Low2No Alcohol Report 2021

June 2021

WELCOME TO THE LOW2NO REPORT 2021

About Lumina Intelligence

Lumina Intelligence inspires the global food and drink sector with deep, actionable insights powered by the world's best analytics technology. Our products and services are used by the major brands and organisations in these fast moving and growing markets to support business planning, strategic marketing and new product development.

Part of the William Reed group, you can trust our market knowledge. We are committed to providing all our customers with up to date accurate information to support critical decision making. We are the experts in market and consumer insight across the food & drink and nutrition markets.

Want to know more?

For more information or to find out about our other products such as continuous tracking of drinking habits in the eating and drinking out markets or convenience market, please contact:

Holly Franklin (holly.franklin@lumina-intelligence.com)

Executive Summary

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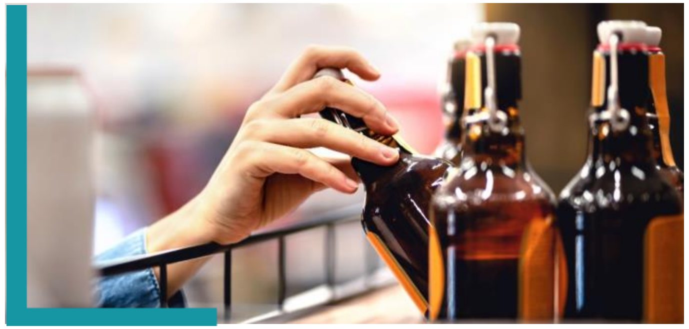
- Purchase Hierarchy
- Purchase motivations
- Barriers to Purchase
- Low2No definitions and drivers
- Case Studies & Interviews

EXECUTIVE SUMMARY

Supermarkets play a key role in induction to the category



- Supermarkets (in-store) is the primary place that consumers have first purchased the Low2No category.
- This is main channel used by those who purchase the category frequently, highlighting the limited range available in many outlets in other channels, including pubs and convenience stores.
- Visibility of choice is a strength of the supermarket channel and more can be done to de-risk and reach new consumers through sampling.

Key motivations include driving and appealing products

- Consumers demand more choice within the category. After driving, the second most cited reason is an “appealing” product.
- A product “looking appealing” is the most important motivation for buying Low2No in the on-trade in London, reflecting both lower car ownership as well as a more developed Low2No offer in the capital.
- In the off-trade the strongest motivations are a desire to try something new (12%) and as a healthier option (12%).

Pricing and visibility are the greatest barriers to purchase

- The most significant challenge to the Low2No category is pricing. Many consider it too expensive (16%) and poor value for money (14%) – with consumers expecting the price to be equal or lower than full strength alcohol.
- Not seeing the product in the store/bar; not being able to find what they are looking for; and a lack of selection of well-known brands are barriers to purchase – meaning the category will be inhibited until signposting, visibility and choice improves.

Source: Lumina Intelligence, June 2021

Low2No definitions and drivers

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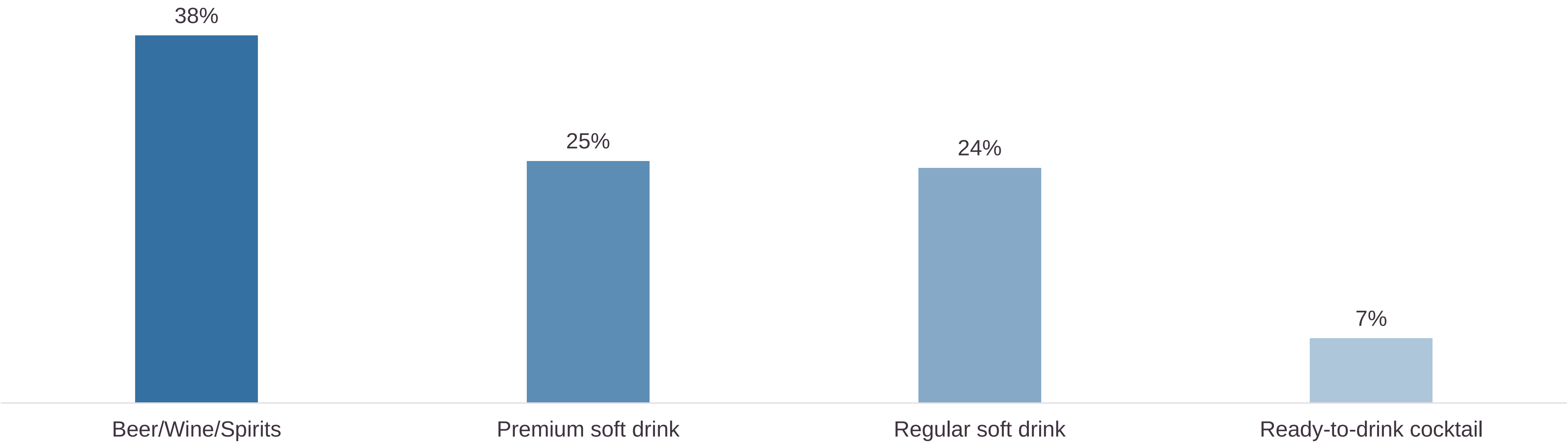
MAJORITY DEFINE LOW2 NO AS EITHER BWS OR A SOFT DRINK

The perception of Low2No directly impacts the positioning of the category and its pricing strategy. 38% of consumers associate the category with alcoholic beverages therefore, in stores, the drinks should be located in the alcohol aisle.

How would classify Low 2 No BWS?

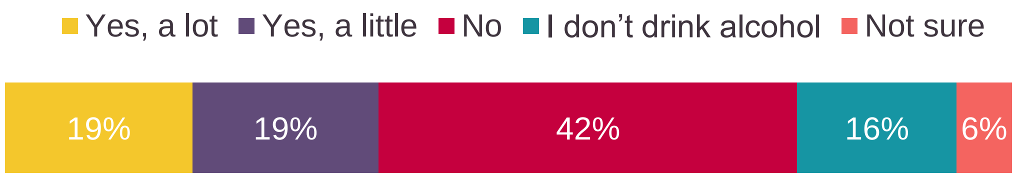


Source: Lumina Intelligence BWS Bespoke Survey, November 2020

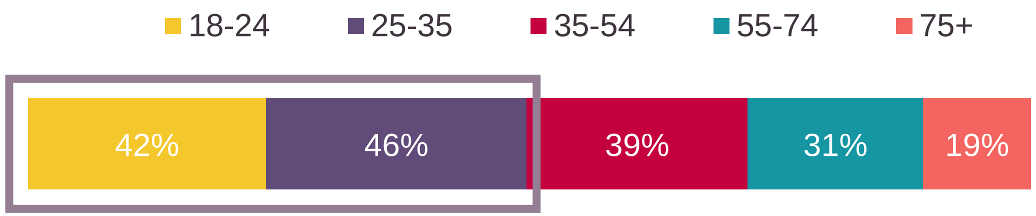
LOW 2 NO ALCOHOL CATEGORY HAS EXPANDED AND EVOLVED

The Low 2 No category has been growing in line with the interest in health consciousness. The pandemic has further triggered changes in alcohol consumption behaviour with 38% of consumers reducing their consumption at least a bit since lockdown, spiking amongst the 18-35 demographic. The category continues to evolve with rampant new product development from both small producers and established suppliers alike.

Have you reduced your alcohol consumption since lockdown started?



Consumers who answered yes, a little/yes, a lot



Budweiser has launched **Bud Zero** which has zero alcohol, zero sugar and only 46 calories

Drinks giant **Diageo** launched **Gordon's 0.0** gin in time for Dry January 2021

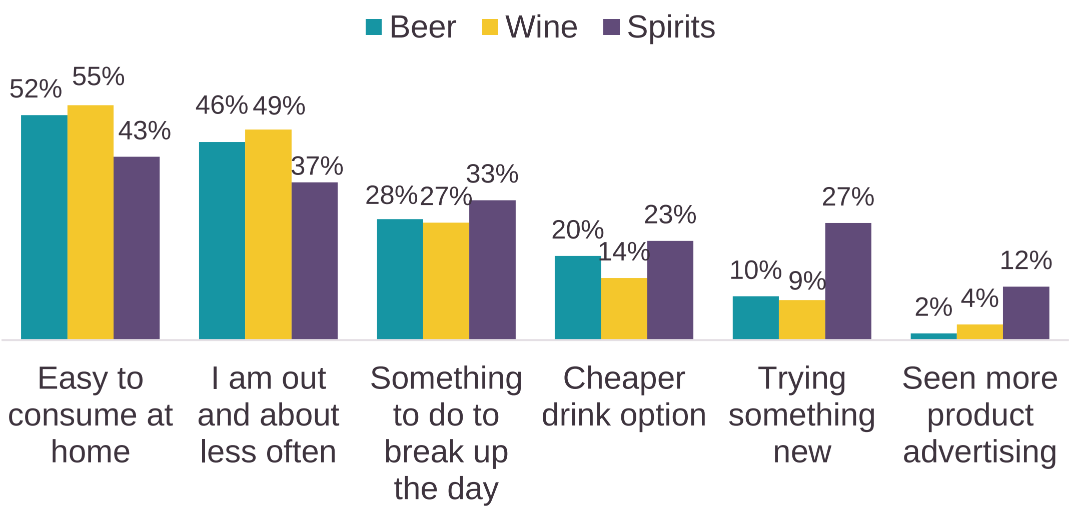
Thatcher's Zero was two years in the making and is the brands first non-alcoholic cider

