

## November 2010

### Affluent Investing and Banking - UK

This report provides an overview of the key developments in the affluent banking and investing industry. In addition to quantifying the size of the target wealth market, the report highlights the key economic and regulatory issues impacting the wider wealth management industry. The market size sections provide a detailed account ...

### Barbecue Foods - UK

Two in three adults ate food cooked on the barbecue in summer 2010, with some 120 million barbecue occasions fuelling estimated sales of barbecue foods of some £1.7 billion in 2010. The market has posted healthy growth in recent years, helped by better weather, still a key driver of ...

### Bottled Sauces - UK

This report examines the UK retail market for ready-to-eat bottled sauces. These are generally added to a meal at the table as an accompaniment, although they can also be used as an ingredient in cooking. The market can be segmented into table sauces and dish-specific sauces.

### Call Centres (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 ...

### Christmas Drinking - UK

- Christmas is the perfect time for brands to attract 18-34 year-old drinkers. For example, over half (53%) of this age group who are Christmas drink buyers try something outside of their usual repertoire of drinks during the festive period.

### Air Fresheners - US

Sales of air fresheners are on the decline, and Mintel finds that this downward trend is not solely the result of the economic downturn. Air care products outside of the freshener market are becoming increasingly competitive, in addition to widespread negative perceptions among consumers about the product category. This report ...

### Beer: The Consumer - US

In this report, part one of a two-part report on US beer, Mintel takes an in-depth consumer-centric view of the market. The market-centric view is covered in Mintel's Beer: The Market—U.S., December 2010. This report provides brewers and marketers with a glimpse into not only the consumption trends, but ...

### Breakfast Entrees and Sandwiches - US

The market for frozen and refrigerated breakfast entrées and sandwiches showed impressive growth in 2006, but the rate of growth decelerated in 2007 and then again in 2008 and 2009, as recession gripped the nation. Like many other sectors, this is a category that is faced with the challenge of ...

### Cereal, Energy and Snack Bars - Europe

Value sales of cereal, energy and snack bars reported double-digit growth in the review countries between 2005 and 2009, with the exception of Germany. However, growth slowed down in recent years and is expected to remain as such during the forecast period (2010-14).

### Clothing Retailing - Europe

- The European clothing market was worth an estimated €301.4 billion (including VAT) in 2009.
- Compared to 2008, spending on clothing declined by 4% in 2009.

- Alcohol manufacturers have an opportunity to help make people good hosts ...

- As a discretionary area of spend, it comes as little surprise that clothing has been heavily impacted by the recessionary climate across Europe. Nevertheless ...

## Clothing Retailing - France

- The French population is aging, and is seeking good quality as they seek to make their clothes last and good value as they don't tend to spend a lot on clothes.
- The French economy emerged from recession in 2009 and is on its way to recovery. The Government forecasts growth ...

## Clothing Retailing - Germany

- The population is ageing, but there is a growing segment of the population which aspires to younger fashion.
- The economy is recovering, but consumers are being held back by the recent austerity measures.
- Historically, Germans have shown a lack of interest in clothing and clothing retailers' share of all retail ...

## Clothing Retailing - Italy

- Economic contraction began in the second quarter of 2008. Positive growth returned in the third quarter of 2009, but GDP still declined by 5.0% for the full year.
- The recovery is forecast to be slow, with GDP growth of around 1% forecast for 2010 and 2011 with only a ...

## Clothing Retailing - Spain

- Spain is emerging from a deep recession. Given the problems of its housing industry, the recovery will be very slow.
- The prospects for spending on clothing are therefore poor. 2010 should mark the low point, but we do not expect clothing specialists sales to exceed those of 2007 until 2015 ...

## Computer Software - UK

The reliance of consumers nowadays on all things digital means that new technology is increasingly more sophisticated. This evolution continues to create opportunities for software developers, from tools that enable users to edit photos to software that allows easy management of their digital lives and beyond.

## Construction (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 ...

## Cookies and Cookie Bars - US

With annual sales of more than \$6 billion and some of the world's biggest manufacturers, including Kraft and Kellogg's as major players, the category has the potential to be at the forefront of how companies engage their target audiences through traditional and emerging media.

## Cruises - US

The cruise industry appears to be somewhat more resilient to recessionary pressures than some other segments of the travel industry, such as the lodging sector. However, like many other industries, some companies reported significant declines in 2008 and 2009 but performance is improving in 2010.

