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**Bottled Water**  
U.S. consumer intelligence, December 2003

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Shaw’s Supermarkets: Shaw’s Signature Sparkling Beverages
Leading Brands: Soy2O Fruit-flavored Water and Natural Soy Isoflavones
Wal-Mart: Kid Connection Purified Drinking Water
Safeway: Safeway Select Clear Strawberry & Kiwi Sparkling Water
Suntory Water Group: Hinckley Springs Spring Water with Fluoride
Ferolito Vultaggio & Sons: AriZona Infused Water
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INTRODUCTION

The market for bottled water has enjoyed strong growth of 81% over the review period of 1998-2003, but increasing competition and consolidation are the two biggest trends in the industry now. This in turn has caused prices to drop as branded waters try to compete with private label bottled water. Single-serving PET bottles are the fastest growing segment in the industry since bulk water sales have fallen as consumers favor the more portable PET. The industry will continue to grow as bottled water becomes even more readily available through increased distribution channels and as suppliers introduce new value-added waters including fitness and flavored waters.

The trend toward healthy eating and participation in fitness is driving bottled water sales, especially the PET segment. This trend is expected to continue to drive bottled water sales through 2008.

DATE OF LAST REPORT

This is an update of Mintel’s previous report on the bottled water market—Bottled Water—U.S., consumer intelligence, November 2001.

A number of U.S. consumer intelligence reports covering other related sectors have been published or are in preparation, including the following:

- Smoothies—U.S., consumer intelligence, February 2004
- Coffee—U.S., consumer intelligence, January 2004
- Non-carbonated Drinks—U.S., consumer intelligence, January 2004
- Water Filtration & Purification—U.S., consumer intelligence, December 2003
- Vending—U.S., consumer intelligence, December 2003
- Hispanic Drinks—U.S., consumer intelligence, September 2003
- Store Brand Drinks—U.S., consumer intelligence, October 2003
- Functional Beverages—U.S., consumer intelligence, September 2003
- Energy Drinks—U.S., consumer intelligence, July 2003
- Tea—U.S., consumer intelligence, June 2003
- Milk—U.S., consumer intelligence, April 2003
- Fruit Juice & Juice Drinks—U.S., consumer intelligence, February 2003
- Breakfast Drinks—U.S., consumer intelligence, November 2002
- Sports Drinks—U.S., consumer intelligence, July 2002

In addition, Mintel has published a number of reports on the UK market that may be of interest:
DEFINITION

For the purposes of this report, Mintel covers the U.S. market for bottled water as defined by the International Bottled Water Association (IBWA). The IBWA defines bottled water as water sealed in a sanitary container, to be sold for human consumption. Flavored carbonated and non-carbonated waters are included.

The following products are excluded from this report:

- seltzer
- tonic
- club soda.

There are several types of bottled water, depending on the source. In the U.S., approximately 75% of bottled water comes from protected springs or wells, with the remaining 25% derived from public water supplies that meet federal and state requirements of the 1974 Safe Drinking Water Act.

According to the Food and Drug Administration (FDA), for bottled water to be labeled as such, bottlers must meet the following standards:

Artesian water:
- from a well in a confined aquifer
- water level in well must stand at some height above the top of the aquifer
- may also be known as “artesian well water”

Fluoridated water:
- contains fluoride that is added within the limitations set by Federal Regulations
- some spring and artesian sources have trace amounts of naturally occurring fluoride

Mineral water:
- must contain no less than 250 parts per million (ppm) total dissolved solids (TDS) with the solids being the minerals in the water
- must come from a geologically and physically protected underground water source
is distinguishable from other types of water by the regular mineral and trace elements present
no minerals may be added to this water

Purified water:
- produced by distillation, deionization, reverse osmosis or other suitable processes that meet the legal definition of “purified water”
- may also be known as “demineralized water”.

Sparkling water:
- contains, after treatment and possible replacement of carbon dioxide, the same amount of carbon dioxide that it had at emergence from the source

Spring water:
- must come from underground formation and flow naturally to the surface of the earth
- emanates from beneath the earth, from under strata that formed in prehistoric times

Sterile water:
- must meet the requirements under “Sterility Tests” in the U.S. Pharmacopeia
- may also be known as “sterilized water.”

Well water:
- comes from a hole that is bored, drilled or otherwise constructed in the ground, tapping the water of an aquifer

Not included in this report are the following:

- water sold from bulk dispensers or coolers; and
- home or office water delivery.

Value figures throughout this report are at retail selling prices (rsp) excluding sales tax unless otherwise stated.

ABBREVIATIONS & TERMS

Abbreviations

There follows a list of abbreviations used in this report

<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABC</td>
<td>American Broadcasting Company</td>
</tr>
<tr>
<td>ACC</td>
<td>Atlantic Coast Conference</td>
</tr>
<tr>
<td>AVP</td>
<td>Association of Volleyball Professionals</td>
</tr>
<tr>
<td>CD</td>
<td>Compact disc</td>
</tr>
<tr>
<td>CIF</td>
<td>Cost, Insurance, Freight</td>
</tr>
<tr>
<td>CPI</td>
<td>Consumer Price Index</td>
</tr>
<tr>
<td>DVD</td>
<td>Digital versatile disc</td>
</tr>
</tbody>
</table>

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Introduction & Abbreviations

