

## December 2022

### Beer - UK

"Pro-actively offering dish-matching recommendations for their drinks, both in-store and via online retail channels, should help beer brands to tap into increased at-home meal occasions during the income squeeze. Meal pairing suggestions are also relevant to driving usage occasions in the on-trade and can serve to encourage trading up where ...

## November 2022

### Pub Visiting - UK

"The pub industry is recovering well from the extended implications of the COVID-19 pandemic, and is nearly back to its pre-pandemic value. The sector faces increased competition from competitive socialising venues, which continue to be popular – particularly amongst Gen Zs. Moving forward, pubs should focus on diversifying their offerings ...

### Leisure Outlook - UK

"The recent increase in gym usage highlights the importance consumers continue to place on good physical and mental wellbeing. However, the fact that over-65s are most likely to be motivated by activities that are good for their physical wellbeing, but the least likely to attend the gym suggests there are ...

### Coffee - UK

"A reversal in the previously flourishing coffee retail market's performance in 2022 is underpinned by the end of COVID-19 restrictions and cutbacks amid the cost of living crisis. Many consumers' efforts to consume less caffeine also present a challenge. Addressing the various barriers towards decaffeinated coffee is needed to release ...

### Still, Sparkling and Fortified Wine - UK

"The cost-of-living crisis has driven down sales of wine in 2022, reflecting its discretionary nature and high price. 'Switch and Save' suggestions should help retailers to appeal as a good value place to buy wine. Marketing messages portraying wine as enhancing low-key at-home occasions will help brands to drive purchase ...

## September 2022

### Food and Non-food Discounters - UK

"Following two years of pandemic-impacted trading the UK's economy has now been hit by record inflation. Amid this growing cost-of-living crisis, consumers are increasingly looking at ways to stretch already tight budgets. The discounters with their clear value focus are set to benefit from this period of financial uncertainty. As ...

### Dark Spirits and Liqueurs - UK

"Dark spirits and liqueurs' discretionary nature and relatively high price mean that they are likely to lose sales over 2022-23 as a result of pressure on household incomes. Smaller formats, including RTD versions, are among means for brands to support sales even as shoppers economise. Extensions into sweet treats also ...

### Yogurt and Yogurt Drinks - UK

### Tea and Other Hot Drinks - UK

“Rapidly rising inflation in the yogurt category and the wider cost of living crisis put the leading brands at risk of trading down in 2022 and 2023. The continued interest in health however will drive continued demand in the category, also creating opportunities for operators to drive added value. Keen ...

“Tea holds a comforting constancy for people. The cost-of-living crisis will boost the appeal of this perception, as consumers seek out emotional support during stressful times, while cost-saving efforts fuelling at-home occasions should prevent a steeper drop in tea retail sales. Localism and alcohol moderation trends represent potential areas of ...

### August 2022

#### Attitudes towards Low- and No-Alcohol Drinks - UK

“The market’s overpriced image is curbing growth during the cost-of-living crisis. Developing flavour complexity, for example through aroma and warming ingredients, and exploring added benefits around health and mood will help to boost perceptions of value. Inclusion in lunchtime meal deals will lower the price barrier, boost visibility and unlock ...

### July 2022

#### How People Shop for Alcoholic Drinks - UK

“Meal deals’ important role in driving alcoholic drinks sales, particularly among younger adults, suggests that more brands should look to be included in these promotions. Meal deals can help to cut through decision paralysis among people feeling overwhelmed by retailers’ selections, and can also help to drive sales of alcoholic ...

#### Travel Hub Foodservice - UK

“Having endured an extremely challenging couple of years, UK travel hubs must now contend with the cost-of-living crisis. The threat of commuters seeking cheaper alternatives is driving travel hub foodservices to play on price, but high overheads make this unsustainable.

Providing good value is not always about being the cheapest ...

### June 2022

#### Bottled Water - UK

“The income squeeze and the accelerated sustainability movement will further ingrain the use of refillable bottles and severely test the resilience of the bottled water market. Added value innovation that taps into the leading usage drivers – taste, health, hydration and energy/focus – is set to be pivotal in ...

#### Food and Drink Gifting - UK

“Food and drink gifting occasions will remain resilient during the income squeeze in 2022-23, but there is a strong likelihood of trading down within categories. Recommendations of more affordable substitutes for favourite products should chime in this climate. ‘Build your own gift package’ initiatives can also help retailers to attract ...