## Dairy Drinks (Yogurt, Milk, Smoothies) - Europe

## Dairy Market - Is Functional Still a Driving Force? - Ireland



## European FMCG reports - now new and improved!

## Dieting and Weight Control Foods - UK

- Low fat/calorie foods with added health benefits would appeal to the over 45 year olds who form the core of the weight control foods market. These consumers are more likely to be looking to change their diet to improve their health.
- As men are more likely to agree that ...

## Domestic Central Heating (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 ...

## 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 ...

## Food Retailing - Europe

This report series covers the 19 leading economies of Western Europe. In total these countries account for around 98% of all European retail sales, excluding Russia. The remaining ten countries are either too small (eg Luxembourg) or are not sufficiently well developed to warrant detailed coverage (eg Romania and Bulgaria ...

## Food Retailing - Germany

The Irish dairy market has proved more robust than other food categories in the recession, growing by 4% in value sales over the last five years to reach an estimated €1.4 billion in 2010, despite the impact of heavy promotional activity and trading down over 2009 into 2010.

## Dishwashing Detergents - UK

The market for dishwashing products includes two main kinds of products: detergents for hand dishwashing; and detergents for automatic dishwashers. Over 2005-10 the total market grew by 24% to reach £460 million. Market growth has been driven by new product development and premiumisation in dishwashing detergents, particularly dishwasher tablets. As ...

## Email and Online Marketing in Financial Services - US

In the consumer survey for this report, it is learned that over half of all adults 18+ who have access to the internet have either shopped for or purchased a financial product within the past year. Products likely to have been purchased are auto insurance, homeowners insurance, credit cards, checking ...

## Family Midscale - US

The restaurant industry has felt the impact of the recession and the family midscale segment is no exception. With competition coming from all angles, industry operators are walking the tightrope between health and indulgence, while attempting to diversify the core consumer base and drive home the price:quality ratio message.

## Food Retailing - France

- The French economy emerged from recession in 2009 and is well on its way to recovery. The government forecasts growth of around 1.5% in 2010 and between 1% and 2% in 2011.
- Spending on food has remained robust throughout the economic crisis. Spend in 2008 was boosted by inflation ...

## Food Retailing - Italy

- The economy is recovering, but consumers are being held back by the recent austerity measures.
- This will delay any resurgence in retail sales till 2012 at the earliest, when consumers may finally feel confident enough to trade up again.
- The grocers will drive growth in food retailers' sales going forwards ...

## Food Retailing - Spain

- The consensus economic forecast is for a further small decline in GDP in 2010 and only a marginal increase in 2011.
- The retail trade will remain subdued in the short term because of high unemployment, high personal indebtedness and an oversupplied housing market.
- However we estimate that all retail sales ...

## Football Business - UK

This report tracks recent changes in the way consumers follow football and the attitudes they hold towards it, and considers these in the context of wider trends in the game and UK society. In so doing, it examines the hypothesis that "England's continuing failure in international football is as big ...

## Fruit Juice and Juice Drinks - UK

The fruit juice and juice drinks market is valued at £3.1 billion in 2009 and, while both volumes and values have grown in recent years, the category has been hit by consumers trading down and a reduction in investment in both advertising and innovation. The juice drinks sub-sector has ...

## Holidays to Turkey & Egypt - The Rise of the 'Far Near' - UK

This report analyses market trends and consumer attitudes towards holidays in Turkey and Egypt, investigating the core market factors, strengths and weaknesses, key players and products in the industry.

## Impact of User-Generated Content on Media - UK

- Economic recovery in Italy is forecast to be slow, with GDP growth of around 1% expected for 2010 and 2011 with only a small increase in growth thereafter.
- Austerity measures, coupled with rising unemployment, are likely to continue to put pressure on consumer spending over the next few years, although ...

## Food Retailing - UK

2009 was a relatively quiet year for the major food retailers, insofar as any year could be said to be so for companies that are so large and so dominant not just in their own sector, but in UK retailing as a whole. After the campaign of vilification in the ...

## Footwear - US

The footwear market reached a total of \$46.5 billion in estimated sales for 2010, showing a seemingly surprising increase in sales in spite of the continuing economic crisis in the U.S. Mintel's research reveals how the footwear market has withstood some of the impact of a recession that ...

## Historic and Cultural Visitor Attractions - UK

Following a relatively robust performance during 2008-10, the historic and cultural visitor attractions industry is beginning to feel the impact of the government's Comprehensive Spending Review. There are now concerns about survival and how budget cuts will impact on investment in products and services, and on the overall quality of ...

## Hotels - UK

This report examines hotel use in the UK, considering business, leisure and VFR (visiting friends and relatives) purposes. It considers both full-service and budget hotels, looking at the impact of recession, the state of the market in 2010 and the prospects for the future. It examines who the key customers ...