Source: Lumina Intelligence BWS Bespoke Survey, November 2020

COVID RESTRICTIONS MAIN DRIVER BEHIND CHANGES

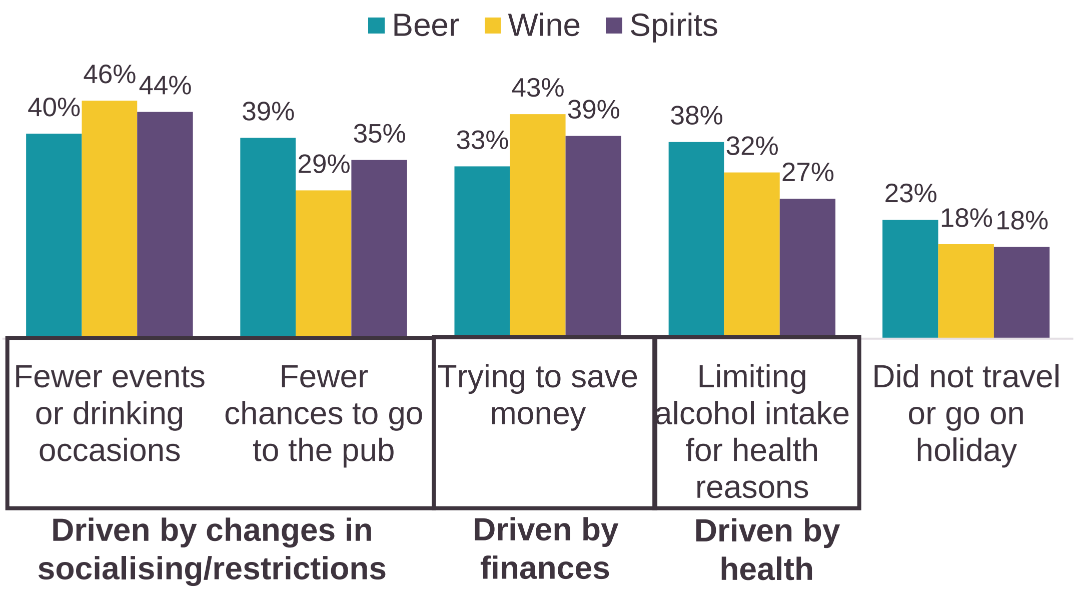
Reflecting the impact of Coronavirus on daily lives, "ease of consuming at home" is the top driver for the increase in consumption. However there is a polarisation in consumer behaviour as being out and about less often is the second top driver for drinking more but fewer events/drink occasions is the top driver for drinking less. Restrictions aside, saving money and health conscious consumers are driving factors behind drinking less.

Why are you drinking more?



MORE

Why are you drinking less?



LESS

Source: Lumina Intelligence BWS Bespoke Survey, November 2020

HEALTH REASONS MOST IMPORTANT TO LOW 2 NO DRINKERS

Younger consumers are more health-conscious than their older counterparts: 18-24s and 35-44s are the most likely to be driven by health reasons, whereas 65+ are -15% less likely to be. There is the opposite pattern with price point as younger consumers are more likely to buy because it's a cheaper option vs. older consumers who are less price sensitive.

Most important factors considered when consuming Low 2 No

Health reasons	Try something new	Easy to consume in home	Given a free taster	Cheaper drink option	To break up the day	Out and about less often	Seen more product advertising
31%	25%	17%	17%	14%	7%	7%	7%

Largest over-indexes by age group:

18-24's prioritise health reasons **(+14%)** and are more likely to be put off by price (**+51%** more likely to factor in cheaper option as a consideration)

25-34's are more likely to drink Low 2 No because they want to try something new **(-7%)** rather than because they've seen product advertising **(-69%)**

35-44's are the second most likely demographic to be motivated by health reasons **(+7%)** behind only 18-24s.

45-54's are more likely to consume Low 2 No because they want to try something new **(-30%)**

55-64's are the least receptive to product advertising **(-93%)**

65+'s are the least motivated by health reasons **(-15%)** and less price sensitive (**-81%** would choose drink because it's a cheaper option)

Source: Lumina Intelligence BWS Bespoke Survey, November 2020

Hierarchy

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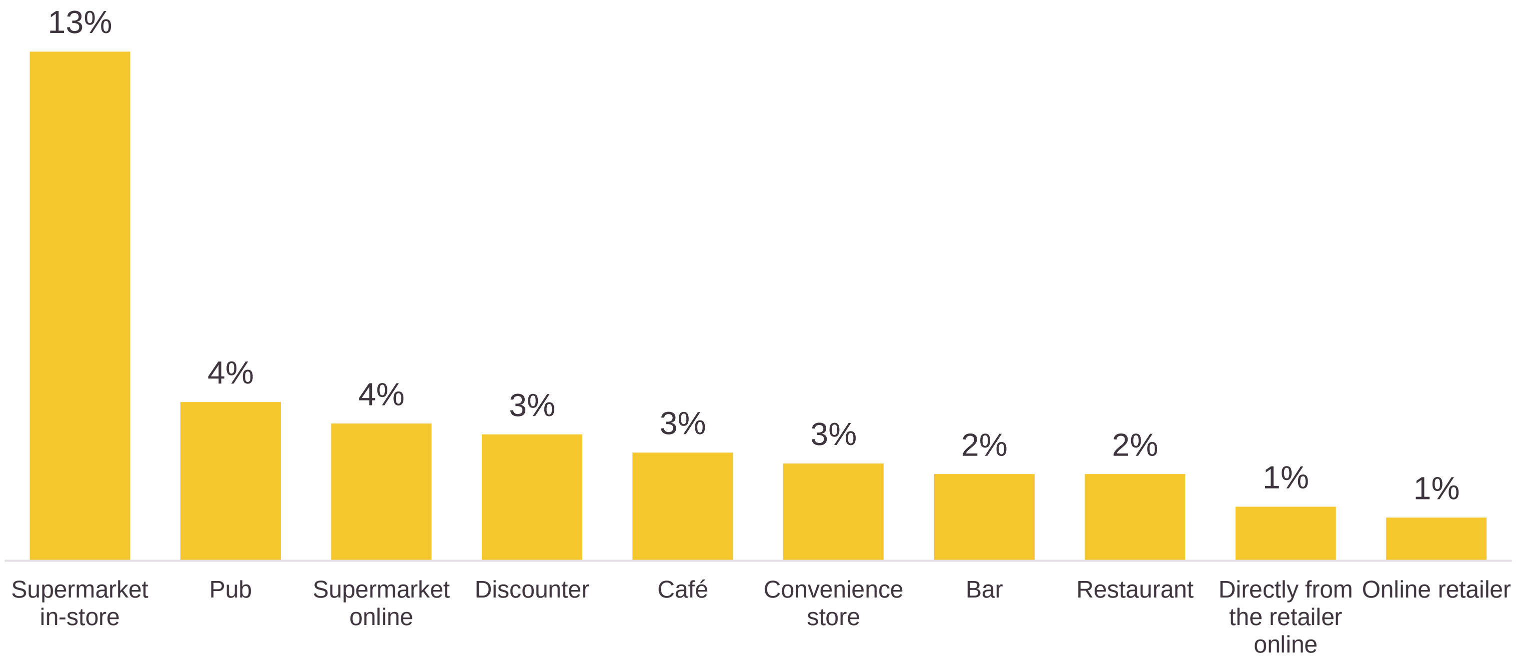
LOW2NO PRODUCTS TEND TO BE DISCOVERED IN SUPERMARKETS

Driven by the current availability (main focus of Low2No to date has been in the off-trade), consumers are most likely to buy Low2No for the first time from a supermarket. Sampling campaigns, immersive experiences and sensory activities are the ideal for showcasing a new product and creating a lasting memory, which can arguably be better delivered in the theatre of the on-trade.

Where did you first buy a Low2No drink from?



