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Consumer food-to-go & foodservice purchasing and consumption behaviour

Latest data:

52 & 12 weeks ending 31 October 2022 (wave 107)

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Headline figures

52 & 12 weeks ending 31 October 2022 (wave 107)

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	52 w/e YOY change	12 w/e YOY change
Total out of home GB occasions	+15%	+4%
Total out of home GB Value	+30%	+12%

- Occasions growth is up slightly vs. the last release (+4% vs +1% in 12 w/e 3 October 2022)
- Inflation will be a significant contributor in value growth

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Headline performance by sub-channel Occasions

12 w/e 31 October 2022 (wave 107) vs. 12 w/e a year ago

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- **Total FTG & 'out of home' (+4% YonY)**
  - **Total food to go +3%**
    - Total supermarkets / multiples +24%
    - Total convenience stores (excl mults) +7%
    - Total discounters +6%
    - Total sandwich shops & specialist FTG -5%
    - Total coffee shops and cafes +2%
    - Total fast food and takeaway -10%
    - Other
      - Total high street -22%
      - Total transportation -2%
      - Total forecourts (excl mults) +9%
      - Total workplace vending / mobile and street food +40%
  - **Total eating out +8%**
    - Total pubs +37%
    - Total restaurants -10%
    - Total hotels -11%

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Summary – latest 12 w/e (31 October 2022)

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- Value growth (+12%) continues to outpace occasions growth (+4%) in 12 w/e 31 October 2022 vs year ago

- ‘Eating out’ (+8%) continues to outperform ‘food-to-go’ (+3%) in the latest 12 weeks, driven by pubs (+37%).

- While the number of food-to-go occasions has remained fairly static (+3%), sub-channel performance varies significantly, with retail outlets (mainly supermarkets) outperforming traditional food-to-go outlets

- Unsurprisingly, the mission ‘something inexpensive’ continues to increase in importance , whilst ‘treat’ remains in decline. It also appears consumers do not want to take risks with their choices as ‘regular favourite’ continues to be in growth, whilst ‘something a bit difference’ declines. ‘Something hot’ has seen growth this period despite continued mild weather.

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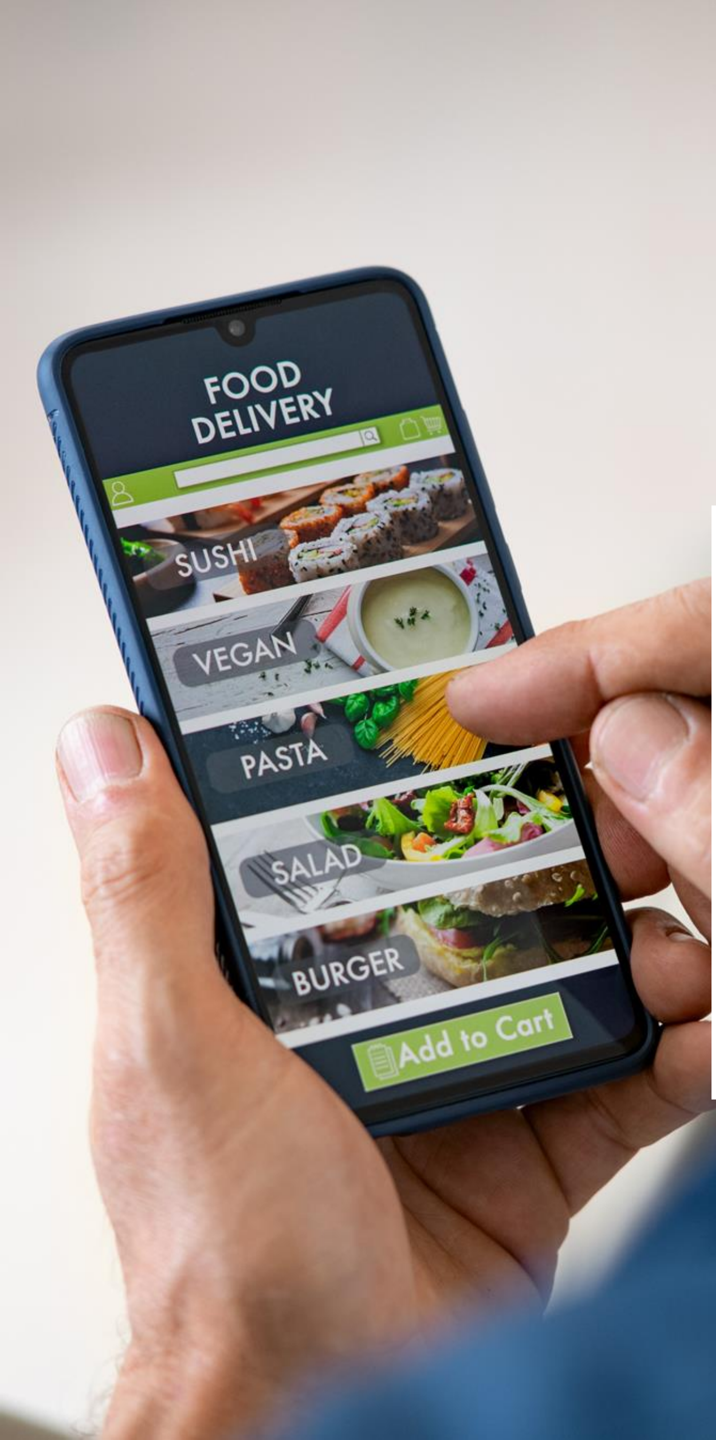

Unlocking Opportunities in food-to-go

- Understanding channel and category mix to identify gaps and opportunities
- Understanding shoppers & missions to create targeted solutions

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Introducing MealTrak

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- Launched in 2014 – **8 years of trended data available**
- **Robust** – interviews with 36,500 consumers each year (interviews conducted on most days of the year). Nat-rep (Total GB)
- **Comprehensive and granular** – covers a wide range of food-to-go/out-of-home eating sub-sectors and 150 named retail brands, 25 macro categories, 77 sub categories and 630+ products
- **Analysis available:** by day part; meal occasions; full demographics; by channel/sub channel; delivered vs eat in/eat on the go; location consumed; regionality
- **Missions –** missions and need states (e.g., treat, healthy, something filling, quick)
- **Reporting** – 52 w/e, 12 w/e, year-on-year change. Data updated every 4 weeks. All data is accessed by an online reporting portal or via excel data tables

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Thank You!

Any Questions?
Talk to Tom on...

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Go to **twcgroup.net**

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