



MCA.

UK EATING & DRINKING OUT INTELLIGENCE

EMPOWERING YOUR BUSINESS GROWTH

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec



Innovation
Branding
Solution
Marketing
Analysis
Ideas
Success
Management

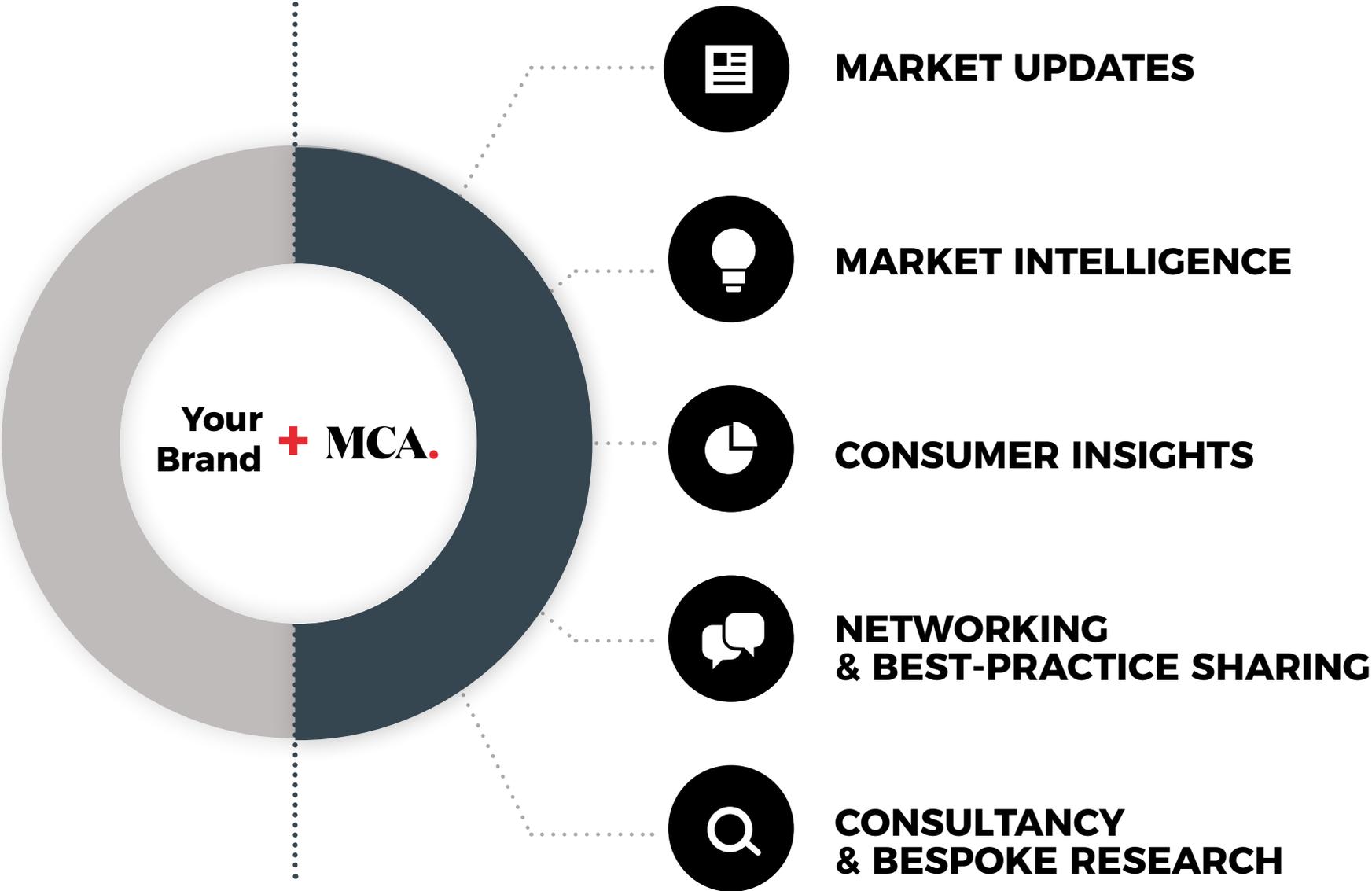
Innovation
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A PARTNERSHIP FOR GROWTH THROUGH KNOWLEDGE AND CONNECTIONS





MARKET UPDATES

**ORIGINAL
CONTENT, FREE
FROM ADVERTISING.
ENHANCED BY ANALYSIS
FROM A PASSIONATE
TEAM OF EDITORS
AND EXPERT
CONTRIBUTORS**

NEWS & INSIGHT

THE LATEST INDUSTRY DEVELOPMENTS
AND TRENDS ANALYSED

MCA'S NEWS & INSIGHT

subscription provides you with timely and verified information on the events taking place in the industry, from company and brand updates, to people moves and shifting consumer trends.



