Pulse Update

Data collected w/c 5th October 2020

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KEY MESSAGES

Online grocery grows share across all meal occasions

Grocery delivery has grown share across all meal occasions this week. Almost a fifth (19.9%) of breakfast meal occasions this week were from online grocery delivery. This is the one of the highest shares for the meal occasion yet and serves to show that grocery delivery is one of the lasting legacies of the Coronavirus pandemic.

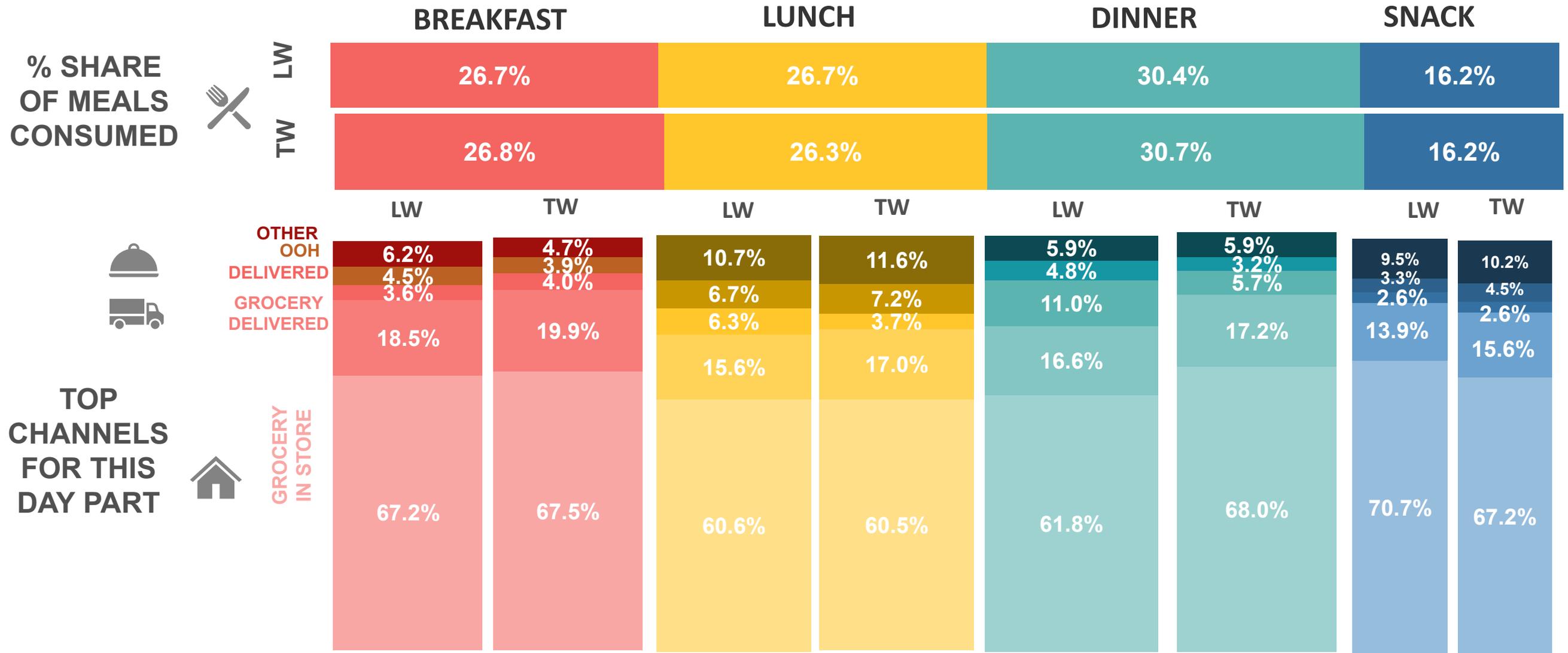## Friendly staff declines as a need

Friendly and helpful staff has decreased as a need across all four meal occasions this week. We saw a similar pattern during the height of the Coronavirus lockdown as shoppers prioritised getting in and out of stores as quickly as possibly. With stricter regional lockdowns looming, shoppers are once again placing less importance on friendly and helpful staff.

