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**41% of consumers agree on the efficacy of HFSS legislation**

According to data from Lumina Intelligence, consumers remain divided on the potential impact of HFSS legislation on unhealthy eating habits.

When asked if they believe HFSS legislation will help fight unhealthy eating, consumers answered the following\*:

|  |  |
| --- | --- |
| Agree | 41% |
| Neither agree, nor disagree | 25% |
| Disagree | 30% |
| Don’t know | 3% |

Four-in-ten (41%) consumers agree on the efficacy of HFSS overall. Despite this, 55% of those who agree on its efficacy will still purchase HFSS products.

**57% will continue to buy when not on promotion\***

With HFSS set to impact the majority of promotions around HFSS products, we asked consumers if they would continue to purchase HFSS products if they weren’t on promotion. Here is how they responded:

|  |  |
| --- | --- |
| Agree  | 57% |
| Neither agree, nor disagree | 27% |
| Disagree | 12% |
| Don’t know | 3% |

Shoppers remain relatively unfazed by a decline in promotional activity, with just 12% indicating that they would not purchase HFSS products if they were not on promotion.

**HFSS location restrictions could impact 46% of Confectionery, Crisps and Snacks, and Soft Drink purchases in convenience\*\***

46% of HFSS products purchased in convenience are picked up from locations set to be restricted under HFSS legislation. The breakdown of where HFSS products are picked up from is (areas set to be restricted highlighted in yellow):

|  |  |
| --- | --- |
| On the main product shelf | 44% |
| Display on the end of an aisle | 23% |
| Display at the front of the store | 11% |
| Display at the till | 9% |
| Free standing displays around the store | 5% |
| Display within the queue system | 3% |
| Don't know / Don't remember | 2% |
| Other | 2% |

Confectionery is at most risk with 50% of purchases made in HFSS restricted locations. The category over-indexes in key risk locations: display at the front of the store, display at the till, and display within the queue system. Soft drinks purchases are least impacted with 44% bought in restricted locations, however the category significantly over-indexes (+4 ppts) in aisle end purchases.

**HFSS volume restrictions could impact 32% of Confectionery, Crisps and Snacks, and Soft Drink purchase in convenience\*\***

For stores impacted, increasing non-volume offers and introducing new promotional deals will be essential as 32% of HFSS category purchases in convenience are made on multi-buy and buy one get one free promotions. Here is the breakdown of HFSS purchases by promotion type (areas set to be restricted highlighted in yellow):

|  |  |
| --- | --- |
| Percentage off, e.g. 20% off | 21% |
| Multi-buy, e.g. buy two for one, buy two for £5 | 20% |
| Meal deal | 16% |
| Buy one get one free | 11% |
| Bundle deal, e.g. beer & pizza for £10 | 1% |

Commenting on the findings, Blonnie Whist, Insight Director at Lumina Intelligence said, *“HFSS regulations continue to divide both consumers and businesses. Whilst most think that action is necessary, many believe that the current legislation will be ineffective. Just four-in-ten consumers believe the legislation will be effective in tackling unhealthy eating. This is evident with the majority of consumers indicating that they will continue to purchase HFSS products despite restricted promotions.”*

*“Although consumer appetite for HFSS products remains, retailers are going to have to think hard about merchandising and promotions. Nearly half of all HFSS products purchased are picked up from areas set to be restricted and 32% are purchased as part of promotions set to be restricted.”*

**ENDS**

**Report methodology**

* \*Lumina Intelligence Channel Pulse, September 2021 – survey of 1,000 consumers
* \*\* Lumina Intelligence Convenience Tracking Programme; Total HFSS = Confectionery, Crisps and Snacks, and Soft Drinks

**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.

With offices in London, Chicago, Montpellier, and Singapore, and local on the ground analysts across our businesses, 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.

Combining the expertise and experience of HIM, MCA Insight and Lumina Intelligence, we are the experts in market and consumer insight across the food & drink and nutrition markets.

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