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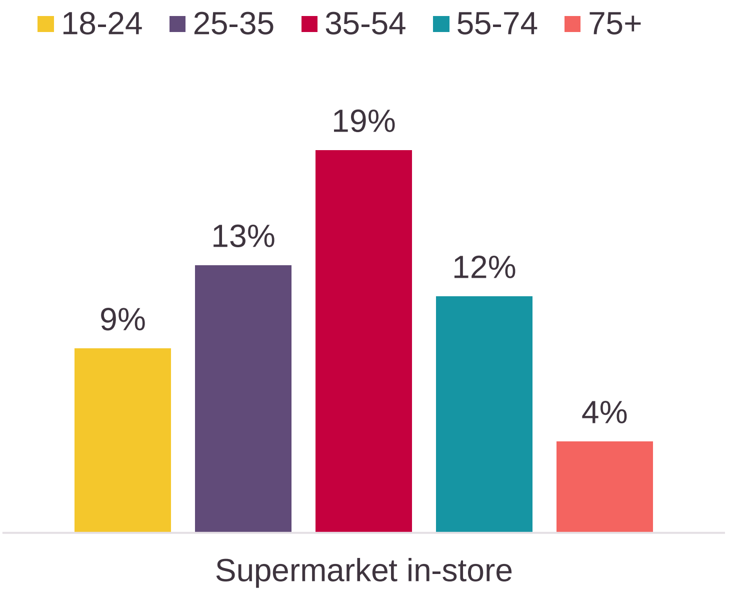
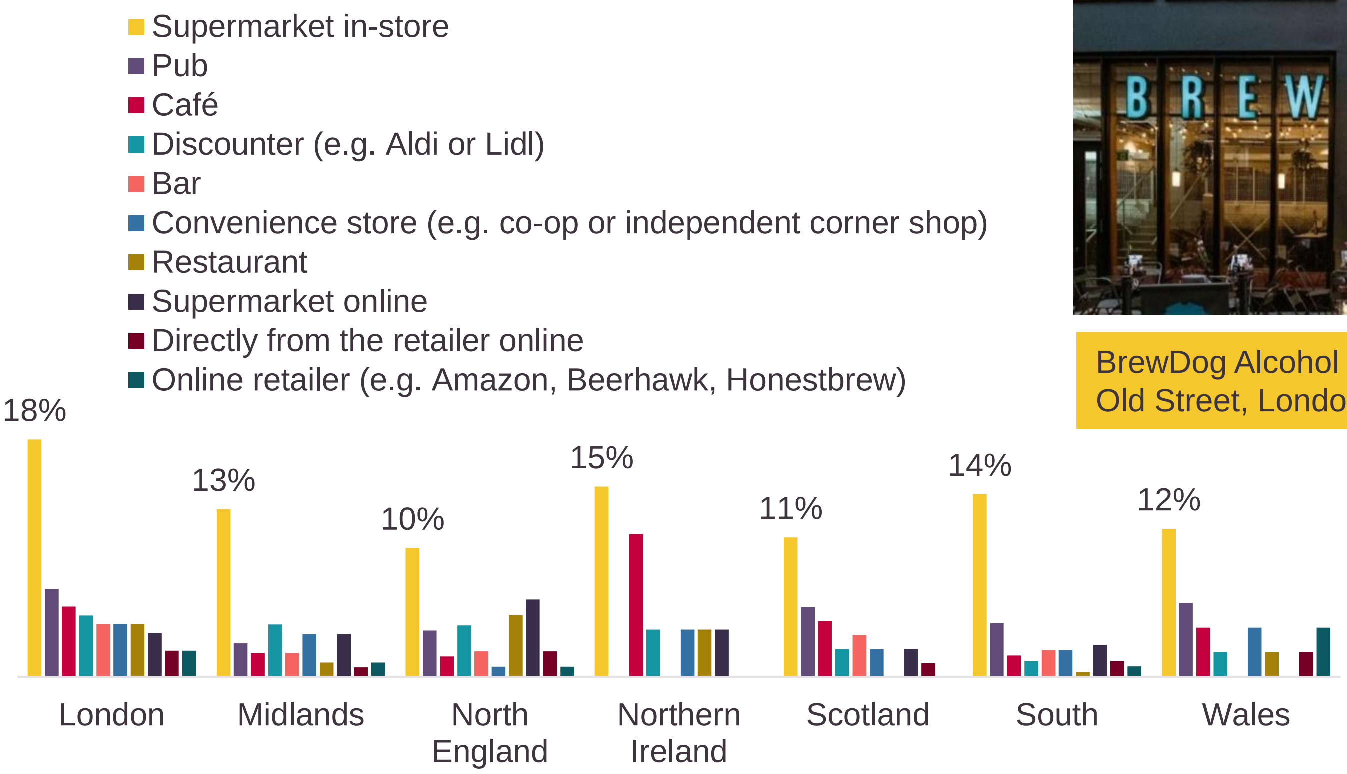


Source: Lumina Intelligence Low2No Bespoke Survey May 2021

LONDON IS THE LOW2NO HOTSPOT

London has become a hotspot for Low2No beverages, with pop-up and permanent alcohol-free bars becoming a new trend, raising awareness of the category.

Where did you first buy a Low2No drink from?



BrewDog Alcohol Free bar
Old Street, London

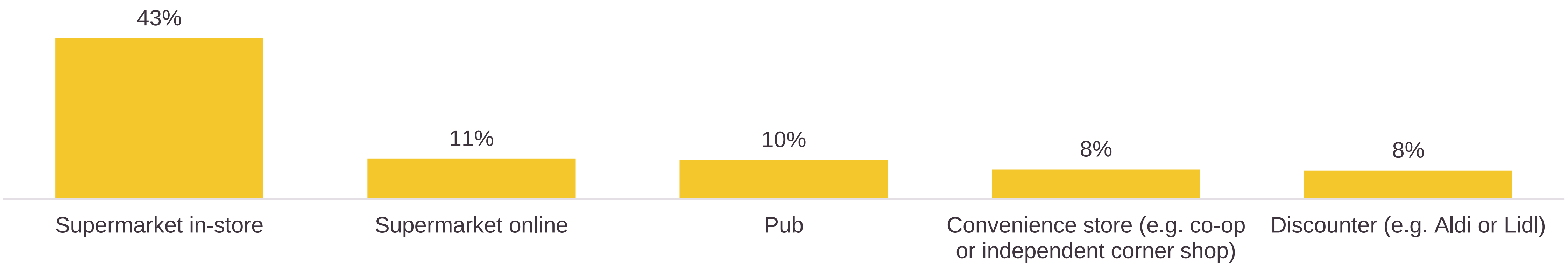
Low/No alcohol cocktail menu, BeAtOne, London

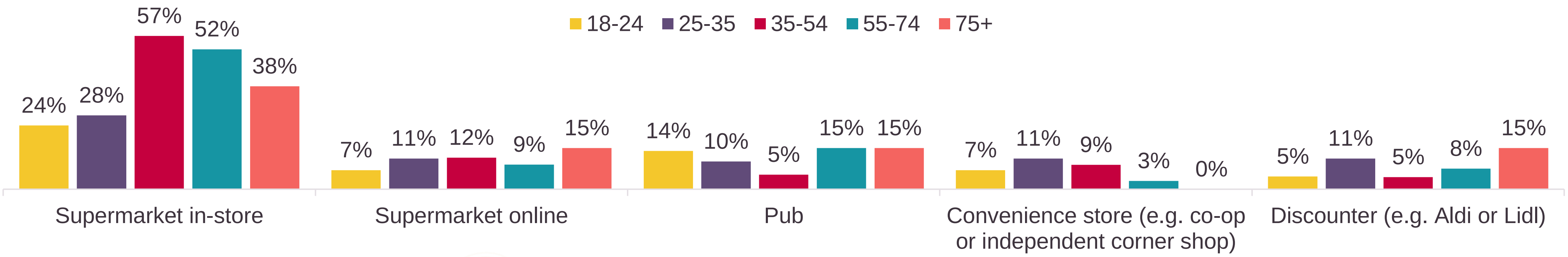
Source: Lumina Intelligence Low2No Bespoke Survey May 2021

SUPERMARKETS ARE THE MOST POPULAR PLACE TO BUY

Consumers purchasing Low2No regularly are most likely to buy it from a supermarket in-store (43%) with supermarket online the second most popular channel (11%). 1 in 10 purchase Low2No regularly in the on-trade (pubs) with those aged 55+ more likely to do so.

Where do you most regularly buy Low2No products?