Cafés/coffee shops record lowest channel opportunity yet

Cafés/coffee shops have consistently been the only hospitality channel to record a positive channel opportunity since the sector could re-open on 4th July. However this week, +5% marks the lowest recorded opportunity yet for the channel and highlights the impact the current climate is having on all channels in hospitality – all 3 other channels remain in a negative channel swing.

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CHANNEL PULSE: OVERVIEW

		BREAKFAST	LUNCH	DINNER	SNACK
% SHARE OF MEALS CONSUMED	LW	26.7%	26.7%	30.4%	16.2%
	TW	26.8%	26.3%	30.7%	16.2%

	BREAKFAST LW	BREAKFAST TW	LUNCH LW	LUNCH TW	DINNER LW	DINNER TW	SNACK LW	SNACK TW
OTHER	6.2%	4.7%	10.7%	11.6%	5.9%	5.9%	9.5%	10.2%
OOH	4.5%	3.9%	6.7%	7.2%	4.8%	3.2%	3.3%	4.5%
DELIVERED	3.6%	4.0%	6.3%	3.7%	11.0%	5.7%	2.6%	2.6%
GROCERY DELIVERED	18.5%	19.9%	15.6%	17.0%	16.6%	17.2%	13.9%	15.6%
GROCERY IN STORE	67.2%	67.5%	60.6%	60.5%	61.8%	68.0%	70.7%	67.2%

TOP CHANNELS FOR THIS DAY PART

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CHANNEL PULSE: OVERVIEW

		BREAKFAST	LUNCH	DINNER	SNACK
% SHARE OF MEALS CONSUMED	LW	26.7%	26.7%	30.4%	16.2%
	TW	26.8%	26.3%	30.7%	16.2%
TOP NEEDS FOR THIS DAY PART — IN HOME	1	Familiarity (35%)	Familiarity (33%)	Familiarity (41%)	Familiarity (19%)
	2	Prices (27%)	Prices (27%)	Prices (33%)	Prices (19%)
	3	Quality (22%)	Quality (23%)	Quality (28%)	Choice (13%)
CHANGING NEEDS FOR THIS DAY PART — IN HOME	1	Quality (+2pp)	Quality (+1pp)	Familiarity (+3pp)	Prices (+2pp)
	2	Confidence (+1pp)	Confidence (-1pp)	Confidence (+2pp)	Proximity (-2pp)
	3	Friendly/helpful staff (-2pp)	Friendly/helpful staff (-2pp)	Friendly/helpful staff (-1pp)	Friendly/helpful staff (-1pp)

NB: Sold Out/Shut = "My usual place was sold out or closed"
Confidence = "I knew they would have what I want"
Familiarity = "It's where I always go"

Source: Channel Pulse data collected w/c 28/09

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CHANNEL PULSE: CRYSTAL BALL

- Supermarkets, discounters and convenience stores (in that order) are the top 3 channels which consumers say they think they will visit more of in the coming week.

- This notes a shift as discounters overtake c-stores to second place. This last happened in w/c 24/08 and suggests that shoppers are seeking value as they feel the pinch on wallets.

- In hospitality, 3 out of the 4 channels remain in a negative swing. Cafés and coffee shops have been the only hospitality channel to consistently uphold a positive channel opportunity but this week the channel has recorded its lowest opportunity yet since hospitality reopened on 4th July.

- With the announcement of a new three tier Covid alert system in the UK, consumers are undoubtedly hesitant about going to hospitality establishments with so much uncertainty. In the highest alert level, pubs and bars will only be allowed to stay open if they operate as a restaurant.

Predicted Channel Opportunity
Do you think you will visit/use the following channels more, less, or the same in the next week? (Index calculation = More + Same, - Less)

Channel	Value
Convenience Stores	55%
Supermarkets	75%
Online supermarkets	53%
Food delivery/takeaway	37%
Discounters	57%
Recipe boxes	16%
Restaurants	-6%
Pubs	-13%
Bars	-18%
Cafés and coffee shops	5%

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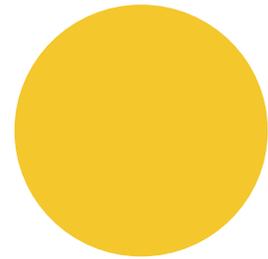
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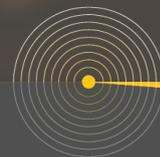
OUR CORONAVIRUS LABELLING

