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The Out of Home Environment in Scotland (2019)

Provided by KANTAR.
Commissioned by Food Standards Scotland

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26th March 2020

Agenda

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Eating Out of Home – Global context

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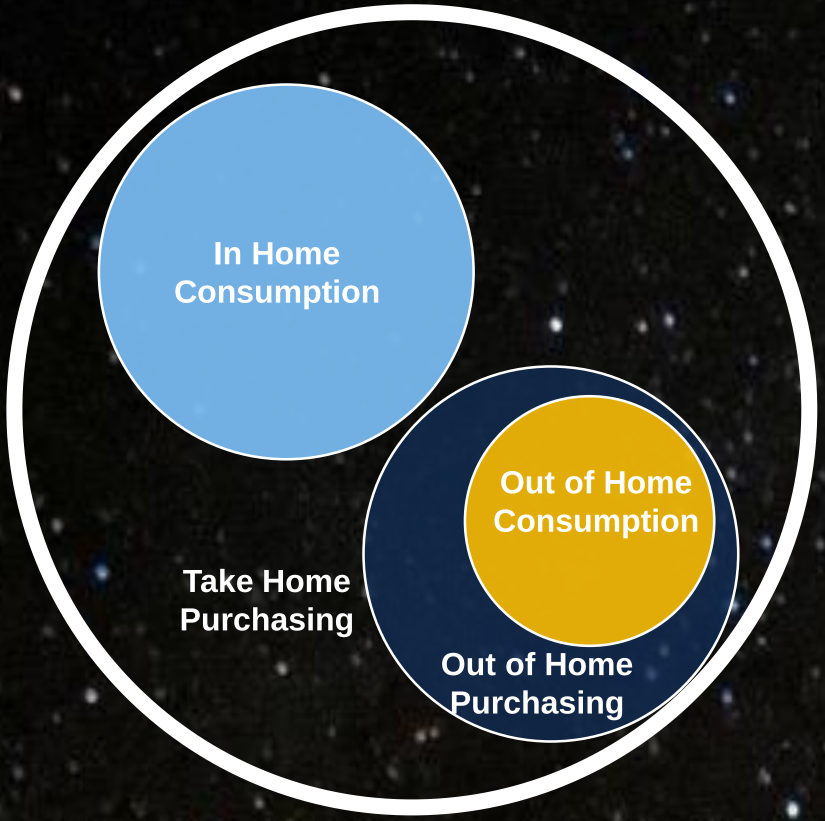
Methodology & Definitions



panellist universe, not market universe

We collect data on

650,000+
raw trip records
44k in Scotland

1.3 million
raw purchase records
98k in Scotland

Out of Home Universe
All food and non-alcoholic drinks, across all channels

7,500 individuals (subset of the take home purchase), recording every purchase they make, continuously over time

3,000 individuals (subset of out of home purchase), recording how they consume, continuously over time

We collect data on anywhere you can buy food and non alcoholic drinks

Market	Channel	Consumption
Non-alcoholic cold drinks (including iced coffee)	Quick service restaurants (fast food outlets and takeaways)	Meal occasions
Non-alcoholic hot drinks	Full service restaurants, pubs & bars	Reasons for consumption
Savoury snacks, including crisps, nuts, savoury snacks & popcorn	Coffee shops and cafes	Who was present
Sweet snacks, including sweet biscuits	Supermarkets main store & cafes	Where eaten
Quick meals i.e. sandwiches & salads	Convenience outlets (symbols & independents, high street & supermarket convenience stores)	Occasion descriptors
Main meals	Leisure & hotels	Purchase v. consumption occasion
	Workplace & Education	
	Travel & vending (supermarket forecourts, forecourts & travel, vending)	

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Please find further detail on category and channel definitions in appendix

We can get information about each consumption occasion

Needs	Main meal descriptor	Number of people present
Enjoy the taste Asked for my partner/children Low in fat/salt/sugar Quick Can eat on the move Easy to come by Etc.	Treat Celebratory Quick bite Social On the go Relaxing Together time Etc	1-7 person occasions

Meal occasions	Where consumed?	Bought for…
Breakfast Morning snack Lunch Afternoon snack Evening meal Evening snack	On premise School/workplace Travel Outside Leisure outlet etc	Myself Another adult (Adult 16+) Child (0-15 years)

Please find further detail on usage questions in appendix

Throughout the presentation there is a view on demographics, broken down by:

Age of buyer:

Under 25 years old

25 – 34 years old

35 – 54 years old

55 years and over

Social class of buyer:

Social Class AB
Professional senior managers in business, middle-management, business owners

Social Class C1
Junior management and other non-manual workers

Social Class C2
Skilled manual workers

Social Class D
Semi-skilled and unskilled manual workers, apprentices and trainee of skilled workers

Social Class E
Unemployed, off sick, casual workers without regular income

Please find further detail on demographics in appendix

Quick View Glossary of Measures Used in Report

YA	Year ago, usually in the context of growth
YoY	Year on year, usually in the context of growth
Trips, Trips %	Trips for Out of Home food and non alcoholic drink by all individuals
Trips per Customer	Average number of visits per customer in the given time period
Penetration %	The % of the population buying the specified line in the given time period and region
Average Spend per Customer	The total spend per customer in the given time period
Average Price per Item	The average price paid per item, £
Average Spend per Visit	The average spend per visit, £
Index (IX.)	Related to the total universe of category and whether it is more or less important

Quick View Glossary of Terms Used in Report

OOH	Out of Home
FOTG/OTG	Food on the go/On the go
QSR/QS	Quick Service Restaurant/Quick Service
FSR/FS	Full Service Restaurant/Full Service
Discretionary foods	These foods are typically high in fat, sugar or salt, and provide little or no nutritional benefit necessary for a healthy diet
Aggregator	A third party that facilitates the order of food from a restaurant to a consumer, e.g. Just Eat, Deliveroo

This deck looks at the GB Out of Home market, focusing on Scotland

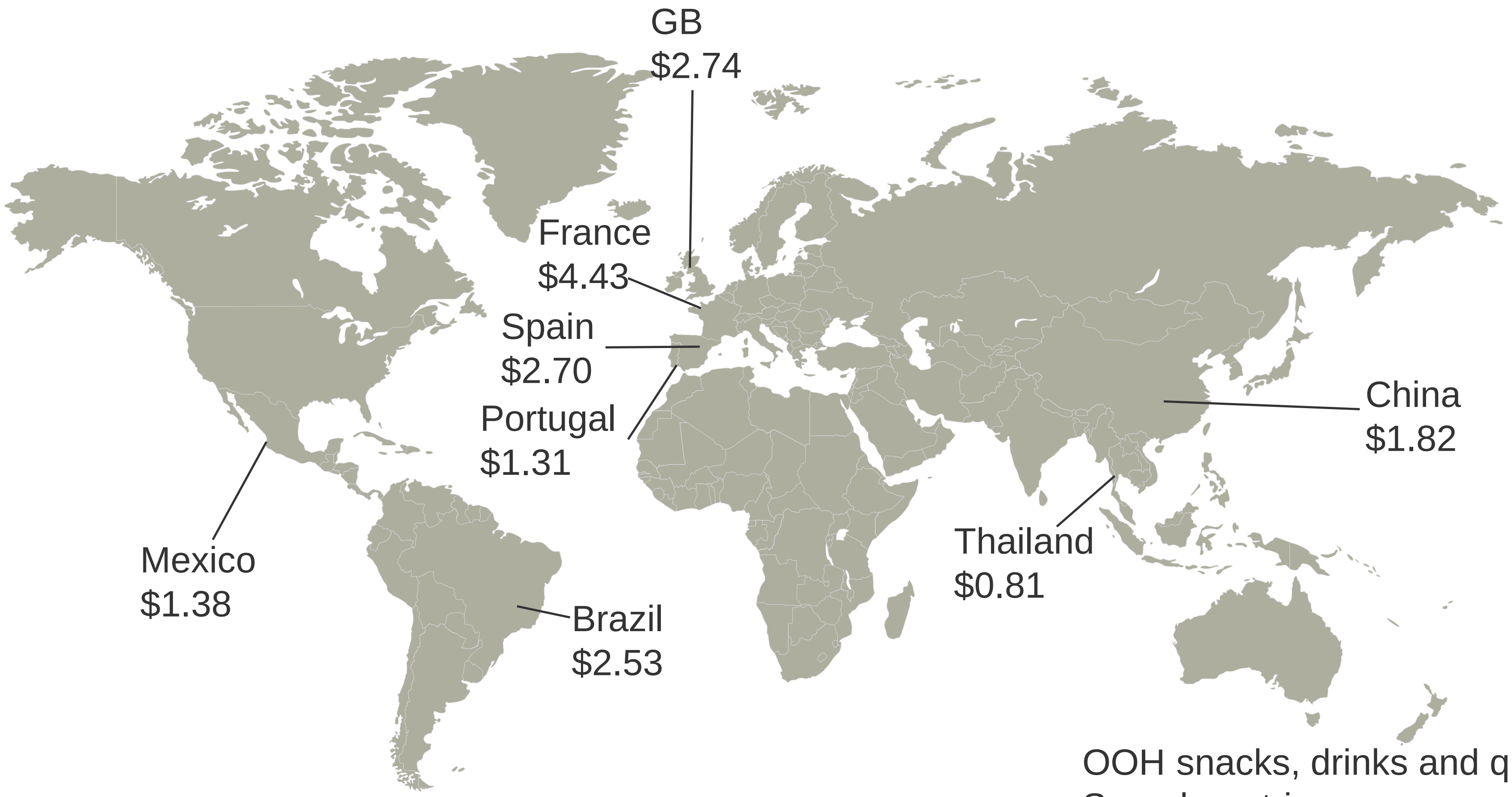
This deck is an overview of the OOH market, focusing on 3 key areas of interest: takeaway and delivery, food on the go and children's OOH consumption.

Throughout the deck there are comparisons of Scotland to the total GB market. However, for certain emerging markets we have kept the analysis at total GB level, to ensure robustness.

The data covers a period of time directly before the COVID-19 pandemic, and therefore provides a baseline for further investigation regarding the impact of COVID-19 on the OOH food and drink environment.

Eating Out of Home – Global Trends

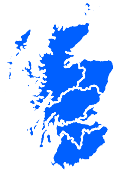
In a global context, GB has one of the more expensive OOH markets with only France having a higher spend per trip



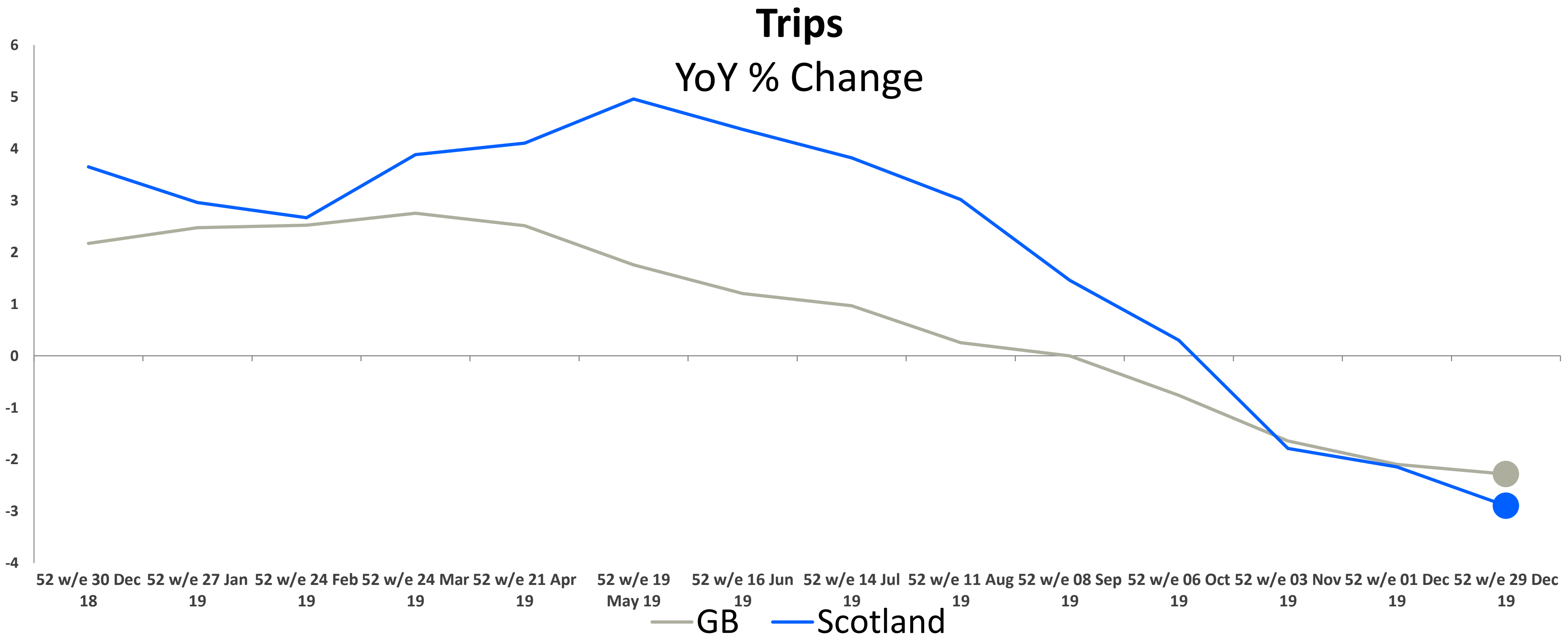
OOH snacks, drinks and quick meals only
Spend per trip per consumer

GB and Scotland – Out of Home Market

The OOH market in GB grows through increased prices while Scotland's market declines as consumers are making fewer trips

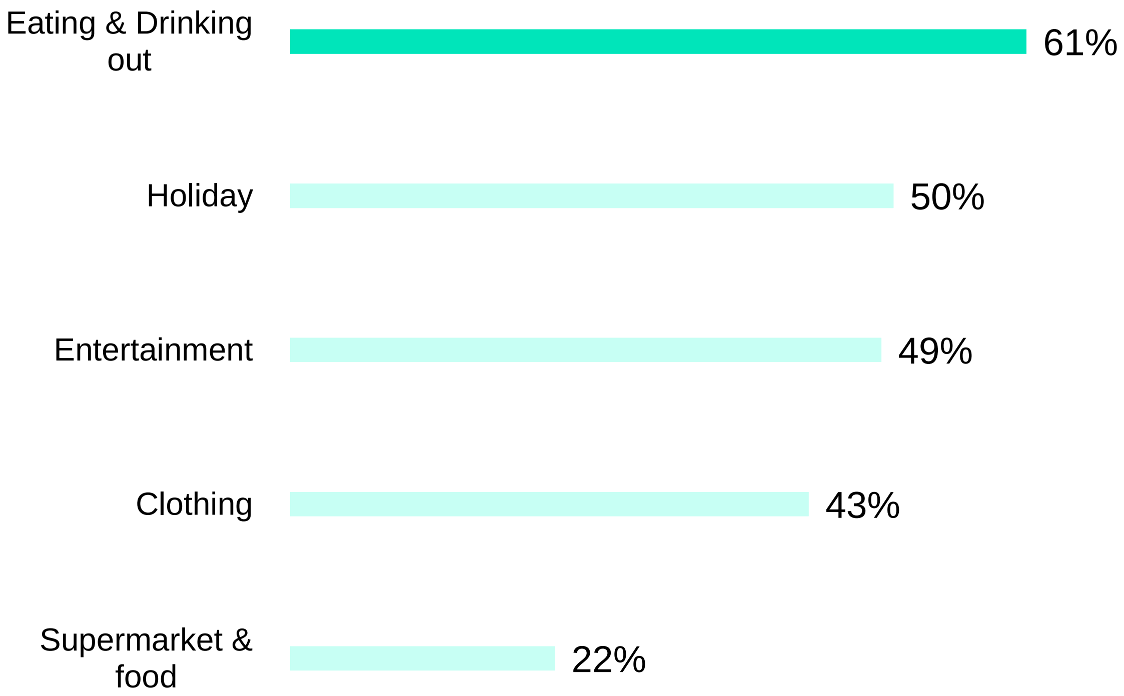
	Spend	Trips per Person	Items per Trip	Spend per Item
Total GB 	**£52.9bn** (+1.8% YoY)	**4.6 per week** (-2.9% YoY)	**2** (+5.6% YoY)	**£2.25** (+3.2% YoY)
Scotland 	**£4.6bn** (-0.9% YoY)	**4.2 per week** (-3.6% YoY)	**2.1** (Flat)	**£2.34** (+4% YoY)

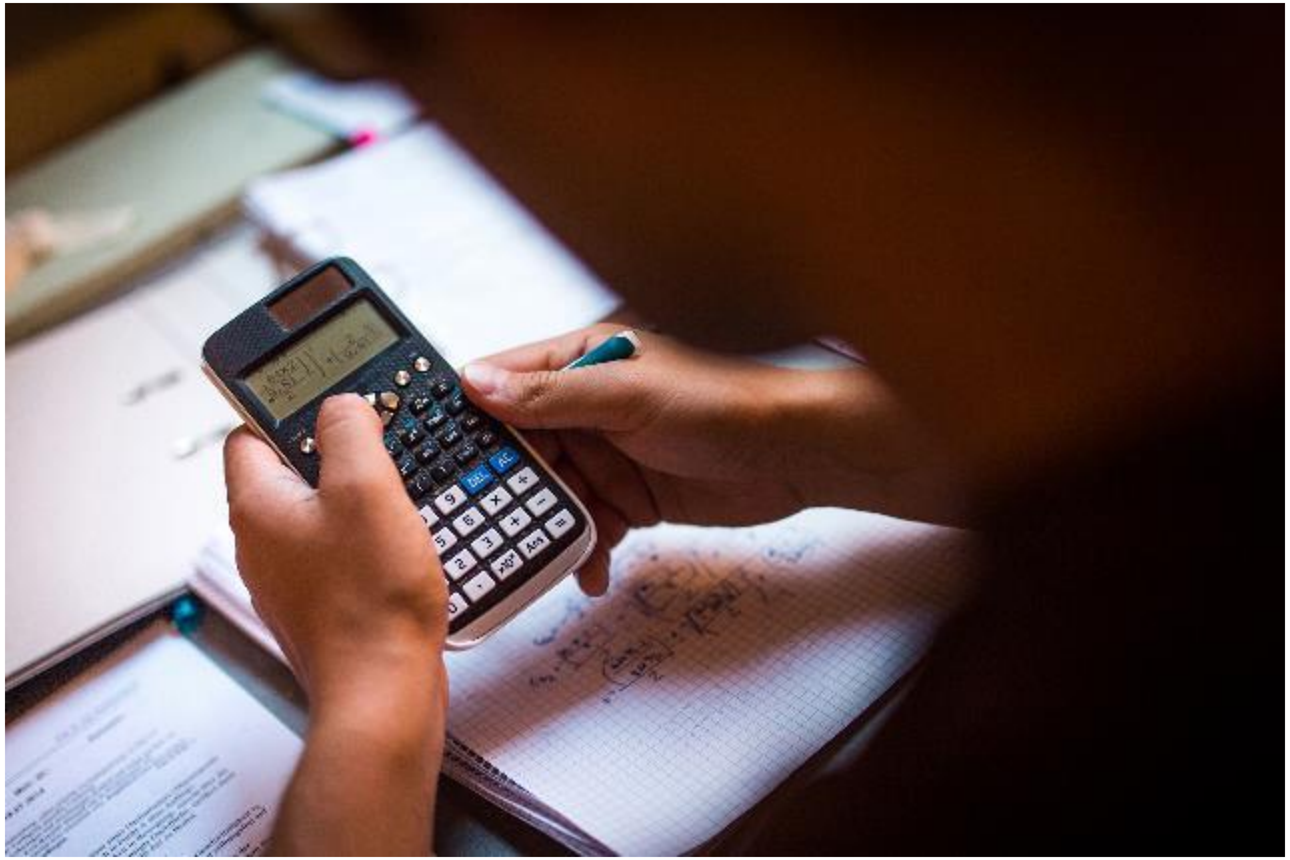
Scotland's OOH market dips into decline as consumers are making fewer trips after strong growth last year