Bottled Water
U.S. consumer intelligence, December 2003

<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>DWNA</td>
<td>Danone Waters North America</td>
</tr>
<tr>
<td>EPA</td>
<td>U.S. Environmental Protection Agency</td>
</tr>
<tr>
<td>ESPN</td>
<td>Entertainment and Sports Programming Network</td>
</tr>
<tr>
<td>FAS</td>
<td>Free Alongside Ship</td>
</tr>
<tr>
<td>FDA</td>
<td>U.S. Food and Drug Administration</td>
</tr>
<tr>
<td>FDM</td>
<td>Food, drug, and mass merchandiser</td>
</tr>
<tr>
<td>HOD</td>
<td>Home and Office Delivery</td>
</tr>
<tr>
<td>IBWA</td>
<td>International Bottled Water Association</td>
</tr>
<tr>
<td>ICR</td>
<td>International Communications Research</td>
</tr>
<tr>
<td>IRI</td>
<td>Information Resources Inc</td>
</tr>
<tr>
<td>NCS</td>
<td>National Consumer Survey (Simmons)</td>
</tr>
<tr>
<td>NSDWR</td>
<td>National Secondary Drinking Water Regulations</td>
</tr>
<tr>
<td>PET</td>
<td>Polyethylene terephthalate</td>
</tr>
<tr>
<td>POP</td>
<td>Point of Purchase</td>
</tr>
<tr>
<td>RTD</td>
<td>Ready-to-drink</td>
</tr>
<tr>
<td>SITC</td>
<td>Standard International Trade Classification</td>
</tr>
<tr>
<td>SKU</td>
<td>Stock keeping unit</td>
</tr>
<tr>
<td>SPSS</td>
<td>Statistical Package for the Social Sciences</td>
</tr>
<tr>
<td>TNSMI/CMR</td>
<td>TNS Media Intelligence/Competitive Media Reporting</td>
</tr>
<tr>
<td>UPC</td>
<td>Universal Product Code</td>
</tr>
<tr>
<td>Y2K</td>
<td>Year 2000</td>
</tr>
</tbody>
</table>

Terms

The following terms are also used in the report:

CPI
The Consumer Price Index is a measure of the average change over time in the prices paid by urban consumers for a market basket of consumer goods and services.

The CPI and its components are typically used to adjust other economic series for price changes and to translate these series into inflation-free dollars. Examples of series adjusted by the CPI include retail sales, hourly and weekly earnings, and components of the national income and product accounts. In addition, and in Mintel reports, the CPI is used as a deflator of the value of the consumer’s dollar to find its purchasing power. The purchasing power of the consumer’s dollar measures the change in the value to the consumer of goods and services that a dollar will buy at different dates.

The CPI is generally the best measure for adjusting payments to consumers when the intent is to allow consumers to purchase, at today’s prices, a market basket of goods and services equivalent to one that they could purchase in an earlier period. It is also the best measure to use to translate retail sales into real or inflation-free dollars.
Generations are discussed within this report, and are defined as followed:

- **World War II**: The generation born in 1932 or before. In 2003, members of this generation are aged 71 or older.
- **Swing Generation**: The generation born between 1933 and 1945. In 2003, members of the Swing generation are between the ages of 58 and 70.
- **Baby Boomers**: The generation born between 1946 and 1964. In 2003, Baby Boomers are between the ages of 39 and 57.
- **Generation X**: The generation born between 1965 and 1976. In 2003, Generation Xers are between the ages of 27 and 38.
- **Echo Boom/Millennial**: The generation born between 1977 and 1994. In 2003, Echo Boomers are between the ages of 26 and 9.
- **Post-Millennial**: The generation born from 1994 to the present. In 2003, Post-Millennials are 8 years and younger.
EXECUTIVE SUMMARY

A SWIFTLY GROWING MARKET

The bottled water market has shown significant growth since the mid-1990s and although some slowdown is to be expected as pricing becomes more competitive, growth should continue to be the trend. With sales of just over $4 billion in 1998 and an estimated $7.4 billion in 2003, the market is likely to surpass $8 billion by 2005.

SEGMENTS SHOW VARYING RATES OF GROWTH

The fastest growing segment in the market is the convenient/PET segment with 31% growth between 2001 and 2003. This segment now holds over 80% share of the market. The gains in the market share of the convenient/PET segment have come mainly at the expense of jug/bulk still water, which has shown a decrease in sales of over 4% between 2001 and 2003.

HEALTH CONCERNS & YOUNG ADULTS DRIVE THE MARKET

Factors that are driving sales in the bottled water market include increased knowledge of the benefits of hydration and the recommended eight, 8-oz. glasses per day of water intake. Increased participation in sports and fitness activities has also helped to drive sales of bottled water as participants rehydrate themselves with bottled water in convenient carry-along bottles of water. Teens, in particular, show considerable increases in organized sports participation.

Health, diet, and nutrition

An increase in attention to healthy eating and weight loss and maintenance has helped drive people to bottled water as an alternative to sodas. The American public is considered overweight and obesity has become a severe problem in America, increased consumption of water as part of a healthy diet is now a staple.

The younger consumer

Young adults aged 15-24 are a key demographic group for bottled water suppliers. Teens tend to drink bottled water in a greater numbers than adults and as previous drivers have shown they are also very involved in sports. The segment of the population comprised of 15-24 year olds will grow by over 2 million between 2003 and 2008.

SOFT DRINK MANUFACTURERS LEAD THE MARKET

The most recent entries into the bottled water market are large soft drink companies. PepsiCo and Coca-Cola have claimed the top two brands in the market and their growth has continued to be significant. The combined Nestlé Waters North America brands own a combined 23% share of the market.
MARKET DRIVERS

The Market Drivers section identifies the principal external factors that affect the bottled water market. These factors may have either a positive or negative influence.

THE IMPORTANCE OF HYDRATION

While eight 8-oz. servings of water are recommended daily for good health, few Americans actually drink the recommended amount.

Lack of water consumption can lead to short-term symptoms of dehydration that include dry, itchy skin, or fatigue in the early or mid-day. Longer-term dehydration can affect blood pressure, circulation, kidney function, and digestion.

While concern with hydration has been growing in the U.S., a 2000 study by Yankelovich Partners on behalf of the International Bottled Water Association (IBWA) and the Rockefeller University found that only one in five Americans drinks the recommended eight glasses of water a day.

Figure 1 lists the reasons given for not drinking the recommended amount of water.

Figure 1 Reasons for not drinking daily recommended amount of water, February 2000

<table>
<thead>
<tr>
<th>Reasons given</th>
<th>All %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lack of time/too busy</td>
<td>SAMPLE</td>
</tr>
<tr>
<td>Don’t like the taste</td>
<td>SAMPLE</td>
</tr>
<tr>
<td>Prefer other beverages</td>
<td></td>
</tr>
<tr>
<td>Forget to drink</td>
<td></td>
</tr>
<tr>
<td>Not thirsty</td>
<td></td>
</tr>
<tr>
<td>No bottled water available</td>
<td></td>
</tr>
<tr>
<td>Can’t leave desk for break</td>
<td></td>
</tr>
<tr>
<td>Worry about too many restroom breaks</td>
<td></td>
</tr>
</tbody>
</table>

Source: Yankelovich Partners for International Bottled Water Association and The Rockefeller University, 2000

Over one in five respondents felt that they did not have time to consume the recommended daily amount of water. Bottled water has appeared in such varied places as video rental stores, office supply stores and electronics stores. By expanding distribution and raising consumer awareness regarding the importance of drinking water, manufacturers have the opportunity of meeting consumer need whenever or wherever they remember to drink water.

