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

Latest data:

52 & 12 weeks ending 23 January 2023 (wave 110)

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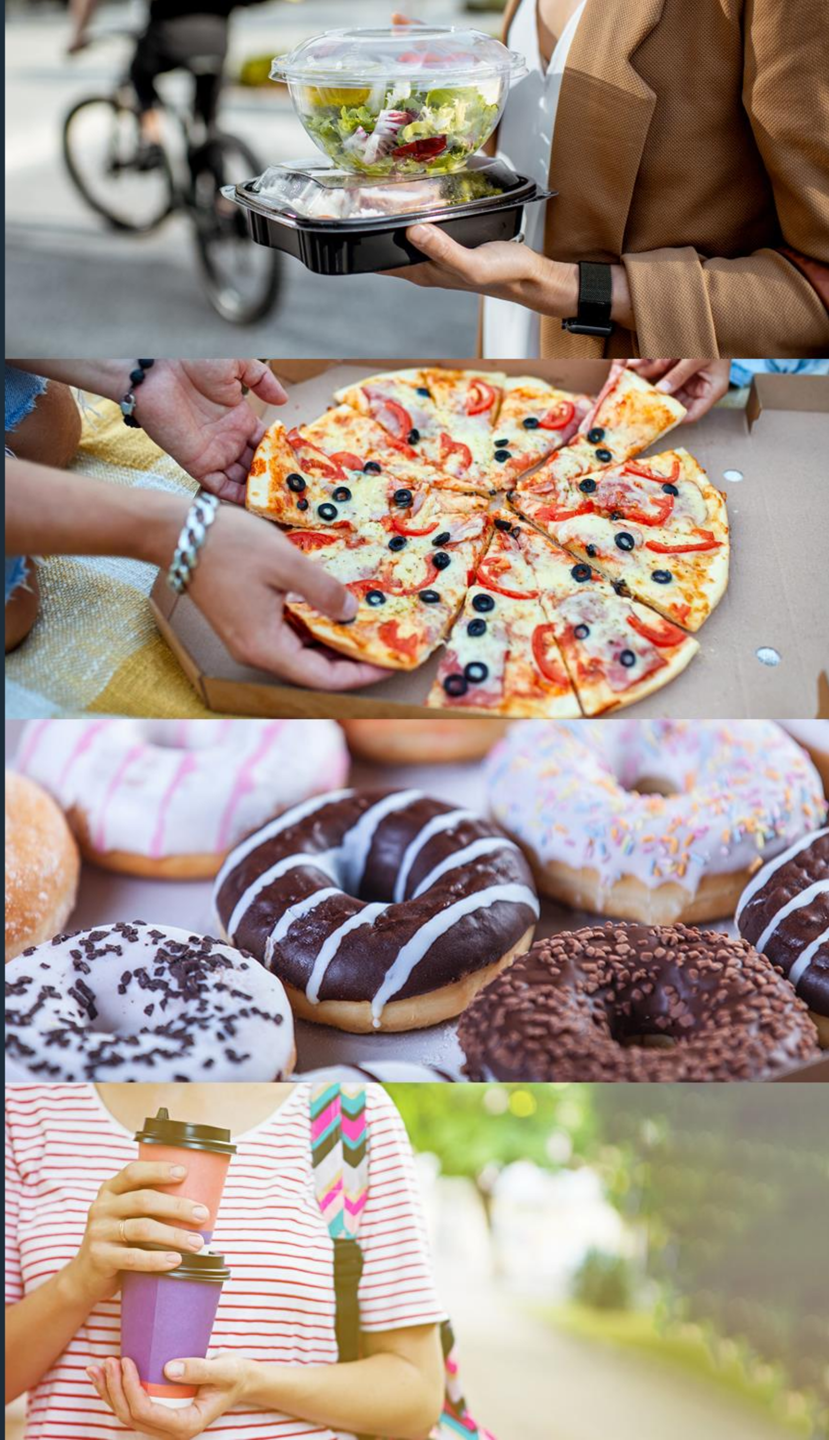

Headline figures

52 & 12 weeks ending 23 January 2023 (wave 110)

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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	3.605bn	3.430bn	+5%	818mn	930mn	-12%
Total out of home GB Value	£21.520bn	£18.192bn	+18%	£4.837bn	£5.097bn	-5%

- Occasions growth has slowed and is now -12% on a 12w/e basis vs. 2021
- Inflation will be a significant contributor to 52 w/e value growth of +18%, however in the latest 12 w/e, value sales are in 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…:
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
23 January 2023 (wave 110)	732 million

The number of food-to-go occasions continues to fall in the latest 12 weeks. Furthermore, we continue to a see a shift in where these occasions have taken place, with a supermarkets and discounters continuing to be the strongest growth outlets, at the expense of other outlets.

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Headline performance by sub-channel
Occasions

12 w/e 23 January 2023 (wave 110) vs. 12 w/e a year ago

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- **Total FTG & 'out of home'** — 818 mn occasions (-12% YonY)
  - **Total food to go** — -13%
    - Total supermarkets / multiples — +5%
    - Total convenience stores (excl mults) — -19%
    - Total discounters — +19%
    - Total sandwich shops & specialist FTG — -14%
    - Total coffee shops and cafes — -8%
    - Total fast food and takeaway — -23%
    - Other
      - Total high street — -64%
      - Total transportation — -62%
      - Total forecourts (excl mults) — -9%
      - Total workplace vending / mobile and street food — -13%
  - **Total eating out** — -10%
    - Total pubs — -9%
    - Total restaurants — -9%
    - Total hotels — -15%

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Summary – latest 12 w/e (23 January 2023)

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- There were **818m out-of-home/FTG** occasions in the 12 weeks to 23 January: a decrease of -12% year-on-year.
- Value growth continues to outperform occasions growth, but is also in negative territory on a 12 w/e basis at -5% year-on-year.
- Performance at a sub-channel level varies significantly. There has been a very sizeable increase in the % of occasions taking place in supermarkets & discounters – taking customers (and occasions) from traditional food-to-go outlets, as well as from the high street, independent cstores and forecourts.
- Whilst the mission ‘something inexpensive’ continues to grow year-on-year, ‘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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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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Go to **twcgroup.net**

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