**AVAILABLE
AS AN
ANNUAL DIGITAL
SUBSCRIPTION
SERVICE**

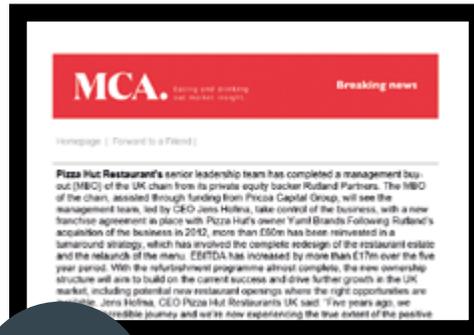
- **UNIQUELY CURATED:** “what you need to know” available at the start of your day
- **MAJOR ANNOUNCEMENTS** delivered via breaking-news email alerts
- **INSPIRATION AND INSIGHT** from interviews with leading industry players
- **STAY UP-TO-DATE WITH THE CURRENT MINDSET OF EATING OUT CONSUMERS** through monthly consumer insight
- **KEEP YOUR OFFERING ON TREND,** based on in-depth articles about emerging concepts



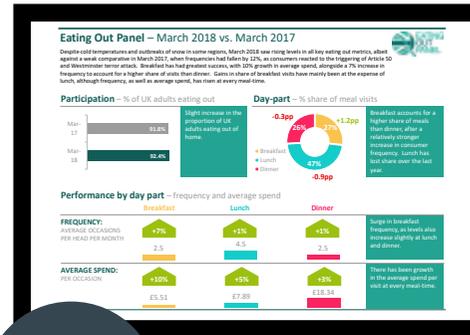
CRITICAL INFORMATION TO HELP DRIVE YOUR BUSINESS IN THE RIGHT DIRECTION



NEWS AND INSIGHTS, reporting on company and brand updates, people moves, shifting consumer trends, market disruptors and emerging innovative concepts



MAJOR ANNOUNCEMENTS delivered via breaking-news email alerts



MONTHLY DASHBOARDS analysing changes in eating and drinking out behaviour



MONTHLY JOURNAL including analysis, insight and interviews from key industry figures

Available in print & digital formats



MARKET UPDATES

FOOD STRATEGY FORUM

Access MCA's comprehensive market intelligence through the **FOOD STRATEGY FORUM's** annual programme of reports, debriefs, study tours, updates and client service support.

**AN
ALL-INCLUSIVE
PACKAGE OF
INSIGHT**



COMPLIMENTARY MARKET REPORTS:

- "Eating out in the UK"
- "Menu & Food Trends"
- "Top of Mind"



QUARTERLY FACE-TO-FACE MANAGEMENT BRIEFINGS:

presented by our experienced market analysts, who will explain the findings from MCA's most recent intelligence



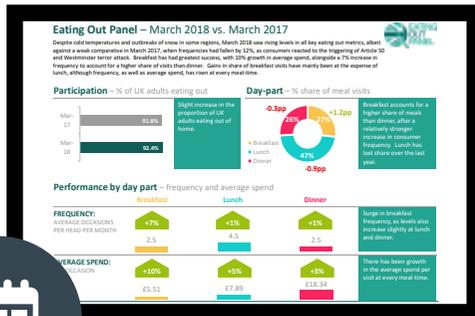
6 ANNUAL FOOD STUDY TOURS:

We are constantly seeking and checking out innovative concepts, so we are well placed to introduce you to the best trend-setting operators across the breadth of the food and beverage industry





MARKET UPDATES | FOOD STRATEGY FORUM (CONTINUED)



MONTHLY CONSUMER INSIGHT DASHBOARD: highlighting current shifts in consumer behaviour



CONCEPTS TO WATCH: quarterly updates on the new concepts, brand developments and ideas that you need to be aware of, and which MCA's analysts think are most relevant