Some 12% of respondents to the Yankelovich study cite a preference for other beverages as the reason why they do not drink the recommended amount of the water. Data from the Spring 2003
Simmons NCS, presented in Figure 2, details incidence of consumption of some of these competing beverages.

**Figure 2 Consumption of bottled water vs. other selected beverages, June 2002-May 2003**

“Do you drink…?”

Base: 20,802 adults aged 18 and older

<table>
<thead>
<tr>
<th></th>
<th>All %</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Any bottled water (net):</strong></td>
<td></td>
</tr>
<tr>
<td>Non-carbonated bottled spring water</td>
<td>SAMPLE</td>
</tr>
<tr>
<td>Sparkling water/seltzer/natural sodas</td>
<td></td>
</tr>
<tr>
<td><strong>Carbonated beverages (net):</strong></td>
<td></td>
</tr>
<tr>
<td>Regular</td>
<td></td>
</tr>
<tr>
<td>Diet</td>
<td></td>
</tr>
<tr>
<td>Iced tea (ready-to-drink)</td>
<td>SAMPLE</td>
</tr>
<tr>
<td>Thirst quencher and sports/activity drinks</td>
<td></td>
</tr>
<tr>
<td>Energy drinks</td>
<td></td>
</tr>
</tbody>
</table>

Source: Mintel/Spring 2003 Simmons NCS

Carbonated beverages, RTD tea, thirst quenchers and energy drinks all compete with bottled water for consumers’ attention not just outside of home, but for at-home consumption as well. A significantly higher percentage of respondents to the Simmons survey say they drink carbonated beverages than say they drink any type of bottled water.

Though they might be interchangeable in the consumer’s mind, consumption of these other beverages actually increases the need for drinking water. Beverages like soft drinks, coffee, and tea, most of which contain caffeine, actually contribute to dehydration.

While the above are challenges that bottled water suppliers face in reaching new customers, research does indicate that the presence of bottled water in American life is growing. According to the Spring 2003 Simmons NCS, some 63% of adult respondents say they drink bottled water, compared to 56% who said the same in the Spring 2001 survey.

It should be noted that some of the same companies that are now dominating the bottled water market also dominate the carbonated drinks market, namely PepsiCo and Coca-Cola. As these two companies have moved in on the bottled water market, they have applied the same marketing tactics to their products as they have to their more traditional carbonated drinks brands. The implication is that in many respects, bottled water is increasingly being positioned and marketed as a soft drink option, rather than as an alternative to tap water.
MARKET SIZE & TRENDS

MARKET SIZE

Estimated at $7.4 billion in 2003, the bottled water market has nearly doubled since 1998. Figure 7 shows retail sales of bottled water over the complete review period.

Figure 3 Retail sales of bottled water, at current and constant prices, 1998-2003

<table>
<thead>
<tr>
<th>Year</th>
<th>Sales at current prices</th>
<th>Sales at constant 2003 prices*</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$million</td>
<td>Index</td>
</tr>
<tr>
<td>1998</td>
<td>SAMPLE</td>
<td></td>
</tr>
<tr>
<td>1999</td>
<td>SAMPLE</td>
<td></td>
</tr>
<tr>
<td>2000</td>
<td>SAMPLE</td>
<td></td>
</tr>
<tr>
<td>2001</td>
<td>SAMPLE</td>
<td></td>
</tr>
<tr>
<td>2002</td>
<td>SAMPLE</td>
<td></td>
</tr>
<tr>
<td>2003 (est.)</td>
<td>SAMPLE</td>
<td></td>
</tr>
</tbody>
</table>

* adjusted for inflation using the All Items CPI

Source: Based on Information Resources, Inc. Infoscan ® Reviews Information/Beverage Marketing Corporation/Mintel

Graph 1 further details trends in sales of bottled water from 1998-2003.
MARKET SEGMENTATION

OVERVIEW

For the purposes of this report, the bottled water market has been segmented as follows:

- Convenience/PET still water, which includes non-carbonated water for individual consumption
- Jug/bulk still water, 1 gallon or larger bottles of non-carbonated water
- Sparkling/mineral water, includes carbonated waters but not flavored seltzers or tonics.

Sales of individual size PET bottles of water have the highest margin for producers and have shown significant growth in market share in just two years. This growth in market share has come at the expense of the more traditional jugs of bottled water that had in the past been the staple. Figure 9 shows the sales of bottled water by segment.

*Data may not equal totals due to rounding

Source: Based on Information Resources, Inc. Infoscan® Reviews Information/Beverage Marketing Corporation/Mintel

Market share held by each type of product is depicted in Graph 2.
SPARKLING/MINERAL WATER

Sales of sparkling and mineral waters have not seen the significant gains of PET and are not typically subject to momentary spikes that occur with bulk water. Figure 12 shows sales of sparkling/mineral water from 1998-2003.

Figure 5  Sales of sparkling/mineral water, 1998-2003

<table>
<thead>
<tr>
<th>Year</th>
<th>Sales at current prices $million</th>
<th>Index</th>
<th>% change</th>
<th>Sales at constant 2003 prices* $million</th>
<th>Index</th>
<th>% change</th>
</tr>
</thead>
<tbody>
<tr>
<td>1998</td>
<td>SAMPLE</td>
<td></td>
<td></td>
<td>SAMPLE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1999</td>
<td>SAMPLE</td>
<td></td>
<td></td>
<td>SAMPLE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2000</td>
<td>SAMPLE</td>
<td></td>
<td></td>
<td>SAMPLE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2001</td>
<td></td>
<td></td>
<td></td>
<td>SAMPLE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2002</td>
<td></td>
<td></td>
<td></td>
<td>SAMPLE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2003 (est.)</td>
<td>SAMPLE</td>
<td></td>
<td></td>
<td>SAMPLE</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* adjusted for inflation using the All Items CPI

Source: Based on Information Resources, Inc. Infoscan ® Reviews Information/Mintel

While the majority of the years covered by the review period show gains in sales at current prices, examination of constant 2003 prices shows a different story. The year 2001 and 2003 showed the largest gain in sales at current prices, but sales at constant 2003 prices remained below 1998 levels.

