

## October 2011

### Air Fresheners and Air Care - Europe

“One of the focus areas of recent product innovation has been continual or automatic scent release, with increasingly sophisticated fresheners now allowing the user to control the intensity of fragrance and the time intervals for fragrance release. However, the way a freshener releases the scent is only important to a ...

### Australia and New Zealand Outbound - Asia Pacific

Australia and New Zealand are both high-profile destinations on the world tourism stage but their own citizens are equally important to global tourism. Over 9 million travellers left these two countries in 2010 to holiday, take in new cultures, conduct business and visit friends and relatives (VFR) abroad. On balance ...

### Bedrooms and Bedroom Furniture - UK

“Bedrooms are becoming places where people need to store a lot of possessions, often in tricky or small spaces. So bedroom furniture is designed to be much more adaptable to allow shoppers a range of options, so they can customise the kind of storage they need. Also, customers tell us ...

### Car Service and Maintenance Repair - UK

“Cost is one important factor behind choice of service agent, as six in ten drivers are keen not to fall victim to a garage that recommends more work than necessary in order to charge more and a third look for low labour charges. One way for garages to increase custom ...

### Cheese - US

The cheese market has not fared well in the economic downturn as consumers cut back and traded down. Total U.S. sales were down in 2009 and 2010, and a meager rebound in 2011 is likely due in part to price increases, more so than volume sales.

### Air Fresheners and Air Care - UK

“While air care products are widely used, using them continually or most days is less common than occasional usage. A large proportion of people are still put off using air fresheners as they see them as artificial, so brands need to reach out to those who want to maintain a ...

### Baby Boomers Across Seven Categories - US

Companies must have a clear understanding of the Baby Boomer demographic in order to market products and serve their needs better. Mintel has compiled information from multiple Oxygen reports and Mintel Inspire to give you a holistic view of today’s Baby Boomer consumer.

### Beer - Europe

Both on-trade and retail sales of beer continued to decline in 2010 across Europe. A general decline in alcohol consumption, combined with depressed consumer spending, was behind weak volume demand and growing price sensitivity.

### Cheese - UK

“Many consumers appear to increasingly view cheese as a small indulgence for which health is not a major consideration. A poor perception of low-fat options is one of the main barriers to growth of the segment as 44% think that reduced-fat cheese tastes bland, with males in particular holding this ...

### Children's Lifestyles - UK

“Being the digital natives, today’s children are well versed in all aspects of technology and the internet, and despite the age restrictions, an estimated 0.97 million children aged 7-12 use Facebook on a daily basis. Friends’ acceptance is an important factor driving social network adoption, but peer influence is ...

## Clothing Retailing - Europe

This report looks at clothing retailing in Europe. As in previous years, the focus of the European clothing report is the clothing specialists, because these are the dominant players in the sector. Nevertheless, for each country in this report we provide total consumer spending data for clothing – which includes ...

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## Coffee - US

While coffee faces stiff competition from other categories such as energy drinks and tea, sales continue to grow. Some subcategories, such as the single cup segment, have shown truly impressive growth in recent years and clearly illustrate that manufacturers can make significant gains, despite a weak economy and low consumer ...

## Consumers and Retail Banking - UK

“As the banking sector continues to digest the details of the ICB report, Mintel's consumer research suggests that the proposed account redirection service is unlikely to have a major impact on the market – the truth is that the very large majority of consumers are actually pretty happy with their ...

## Cordials and Squashes - UK

## Clothing Retailing - France

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## Clothing Retailing - UK

“As the cross channel shopper emerges as a higher spending customer, every retailer must ensure it doesn't compete against itself by making stores and the website equally relevant and compelling and by driving customer traffic in both directions.

## Coffee Houses and Donut Shops - US

Mintel's *Coffeeshouses and Donut Shops—U.S. June 2011* estimates that overall on-premise sales at these establishments in the U.S. hit \$25.5 billion in 2011, a 4.4% gain over 2010. Throughout 2011, some leading companies reported gains in part as a result of widespread changes that have been ...

