever-increasing consumer spending power still implies growth opportunities for restaurants which are able to cater to the needs of particular consumer groups.”

## Gum, Mints and Breath Fresheners - US

“The vast majority of category participants turn to its offerings for breath freshening, and half of users do so to get a bad taste out of their mouth. This is a strong indication that product marketing would do well to promote the ability of products to meet these primary needs ...

## Household Hard Surface Cleaning and Care Products - China

“With the population and economy growing, use of household cleaning products is also expected to expand.

buyers. Though obviously neither friends nor family, marketers have an opportunity to replicate the influence of kin ...

## Maquiagem - Brazil

"Com valor estimado de R\$ 4,2 bilhões, e um crescimento de 15,5% em 2013, o mercado de maquiagem no Brasil tem crescido num ritmo acelerado nos últimos cinco anos, com vendas impulsionadas pela inovação de produtos, estabilização da economia do país e maior poder de compra dos consumidores.

## Marketing to Consumers - a Regional Perspective - China

"Companies that want to thrive in China should aim to develop a matrix of China that looks at the local economy development, population and traditional culture simultaneously, and acknowledge that the differences are explained by these three factors together. That said, a harmonious family relationship is the centre of living ...

## Marketing to Teens - China

"As well as being more connected than previous generations, China's teenagers also appear to be more self-centred and value those elements in their current lifestyle that benefit themselves, at the expense of more traditional values such as caring for others."

## Motorcycles - US

"After suffering a calamitous drop in sales during the recession, motorcycle sales are still in decline. The latest crises hitting the industry are more demographic than macroeconomic, with the motorcycle industry struggling with its dependence on an aging male client base."

## Pizza and Pasta Restaurants - UK

"Linking pizza/pasta restaurant/takeaway brands to other lifestyle elements such as music, sport or gaming, which are popular with particular consumer groups, can

To take advantage of this, both domestic and foreign manufacturers are racing to build plants in China to establish their strategic footholds."

## Marketing Financial Services to the Mass Affluent - US

"The affluent segment is multilayered, and all of its layers are of interest to the industry. Although the group is financially comfortable, they are not immune from financial concerns. They are, however, willing to use technology to help them manage their money, and financial services providers need to highlight any ...

## Marketing to Over 55s - China

"It can not be stressed enough how important the over-55s will become to China's economy in the future. There is an urgent need for companies marketing products and services to start taking notice of the over-55s as a consumer market, not just in themselves, but also the younger generations of ...

## Motorcycles - UK

"The motorcycle and scooter market faces a number of challenges as the sector recovers from the recent effects of recession. Sales remain depressed and with rising low-cost imports, the existing players could well be in for a difficult period. Focusing on the large percentage of potential owners is vital in ...

## Natural and Organic Personal Care Consumer - US

"Consumers are expressing some skepticism and apathy toward the natural and organic personal care category. However, this represents an opportunity for brands to be more transparent, show shoppers the long-term value of going green, address consumers based on their current lifestyle needs, and be creative with retailing."

## Plant and Tool Hire (Industrial Report) - UK

"A more positive sentiment emerged in the plant and tool hire sector in the latter part of 2013, as firms began to report improved trading conditions largely off the

also be an effective method in fostering a greater sense of brand loyalty amongst diners.”

## **Power Tools (Industrial Report) - UK**

"Production capacity in the UK among the major industry players has been all but eliminated in recent years, as first the Far East and now Eastern Europe prove the more cost-effective locations for manufacturing, while global demand is biased towards high growth industrial economies such as India."

## **Regional Lifestyles - Brazil**

"Companies and brands interested in competing in specific regional markets must be aware of what defines each region. The North-East is without a doubt one of the most interesting regions in terms of business investment and consumer demand, but it is also the region that most stands out in terms ...

## **Residential Care (Industrial Report) - UK**

"With the UK's over-75 population projected to almost double by 2035, caring for the country's elderly population is an issue of growing importance for the Government. Care in the community has emerged as the preferred option for the majority of care clients, seen as more cost-effective than residential care, however care homes continue to have an important role, providing care to ...

## **Senior Lifestyles - US**

"Today's seniors are living longer, are more connected and informed, and lead a more active lifestyle than they did a few decades ago. As the 76 million strong Baby Boomer generation shifts toward senior status, the future over-65s will be even more diverse, tech savvy, active in the workforce, and ...

## **Small Business Banking - UK**

back of improved construction output performance in the third quarter of the year. Nonetheless, companies have yet to see a significant impact on rates, though this is expected to filter through ...

## **Private Label Beverages - US**

"Stiff competition from global beverage companies means retailers have to work very hard to compete in the private label beverage category. Addressing the needs of key demographic groups, offering products that meet consumer needs for value, quality, and more, as well as playing on the inherent advantages of being a ...

## **Renewable Energy (Industrial Report) - UK**

"The renewable energy roadmap issued by the government outlines how the UK will get 30% of its electricity from renewables in 2020, up from 8.7% in 2011. Such progress is required to happen to ensure the UK meets a binding EU renewable energy target. Renewable energy is rapidly emerging in ...

## **Self Invested Personal Pensions - SIPP's - UK**

"The main winner following increased regulation from the FCA will undoubtedly be the larger SIPP providers. Their economies of scale will allow them to continue to dominate the market, by acquiring their smaller rivals and lowering costs, to appeal to a wider range of consumers."

## **Shopping for Beauty Products - US**

"For most consumers, beauty products shopping is fairly routine. Most buy beauty products to replace items that they use regularly and choose mass merchandisers and drug stores to do their shopping. While they are loyal to retailers and products, there is somewhat of an interest to try new products. Retailers ...