The segment has been given as boost, as seen in 2003, by flavored varieties, often introduced by retailers through under their store brand name. Shaw’s and Safeway supermarkets both introduced new flavored sparkling waters in 2003 (see New Product Briefs in the Appendix: New Product Developments).
Supply Structure

SUPPLY STRUCTURE

The supply structure section covers production of bottled water. Manufacturer and brand profiles are included and foreign trade is also covered.

FOREIGN TRADE

For the purposes of this report, Mintel has drawn on the U.S. International Trade Commission, which provides data on foreign trade in the following category:

- Standard International Trade Classification (SITC) 5: 11101 Waters, including natural or artificial mineral waters and aerated waters, not containing added sugar or other sweetening matter; ice and snow.

The U.S. is a net importer of bottled. Exports of bottled water amount to about 10% of the value of imports for 2002. These data are further detailed in the following subsections.

Imports

Figure 13 compares imports of water for 2000 and 2002.

Figure 6       Imports of water, by source country/region, 2000 & 2002

SITC5: 11101

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Customs value $000</td>
<td>Share %</td>
<td>Customs value $000</td>
<td>Share %</td>
<td></td>
</tr>
<tr>
<td>Canada</td>
<td>SAMPLE</td>
<td></td>
<td>SAMPLE</td>
<td></td>
<td>SAMPLE</td>
</tr>
<tr>
<td>France</td>
<td>SAMPLE</td>
<td></td>
<td>SAMPLE</td>
<td></td>
<td></td>
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<tr>
<td>Italy</td>
<td>SAMPLE</td>
<td></td>
<td>SAMPLE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fiji</td>
<td>SAMPLE</td>
<td></td>
<td>SAMPLE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mexico</td>
<td>SAMPLE</td>
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<td>SAMPLE</td>
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<tr>
<td>Germany</td>
<td>SAMPLE</td>
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<td>SAMPLE</td>
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</tr>
<tr>
<td>Norway</td>
<td>SAMPLE</td>
<td></td>
<td>SAMPLE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>United Kingdom</td>
<td>SAMPLE</td>
<td></td>
<td>SAMPLE</td>
<td></td>
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<tr>
<td>Portugal</td>
<td>SAMPLE</td>
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<td>SAMPLE</td>
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<td>Poland</td>
<td>SAMPLE</td>
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<td>SAMPLE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>New Zealand</td>
<td>SAMPLE</td>
<td></td>
<td>SAMPLE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Iceland</td>
<td>SAMPLE</td>
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<td>SAMPLE</td>
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<td></td>
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<tr>
<td>Georgia</td>
<td>SAMPLE</td>
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<td>SAMPLE</td>
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<td></td>
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<tr>
<td>Slovenia</td>
<td>SAMPLE</td>
<td></td>
<td>SAMPLE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Belgium</td>
<td>SAMPLE</td>
<td></td>
<td>SAMPLE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>All other</td>
<td>SAMPLE</td>
<td></td>
<td>SAMPLE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td></td>
<td>SAMPLE</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: U.S. International Trade Commission DataWeb/Mintel
Supply Structure

France’s share of U.S. imports has decreased in the early 2000s, while others such as Canada, Italy, and Fiji continue to increase imports to the U.S. This trend away from French bottled water imports may have been exacerbated by two factors:

1. backlash toward French products due to political events surrounding the U.S. invasion of Iraq, and
2. new competitive products from other countries that compete with Evian and Perrier.

While France was one of the first players in the bottled water market, the lure of the booming market has drawn other countries into the fray.

Exports

Exports of water rose slightly over the period, as shown in Figure 14.

**Figure 7 Exports of water, by destination country/region, 2000 & 2002**

<table>
<thead>
<tr>
<th>SITC5: 11101</th>
<th>2000 FAS value $000</th>
<th>Share %</th>
<th>2002 FAS value $000</th>
<th>Share %</th>
<th>Change 2000-2002 %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canada</td>
<td>SAMPLE</td>
<td></td>
<td>Japan</td>
<td>SAMPLE</td>
<td></td>
</tr>
<tr>
<td>Mexico</td>
<td></td>
<td></td>
<td>Taiwan</td>
<td>SAMPLE</td>
<td></td>
</tr>
<tr>
<td>United Kingdom</td>
<td></td>
<td></td>
<td>Bahamas</td>
<td>SAMPLE</td>
<td></td>
</tr>
<tr>
<td>Bahamas</td>
<td>SAMPLE</td>
<td></td>
<td>Cayman Islands</td>
<td>SAMPLE</td>
<td></td>
</tr>
<tr>
<td>Jamaica</td>
<td></td>
<td></td>
<td>Jamaica</td>
<td>SAMPLE</td>
<td></td>
</tr>
<tr>
<td>Thailand</td>
<td>SAMPLE</td>
<td></td>
<td>Hong Kong</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Trinidad &amp; Tobago</td>
<td></td>
<td></td>
<td>Australia</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Australia</td>
<td></td>
<td></td>
<td>Belgium</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Belgium</td>
<td></td>
<td></td>
<td>Barbados</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Barbados</td>
<td></td>
<td></td>
<td>Cyprus</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cyprus</td>
<td></td>
<td></td>
<td>All other</td>
<td>SAMPLE</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>SAMPLE</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: U.S. International Trade Commission DataWeb/Mintel

Not only is Canada the greatest source of bottled water imports, but the country is also the largest recipient of U.S. water.
ADVERTISING & PROMOTION

INTRODUCTION

The extraordinary increase in sales of bottled water over the review period has come with only a minimal amount of advertising. As consolidation increases and the major players cement their position in the industry, advertising dollars have increased as well. The competition in the bottled water market is driving companies to differentiate their products from those of competitors.

