Mealtrak

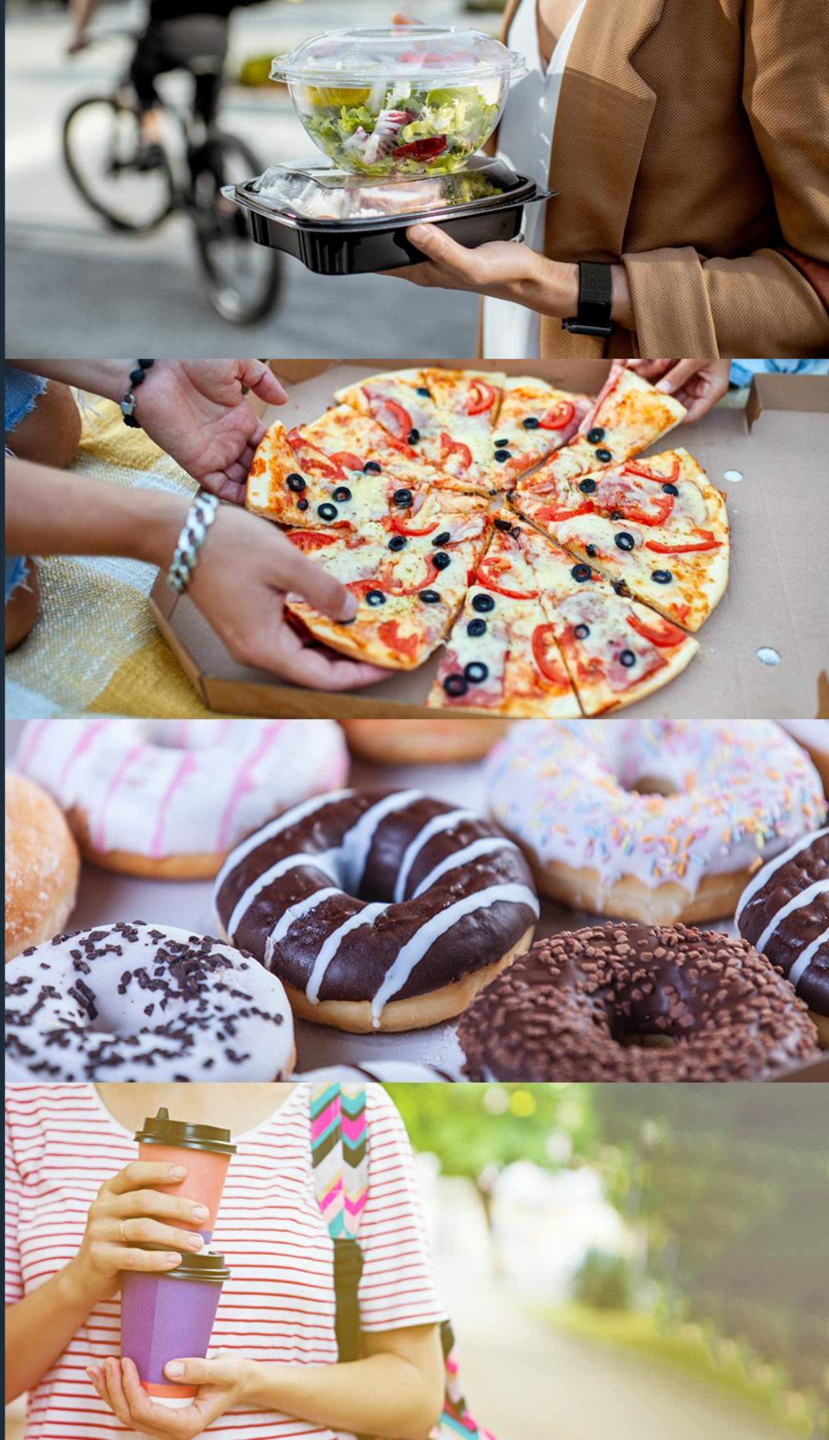
Consumer food-to-go & foodservice purchasing and consumption behaviour

Latest data:

52 & 12 weeks ending 20 February 2023 (wave 111)

twc | Harnessing data
Empowering wholesale foodservice & convenience

mealtrak



Headline figures

52 & 12 weeks ending 20 February 2023 (wave 111)

	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	3.599bn	3.521bn	+2%	814mn	874mn	-7%
Total out of home GB Value	£21.631bn	£18.945bn	+14%	£4.991bn	£4.897bn	+2%

Total food-to-go occasions (Total GB)

12 w/e trend

twc
Harnessing data
Empowering wholesale foodservice & convenience

	Number of food-to-go occasions in the 12 weeks to…:
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
20 February 2023 (wave 111)	724 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, especially the multiples and discounters.

mealtrak

Headline performance by sub-channel Occasions

12 w/e 20 February 2023 (wave 111) vs. 12 w/e a year ago

twc
Harnessing data
Empowering wholesale foodservice & convenience

- **Total FTG & 'out of home'** — 814 mn occasions (-7% YonY)
  - **Total food to go** — -7%
    - Total supermarkets / multiples — +5%
    - Total convenience stores (excl mults) — -11%
    - Total discounters — +28%
    - Total sandwich shops & specialist FTG — -11%
    - Total coffee shops and cafes — +3%
    - Total fast food and takeaway — -16%
    - Other
      - Total high street — -46%
      - Total forecourts (excl mults) — -22%
      - Total transportation — -54%
      - Total workplace vending / mobile and street food — -9%
  - **Total eating out** — -8%
    - Total pubs — -6%
    - Total restaurants — -8%
    - Total hotels — -19%

mealtrak

Summary – latest 12 w/e (20 February 2023)

Harnessing data
Empowering wholesale foodservice & convenience

- There were 814m out-of-home/food-to-go occasions in the 12 weeks to 20 February: a decrease of -7% year-on-year.
- Value growth continues to outperform occasions growth: it was +2% over the same period.
- There continues to be a marked divide in the performance of different sub-channels, with the strongest performance from the multiples and the discounters. Coffee shops are also in modest growth this period (+3%). All other sub-channels are in decline.
- Practicality continues to win - 'something quick and easy to eat' remains the top growth mission this period, followed by 'something inexpensive'. Meanwhile, treats and 'something I was really craving' are in decline.
- Consumers are not willing to take risks in the current climate, with the mission 'something a bit different' in strong decline.

twc
Harnessing data
Empowering wholesale
foodservice & convenience

Unlocking Opportunities in food-to-go

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

mealtrak

Introducing MealTrak

twc
Harnessing data
Empowering wholesale foodservice & convenience

- 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

mealtrak

Thank You!

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

Talk to Tom on...

01908 101 389
or email tom@twcgroup.net
Go to twcgroup.net

twc
Harnessing data
Empowering wholesale foodservice & convenience