

Levercliff UK Consumer Tracking Research: Food To Go Focus

Edition 15 – October 2024



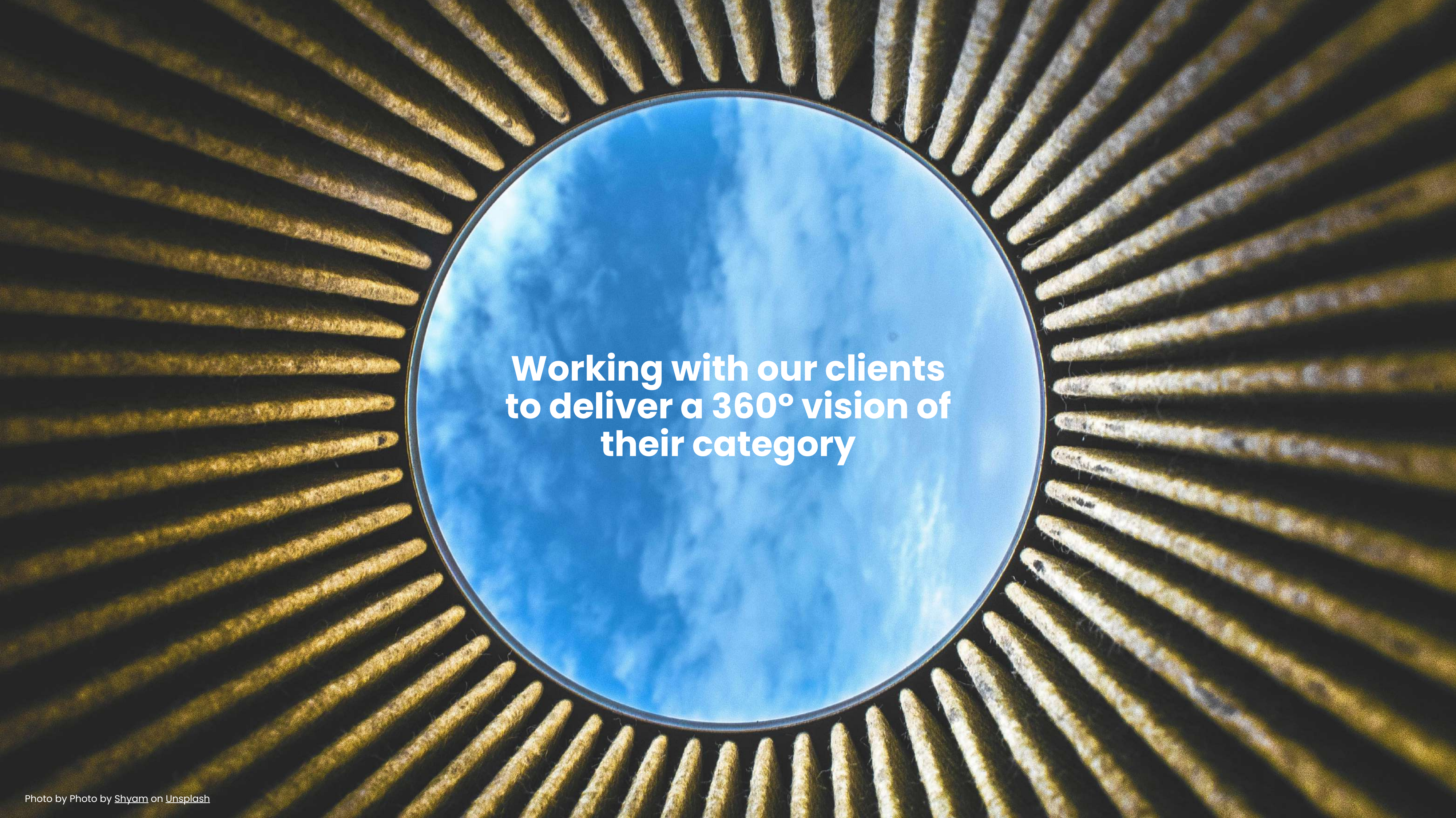
Levercliff





Welcome – we are Levercliff

Category consultants to
the food and drink industry

A circular mirror is centered in the frame, reflecting a clear blue sky with wispy white clouds. The mirror is surrounded by a dense ring of golden, pointed spikes that radiate outwards, creating a sunburst effect. The spikes are made of a textured material, possibly metal or wood, and are arranged in a circular pattern around the mirror.

**Working with our clients
to deliver a 360° vision of
their category**

Online quantitative research

10-minute quantitative research

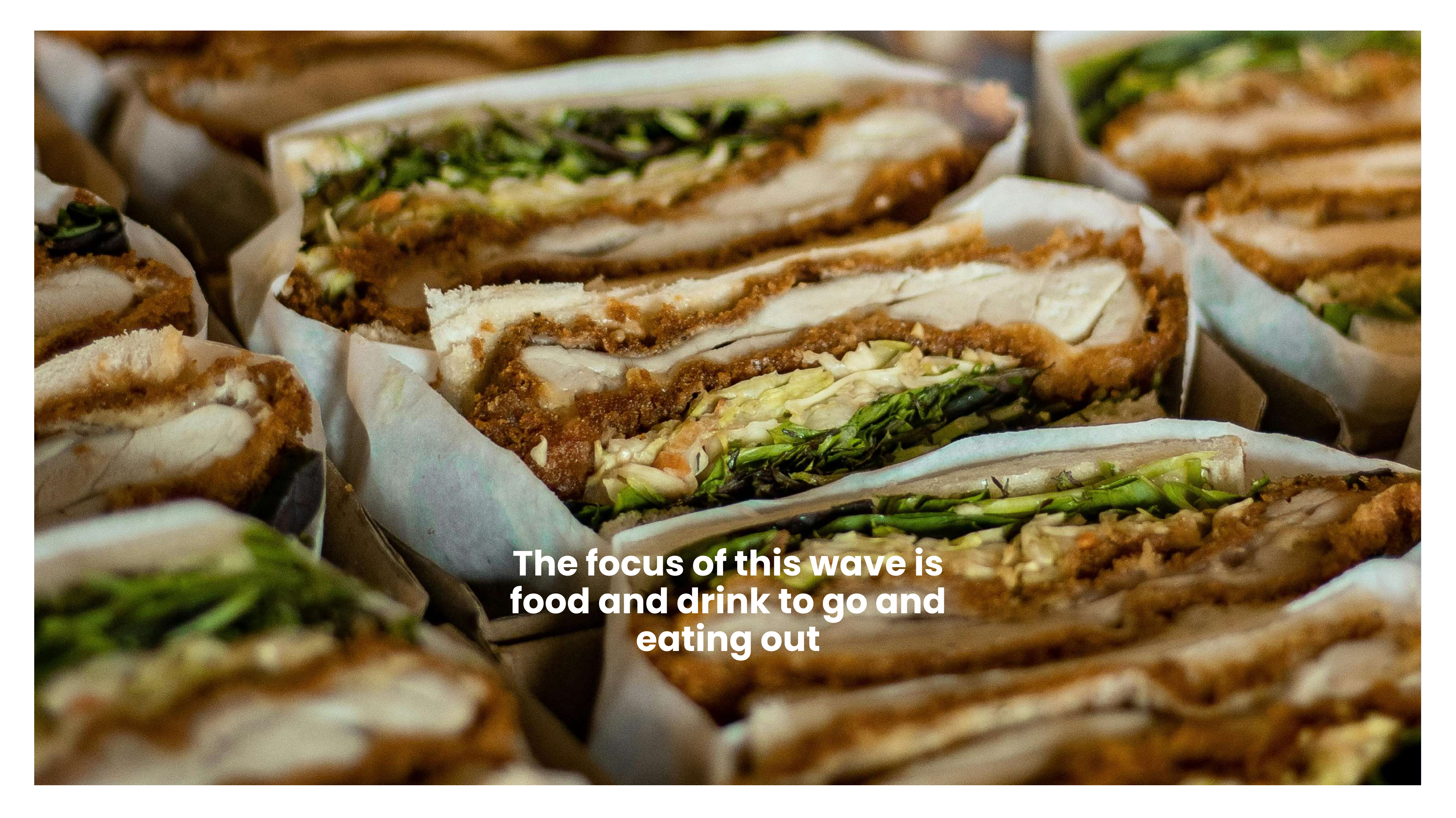
Sample size of 834

UK Representative, weighted

Conducted in October 2024

Scottish and Welsh boosts available



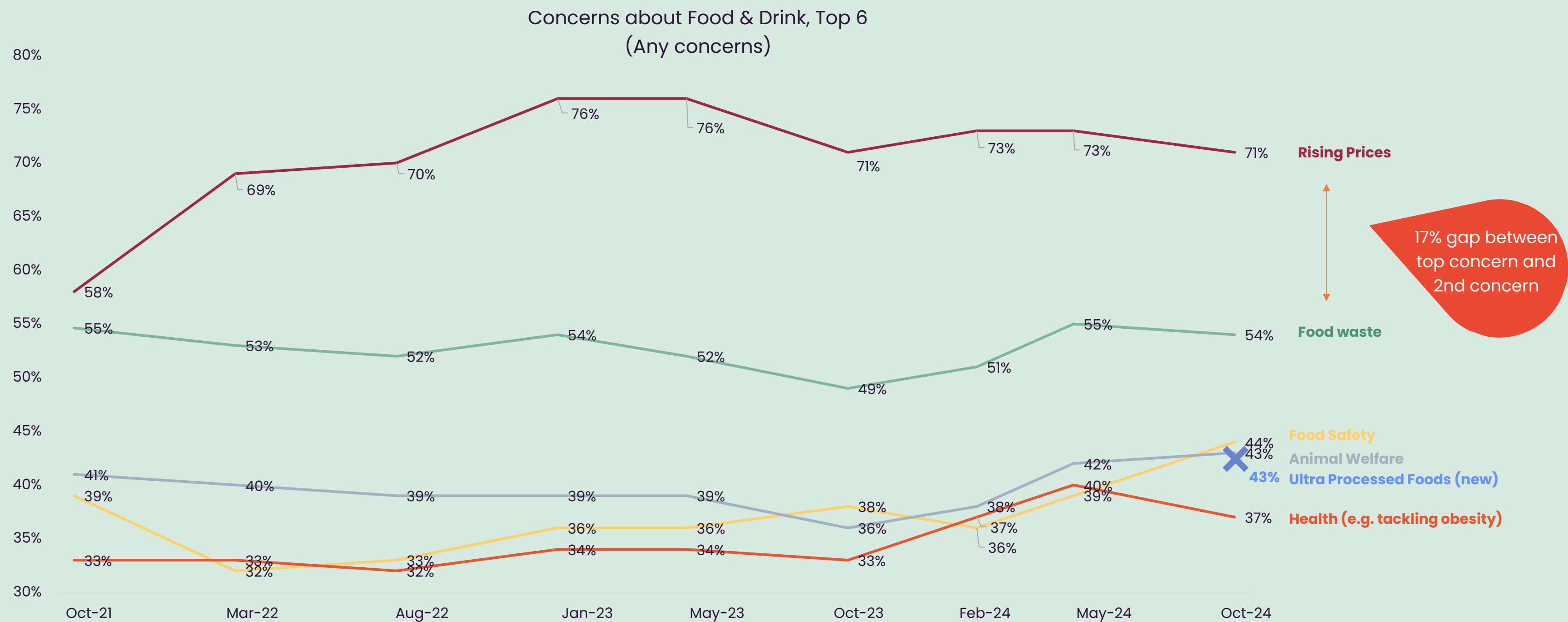


**The focus of this wave is
food and drink to go and
eating out**



The Context

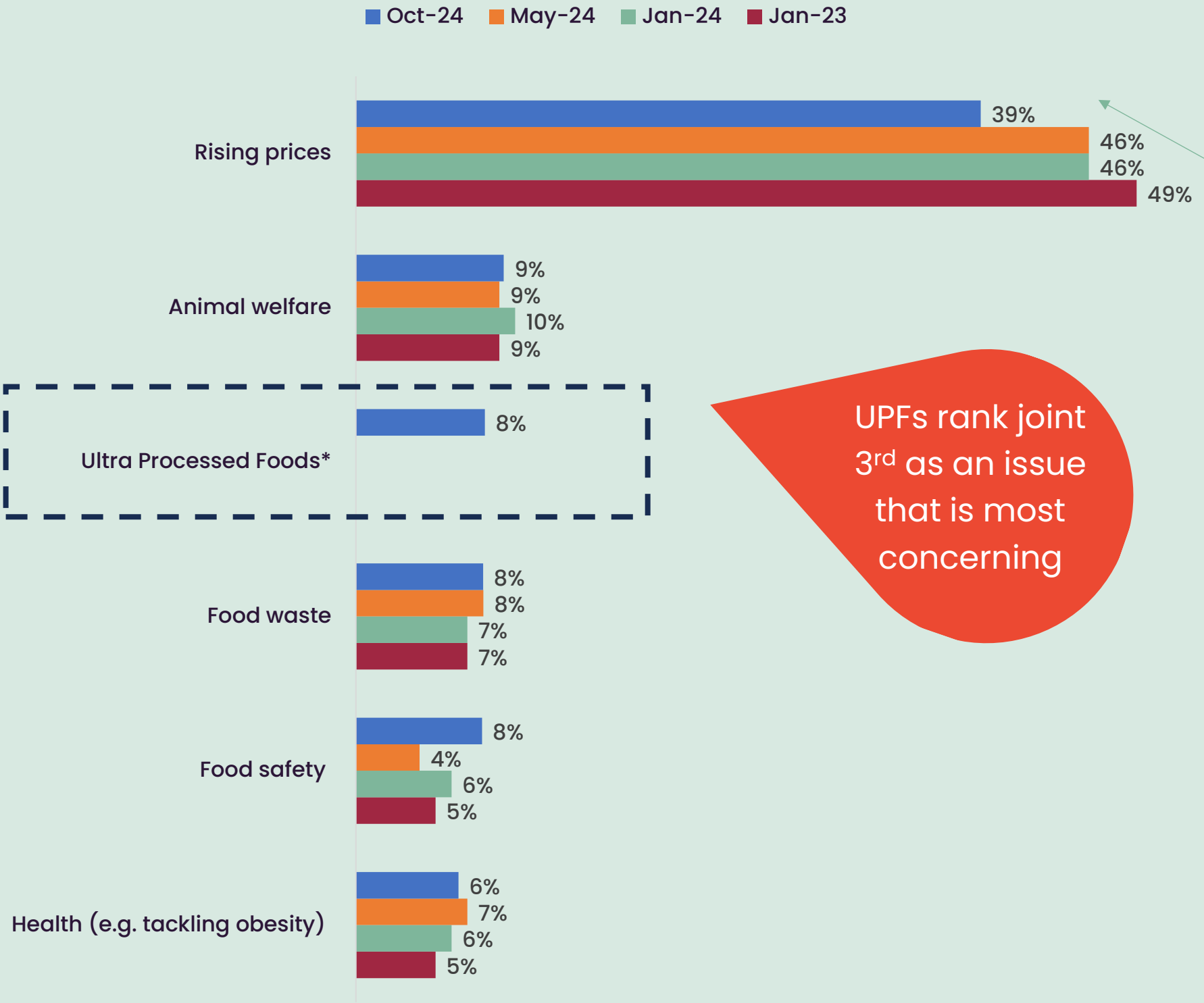
Rising prices remains the top concern for consumers.



Base; 834 Q Thinking about food & drink, which of the following issues actively concern you? Please select all that apply. (Levercliff Tracker Ed. 15 - Oct 2024)

Top Concerns Over Time

Rising prices, as the top concern, has decreased over time.



UPFs rank joint 3rd as an issue that is most concerning



Base; 806 Q And which of these issues regarding food & drink concerns you most? (Levercliff Tracker Ed. 15 – Oct 2024) *UPF added in T15

60% of consumers said the cost-of-living crisis impacted their purchasing of food and drink on the go

Gender:

Male 55%

Female 66%

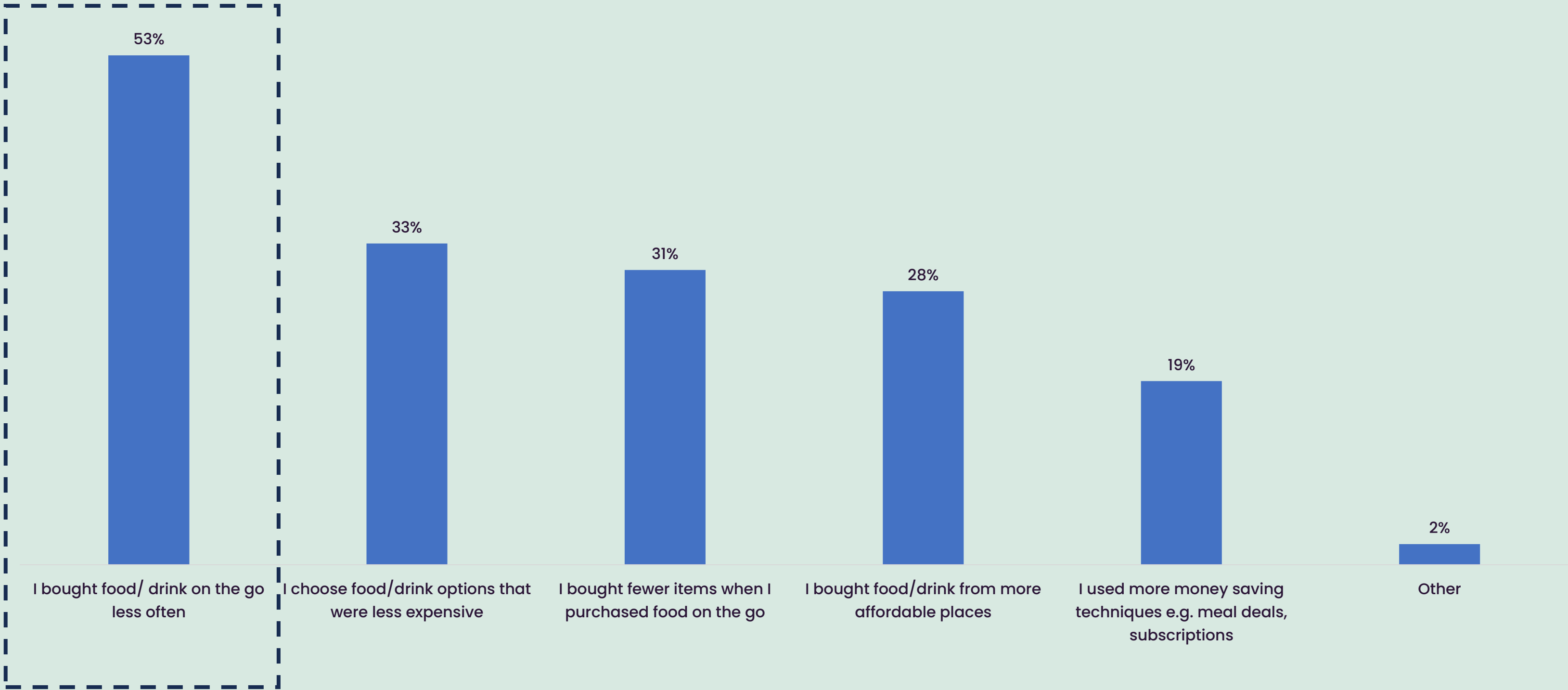
Working status:

Full time 66%

Part time 64%

Base; 834 Q Did the cost-of-living crisis have an impact on your purchase of food and drink on the go (e.g. how much you bought, frequency, where you bought it from)? (Levercliff Tracker Ed. 15 - Oct 2024)
Photo by Robert Ruggiero on Unsplash

Most decided to buy food/drink on the go less often.