## In-store Catering - UK

This report examines the impact of user-generated content (UGC) on media, including not just traditional media such as the press but also how it has influenced the digital space in the form of comments, reviews, blogs, forums, social media and other related content.

## India Outbound - India

India is one of the world's fastest-growing economies, home to 1.1 billion people and a youthful population. Since the start of the 1990s, economic reform and market liberalisation has spearheaded change in India, creating new jobs and driving per-capita income upwards. India's service sector has developed rapidly and as ...

## Legacy of Mega Events in Tourism - International

Today, mega events have become a truly global phenomenon. With international communications operating at a level of sophistication never seen before, these events have the potential to reach (and be followed in) most countries around the world.

## London Effect (The) - UK

With 12% of the UK's population living in Greater London, this report examines whether people living in London are happier, more content and more likely to interact with their local surroundings to a greater degree than people from elsewhere in the UK, and indeed whether there is a *London Effect* ...

## Men's Fragrances - US

The U.S. men's fragrance market sold through food, drug, and mass channels excluding Walmart (FDMx) has been in steady decline since 2007, and shows no signs of reviving as long as the economy continues to stagnate. This poor climate has likely led nearly half of men surveyed by Mintel ...

## Online and Mobile Banking - US

Online banking is now firmly entrenched as the preferred banking channel for American consumers.

Increasing emphasis is being placed on in-store catering, both as a revenue stream and as a footfall driver. For example, bookstore retailer Waterstone's has increased the floor space dedicated to catering in order to help build its reputation as a destination leisure venue; this has in part been motivated by ...

## Jeans - Consumer Attitudes to Buying and Wearing - UK

This report looks at consumer attitudes towards buying and wearing jeans (excluding denim skirts and shorts). Mintel estimates a market size for 2010, based on TGI data of consumer purchasing and average amount spent, but due to lack of consensus among the trade, trend data and forecasts are not provided.

## Leisure and Entertainment Preferences of Young Hispanic Adults - US

Impacted by the recession there has been a slowdown in household entertainment spending over the last two years. However, Hispanics remain one of the fastest growing segments of the population, representing nearly a fifth of the U.S. population aged 18-35, and Hispanic interests in entertainment and leisure are an ...

## Marketing to Kids - US

Kids 6-11 are a diverse group: some are still very much children, while others are on the threshold of their teenage years. Some are starting to wrestle with issues of self-esteem, while others are still content to watch their favorite television shows and play with their toys. Some want fame ...

## Men's Grooming - Europe

The €5bn market for dedicated male grooming products has achieved a great deal in a relatively short time. The industry's greatest achievement, arguably, has been to convince younger men that they need their own C&Ts; and that it is now permissible – even stylish – to take an interest in ...

## OTC Pediatrics - US

With the exception of a sales boost in 2009 motivated by the H1N1 flu pandemic, the children's over-the-counter



About 80% of U.S. consumers use online banking, and about half of them pay their bills online. This report looks at the growth of online banking, how consumers use the service, and features that they ...

## Portable Media Players - UK

This report examines strategies and methods for PMPs to stay relevant in the coming smartphone era. It explores how companies can broaden the appeal of PMPs to reach audiences outside the core market of 16-25s. It examines the impact of Apple's iPod product range on the overall market, and assesses ...

## Red Meat - US

With total U.S. sales of \$71.9 billion estimated in 2010, red meat sales have grown 15% since 2005; however, the industry experienced its first single-year decline from 2009-10. In this report, Mintel presents sales trends of red meat, including performance by company and brand, as well as by ...

## Retail Banking Overview - UK

This report focuses on consumers' views of the retail banking market, and highlights the role that the current account plays in people's financial life. The importance of cross-selling is confirmed, and the opportunities for expanding these sales are assessed. Drawing on exclusive consumer research, as well as findings from other ...

## Schoolwear - UK

The schoolwear market has been gradually changing as a result of the rising influence of the main supermarket chains, which has led to the price of school uniform garments falling to an all-time low over the last few years. Aggressive price wars between supermarkets have driven the price of school ...

## Sleep Aids - US

(OTC) remedy market has suffered over the last three years from negative publicity resulting from a steady stream of events, including multiple recalls, a plant closing, and an ongoing inquiry into the ...

## Reaction to the Recession - Changes in Shopping Behaviour - Ireland

The recession, which began in September 2008 in RoI, and some months later in NI, has had a profound impact on Irish consumers' spending and shopping habits. According to consumer data presented in this report, just 29% of NI and 23% of RoI consumers claim that their spending habits have ...