## Cooking Enthusiasts - US

An enduring impact of the recession and its aftermath, Americans continue to prioritize home cooking and other home-based activities as a means of economizing. But while the need to save money is a powerful and pervasive motivator for many, other factors are also at play. This report helps to clarify ...

## Dairy Drinks, Milk and Cream - Europe

“In order not to be left behind again if and when the economy recovers and starts to grow, the squash/cordials market needs to be more proactive in anticipating and modifying its product to synthesise with consumer trends.”

## 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 ...

## Fast Casual Restaurants - US

Mintel's exclusive consumer research finds that fast casual restaurants have a modest reach with 55% of respondents visiting a fast casual restaurant in the past month. Frequency of use proves to be steady, averaging 6.18 monthly visits or 1.5 times per week. Notably, availability of fast casual restaurants ...

## Hair Styling Products - Europe

“While many beauty and personal care sectors have benefited from the recession, as they offer a relatively inexpensive way for women to treat themselves, hair styling products do not fall within this category and sales have struggled. Innovation in products that can repair and protect the hair from environmental damage ...

## Holiday Centres - UK

“Holiday centres' family appeal ensures that people with children are particularly likely to consider them when choosing a holiday. However, opportunities exist in targeting demographic groups whose interest is less likely, particularly the growing singles and older populations of the UK.”

## Home Furniture - US

The effects of the recession and the negative impact on the U.S. housing market caused home furniture sales to

“The European dairy drinks markets are always at risk of descending into commodity status. Health concerns over whole milk have made semi-skimmed milk the dominant product, one which lends itself perfectly to generic own-brands. Volume sales, in particular, need to be increased among elderly consumers; who are increasingly aware of ...

## Fashion for the Over-55s - UK

“As the UK is getting older, the over-55s are becoming an increasingly powerful demographic, hence, understanding their attitudes and responding to their needs will be key to unlocking their sizeable value in the fashion industry. Many over-55s are hungry for more stylish fashion options for their age group. It is ...

## Hair Colourants - Europe

The austere economic setting had an adverse effect on European value sales of hair colours, with France, Germany and Italy all posting a decline in 2010. Spain managed only modest growth, but the UK market bucked the downward trend and posted dynamic growth of 7%. Germany remains by far the ...

## Healthcare Catering - UK

“With catering often thought of as low down the list of priorities for hospitals/healthcare trusts, it is telling that there is still a trend towards caterers investing in areas such as ethical ingredients and sustainable sourcing, demonstrating the landscape of how contracts are fought and won, despite restrictive budgets ...

## Holiday Planning and Booking Process - UK

“Austerity and rising costs could encourage a shift away from purely price-driven commoditisation towards a stronger emphasis on quality. In other sectors, such as clothing for example, consumers are buying less but buying 'quality to last'. This can also be an effective marketing approach for holidays – 'less is more ...

## Home Insurance - UK

“After making successful inroads into the personal motor sector, price comparison sites are turning their

decline significantly in 2008 and 2009 (the primary recession years) with many consumers postponing furniture purchases. A rebound was seen in this sector with growth in 2010 and 2011 due ...

## **In-Car Electronics: Entertainment and Navigation - US**

This report explores the in-car electronics and entertainment market in the U.S. The report provides insight into the different factors which influence sales of automotive in-car electronics, navigation, safety, and security products and systems. It will also explore factors influencing trends in consumption and how different marketing campaigns and ...

## **Live Entertainment - US**

This report provides an in-depth examination of the live entertainment market (excluding sports) and is geared towards industry promoters, venue operators, artist managers, live event marketers and anyone interested in pursuing opportunities within this industry. The report explores current trends and innovative ideas in the live entertainment market, and also ...

