

**July 2011**

## **Agriculture and Farming (Industrial Report) - Ireland**

The agricultural and farming sector is one sector that can help lead a sustained economic recovery for Ireland. The sector supports a number of jobs, while also providing vital products for domestic use and exports abroad. Inflation in food prices will also help to boost the market value of the ...

## **Attitudes Toward Independent Restaurants - US**

Independent restaurants have an appeal in that they are unique and better able to adapt to trends than their chain counterparts. The economic downturn has been challenging for the restaurant industry overall, and independents have been especially hard hit.

## **Body Care - US**

FDMx sales of body care products reached \$992 million in 2011 (est.)—an increase of only 5% since 2006 at current dollars and a decline when accounting for inflation. Poor economic conditions and lack of significant innovation in the marketplace are the culprits. The category is mature; the majority ...

## **Cereal, Energy and Snack Bars - Europe**

Cereal, energy and snack bars straddle a fine line between healthiness and indulgence. Positioned as a snack, they carry the negative connotations associated with snacking, but also have more positive credentials as a healthier snack alternative. In fact, indulgence is still an important driver of the European snack bars market ...

## **Color Cosmetics - US**

The color cosmetics category grew by 5.1% in 2010 and is forecast to increase another 5.9% in 2011. Growth has been driven largely by aggressive promotions, development of products that met key price points and

## **Attitudes to Internet Advertising - US**

Advertisers are steadily shifting their attention and money from traditional channels, like TV and newspapers, to online formats. At the same time, rapidly evolving technology is changing how consumers behave online, increasing consumption of video and encouraging a socially-networked experience. In this environment, advertising companies must stay on top of ...

## **Biscuits, Cookies and Crackers - Europe**

Retail value sales of biscuits, cookies and crackers reported positive growth during the 2004-10 period, supported by rising demand but also by higher retail selling prices, which reflect the rising cost of raw materials such as cereals, cocoa and palm oil. Volume sales increased to a different extent by country ...

## **Boutique Hotels in the US - US**

This report provides an overview of the US boutique hotel sector. After reviewing the current outlook for spending on travel and tourism in the US and for hotel performance, the various types of boutique hotel operators are reviewed and analysed, including: dedicated boutique hotel chains such as Joie de Vivre ...

## **Collective Investments - UK**

“Unlike in many other financial sectors, where additional regulation is seen as a costly burden, in the collective investment industry the imminent arrival of various new reforms and directives will provide fresh opportunities for investment companies and fund managers to expand and diversify.”

## **Colour Cosmetics - Eyes, Lips, Nails - Europe**

“Mintel’s estimates of average spend on make-up products finds the highest spenders in Spain, followed by Italy, where the typical woman’s basic make-up kit

the elimination of poorly performing lines. The food, drug and mass segment (not ...

## Colour Cosmetics - Face - Europe

Value sales of colour cosmetics overall as well as face make-up specifically continued to grow in the big 5 European countries in 2010, thanks greatly to the so-called 'lipstick effect' which sees sales of inexpensive treats increase in times of recession, and new product development. Recent innovation has been focused ...

## Consumers and The Economic Outlook - Quarterly Update - UK

The report includes an overview of the changes in household well-being over the last three years, a breakdown of planned and recent spending, and consumers' assessment of the potential impact of the government's austerity measures.

## Credit and Debit Cards - US

The credit and debit payment marketplace has been undergoing significant change in recent years—partly as a result of changing consumer behavior due to the Great Recession, and partly due to other changes such as changes in the regulatory environment.

## Drinking in the Home - UK

“While price remains the overriding reason for consumers to drink at home, other factors are emerging as reasons for consumers to look at drinking in the home less as a financial necessity and more as a positive choice, such as intimacy of the surroundings and relaxation. The off-trade can leverage ...

## European Retail Briefing - Europe

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 ...

would cost some €80 to replace. This compares to just € /£50 in Germany and the UK.”

## Conditioners and Treatments - Europe

The big 5 European countries put on a varied performance in regards to sales of conditioners and hair treatments in 2010, with market value up in France, Spain and the UK, but Germany and Italy posting a modest decline. Valued at €414 million, France is by far the largest market ...

## Credit and Debit Cards - UK

“The difficult economic backdrop has made consumers more aware of the consequences of using credit and being in debt. Although consumers continue to use their credit cards when purchasing goods and services, a growing number see their card as a useful payment tool rather than as a way of borrowing ...

## Digital Trends Summer - UK

Although the market for fixed-line broadband penetration stands at nearly 70% of UK households, this figure hides some considerable variations by demographics. Most notably those aged 35-44 are two and a half times more likely to be broadband users than the over-65s. Furthermore those in rural and other remote areas ...

## Eating Out Review - UK

“Value remains a key issue in 2011 as consumers are expected to remain cautious, with price promotions also an ongoing theme in the market. However, the emphasis now is on cultivating a ‘want to buy’ mentality amongst diners, to distract them from price comparisons and play to their demands for ...