There are basically two overarching themes in the quest to sell bottled water: health and purity, or excitement and youth. While the health approach may appeal to all ages and waters of all price points, ads featuring excitement and youth are targeted to both a younger demographic, but are trying to sell higher-price point waters with brand image (such as Perrier, Evian, or Dasani).

MAJOR COMPANIES AND BRANDS

Following are brief profiles of promotional activity by leading companies in the bottled water market.

Nestlé Waters North America

In July 2003 Nestlé Waters North America signed a marketing agreement with Universal Studios to become the official water of Universal theme parks. The marketing agreement is to run for 10 years and targets families by sponsoring the Shrek 4D attraction. Other campaign components include radio and Internet ads, outdoor ads on Nestlé Waters delivery trucks in Orlando and Los Angeles, and on-package promotions.

In order to distance the Perrier brand from all things French, ads created by Ogilvy & Mather of New York show Perrier bottles in more American situations. The “Perrier in America” campaign has been ongoing since being introduced in 2000. The company’s plan for the product is to seek a newer young, hip demographic and to make Perrier a “lifestyle beverage” while at the same time distancing it from its French roots.

As part of an effort to reach hip, young consumers, Zoom Media launched a 12-week ad campaign for Perrier in summer 2002 by placing ads on 80 backlit billboards located in bars and nightclubs in New York, Miami, and Los Angeles. Targeting club-goers aged 18-34, the ad campaign also utilized 230 washroom billboards.

Danone Waters North America

Danone’s continuing campaign for its Evian brand emphasizes youth through attitude rather than age. In February 2003, an ad from Havas’ EURO RSCG BETC of Paris shows individuals including a pregnant woman, an elderly woman, and a middle-aged business man singing in
RETAIL DISTRIBUTION

Further information on many of the retailers named in this section is available from Mintel’s Retail Interactive database. Data included in Retail Interactive include: 3-year financials, operating statistics, company structure, corporate profile and enable company/company and company/sector comparison and analysis.

The database is available on Mintel’s website http://reports.mintel.com. For more information call the U.S. HelpDesk at 312.943.5250.

OVERVIEW

Bottled water has become increasingly available through a wide variety of distribution channels. Where bottled water had previously been limited to food, drug, mass merchandisers, and convenience stores, channels have now expanded to include sporting and concert events, nightclubs, and almost all soft drink vending machines.


Figure 8 Retail sales of bottled water, by channel, 2001 & 2003

<table>
<thead>
<tr>
<th>Channel</th>
<th>2001 Sales $million</th>
<th>2003 Sales $million</th>
<th>Change 2001-2003 %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supermarkets</td>
<td>SAMPLE</td>
<td>SAMPLE</td>
<td></td>
</tr>
<tr>
<td>Mass merchandisers/warehouse clubs</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Convenience stores/gas stations</td>
<td>SAMPLE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vending</td>
<td></td>
<td>SAMPLE</td>
<td></td>
</tr>
<tr>
<td>Drug stores</td>
<td></td>
<td>SAMPLE</td>
<td></td>
</tr>
<tr>
<td>All other*</td>
<td>SAMPLE</td>
<td>SAMPLE</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* includes restaurants, other retail or entertainment venues not already detailed

Source: Based on Information Resources, Inc. Infoscan ® Reviews Information/Company reports/Beverage Marketing Corporation/Mintel

Sales by retailer type for 2003 are illustrated in Graph 4.
THE CONSUMER

Mintel is able to offer further analysis of its exclusive research, tailored to individual clients’ needs. It is possible, for example, to net and/or combine codes to create new attitudinal, usage or demographic groups, and cross-analysis can show how the answers to any questions or categories are related. For further details and prices, please call the editorial team at 312.932.0400.

INTRODUCTION

For the purposes of this report, Mintel commissioned exclusive consumer research through ICR to explore consumer purchase of and attitudes towards bottled water. Fieldwork was conducted October 30-November 3, 2003, among a nationally representative sample (weighted against the total population for estimation) of 1,018 adults aged 18 and over.

Mintel has also analyzed data from Simmons Research, using the Spring 2003 National Consumer Survey. The NCS survey was carried out from June 2002-May 2003 and the results presented here are based on the sample of 20,802 adults aged 18 and over, with results weighted to represent the U.S. population.

Mintel has also drawn on the Spring 2003 Simmons Teens survey, carried out among a sample of 2,469 teens aged 12-17 from June 2002-May 2003.

Mintel has looked at responses by various demographic factors such as age, race/ethnicity, household income and geographic location to give a consumer perspective and analyze usage and trends. Analysis is only presented where significant differences are apparent.

BOTTLED WATER CONSUMPTION

In order to explore both incidence of consumption and the types of bottled water adults drink, Mintel analyzed data from the Spring 2003 Simmons NCS. Specifically, the Simmons survey asked the following question of respondents:

“Do you drink...?”

The topline results are presented in Figure 31.
FUTURE & FORECAST

FUTURE TRENDS

Demographics

The future looks bright for bottled water. The popularity of bottled water with adults under age 45 is significant because these adults will raise children who are accustomed to having bottled water around the house.

Figure 72 details population projections from 2003-2008.

Figure 9  U.S. population projections, by age, 2003-2008

<table>
<thead>
<tr>
<th></th>
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<tbody>
<tr>
<td></td>
<td>000</td>
<td>%</td>
<td>000</td>
</tr>
<tr>
<td>0-11</td>
<td>SAMPLE</td>
<td>SAMPLE</td>
<td>SAMPLE</td>
</tr>
<tr>
<td>12-17</td>
<td></td>
<td></td>
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<tr>
<td>18-24</td>
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<td>SAMPLE</td>
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<tr>
<td>25-34</td>
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<tr>
<td>35-44</td>
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<td></td>
<td></td>
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<td>45-54</td>
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<td>55-64</td>
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<td>65-74</td>
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<tr>
<td>75+</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: U.S. Census Bureau/Mintel

The expected increase in number of Americans aged 12-24 is good news for the industry. As shown by the Simmons NCS data, young people are most likely to drink bottled water. While the size of the population aged 12-17 will only grow by 1.9%, the number of those aged 18-24 will grow by almost 5% in the same time period. These consumers will have been used to having bottled water available to them either at home or at school, or wherever their social activities take them.