Complimentary tickets to the **ANNUAL MCA MARKETING CONFERENCE**, dedicated to marketers in the eating and drinking out sector



FULL SUPPORT FROM A DEDICATED CLIENT SERVICES MANAGER, WHO LIVES AND BREATHES THE INDUSTRY, AND WORKS CLOSELY WITH MCA'S ANALYST TEAM

MARKET REPORTS

HIGHLY-RATED MARKET DATA

WITH INSIGHTS ON THE COMPETITIVE LANDSCAPE, SHIFTING CONSUMER BEHAVIOUR, TRENDS AND FORECASTS, MCA'S ANNUAL UK REPORT SERIES INCLUDES:



100+
PAGES OF
INSIGHT

- **EATING OUT IN THE UK:**
Comprehensive analysis of the current market landscape and consumer behaviour
 - **MENU & FOOD TRENDS:**
Menu composition, pricing, formats and cuisine trends, along with a forecast of their evolution
 - **“TOP OF MIND”:** Insights into key market developments and the current and future state of the sector, through the views of business leaders in the UK eating & drinking out industry
 - **RESTAURANT MARKET REPORT:**
Size and breadth of the restaurant industry, market developments, major issues, levers for growth and the future outlook
 - **FOOD-TO-GO MARKET REPORT:**
The present state of the food-to-go market, evolving consumer behaviour, growth drivers and the future outlook of the sector
 - **PUB MARKET REPORT:**
The size and breadth of the branded, tenanted and independent pub sector, complete with detailed consumer insight into usage behaviours
- BESPOKE REPORTS:**
In addition to our annual report series, our analysts also undertake bespoke research to shed light on specific subjects that matter to your business.

**VERIFIED
MARKET DATA
GATHERED
THROUGH MCA'S
UNPARALLELED
RESEARCH
NETWORK +
COMPREHENSIVE
ANALYSIS**

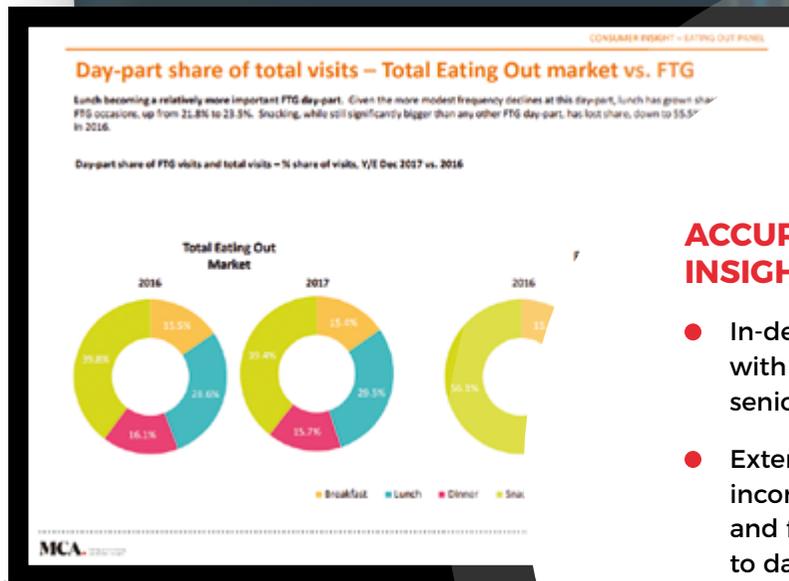
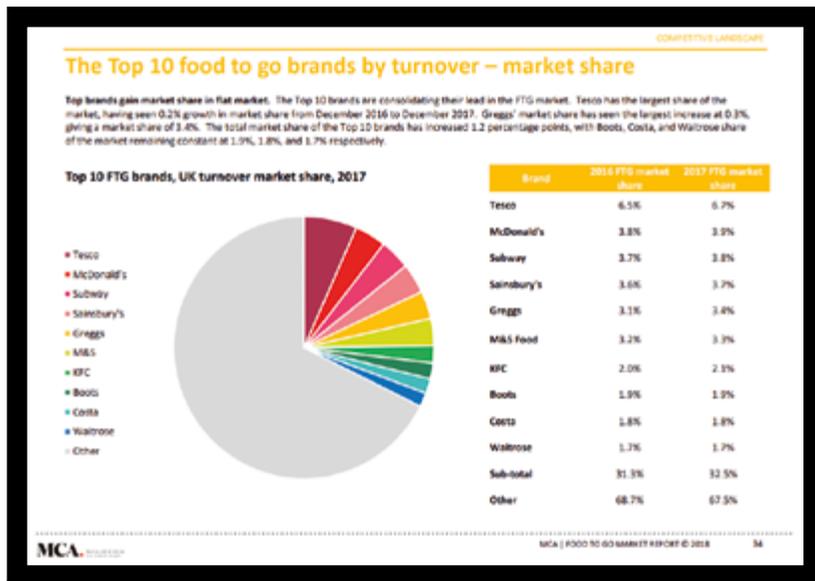
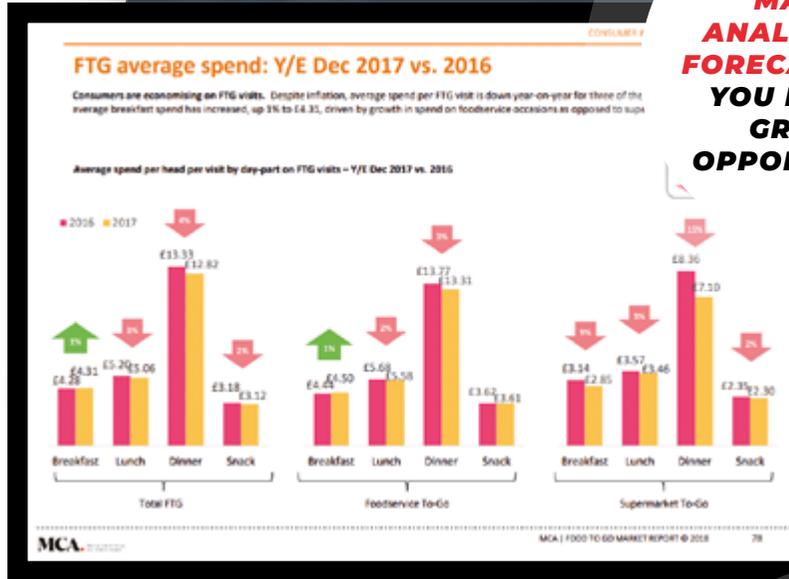