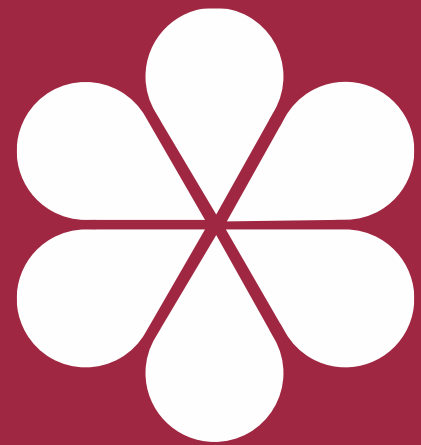


Base; 504 Q What changes did you make regarding buying food or drink ‘on the go’ as a result of the cost of living crisis? (Levercliff Tracker Ed. 15 – Oct 2024)

46% said they have continued with their food/drink on the go adaptations.



Base; 504 Q Now that the cost of food and drink is stabilising, have you changed back to how you used to shop for food or drink on the go or kept some of your changes? (Levercliff Tracker Ed. 15 – Oct 2024)



On the go – Overview



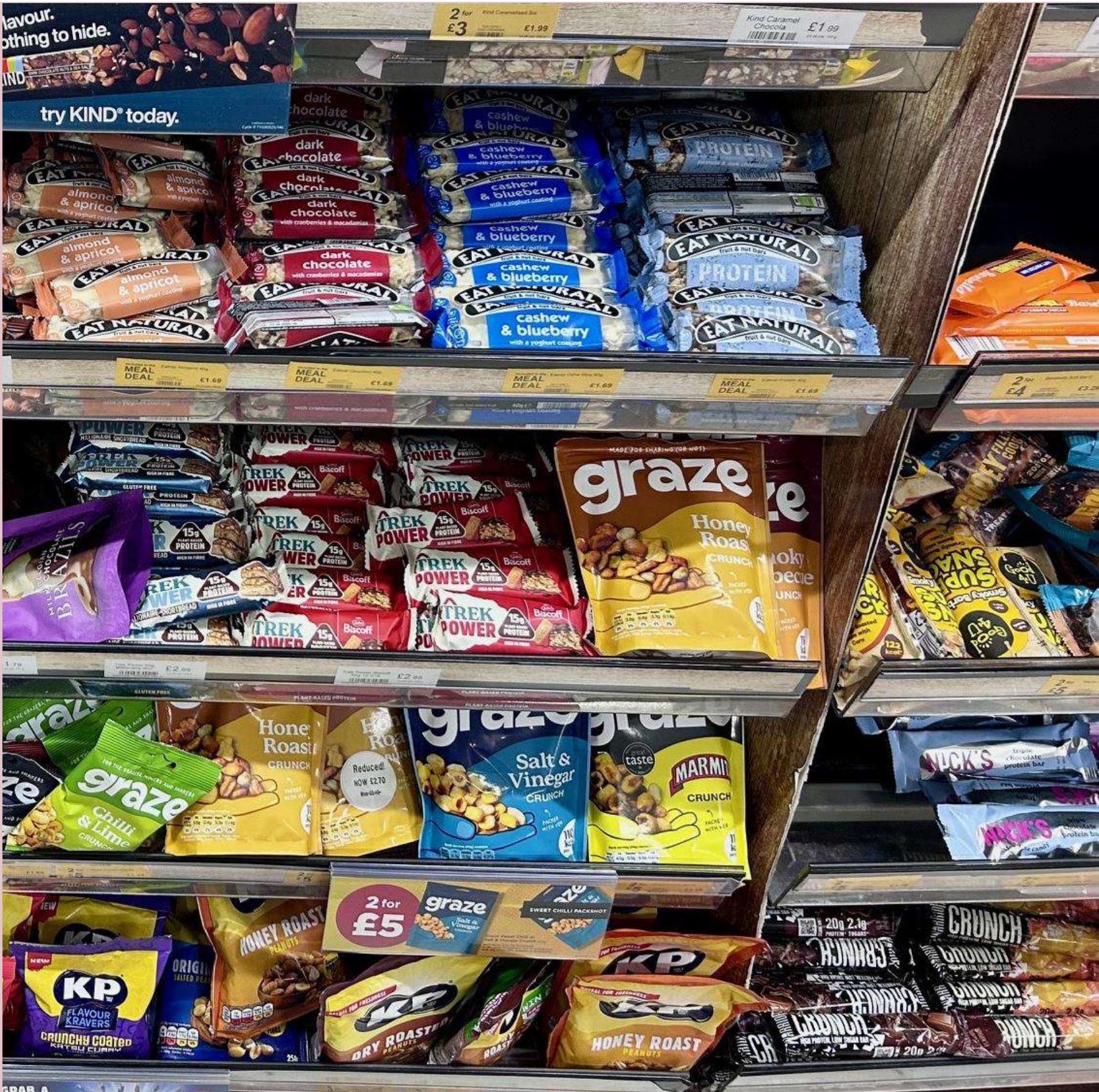
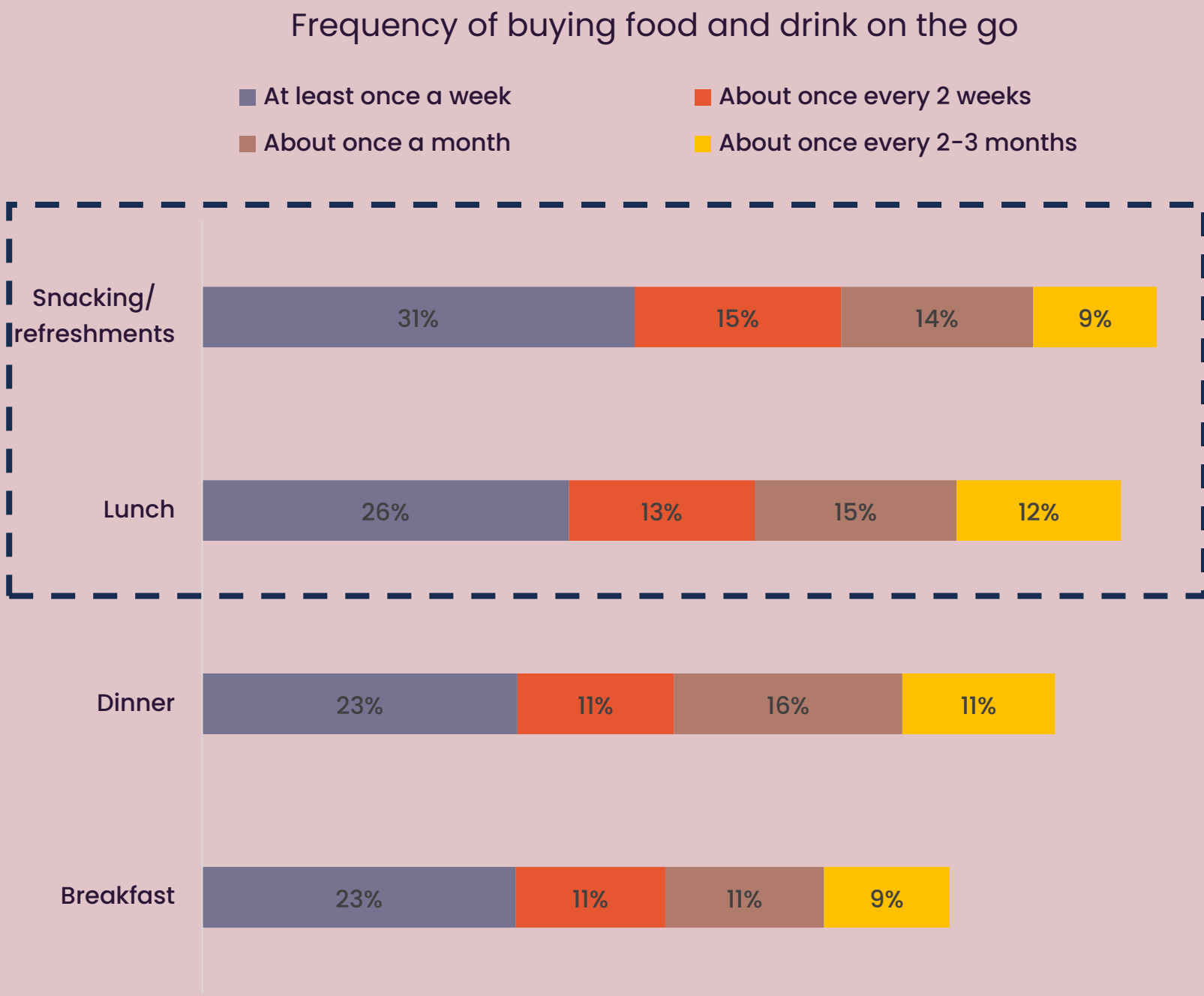
**43% of UK adults are buying food or drink
on the go at least once a week
That's 22.4m adults**

Base; 834 Q Thinking about the last 12 months, how often, if ever, have you purchased food or drink on the go for the following occasions? (Levercliff Tracker Ed. 15 – Oct 2024)
Photo by Karen Cantú Q on Unsplash

Purchasing Frequency of Food and Drink On The Go, By Occasion



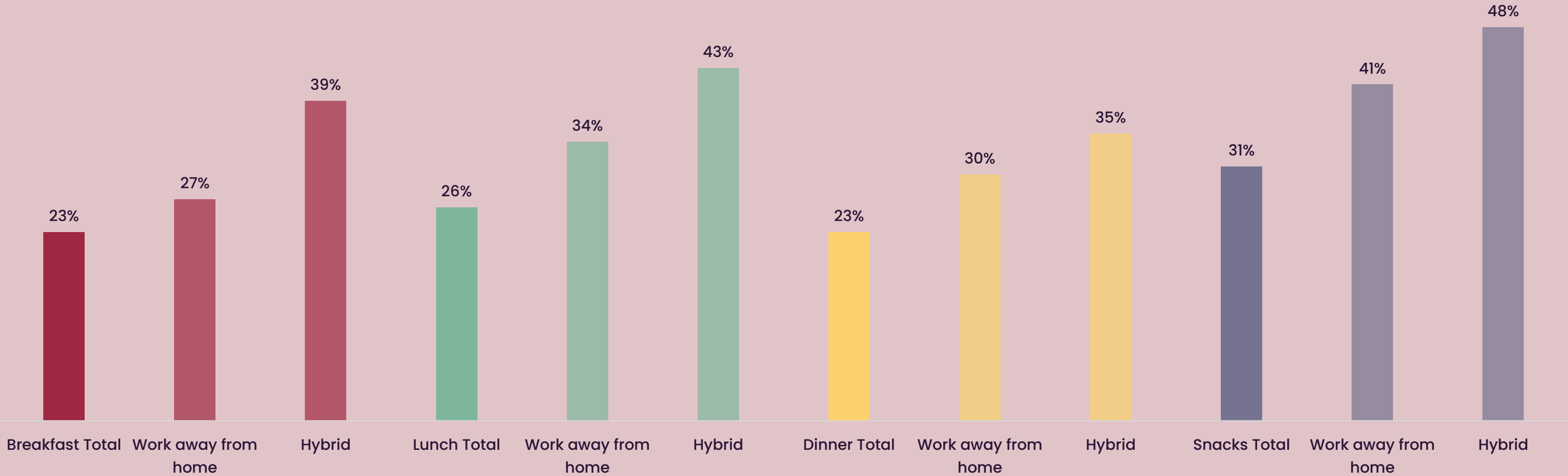
Snacking and lunch are the most common on the go occasions.



Base; 834 Q Thinking about the last 12 months, how often, if ever, have you purchased food or drink on the go for the following occasions? (Levercliff Tracker Ed. 15 - Oct 2024)

Hybrid workers are buying food/ drink on the go most frequently.

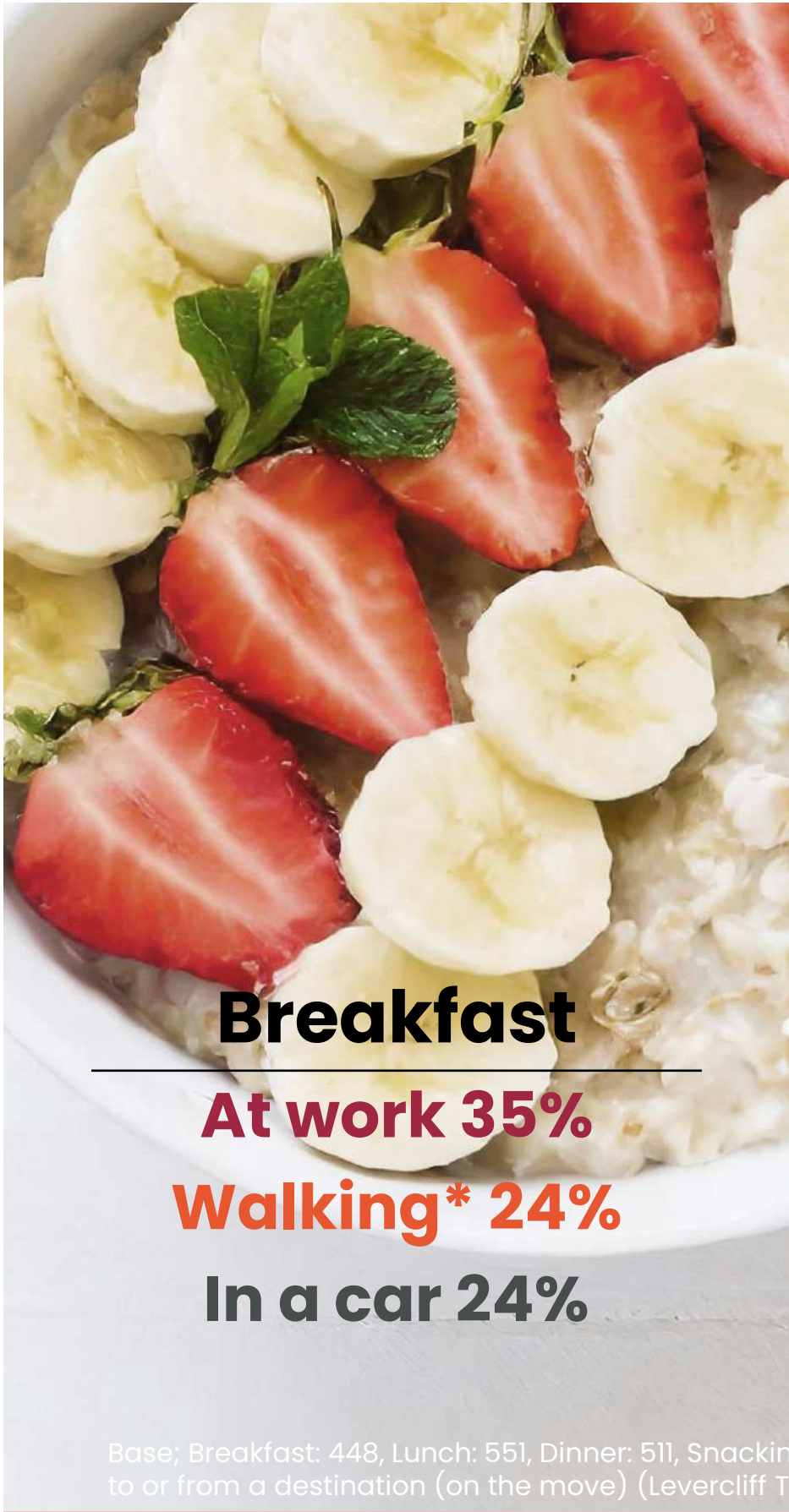
Buying food/ drink on the go 'at least once a week' by working location



Base; 834 Q Thinking about the last 12 months, how often, if ever, have you purchased food or drink on the go for the following occasions? Work away from home; 252, Hybrid: 216 (Levercliff Tracker Ed. 15 - Oct 2024)

Top Locations to Consume Food and Drink On The Go, By Occasion

Work is the most likely location for consumption.