The fastest population growth, however, will occur among those aged 55-64. Though these consumers are less likely to drink bottled water, they may have more luxurious tastes than previous generations of the same age. The key to attracting these consumers is to convince them that bottled water is more than a luxury and to possibly interest them in value-added waters such as vitamin-enhanced or flavored products.

The challenge will be in convincing them to carry home cases of bottled water from retailers. This segment may be more viable for home delivery.
APPENDIX: NEW PRODUCT DEVELOPMENTS

The New Product Developments section of this report is provided by GNPD, a division of Mintel specializing in new product monitoring. Trends and products mentioned here indicate new product activity and may not be indicative of broader market trends. The category review is based on new product activity only and in particular includes information on product activity outside the U.S.

For more information on GNPD contact Mintel at 312.932.0400.

NEW PRODUCT TRENDS

Introduction

Water, during the last few years, has gained substantially in significance. New formats, such as smaller bottles with convenient closure mechanisms for sportsmen, lightly flavored varieties to attract soft drink aficionados and fortified and health oriented variants have done much to help position water as a drink in its own right. While carbonates struggle to maintain consumer interest—largely due to a lack of differentiation, but also because of their unhealthy perception that collides with the growing good-for-you boom—water has successfully managed to adapt to a number of contemporary trends.

New product trends in the bottled water market can be summarized as follows:

- Overall increase in new product activity
- Growth in flavored waters—particularly in the UK
- Near-water drinks with deep-sea water are coming to the fore in Japan
- To-date limited activity in truly functional waters
- Increasing number of beverages with a wellness positioning
- Continuous stream of sports waters
- Growing number of waters that are marketed on an energy platform
- Few “on-the-go” branded waters

This review is an update of the original Water category review published in July 2001.

New product introductions

Figure 77 outlines the number of new bottled water product introductions in the U.S. from 1998 to 2003.
Appendix: Research Methodology

Bottled Water
U.S. consumer intelligence, December 2003

Figure 10  Number of bottled water new product introductions, 1998-2003

<table>
<thead>
<tr>
<th>Year</th>
<th>Bottled water # of introductions</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>1998</td>
<td>SAMPLE</td>
<td></td>
</tr>
<tr>
<td>1999</td>
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<tr>
<td>2000</td>
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<td></td>
</tr>
<tr>
<td>2001</td>
<td>SAMPLE</td>
<td></td>
</tr>
<tr>
<td>2002</td>
<td></td>
<td></td>
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<tr>
<td>2003</td>
<td></td>
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</tbody>
</table>

Note: Numbers include new brands and line extensions, but do not include packaging changes and products flagged as new and improved. Source: Global New Products Database.

The number of new bottled water introductions grew 211% from 1998-2003, with most significant growth occurring in 1999, near the start of bottled water’s rapid growth in popularity in the U.S.

Though Mintel’s report covers only the U.S. market, this category review includes global new product introductions for comparison.

Product trends

Flavored waters

Demand for flavored water has been growing substantially over the last couple of years, accounting for much of the category’s expansion. This is particularly true for the UK market, where a tremendous increase in volume sales was met by a continuously increasing stream of new product development. Other buoyant markets in terms of new product development include France and Belgium, which are all in contrast to North America, where this trend is less pronounced.

Among the most common flavors at the moment are apple, orange, peach and lemon/lime/citrus. Recent examples include:

- Beverage Brands’ Caledonian Clear range of low-calorie, sparkling mineral waters with fruit flavors including apple, strawberry, peach, orange and cherry, introduced into Asian markets including Singapore.
- Sociedade das Aguas de Pisões Moura’s Limão Verde Sparkling Water with a lime flavor in Portugal.
- Fruiteme Fruit Juices’ lemon & lime flavored sparkling mineral water in South Africa.
- Carrefour’s Dia Gaseosa, a carbonated lemon flavored water in Spain.
- Danone’s Salvetat, lemon & lime flavored sparkling water in France.
APPENDIX: RESEARCH METHODOLOGY

Mintel International Group, Ltd is an independent market analysis company, Mintel prides itself on supplying objective information on a whole range of markets and marketing issues.

Mintel was founded in 1976 and has a long-established reputation as a leading publisher of “off-the-shelf” market information. Mintel has achieved “Superbrand” status in the UK, and is widely and regularly quoted in both national and specialist press.

There are three main sources of information and research stages used in the compilation of Mintel reports:

- Exclusive consumer research is commissioned by Mintel for individual reports, and non-exclusive large-scale surveys are also drawn upon extensively
- Trade interviews, both formal and informal, are conducted with relevant industry players
- Mintel’s exclusive market size and economic databases are utilized; these have been developed by our team of statisticians and based on government and business data.

Reports are written and managed by analysts who are specialists in specific markets, or in their own fields.

CONSUMER RESEARCH

Mintel commissions exclusive and original quantitative consumer research—especially for the reports. Mintel invests a considerable sum each year in consumer research. The Mintel report purchaser benefits as the price of an individual report is less than the cost of the original research alone. The research brings an up-to-date and unique insight into important topical issues.

Consumer research is conducted amongst a nationally representative sample of adults. Surveys are conducted by specialist survey research firms and typically include:

ICR Surveys: Telephone omnibus survey (EXCEL)

Results of these surveys are only available in Mintel reports.

In addition and as appropriate, Mintel reports draw on:

Simmons Research National Consumer Survey surveys using each of the three surveys covering “Households,” “Teens,” and “Kids.”
Appendix: Research Methodology

Sampling & Weighting

EXCEL is a national, twice-weekly, consumer telephone omnibus service.

With the assistance of Computer-Assisted Telephone Interviewing (CATI), interviewers contact, screen, and interview a nationally representative sample of adults, using a questionnaire prepared by Mintel.

In each EXCEL survey, at least 1,000 telephone interviews are conducted with males and females, 18 years of age or older living in telephone households located in the continental U.S. These interviews are quota-sampled so that one half of the respondents are males and one half are females. The sample for each EXCEL is a computer-generated, fully replicated, stratified, single-stage random-digit dialing (RDD) sample of telephone households.

