

### January 2018

#### The Leisure Outlook - UK

“Changes in leisure activity participation and spending indicate that consumers are choosing quality over quantity when it comes to drinking and dining out. Increased voucher usage also reflects that Brits are keen to keep up their leisure habits but seeking ways to make this more affordable.”

– Helen Fricker ...

#### Beer - UK

“A likely growth segment in the coming years is low- and non-alcoholic beers. While decidedly niche, high profile launches from Heineken and Budweiser over the past year are helping to raise its profile and buoy growth.”

### December 2017

#### White Spirits and RTDs - UK

“Recommendations, either from friends/family or from drinks professionals, are pivotal in bringing new users to white spirits. Shared discounts and marketing themed around shared knowledge offer viable means for companies to persuade people to recommend their products. The influence of bartenders also offers venues scope to encourage trading up ...

#### Still, Sparkling and Fortified Wine - UK

“There is clear consumer interest in seeing more wines from regions such as Eastern Europe and Asia. Operators may also benefit by tapping into interest in other formats like cans and pouches which are becoming more credible alternatives to bottles.”

### November 2017

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

“While the Sugar Levy will impact juice drink sales, sugary variants in particular, there is marked potential to retain consumers through innovation in low-/no-added-sugar variants. Fruit juice has continued to struggle under the scrutiny over sugar, while the touting of functional health benefits appears to have helped smoothies flourish ...

#### Supermarkets - UK

“The supermarket sector is expected to return to growth for the first time in four years in 2017. However it is still a sector fighting against the grain of current shopping habits. Consumers continue to move to more fluid and frequent habits and the discounters continue to present a considerable ...

#### Consumers and the Economic Outlook: Quarterly Update - UK

“Consumers’ spending power is being hit by the squeeze on incomes as inflation continues to outpace average wage rises. In four of the last five months, people have been more likely to feel worse off compared to a year ago than to say that their finances have improved. This is ...

### September 2017

## Drink - UK

### Dark Spirits and Liqueurs - UK

“Drinking with mixers and gifting are key entry points for dark spirits. Mixed drink recipe suggestions are therefore a crucial means to draw in new users, while promotions around young adults’ rites of passage would better enable companies to harness the power of gifting as an introduction to dark spirits ...

### The Leisure Outlook - UK

“Leisure activities are driven by younger Millennials and parents of under-16s. Eating at pubs is a popular leisure activity, yet so is staying-in and ordering a takeaway. As the pay squeeze intensifies, more people are turning to free activities such as museums and galleries. Meanwhile, people are continuing to focus ...

### Food and Non-food Discounters - UK

“Over the past 10 years the discount sector, both food and non-food, has shown that it is highly adaptable, succeeding to thrive in both market conditions which favoured a low-cost alternative and in conditions where traditionally there would have been less demand. With an uncertain economic outlook in the short ...

### Attitudes towards Private Label Alcoholic Drinks - UK

“Highlighting the heritage of the producers behind private label alcohol and giving more information about how and where the drinks are made will elicit more trust from consumers. Similarly, flagging up the skills and expertise of their in-house experts will help to build confidence in private label ranges.”

## August 2017

### Sports and Energy Drinks - UK

“Consumers show real interest in fortified water products that offer sports and energy benefits, and in health drinks from brands already active in these markets. This interest suggests areas for operators to explore in order to build relevance among a wider audience, and as well as offering opportunities in the ...

### Coffee - UK

“While the market continues to enjoy value growth, recent stagnation in household penetration of coffee pod machines is curbing the volume performance. Exploring subscription models could tackle the barrier that the upfront cost of the machines poses. Meanwhile, variety packs featuring coffee with different roast styles and origins could help ...

### Consumers and the Economic Outlook: Quarterly Update - UK

“The snap election clearly unsettled consumers. All three of our measures of sentiment fell between April and May. And the inconclusive result means that there was no immediate bounce in confidence post-election. Instead, our data shows that people were even more concerned after the results were announced than they were ...

## July 2017

### Tea and Other Hot Drinks - UK

“Although black tea is still drunk by the vast majority of people, competition from other tea types, as well as

### Yogurt and Yogurt Drinks - UK

“Consumer suspicions around artificial sweeteners present a significant barrier to companies looking to

## Drink - UK

coffee and soft drinks, has chipped away at its role as Britons' go-to day-to-day drink. Indulgent flavours could help to sidestep younger consumers' dislike of the bitterness of black tea ...

reformulation to meet the sugar reduction targets. However, the appeal of less sweet-tasting yogurts offers opportunities to cut sugar without replacing it."