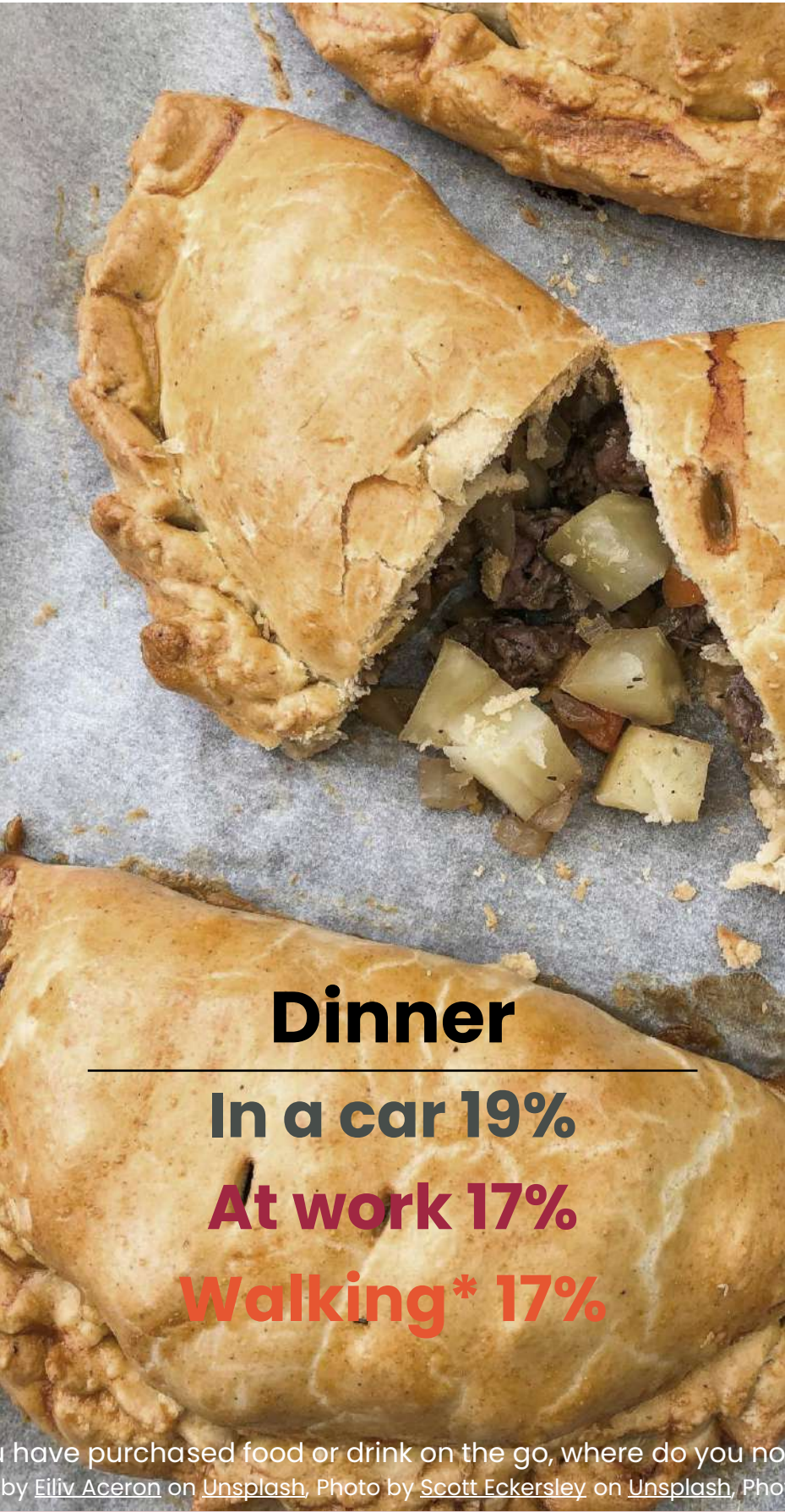
Breakfast

At work 35%
Walking* 24%
In a car 24%



Lunch

At work 42%
At the park 24%
In a car 22%



Dinner

In a car 19%
At work 17%
Walking* 17%



Snacks

At work 32%
In a car 32%
Walking* 29%

Base; Breakfast: 448, Lunch: 551, Dinner: 511, Snacking/ Refreshment: 572 Q Thinking about the occasions when you have purchased food or drink on the go, where do you normally consume these? *Walking to or from a destination (on the move) (Levercliff Tracker Ed. 15 - Oct 2024) Photo by Jacek Dudzinski on Unsplash, Photo by Eiliv Acheron on Unsplash, Photo by Scott Eckersley on Unsplash, Photo by Babs Gorniak on Unsplash



On the go – Breakfast and Lunch Occasions

Questions in this section were asked to consumers who buy breakfast or lunch on the go at least once every 2–3 months

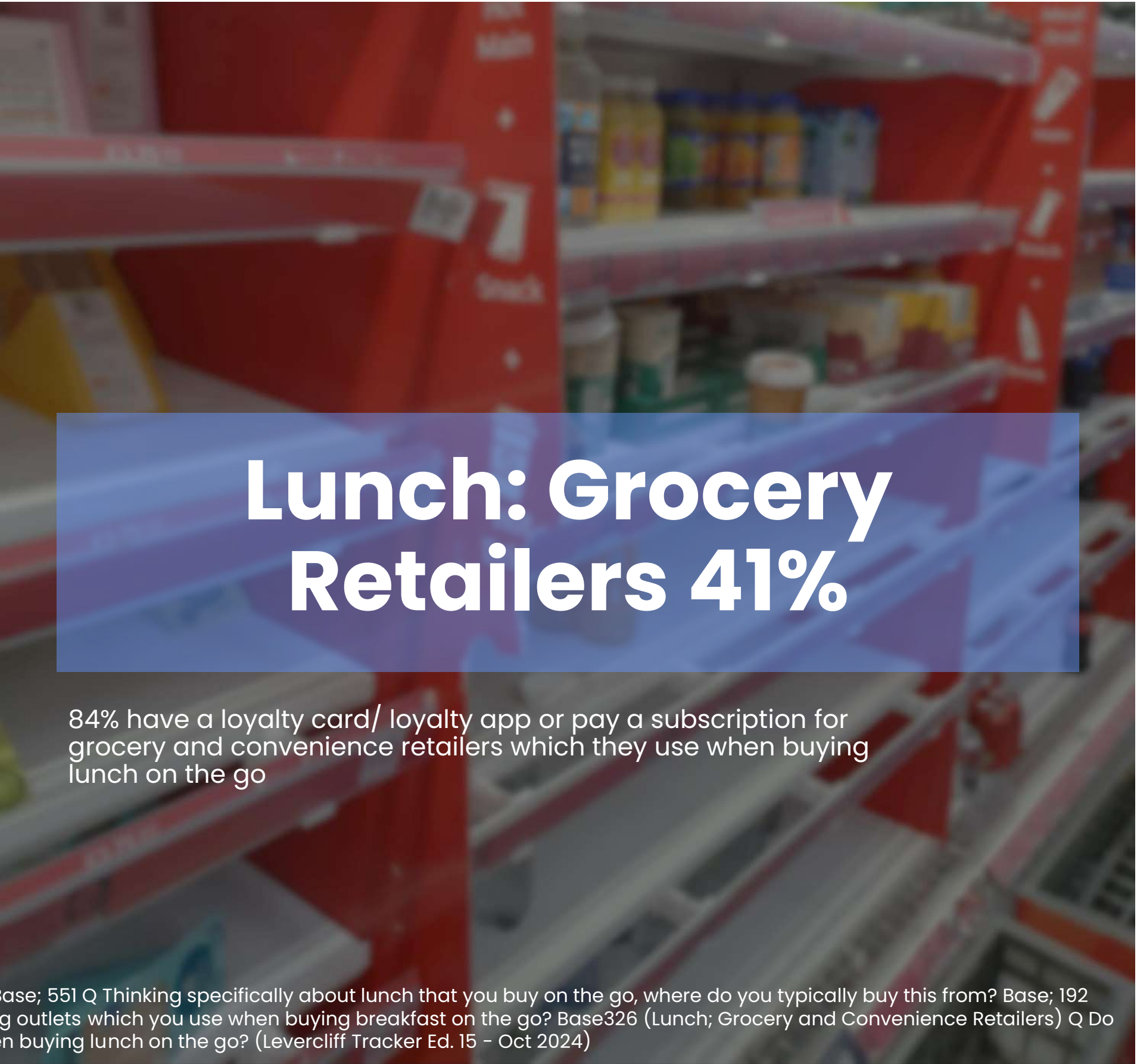
Fast food outlets are a popular destination for breakfast on the go.



Breakfast: Fast Food Outlets 43%

66% have a loyalty card/ loyalty app or pay a subscription for fast food outlets which they use when buying breakfast on the go

Base; 448 Q Thinking specifically about breakfast that you buy on the go, where do you typically buy this from? Base; 551 Q Thinking specifically about lunch that you buy on the go, where do you typically buy this from? Base; 192 (Breakfast; FF Outlets) Q Do you have a loyalty card, loyalty app or pay for a subscription with any of the following outlets which you use when buying breakfast on the go? Base326 (Lunch; Grocery and Convenience Retailers) Q Do you have a loyalty card, loyalty app or pay for a subscription with any of the following outlets which you use when buying lunch on the go? (Levercliff Tracker Ed. 15 - Oct 2024)



Lunch: Grocery Retailers 41%

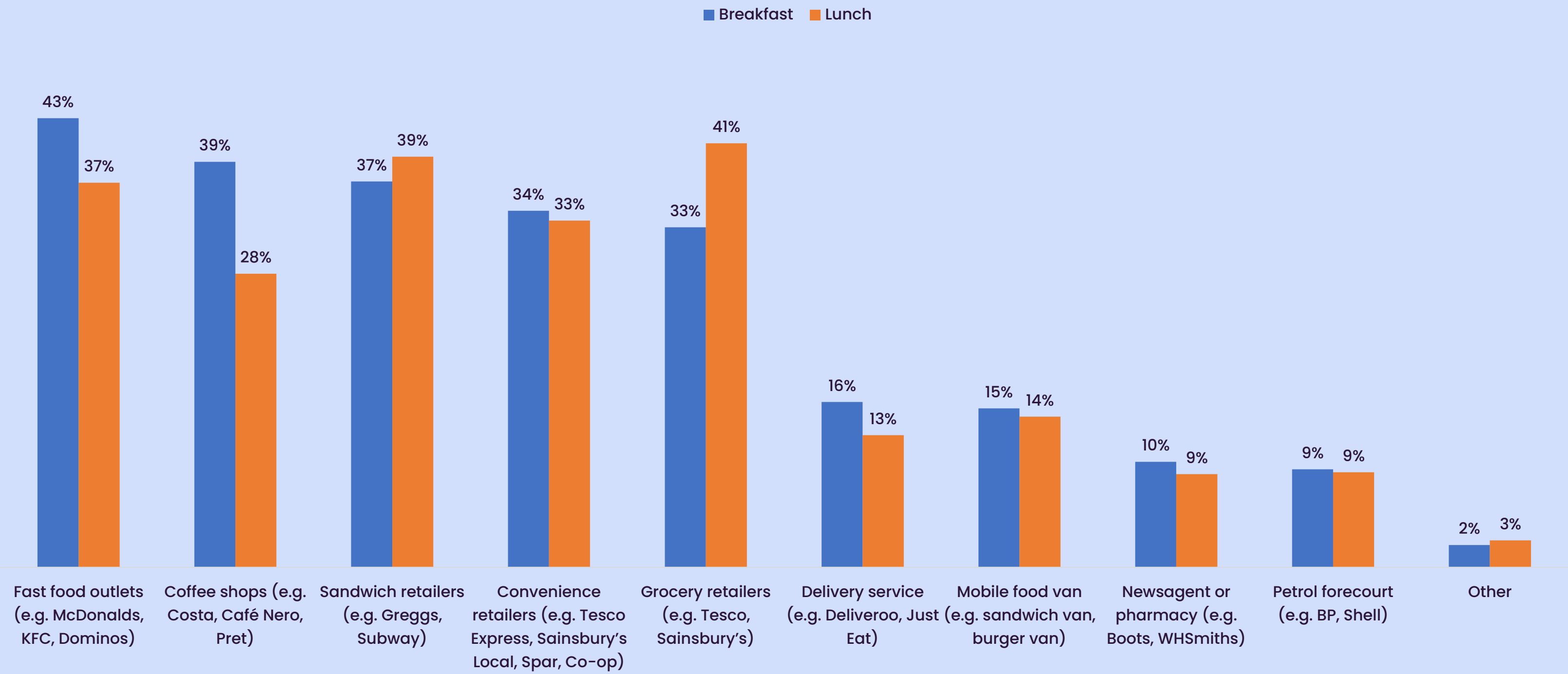
84% have a loyalty card/ loyalty app or pay a subscription for grocery and convenience retailers which they use when buying lunch on the go

Base; 448 Q Thinking specifically about breakfast that you buy on the go, where do you typically buy this from? Base; 551 Q Thinking specifically about lunch that you buy on the go, where do you typically buy this from? Base; 192 (Breakfast; FF Outlets) Q Do you have a loyalty card, loyalty app or pay for a subscription with any of the following outlets which you use when buying breakfast on the go? Base326 (Lunch; Grocery and Convenience Retailers) Q Do you have a loyalty card, loyalty app or pay for a subscription with any of the following outlets which you use when buying lunch on the go? (Levercliff Tracker Ed. 15 - Oct 2024)

Places Breakfast and Lunch are Purchased On The Go



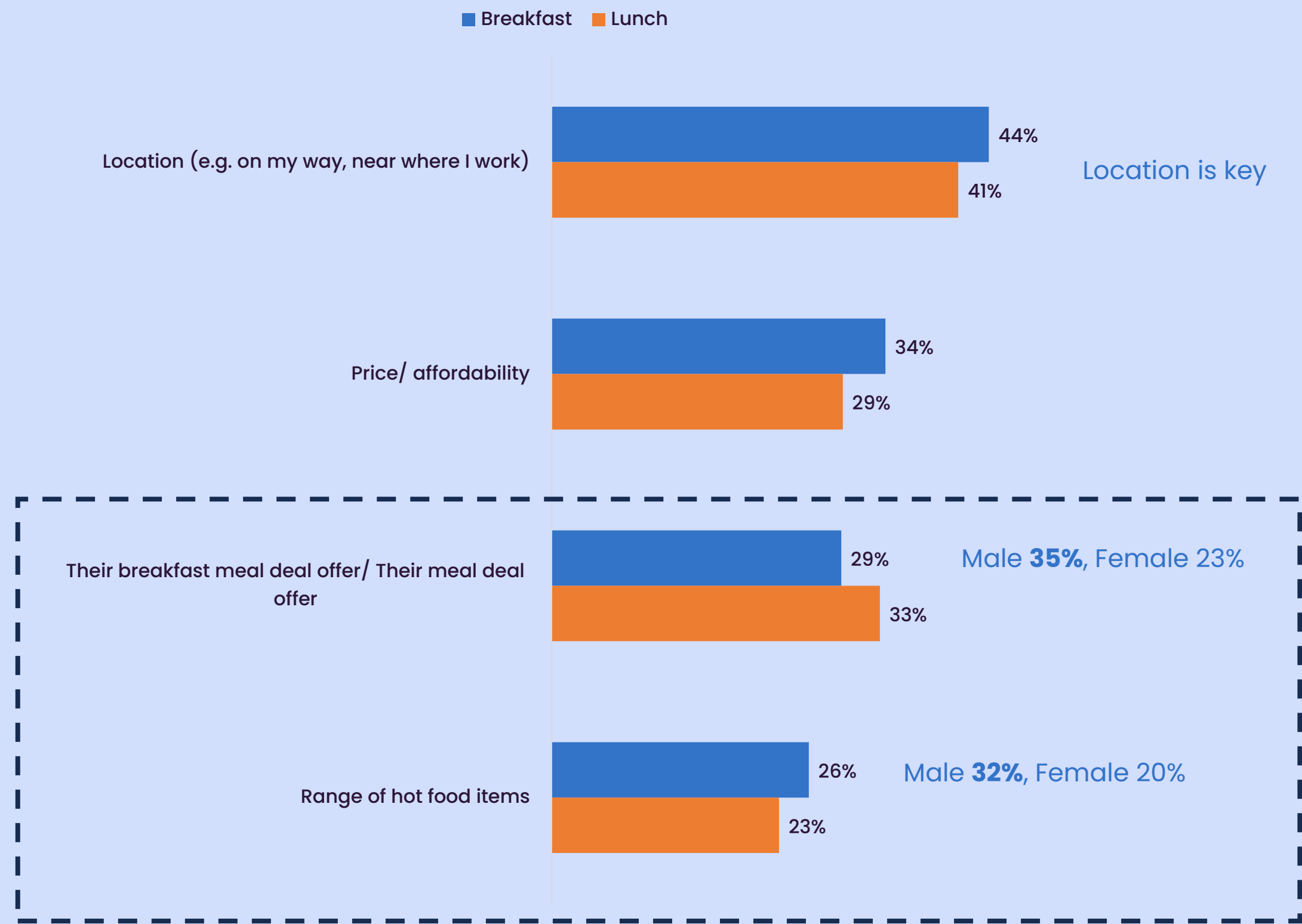
Occasion type can influence the place food/ drink on the go is purchased.



Base; 448 Q Thinking specifically about breakfast that you buy on the go, where do you typically buy this from? Base; 551 Q Thinking specifically about lunch that you buy on the go, where do you typically buy this from? (Levercliff Tracker Ed. 15 - Oct 2024)

Top Deciding Factors Behind Place of Purchase for Breakfast and Lunch

Location is key in determining the venue for buying food on the go.



Base; 448 Q How do you decide where to buy breakfast on the go? Base; 551 Q How do you decide where to purchase lunch on the go? (Levercliff Tracker Ed. 15 - Oct 2024)

Top Considerations When Choosing Breakfast On The Go



Consumers want something filling, low cost and not messy in the week.