Within each sample household, one adult respondent is randomly selected using a computerized procedure based on the Most Recent Birthday Method of respondent selection (i.e., May I please speak to the Male/Female, 18 years of age or older, living in this household who had the most recent birthday?). Interviewing for each EXCEL survey is conducted over a five-day period encompassing both weekdays and weekends.

Each EXCEL survey is weighted to provide nationally representative and projectable estimates of the adult population. The weighting process takes into account the disproportionate probabilities of household selection due to the number of separate telephone lines and the probability associated with the random selection of an individual household member. Following the application of weights, the sample is post-stratified and balanced by key demographics such as age, sex, region and education.

If you would like more information on the sample weighting procedure used for the EXCEL survey please contact Mintel.
Appendix: Research Methodology

**Simmons National Consumer Surveys “Households,” “Teens” & “Kids”**

Mintel reports frequently draw on the Simmons National Consumer Surveys, and may include data from its surveys of “Households,” “Teens,” “Kids,” & “Hispanics.”

The Simmons National Consumer Study (NCS) is a comprehensive survey of adult (18+ years of age) American consumers. It provides single-source measurement of major media, products, services, and in-depth consumer demographic and lifestyle/psychographic characteristics.

- 20,000 Adults 18+
- Single-phase data collection—media, product and consumer behavior data collected through a self-administered survey booklet
- Survey placed in the home via phone contact
- Upfront incentive/sweepstakes offer
- All household members participate by completing their own personal booklets
- Principal shopper completes one Household Survey
- Conducted twice each year—Spring & Fall
- Released twice each year—Spring & Fall reports
- Ability to look at full-year and six-month data

The samples for the Kids and Teens Studies are taken from the same households participating in the adult study. The Kids and Teens Studies provide in-depth insight into these consumer segments to understand their affect on the marketplace, and how and where to reach them.

- 2,500 Teens 12-17 and 2,600 Kids 6-11
- Both samples gathered from within NCS participating households
- Upfront incentive/sweepstakes offer
- All teens or kids in household participate by completing their own personal booklets
- Conducted twice each year—Spring & Fall
- Released twice each year—Spring & Fall reports

The Simmons National Hispanic Study is the only national, multi-media syndicated research instrument targeting the Hispanic market, and is particularly valuable in identifying media habits, product and service usage and attitudes and opinions among this segment.

- 10,000 Hispanic Adults 18+
- Single-phase data collection—media, product and consumer behavior data collected through a self-administered survey booklet
- Survey offered in Spanish or English—respondent’s choice
- Incentive/sweepstakes offer
- One person per household participates
- Conducted annually Released annually
Appendix: Research Methodology

Presentation & Definition

Unless otherwise stated, consumer research data are presented as penetration, i.e. as a percentage of demographic sub-groups such as age, e.g. 71% of 18-24 year olds are suncream users. Profiles are represented as proportions of the population, e.g. 8% of suncream users are aged 18-24.

Some reports contain qualitative research, either focus groups or in-depth interviews, and a full explanation of the methodology used in these areas is given in the individual Introduction section of such reports.

Definitions of the main consumer classification systems used in the report are shown at the end of this section.

Further Analysis

Consumer research is stored in a database supervised by Mintel’s data analysts and statisticians. For additional analysis of survey data, please call Joan Heaney or Bill Patterson at 312.932.0400.
Appendix: Research Methodology

TRADE RESEARCH

Informal trade research

Is undertaken for all reports. This involves contacting relevant players in the trade, not only to gain information concerning their own operations, but also to address various brand and marketing issues in the market under review. To ensure the accuracy of its reports, Mintel will send draft copies of reports to key industry representatives, and take account of their feedback. Comments, where appropriate, are incorporated into the report prior to final publication.

Formal trade research

Using experienced external researchers, in-depth trade interviews are carried out as appropriate for some reports. This takes the form of full trade interview questionnaires and direct quotations are included in the report. This gives valuable insight into a range of trade views on topical issues.

DESK & INTERNET RESEARCH

Mintel holds a variety of publications, including government statistics, consumer and trade association statistics, manufacturer-sponsored reports, annual reports, directories and articles from over 200 publications, from both the U.S. and abroad. All information is cross-referenced for easy access.

Data from other published sources are the latest available at the time of writing the report.

All analysts and writers have access to Mintel’s market size and economic factors database. This is a database containing all areas of consumer expenditure and macroeconomic and demographic factors which affect consumer spending. This database is used in conjunction with an SPSS forecasting package to produce a market size forecast.

Mintel subscribes to a number of online databases which are made available to our analysts.
Appendix: Research Methodology

SOURCES

Where data are provided by a particular source, the source is indicated below the Figure (Table). Often figures are sourced “Mintel”. This means that information is derived from a variety of sources, with the writer filling in any information gaps or interpreting data, to give an accurate representation of the market. In this way, it can be ensured that data are consistent both with other data in the report and the wider array of Mintel data.

Data that are estimated are referenced as such either because the original source data are only at the estimated stage and are not finalized or because they have been estimated by Mintel analysts.

DEFINITIONS

Most demographic definitions in the reports are self-explanatory; please contact Joan Heaney or Bill Patterson at 312.932.0400 if you have further questions.

FORECASTS

Market forecasts are created by Mintel’s in-house statisticians using the SPSS and/or SMARTFORECASTING software packages.

The statisticians correlate historic market size data with key economic and demographic variables, identifying those factors having most influence on the market. Using forward projections of these factors, a market size forecast is produced.

Mintel has compiled its own database of key economic and demographic variables from government and independent sources. The database includes both historical and projected data and are used in combination with Mintel’s own market size and segmentation database.
APPENDIX: WHAT IS MINTeL?

MINTeL PUBLICATIONS

In the UK, Mintel publishes over 25 reports each month, covering a wide range of sectors and focusing on topical marketing issues. The ‘Intelligence’ reports are published in five series—Market, Leisure, Retail, Finance and Special Reports—as well as the Irish Series, Industrial, EuroViews and the Internet series.

In the U.S., Mintel publishes its consumer intelligence series of reports. consumer intelligence covers 13 sectors: Foodservice, Food, Drink, Pursuits/Hobbies, Travel, Clothing/Fashion, Health/Medical, Beauty/Personal, Household, Services, Publishing, Automotive and e-commerce.