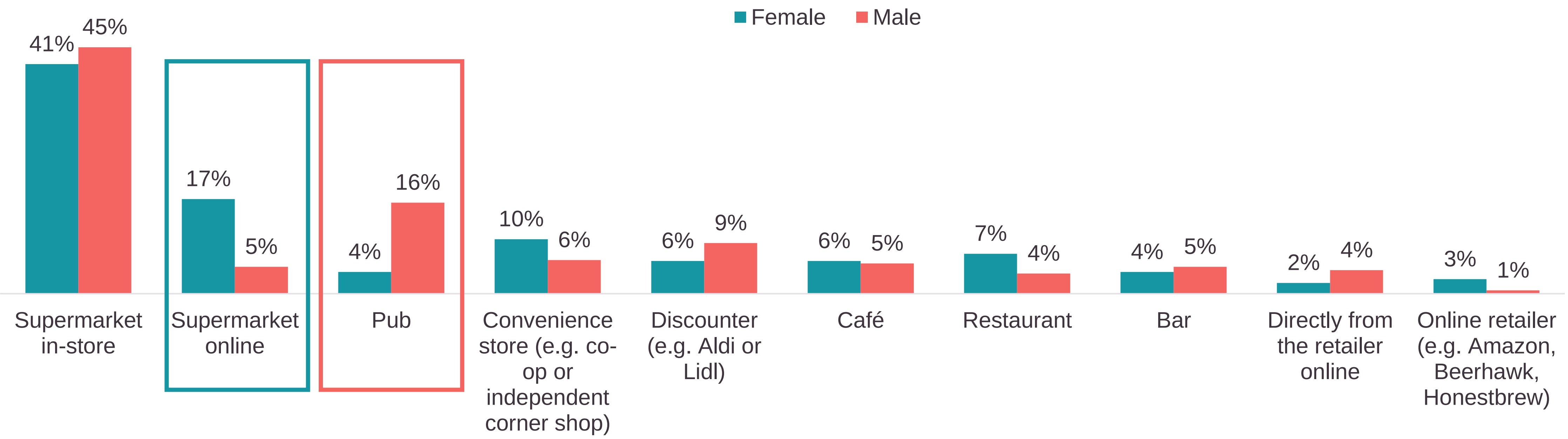




GENDER DIFFERENCES IN WHERE LOW2NO PURCHASED

The gender split for Low2No purchasing within supermarkets is broadly even but there are variances for Low2No bought in other locations. Women are more likely to purchase Low2No products online (17% vs. 5%), whereas men are more likely to purchase Low2No products in the Pub (16% vs. 4%).

Where do you most regularly buy Low2No products?

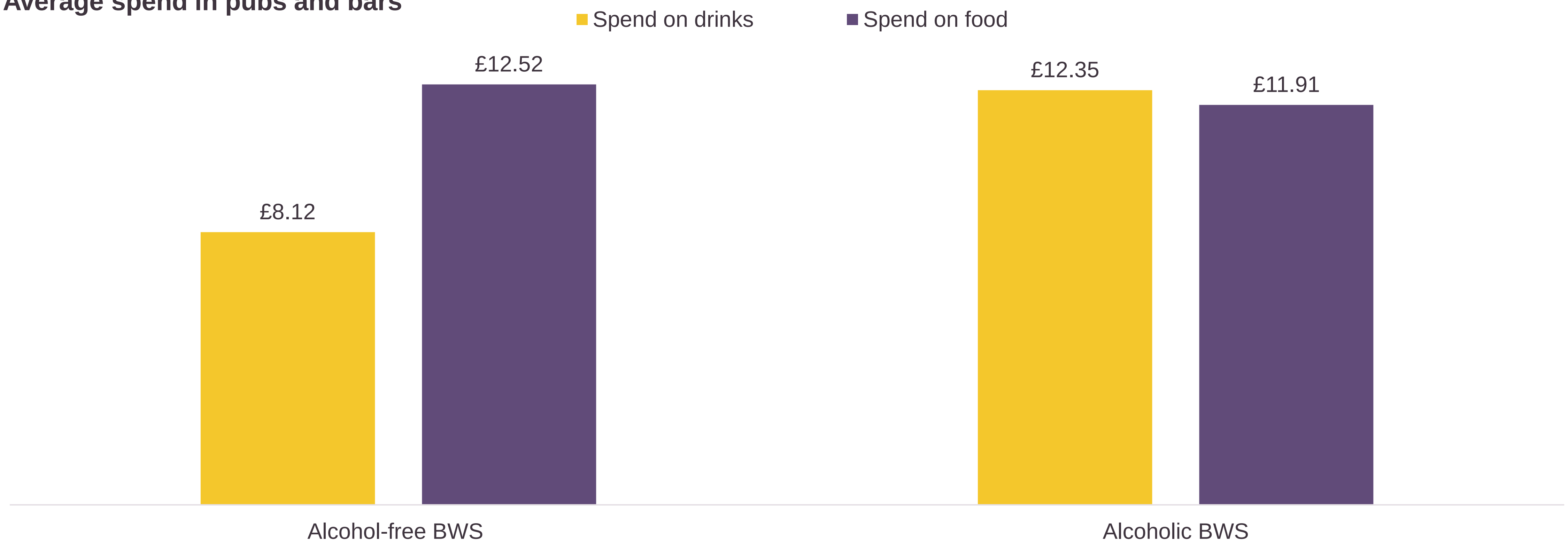


Source: Lumina Intelligence Low2No Bespoke Survey May 2021

NON-ALCOHOLIC DRINKERS SPENDING MOST ON FOOD

Consumers buying alcoholic-free beer/wines/spirits are spending significantly less on drinks but +5% more on food compared to alcoholic BWS drinkers. There is an opportunity to upsell in pubs and bars by including Low2No options as part of food offers.

Average spend in pubs and bars



Source: Lumina Intelligence Eating & Drinking Out Panel data collected 28WE 16/05/21

NON-ALCOHOLIC DRINKERS LESS SATISFIED WITH TASTE

Alcohol-free BWS drinkers are less satisfied on key metrics including food/drinks choice and drink quality/taste. These drinkers score lowest on ease of ordering which suggests they struggle to locate Low2No drinks on either menus or around the bar area.

Average satisfaction ratings (pubs and bars)

	Atmosphere	Cleanliness	Convenient	Drink quality/ taste	Ease of ordering	Food quality / taste	Food/drinks choice	Freshness	Friendly service	Packaging	Speed of service	Value for money
Alcohol-Free BWS	4.1	4.3	4.2	4.3	3.8	4.1	4.1	4.6	4.4	4.3	4.2	4.1
Alcoholic BWS	4.3	4.3	4.4	4.4	4.4	4.4	4.3	4.3	4.4	4.1	4.3	4.2

Source: Lumina Intelligence Eating & Drinking Out Panel data collected 28WE 16/05/21

Purchase motivations

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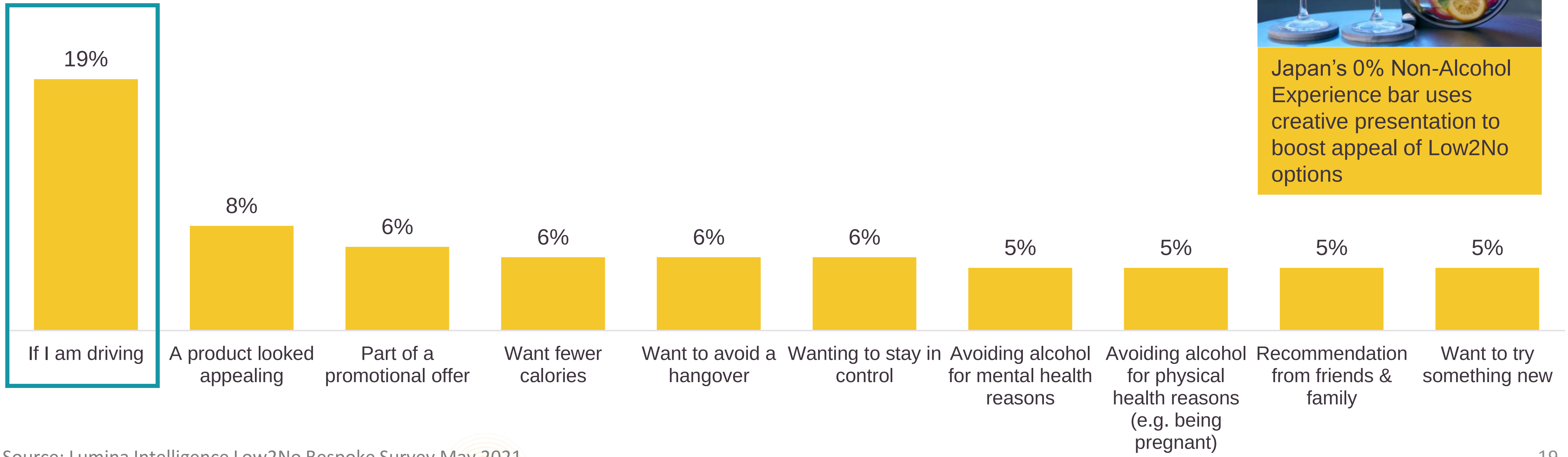
DRIVING IS MAIN MOTIVATION FOR BUYING LOW2NO ON TRADE

Driving is the main motivator for purchasing Low2no products in a pub, bar or restaurant, with 19% of consumers citing this reason. The next biggest driver for purchasing Lo2no in the on trade is if a product looked appealing – highlighting the importance of displays and packaging to attract attention.