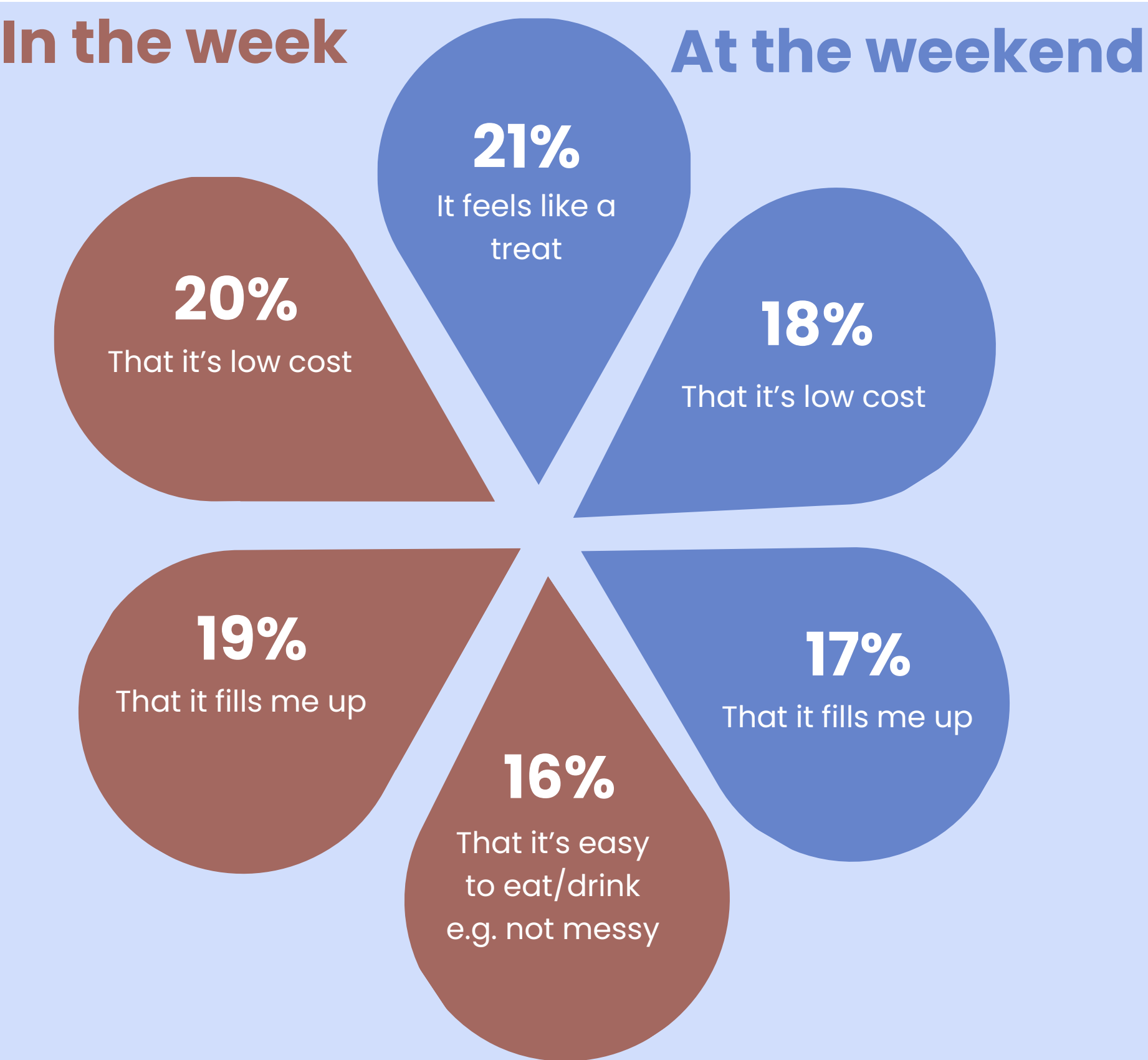
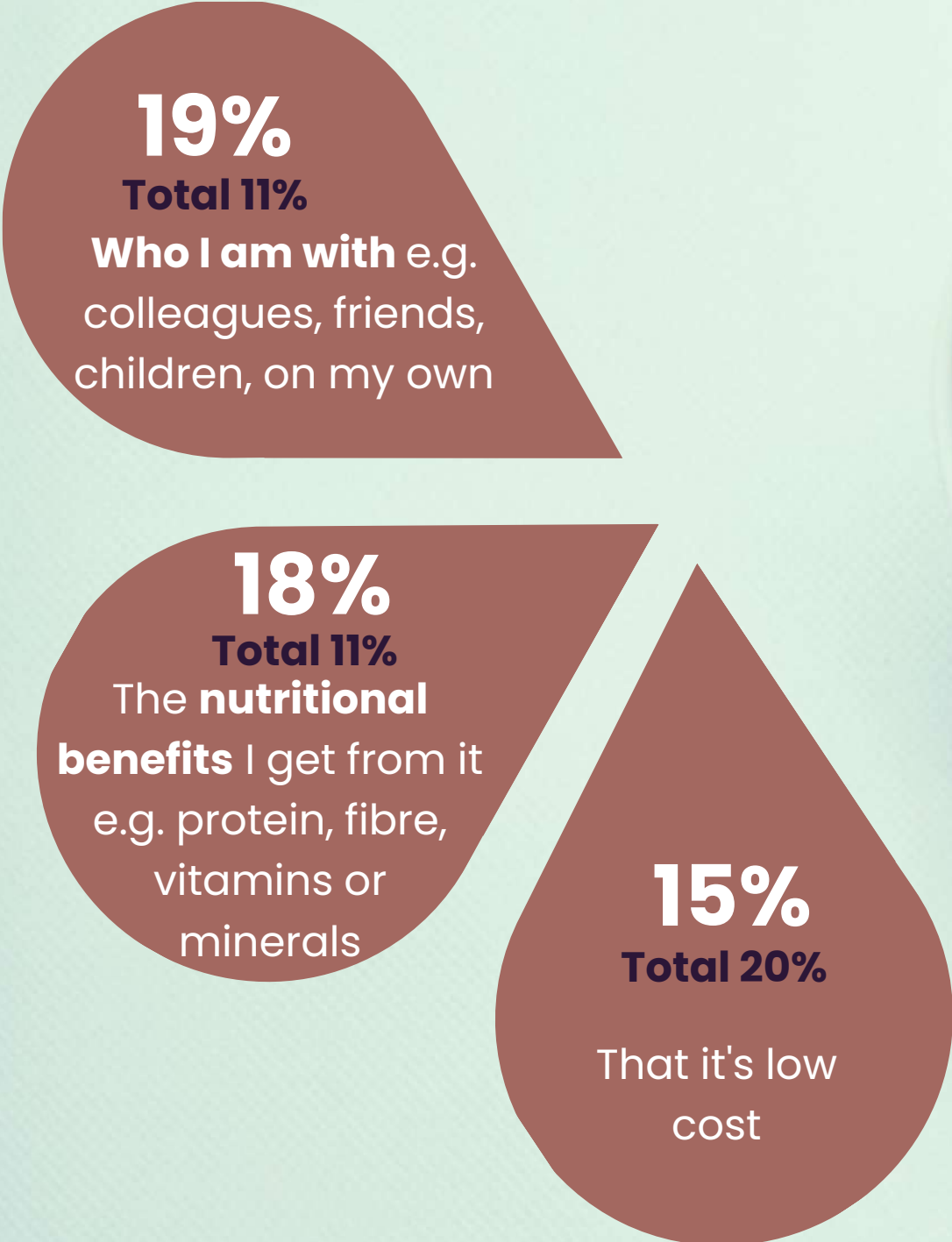


Photo by Russell Ferrer on Unsplash

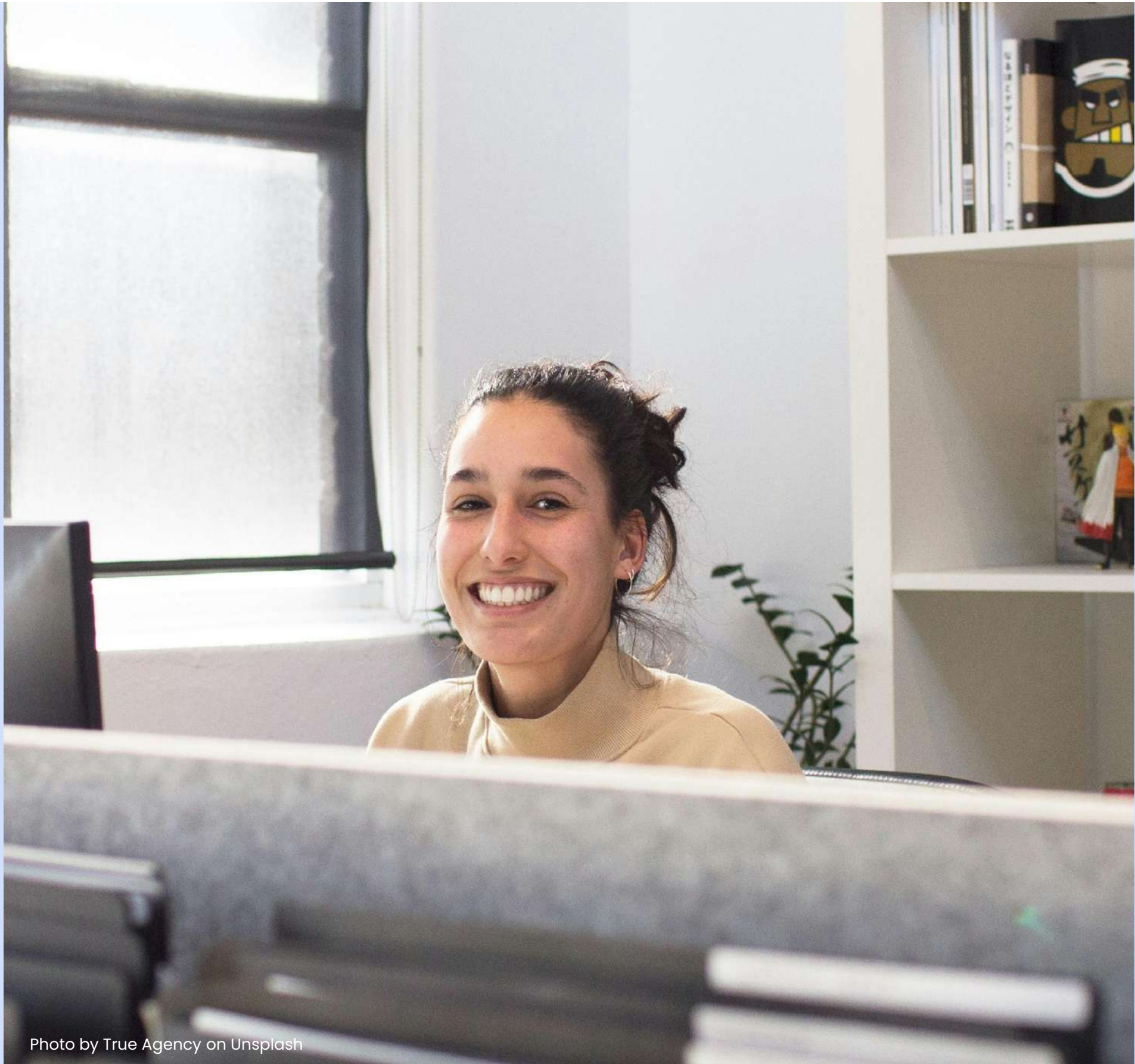
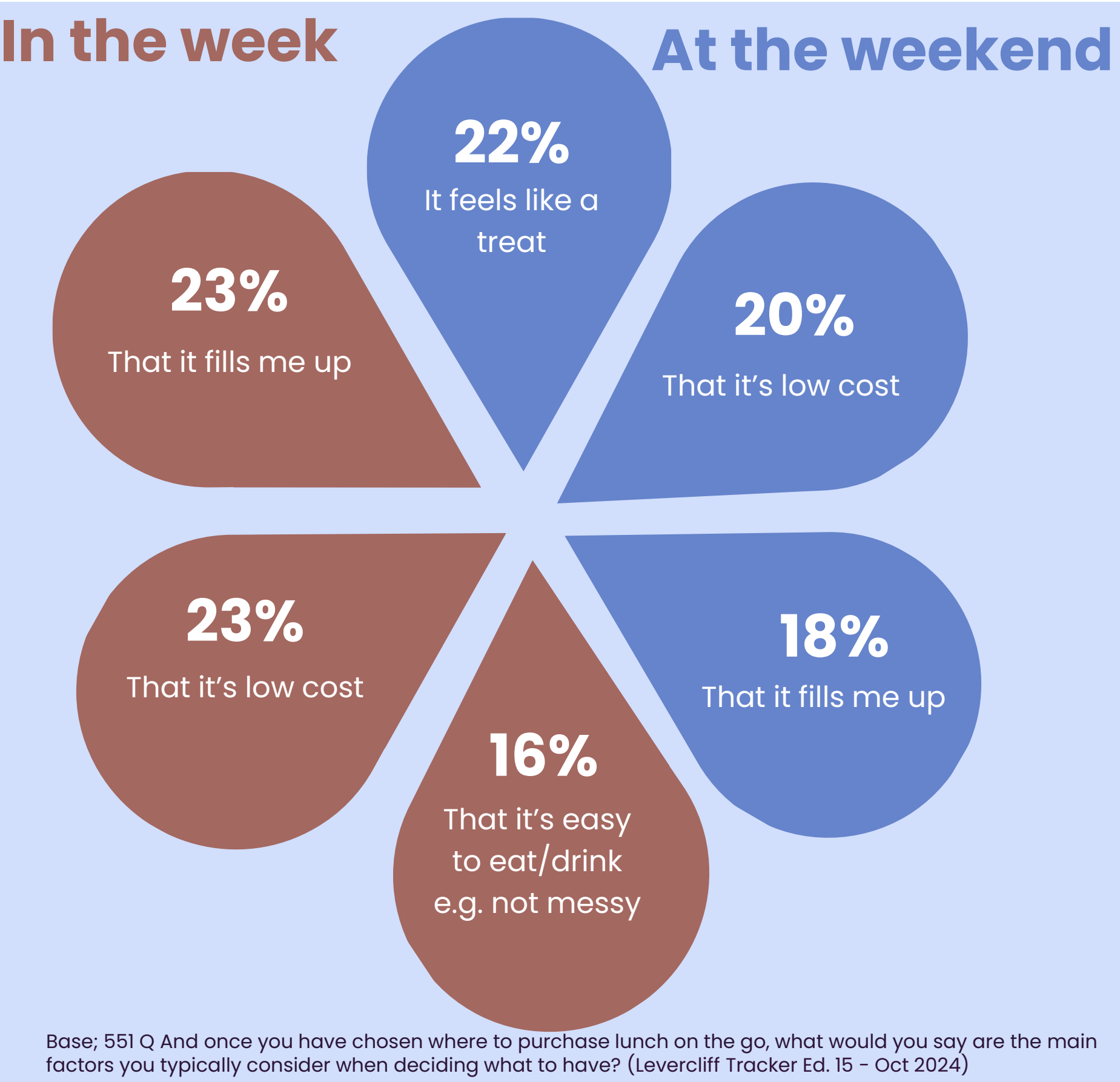
Base; 448 Q And once you have chosen where to purchase breakfast on the go, what would you say are the main factors you typically consider when deciding what to have? (Levercliff Tracker Ed. 15 - Oct 2024)

Who they are with, and nutrition are significantly more important for 18–34s.

Breakfast in the week,
18–34 year olds

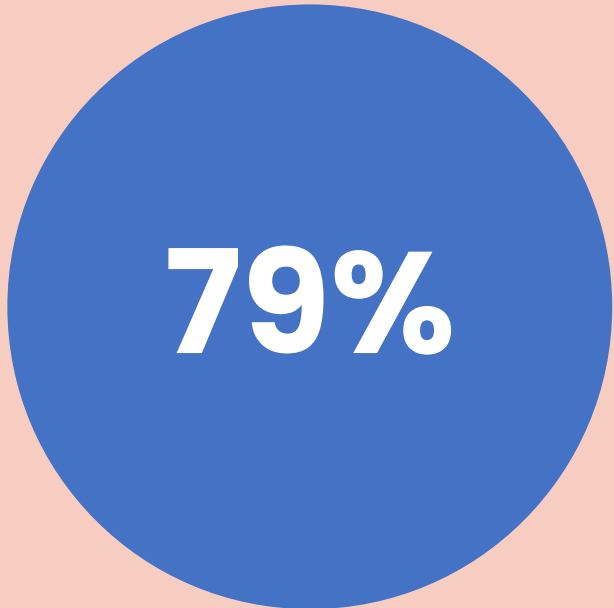


Lunchtime considerations are the same: filling, low cost and not messy.



The majority of people buy both food and drink when on the go.