## **Marketing Health to Men - US**

Marketing health to men is not always an easy endeavor, as men are far less likely than women to regularly visit their doctor, report illnesses or buy health products. However, as the population of men aged 55+ continues to grow over the next five years, the need for quality health ...

## **Media Usage and Online Behavior - US**

In the context of a rapidly changing, fast-evolving digital landscape, media usage is in a period of major transformation. While use of more traditional media (broadcast TV, radio) and communication devices (landlines) remains widespread, a wide range of consumers are embracing new technologies that give them greater access, flexibility and ...

## **Natural and Organic Food and Beverage: The Market - US**

attention to home insurance. This is leading to a growing proportion of household business being written through aggregator sites, to the detriment of direct sales.”

## **Life and Protection: Intermediary Focus - UK**

“In recent years, the life and protection markets have been given a boost due to the increasing number of IFAs conducting life insurance, critical illness and income protection business. However, there are contrasting opinions regarding future prospects. On the one hand the RDR is expected to reduce the overall number ...

## **Marketing Health to Asians - US**

Asians are the fastest growing racial minority in the U.S. and the Asian population includes a significantly higher number of high-income households than the norm. Asian Americans are a diverse group of consumers with different tastes and cultural backgrounds, depending on their country of origin or level of acculturation ...

## **Meat, Poultry and Fish - UK**

“There is potential for meat, poultry and seafood to expand consumer repertoires, to compete more aggressively with ready meals and to secure long-term value growth through innovation. However, companies are operating in a very different market environment than five years ago – innovation cannot lose sight of value for money ...

## **Men's Grooming and Shaving Products - UK**

“The over-45s are low volume users of male grooming products. With the ageing of the UK’s population, more men need to be encouraged to maintain their grooming routines as they age and pass retirement age. Anti-ageing products that are marketed using well known personalities that older men can relate to ...

## **Online Banking - Ireland**

The \$18.9 billion natural and organic food and beverage (NOFB) market is one of the few bright spots in a generally dreary consumer economy. Strong opportunities for innovation and growth remain in this market, even as the food industry as a whole is struggling. This report examines how the ...

## Online Gaming and Betting - UK

“The growth of online leisure, the move into the mainstream of gambling in general and the increasing role web-based technology plays in our everyday lives have enabled internet gaming and betting to grow at a rapid pace over the last five years.

## Organic Food - UK

“The organic market too needs to engage with people’s emotions rather than their vague ideas about whether pesticides are harmful or not, by clearly communicating tangible benefits. Happily, this is what the Organic Trade Board is looking to do with its Why I Love Organic campaign.”

## Pay TV - US

Consumers desire to cut costs in a struggling economy, in addition to the expansion of free and lower-cost content options, present challenges to the \$100 billion pay TV industry, and fears of cord-cutting abound. As new technologies develop, consumers continue to shift or cancel subscriptions, spelling a slowdown in revenue ...

## Retirement Planning - US

The retirement planning industry is in a state of flux. For the past several years, much of the focus has been on Baby Boomers and helping them save enough to retire. Now that they are beginning to retire, the Baby Boomer focus is less on accumulation than it is on ...

## Shaving and Hair Removal - US

Online banking is now firmly established as a mainstream channel within financial services. Around a third of all Irish consumers use online banking services with some degree of regularity, while around a fifth use online banking once a week or more often.

## Online Social Networking - Ireland

In response to increasing demand for data concerning the dynamic economy and growth markets of Northern Ireland and The Republic of Ireland, Mintel has developed a series of reports covering a wide variety of sectors within both of these dynamic regions. Each one provides detailed coverage of key drivers as ...

## OTC External Analgesics - US

Category sales for OTC external analgesics have recovered to pre-recession levels, and a number of factors are in place to drive greater growth: an aging population, rising arthritis rates, trends in self-care, and more. This is a time of considerable opportunity, and this report explores the growth in this market ...