## Fashion - Size Matters - UK

“With less than a third of women finding it easy to buy clothes that fit, it can evidently be a struggle for most women to get the correct size, cut and style for their highly variable body shapes. If retailers made shopping for clothing more straightforward by standardising their clothing ...

## Food and Drink Vending Trends - US

The vending industry roughly dates back to 215 B.C., when the first vending “machines” were located in Egyptian temples and dispensed holy water in exchange for coins. Since then, the industry has evolved considerably, of course, with many ups and downs along the way. Most recently, the food and ...

## Hispanics and Convenience - US

Though their average household income is less than that of non-Hispanics, Hispanic purchasing power is on the rise and many do not hesitate to spend their money on the things that matter most to them in life. Many Hispanics hold on to the values of a strong work ethic, caring ...

## Holidays on the Internet - UK

“Online security and putting together holidays easily are key issues for consumers, while how best to address UGC (User Generated Content) reviews and the potential impact of Google Travel are particular concerns for operators. Meanwhile, improved infrastructure in the UK and the rise of mobile facilities should ensure that holidays ...

## Household Cleaning Equipment - UK

“In a market where own-brand purchases are most common and price is the major factor influencing the choice of cleaning cloths, brands face a challenge in encouraging shoppers to pay a bit more for their products. Durability presents the best scope for encouraging shoppers to pay a little bit more ...

## Ice Cream and Frozen Novelties - US

Recession-inspired frugality and increasing health consciousness have conspired to turn the overall \$10.2 billion FDMx ice cream and frozen novelties market's sales trend negative in recent years. But in spite of these constraints, consumers' love affair with frozen treats is as strong as ever, and opportunities exist across the ...

## Healthy Living - US

As the obesity epidemic continues to bring awareness to the state of healthy living in the U.S., consumers are searching for new and better ways to eat right, exercise and create balance in their lives. Companies, facing rising health insurance costs for their employees, are also working to encourage ...

## Holiday Shopping - US

The U.S. holiday shopping market has been hampered by the slow-moving economy, as anticipated holiday spending for 2010 increased by only 1.3% over 2008, and only the winter holidays (Thanksgiving, Christmas, Hanukah and Kwanzaa) managed to grow anticipated expenditures during this period. However, the National Retail Federation's estimates ...

## Hot Beverages - Ireland

Ireland is renowned as a nation of tea drinkers, with amongst the highest levels of consumption per capita globally, the average person drinking around four cups per day. Although coffee consumption is typically less prevalent than tea, the rise café culture across both NI and RoI, is set to drive ...

## Ice Cream - UK

“Ice cream is most typically eaten as a treat, signalling the role of the category as being first and foremost about indulgence. Reflecting this, favourite flavour is most commonly quoted as an important choice factor when buying ice cream. A unique flavour signature, where consumers can discern the difference, could ...

## Indonesia Outbound - Indonesia

Indonesia possesses a fledgling outbound market, dominated by wealthy middle-aged Indonesians who prefer to head to regional destinations, chiefly Malaysia and Singapore. Fewer than 1% of Indonesians travel abroad each year, heading overseas for a multitude of reasons, but shopping and the opportunity to sample different food remain the biggest ...

## Leisure Centres and Swimming Pools - UK

“There is a major opportunity for trusts and contractors to diversify into budget gyms, which is a fast-growing sector within the private health and fitness industry. They could do this both on their own accord (eg by opening their own private facilities independent of councils) or by opening smaller ‘infill’ ...

## Marketing to College Students - US

Americans are attending college in record numbers, and it is increasingly seen as a requirement for young people, rather than an option. The increase in college attendance is impacting the lifestyles of young adults in a variety of ways. Many are postponing marriage and childbirth as they seek education and ...

## Marketing To Young Couples - UK

There are almost 16 million adults aged 16-34 living in the UK of which almost three in ten (4.6 million) are either married or living with their partner. The length of time that they have been together as well as the commitment that they have made to one another ...

## Mobile Phone Service - US

In recent years, mobile phone services have expanded far beyond voice and texting to offer a rich array of communications, information and entertainment offerings to millions of consumers. According to the CTIA, as of December 2010 there were approximately 303 million wireless subscribers, representing 96% of U.S. consumers. These ...

## New Cars - US

This report explores the new vehicles market in the U.S. It provides insight into the external and internal factors affecting new vehicle sales, consumption and developing trends, and what they mean for future sales, promotional campaigns and industry innovations. Specific questions that are answered in this report include, but ...

## Pizza - UK

## London Olympics: What the Games Mean for Business - UK

“The difficulties the London 2012 Olympic Games have encountered in achieving pre-event targets for increasing sports participation rates, the change in the economic climate that has taken place since the city was awarded its hosting rights in 2005 and the threat of legal action against ambush marketers have all combined ...

## Marketing to the Modern Family - UK

Running analysis on Britain’s parents, Mintel has identified four mutually exclusive groups based on how close-knit their relationship with their children is. These groups will be analysed in greater detail within this report. This report identifies the key characteristics of each family typology and helps understand their relationship with their ...