MARKET INTELLIGENCE | MARKET REPORTS (CONTINUED)

EXTRACTS FROM THE MCA UK FOOD-TO-GO MARKET REPORT 2018



DETAILED MARKET ANALYSIS AND FORECASTS HELP YOU IDENTIFY GROWTH OPPORTUNITIES



ACCURATE AND ACTIONABLE INSIGHT BASED ON:

- In-depth surveys and interviews with UK eating-out goers and senior industry executives
- Extensive desktop research, incorporating all previous reports and financial information available to date



MARKET INTELLIGENCE

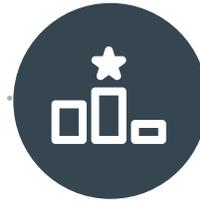
OPERATOR DATA INDEX

ONE-STOP RESOURCE TO MONITOR UK EATING & DRINKING OUT BRANDS

MCA's **OPERATOR DATA INDEX** provides comprehensive data on 700+ leading UK operators, including market rankings, sales and outlet numbers, monthly analysis, as well as detailed profiles of the Top 100, all in one place.



**COMPREHENSIVE
BRAND PROFILES**



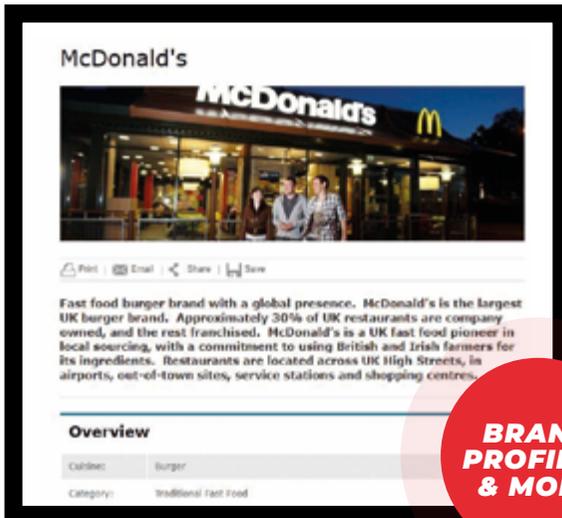
**BRAND
RANKINGS**



**TOPICAL
ANALYSIS**



**CONCEPTS
TO WATCH**



- Understand the operator landscape with detailed profiles of the UK's 100+ leading and emerging eating out brands
- Assess the leading players with ranking lists by outlet numbers and turnover, segmented by branded restaurants, casual dining, fast food restaurants, pub & bar brands and pub groups
- Examine trends, such as fast growing cuisines, promotional offers and social media
- Identify opportunities through analysis of outlet growth and eating & drinking out segments
- Get inspiration from MCA's chosen 'concepts to watch' of emerging and innovative brands





