

## August 2012

### Airlines - US

A strong market for air travel in 2011 produced a 9.5% increase in operating revenue for 2011 vs. 2010. However, high fuel prices for the year caused U.S. airlines to see a 32% decline in overall profits. While revenues are expected to gain 9.9% in 2012, the ...

### Attitudes towards Family Dining - UK

“With a wealth of in-home/retail food innovation aimed at children, which is designed to achieve multiple goals (eg appeals to both parents through nutritional claims as well as children through character merchandising), foodservice operators need to up their game in terms of separate children’s menus/products.”

### Bathrooms and Bathroom Accessories - UK

“People are living in smaller homes and yet the amount of stuff they need to store continues to grow. Bathrooms are filled with toiletries, cosmetics, shavers, electric toothbrushes and more, so demand for stylish storage continues to rise. All this is helping to fuel demand for modular bathroom furniture – ...

### Brand Perceptions of Canadian Financial Institutions - US

Canadian financial institutions generally have good reputations, and Canadian financial banking and insurance companies are regarded as some of the safest in the world. However, Canadian banking and insurance consumers have varying opinions about financial services brands and the customer experiences they provide. This report takes a closer look at ...

### Business Traveller - UK

“The current issues over waiting times at Heathrow Airport’s border control – often characterised as a particular problem for business, given the travellers who use the airport and concerns over the ‘impression’ that it gives potential investors in the UK’s economy – is a particularly good opportunity for international rail ...

### Annuities - UK

“The annuity market will be required to undergo some changes in order to keep pace with the changing pensions industry as a whole. Regulation will be a key factor in framing these changes as the industry will have to adapt to a new regulatory landscape over the next year or ...

### Automotive Cleaning Products - US

The vast majority of vehicle owners wash/clean their cars. With more than 250 million registered vehicles on the road, according to the U.S. Department of Transportation, how marketers can reach these car owners regarding auto cleaning methods is of great importance.

### Black Haircare - US

The Black haircare market is estimated to be \$684 million in 2012, a slight decrease from the \$687 million posted in 2007. This category has been impacted by the prolonged recession, which has hit Black consumers harder than it has the general population. While this has been beneficial for the ...

### Breakfast Cereals - UK

“The breakfast cereals market has remained largely unchanged in terms of packaging for decades. Yet with almost eight in ten consumers interested in buying a cereal with resealable packaging there is considerable unmet demand for packaging solutions which will keep cereals fresher for longer. There is an opportunity for cereal ...

### Candles - US

Candle sales have been declining over the last few years as a result of macroeconomic conditions that have caused consumers to scrutinize how they spend their dollars and take steps to minimize their spending of discretionary income. However, some candle brands in the FDMx market have posted sales growth during ...

## Casual Dining - US

Mintel's consumer survey finds that 52% of respondents visited a casual dining restaurant for lunch and 69% of respondents visited a casual dining restaurant for dinner in the last month. Party size and check average varied by daypart with lunch bringing in an average of \$12.66 per person, while ...

## Colour Cosmetics - UK

"The lipstick effect holds true, with women continuing to invest in their looks and treating themselves to little, affordable luxuries. Women might not have control over what happens with national economics, but they can take charge of their personal appearance."

## Construction - Ireland

The construction sector experienced phenomenal growth in value and quantity of building during the boom years up to 2007. While both the NI and RoI economies benefitted from the significant amount of new building and infrastructure that was put in place, there was also substantial overbuilding (particularly in RoI), during ...

## Convenience Stores - US

Mintel's proprietary research finds that overall usage of convenience stores is far-reaching, and frequency of visits is high. However, challenges exist for industry players to establish brand loyalty. A highly fragmented retail landscape and a potluck-style product mix contribute to the common consumer perception that convenience stores are "all pretty ...

## Desktop, Laptop and Tablet Computers - UK

"The launch of Windows 8 will provide opportunities to tablet manufacturers not only because the interface was designed for use on tablets from the ground up, but also because Microsoft's Windows Store should prove attractive to developers as the company is providing financial incentives that undercut Apple and Google."

## European Retail Briefing - Europe

## Children's OTC and Healthcare Products - UK

"Adopting a more holistic approach could give a good boost to the Children's OTC market. Providing parents with skills to offer their baby relief from symptoms of minor ailments such as colic, teething, and constipation will be key to expanding the children's OTC market. Independent healthcare companies could take a ...

## Condiments - US

Sales of condiments grew by 15% from 2007-12 (4% when adjusted for inflation), with the sharpest jumps coinciding with the onslaught of the recession. The category saw sales increase by 5.6% in 2008 and 6.2% in 2009. This is a clear indication that condiment sales can sustain periods ...

## Contract Cleaning (Industrial Report) - UK

Industrial market reports from MBD industrial (a recognised authority in these markets) have added a new dimension to the breadth of research offered by Mintel. These industrial titles complement Mintel's existing consumer range, covering sectors such as building and engineering, and now featuring new business and professional/office sectors ...