When consumers are trying to spend less in GB, eating and drinking out is where most will cut back

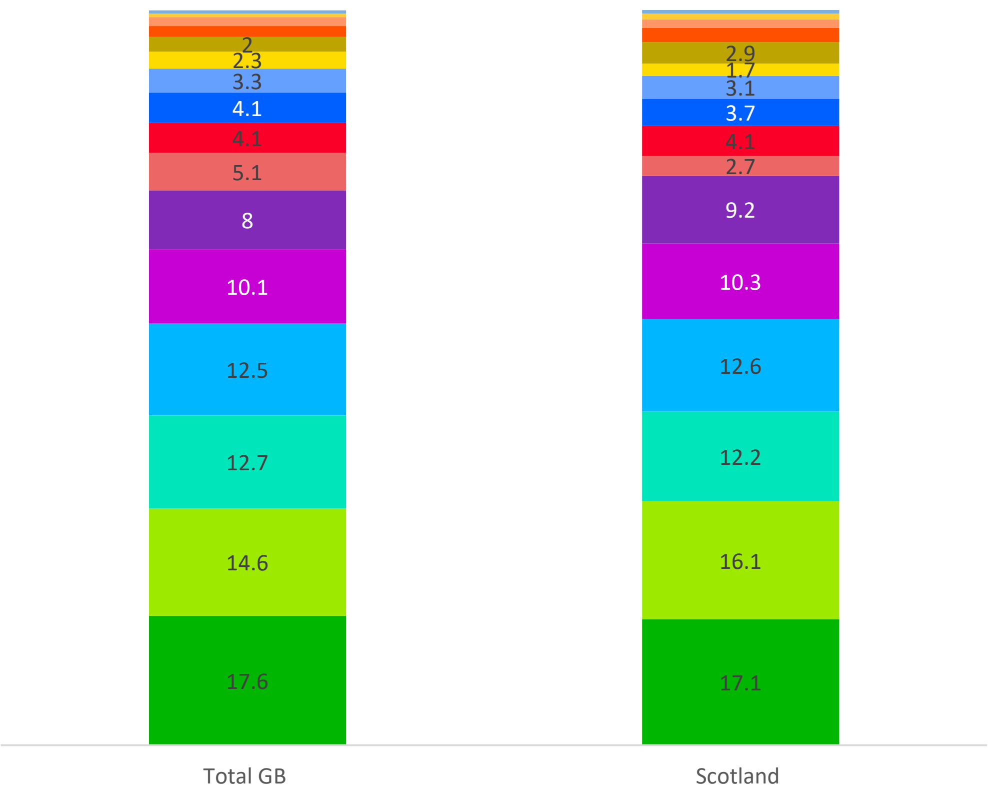
“If you have to reduce your spending, where will you do so?”

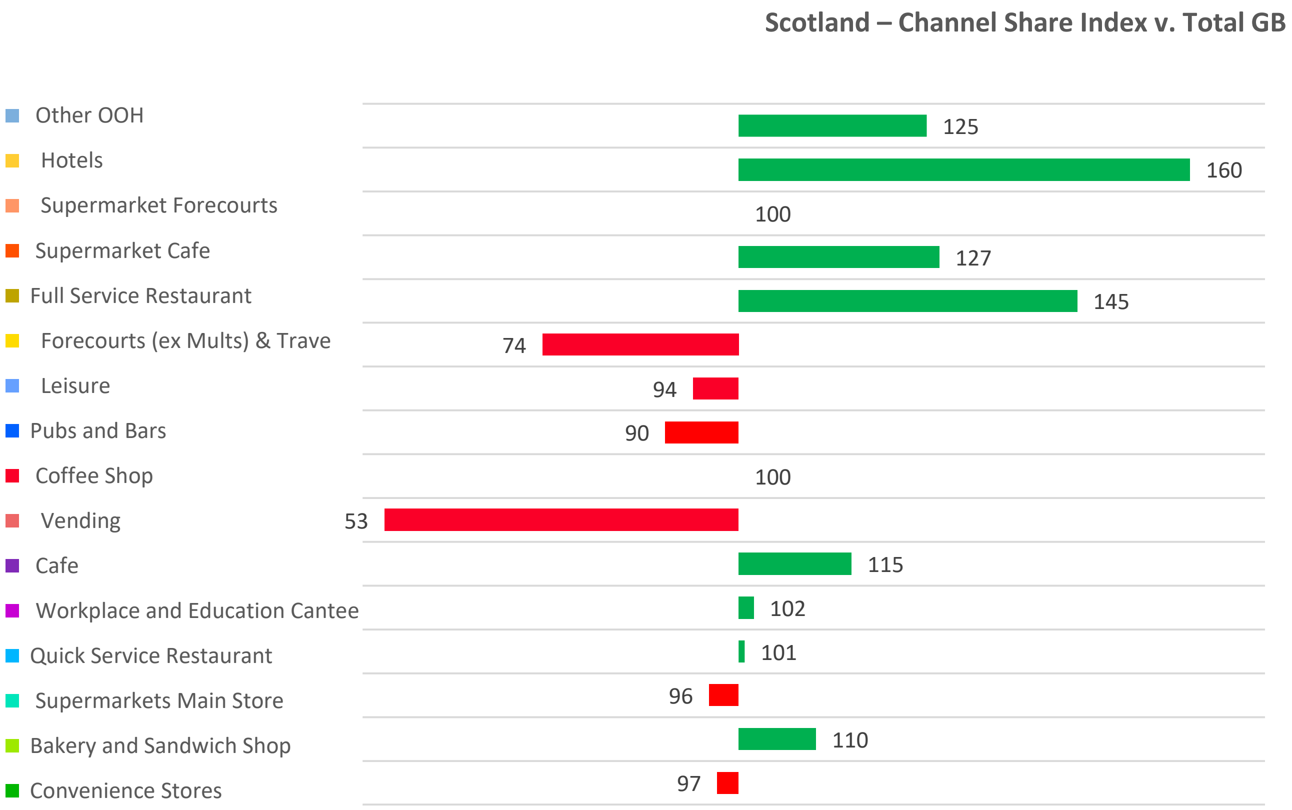




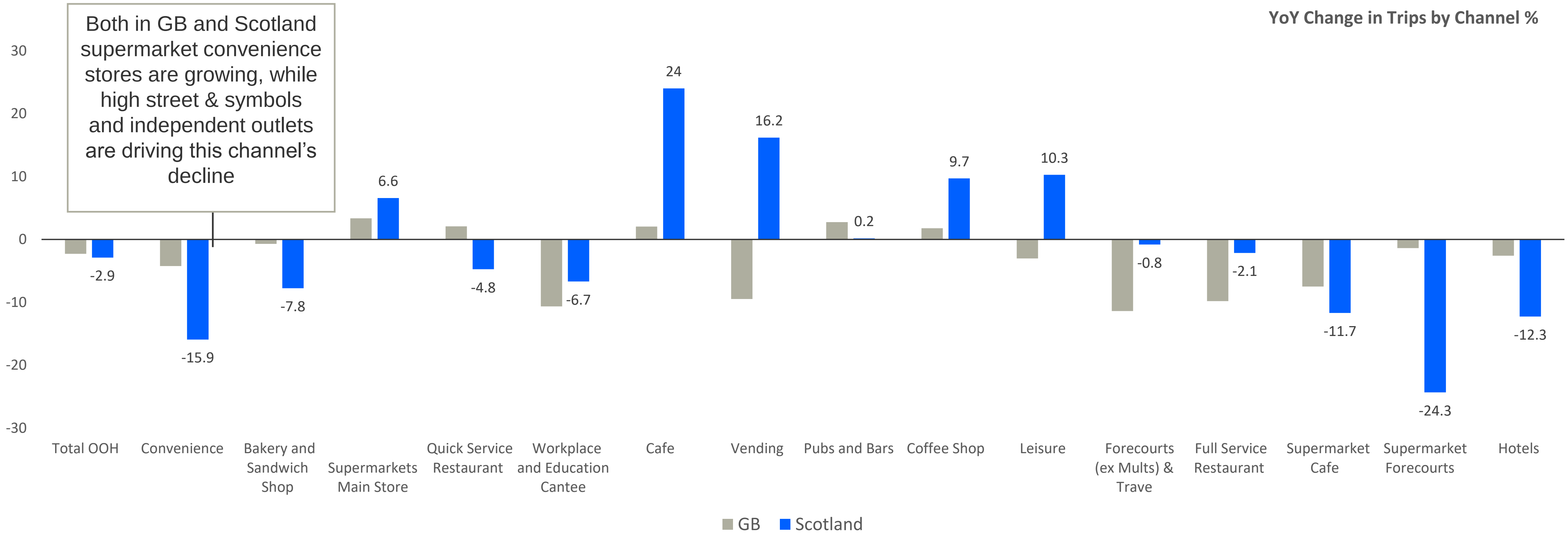
Source: Worldpanel Plus, 8,000 people surveyed in February 2019

Around 75% of visits in Scotland are made to convenience stores, bakery and sandwich shops, supermarkets, quick service restaurants, workplace and education canteens, coffee shops and cafes

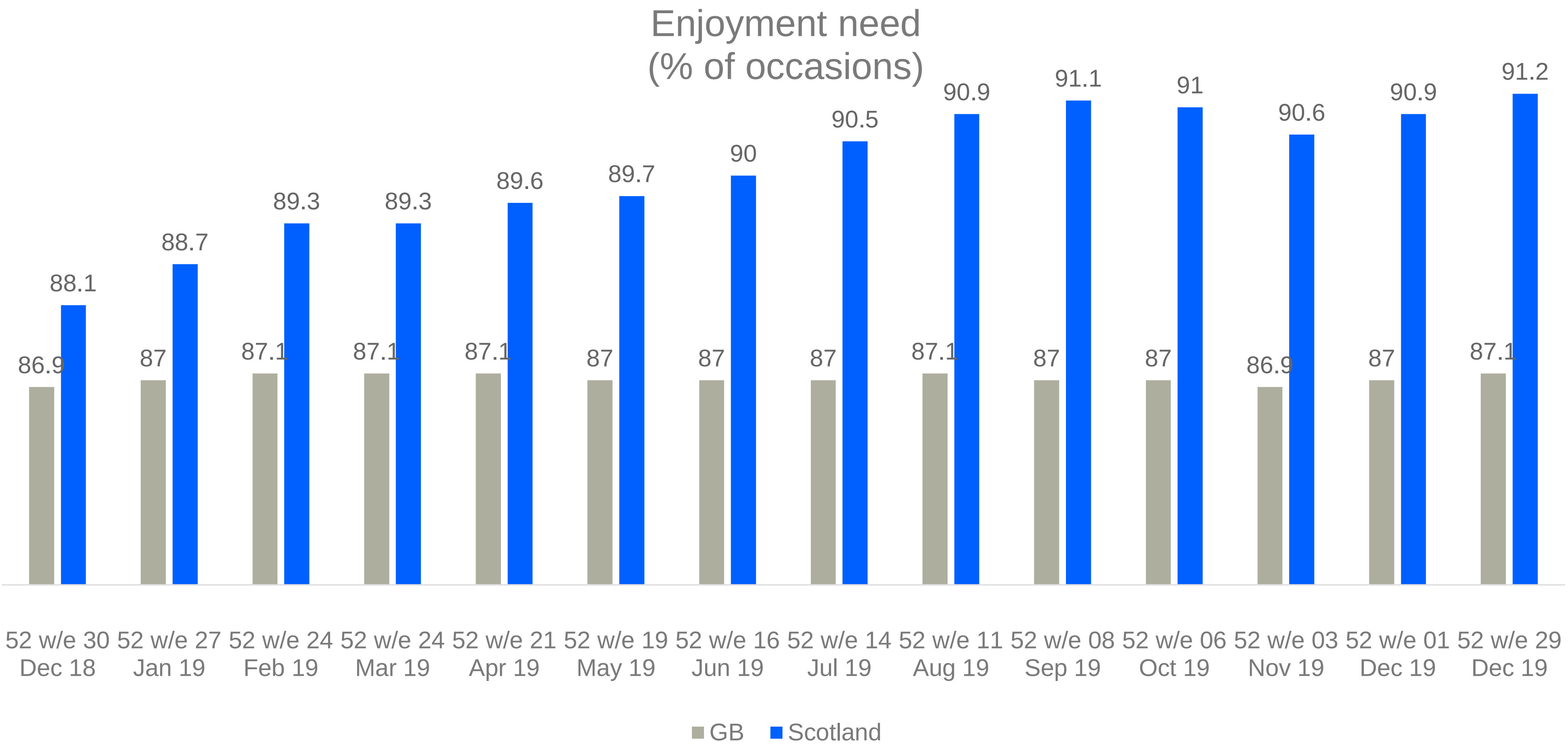




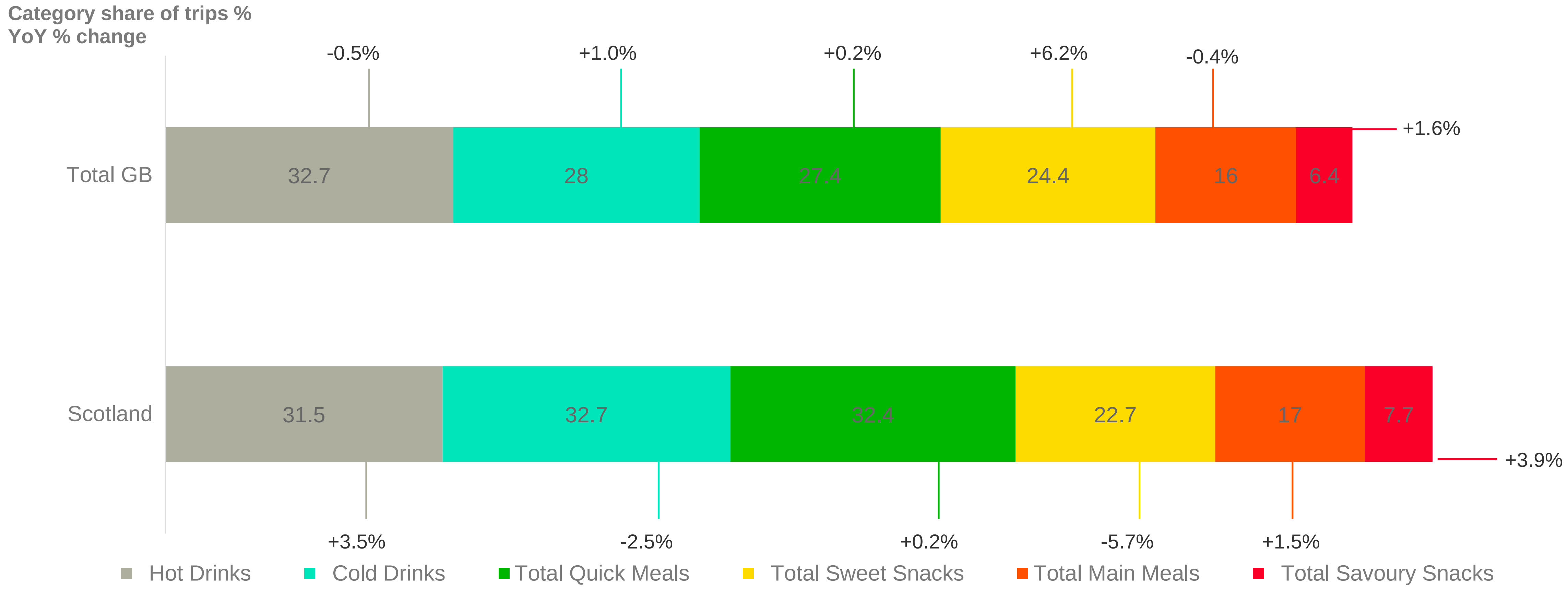
In Scotland, OOH trips to cafes, vending, coffee shops and leisure outlets are increasing, while trips to convenience outlets are declining



In Scotland consumers are increasingly looking for OOH to fulfil enjoyment occasions, while this remains stable for total GB



In Scotland consumers are making fewer trips to buy sweet snacks and cold drinks, potentially linked to the decline in convenience outlet visits



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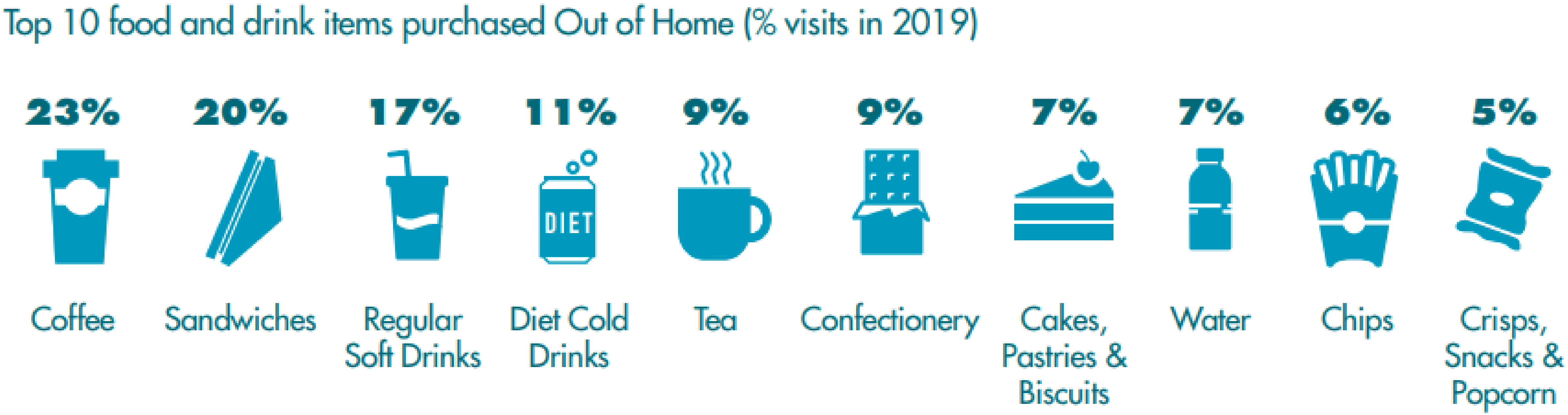
Kantar Worldpanel Out of Home Purchase | Total Market v. Scotland | Trips % | 52 w/e 29th December 2019 v. YA
Note: there can be more than one item per trip, on average, Scotland 2.1 item per trips, compared to GB