– Alice Baker, Research Analyst

### Carbonated Soft Drinks - UK

"While the Sugar Levy is likely to impact heavily on CSD sales, sugary variants in particular, there is marked opportunity to move sugary CSD drinkers over to diet/light variants. Low price and proving the flavour credentials of these variants are key to encouraging switching."

– Alyson Parkes, Research ...

## June 2017

### Soft Drinks Review - UK

"The major focus of the soft drinks market in recent years has been on sugar reduction, in response to consumer concerns about sugar and more recently in preparation for the introduction of the Soft Drinks Industry Levy. Sugar is not the only health factor influencing the market though, with a ...

### Attitudes towards Sports Nutrition - UK

"Sports nutrition continues to enjoy growth thanks to it having attracted a more diverse user group; however, the category is facing intensifying competition from mainstream foods embracing a high-protein proposition. Demand for sports nutrition products made with all-natural ingredients and those without sugar highlight areas of focus for brands going ...

## May 2017

### Added Value in Dairy Drinks, Milk and Cream - UK

"While it might be tempting for supermarkets to renew hostilities in their milk price wars as household disposable incomes come under pressure, this could prove a double-edged sword. Many shoppers see milk price cuts as disadvantaging farmers and are consequently prepared to boycott milk from a supermarket seen to be ...

### Cordials and Squashes - UK

"With some consumers showing concerns about both sugar and artificial sweeteners, the category faces a challenge in staying on the menu. Meanwhile, declining alcohol consumption presents an opportunity for cordials and squashes to reach a new audience. However, the category's current commodity status and strong family appeal may impede this ...

### Pub Visiting - UK

"Continuing to grow sales will be particularly important to pub operators in order just to stand still in terms of profits, given increased operating costs in 2017. Household budgets also look likely to be squeezed

### The Leisure Outlook - UK

"Overall almost all the leisure activities covered have seen increased visitation over the last 12 months which is good news for the industry. It is hard to predict what Brexit will mean in terms of consumer behaviour but it

during 2017 by rising inflation, impacting on discretionary spending in pubs. This will all make ...

does appear that it is driving more cautious spending and not ...

### Convenience Stores - UK

“The convenience retail sector has enjoyed a strong period of growth but for the first time in a number of years there are clouds on the horizon. Rising food inflation is likely to see greater scrutiny placed on the price premium often associated with convenience stores.”

– Nick Carroll ...

## April 2017

### Baby Food and Drink - UK

“Seeds of change – which could revolutionise the baby food and drink retail landscape – have been planted by the discounters. 2016 saw Aldi extend its offering dramatically and Lidl make its first venture into this category. If this evolving presence is well-received by parents this could curb future price ...

## March 2017

### Online Grocery Retailing - UK

“Online grocery is the quickest growing grocery channel, but equally the smallest. Once seen as simply a service to replicate the needs of a supermarket shop online, a number of new services came to market in 2016 that have the potential for online grocery to transcend this barrier and adequately ...

### Bottled Water - UK

“That 46% of drinkers/buyers cut back when money is tight signals a warning for the market, given the economic uncertainty and threat of future inflation. An emphasis on environmental preservation offers a promising means for companies to differentiate their offering given the strong consumer interest in this area.”  
...

### Consumers and the Economic Outlook: Quarterly Update - UK

“Consumer sentiment has remained strong, reflecting growing real wages, low unemployment and, as yet, the absence of any major economic upheaval post-EU vote. When it comes to the impact of the vote, people are relatively positive about the big-picture issues such as the UK’s economic growth, and most feel ...

## February 2017

### Attitudes towards Low- and Non-alcoholic Drink - UK

“Consumers have been cutting back on the amount of alcohol they drink for financial and health reasons and this presents a big opportunity for low-alcohol and non-alcoholic/alcohol-free beers, ciders and wines. Negative taste perceptions, low product visibility and limited promotional support are still holding the market back from realising ...

**January 2017**

### Cider - UK

“Interest in authenticity can be further mined by brands by providing more information about the ingredients and processes used by their skilled cider makers. Importantly, it needs to be spelled out how these factors contribute to products’ signature taste profile, highlighting the flavour as inimitable.”

### Attitudes towards Sugar & Sweeteners - UK

“Facing increased pressure from multiple sides to cut sugar, both retailers and food and drink manufacturers will need to demonstrate their commitment to improving public health. While the widespread suspicions of artificial sweeteners present a significant challenge, consumers’ openness to alternative sugar substitutes and to less sweet-tasting products also gives ...