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

Latest data:

52 & 12 weeks ending 26 December 2022 (wave 109)

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Headline figures

52 & 12 weeks ending 26 December 2022 (wave 109)

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	Latest 52 weeks	52 weeks (year ago)	52 w/e YOY change	Latest 12 weeks	12 weeks (year ago)	12 w/e YOY change
Total out of home GB occasions	3.648bn	3.319bn	+10%	862mn	910mn	-5%
Total out of home GB Value	£21.548bn	£17.444bn	+24%	£4.983bn	£5.103bn	-2%

- Occasions growth has slowed and is now -5% on a 12w/e basis vs. 2021
- Inflation will be a significant contributor to 52 w/e value growth of +24%, however in the latest 12 w/e, value sales are in slight decline despite high inflation across the market.

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Total food-to-go occasions (Total GB)
12 w/e trend

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	Number of food-to-go occasions in the 12 weeks to…:
13 June 2022 (wave 102)	696 million
11 July 2022 (wave 103)	716 million
8 August 2022 (wave 104)	724 million
5 September 2022 (wave 105)	717 million
3 October 2022 (wave 106)	725 million
31 October 2022 (wave 107)	738 million
28 November 2022 (wave 108)	773 million
26 December 2022 (wave 109)	772 million

There has not been a material drop in the number of food-to-go occasions across the UK – in fact, they are flat vs. the previous 12 weeks. However, there has been a significant shift in where these occasions have taken place, with a big increase in retail outlets, at the expense of FTG outlets.

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Headline performance by sub-channel
Occasions

12 w/e 26 December 2022 (wave 109) vs. 12 w/e a year ago

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- **Total FTG & 'out of home'** — 862 mn occasions (-5% YonY)
  - **Total food to go** — -6%
    - Total supermarkets / multiples — +18%
    - Total convenience stores (excl mults) — -16%
    - Total discounters — +19%
    - Total sandwich shops & specialist FTG — -10%
    - Total coffee shops and cafes — -8%
    - Total fast food and takeaway — -17%
    - Other
      - Total high street — -59%
      - Total forecourts (excl mults) — +21%
      - Total transportation — -43%
      - Total workplace vending / mobile and street food — +9%
  - **Total eating out** — -6%
    - Total pubs — +3%
    - Total restaurants — -10%
    - Total hotels — -20%

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Summary – latest 12 w/e (26 December2022)

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- There were **862m out-of-home/FTG** occasions in the 12 weeks to 26 December: a decrease of -5% year-on-year.
- Value growth, which was previously outperforming occasions growth, fell to -2% over the same period.
- While the number of occasions has remained fairly static, sub-channel performance varies significantly. There has been a very sizeable increase in the % of occasions taking place in retail outlets (mainly supermarkets) – taking customers (and occasions) from traditional food-to-go outlets
- Whilst the mission ‘something inexpensive’ continues to be in strong growth, ‘something quick and easy to eat’ and interestingly ‘something sweet’ are seeing even stronger growth.
- Consumers are not willing to take risks in the current climate, with ‘something a bit different’ in strong decline.

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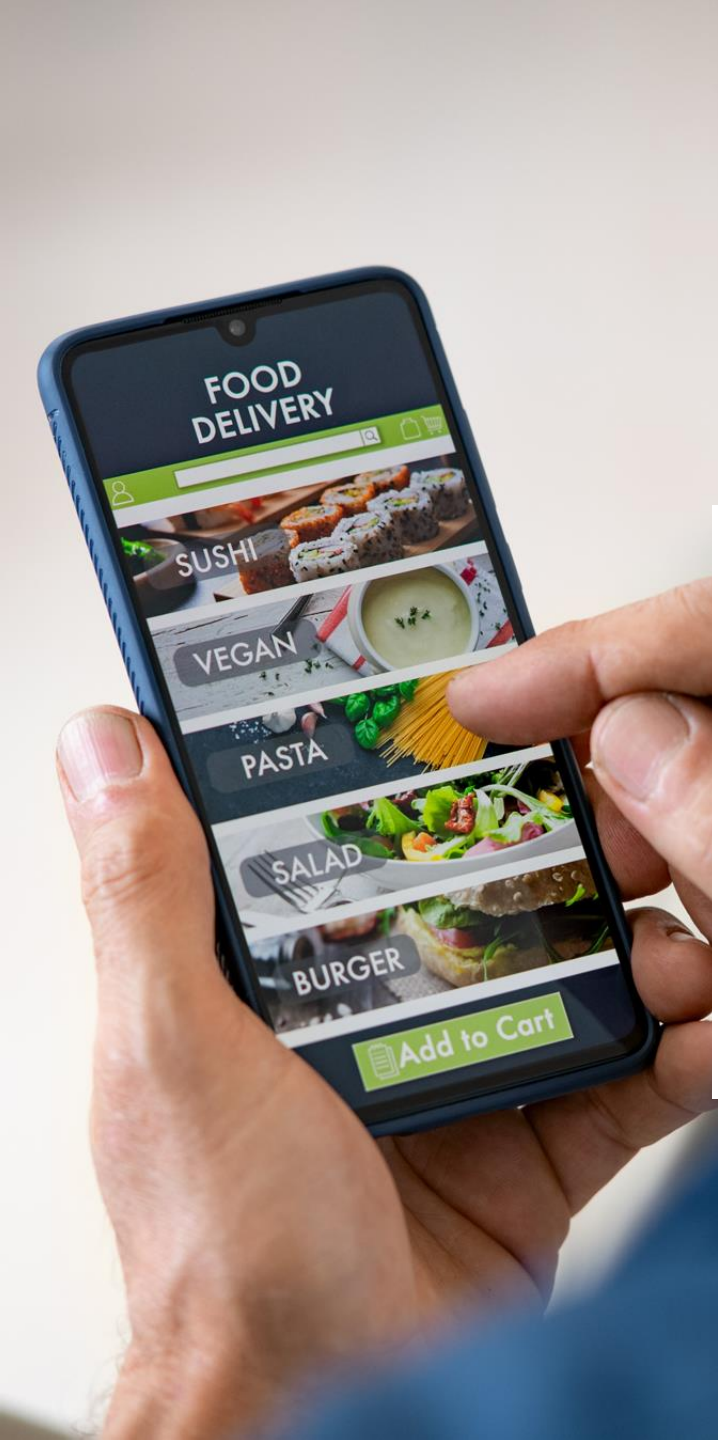

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Unlocking Opportunities in food-to-go

- 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!

Would you like to know more?
Would you like to see a demo of the reporting platform?

Talk to Tom on...

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or email **tom@twcgroup.net**
Go to **twcgroup.net**

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