In Scotland the most popular food and drink purchased out of home are coffee, sandwiches and regular soft drinks



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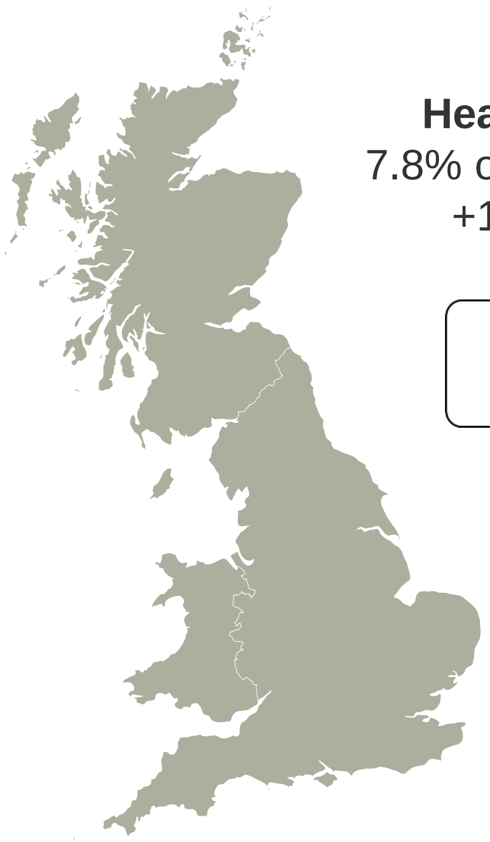
Note that fruit makes up only a small proportion of the visits for total OOH %

Both in GB and Scotland, the discretionary categories market is declining faster than the total market

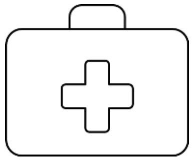
% of OOH trips
YoY % change

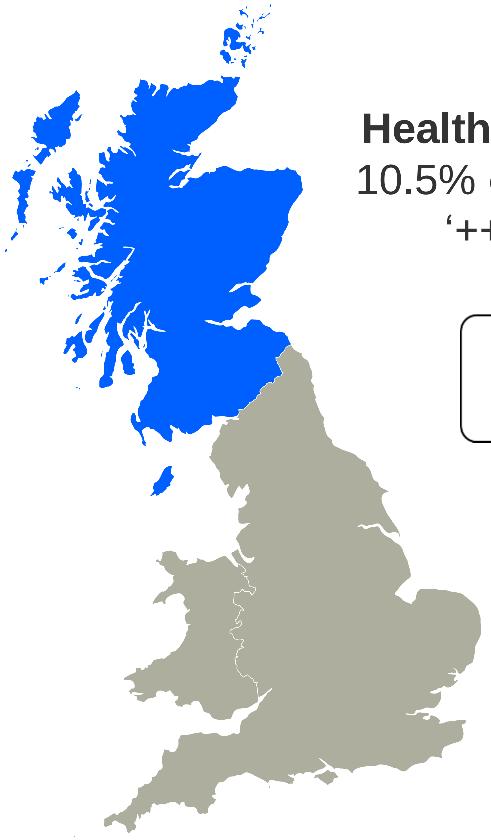
	Total discretionary	Regular soft drinks	Confectionery	Cakes, Pastries & Biscuits	Crisps, Snacks & Popcorn	Ice cream
GB	37% -3.1% YoY	16% -0.7% YoY	10% -5.2% YoY	8% -2.8% YoY	5% +0.6% YoY	1.4% -3.4% YoY
Scotland	37% -3.6% YoY	17% +2% YoY	9% -11.6% YoY	7% -2.6% YoY	5% +5% YoY	1% +7.4% YoY

Health is becoming increasingly important to consumers OOH, especially in Scotland

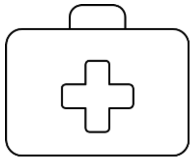


Health - GB
7.8% of occasions
+1% YoY



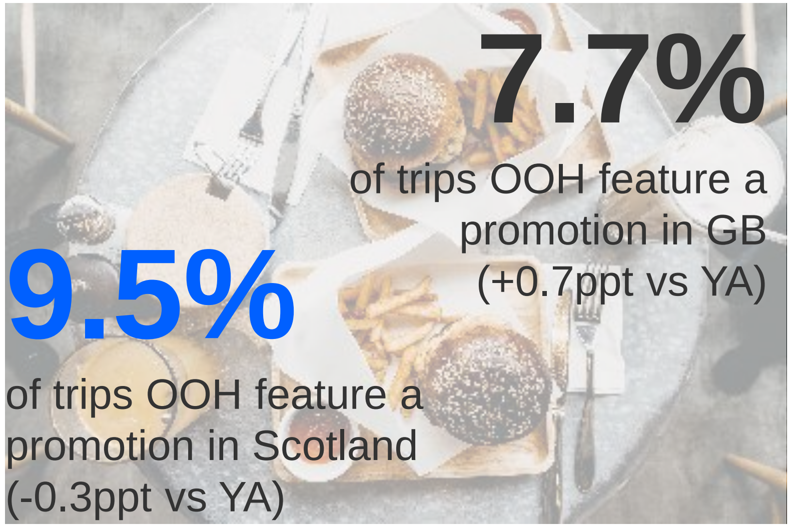


Health – Scotland
10.5% of occasions
‘++%’ YoY

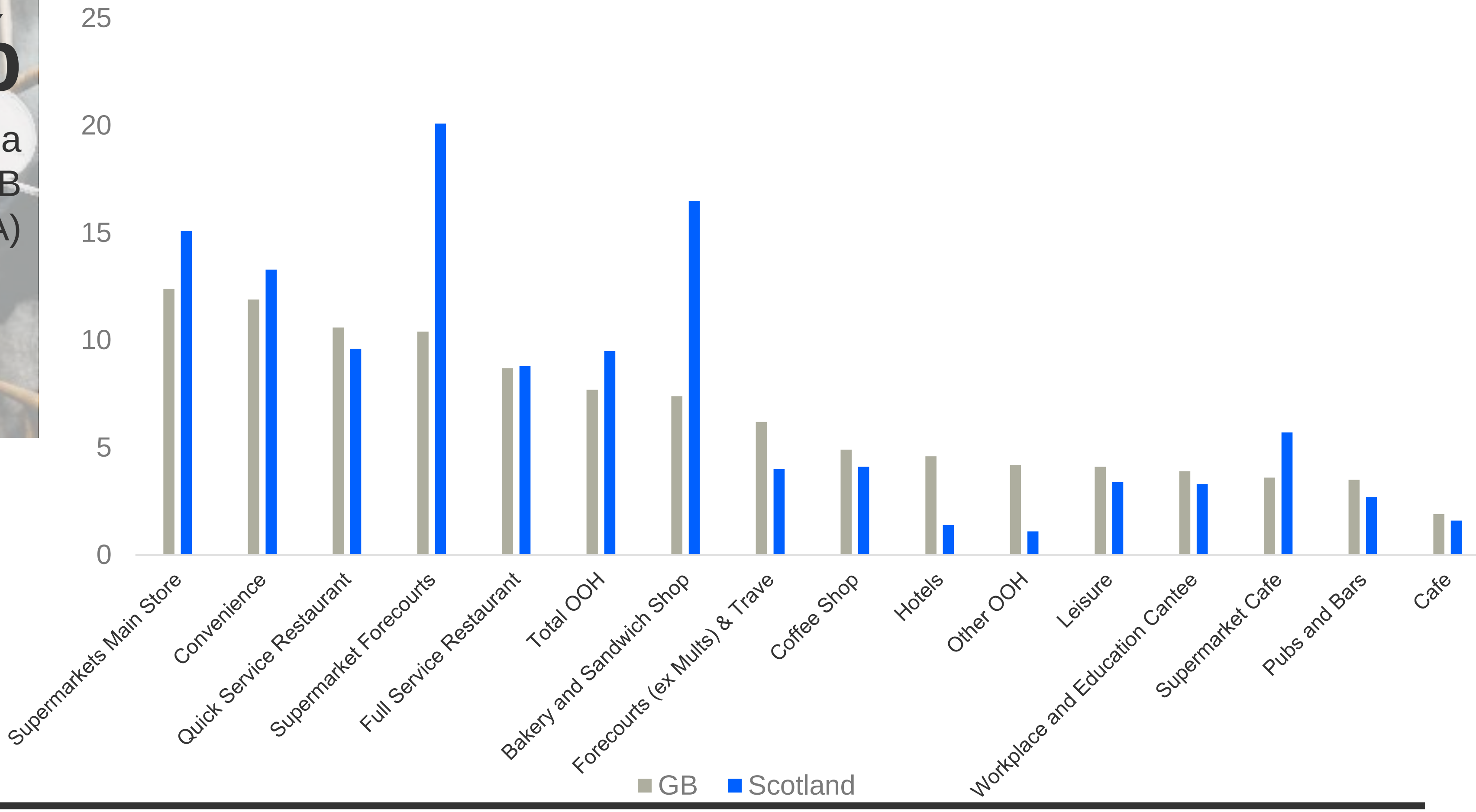


Kantar Worldpanel OOH usage panel | Health (% share of Occasions) | GB vs Scotland | 52 w/e 29 Dec 19

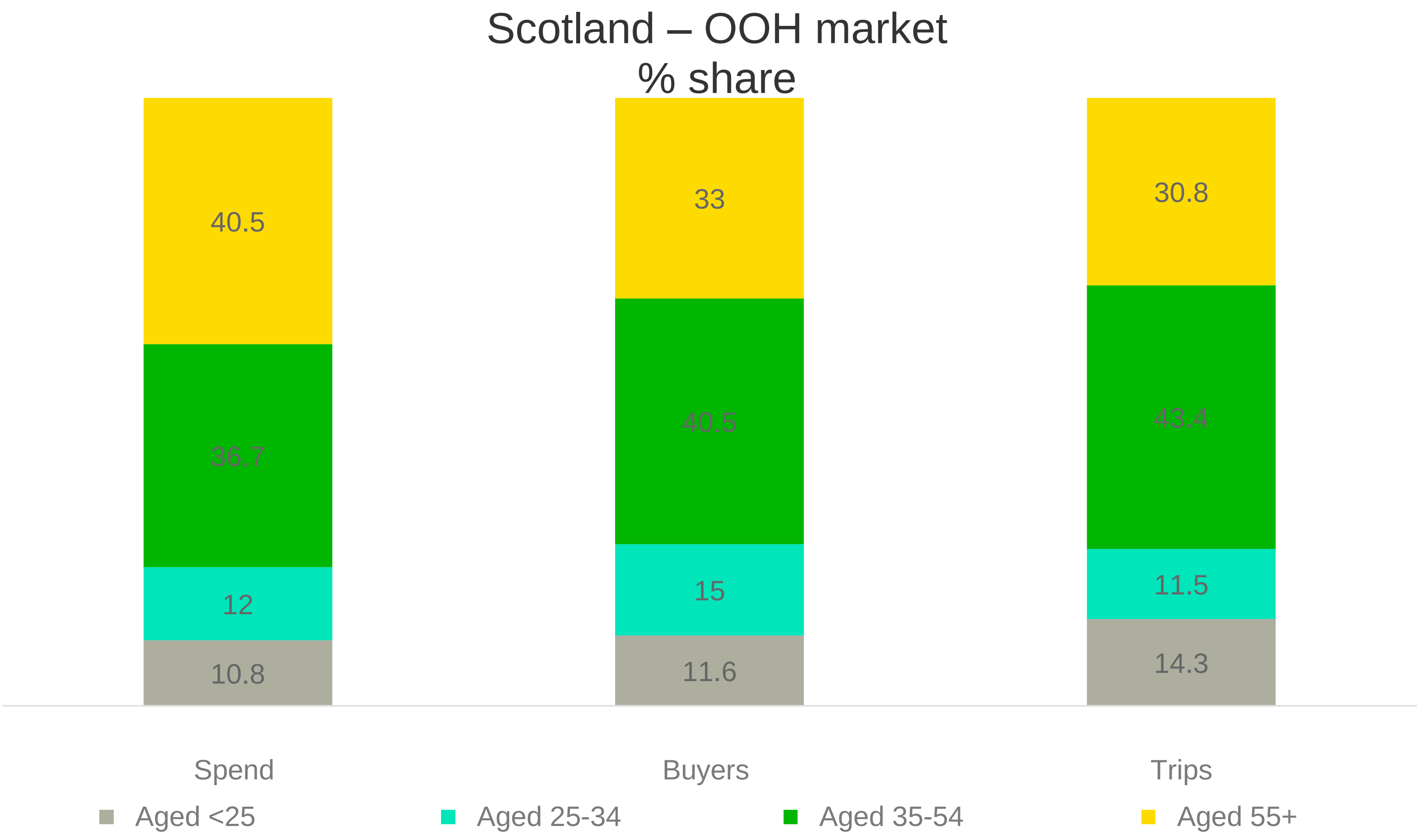
Consumers are more engaged in promotions in Scotland than total GB, in almost every channel



Trips featuring a promotion (% share)



In Scotland, consumers aged 55+ make up the highest proportion of spend, whilst ages 35-54 make up the highest proportion of buyers and trips



Summary

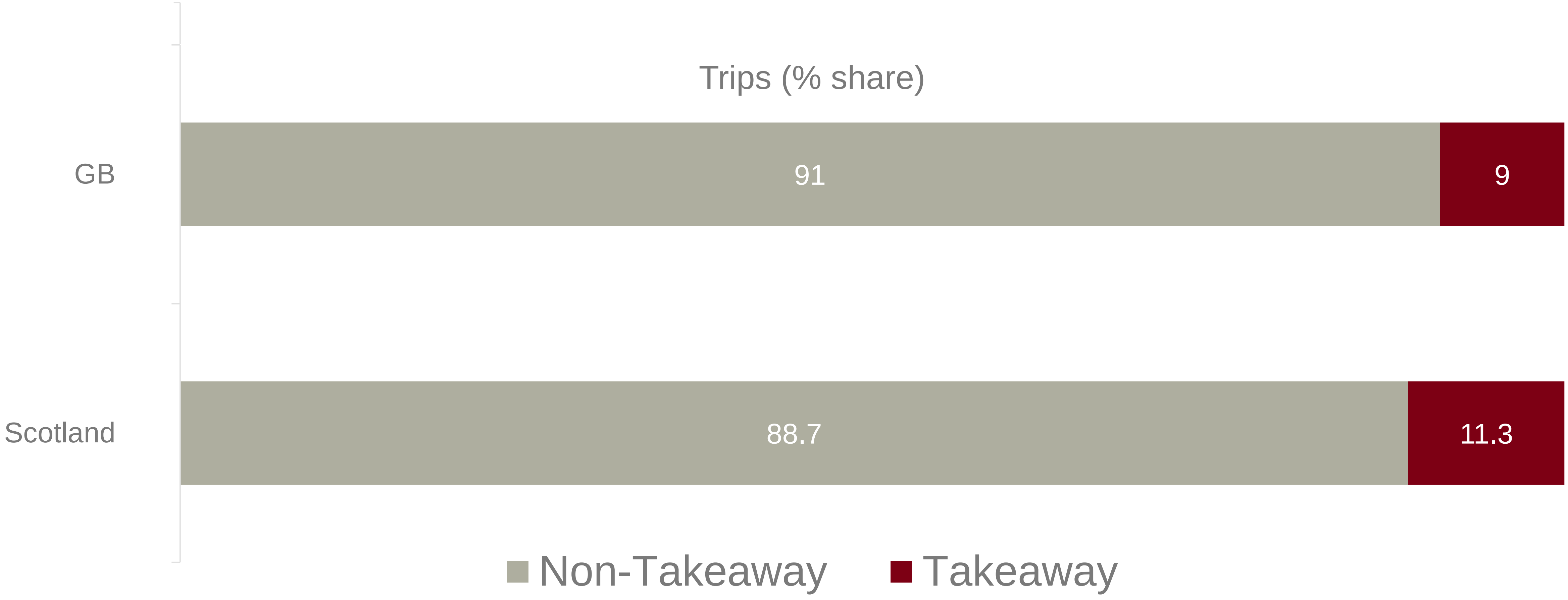
1 In Scotland, people spend around £4.6bn a year in the OOH market. On average people visited OOH around four times a week spending £2.34 per item.

2 Around 75% of visits in Scotland are made to convenience stores, bakery and sandwich shops, supermarkets, quick service restaurants, workplace and education canteens, coffee shops and cafes.