Purchase both food and a drink



At Breakfast



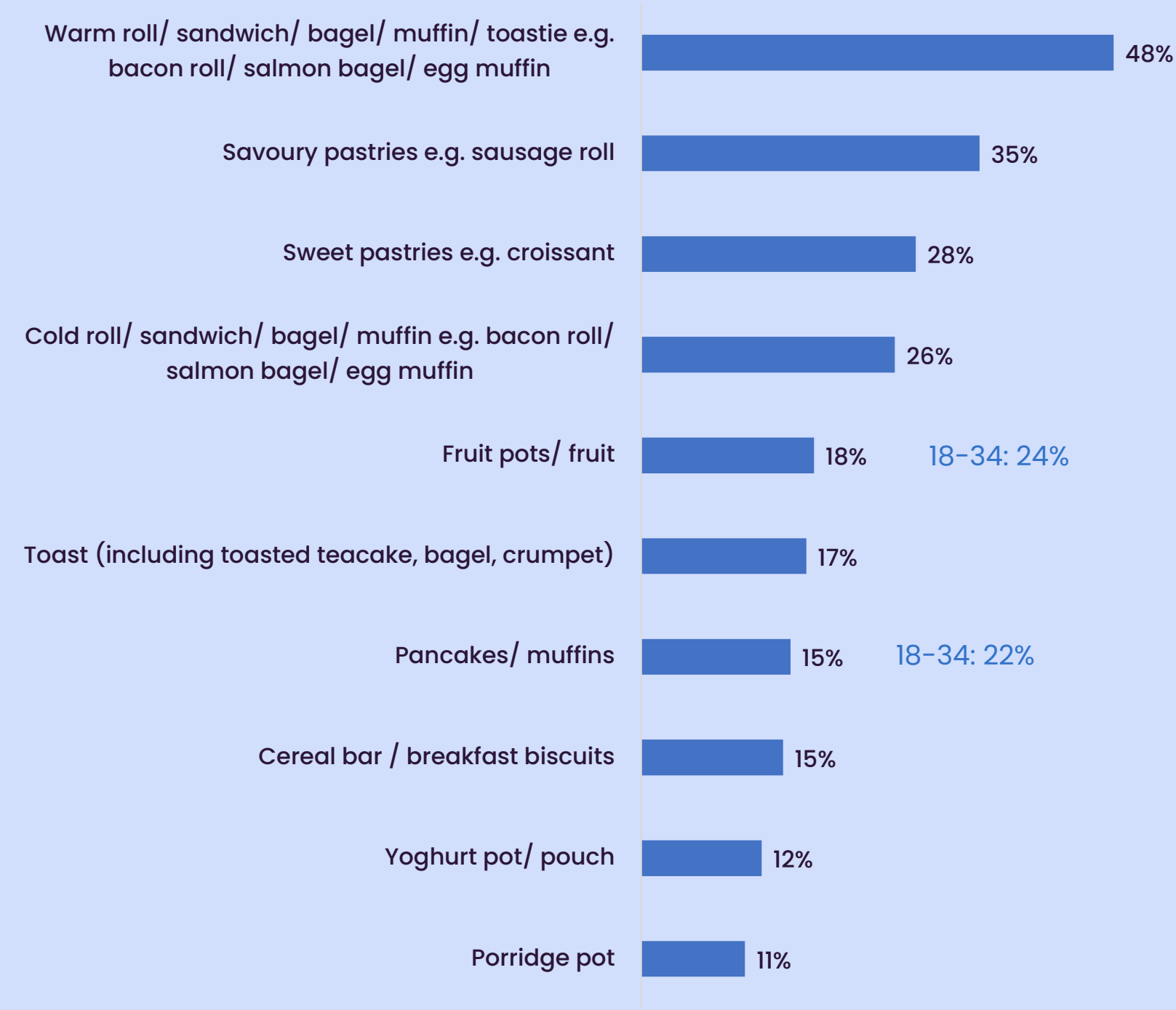
At Lunch



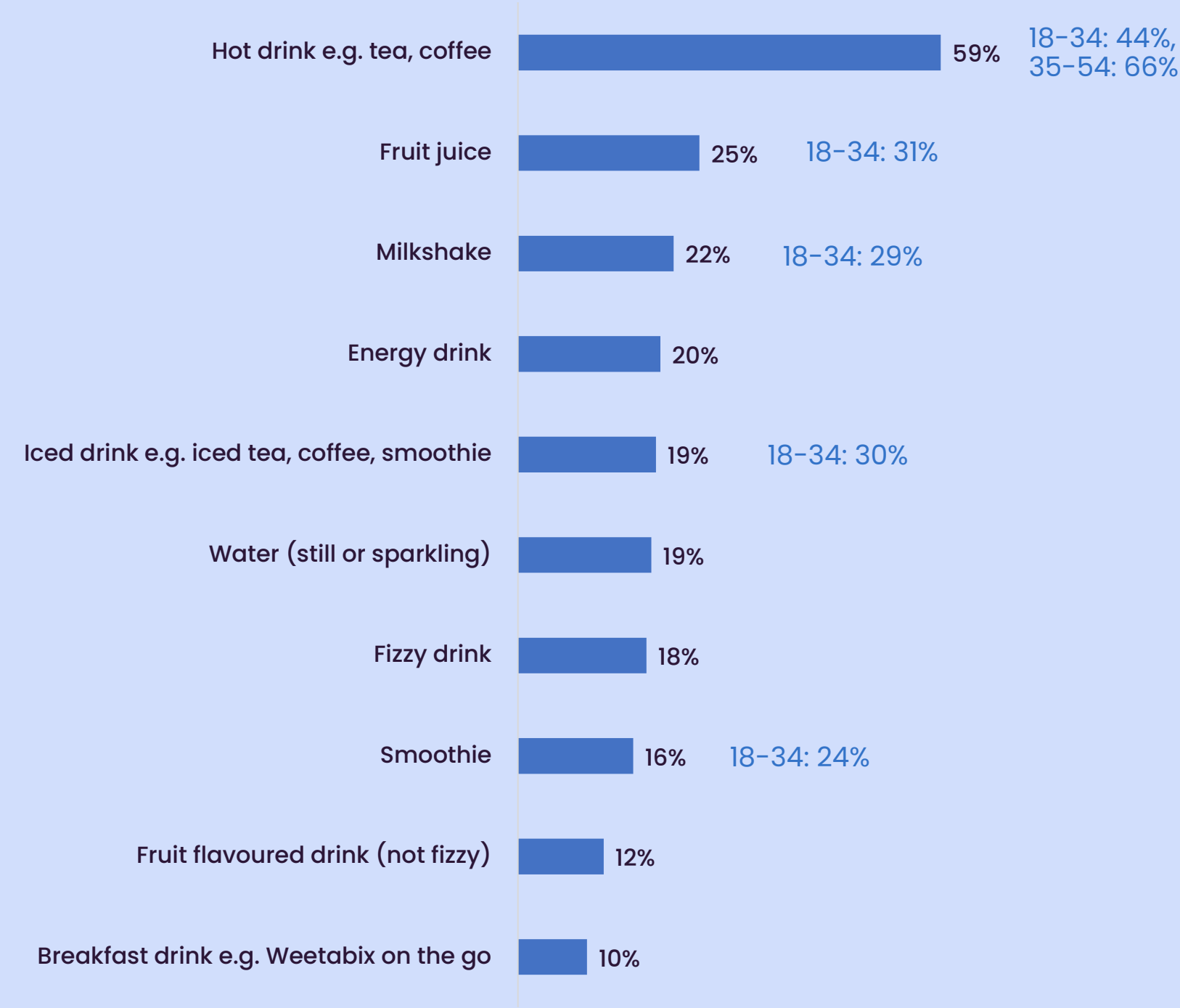
Base; 448 Q When buying breakfast on the go, what do you usually buy? Base; 551 Q When buying lunch on the go, what do you usually buy?
(Levercliff Tracker Ed. 15 - Oct 2024)

Younger consumers are choosing a broader range of cold drinks.

Food



Drink



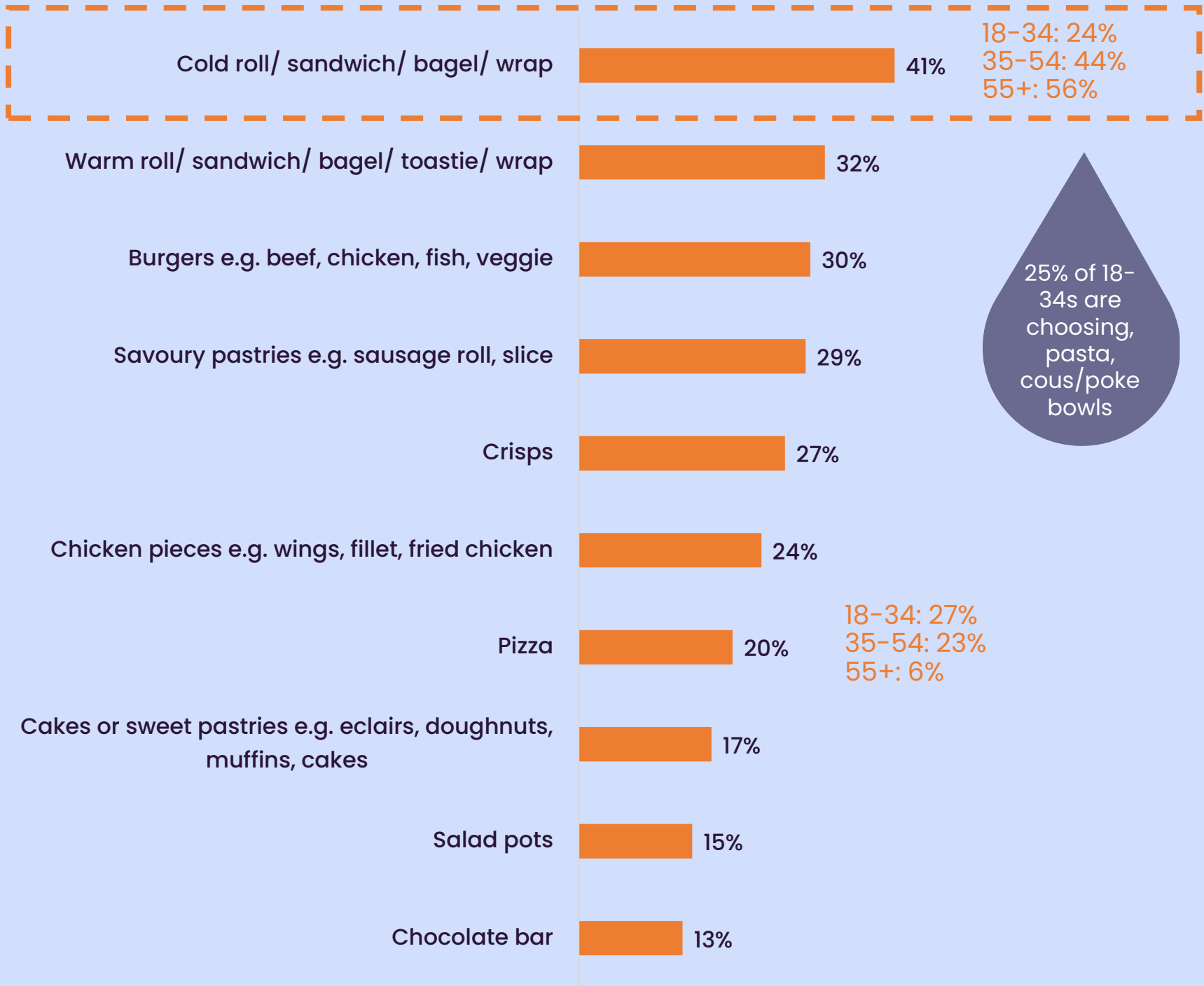
Base; 413 Q When buying breakfast on the go, what food items do you usually buy? Base; 390 Q When buying breakfast on the go, what drink items do you usually buy? (Levercliff Tracker Ed. 15 – Oct 2024)

Top Food and Drink Items Purchased for Lunch On The Go

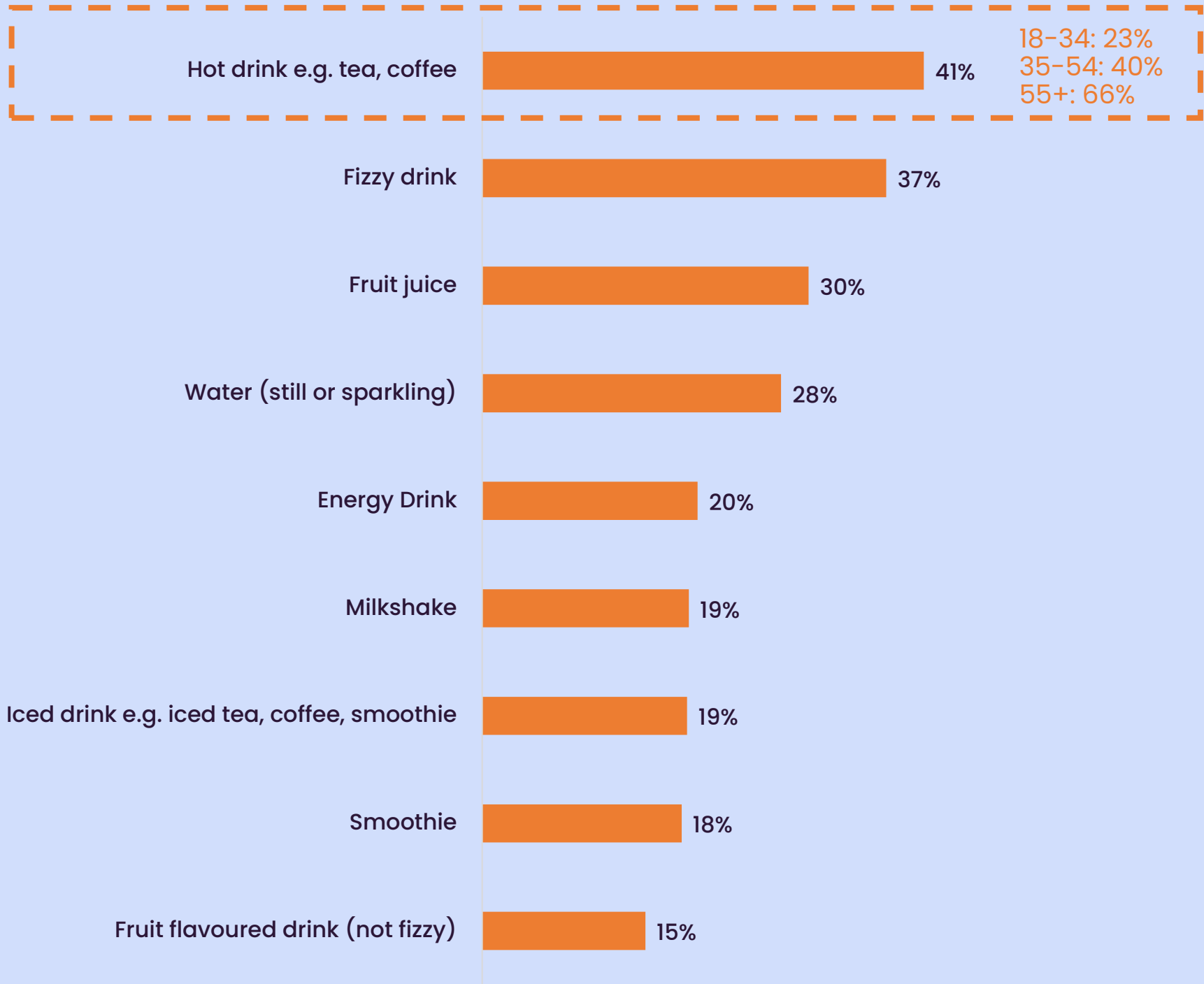


A bias towards older consumers choosing cold sandwiches and hot drinks.

Food



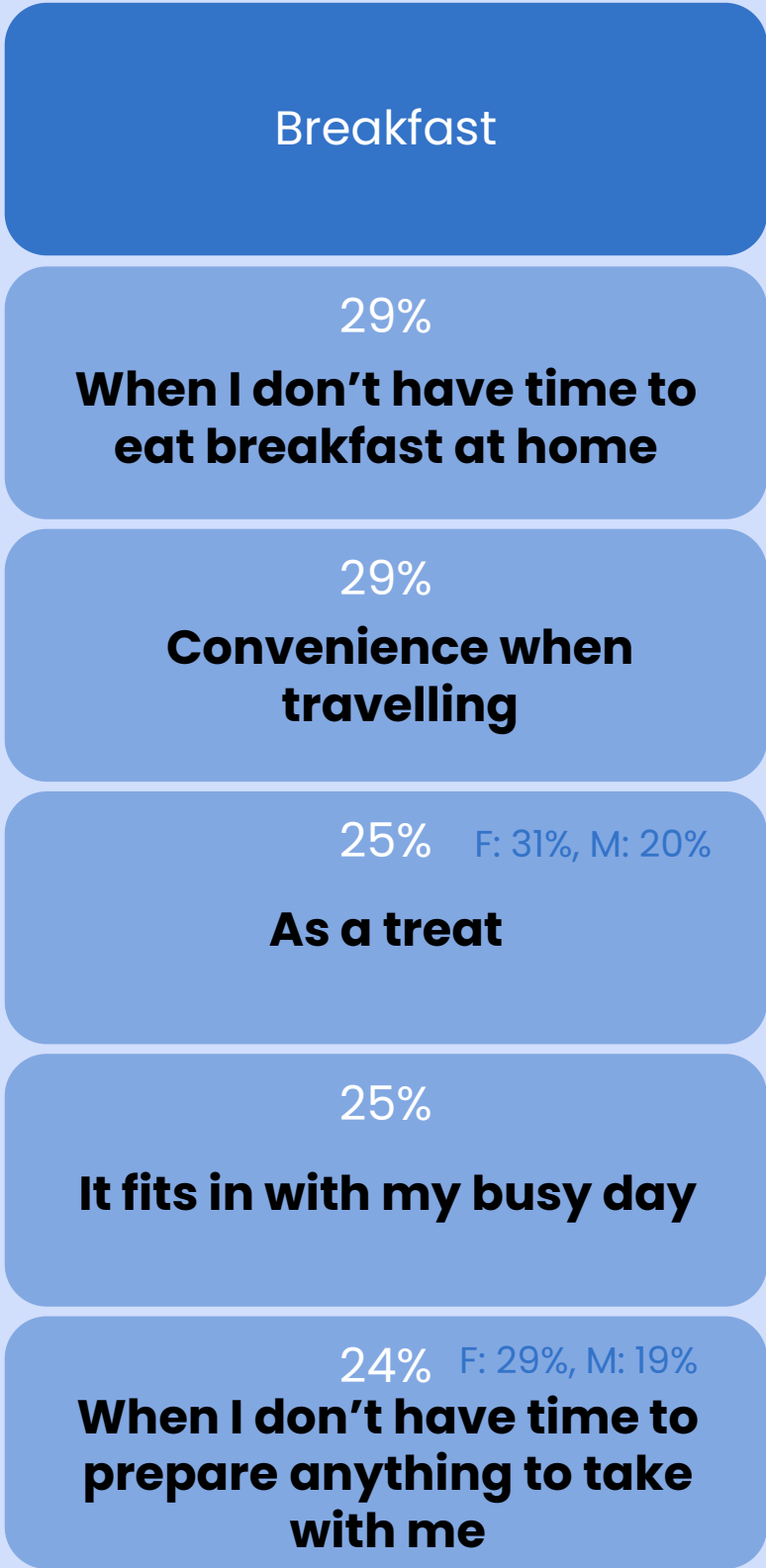
Drink



Base; 527 Q When buying lunch on the go, what food items do you usually buy? Base; 462 Q When buying lunch on the go, what drink items do you usually buy? (Levercliff Tracker Ed. 15 – Oct 2024)