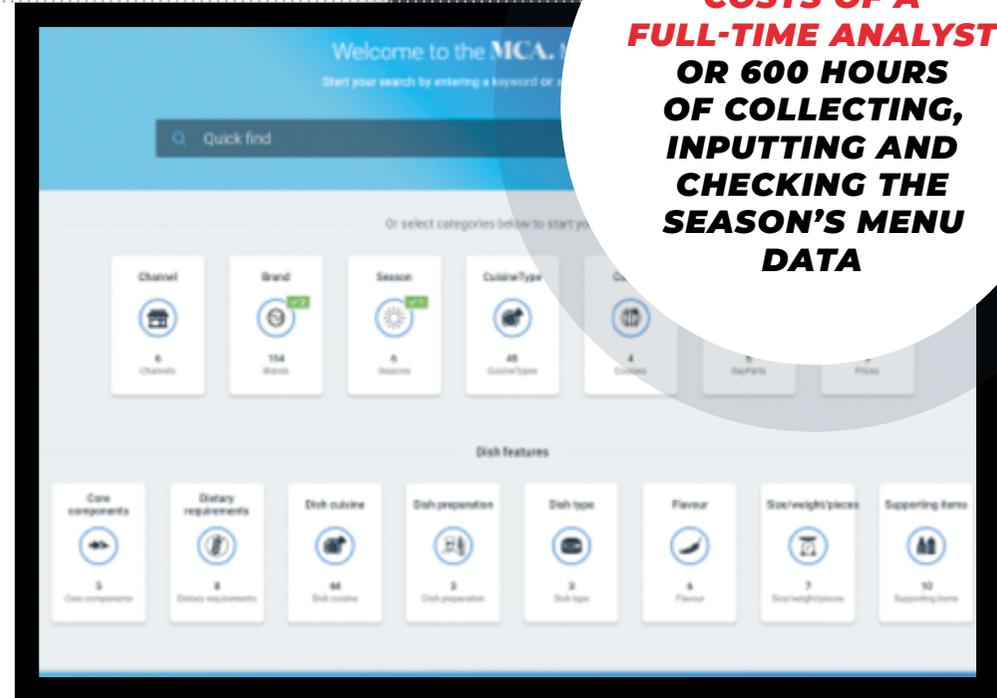
MARKET INTELLIGENCE

MENU TRACKER

KEEP YOUR FINGER ON THE PULSE OF MENU AND PRICING TRENDS

MCA'S MENU TRACKER provides detailed menu and pricing data on 150+ UK restaurant and pub brands, giving you a highly efficient and cost-effective replacement for collecting and analysing menus. All data entries are double-checked by our team of analysts, making MCA's Menu Tracker the most accurate source of UK menu data available.

- Check what is trending in food and beverages by accessing the full list and description of every menu items for each brand, course and day-part
- Get pricing details for each dish, including regional variations and price changes
- Access detailed dish information, including size/weight, dietary requirements, cooking methods, cuisine types and more
- Look at monthly analysis of menu compositions and pricing
- Get inspiration by checking NPD activity and how dishes change over the seasons