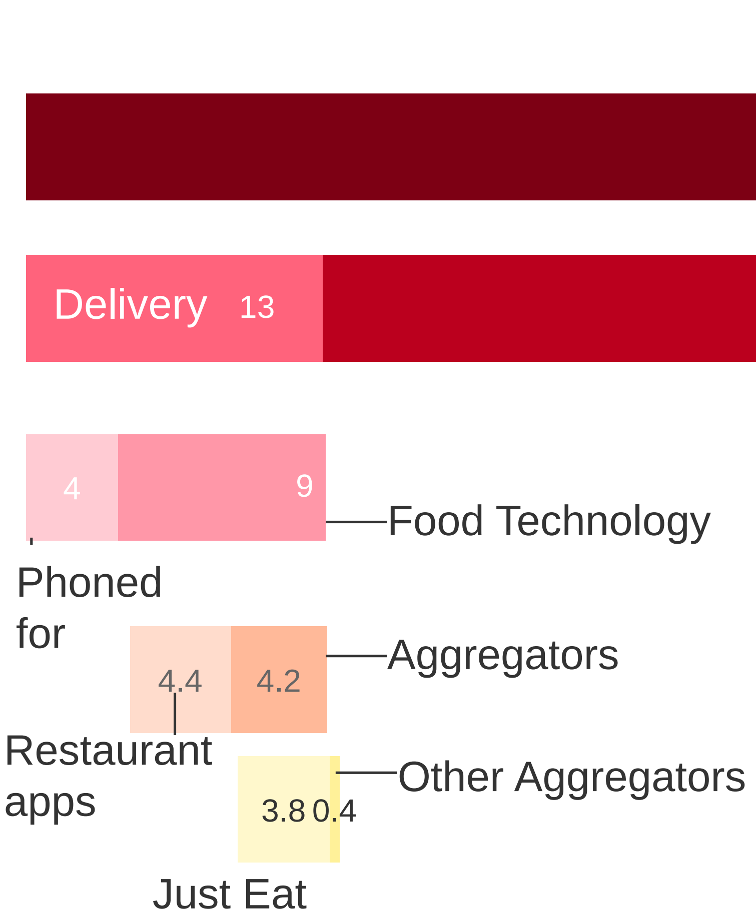
3 Health is becoming increasingly important to consumers OOH, especially in Scotland

Delivery & Takeaway

Takeaways account for 9% of trips in GB and a 11% of trips in Scotland

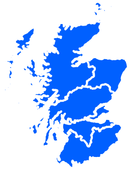


As the delivery market in Scotland has developed there are a variety of methods for ordering and delivering takeaways

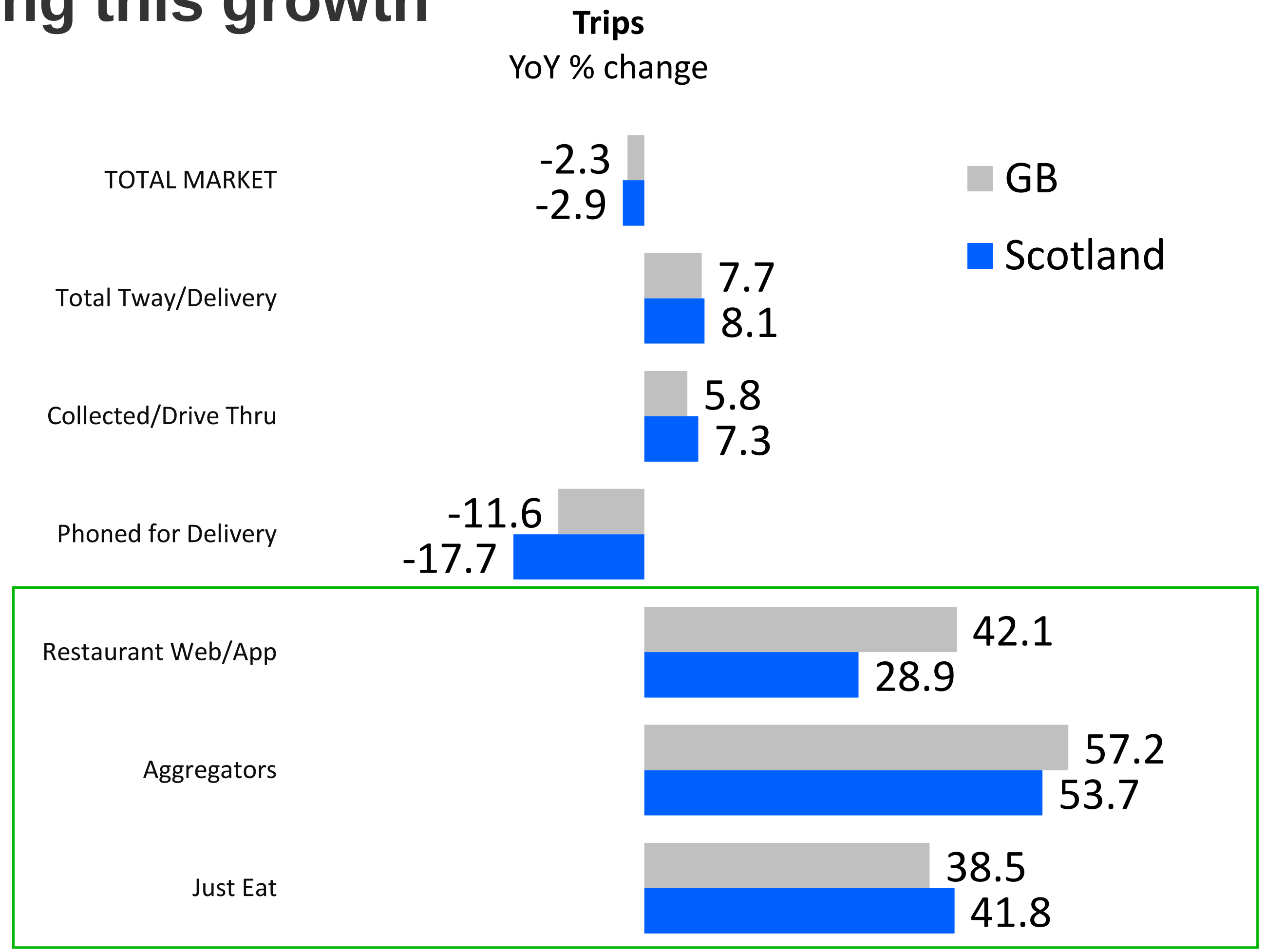


Although aggregators are growing rapidly, they are concentrated in cities which limits their presence

In Scotland more people are buying takeaway compared to the previous year, but are spending less

	Spend	Trips per Person	Penetration	Spend per trip
Total GB 	**£8.2bn** (+6.3% YoY)	**28.5 per year** (+1.8% YoY)	**75%** (+5.1% YoY)	**£7.61** (-1.3% YoY)
Scotland 	**£820m** (-1.6% YoY)	**31.8 per year** (Flat)	**76.2%** (+7.8% YoY)	**£7.64** (-9% YoY)

However, for GB and Scotland the takeaway market bucks the total market trend as it grows through increased trips, with emerging delivery food technology driving this growth



Food technology driving takeaway's growth

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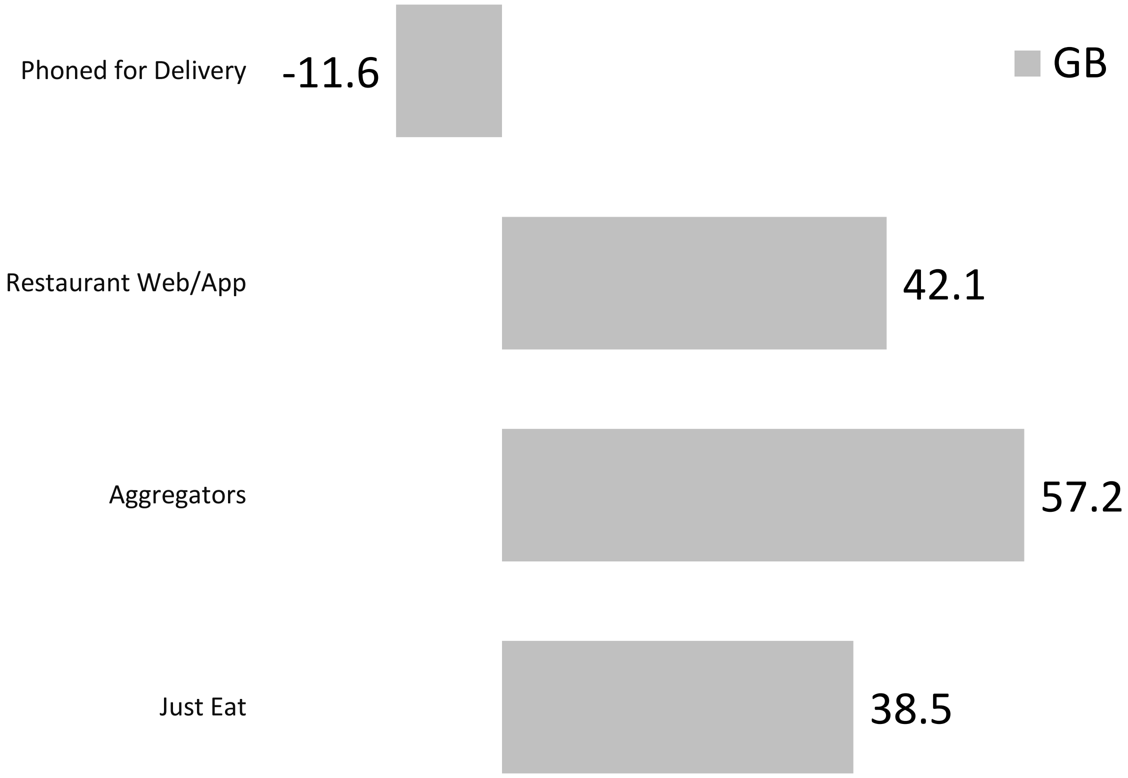
Kantar Worldpanel Out of Home Purchase | GB vs Scotland | Takeaway methods | Spend YoY % Change | 52 w/e 29 Dec 19
Kantar OOH Usage | GB | Main Meal | Delivery vs total OOH | 52 w/e 29 Dec 19

In GB these delivery occasions hit a more enjoyable, social and celebratory need than other OOH experiences

Delivery Trips
YoY % change



Delivery main meal
% occasions
ix. vs total OOH

Social
15%
ix. 140

Celebration
7.3%
ix. 429

Treat
5.9%
ix. 128

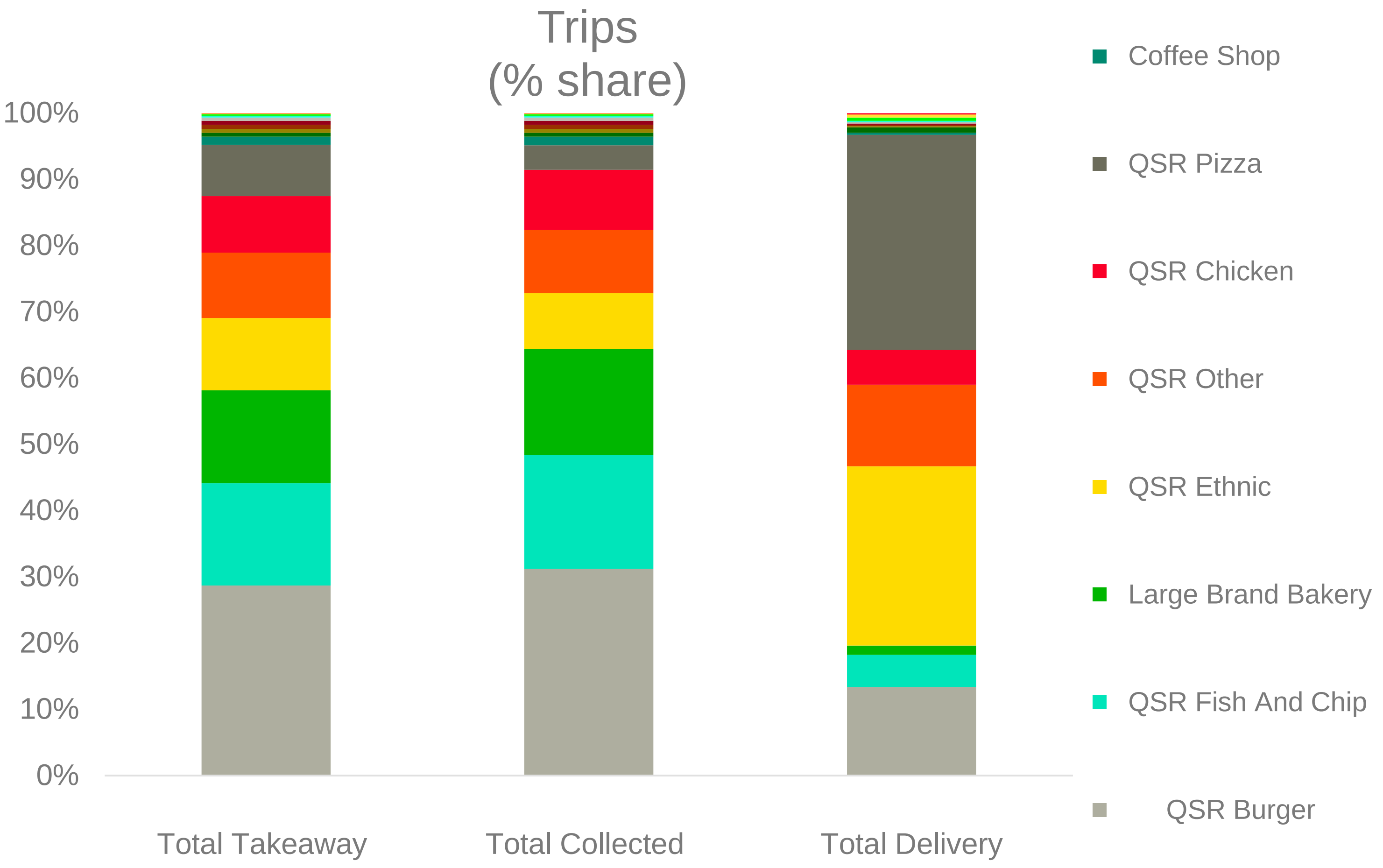
Kantar Worldpanel Out of Home Purchase | GB | Takeaway methods | Spend YoY % Change | 52 w/e 29 Dec 19
Kantar OOH Usage | GB | Main Meal | Delivery vs total OOH | 52 w/e 29 Dec 19

76%

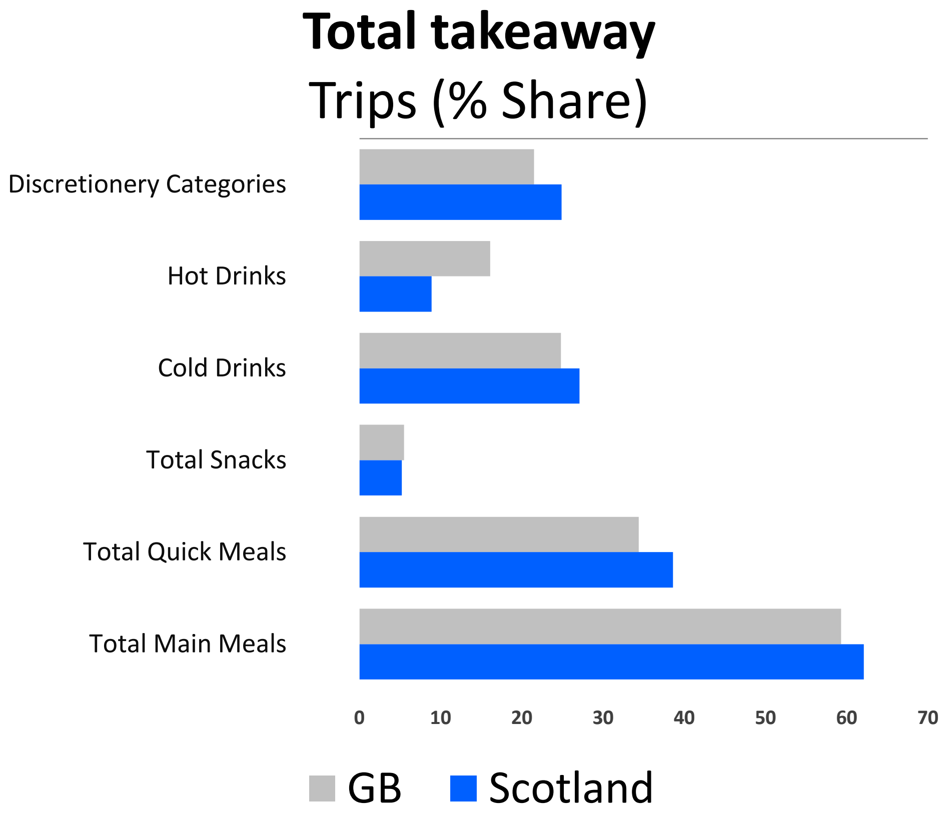
of spend on delivery is incremental to the OOH market

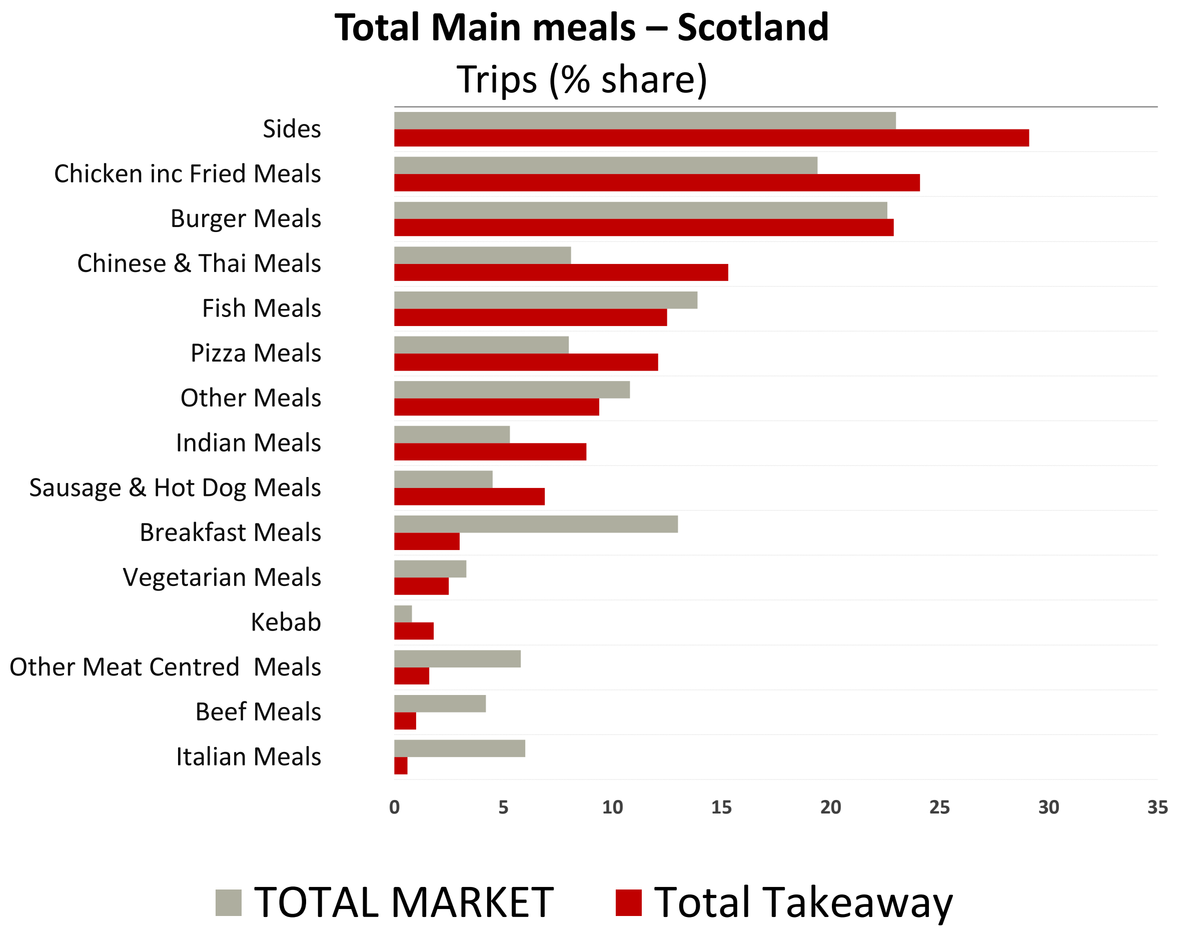
Delivery is not cannibalising OOH spend, consumers are largely adding delivery to their OOH repertoire rather than replacing existing OOH trips with delivery occasions

In GB outlets differ by takeaway method, burgers are more likely to be collected via drive through, while pizza and ethnic outlets rely more on delivery



In Scotland consumers are most likely to purchase main meals when ordering takeaway, mainly, chicken, burger and Chinese/Thai meals





Half of takeaway occasions are from branded outlets, with McDonalds coming top for both GB and Scotland

GB

55%

of total takeaway trips are from branded outlets
ix. 110 vs total OOH

Top outlets for Total Collection/delivery:

1. McDonalds
2. KFC
3. Subway
4. Greggs
5. Dominos

Scotland

54%

of total takeaway trips are from branded outlets
ix. 107 vs total OOH

Top outlets for Total Collection/delivery:

1. McDonalds
2. Subway
3. Greggs
4. KFC
5. Dominos

Branded outlets become less important for delivery, particularly in Scotland, as smaller takeaway outlets do not offer a collection/drive through service

GB

40%

of total delivery trips are from branded outlets
ix. 72 vs total OOH

Top outlets for delivery:

1. McDonalds
2. KFC
3. Subway
4. Greggs
5. Dominos

Scotland

26%

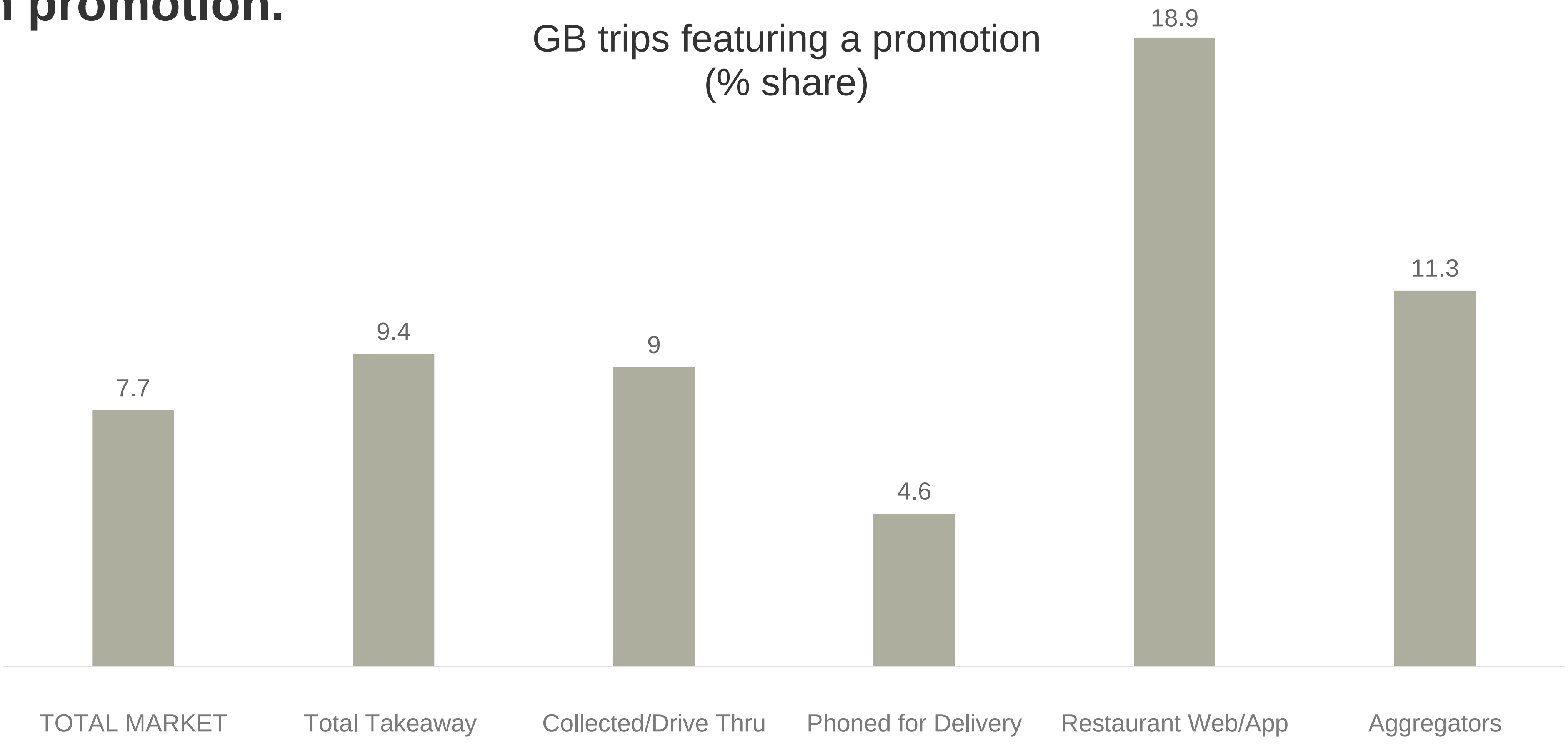
of total delivery trips are from branded outlets
ix. 52 vs total OOH

Top outlets for delivery:

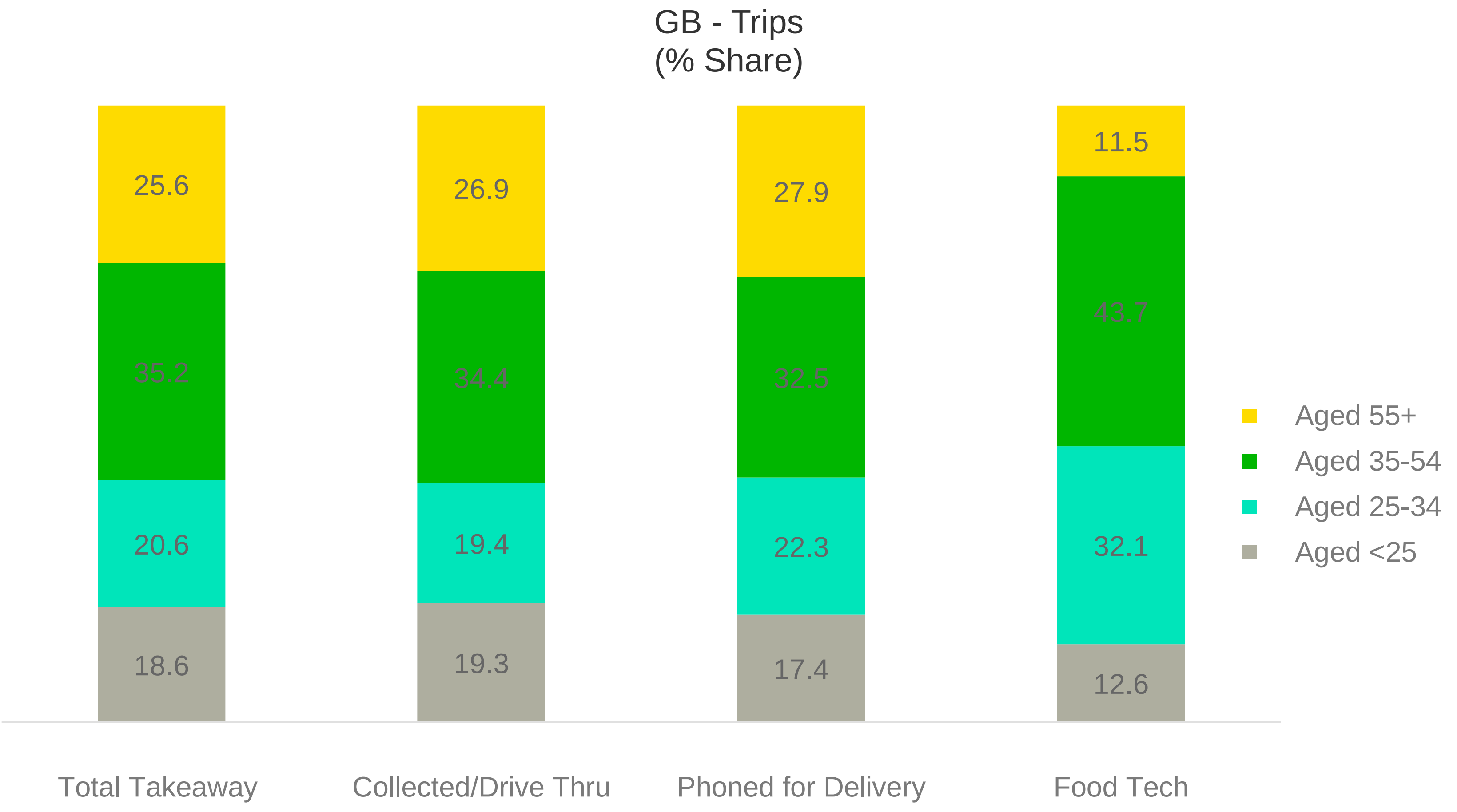
1. Dominos
2. McDonalds
3. Pizza Hut
4. KFC
5. Subway

Kantar Worldpanel Out of Home Purchase | GB vs Scotland | Total| Delivery Branded outlets | Trips (% share) | 52 w/e 29 Dec 19

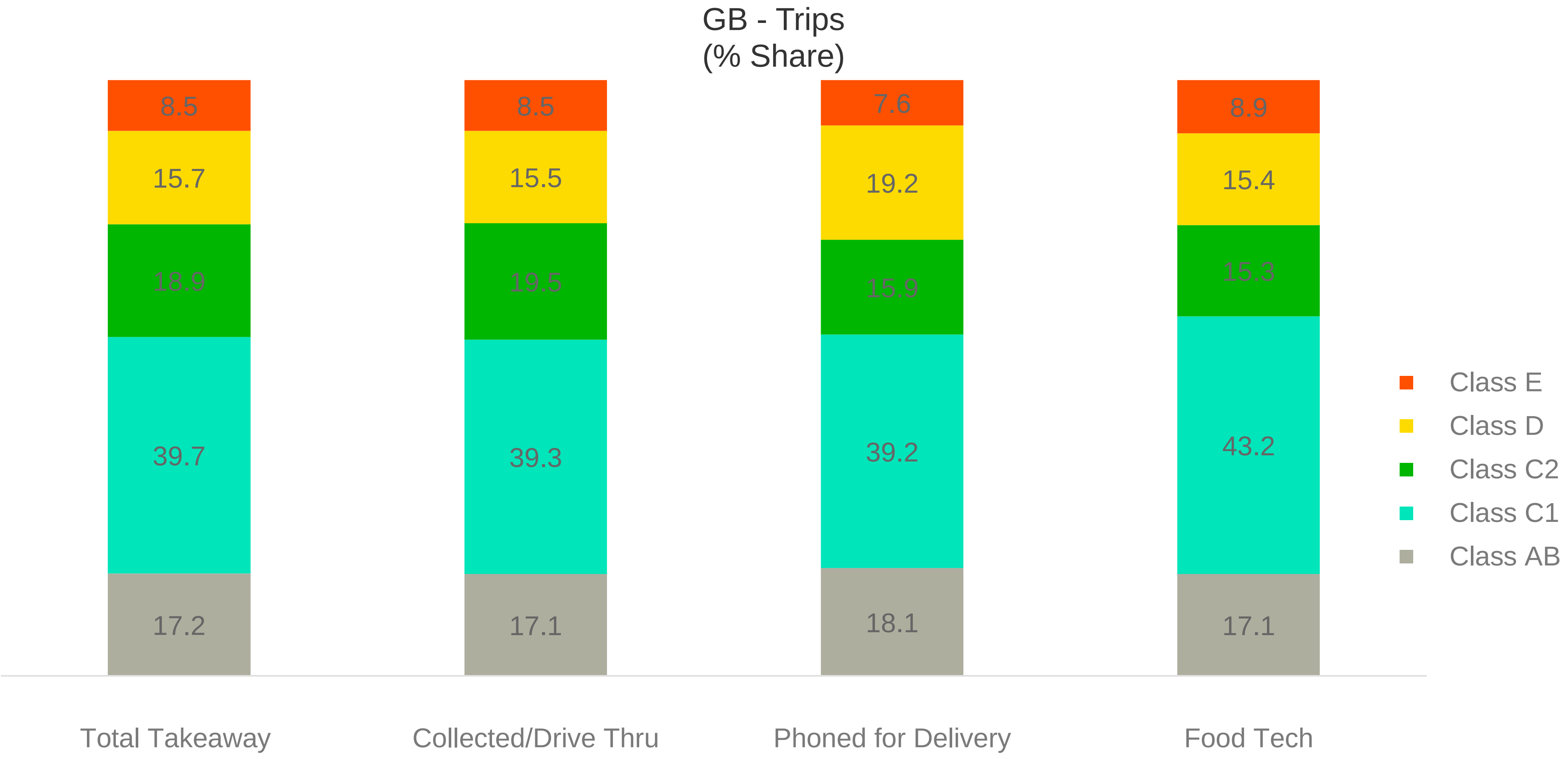
In GB promotions are more likely to be used on takeaways compared to the total market, with restaurant websites/apps having the highest proportion of trips on promotion.



In GB, the % share of trips is similar across all delivery platforms for age. However, younger consumers appear to be particularly engaged with food technology



In GB, the % share of trips is similar across all delivery platforms for social class



Summary

1. Takeaways account for about 11% of total OOH trips in Scotland with £820m spent annually, with an average of 32 trips per person.

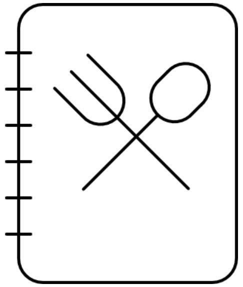
2. Emerging food technology delivery apps and aggregators are driving the growth of the Scottish takeaway market.

3. In Scotland, the most popular meals ordered by takeaway are chicken, burger Chinese & Thai meals.

4. In GB, promotions are more likely to be used on takeaways compared to the total market, particularly via restaurant websites and apps.

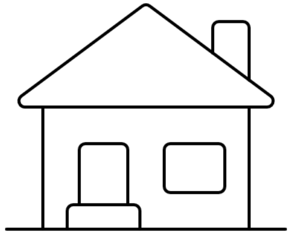
Food on the go

Using our usage panel, we find out where people have consumed their food. There are three main locations people can consume food bought OOH



Consumed on premise

The consumer has bought the food and eaten in-store, e.g. restaurant meal or coffee drunk in store



Consumed at home

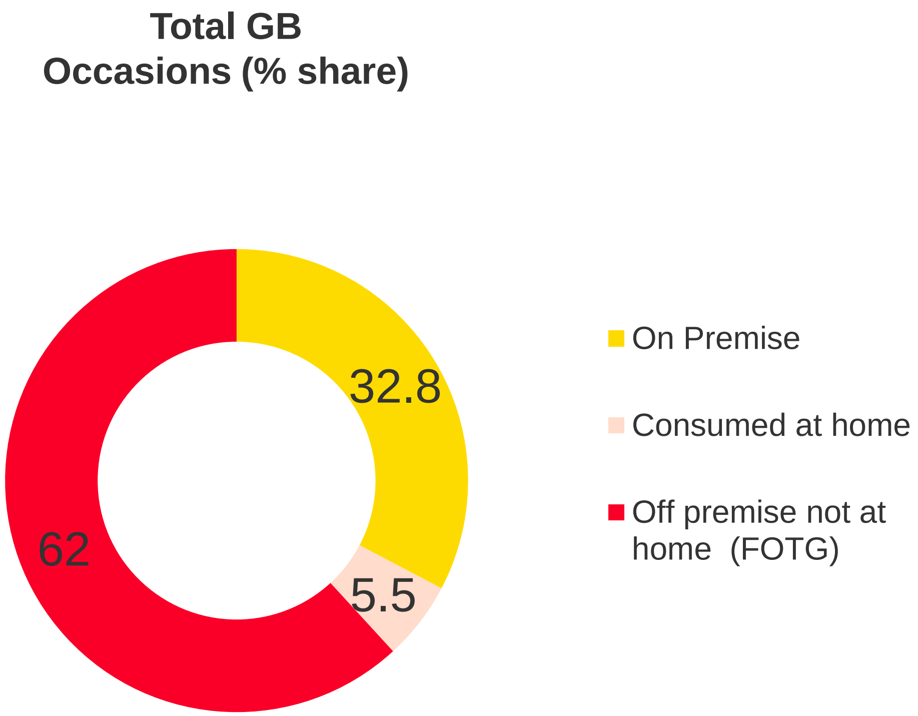
This makes up a small proportion of the market, takeaway accounts for majority of these occasions

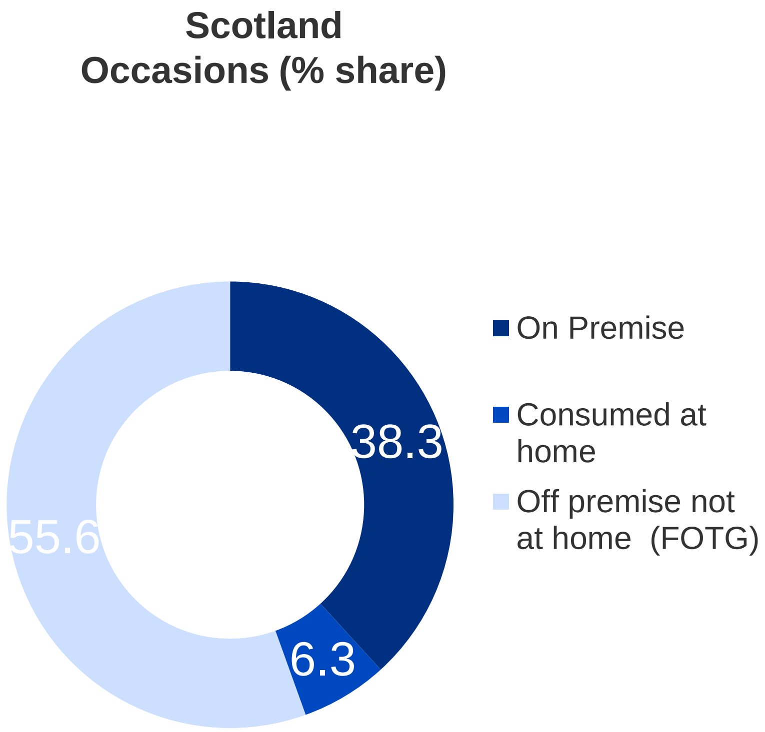
Consumed off premise (“Food on the Go”)

Food purchased and consumed OOH but taken away from the store, this section focuses on these occasions

Note: The data uses out usage panel to determine where someone has bought and consumed an item. An occasion is defined by the consumption moment. one occasion could include a variety of products eg. If you bought a coffee from Starbucks and a Greggs sausage roll, it would count as 2 purchase trips but one usage occasion which accounts for slight differences in this section compared to previous sections

“Food on the go” occasions account for the majority of occasions in the OOH market





As consumers in GB are making fewer trips OOH, they are cutting out the cheaper “on the go” occasions, suggesting they are saving their spend for more expensive dining occasions