Top Reasons for Purchasing Breakfast and Lunch On The Go

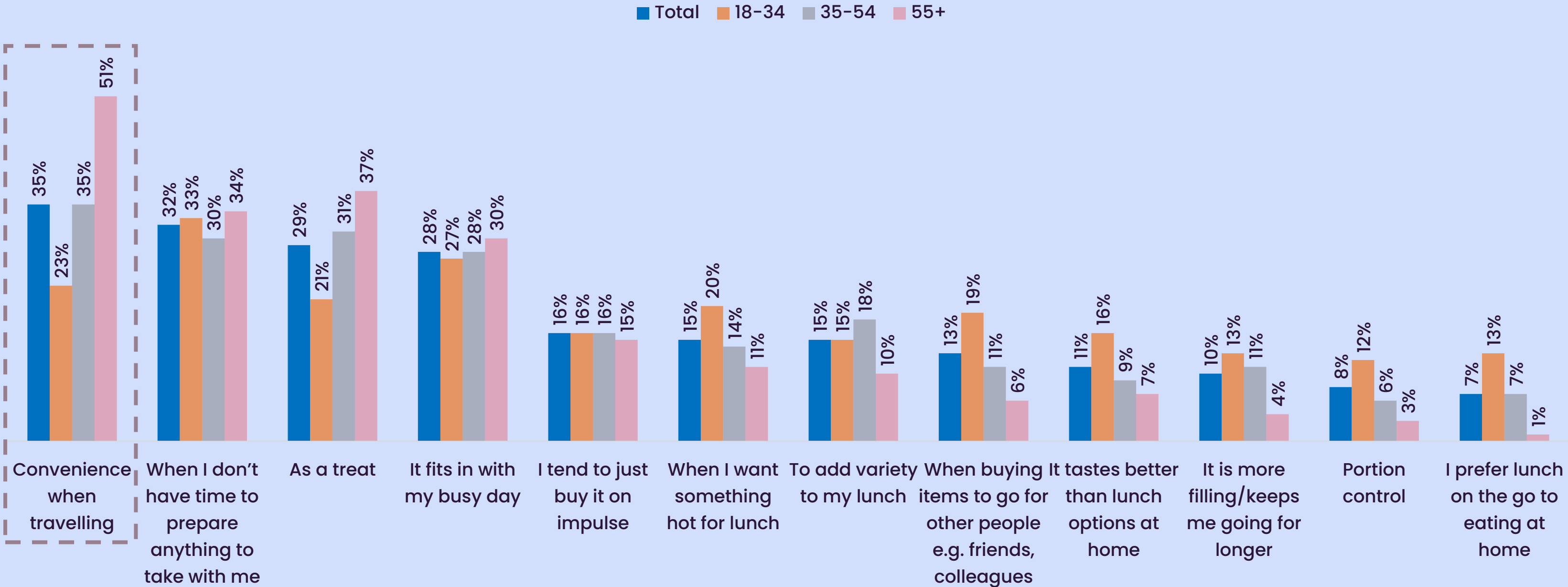
Convenience is the big driver for breakfast and lunch on the go



Top Reasons for Purchasing Lunch On The Go, by Age

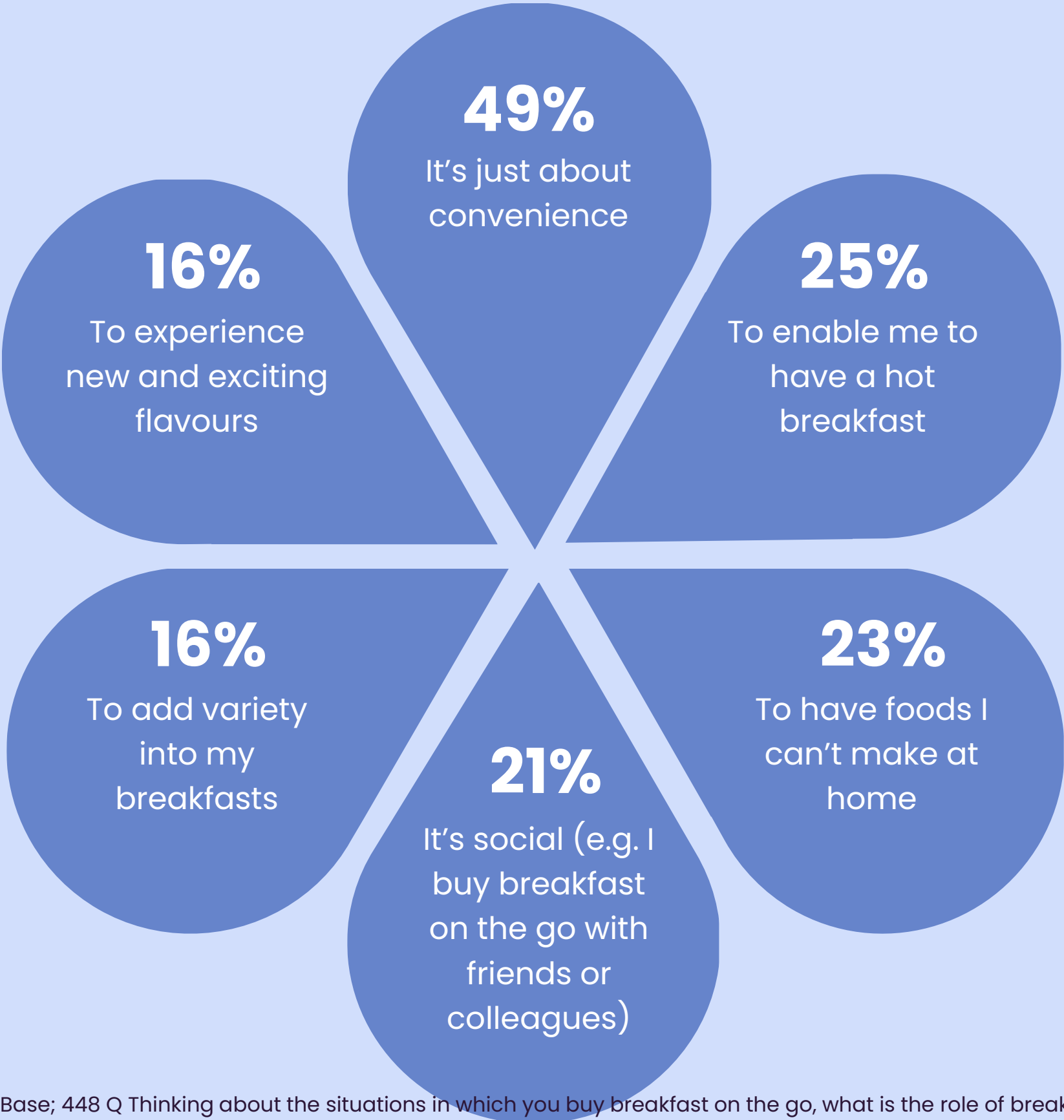


The importance of the travel occasion varies significantly by age.



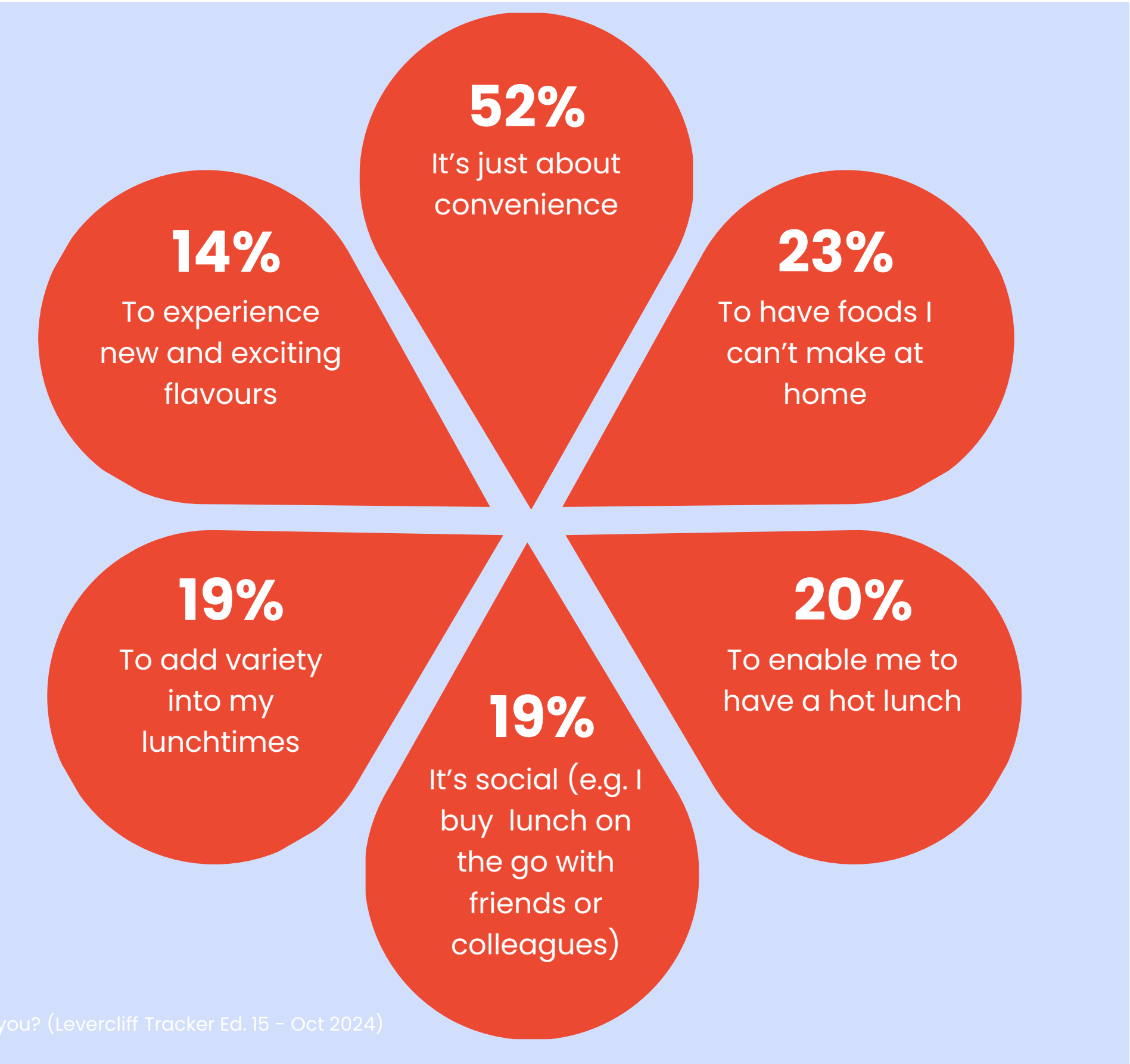
Base; 551 Q For what reasons do you buy lunch on the go? (Levercliff Tracker Ed. 15 - Oct 2024)

Convenience is key, but breakfast on the go does deliver other benefits.



Base; 448 Q Thinking about the situations in which you buy breakfast on the go, what is the role of breakfast on the go for you rather than having it at home? (Levercliff Tracker Ed. 15 - Oct 2024)

For the lunch occasion, convenience is also the main driver.



Base; 551 Q Thinking about the situations in which you buy lunch on the go, what is the role of lunch on the go for you? (Levercliff Tracker Ed. 15 - Oct 2024)

**Over 90% of consumers
are at least satisfied with
the current breakfast/
lunch on the go offering
from current outlets**

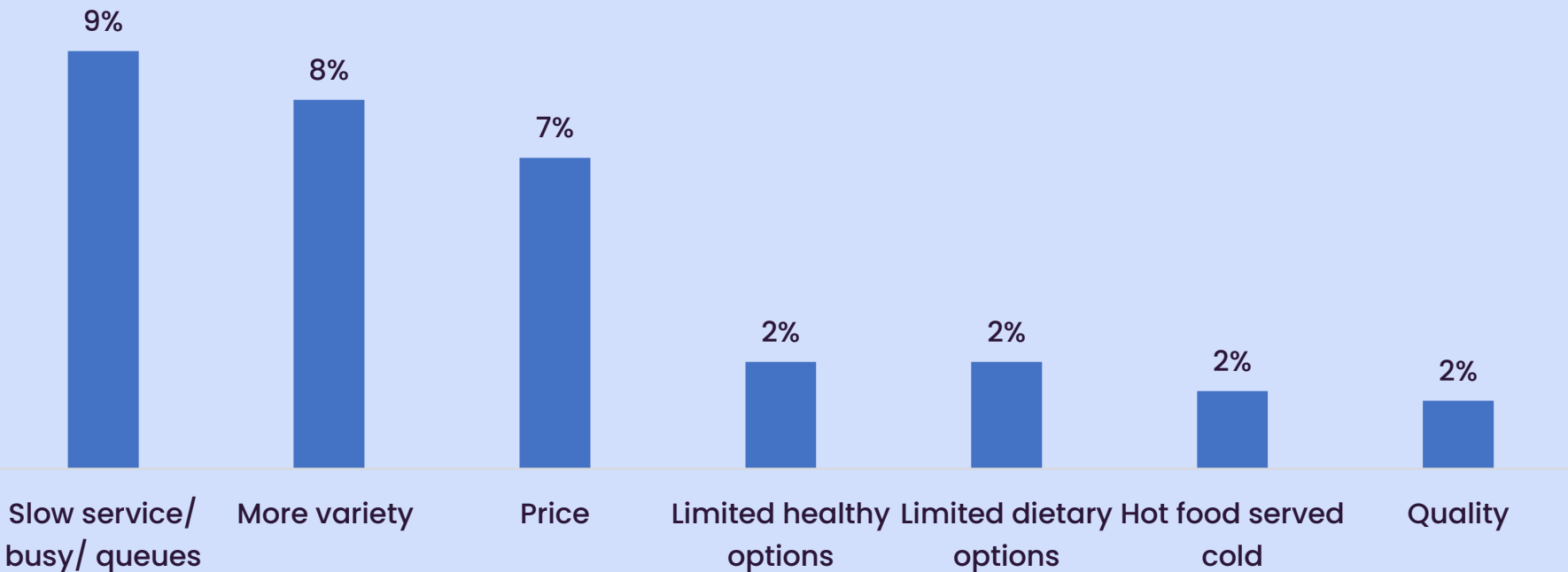


Base; 448 Q Thinking about breakfast on the go, overall how satisfied are you with the breakfast options from the outlet/s you buy from? Base; 551 Q Thinking about lunch on the go, overall how satisfied are you with the lunch options from the outlet/s you buy from? (Levercliff Tracker Ed. 15 - Oct 2024)

Photo by Eye for Ebony on Unsplash

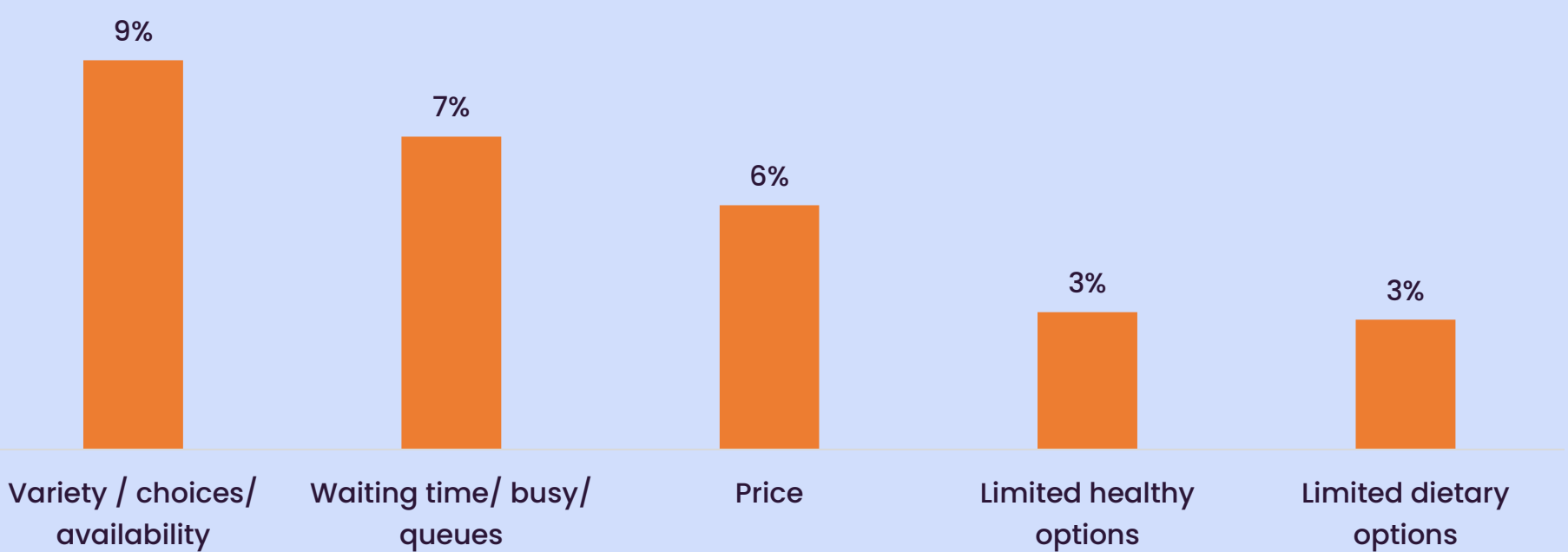
Top frustrations are around slow service and desire for more variety.

Top On The Go Breakfast Frustrations



60% of regular on the go breakfast consumers don't have any frustrations

Top On The Go Lunch Frustrations



63% of regular on the go lunch consumers don't have any frustrations

Base; 460* not weighted (open text) Q Is there anything that you find frustrating about buying breakfast on the go or is there anything missing that you would like to see? Base; 558* unweighted (open text) Q Is there anything that you find frustrating about buying lunch on the go or is there anything missing that you would like to see? (Levercliff Tracker Ed. 15 - Oct 2024)

Breakfast/ Lunch On The Go Statements – Agree and Strongly Agree

Levercliff

Over half of consumers would like to see more locally sourced options.