SAVE ON THE COSTS OF A FULL-TIME ANALYST OR 600 HOURS OF COLLECTING, INPUTTING AND CHECKING THE SEASON'S MENU DATA

Available as an annual digital subscription service

MOST INFLUENTIAL MENU TRENDS FOR 2018 AND BEYOND

1.
HEALTHIER EATING

3.
PROVENANCE

2.
VEGETARIAN

4.
FOOD-TO-GO



CONSUMER INSIGHT

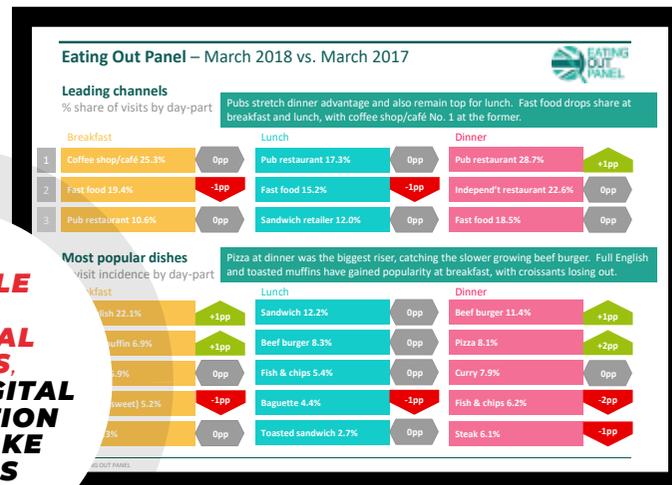


EATING OUT PANEL

UNDERSTAND AND ADAPT TO SHIFTING EATING AND DRINKING OUT BEHAVIOUR

MCA's UK **EATING OUT PANEL** tracks the behaviour of 6,000 nationally representative consumers each month, building up to a sample of 72,000 every year, across all eating out channels and day parts (including snacking). Our insight team validate and analyse all data to provide you with a clear picture of current consumer behaviour, drivers of change and key perceptions.

- **KEEP TRACK** of consumer behaviour with a monthly dashboard, highlighting performance by day-part in terms of consumer frequency, average spend, leading channels visited and most popular dishes consumed
- **UNDERSTAND** the evolution of consumer behaviour with 100+ pages of quarterly analysis on the key trends identified from MCA's UK Eating Out panel
- **DIVE DEEP** into channel-specific consumer trends, using dedicated analysis on:
 - Pub brands
 - Restaurant brands
 - Food-to-go
 - Bakery and sandwich products



AVAILABLE AS INDIVIDUAL REPORTS, ANNUAL DIGITAL SUBSCRIPTION OR BESPOKE ANALYSIS REPORTS



UNDERSTANDING MINDSET AND BEHAVIOUR

WHO:

Demographic analysis, across all eating out channels

WHERE:

Brand awareness and visit choices

WHY:

factors in selecting an eating out channel and brand over another



GATHERED DATA

WHAT:

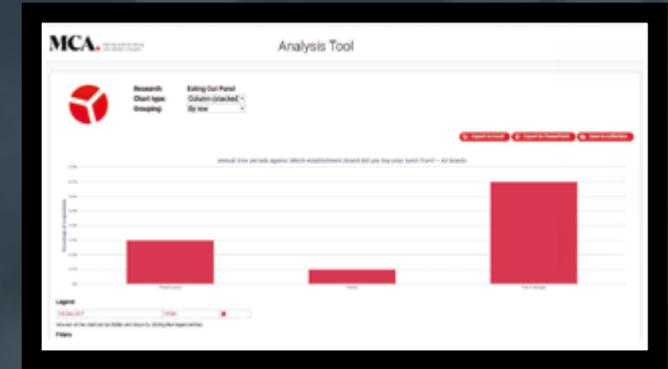
Consumption patterns and details of food & drink items

HOW MUCH:

Frequency and spending patterns across day parts and over time

HOW GOOD:

Satisfaction rankings based on analysis of KPIs, Net Promoter Scores, market shares and revisit rankings for individual brands



MCA'S ANALYSIS TOOL lets you examine specific consumer behaviour by running your own queries from MCA's UK Eating Out Panel data. Selecting the desired timeframe and/or channel/brand, dive deep into:

- Participation levels
- Visit share performance
- Spends by channel and day-part
- Category performance changes
- Brand and competitor performance
- Customer profiles and satisfaction

Results can be exported both as data tables and charts.



HOT TOPICS

TRACK CONSUMER OPINION ON TOPICAL ISSUES FACING THE EATING OUT MARKET

MCA's **HOT TOPICS** report is a bi-monthly tracker based on nationally-representative consumer surveys, which reports on consumer behaviour and perceptions in relation to:

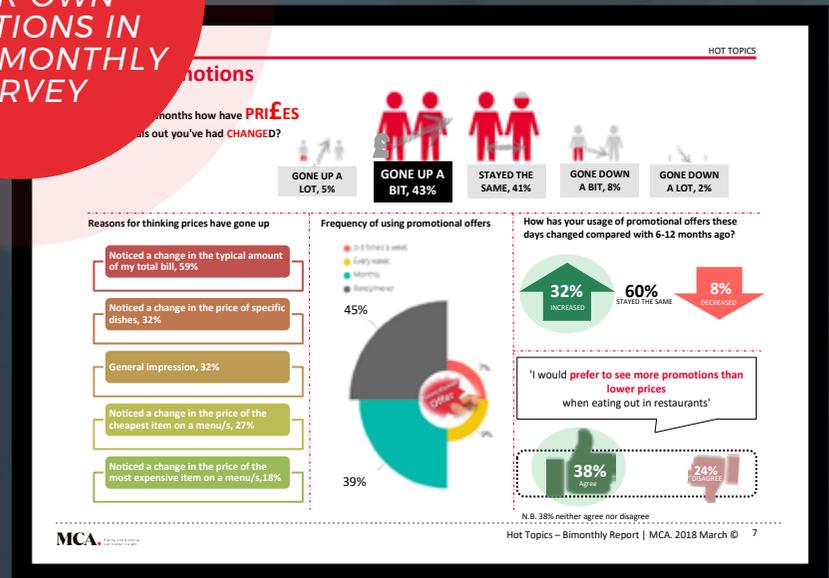
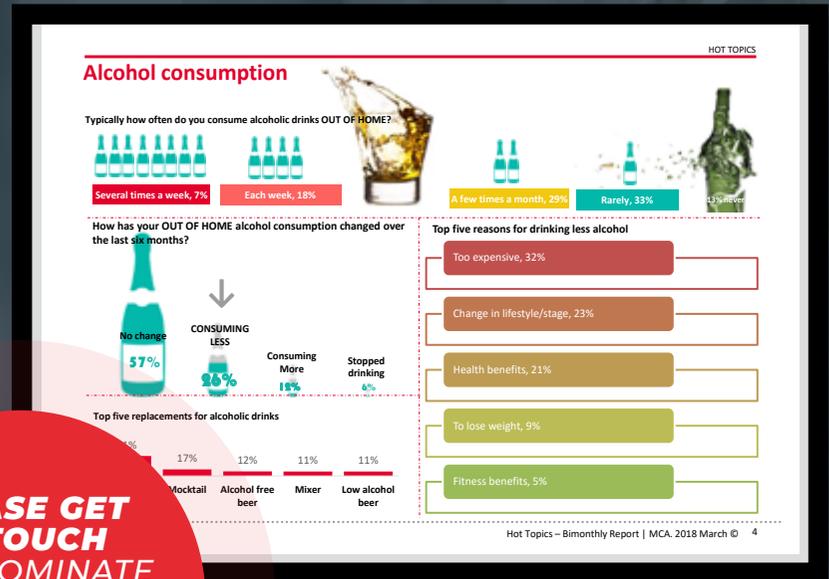


**BI-MONTHLY
REPORTS
AVAILABLE
AS PART OF
AN ANNUAL
SUBSCRIPTION**

- **THE SUGAR TAX LEVY:** highlighting the soft drink categories most often consumed when out of home, awareness levels of the Sugar Tax Levy and price change perceptions
- **FOODSERVICE DELIVERY:** surveying how often and the main reasons why consumers order home delivery, the most important factors in brand selection, preferred takeaway cuisines and the impact on eating out frequency
- **PACKAGING/SUSTAINABILITY:** uncovering the importance consumers give to sustainability, their desired areas of improvement and behaviour changes to reduce environmental impact when eating out, how sustainability impacts operator visits and consumers' attitude towards price incentives to encourage the reduction of disposable packaging
- **VEGAN/VEGETARIANISM:** revealing the importance of meat-free dish choices when selecting an eating out venue, the reasons for seeking this change in diet and preferred meat-free cuisines
- **PRICE AND PROMOTIONS:** detailing consumers' perception of the level and reasons for price changes in foodservice in the last six months, how often they take advantage of promotional offers when eating out, how promotional usage has evolved over the last 6-12 months and consumer preferences in relation to promotions vs lower prices
- **ALCOHOL DRINKING HABITS:** summarising how often people consume alcoholic drinks out of home, how and why their drinking habits have changed over the last six months, and which drinks they would consider as an alternative to their typical alcoholic drink choice



EXAMPLE ANALYSIS FROM HOT TOPICS



DO YOU HAVE A BURNING ISSUE WHICH IS NOT LISTED?