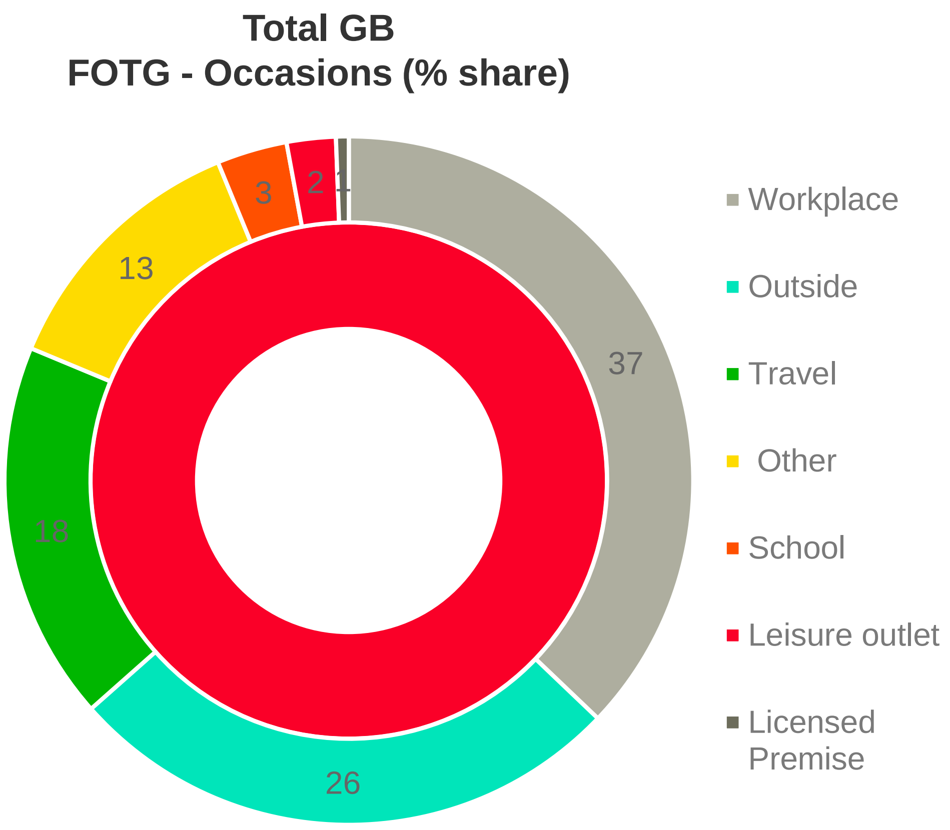
Trips YoY % Change
Spend per trip

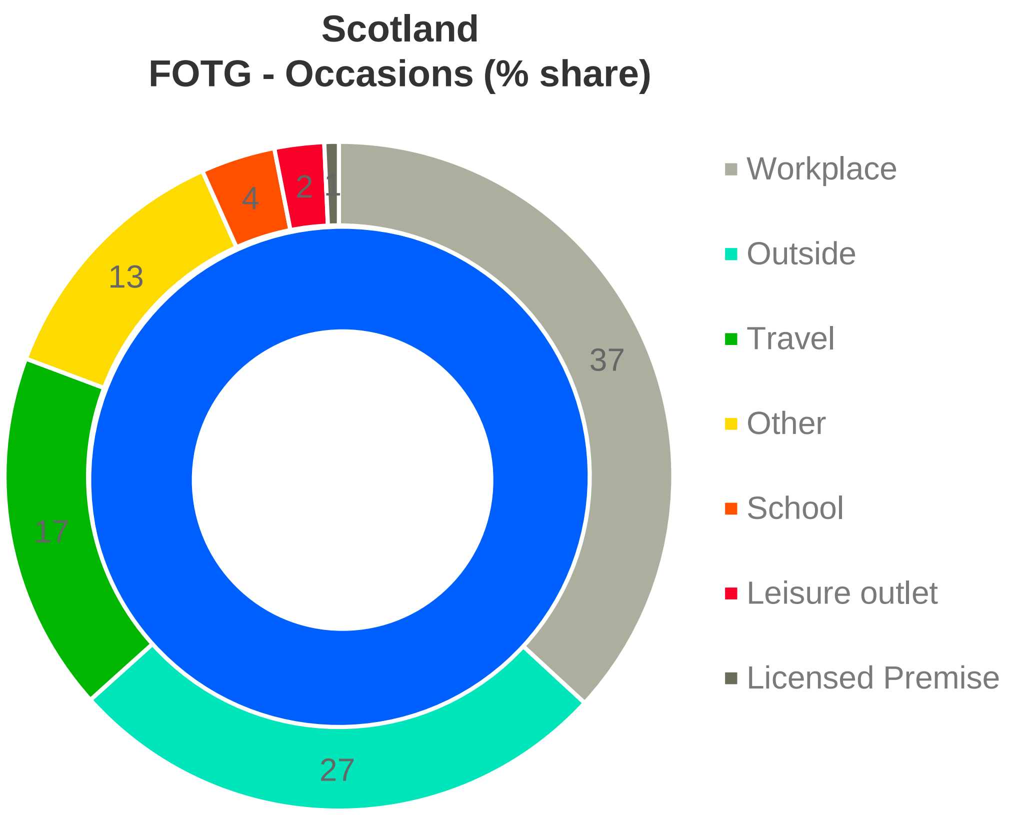
	Consumed on premise	Consumed at home	Consumed off premise (Food on the Go)
Trips YoY % Change	+6.1%	+3.1%	-5%
Spend per trip	£7.22	£8.58	£2.54

Kantar Worldpanel Out of Home Usage | GB | Total OOH | Where consumed? | Occasions (YoY % change) | 52 w/e 29 Dec 19

Kantar Worldpanel Out of Home Usage | GB | Categories| Consumed off premise not at home | Occasions (% share) | 52 w/e 29 Dec 19
Note: these % differ slightly from the graphs in the OOH overview as this uses usage data so occasions are used.
An occasion is defined by the consumption moment. one occasion could include a variety of products eg. If you bought a coffee from Starbucks and a Greggs sausage roll, it would count as 2 purchase trips but one usage occasion

The majority of food and drink consumed “on the go” in GB and Scotland are consumed in the workplace and outside





The “Food on the go” market is declining in GB and Scotland, with the decline accelerated in Scotland

	Spend	Trips per Person	Penetration	Spend per item
Total GB	£18.9bn (-3.4% YoY)	151 per year (-5.4% YoY)	96.7% (-0.1% YoY)	£1.54 (+4.8% YoY)
Scotland	£1.4bn (-9.8% YoY)	131 per year (-3.8 YoY)	98.5% (-0.1% YoY)	£1.64 (+2.5% YoY)

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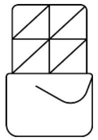
Kantar Worldpanel Out of Home Usage | GB vs Scotland | Total OOH | Consumed off premise not at home | GB| 52 w/e 29 Dec 19

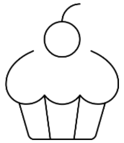
In GB sweet snacks and quick meals are more likely to be consumed “on the go”, compared to the total OOH market

Product
Total FOTG trips (% share)
ix. Vs total OOH

Sweet snacks
ix. 134



Confectionery
14.5%
ix. 158



Cakes, pastries & Biscuits
9.2%
ix. 114

Quick meals
ix. 107

Sandwiches
18.3%
ix. 118

Savoury pastries
6%
ix. 121

Kantar Worldpanel Out of Home Usage | GB | Categories| Consumed off premise not at home | Occasions (% share) | 52 w/e 29 Dec 19
Note: these % differ slightly from the graphs in the OOH overview as this uses usage data so occasions are used.
An occasion is defined by the consumption moment. one occasion could include a variety of products eg. If you bought a coffee from Starbucks and a Greggs sausage roll, it would count as 2 purchase trips but one usage occasion.
Note fruit makes up only a small proportion of visits for FOTG

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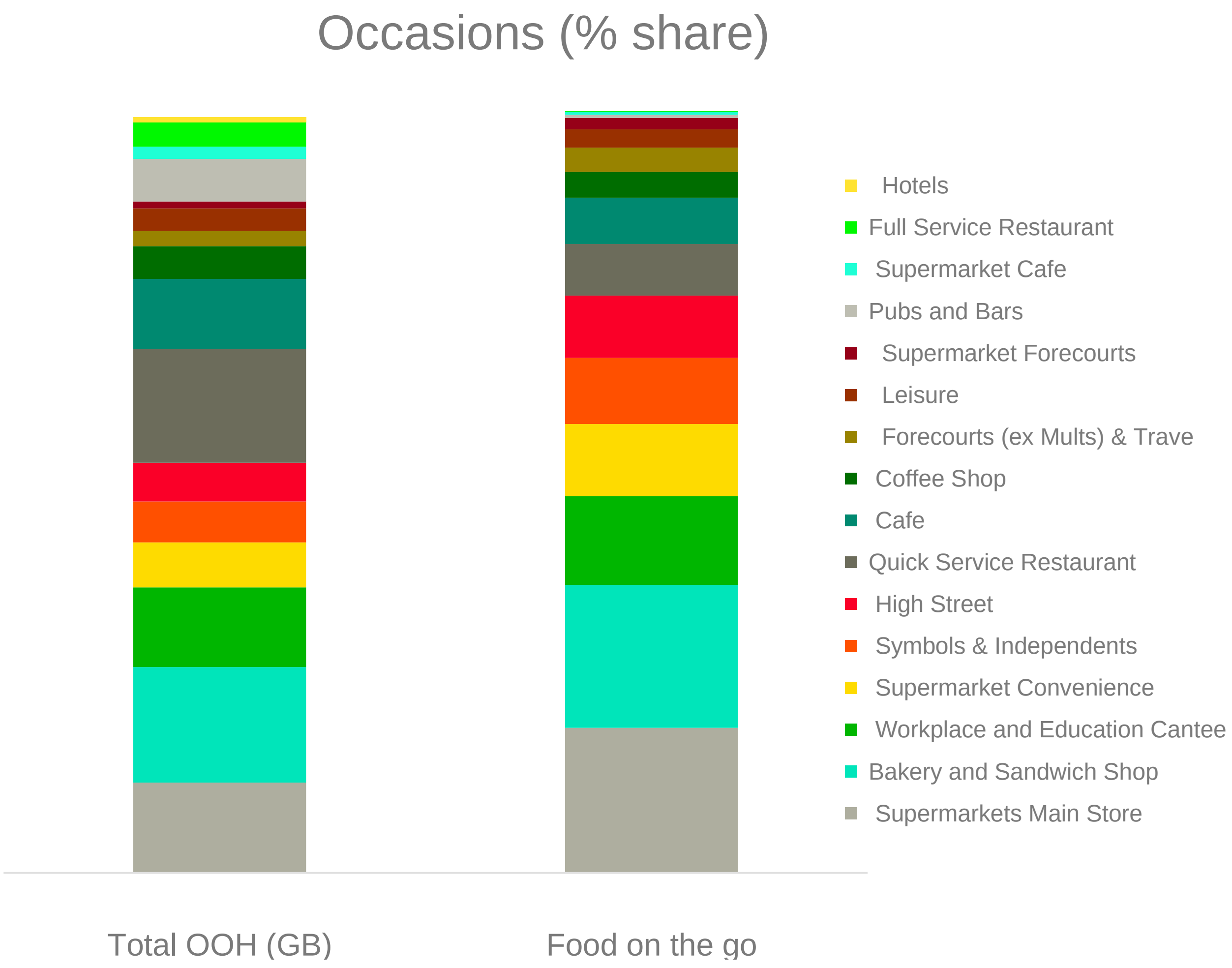
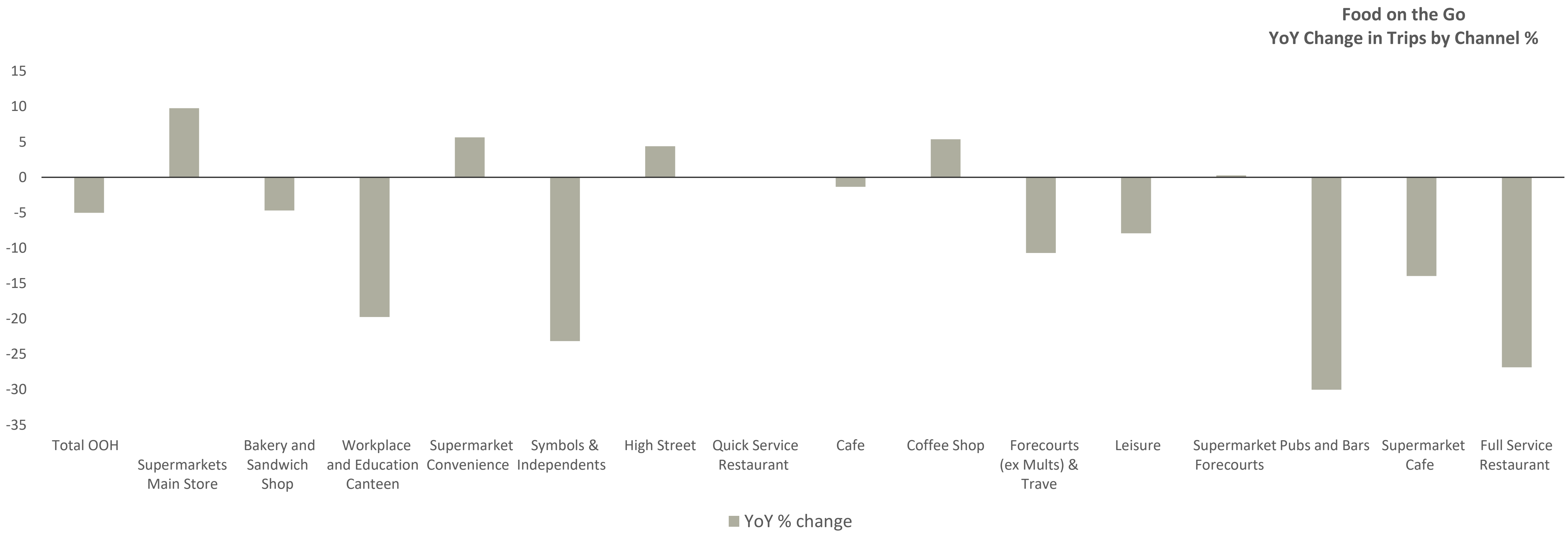
In GB convenience led outlets, particularly supermarkets and bakery and sandwich outlets, are visited more "on the go" compared to the total OOH market



Supermarkets are the main channel driving growth in GB as they expand their “on the go” offerings



In GB, supermarkets are driving growth by expanding their “on the go” offerings, for example coffee machine stations and bakery partnerships

Sainsbury’s

Caffeine Hit
Non Branded
Coffee machines
and stations at
Sainsbury’s

Coffee is
growing strongly
in supermarkets
+19%

Asda & Greggs

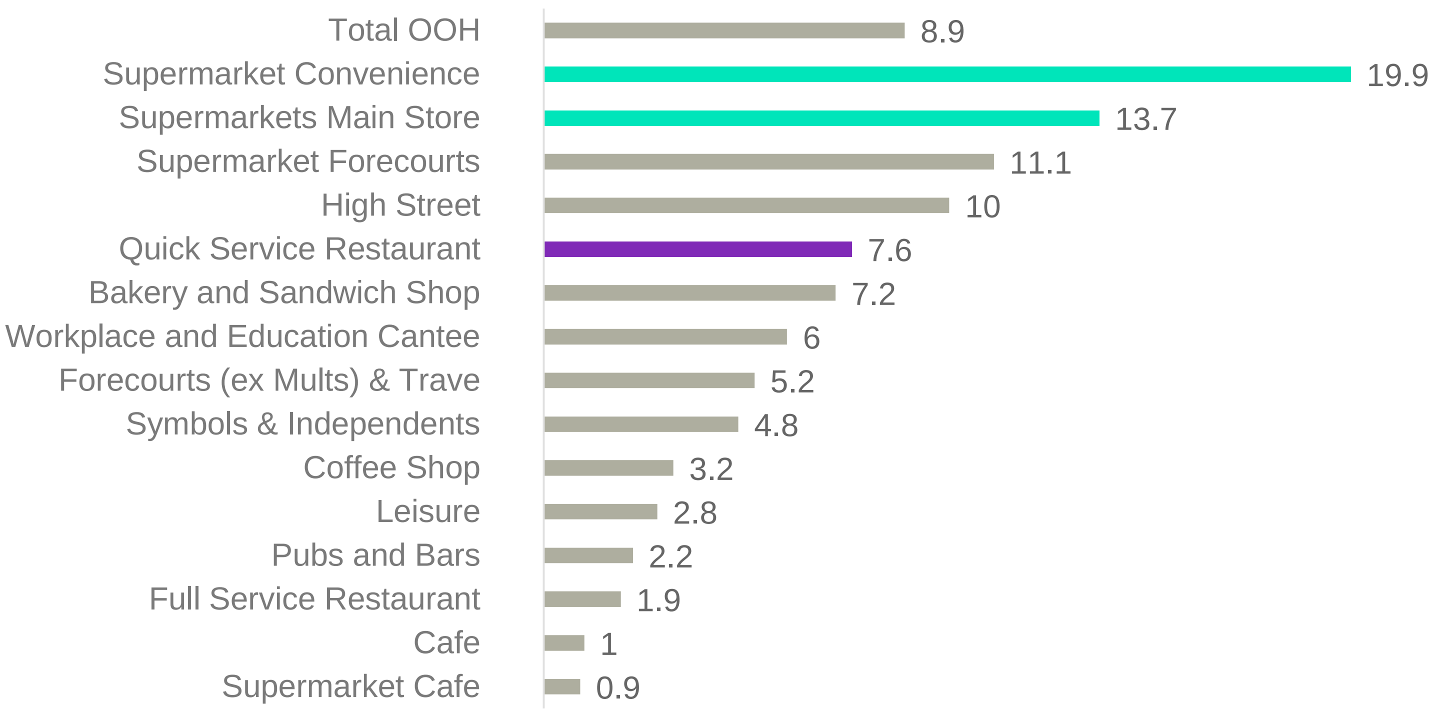
In store branded partnership
Between Asda and
Greggs

Savoury pastries are
growing in
supermarkets
+1.6%

of Asda’s OOH customers
have also visited Greggs

Meal deals make up a large proportion of supermarket front of store offerings in GB, and this channel has the highest proportion of trips on promotion

FOTG
Trips featuring a promotion (% share)



Top products sold on promotion
% trips featuring a promotion

Supermarket:
- **Convenience**
- **Main store:**

Juice & Juice drinks
- 46.6%
- 43.6%

Crisps, Savoury Snacks & Popcorn
- 54.9%
- 39.8%

Sandwiches
- 42.3%
- 27.5%

Quick service restaurant:

Burger meals
19.9%

Vegetarian meals
18.8%

Salads
17.8%

Carbonates
16.9%

Kantar Worldpanel Out of Home Usage | GB| Total OOH | Consumed off premise not at home | Occasions ft a promotion (% share) | 52 w/e 29 Dec 19

Meal deals make up a large proportion of supermarket front of store offerings in GB, and this channel has the highest proportion of trips on promotion