## Dark Spirits - UK

"Many women (and men) are currently being asked to make the large jump from non-users into a market with a demanding image and taste profile. Providing these potential users with a path of progression into more sophisticated whiskies, an approach used effectively by Johnnie Walker in the US, should help ...

## Digital Movie Sales and Rentals - US

This report explores the market for digital movie sales and rentals, including all television and film programming sold via an intangible file. Commentary throughout provides actionable insights to digital marketers and brand managers via the review of innovation in the market and the attitudes and habits of consumers in relation ...

## Fabric Care - UK

European Retail Briefing is a monthly briefing providing news and analysis that includes company results, store openings, cross-border moves, M & A activities, executive changes and property developments. Additionally each month, European Retail Briefing focuses on a key issue or specific European retail sector. The month's retail news is ...

## Furniture Retailing - UK

"When retailers start discounting they get a rush of new business, but continued use of the same tactics quickly becomes tired and less effective. Today's best furniture retailers are using a more innovative range of techniques to inspire customers buy through understanding their lifestyles, style aspirations and having a clear ...

## Holidaywear Shopping - UK

"The rise in domestic holidays means that retailers and brands need to expand their definition of holidaywear away from the traditional beach clothing and swimwear collection. There is potential for holiday clothing to include a wider selection of outfits such as festival collections, as well as clothes suitable for the ...

## Hotels in China and the Special Administrative Regions - International

This report provides an overview of recent developments in the Greater China hotel sector (including Hong Kong and Macao). Following a review of the outlook for spending on travel and tourism in China, the country's hotel capacity and performance are evaluated, as well as the major urban hotel markets. The ...

## Ice Cream - China

"China's ice cream market grew from 2007-12 with a volume compound annual growth rate (CAGR) of 4.6%, rising to an estimated 3,072.5 million litres in 2012. Value compound annual growth rate rose at 8.1% from 2007-12, growing to an estimated RMB42.4 billion as manufacturers increasingly ...

## Laptops and PCs - US

"With a decline in sales seen over the last year, fabric care brands need to look at a variety of different angles for creatively promoting usage of their products. A variety of themes could be used to prove the effectiveness of products, including getting rid of stains from and freshening ...

## Furniture Retailing - US

Total retail sales of furniture reached \$67.5 billion in 2011 and are expected to reach \$68.8 billion in 2012. The furniture market saw sales decline in 2008-10 as a result of the recession yet is expected to rebound in the near future, growing by 22% between 2012 and ...

## Holistic Holidays in Asia - International

*"Human beings are made of body, mind and spirit. Of these, spirit is primary, for it connects us to the source of everything, the eternal field of consciousness."*

## Household Batteries - US

The household batteries market has declined 10% between 2007 and 2012 as many of the most power hungry mobile devices, such as cameras, music players, and others, have shifted to dedicated or built-in rechargeable power sources. Still, household batteries remain a ubiquitous presence in the home and are widely used ...

## Innovation on the Menu: Flavor Trends - US

While a restaurant may operate for months, years, and decades on end, the menu rarely stays the same. Flavor preferences and trends come and go, and consumer expectations change with them. Indulgence is important on one hand, but with growing nutritional awareness and pending menu-labeling regulations, offering better-for-you (BFY) items ...

## Lifestyles of the Ultra-affluent and HNWIs - UK

Computers have become important productivity and communications tools and have brought an endless stream of content via the web to the majority of U.S. homes. In doing so, these hardware portals to the online world have become a significant, \$48 billion market according to Mintel's estimates. However, as user ...

## Live Entertainment - US

This report explores the live entertainment market in the U.S. It provides insight into the external and internal factors affecting ticket sales and what they mean for future ticket sales, marketing and promotional campaigns and industry innovations.

## Managing Finances - Ireland

Increased unemployment and the severe squeeze on household incomes brought about by the recession have put consumers' management of their personal finances into sharp focus. Many Irish consumers are struggling to cope, while some others are in severe difficulty. Only a minority have been entirely unaffected.

## Music and Video Purchasing - UK

"Music and video retail for a relatively low price point, remain popular across all age ranges, and the multitude of purchase or rental, hardcopy, download, standard, high-definition or streaming options means there is a channel to market, quality variant and ownership model suitable for every consumer. Despite this, year on ...

## Nuts and Dried Fruit - US

The \$7.2 billion dollar nuts and dried fruit category fared well during the recession and beyond, posting a gain of 36.1% in dollar sales from 2007-12. The category has likely benefited from the health perceptions associated with it, as well as constant innovation and a strong private label ...

## Pizza - UK

"There does seem to be room in the market for healthier lines but manufacturers must be careful how to market

"The desire for special treatment is strong amongst the ultra-affluent and High Net Worth demographic. The majority enjoy splashing out on restaurant meals and have shown that they are prepared to pay extra for premier seating. Coupled with high brand loyalty, this finding provides great opportunities for brands to establish ...