## Refrigerators, Freezers and Dishwashers - US

The market for refrigerators, freezers and dishwashers has seen inflation-adjusted sales fall 4.2% from 2008-2010 as the collapse of the housing market, low consumer confidence and the stagnant renovation market have driven down demand. In 2010, the government Cash for Appliances program did however boost demand for energy-efficient appliances ...

## Savings and Investments Intermediaries - UK

This report explores these issues and examines the impact of changing regulations, technology and market conditions on this sector of the advice market, by drawing on a range of trade, consumer and desk research. The report also presents the findings of Mintel's IFA survey, conducted by NMG.

## Shopping for Childrens Clothing - US

Estimated to be \$43 billion in 2010, the children's clothing market has faced challenges since 2006 due largely to the continuing economic crisis. As the downturn has compelled families to economize and reduce spending on children's clothing, manufacturers and retailers alike have responded with a new approach to enticing consumers ...

## Small Kitchen Appliances - UK

This report explores the market for non-prescription, over-the-counter (OTC) sleep aids. Many Americans have trouble falling asleep or staying asleep. Despite their sleep troubles, however, most Americans have not tried a prescription, OTC or homeopathic sleep aid.

## Suncare Preparations - UK

While the UK's love affair with a tanned appearance continues, with nearly half of consumers believing that a light tan makes them look better and healthier, educational campaigns warning of the risks of sun exposure are having an effect.

## Toilet Care - Europe

Toilet care is a major household cleaning sector, but growth in the more developed European markets is slow. Consumers have less time to clean and less cash to spend on cleaning products. The major current trend is towards more sustainability: 'chemical' cleaning products are widely perceived as bad for the ...

## Travel and Tourism - Finland

Finland is a major exporting country where, economically speaking, tourism takes a back seat to forestry and the high-tech industry. Nonetheless, in 2009, it attracted 5.6 million international visitors – more or less the same number of people who live in this sparsely populated Nordic nation. Revenues from international ...

## Travel and Tourism - Netherlands

Welcoming around 10 million international tourists every year, the Netherlands is one of Europe's most popular tourist destinations. These overseas arrivals inject around US\$12 billion into the country's economy through direct sales. Domestic tourism also plays an important role in the country's tourism industry, with many Dutch citizens making ...

## Travel and Tourism - Sweden

The household goods sector was hit hard by the economic downturn and recession, but small kitchen appliances have outperformed the sector, with sales holding up well in 2009 and showing significant value growth during 2010. Small kitchen appliances have benefited from being more affordable than big-ticket household items, as well ...

## Sweet and Savoury Spreads - Europe

This market is a relatively stable one, even recession-proof, as sweet spreads are a great comfort food. Sales depend a lot on sales of bread, and the latter market is mature. However, suppliers seek to convince consumers of other usages, not just on bread, especially as breakfast declines in popularity.

## Travel and Tourism - Denmark

In the past decade, Denmark has seen the number of tourists entering the country fall gradually, as competition from other destinations drew visitors from its three prime international source markets – Germany, Sweden and Norway – away. Its reputation for being prohibitively expensive also continues to deter a fair number ...

## Travel and Tourism - Iceland

Country Reports are tourism profiles of destination countries.

## Travel and Tourism - Norway

The Kingdom of Norway is one of the Nordic countries located on the western part of the Scandinavian Peninsula. Norway borders the North Sea and the Barents Sea in the west, Russia, Finland and Sweden in the east and the Skagerrak Strait in the south. The country consists of mountains ...

## UK Retail Briefing - UK



While it is yet to rank in the UNWTO's top ten world tourism destinations, this may still be Sweden's moment. Long associated with director Ingmar Bergman, the actresses Greta Garbo and Ingrid Bergman, as well as with political neutrality, in recent years, Sweden has enjoyed unprecedented media attention and visibility ...

## Web Aggregators - UK

This report uses Mintel's exclusively commissioned consumer research to provide an insight into aggregator usage, the approach taken to online research and purchasing, aggregator purchasing considerations and general attitudes towards aggregators. The sector's key players are considered in terms of both recent activity and also a wider brand analysis. Broader ...

## Wireless Connectivity Inside Cars - US

This report explores the wireless information and entertainment platforms inside vehicles. It provides insight into the external and internal factors affecting their development and what they mean for future sales, promotional campaigns and industry innovations. Specific questions that are answered in this report include, but are not limited to, the ...

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## Whole of Life Insurance - UK

**Report findings:**