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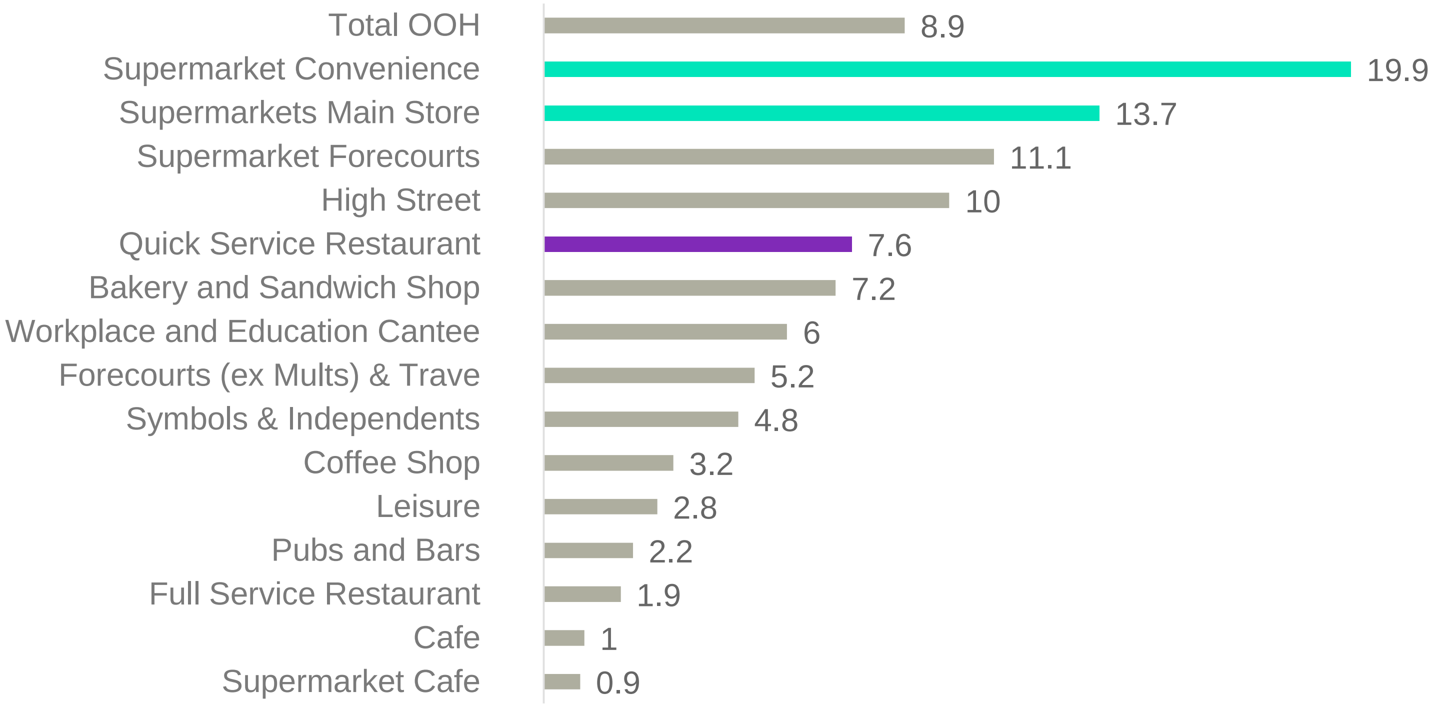
Trips featuring a promotion (% share)



Top products sold on promotion
% trips featuring a promotion

Supermarkets:

Crisps, Savoury Snacks & Popcorn
45.5%

Juice & Juice drinks
45%

Sandwiches
33%

Quick service restaurant :

Burger meals
19.9%

Vegetarian meals
18.8%

Salads
17.8%

Carbonates
16.9%

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Kantar Worldpanel Out of Home Usage | GB| Total OOH | Consumed off premise not at home | Occasions ft a promotion (% share) | 52 w/e 29 Dec 19

In GB consumers aged 35-54 contribute the highest proportion of “food on the go” occasions

Summary

1 In Scotland the FOTG market accounts for the majority of OOH occasions, where on average each person makes around 131 trips per year spending £1.64 per trip.

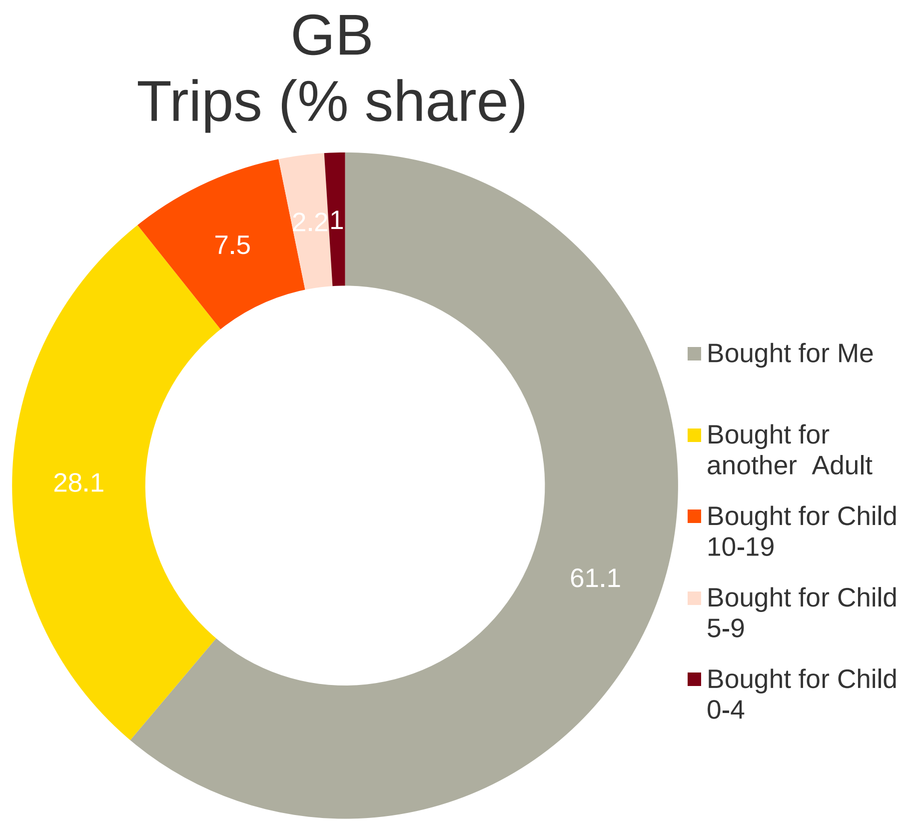
2 The majority of food and drink consumed at FOTG occasions in Scotland are consumed in the workplace or outside.

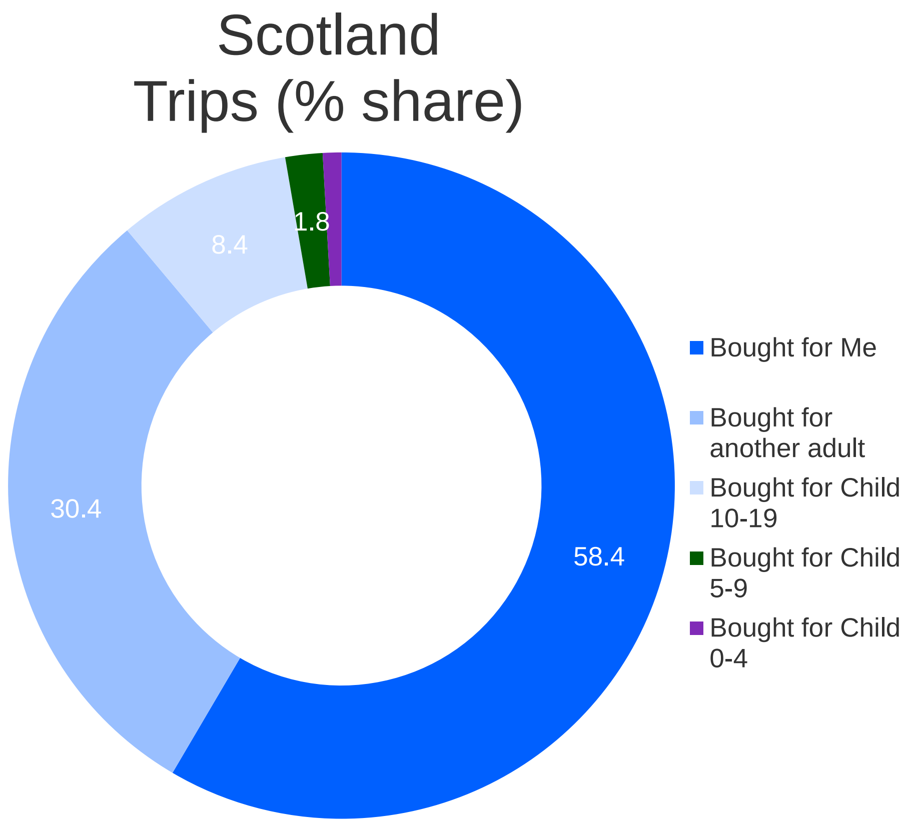
3 In GB, convenience led outlets are the most common places for FOTG, with sweet snacks and quick meals being the most popular types of food.

4 Supermarkets are driving growth by expanding their “on the go” offerings in GB, for example coffee machine stations and bakery partnerships.

Children’s consumption

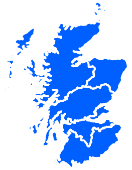
Purchasing for children makes up 10% of OOH trips in GB and slightly more in Scotland



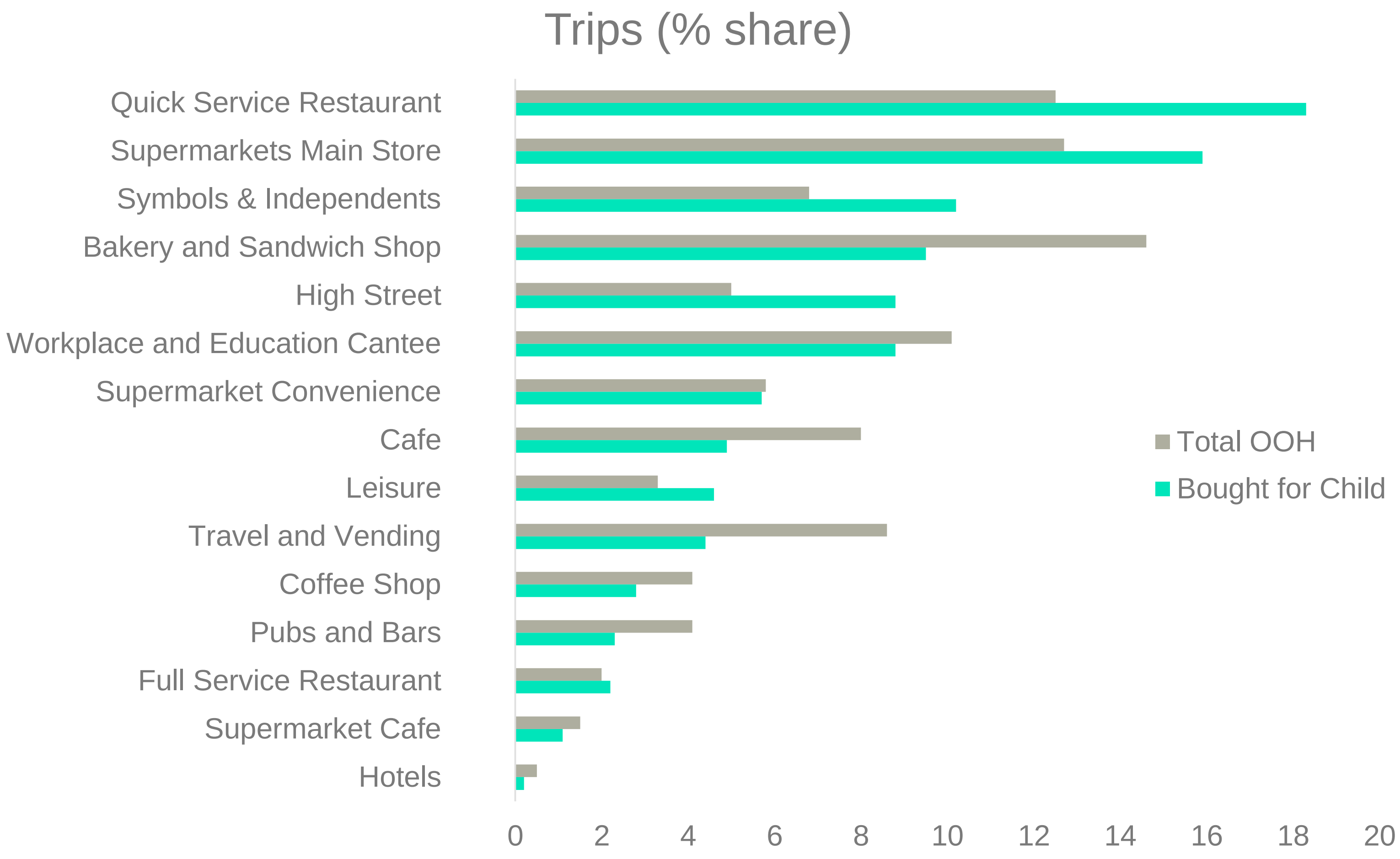


Kantar Worldpanel OOH Purchase | GB vs Scotland | Who bought for? | Trips (% share) | 52 w/e 29 Dec 19
Bought for adult is an occasions when someone has bought something for another adult

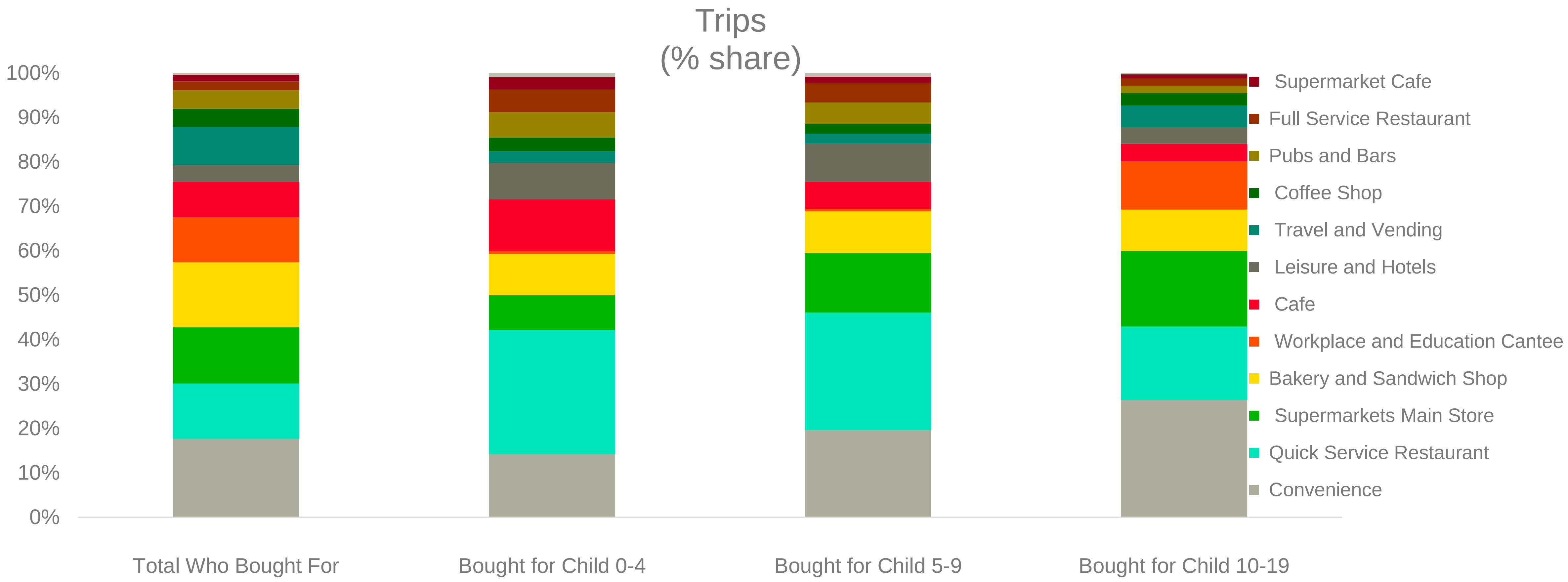
In Scotland spend on children OOH is declining, while in GB it grows through increased trips

	Spend	Trips per Person	Penetration	Spend per item
Total GB 	**£5.7bn** (+7.5% YoY)	**65.2 per year** (+4.0% YoY)	**55.8%** (Flat)	**£3.07** (+2.7% YoY)
Scotland 	**£515m** (-6.7% YoY)	**59.1 per year** (+3.1% YoY)	**54.6%** (+5.8% YoY)	**£3.61** (-14.7% YoY)

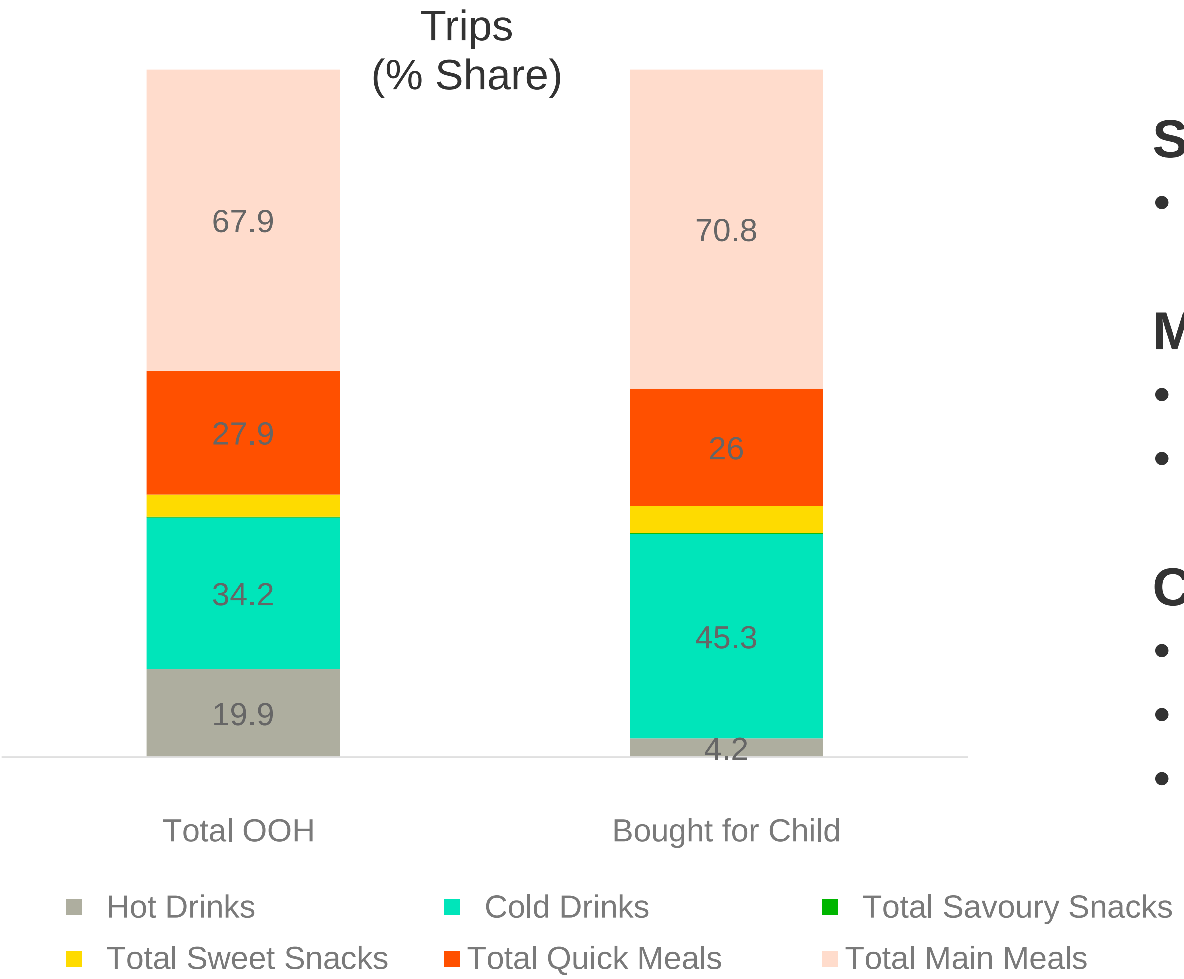
Convenience retail and Quick Service Restaurant outlets are more important when consumers are buying for children in GB