## Media Consumption by the Black Consumer - US

According to the U.S. Census Bureau, by 2015 the Black population will reach 42.1 million, an 11.7% increase from 2005. Further, according to the Selig Center for Economic Growth, Black buying power is on the rise and is expected to climb to \$1.1 trillion by 2014 ...

## Movie Theaters - US

Domestic movie theater admissions have been on the decline since 2002. While ticket price hikes have kept box office revenues afloat for most of the past decade, 2010 saw box office revenues lose momentum. In this report, Mintel examines how current trends are impacting the market landscape for theater exhibitors ...

## Online and Mobile Shopping - US

While the recession and persistently low consumer confidence levels have dragged down sales in many sectors of the U.S. retail market in recent years, online and mobile shopping have been bright spots. Throughout the recession and recovery, ecommerce sales have grown at a significantly faster pace than offline retail ...

## Residential Flooring - US

“Although pizza has avoided the kind of negative press that has traditionally been directed at other fast food, such as hamburgers and ready meals, it is tarred with the same brush, when it comes to healthiness, in the eyes of the consumers.”

## Retailing in Emerging Markets - Europe

For the 2011 edition of the Retailing in Emerging Markets report we have added a number of new markets to extend our coverage. As a result this year's edition includes coverage of 15 European markets in Central and Eastern Europe, plus Turkey. The new markets covered in this edition are ...

## Short-haul Holidays - UK

“The domestic market gained significant holiday market share in 2009 and maintained it in 2010. The positive news for short-haul operators is that half of consumers still see holidaying in Europe as great value for money compared to the UK despite the weak Pound - a perception aided by falling resort ...

## Tea and RTD Teas - US

This report explores the tea and ready-to-drink (RTD) tea market, which grew 31% from 2006-11, primarily on the strength of the RTD segment. The market continues to thrive on the pro-health perception of tea coupled with the fact that manufacturers have been savvy in bringing out consumer-preferred teas in innovative ...

## Term Assurance - UK

“Increasing consumer education and engagement with the sector will be vital in growing the term assurance market. There's a natural tendency to avoid thinking about difficult subjects, and there are few subjects as difficult as one's mortality. That, and the perceived complexity and expense of life cover is causing many ...

## Vacuums - US

The \$2.7 billion vacuum market has continued to face challenges as low consumer confidence and a depressed

Even though sales of flooring products fell from \$19.6 billion in 2009 to an estimated \$16.3 billion in 2011, the category is full of new opportunities. This report explores them, along with specific recommendations for capitalizing on the changing landscape of the flooring category. Some of the topics ...

## Sexual Health - UK

“Many years ago Katherine Hamnett's T-shirt designs incorporated a small condom pocket – could this return as a design feature, either by way of a condom brand extending into the underwear market or as a special line designed by an underwear company such as Calvin Klein?”

## Sweet and Savoury Spreads - Europe

The spreads market continued to grow throughout the recent recession, driven by a desire for indulgence and a demand for new natural and functional spreads. Sweet spreads remain a staple food, although the penetration of jams, for example, is threatened by the growing use of breakfast cereals, lower sales of ...

## Technology and the Over-55s - UK

“Compared to the younger generation, the over-55s are more likely to use technology as a functional tool rather than a source of recreation. This bias may have put older consumers off buying new technology products that, despite being primarily associated with entertainment, can also contribute practical benefits to their everyday ...

## UK Retail Briefing - UK

UK 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, UK Retail Briefing focuses on a key issue or specific UK retail sector. The month's retail news is ...

## Washers and Dryers - UK

“The pace of change in laundry appliances has been breathtaking as manufacturers have pushed the

housing market have limited market growth. After a steep drop in sales in 2008, in 2009 and 2010, growth has been positive, but modest. Interest in sanitizing steam mops, bagless uprights and ...

## Web Aggregators in Financial Services - UK

“The price-comparison market struggles when it comes to differentiation. Although each site has its strengths, most are offering a similar range of products, targeting similar customers. Mintel’s research shows that there is scope for a site to carve out a niche for itself by building a more distinctive image.”

## Wine - UK

“As with Champagne leveraging its French sophistication, the key brand for any wine is its country of origin and Mintel’s research shows that Italy, France, South Africa and Australia are all well positioned to exploit the perceived superior identity of their wines

boundaries of capacity, energy efficiency and functionality. New models wash the clothes faster than before and at lower temperatures and incorporate technology that takes the guesswork out of selecting the best programme, or deciding how ...

## Wine - Europe

Wine innovation in Europe remains dynamic, although the number of launches has declined in relation to 2009. The markets are recovering after a downturn caused by the recession, which led to reduced volume and value growth. The leading wine markets (France, Italy, Germany, Spain and the UK) are growing again ...

## Women's Bodycare and Depilatories - UK

“Women are plagued with any number of body issues and while body care products are available on the market to treat every conceivable aesthetic problem, half of women are likely to opt for a general-purpose moisturiser. Brands that deliver measurable results could potentially turn this around. In face care, for ...