What would motivate you to buy a Low2No product when you are in a Pub, Bar or Restaurant?



Japan's 0% Non-Alcohol Experience bar uses creative presentation to boost appeal of Low2No options

Source: Lumina Intelligence Low2No Bespoke Survey May 2021

DRIVING KEY MOTIVATOR ACROSS DEMOGRAPHICS

Driving is the main motivator for purchasing a Low2No product in a pub, bar or restaurant across several age groups. A number of brands are targeting designated drivers with product launches, such as Reids Gold Brewing Company Designated Driver 0.5% ABV (a low alcohol craft Pilsner) and non-alcoholic spirit, The Driver's Tipple, was also created by former British racing driver Hamish Gordon.

What would motivate you to buy a Low2No product when you are in a Pub, Bar or Restaurant?

18-24	25-34	35-54	55-74	75+
If I am driving (15%)	A product looked appealing (19%)	Wanting to stay in control (12%)	If I am driving (32%)	If I am driving (60%)
Want fewer calories (15%)	If I am driving (9%)	If I am driving (12%)	Want a healthier option (9%)	Wanting to stay in control (20%)
Want to avoid a hangover (10%)	Choice of well-known brands (9%)	Avoiding alcohol for physical health reasons (9%)	If there was a wide selection of choice (6%)	Other reason (20%)

The Driver's Tipple, non-alcoholic spirit

DRIVING IS LESS OF A MOTIVATOR FOR LOW2NO IN LONDON

London is the exception to the rest of the country, where product appeal is the primary motivator for Low2No products in the on-trade, reflective of lower car ownership (55% vs. 76% nationally*).

What would motivate you to buy a Low2No product when you are in a Pub, Bar or Restaurant?

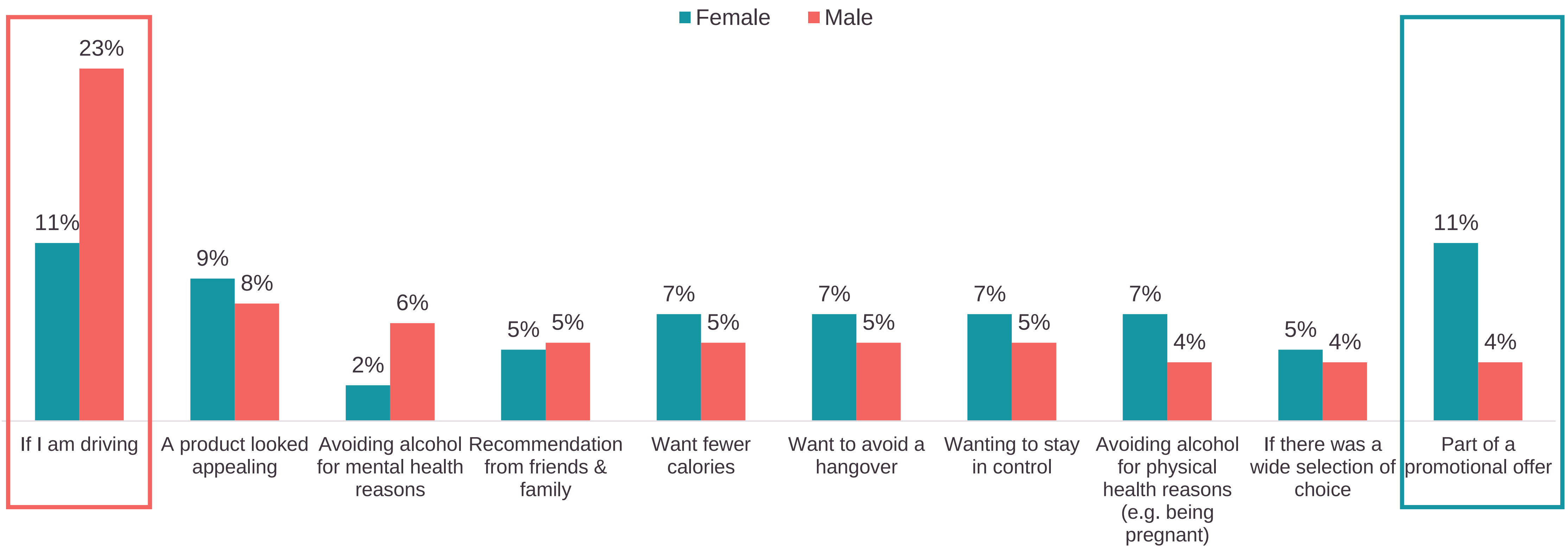
London	Midlands	North England	Northern Ireland	Scotland	South	Wales
A product looked appealing (19%)	If I am driving (12%)	If I am driving (22%)	If I am driving (50%)	If I am driving (21%)	If I am driving (21%)	If I am driving (40%)
If I am driving (11%)	Want a healthier option (12%)	A product looked appealing (8%)	Avoiding alcohol for physical health reasons (50%)	Avoiding alcohol for physical health reasons (11%)	Want fewer calories (11%)	A product looked appealing (20%)
Part of a promotional offer (11%)	Choice of well-known brands (12%)	Part of a promotional offer (8%)		Seeing it available on menus (11%)	A product looked appealing (5%)	Want fewer calories (20%)

Source: Lumina Intelligence Low2No Bespoke Survey May 2021. * National Travel Survey, Department for Transport (2018/19)

MEN MORE LIKELY TO BUY LOW2NO BECAUSE THEY ARE DRIVING

Male consumers are twice as likely as women to cite driving as the motivation for buying a Low2No product. Women are more likely to buy Low2No in the on-trade if it is part of a promotional offer, as well as for health/control reasons.

What would motivate you to buy a Low2No product when you are in a Pub, Bar or Restaurant?

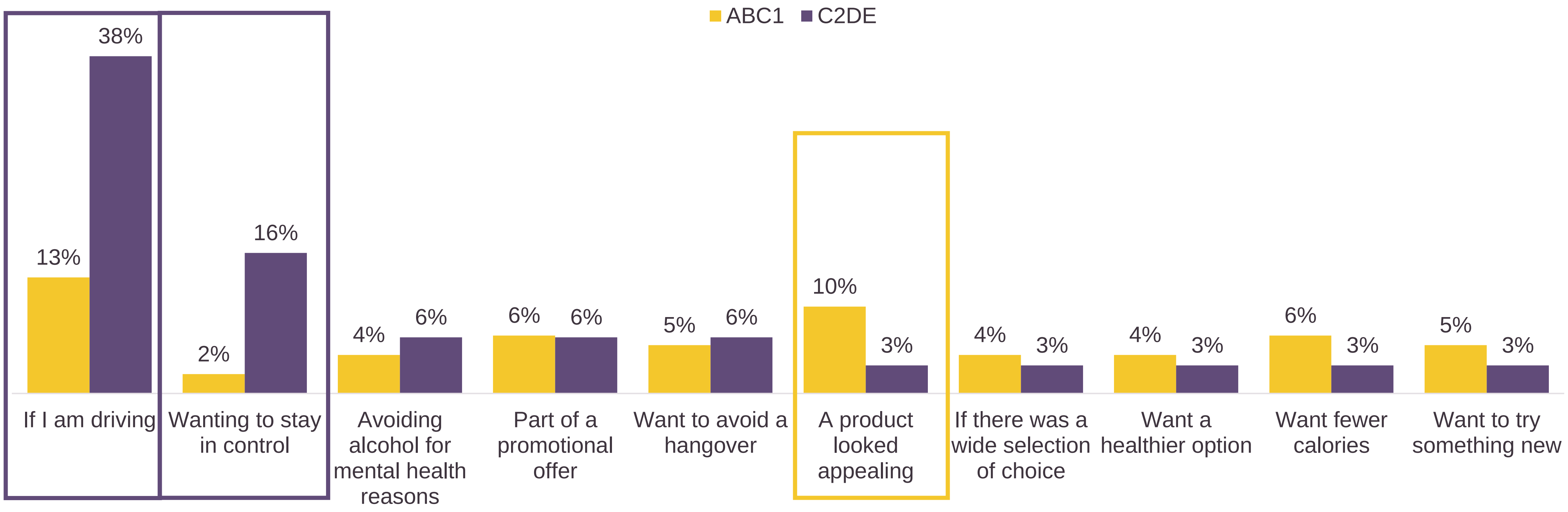


Source: Lumina Intelligence Low2No Bespoke Survey May 2021

C2DE'S ARE MORE LIKELY TO BUY LOW2NO IF DRIVING

Consumers from lower affluence groups are more likely to buy Low2No because they are driving than ABC1's. They are also more likely to opt for Low2No products because they want to stay in control. ABC1's are more likely to be motivated by product appeal.