Almost 50% of consumers who buy regularly find it hard to avoid UPFs.

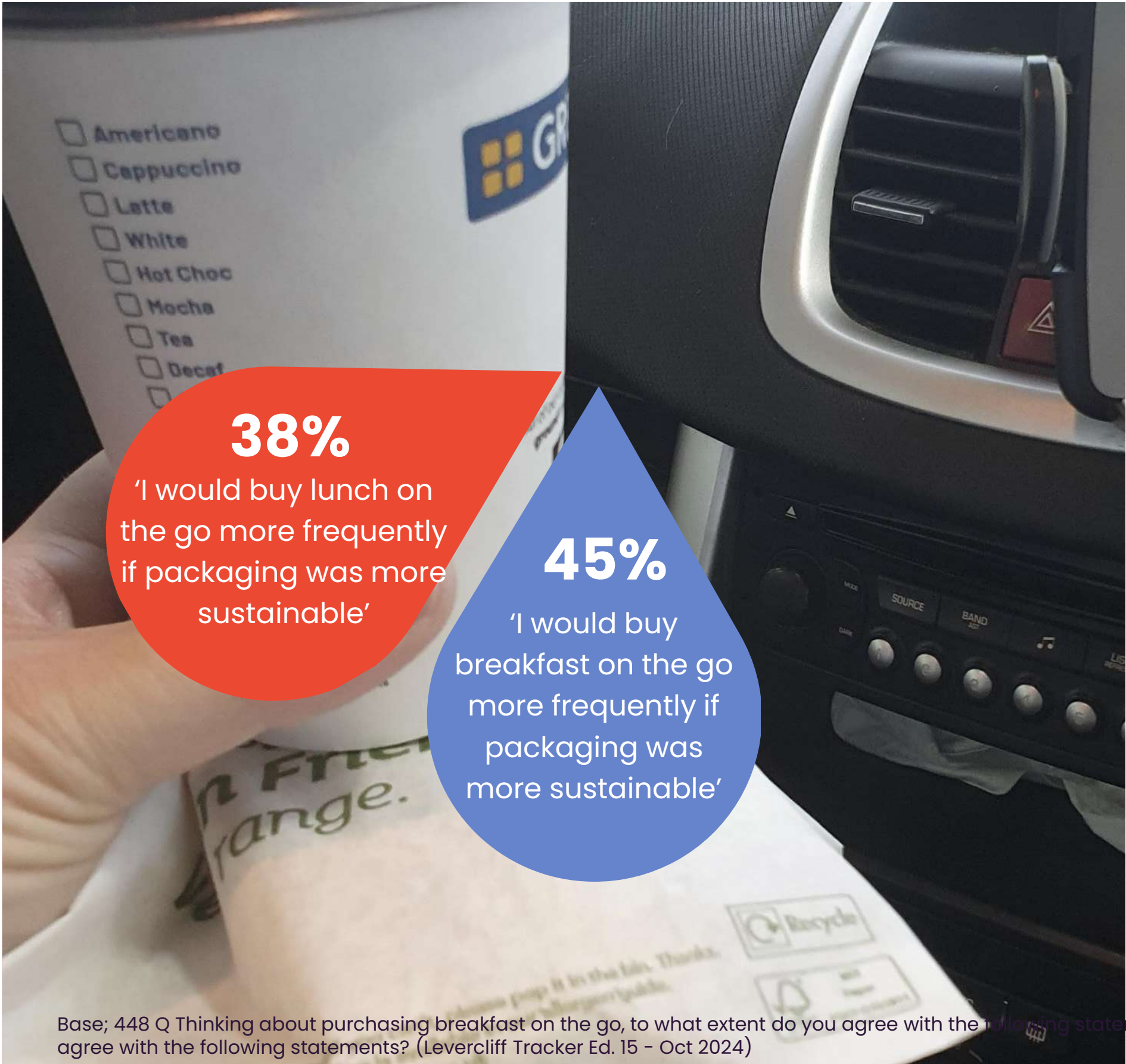


Providing solutions to messy options could increase sales of said products.

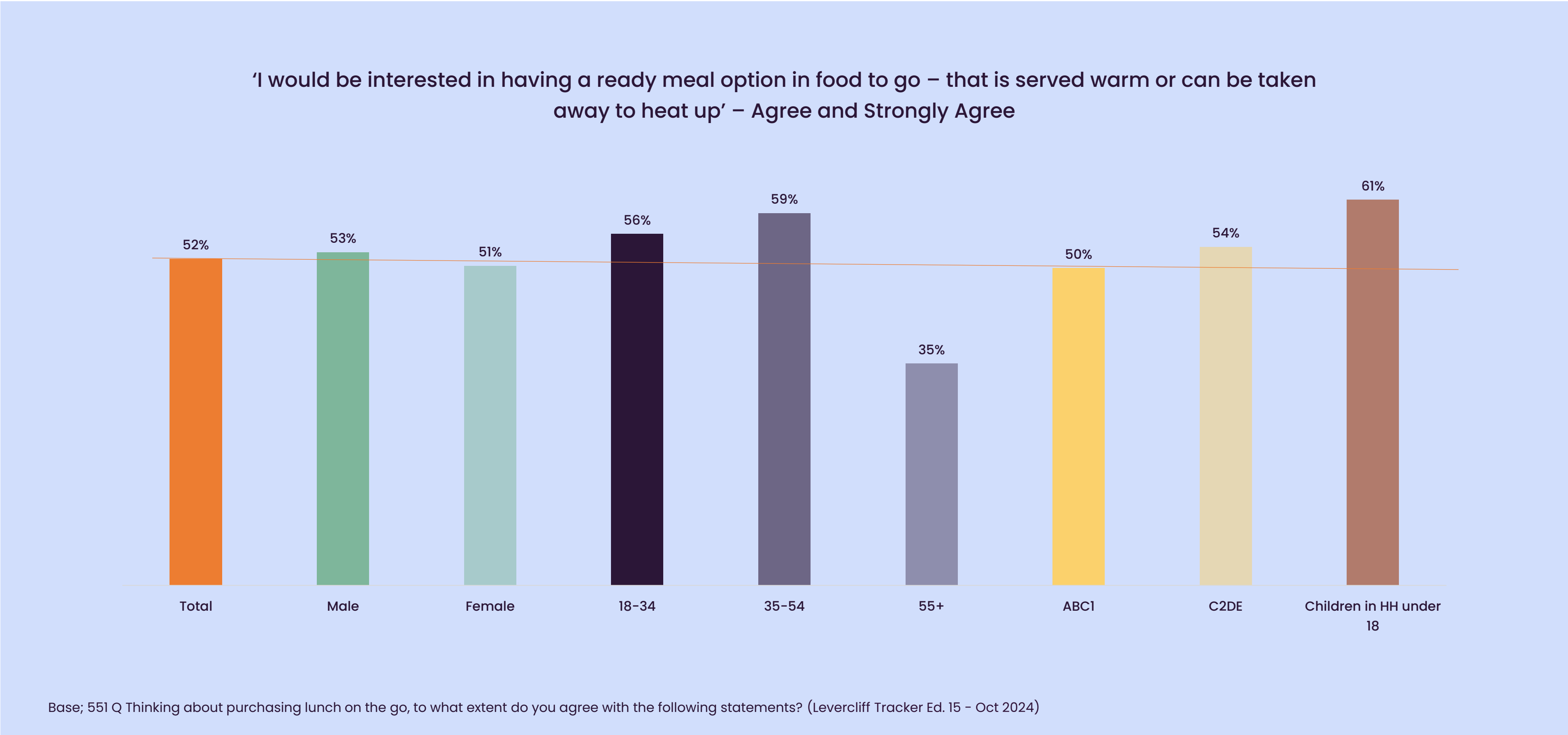


Base; 448 Q Thinking about purchasing breakfast on the go, to what extent do you agree with the following statements? Base; 551 Q Thinking about purchasing lunch on the go, to what extent do you agree with the following statements? (Levercliff Tracker Ed. 15 - Oct 2024)

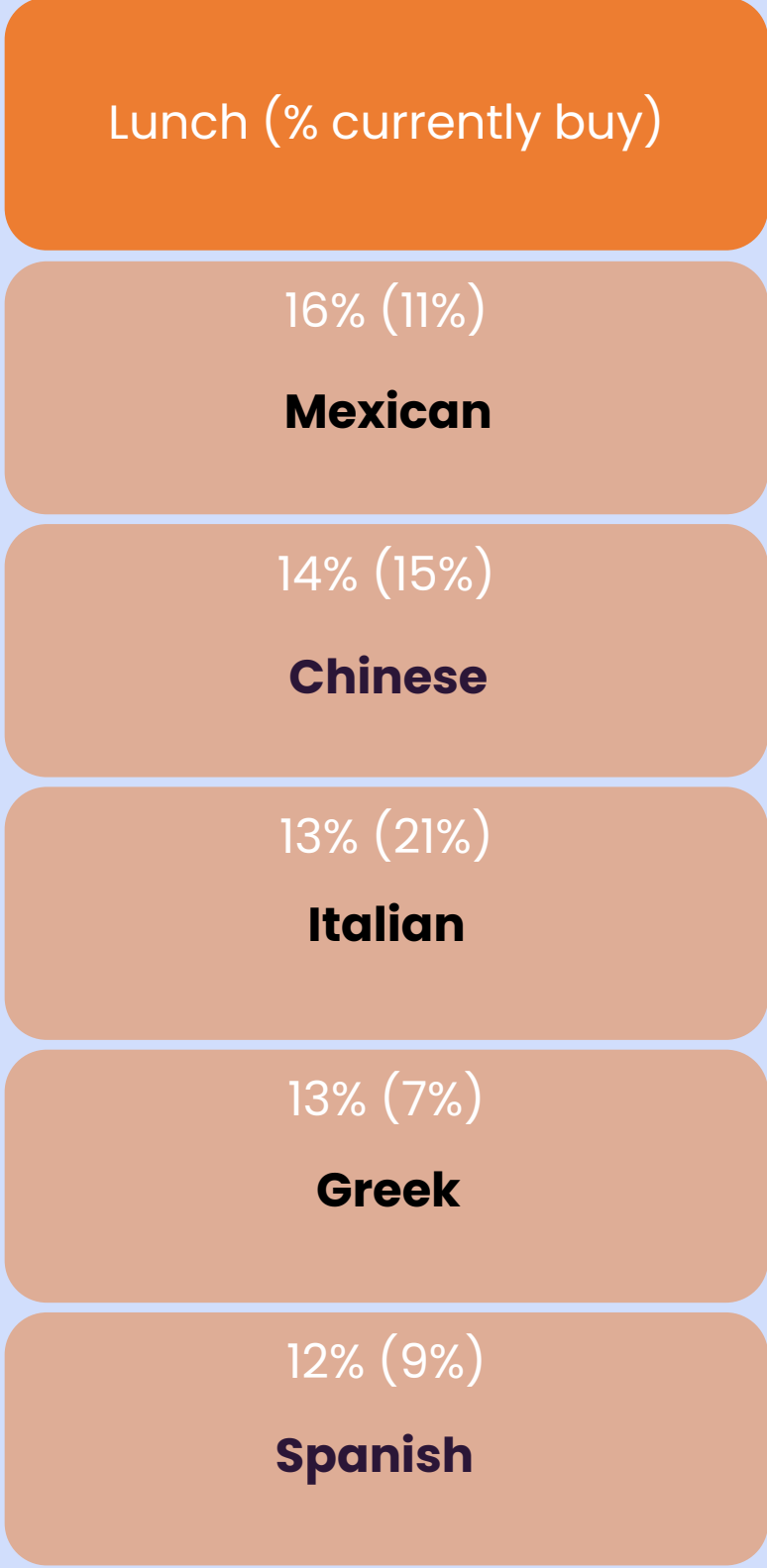
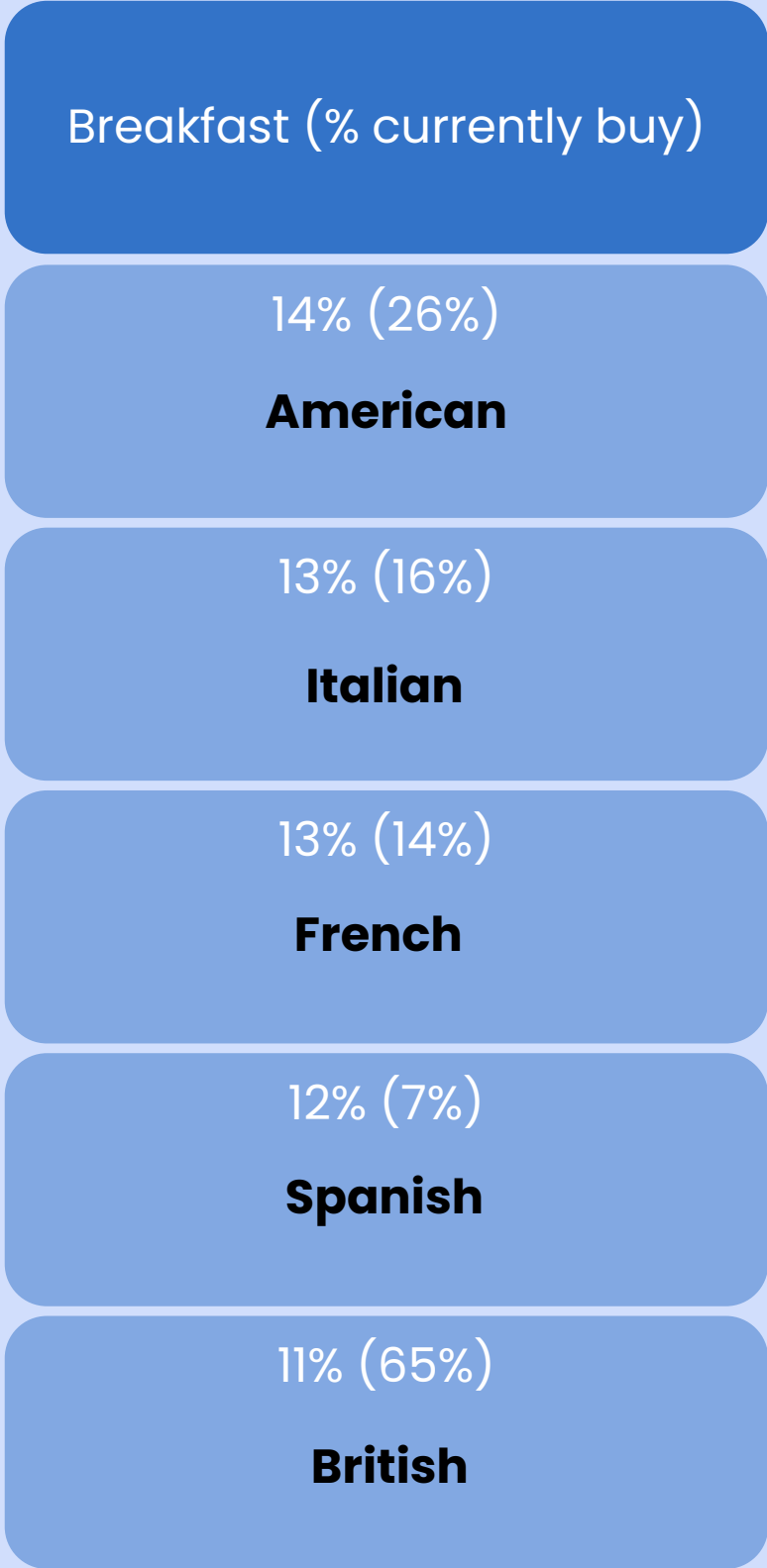
Sustainability does concern consumers in a food on the go setting.



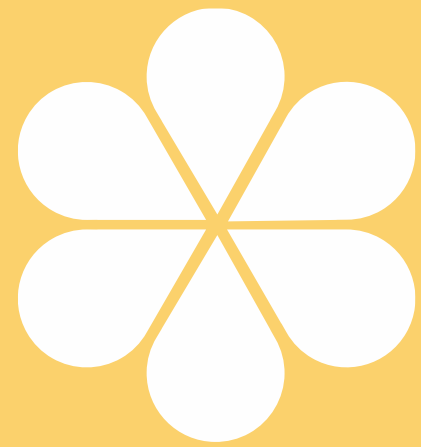
There is appetite for a ready meal option at the lunch on the go occasion.



Italian and Spanish appear to be in demand for breakfast and lunch.