## **Small Kitchen Appliances - UK**

“The small business banking market is afflicted by low levels of competition and low levels of customer churn, but this could be about to change. As more small business customers become aware of new faster switching times and are better able to make comparisons between providers, more are likely to ...

## Small Kitchen Appliances - US

“To succeed in the marketplace, small kitchen appliances must do more than just save time and effort in the kitchen. Opportunities exist for appliance brands to create new experiences and align with consumer lifestyles. Small kitchen appliances can play an integral role in facilitating culinary exploration, enhancing cooking skill, and ...

## Sucos de Fruta - Brazil

"Mais de 90% dos consumidores bebem sucos frescos, sendo que um em cada três o faz diariamente. Os sucos prontos ficam atrás, com os néctares de fruta sendo consumidos por 65% dos brasileiros. No geral, a alta disponibilidade de frutas tropicais no Brasil e a preferência local por alimentos frescos ...

## Suncare - UK

“The rise in the population of the eldest demographics poses challenges as well as opportunities, as although the over-55s are the most knowledgeable when it comes to the dangers of the sun, they are least likely to use sun protection and self-tanning products. However, as they continue to seek tans ...

## The Laundry Consumer - UK

“Both the growth in the number of households and the increase in the total size of the population are important in terms of their potential to drive increased demand for laundry detergents and appliances. Forecast growth rates vary depending on age and lifestage, but perhaps more importantly it is their ...

## Travel Agents - UK

“As the advent of concept stores shifts the role of stores towards offering an inviting experience rather than just

“Despite the economic gloom that has shrouded consumers in the last five years we have seen significant demand for coffee machines and food mixers. People’s love affair with good coffee stemmed from enjoying their coffee shop experiences and now they want to create coffee shop quality at home. And, what ...

## Streaming Media: Movies and Television - US

“While copycat services might ordinarily be seen as lacking in points of differentiation, in the case of streaming video services, the elements of service are so few that each service will end up carrying each feature of its competitors, or fall by the wayside. Alternatively, brands can aim for differentiation ...

## Sugar and Gum Confectionery - UK

“There is likely to be significant rewards for players in the sugar confectionery market who tick the boxes in terms of both taste and health. As well as appealing to health-conscious consumers, this would also help brands to proactively stay ahead of the ‘state stick’ and boost their reputations as ...

## Table Sauces and Seasonings - UK

“Through adding premium ingredients or repositioning products as a gourmet alternative, table sauce and seasonings operators are looking to attract consumers looking to upscale at least a part of their dining experience. Such innovation should be well placed to chime with the ongoing rise in consumer confidence and to tap ...

## The Savvy Shopper - UK

“Mobile platforms and tools are already changing the savvy shopping repertoire. Increasing adoption of smartphones and tablets, as well as increased availability of online connectivity, signal a bright future for m-commerce and t-commerce.”

## UK Retail Briefing - UK

facilitating transactions, travel agents need to avoid declaring a given store a success or failure based on in-store sales. The maintenance of a loss-making, but high-footfall store should instead be viewed ...

## Visitor Attractions - UK

“Multi-user touch tables and touch screens are increasingly being used by attractions to increase engagement now that consumers have become familiar with the concept of manipulating content on a touch screen to zoom in, zoom out or move it around.”

## Youth Fashion - UK

“In order to compete in a changing young fashion landscape, clothing retailers need to do more to entice young customers to part with their cash. Exciting stores, large fitting rooms, innovative websites, on-trend garments and exclusive collaborations with popular musicians and celebrities are among the factors that will help retailers ...

## 全服务餐厅 - China

受经济增长放缓影响，近年来，中国全服务餐厅(即提供餐桌、服务生服务且通常在餐后买单的餐厅)市场的增速有所回落。然而，随着消费者消费能力的不断上升，能够迎合特定消费群体需求的餐厅仍然拥有增长机遇。

## 针对青少年的营销 - China

手机、在线视频和社交网络是当今青少年生活的重心，取代了一度由电视和音乐占据的主导地位。如今的青少年一半以上的闲暇时间用于与亲朋好友社交，包括面对面的交流和科技辅助的交流（互联网和手机）。然而，越来越多的证据显示，即使在与朋友碰面的时候，青少年仍然会同时使用数字通信。

Each month Mintel's UK Retail Briefing concentrates on a different sector or channel and this month we look at the rapidly growing ecommerce channel.

## Vitamins, Minerals and Supplements - US

“While vitamin sales are robust, there are a few factors that could contribute to a decline in the category. As consumers continue to eat a healthier diet, the need for a separate supplement could be eliminated. Additionally, negative press about the quality and necessity of vitamins could erode usage and ...

## 中国消费者——区域分析 - China

希望在中国蓬勃发展的各公司应从当地经济发展情况、人口和传统文化这三方面入手对中国的具体情况进行矩阵分析，并理解上述三方面综合是产生差异的原因。尽管有差异，和谐的家庭关系仍是人们生活的核心，这与年龄、收入、地理位置或社会地位无关。因此，以家庭价值观为核心的市场营销仍很重要。

## 家用硬表面清洁护理产品 - China

中国家用清洁产品行业在过去十年经历了爆发式发展。目前，中国家庭硬质表面护理和清洁产品的市场规模全球第二，仅次于美国。尽管如此，该市场有待开发，增长潜力巨大。城市消费者（尤其是中产阶级消费者）的住房拥有率正快速上升，家用电器和家具的拥有量也日益增长。