What would motivate you to buy a Low2No product when you are in a Pub, Bar or Restaurant?

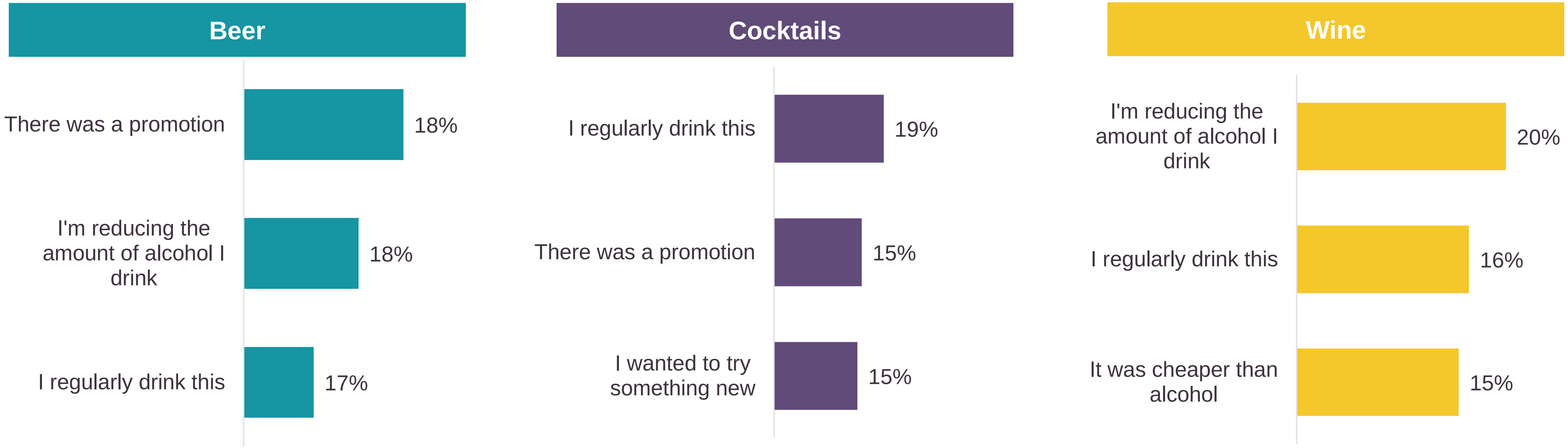


Source: Lumina Intelligence Low2No Bespoke Survey May 2021

PROMOTIONS MORE EFFECTIVE AMONGST BEER DRINKERS

Nearly a fifth (18%) of consumers purchased an alcoholic-free beer (on trade) because there was a promotion. Non-alcoholic wine drinkers are more price conscious with 15% purchasing because it was a cheaper option.

Top 3 reasons for purchasing alcoholic-free beer vs. wine vs. cocktails (on trade)

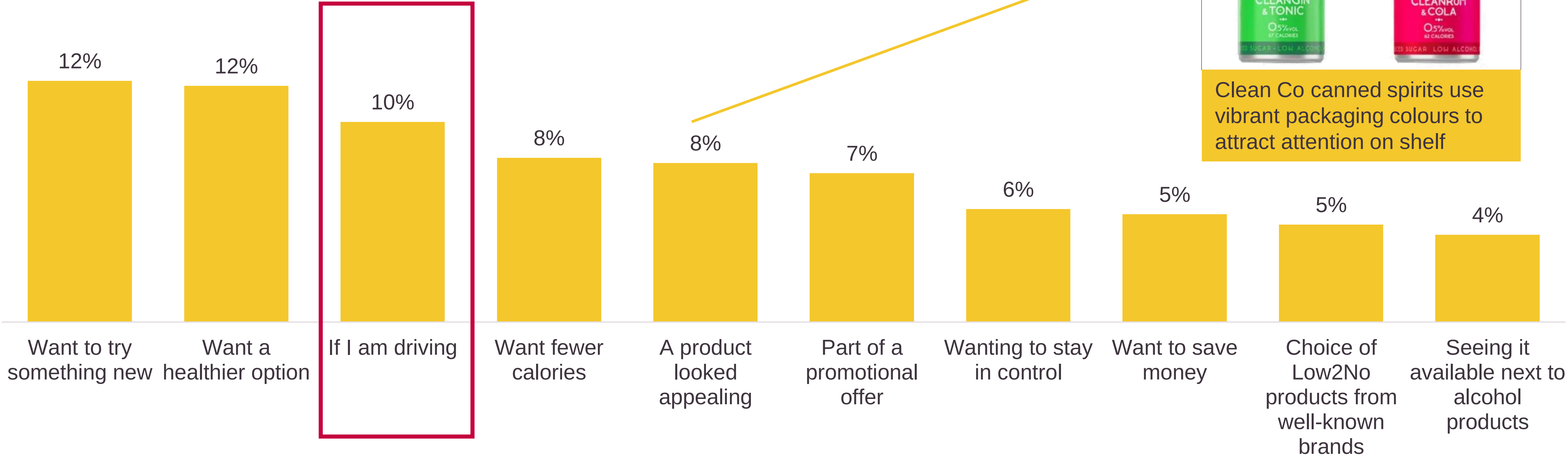


Source: Lumina Intelligence Eating & Drinking Out Panel data collected 28WE 16/05/21

OFF TRADE, CONSUMERS WANT TO TRY HEALTHY, NEW OPTIONS

Primary motivations for buying Low2No in the off-trade are a desire to try something new and wanting a healthier option. Driving is a lower priority than in the on-trade (10% vs. 19%).

What would motivate you to buy a Low2No product when you are in a Supermarket, Convenience Store or Discounter?



Clean Co canned spirits use vibrant packaging colours to attract attention on shelf

Source: Lumina Intelligence Low2No Bespoke Survey May 2021

OLDER CONSUMERS ARE MORE CONCERNED ABOUT HEALTH

Younger consumers are more motivated by product appeal and a desire for something new, as well as health motivations, whilst driving is the primary consideration for consumers aged 75+.

What would motivate you to buy a Low2No product when you are in a Supermarket, Convenience Store or Discounter?

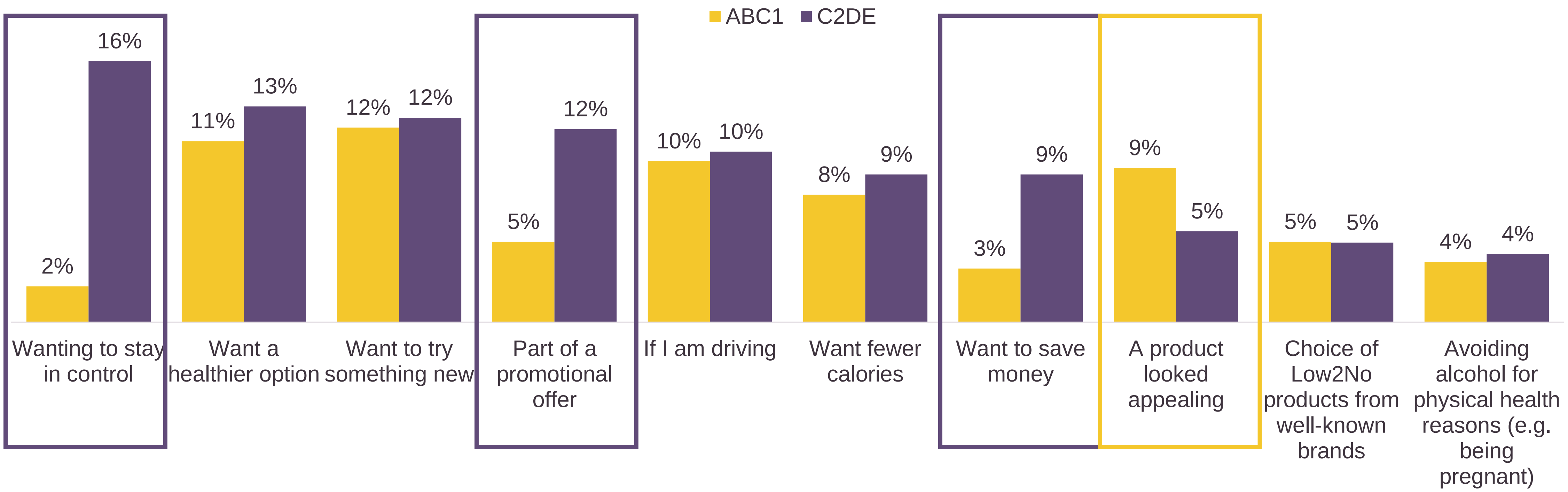
18-24	25-35	35-54	55-74	75+
A product looked appealing (18%)	Want to try something new (13%)	Want to try something new (12%)	Want a healthier option (21%)	If I am driving (27%)
Want a healthier option (15%)	Want fewer calories (9%)	If I am driving (10%)	If I am driving (14%)	Want fewer calories (27%)
Want to save money (9%)	Part of a promotional offer (9%)	A product looked appealing (10%)	Want to try something new (13%)	Recommendation from friends & family (18%)

Source: Lumina Intelligence Low2No Bespoke Survey May 2021

C2DES WANT TO STAY IN CONTROL – AND SAVE MONEY

C2DE consumers show a great desire to stay in control as a reason for choosing a Low2No product. They are also more likely to be driven by promotions and saving money, whereas ABC1's are more motivated by product appeal.

