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

Latest data:

52 & 12 weeks ending 20 March 2023 (wave 112)

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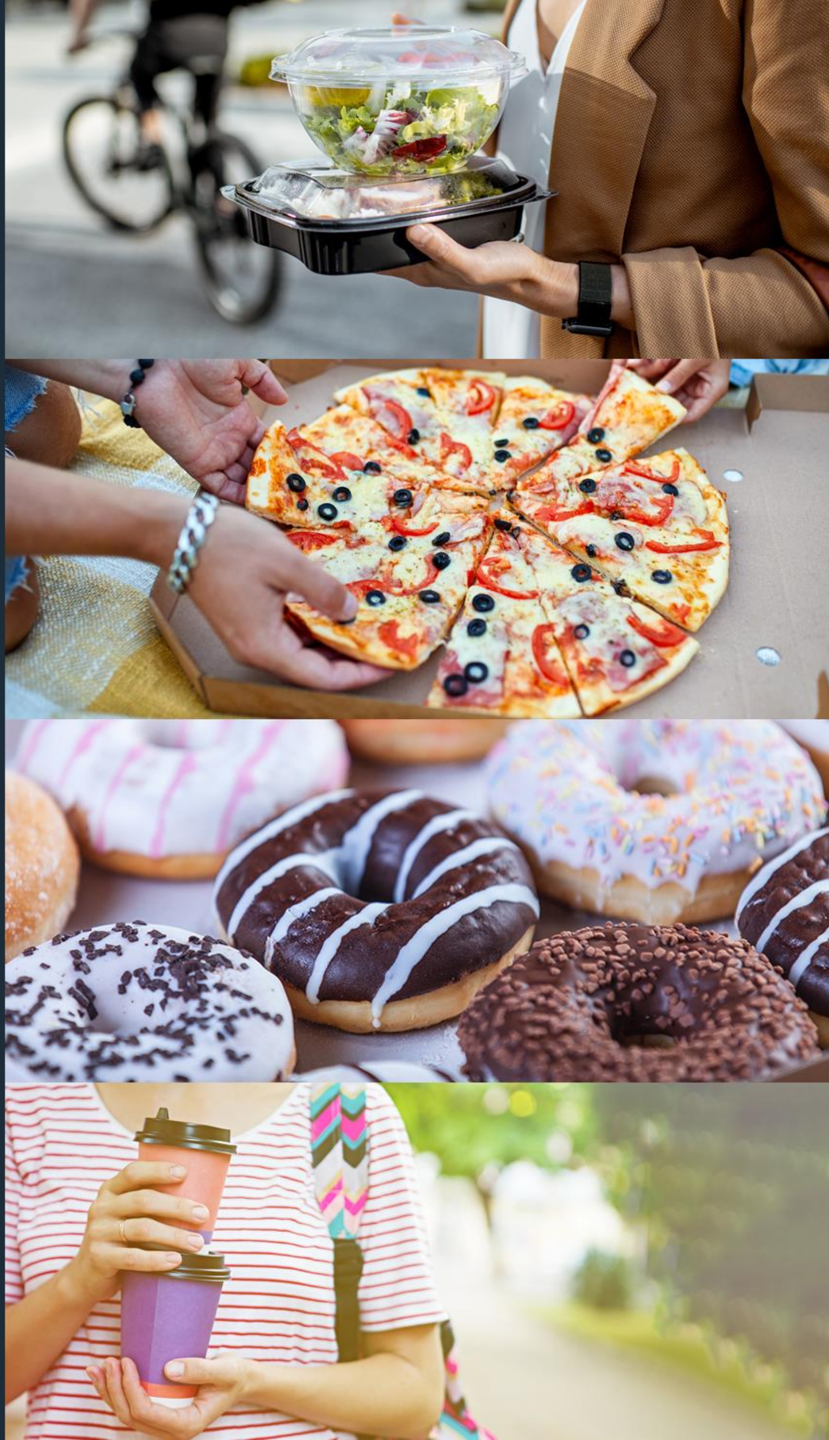

Headline figures

52 & 12 weeks ending 20 March 2023 (wave 112)

	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	3.559bn	3.604bn	-1%	807mn	896mn	-10%
Total out of home GB Value	£21.530bn	£19.900bn	+8%	£5.081bn	£5.099bn	+0%

Total food-to-go occasions (Total GB)

12 w/e trend

	Number of food-to-go occasions in the 12 weeks to…:
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)	723 million
20 March 2023 (wave 112)	711 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 an increase in retail outlets, at the expense of FTG outlets.

Headline performance by sub-channel Occasions

12 w/e 20 March 2023 (wave 112) vs. 12 w/e a year ago

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- **Total FTG & ’out of home’** – 807 mn occasions (-10% YonY)
  - **Total food to go** – -11%
    - Total supermarkets / multiples – +3%
    - Total convenience stores (excl mults) – -2%
    - Total discounters – +23%
    - Total sandwich shops & specialist FTG – -24%
    - Total coffee shops and cafes – -13%
    - Total fast food and takeaway – -12%
    - Other
      - Total high street – -17%
      - Total transportation – -40%
      - Total forecourts (excl mults) – -43%
      - Total workplace vending / mobile and street food – -13%
  - **Total eating out** – -2%
    - Total pubs – +2%
    - Total restaurants – -6%
    - Total hotels – -2%

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

- There were 807m out-of-home/FTG occasions in the 12 weeks to 20 March: a decrease of -10% year-on-year.
- Value growth continues to outperform occasions growth: it was flat (+0%) over the same period.
- Sub-channel performance varies significantly, with discounters and the multiples showing the strongest growth, whilst sandwich shops, coffee shops, fast food/takeaway, high street, transportation and workplace are all in decline. Eating out currently outperforms food-to-go.
- After months of strong growth, the mission ‘something inexpensive’ has gone into negative territory (-3%) in the latest 12 weeks. The strongest performing mission is ‘something quick and easy to eat’.
- Consumers are not willing to take risks in the current climate, with ‘something a bit different’ in very strong decline, whilst ‘regular favourite’ is in growth.

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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

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**
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