Pre Coronavirus

Pre-2020
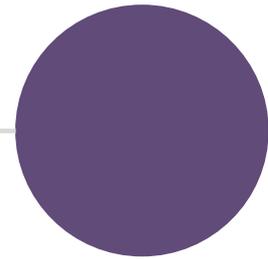
Pre Coronavirus Uncertainty

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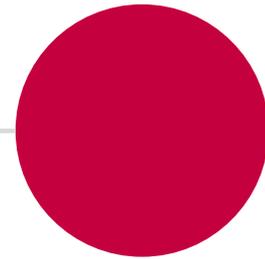
Peak Coronavirus Quarantine

March-May 2020
The height of the pandemic for the majority of Europe. Government intervention led to widespread home working, school closures and reduced public transport. Public encouraged to avoid non-essential travel and implement social distancing.
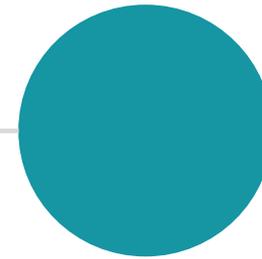
Post Quarantine

Now
The time period following full quarantine. This is predicted to be a minimum period of six months with continuing risk aversion mindsets.
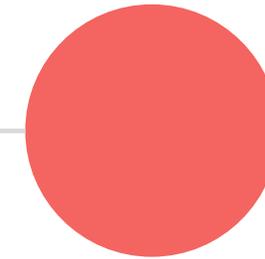
Recessionary Impact

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.
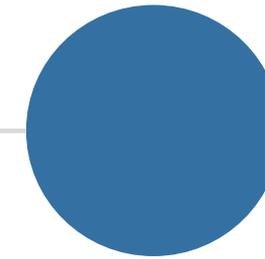
Market Recovery Adjusted Normality

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.

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METHODOLOGY

The Channel Pulse methodology is built up from three sections, comprised of online feedback with a nationally representative sample of 1000 participants every week

1) Meal Share: Consumption in the last 24 hours

% Share of Meals	Consumption Location	Purchase Location	Retailer/Operator	? Needs & Motivations

2) Channel Detail: Channel penetration in the last 7 days

% Channel Penetration	Retailer/Operator	Visit Frequency	Purchases	? Mission

3) Topical Content And Subject Deep Dives

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BESPOKE ANALYSIS CAPABILITIES

Using our **wealth of data**, **channel expertise** and **advance analysis tools** our consultants can **produce tailored outputs**, **exclusively for you**, in order to quickly react and answer your critical **key business questions**. We will be able to contextualise these trends through our existing out of home and retail trackers providing a historical perspective.

EXAMPLE QUESTIONS WE CAN ANSWER
Adaptable to be applicable for whether you're a **supplier**, **retailer** or **operator**

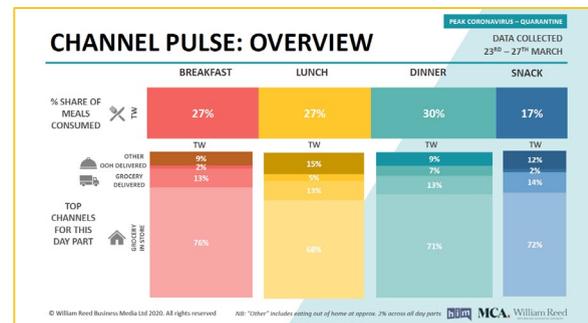|	
Who are your opportunity consumers and how can you connect with them?	How does your offer need to change by day-part and season?
Which channels are missed opportunities and how can you break into them?	How can you maximise foodservice & retail for your category?
How can you drive incremental visits, increased spend and loyalty'	What is your category penetration and how can you grow your category?

DELIVERABLE OPTIONS

Data tables

Dashboards

CHANNEL PULSE: OVERVIEW

Reports

REPORT TO UNDERSTAND THE KEY OPPORTUNITIES WITH YOUR TARGET AUDIENCE ACROSS DIFFERENT CHANNELS

APRIL 2020

Presentations & workshops

Lumina Intelligence

Get in touch

For further information about this report please contact:

Holly.franklin@lumina-intelligence.com

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