Mintel publications provide analysis of market sizes and trends, market segmentation, and consumer attitudes and purchasing habits, as well as assessing the future of the market.

By providing a comprehensive picture of the consumer, Mintel’s reports provide thorough analyses of market sectors, breaking down often complex issues into easy-to-understand sections that detail marketing opportunities and weaknesses.

What does the future hold for my business? What do my consumers want? What strategies are my competitors employing? What is likely to happen over the next few years?

The future of your marketing depends on answering these questions—something Mintel prides itself on.

The key to being well equipped for the future is a better understanding of the present. So whatever your question, Mintel will have the answer.

Mintel also publishes an Index, updated every month, which is a comprehensive guide to all reports published by Mintel publications from 1998 to date. If you would like details of an earlier report or further details regarding any of the reports mentioned in the Index, please contact the Mintel information team in Chicago at 312.932.0400 or in London at +11 44 (0)20 7606 4533 or email info@mintel.com.
Appendix: What is Mintel?

MINTeL SERVICES

Operating for more than 25 years, Mintel Services has unrivaled, independent experience in the fast-moving product intelligence market. Our in-house team researches trends in consumer packaged goods (cpg) sectors and offers specialist in-depth analyses and services.

No other information service provider can put you in touch with global consumer markets by sourcing new or established products, putting them in your hands, monitoring your competitors in stores in over 130 countries, performing quality analyses, and providing a breadth and depth of published data which are simply unrivaled.

Mintel Services can provide a customized service, with tactical delivery of information according to your requirements, or offer you a comprehensive range of products and publications.

Product retrieval

You’ve seen or heard of a product existing in Australia that has given you an idea…but first you want to get your hands on the real thing. One phone call to Mintel Services and we will have one of our field associates retrieve the product, from the country you specify, within 24 hours. As soon as possible, the product will be on your desk. The product retrieval service allows you to perform quality assurance tests, generate new product ideas, undertake consumer product sampling, procure products for tasting panels, identify gaps in the market, perform competitor evaluations, and evaluate new export markets.

Retail audits

You can receive regular details and updates about your competitors’ single items, whole product ranges, or from particular outlets, delivered straight to your door, as often as you wish. Data can also be collected simultaneously in any number of countries to give you instant worldwide snapshots of particular consumer markets. Many of our researchers use electronic messaging services to deliver the data to you, via Mintel Services, within hours of being collected.

Within hours of your request, we can have one of our worldwide contacts out in a store, surveying the state of your and your competitors’ products. For each product or brand, any or all of the following information can be collected, pricing surveys, comprehensive shelf surveys, trade-age surveys, and pack appearance monitoring.

Tailored research

You simply brief our worldwide network of field associates as to which sectors you are interested in, and they will constantly monitor the retail shelves and trade literature in their region for the new products. The information will then be compiled and sent to you—putting your finger on the pulse, yet keeping your hands free.
If you require something more specific, just tell us what you want and our network of researchers can be your eyes and ears. You will have a global army of information gatherers working for you. Whether it’s a particular variety of coffee bean found in Papua New Guinea or spices in India, the network will be on the lookout for your requirements.

Choose from any combination of our core services and tailor them to suit your own individual company needs, budget and preferences.

You can make two kinds of decision. One is informed, the other is not. Track it. Trial it. Try it, with Mintel Services.

For details on how to set up an account with Mintel Services, or to discuss your latest project, telephone Paul Phillips at 312.932.0400 or email paulp@mintel.com.
Appendix: What is Mintel?

Global New Products Database

The world’s premier editorial coverage of new product development, the \textit{gnpd} is a comprehensive database that monitors worldwide product innovation in consumer packaged goods markets, offering unrivaled coverage of new product activity for competitor monitoring and product idea generation.

The \textit{gnpd} covers:

- food, beverage and non-food sectors
- 31 categories and 101 sub-categories
- all key global markets.

The \textit{gnpd} features:

- pictures, ingredients, product details and descriptions of all key new products
- fully searchable fields
- ability to save search criteria
- front page that can be customized to user preferences
- extract facility to create customized reports and presentations
- daily updates
- email alert service to deliver the latest news straight to your desktop
- dedicated customer service
- free consultancy advisory service from our highly experienced editorial teams in London and Chicago
- full IT training from the \textit{gnpd} helpdesk.

Whether you want to monitor how your market is evolving or require instant information on a specific product, you’ll find it all at your fingertips with \textit{gnpd}. 
Appendix: What is Mintel?

**RESEARCH SUPPORT/CONSULTANCY/MIC**

- Mintel’s in-house market analysts are on hand to assist subscribers with any further questions on published reports.
- MiC—the Mintel Information Center—provides an excellent complementary service for additional customized information requests.

**The Mintel Information Centre (MiC)**

- Analyzing any figure, any market, any country
- MiC is the information center of Mintel, undertaking customized research which range from a simple question to the commissioning of exclusive and in-depth market research studies.
- Saving you not only time and money, but also energy
- Answers can be on your desktop in a fraction of the time compared with conducting or organizing the search yourself
- Access to a vast array of online information services
- Unparalleled library of business and marketing information, statistics, trade journals and within-industry contacts
- Each enquiry handled by a professional research manager (even if it is just providing a single figure).

There are two ways to use the MiC service—as a subscriber or ad hoc. A subscription starts from £1,000 and this money is deposited in an account and used as payment for any information delivered.

If you cannot find the report you want listed in our published titles, simply ask MiC to write it for you. MiC is in a unique position to bring together proven experts on many CPG, leisure, financial and retail markets, together with consumer lifestyle and attitudinal findings, to produce authoritative market studies that will be concise, easy to read and actionable.

**PR Research**

Mintel’s expertise in producing tailor-made market research with maximum media appeal has been built up over many years. Mintel’s strength is that we produce independent, reliable research respected by both end users—manufacturers, retailers, financial institutions, leisure companies etc.—and the media. Through MiC, you can commission a report that serves the dual purpose of forming the base for a publicity campaign, yet remains a strategic document to be used in the product development process.

For details on how to set up an account with MiC, or to discuss your latest PR project, simply telephone Sarah Cocker on +11 44 (0)20 7606 4533 or email scocker@mintel.com.