In GB there are differences in outlets across different age groups, younger children are more likely to be bought items from QSRs while convenience outlets become more important when buying for older children



In QSRs, children in GB are more likely to be bought ice cream, chicken meals and cold drinks (but not carbonates)



Trips (% share)
ix. Vs total QSR

Sweet Snacks

- Ice cream (4.5%, ix. 136)

Main Meals

- Chicken Meals (30.3%, ix. 186)
- Sides (39.2%, ix. 129)

Cold Drinks

- Juice and Smoothies (7.7%, ix. 226)
- Dairy Drinks (9.4%, ix. 192)
- Water (3.9%, ix. 163)

In GB children are more likely to go to branded outlets, particularly McDonalds

% share of child QSR trips
ix. Vs total QSR

65.4%
of children's QSR trips
are to branded outlets
ix. 111 vs total QSR

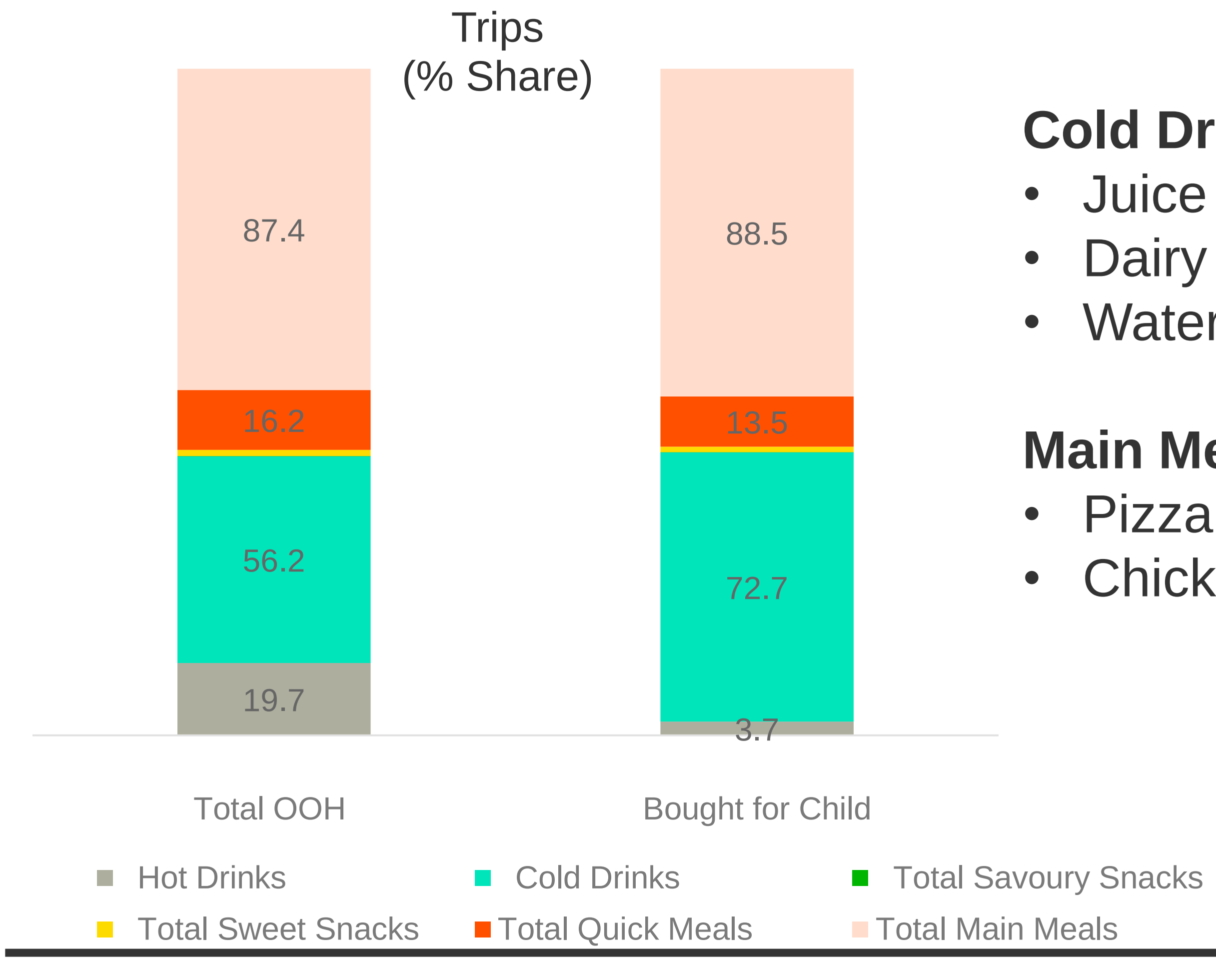
McDonalds
47.4%
ix. 117

KFC
9.5%
ix. 103

Burger King
3.3%
ix. 92

Dominos
2.9%
ix. 104

Similarly, in Full Service Restaurants children in GB are more likely to be bought juice, water and dairy drinks, and pizza and chicken meals



Trips (% share)
ix. Vs total FSR

Cold Drinks

- Juice and Smoothies (16.3%, ix. 201)
- Dairy Drinks (5.4%, ix. 270)
- Water (13.7%, ix. 111)

Main Meals

- Pizza Meals (21.1%, ix. 147)
- Chicken Meals (18%, ix. 131)

Therefore, children in GB are more likely to be taken to pizza and chicken outlets

% share of child FSR trips
ix. Vs total FSR

48.9%
of children's FSR trips are to branded outlets
ix. 137 vs total FSR

Nando's
10.9%
ix. 178

Pizza Hut
7.3%
ix. 197

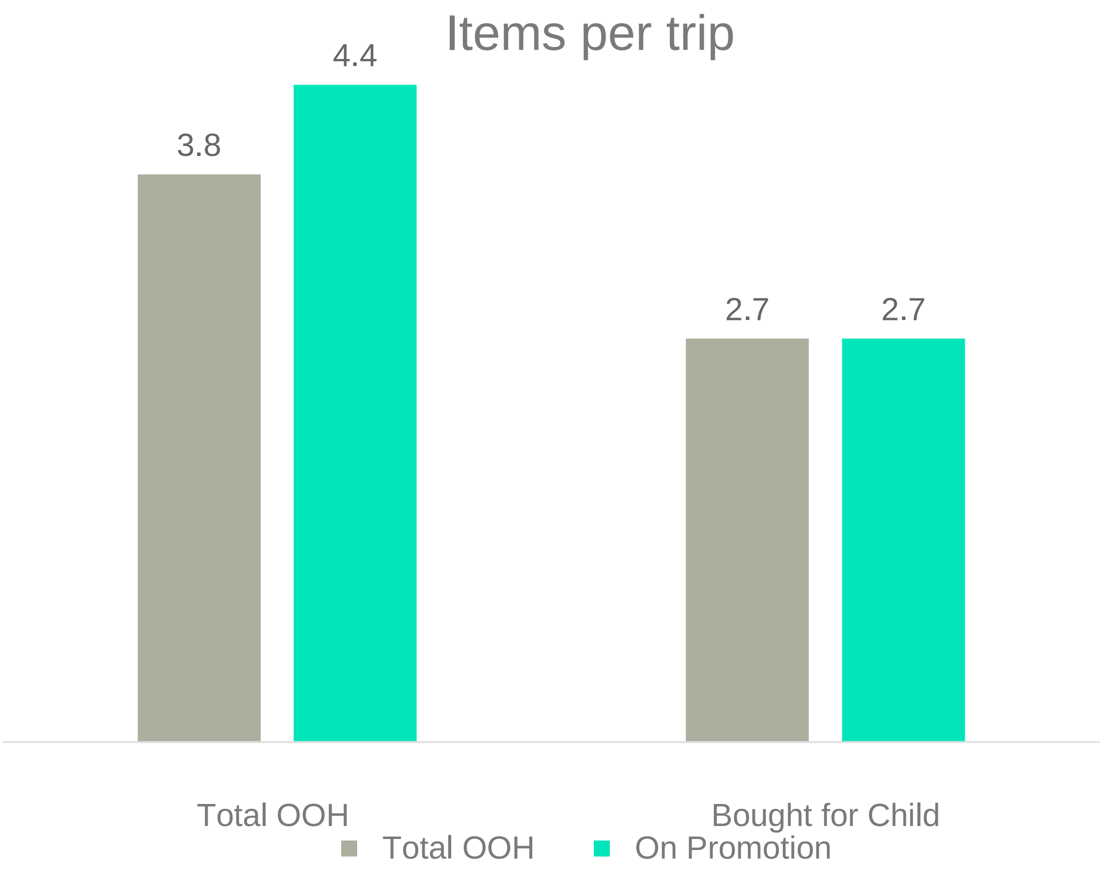
Pizza Express
6.8%
ix. 165

Frankie & Benny's
6%
ix. 162

In GB, when children are present a promotion is more likely to be used, however this doesn’t result in more being bought but reduces the price of a meal

12.5%

of children’s FSR trips feature a promotion ix. 144 vs total FSR



When consumers are eating with children in restaurants in GB, a treat/reward is key, but it also needs to be practical

% of children FSR occasion
ix. Vs total FSR

A treat/reward
28.9%
ix. 133

Easy to come by
9.1%
ix. 140

Quick
7.7%
ix. 133

Summary

1. In Scotland, purchasing for children makes up more than 10% of OOH trips, with an average of 59 trips made yearly and £3.61 spent per item.
2. In GB, convenience retailers and QSRs are the most important when buying for children OOH, with younger children favouring QSRs.
3. In GB, children are more likely to go to branded QSRs, and pizza and chicken outlets are popular FSRs.
4. In GB, a promotion is more likely to be used on visits where children are present, but doesn’t result in more items being purchased.

Key takeout's

1 People in Scotland spend around £4.6bn a year in the OOH market, with around 75% of visits being made to convenience stores, bakery and sandwich shops, supermarkets, quick service restaurants, workplace and education canteens, coffee shops and cafes.

2 Takeaways account for about 11% of total OOH trips in Scotland with emerging food technology driving growth. The most popular meals ordered are chicken, Chinese and Thai meals.

3 In Scotland the FOTG market accounts for the majority of OOH occasions, with food most often being consumed in the workplace or outside. Supermarkets are driving growth by expanding their “on the go” offerings.

4 When purchasing for children, QSRs and convenience stores are more likely to be visited, with children more likely to go to branded QSRs.

Appendix

Retail Channels

- Out of Home
  - Quick Service Restaurant
    - QSR Burger
    - QSR Pizza
    - QSR Chicken
    - QSR Ethnic
    - QSR Fish And Chip
    - QSR Other
  - Full Service Restaurant
    - FS Burger
    - FS Italian
    - FS Chicken
    - FS Ethnic
    - FS Other
  - Coffee Shop and Cafe
    - Coffee Shop
    - Cafe
  - Pubs and Bars
    - Large Brand Pubs & Bars
    - Small and Indep Pubs
  - Bakery and Sandwich Shop
    - Large Brand Bakery
    - Small and Indep Bakery
  - Supermarket FOS & Cafe
    - Supermarkets Main Store
    - Supermarket Cafe
  - Convenience
    - Supermarket Convenience
    - High Street
    - Symbols & Independents
  - Others
    - Leisure and Hotels
      - Leisure
      - Hotels
    - Workplace and Education Canteen
    - Travel and Vending
      - Supermarket Forecourts
      - Forecourts (ex Mults) & Travel
      - Vending
    - Other OOH

QSR = specialising in fast food

FS = typically with table service

Branded definition = named chains brands or ‘other branded outlet’ option, independent classes as all others

Supermarket FOS = Front of Store eg sandwiches, drinks etc

Convenience = outlets focussed on convenience products eg discretionary categories

Leisure =
Tourist Attractions
Garden Centres
Sports Centre/Club
Market Stall
Cinema
Concert/Sports Venue
Gym/Fitness Club
Ice Cream Parlour/Van
Bowling Alley
Shopping Centre
Street Food

Other = Locations not included elsewhere. A very small channel with drinks accounting for over half of purchases

Demographics

Total Demographics	Total Population
Total Gender	*Gender of Individual Buying*
Male	
Female	
Total Individual Age	*Age of Buyer*
Aged <25	*Aged 13-24*
Aged 25-34	*Aged 25-34*
Aged 35-54	*Aged 35-54*
Aged 55+	*Aged 55-79*
Total Presence of Childen	*Total Presence of Childen in Household of Buyer*
No Childen in Household	
Childen Present in Household	
Total Household Size	*Total Household Size of Buyer*
1 Member HHs	
2 Member HHs	
3 Member HHs	
4 Member HHs	
5+ Member HHs	

Total Combined Income	Total Combined Income of Household
£0 - £9999 pa	
£10000 - £19999 pa	
£20000 - £29999 pa	
£30000 - £39999 pa	
£40000 - £49999 pa	
£50000 - £59999 pa	
£60000 - £69999 pa	
£70000 +	
Who Bought For	*Who was the end consumer?*
Bought for Child Only	*Consumer was a Child Only*
Bought for Adult Only	*Consumer was an Adult Only*
Bought for Adult and Child	*Consumer was an Adult and Child*

Total Main Shopper Social Class	*The Social Class of the Main Shopper in the Household, assigned based upon the occupation of the Chief Income Earner. Social Grade is the 'common currency' of social classification used by the advertising and market research industries as well as by Kantar Worldpanel.*
Class AB	*• Professionals; very senior managers in business; top-level civil servants. • Middle-management executives in large organisations, with appropriate qualifications. • Principal Officers in local government and the civil service. • Top management or owners of small businesses and educational and service establishments.*
Class C1	*• Junior management, owners of small establishments and all other non-manual workers. • Jobs in this group have very varied responsibilities and educational requirements.*
Class C2	*• Skilled manual workers. • Manual workers with responsibility for other people.*
Class D	*• Semi-skilled and unskilled manual workers, apprentices and trainees of skilled workers.*
Class E	*• Long-term recipients of state benefits. • Unemployed for more than six months (otherwise classify on previous occupation). • Off sick for six months or more (unless they are still being paid by their employer) • Casual workers and those without a regular income. • Intermittent workers in receipt of income support.*

Food Categories

- Out of Home
  - Hot Drinks
    - Coffee
    - Tea
    - Hot Chocolate
    - Other Hot Drinks
  - Cold Drinks
    - Regular
    - Diet

    Carbonates
    Juice & Juice Drinks
    Dairy Drinks
    Water
    Cold Coffee and Tea
    Other Cold Drink
  - Snacks
    - Sweet

      Cakes, Pastry & Biscuits
      Confectionery & Gum
      Fruit & Fruit Pots
      Ice Cream
      Yoghurt
      Other Sweet
    - Savoury

      Crisps, Snacks, Nuts & Popcorn, Dairy, Breadsticks, Crackers, Meat snacks Condiments, Sandwich Fillers & Instant Hot Snacks
  - Quick Meals

    Food to Go meal categories eg sandwiches, salads, sushi,, savoury pastry
    - Sandwiches
    - Salads
    - Savoury Pastry
    - Sushi
    - Other Quick Meals

      Baked Potato, Chips, Coup, Egg Meals, Hot Meal Bowls, Cereal and Porridge& other Savoury Pastry collected through free-typing in app
  - Main Meals

    Burger Meals
    Fish Meals
    Pizza Meals
    Chicken inc Fried Meals
    Roast Meals
    Breakfast Meals
    Chinese & Thai Meals
    Meat-Centred Meals
    Indian Meals
    Italian Meals
    Steak Meals
    Sausage & Hot Dog Meals
    Vegetarian Meals
    Other eg Mexican, Sides, other Meals collected through free-typing in app

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Discretionary Categories

- **Discretionary Categories**
  - **Regular Soft Drinks**
    - Carbonates
    - Juice & Juice Drinks
    - Dairy Drinks
    - Cold Coffee and Tea
    - Other Cold Drink
  - **Confectionery**
    - Confectionery ex Gum
  - **Cake, Pastry & Biscuits**
    - Cakes, Pastries & Biscuits (excluding Scones, Pancakes, Teacakes, Unfruited Buns)
  - **Crisps, Snacks & Popcorn**
  - **Ice Cream**
  - **Other Sweet**
    - eg Scone, Shortbread, Gingerbread (typically cakes that are collected through free-typing in app)
  - **Other Savoury**
    - eg cheese twists
  - **Puddings and Desserts**

Promotions, and Delivery Services/Takeaways

Promotions

Kantar Worldpanel collect promotions and vouchers used across all purchases, with panellists flagging a purchase when it includes a multibuy/meal deal, a voucher, or another promotion. This means the measure is defined on consumer perception of them having bought something in a promotion:

Meal Deal – eg sandwich, snack and drink for £3

Multibuy – eg 2 for £3

Voucher – eg 50% off food

Other promotion – eg £1 temporary price reduction

Delivery Services (inc Intermediaries)

Kantar Worldpanel have adapted and improved our takeaway collected methodology over the 3 years of the panel.

We now have 3 years of takeaway (collection and delivery data).

We can asks panellists to record how they ordered it (drive thru, phoned for, app) and how they received it (collected or delivered)

OOH usage panel

Needs (Multi-tick)
Health
Low in fat/salt/sugar
Light/not filling
To get a portion of fruit veg
Health benefits
Time for a healthier meal
More natural less processed
Provide a varied diet
Calorie or portion control
Enjoyment
Enjoy the taste
Fancied a change
A treat or reward
Asked for by partners/kids
Fancied something sweet or sav
Refreshing
Relaxation/wind down
Social
An alternative to alcohol
Practicality
Quick
Easy to come by
All that was available
Filling
Complements rest of the meal
Makes the meal complete
Can eat on the move
To tide me over until mealtime
For one person
Routine/ritual
Thirst quenching
Needed warming up
To keep hydrated
Energy/stimulation
Night cap/sleeping aid
Cooling down

Number of people present
1 Person Present
2 People Present
3 People Present
4 People Present
5 People Present
6 People Present
7 People Present

Main Meal Descriptors
Celebration
Social
A quick bite
Together time
Romantic
Treat
Relaxing
Fuel
Planned
Special
Grabbed
Economical
On the go

Where consumed
On Premise
Workplace
School
Café
Coffee shop
Sandwich shop
Licensed premises
Leisure outlet
Travel
Fast food restaurant
Other restaurant
Outside
At Home
Other

FOTG

Kantar Worldpanel's OOH usage app looks at where people consumed food. In order to look at FOTG we have created the universe by food which was not consumed on premise, and not taken home (to avoid overlap with delivery/takeaway purchases).

Where consumed
Workplace
School
Café
Coffee shop
Sandwich shop
Licensed premises
Leisure outlet
Travel
Fast food restaurant
Other restaurant
Outside
Other