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

Latest data:

52 & 12 weeks ending 17 April 2023 (wave 113)

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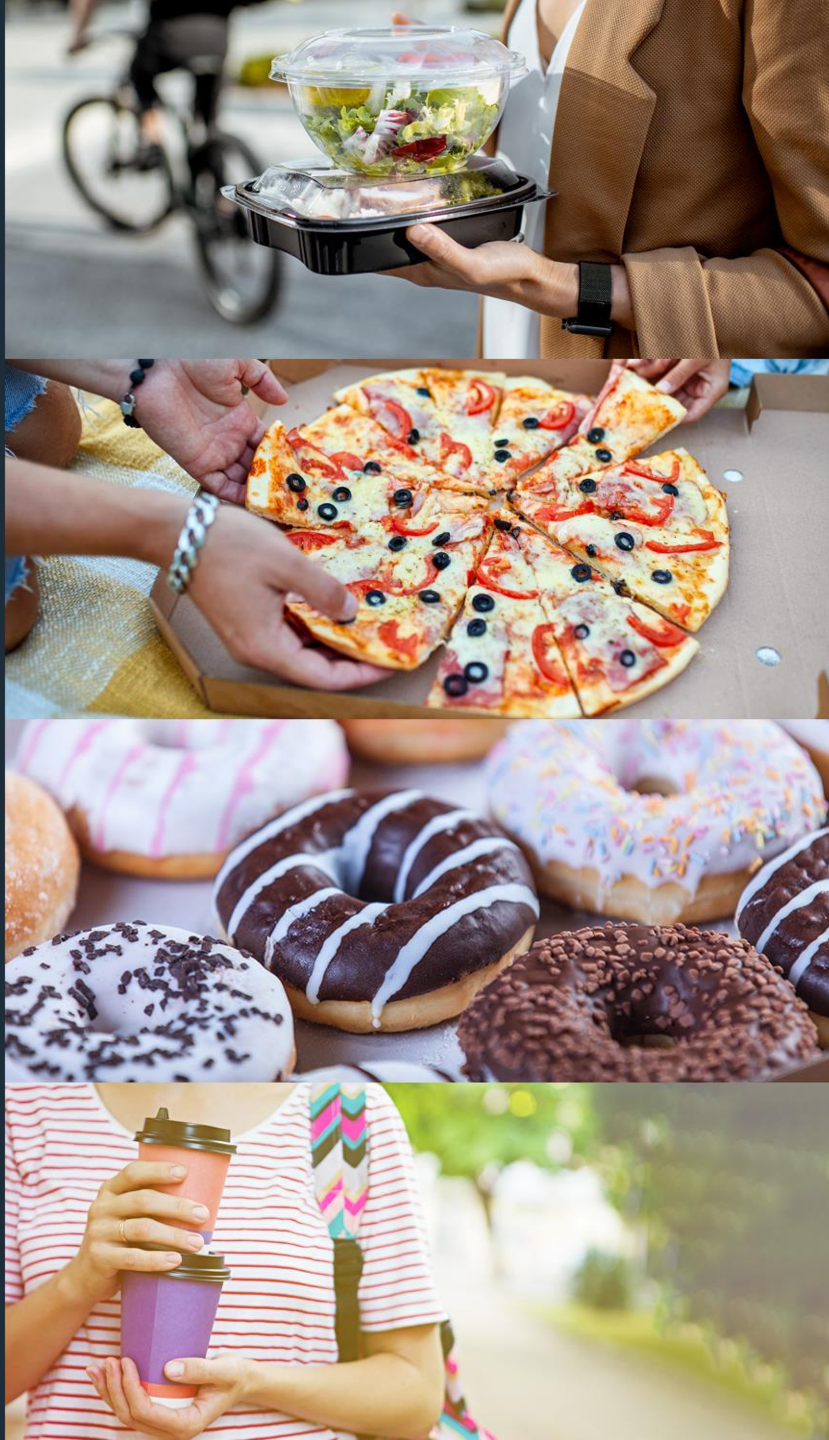

Headline figures

52 & 12 weeks ending 17 April 2023 (wave 113)

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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	3.592bn	3.619bn	-1%	845mn	858mn	-1%
Total out of home GB Value	£21.755bn	£20.231bn	+8%	£5.248bn	£5.013bn	+5%

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Total food-to-go occasions (Total GB)

12 w/e trend

	Number of food-to-go occasions in the 12 weeks to…:
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
17 April 2023 (wave 113)	747 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.

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Headline performance by sub-channel
Occasions

12 w/e 17 April 2023 (wave 113) vs. 12 w/e a year ago

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Total FTG & 'out of home'
845 mn occasions (-1% YonY)

- **Total food to go** -2%
  - Total supermarkets / multiples +9%
  - Total convenience stores (excl mults) +1%
  - Total discounters +25%
  - Total sandwich shops & specialist FTG -14%
  - Total coffee shops and cafes -10%
  - Total fast food and takeaway 0%
  - Other
    - Total high street -10%
    - Total transportation -17%
    - Total forecourts (excl mults) -22%
    - Total workplace vending / mobile and street food +4%
- **Total eating out** +3%
  - Total pubs +17%
  - Total restaurants -7%
  - Total hotels -6%

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Summary – latest 12 w/e (17 April 2023)

- There were 845m out-of-home/FTG occasions in the 12 weeks to 17 April 2023, a modest decrease of -1% year-on-year.
- Value growth continues to outperform occasions growth: it increased +5% over the same period.
- Sub-channel performance varies significantly, with discounters and the multiples continuing their outperformance of the market; whilst sandwich shops, coffee shops, high street, transportation and forecourts are all in decline in the latest 12 weeks. ‘Eating out’ is outperforming ‘food-to-go’.
- ‘Something quick and easy’ and ‘regular favourite’ are the winning missions in the latest 12 weeks, suggesting consumers want ease and are not wanting to take risks (‘something different’ remains in strong decline)
- ‘Something inexpensive’ remains in modest year-on-year growth but is not driving the market to the extent it was a few months ago.

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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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