#### Brand Overview: Drink - UK

#### Alcoholic Drinks Review - UK

“As inflationary issues and economic uncertainty impact on household budgets and discretionary spend, it will become even more critical for brands to communicate their value proposition to resonate with consumers. Brands that align their offerings to wellness trends, position their launches as more than just beverages and encourage consumers to ...

“Alcoholic drinks’ discretionary nature puts them in line for cutbacks in 2022 as inflation accelerates. Further NPD in smaller formats designed to hit a more accessible price point should help brands to maintain sales, also appealing to those moderating alcohol intake for health reasons. Visual effects such as colour-changing can ...

### May 2022

#### Leisure Outlook - UK

“18-24s are now as likely to take part in competitive socialising activities as they are to go to the pub for drinks, highlighting their desire for new and varied activities that provide a sense of adrenaline but don’t necessarily involve consuming alcohol”.

– Paul Davies, Category Director – Leisure, Travel ...

#### Cider - UK

“Hit by COVID-19, the cider market isn’t out of the woods yet, as the rising cost of living hampers consumers’ previously enthusiastic return to hospitality. However, interest in sustainability and health provide cider brands with plenty of opportunities for driving consumer engagement with the market in the longer term.” ...

### April 2022

#### Attitudes towards Healthy Eating - UK

“Propelled by the pandemic-driven rise in both eco- and health- consciousness, the prevailing ‘holistic health’ ethos is increasingly extending to that of the planet, and a very powerful proposition will be created through bringing together benefits around both. The popular concepts of ‘food as medicine’ and ‘mood foods’ continue to ...

#### Baby Food and Drink - UK

“Pressure on household incomes in 2022 will erode sales of baby food, drink and milk by boosting scratch cooking and further reducing birth rates. Parent/toddler cooking kits and frozen baby/toddler food products warrant attention, given strong consumer interest and limited availability. The former’s appeal as a fun and ...

#### Consumers and the Economic Outlook Q1 - UK

“Even before the conflict in Ukraine, inflation had become the biggest concern for consumers, brands and the British economy for 2022. Households are set to endure the biggest squeeze on real incomes in decades, and the conflict in Ukraine will only add to existing inflationary pressures. This is seen in ...

### March 2022

#### Attitudes towards HFSS Food & Drink - UK

“Restrictions on the promotion of HFSS food and drink are due to kick in from October 2022 and will hit the visibility of products under the categories covered. Categories where a very high proportion of products are HFSS, such as chocolate, crisps and cakes, will be hardest hit, especially because ...

### February 2022

#### Fruit Juice, Juice Drinks and Smoothies - UK

“With the ‘food as medicine’ concept gaining traction during the pandemic, functional benefits will be key to keeping fruit juice and smoothies on the menu during the income squeeze in 2022. Positioning these as supplement alternatives can boost usage frequency, while there is untapped potential for brands in this market ...

#### Leisure Outlook - UK

“The first signs of how inflation will impact the foodservice market are beginning to show. Takeaways remain a popular option with consumers’ substituting evenings out with evenings in, meanwhile those heading out for a meal are favouring full-service restaurants that justify the expense by offering something extra special”.

#### White Spirits and RTDs - UK

“Pressure on household incomes in 2022 will erode sales of white spirits owing to their relatively high price and discretionary nature. Promoting simple and relatively inexpensive mixed drink recipes and further NPD in smaller formats designed to hit a more accessible price point should help brands to support sales during ...

#### Attitudes towards Premium Alcoholic Drinks - UK

“Although losing on-trade sales, premium alcoholic drinks’ retail sales benefited from the overall growth in retail alcohol drinks sales in 2020, sustained in 2021, amid the COVID-19 restrictions. The segment also gained users from shoppers trading up. However, sales are now under threat amid the income squeeze. Encouraging recommendations and ...

### January 2022

#### Carbonated Soft Drinks - UK

“The alcohol moderation trend accelerated by the COVID-19 outbreak can be further mined in CSDs, for example through alcohol-inspired flavours and providing more food pairing inspiration. Meanwhile, harnessing the power of aroma to amplify the all-important enjoyment factor is a missed opportunity. Less sweet flavours could be key to boosting ...

#### Beer - UK

“After a tough couple of years owing to the COVID-19 pandemic, beer brands can look to the future and tap into the sense of adventure felt amongst beer drinkers: 59% say they enjoy experimenting with new types of beer. This indicates a pressing need for brands to continue to innovate ...