## Luxury Goods Retailing - International

This report differs from other Mintel retail titles in that it looks primarily at companies involved in design, manufacturing and distribution, rather than traditional retailing. However, many luxury houses are increasingly focusing investment on directly-operated stores in favour of wholesaling to third party distributors. But the reported revenues from these ...

## Marketing to Millennials - US

Millennials are taking increasingly prominent roles as consumers and in the workforce, and in so doing have captured the attention of retailers, employers and government officials who are growing more cognizant of these young consumers' preferences and overall market potential. Millennials are in large part the driving force behind incorporating ...

## Music Concerts and Festivals - UK

"While the growth of social media has allowed more and more people to have their say about live music, there still remains a disconnect between the promoters and fans and putting on live music continues to be a very entrepreneurial activity where instinct, experience and gut feeling guides promoters in ...

## OTC Pediatrics - US

The OTC pediatrics category has estimated total U.S. 2012 sales of \$1.4 billion with an increase of 7.5% versus a year ago. As impressive at that figure is, it would undoubtedly be even larger if not for a number of recalls in recent years from high-profile companies ...

## Prepared Cakes and Pies - US

U.S. sales of prepared cakes and pies have weathered the recession and slow economic recovery with steady

the healthiness. Considering pizza's strong image as a treat, overtly marketing a new line as low fat or low-calorie may position it too far from anything resembling temptation to succeed ...

## Serviced Offices (Industrial Report) - UK

Industrial market reports from MBD industrial (a recognised authority in these markets) have added a new dimension to the breadth of research offered by Mintel. These industrial titles complement Mintel's existing consumer range, covering sectors such as building and engineering, and now featuring new business and professional/office sectors ...

## Telecommunications - Ireland

As the standard mobile phone market begins to decline in usage, the smartphone industry is expanding strongly in terms of handset usage and data usage.

## Travel and Tourism - Iran, Islamic Republic of

Strategically located between the Gulf of Oman, the Persian Gulf and the Caspian Sea, Iran is bordered by Iraq to the west, Turkey, Armenia and Azerbaijan to the north-west, Turkmenistan to the north-east and Afghanistan and Pakistan to the south-east. Although classified as being in the Asia-Pacific region by the ...

## Travel and Tourism - Saudi Arabia

The Kingdom of Saudi Arabia remains a tourism enigma. In terms of arrivals, it is the most visited country in the Middle East by some margin, however, it is remarkably difficult to gain access to. The reason is that the country supports a very unique form of tourism. Unless the ...

## Travel and Tourism - United Arab Emirates

The United Arab Emirates (UAE) is a federation of seven states (Abu Dhabi, Dubai, Ajman, Fujairah, Ras al

growth between 2007 and estimated 2012 levels. Consumers apparently have found a degree of comfort in RTE cakes and pies even as they limited spending on many other items. Still, the effect ...

## Sports and Energy Drinks - UK

“With around three in ten consumers sceptical that sports and energy drinks ‘do what they claim’ the market should take inspiration from the cosmetics industry in terms of proving the science behind the functional claims, helping to justify the category’s position as a more expensive product and alleviate any concerns ...

## The Private Label Hispanic Consumer - US

According to the U.S. Census Bureau, the Hispanic population is expected to reach 61.1 million by 2017, a 15.6% increase from 2012. Additionally, Hispanic spending power is expected to climb to nearly \$1.7 trillion by 2017, from nearly \$1.2 trillion in 2012. Hispanic households are ...

## Travel and Tourism - Oman

Oman is emerging as one of the most attractive tourism destinations on the Arabian Peninsular. Clearly defining itself as a niche upmarket cultural and ecotourism destination, it stands out distinctly from the type of tourism offered by Dubai in the United Arab Emirates (UAE), which mainly focuses on sun, sea ...

## Travel and Tourism - Tunisia

North Africa's smallest and most northern country stepped onto the world tourism stage back in the 1960s, when it began to court European tourists searching for beach holidays with guaranteed sunshine. Back then, a lengthy coastline lapped by the warm Mediterranean Sea and boasting around 800 beaches was its chief ...

## Travel and Tourism - Yemen

Yemen is the southernmost country in the Middle East, nestled on the shores of the Red Sea and the Gulf of Aden. As one of the less well-known Gulf countries, its



Khaimah, Sharjah and Umm al Qaiwain) representing one of the most important economic and political players in the Middle East. The UAE is one of the most liberal countries in the Gulf ...

## UK Retail Briefing - UK

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tourism industry attracted only half a million travellers in 2010 and it is not a country synonymous with tourism ...

## Yogurt and Yogurt Drinks - US

While sales in a variety of CPG categories declined in response to the economic downturn, the yogurt category has proven to be quite resilient. U.S. retail sales of yogurt drinks reached nearly \$6.4 billion in 2011, up 31% from 2007.