## Property and Casualty Insurance - US

Property & Casualty Insurance–US–October 2011 focuses on the industry’s reaction to an increasingly price-driven and competitive market. The shifts in market share between the more traditional insurers and those focused on price advantages are discussed, as is the move away from agency writers to direct writers as more customers use ...

## Share Dealing - UK

“Some of the most successful investors in recent years have been women yet in the UK sharedealing account ownership among women is significantly behind that of men. Providers have an opportunity to narrow this gap by giving women investors a higher profile in promotional campaigns and also placing more emphasis ...

## Smoothies - UK

Estimated at nearly \$2.1 billion in 2011, the FDMx shaving and hair removal market has been moderately impacted by the economic downturn, and is expected to post an inflation-adjusted gain of 1% from 2006-11. Because the market consists of products that people will always need or want to use ...

## Spa Tourism - International

Modern spa tourism has evolved globally, from the first small businesses of the 1980s and 1990s into one of the world's largest (and youngest) leisure industries, augmented by the formation of its trade body, the International Spa Association (ISPA) in 1991. ISPA's mission is to advance the spa industry by ...

## Sun Protection and Sunless Tanners - US

The U.S. sun protection and sunless tanner market sold through food, drug, and mass stores (not including Walmart) continues to benefit from an increasingly educated and aware consumer public that seeks to avoid damaging UVA/UVB rays that cause melanoma and skin aging. While sunscreen and suntan lotions have ...

## Third Level Education (Industrial Report) - Ireland

The third-level education sector in Ireland has been undergoing a period of intense fluctuation over the past five years, due to the introduction of "top-up" fees in NI, the continuing effects of the recession, and the associated financial and socio-economic effects of the economic downturn since that time. Further uncertainty ...

## Video Game Consoles and Peripherals - UK

"There is no doubt that a strong software offering aimed at traditional audiences for the PlayStation 3 and the Xbox 360, utilising the PlayStation Move and the Kinect, will eventually be successful. However as well as producing software aligned to their own demographics, both Sony and Microsoft could potentially gather ...

## Vitamins and Supplements - Europe

"More should be done to market the portability of smoothies, being more easily transported than fresh fruit and veg and easier to consume while on the go. This would help to increase out-of-home consumption from the relatively low 41% of consumers who drink smoothies on the go."

## Sugar and Gum Confectionery - Europe

A few factors – such as the well-established healthy eating trend, aiming to reduce childhood obesity, and an ageing population – hamper further development in the review markets. Western European countries (excluding the UK and Turkey) declined by around 7% over the 2005-10 period, while gum confectionery rose by 8 ...

## Television Viewing Habits - UK

"Innovations in technology and digital media are changing the way we consume television. We may soon be saying goodbye to the traditional TV guide, made up of a scrolling timeline, and instead welcoming a personalised guide populated with our favourites and recommendations, so that we can watch the shows that ...

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## Visitor Attractions - UK

"The continued pressure on household incomes, driven by the combination of flat earnings and rising food, petrol and utility prices, could result in consumers having less money to spend on leisure generally, and this could impact on the attractions industry, particularly the sectors which target families and young people."

## Wine - US



The vitamins and supplements market has traditionally benefited from consumers' growing interest in self-diagnosis and self-medication of ailments and in looking after their health to prevent illness. This includes taking dietary supplements to ensure they are getting all the nutrients they need.

In 2011, the wine market exhibited small growth of 0.9%. The market has experienced a slowdown in growth since 2006, which could be attributed to the recession where wine has suffered in on-premise channels. In contrast, domestic wine has fared well as the "buy local" trend becomes more popular ...

## **Women's Attitudes Towards Hosiery and Shapewear - US**

Hosiery and shapewear are viewed differently by women. Hosiery has been around for decades and has formerly been considered a staple of women's attire. However, as society has become more casual and fashion trends have changed, hosiery usage has declined and suffers from a perception that, not only is hosiery ...