PLEASE GET IN TOUCH AND NOMINATE YOUR OWN QUESTIONS IN THE BI-MONTHLY SURVEY



NETWORKING &
BEST-PRACTICE SHARING



CONFERENCES AND EVENTS

INSIGHT SHARING AND RELATIONSHIP BUILDING WITH THE MOST ON-TREND OPERATORS, SUPPLIERS AND SOLUTION PROVIDERS

CONFERENCES

Each focusing on a specific segment of the eating and drinking out market, MCA's annual conference series delivers relevant market intelligence and thought-leadership on the burning topics of the moment. With a blend of presentations, panel sessions and networking time, these full-day events provide an ideal platform to discuss market disruptors, best-in-class concepts, headwinds and opportunities.

- **THE RESTAURANT CONFERENCE**
therestaurantconference.co.uk
- **THE FOOD-TO-GO CONFERENCE**
foodtogoconference.co.uk
- **THE PUB CONFERENCE**
thepubconference.co.uk
- **THE TENANTED PUB COMPANY SUMMIT**
tenantedpubcompanysummit.co.uk
- **THE MARKETING CONFERENCE**
marketinginfoodservice.com
Dedicated to marketers in the eating out industry
- **HOSTECH**
hostech.co.uk - Digital innovation in hospitality



RETAILERS' RETAILER AWARDS

Celebrating the very best concepts and individuals in the UK eating and drinking out sector, the annual Retailers' Retailer Awards bring the senior tier of the industry into one room to reward and recognise true excellence in the market. The awards are a great platform for forward-looking brands. Votes come exclusively from senior executives within the sector.

rroty.co.uk



EXECUTIVE EVENTS, OFFERING EXCLUSIVE SUPPLIER ACCESS FOR SPONSORS



Open to the leaders of the foodservice sector, the **DIRECTORS CLUB** series of private dinners provides a unique setting to discuss topical issues, with a major business, political or financial speaker stimulating debate.



Designed for the most senior finance-responsible executives in the UK eating and drinking out industry, **MCA'S FD LEADERS CLUB** is a series of invitation-only events providing a productive environment to network and hear from industry professionals representing other industries, government, senior commentators and the media.

FOOD STUDY TOURS



MCA's interactive food study tours present a unique opportunity to take inspiration and insight back to your business. With the MCA team frequently visiting new innovative concepts, we are never short of on-trend new operators to take you to, so you can experience their unique offering first hand.

SPONSORSHIP OPPORTUNITIES **PUT YOUR BRAND AT THE FOREFRONT OF YOUR PROSPECTS' MINDS**

Gathering senior decision-makers in the industry around common interests, MCA's events are a powerful opportunity to network face-to-face with senior decision makers and benefit from association with the leading events in the sector.



**CONSULTANCY &
BESPOKE RESEARCH**





CONSULTANCY & BESPOKE RESEARCH

CUSTOM ANALYSIS

SUPPORTING YOUR STRATEGIC DEVELOPMENT

Our bespoke research and consultancy services have already helped companies as diverse as:

“Which new markets are most suited for our brand expansion?”

“How do we differentiate and evolve our brand?”

“How can we better respond to challenges and opportunities over the next 3 to 5 years?”

By drawing on the broad market expertise of MCA’s analysts, you can get a fresh viewpoint on which to underpin your strategic development. After a preliminary consultation, we will undertake **BESPOKE DATA COLLECTION, RESEARCH AND ANALYSIS** to support your business strategy.

Our analysts’ findings are supported by their long-standing experience in studying shifts in the UK eating and drinking out market and watching innovation from abroad.

They will rigorously investigate your unique burning issues and deliver back reliable actionable insights to help your business succeed in the face of shifting consumer behaviour, disruptive trends and competitive threats.



**PARTNERING
WITH MCA.**



**THE EATING AND DRINKING OUT
INDUSTRY IS OUR PASSION AND FOCUS.**

By partnering with MCA, you get access to the expertise of our knowledgeable market analysts, editors and consultants, as well as unique opportunities to meet our extensive network of operators, suppliers and solution providers.

MCA is the leading UK provider of eating and drinking out market intelligence, renowned for unrivalled daily news coverage, market insight and events. Swapping speculation for fact, we keep all players in the market up to speed with the rapid evolution of the industry, reveal emergent opportunities and provide actionable intelligence to help you grow your business.



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