What would motivate you to buy a Low2No product when you are in a Supermarket, Convenience Store or Discounter?



Source: Lumina Intelligence Low2No Bespoke Survey May 2021

HOW TO DRIVE THE LOW2NO SHOPPER INTO C-STORES

Convenience is a key channel for Low2No products. Taking convenience stores as an example, developing a channel specific shopper strategy will drive increased frequency to the category.

Top 3 drivers to purchasing Low 2 No BWS in convenience stores

Driving this shopper in-store:

1.) **Clear merchandising**, **POS** and **packaging**, so shoppers can **easily navigate** to the category in store and easily identify new products through **informative POS** and packaging.

2.) **Older shoppers** (65+) are the **most brand driven** (+3%) demographic when purchasing Low2No. 65+ purchase wine the most, so ensure that there is a wide brand selection of **Low2No wine brand alternatives** to increase frequency of purchase in stores where there is a higher older demographic, such as **non-urban locations.**

3.) Low2No shoppers **value recommendations from store assistants** more than hard seltzer shoppers. Equipping staff with **category knowledge** which they can share with shoppers will be an effective way to engage this shopper.

Source: Lumina Intelligence BWS Bespoke Survey

Barriers to Purchase

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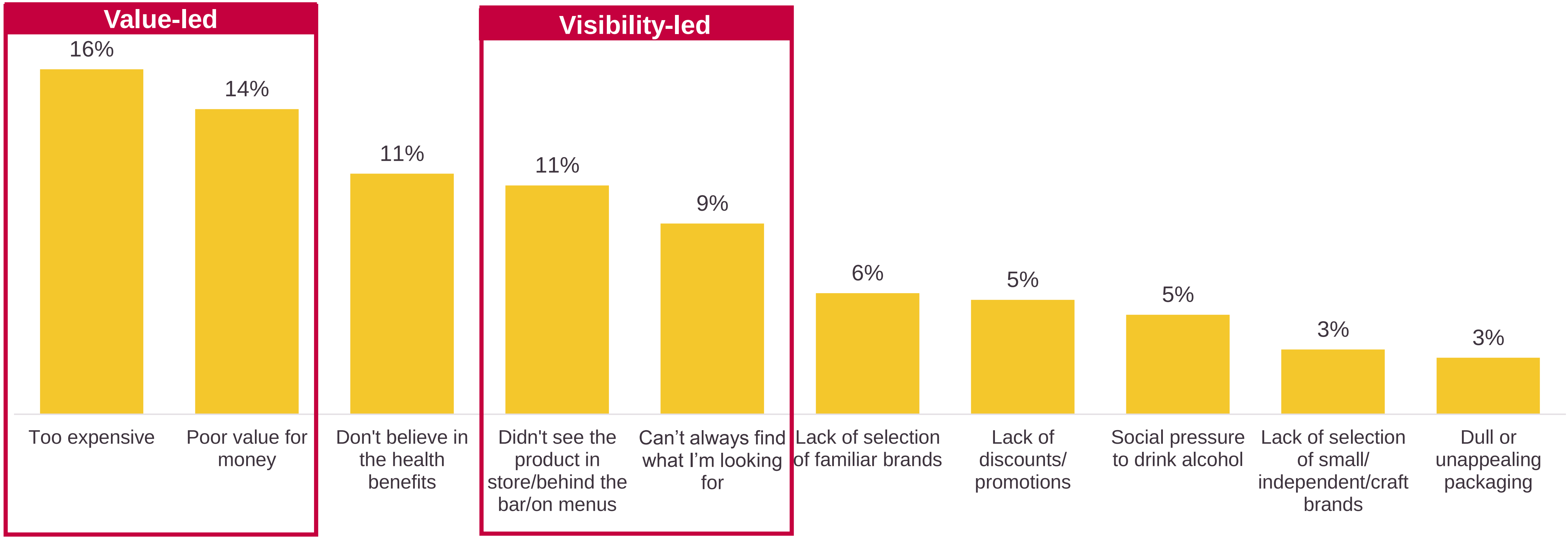
Lumina Intelligence

COST IS A KEY BARRIER TO PURCHASING LOW2NO

Across both on and off trade, the cost of Low2No products and its perceived poor value for money are the two key barriers to purchasing Low2No products more often. Category exposure is a barrier too, as 11% fail to see the product in store/on menus/behind the bar and 9% can't find what they are looking for.

What prevents you from buying Low2No products more often?



Source: Lumina Intelligence Low2No Bespoke Survey May 2021

25-34'S CITE NOT BEING ABLE TO FIND LOW2NO PRODUCTS

Whilst cost is the main barrier across all age groups, 25-34's are more likely to say that not seeing the product in-store (16%) prevents them from purchasing Low2No products more often.

What prevents you from buying Low2No products more often?

18-24	25-34	35-54	55-74	75+
Too expensive (13%)	Didn't see the product in store (16%)	Too expensive (17%)	Poor value for money (18%)	Poor value for money (22%)
Didn't see the product in store (13%)	Too expensive (14%)	Poor value for money (13%)	Too expensive (18%)	Don't believe in the health benefits (17%)
Can't always find what I'm looking for (13%)	Can't always find what I'm looking for (11%)	Didn't see the product in store (11%)	Don't believe in the health benefits (14%)	Too expensive (12%)

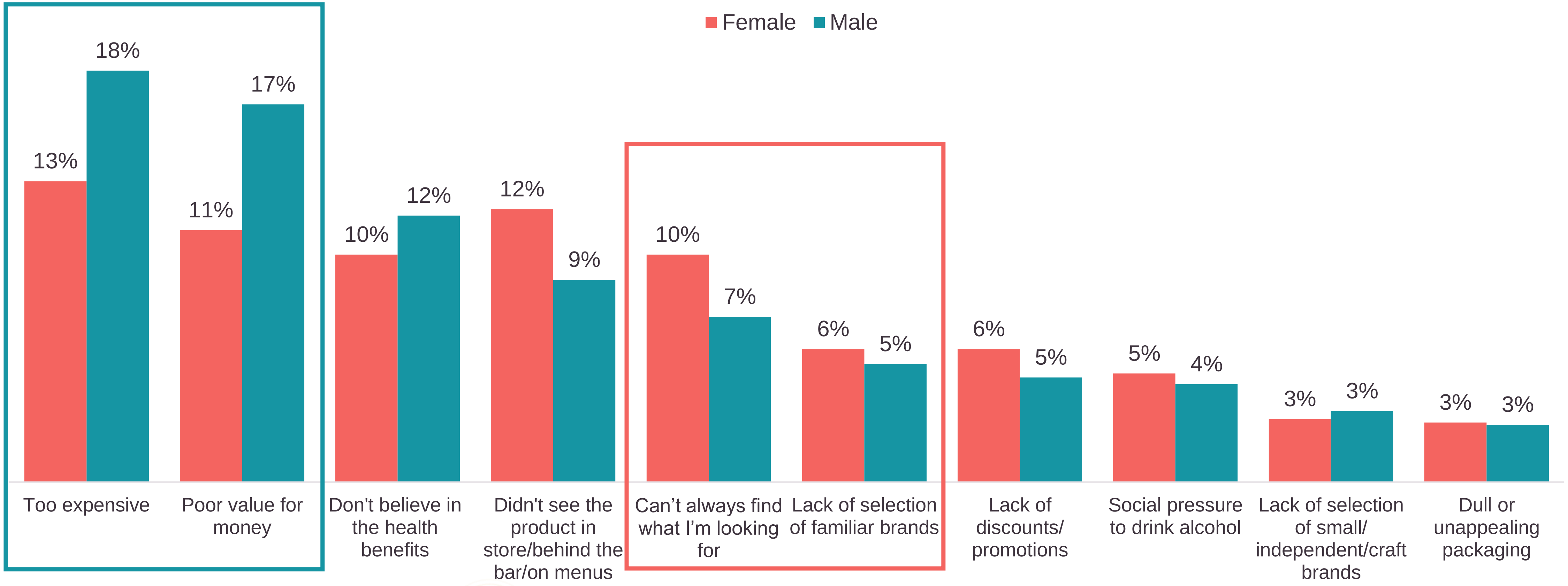
Older consumers (55+) are more sceptical about the perceived health benefits of Low2No products, with 17% not believing in the health claims.

Source: Lumina Intelligence Low2No Bespoke Survey May 2021

MEN ARE MORE CONCERNED ABOUT COST

Men are more likely to perceive Low2No as too expensive or poor value for money. They are also more likely to be cynical about the health benefits. Women, meanwhile, are less likely to find the category or what they are specifically looking for.

What prevents you from buying Low2No products more often?



Source: Lumina Intelligence Low2No Bespoke Survey May 2021

Case Studies & Interviews

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LOW2NO BEV SHOW HIGHLIGHTS, CLEANCO

CleanCo - founded in 2019 and backed by Made In Chelsea’s Spencer Matthews and Justin Hicklin - participated in the Low2No bev show by preparing theatrical cocktails made with their alcohol-free spirits.

KEY FEATURES:

- Wide variety of non-alcoholic spirits
- Offer pre-mixed cocktails in cans
- Offered an entire menu of clean cocktails for consumers to try

Lumina Intelligence comment: CleanCo offered samples of their non-alcoholic spirits, as well as a list of clean cocktails. Advocating for sober living, the cocktails showed an alternative product that will make consumers visually fit in with their peers while staying sober.

Source: Lumina Intelligence, June 2021

LOW2NO BEV SHOW HIGHLIGHTS, FUNGTN

Fungtn is the UK's first mycoadaptogenic alcohol free craft beer. Founded by Zoey Handerson, Fungt aims at creating a beer that is non-alcoholic, good tasting, and offers health benefits to the consumer.

KEY FEATURES:

- Four craft beers: Chaga Lager, Lion’s mane IPA, Reishi Citra Beer and a Special Run Turkey Tail Pale Ale
- Made using medical mushrooms that offer natural health benefits
- Gluten-free and vegan

Lumina Intelligence comment: Fungtn is one of the leading examples of the exciting and continuous innovation that characterises the Low2No category. Zoey Handerson is an advocate for the functionality of drinks and drinks that offer extra health benefits to consumers.

LOW2NO BEV SHOW HIGHLIGHTS, INTUNE

Intune is a CBD infused drink company that aims at introducing consumers to the health benefits of CBD through their high-quality drinks.

KEY FEATURES:

- Three main flavours: Grapefruit & Mint, Elderflower & Hops and Pomegranate & Ginger
- 10 mg Active CBD from quality hemp that's grown naturally, outdoors
- Also sell CBD mixers for cocktails, with 5mg CBD
- Botanical and fruit extracts from actual fruits and herbs with minimal intervention

Lumina Intelligence comment: Aiming at creating a future where more people can find focus in an increasingly overstimulated world, Intune offers all the health benefits of CBD in a delicious Low2No drink. Intune represent another example of the expanding variety of sub-categories and trends within the Low2No drinks industry.

Source: Lumina Intelligence, June 2021

CASE STUDY: CLEANCO

CleanCo (previously CleanLiqor) was started in 2019, backed by Made In Chelsea's Spencer Matthews and Justin Hicklin. The range currently comprises low-alcohol alternatives to gin, vodka, tequila and rum, including ready-to-drink variants.

Why do you think there is so much interest in Low2No?
"It's a healthier option; lots of people want to reduce their alcohol consumption, especially mid-week. Some people don't want to stand out when they're choosing not to drink – and CleanCo looks and smells like the real thing"

Do you think there is still headroom in Low2No?
"We believe moderation will become a mainstream movement, currently it is quite niche. It is attitudinal rather than age-defined. We see huge headroom as Low2No is relatively unknown outside of London. The category is catching the attention of the retailers. Currently Sainsbury's are leading and giving Low2No more space."

Do you think the price of Low2No spirits is an issue?
"Not really because consumers appreciate the quality of the drink. Also we're seeing more of a spectrum of price points as more products launch into the Low2No spirits sector, especially as own labels are now coming through."

There's lots of interest in the Low2No category, how do you think it will play out?
"The category is going to get crowded – there are lots of interested parties! But consequently it does feel more and more like a category, with more of a range available."

Source: Lumina Intelligence, June 2021

CASE STUDY: SMALL BEER CO

Small Beer Co was launched in 2017 and claims to be the world's first brewery entirely dedicated to low alcohol beer. The business seeks to "reinterpret the small beer category, with a modern twist".

What's been your biggest success?
"The way our small business was built is the key to our success. It is good for the environment, uses twice the amount of ingredient to generate more flavour, has no contract brewing, as well as being authentic and planet friendly. Low2No attracts people who care about the process - with customers more inclined to ask questions - and our process is the key to our success."

What do you see as the biggest opportunity for the future?
"The category previously struggled due to visibility, however it will grow as consumers discover and show interest in it. People want freedom to choose, especially after a year of restrictions. Low is the best of both worlds."

What are the most significant challenges in the Low2No category?
"The biggest barrier is the price point. Low ABV beverages cost the same as full alcoholic ones. Beer has always had sensitivity to low to high ABVs and this is why beer is at the front of this. The price point to experiment is so much lower. Bad taste is also a big barrier. Customers are trying bad examples and are being put off. We need more examples that taste good and more big brands to make room."

Source: Lumina Intelligence, June 2021

CASE STUDY: TREASURY WINE ESTATE

Treasury Wine Estate have launched a range of Low2No alcohol wines under their Lindeman's brand. The range comprises a chardonnay, a cabernet sauvignon and a sparkling pinot noir/muscat, all 0.5% abv.

Is Lo2No an important part of your future growth strategy?
"As consumers are becoming more conscious of their eating and drinking habits, the popularity of low and no alcohol wines has risen dramatically. This is definitely a category that can no longer be overlooked or ignored and will continue to be an important focus. Its success is mainly being driven by younger shoppers who are consciously making an effort to reduce their alcohol intake."

What have been your biggest challenges?
"Taste & delivery of the product is a key challenge for no alcohol wines, we know drinkers want to enjoy lower alcohol, or alcohol-free products in the same way, & at the same occasions, as those drinking alcohol and have expectations around the delivery of these products. This is something that we are still working to continually to improve."

What are your predictions for the future of the Low2No category?
"Low & No alcohol products will continue to be an important part of the category as these products become a more regular part of a drinkers' repertoire and the offer expands. Awareness remains key, with channels such as the on-trade increasing their low & no alcohol offer."

Source: Lumina Intelligence, June 2021

METHODOLOGY

Lumina Intelligence Low2No Bespoke Survey

- Online interviews with consumers
- 1,000 nationally representative sample
- Data collection period: 4 w/e 16/05/21

Lumina Intelligence Eating & Drinking Out Panel

- Tracks the behaviour of 1,500 nationally-representative consumers each week, building up to a sample of 78,000 across the year
- Covers all eating channels and day-parts (including snacking)
- Data collection period: 28 w/e 16/05/21

Lumina intelligence BWS Bespoke Survey

- Online interviews with consumers
- 1,536 nationally representative sample
- Data collection period: 12/11/20 – 17/12/20

OUR CORONAVIRUS LABELLING

Pre Coronavirus

Pre-2020

Pre Coronavirus Uncertainty

January-February 2020
At this time little had happened in the UK and Europe regarding the outbreak.

Peak Coronavirus Lockdown

Mar-May 2020 (I)
Nov 2020 (II)
Dec-Mar 2021 (III)
The height of the pandemic. Government intervention led to widespread home working, school closures and reduced public transport. Public encouraged to avoid non-essential travel and implement social distancing.

Post Lockdown

May-Nov 2020 (I)
Nov-Dec 2020 (II)
Apr 2021-present (III)
Intermittent periods of time directly following Lockdown I-III.
This is predicted to be a minimum period of six months with continuing risk aversion mindsets.

Recessionary Impact

Future (months)
Period when the UK feels the economic impact that the virus will leave. This period is set to be defined by cautionary consumer spending and notable operator causalities.

Market Recovery Adjusted Normality

Future (years)
Expected to be in around 3-5 years. The competitive landscape of the food and drink market will be very different, with Lumina Intelligence expecting some lasting legacies from both consumers and operators going forward.

Source Lumina Intelligence

THE TRUSTED SOURCE FOR FOOD, DRINK AND NUTRITION MARKET INSIGHT SOLUTIONS

The experts in market and consumer insight across the food, drink and nutrition markets

Deep actionable insights, powered by the world's best analytics technology

Every measure of consumer and shopper behaviour, from planning a shop to choosing where to eat or drink

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Lumina Intelligence is the new name and new solution from HIM and MCA Insight

Get in touch

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