Base; 448 Q Which, if any, of the following cuisine types do you currently buy for breakfast on the go? Base; 448 Q And which would you like to be able to buy as food on the go for breakfast? Base; 551 Q Which, if any, of the following cuisine types do you currently buy as food on the go for lunch? Base; 551 Q And which would you like to be able to buy as food to go for lunch? (Levercliff Tracker Ed. 15 - Oct 2024)



**Now we move away from food
and drink on the go and focus
on eating out generally**

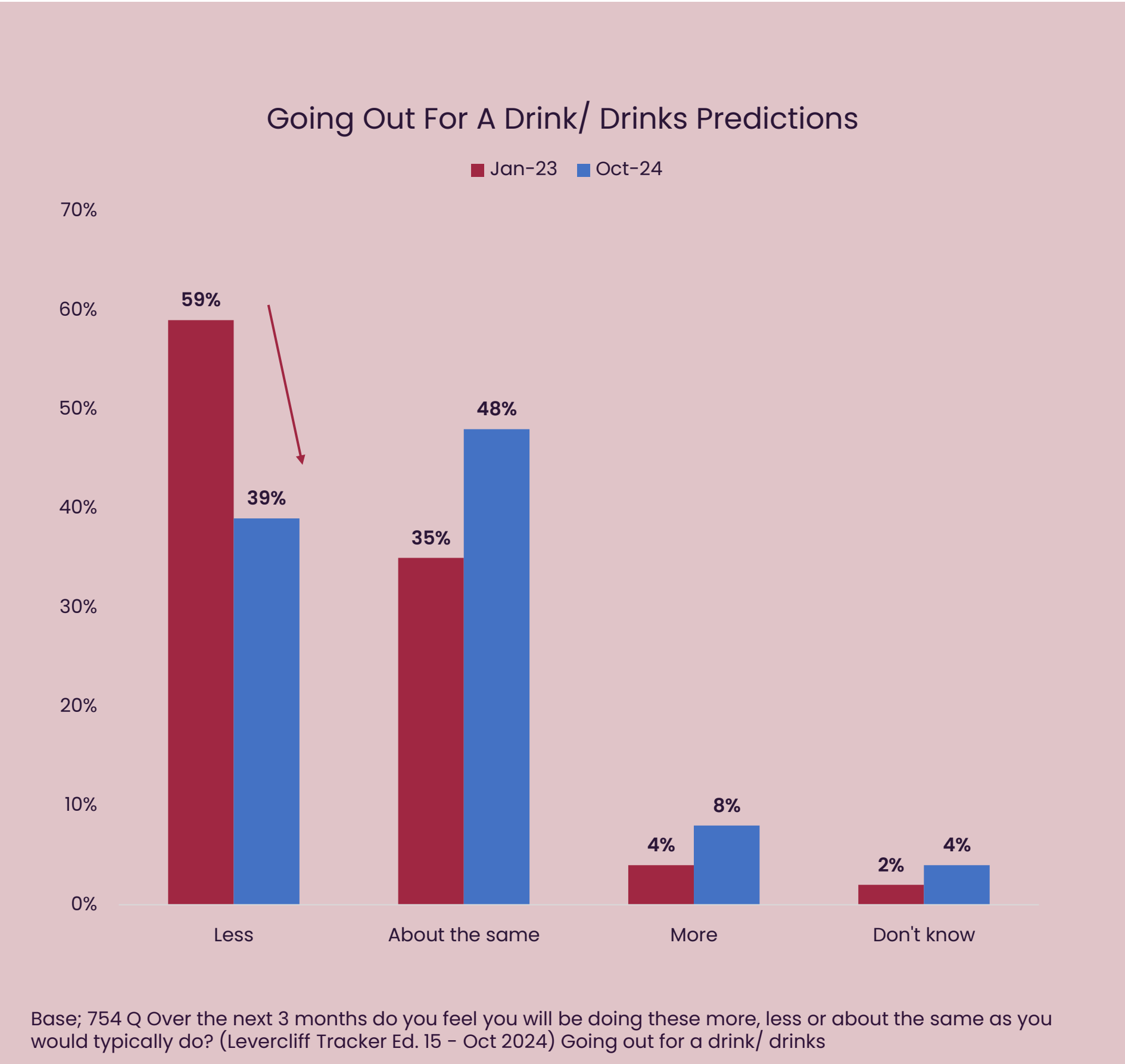
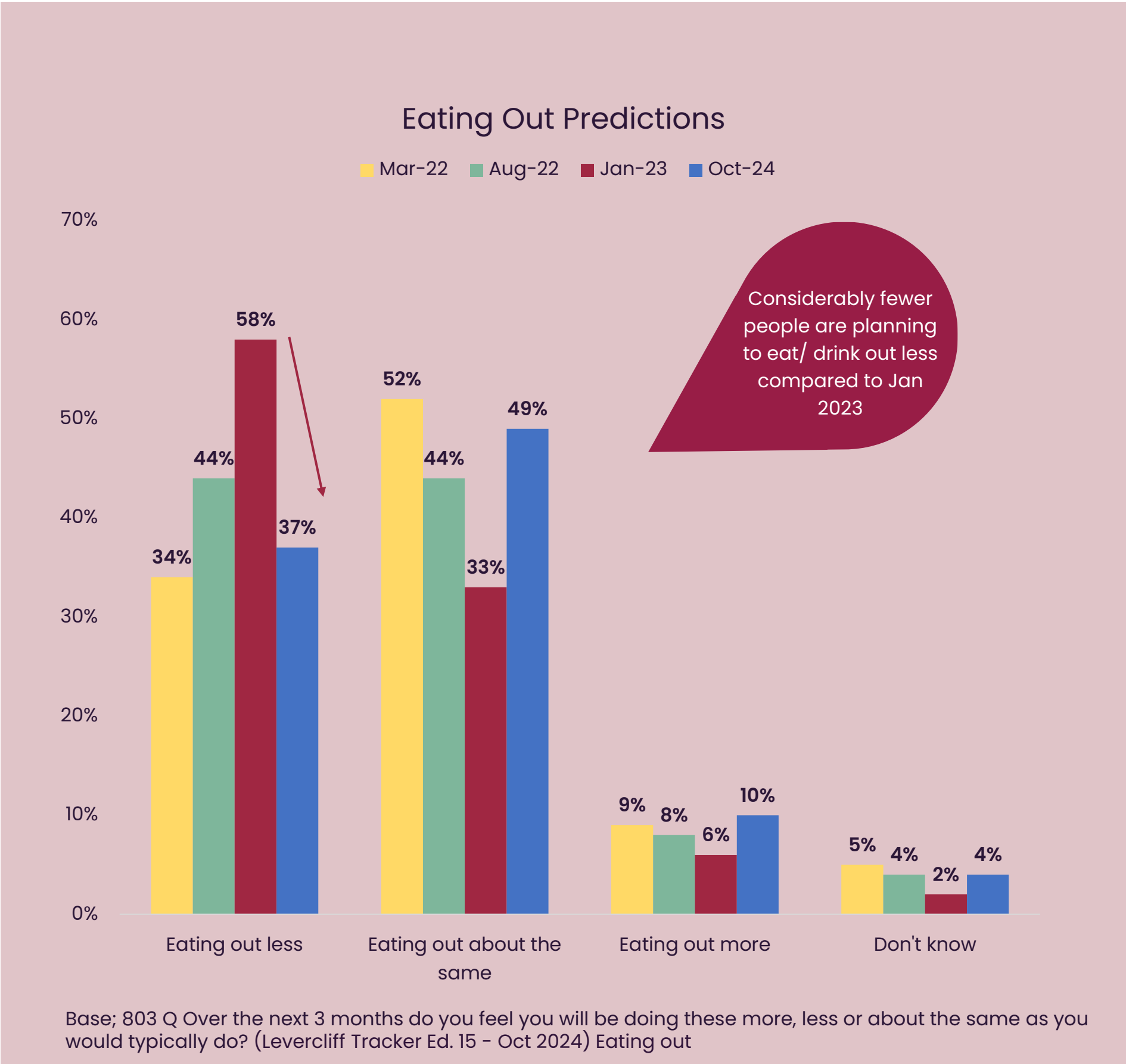


How are consumers feeling about eating and drinking out?

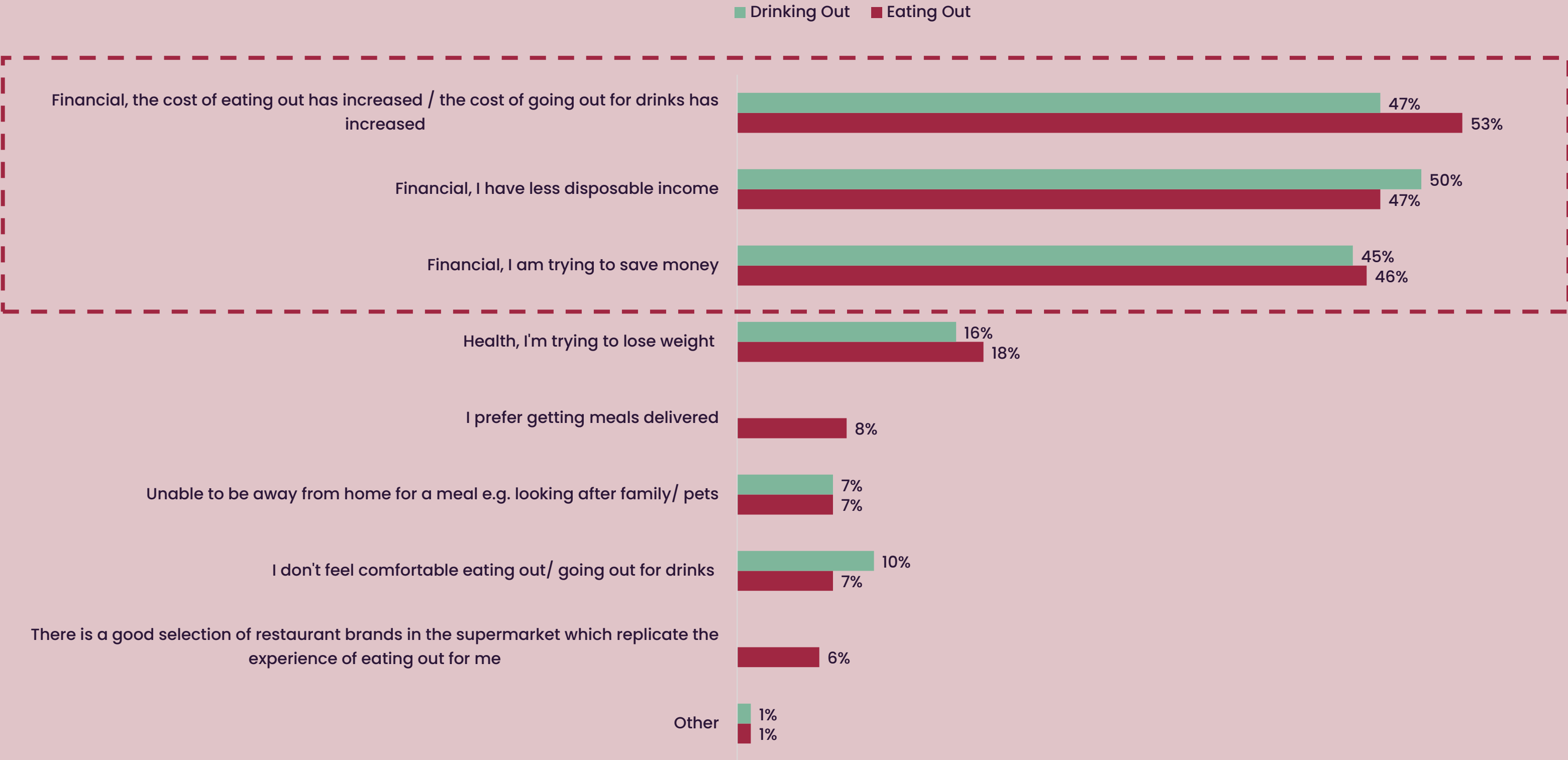
Eating Out and Drinking Out Predictions For Next 3 Months, Over Time

Levercliff

Some evidence that the negative tide has turned for eating & drinking OOH.

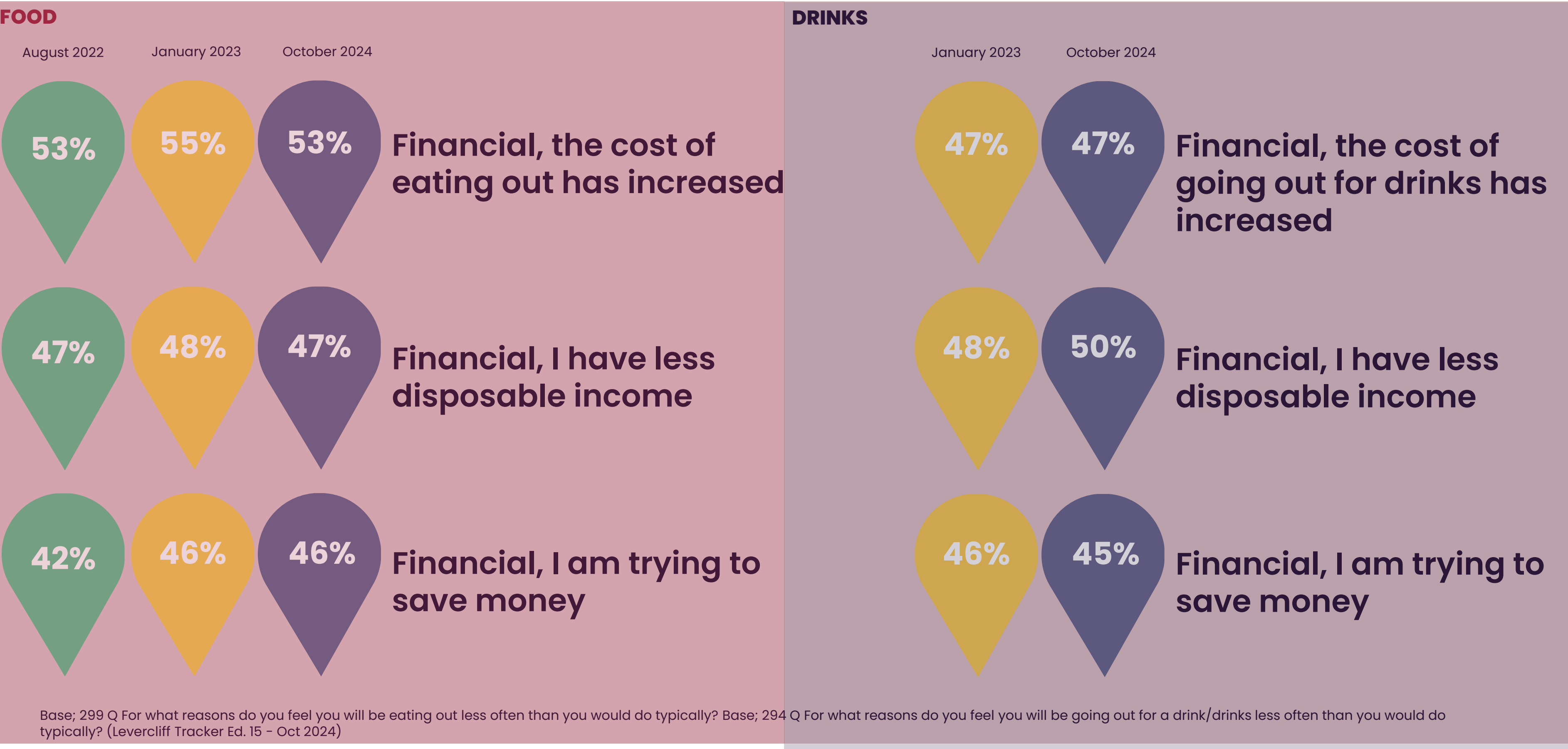


Financial concerns are the top reason for eating out less.



Base; 299 Q For what reasons do you feel you will be eating out less often than you would do typically? Base; 294 Q For what reasons do you feel you will be going out for a drink/drinks less often than you would do typically? (Levercliff Tracker Ed. 15 - Oct 2024)

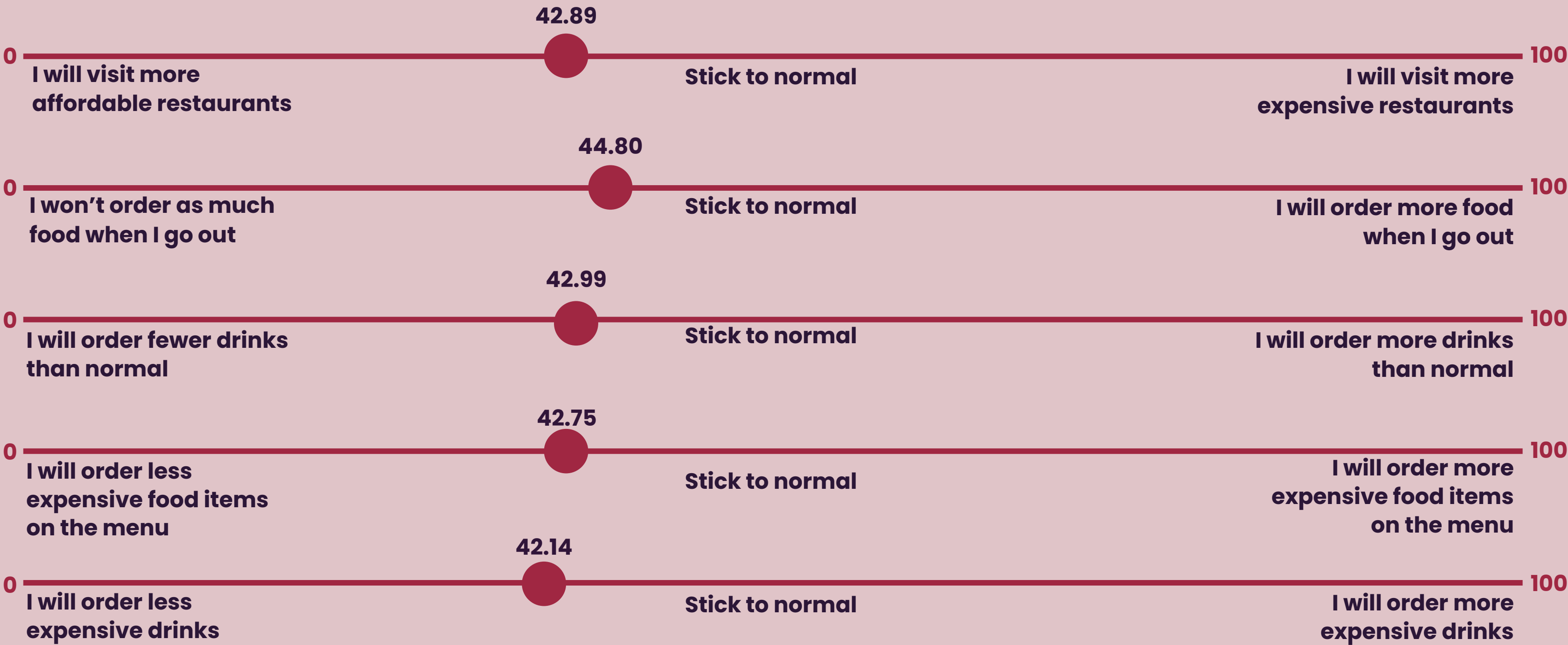
Financial reasons have consistently been the top motivation over time.



Eating Out Behaviour Over The Next 3 Months, Mean

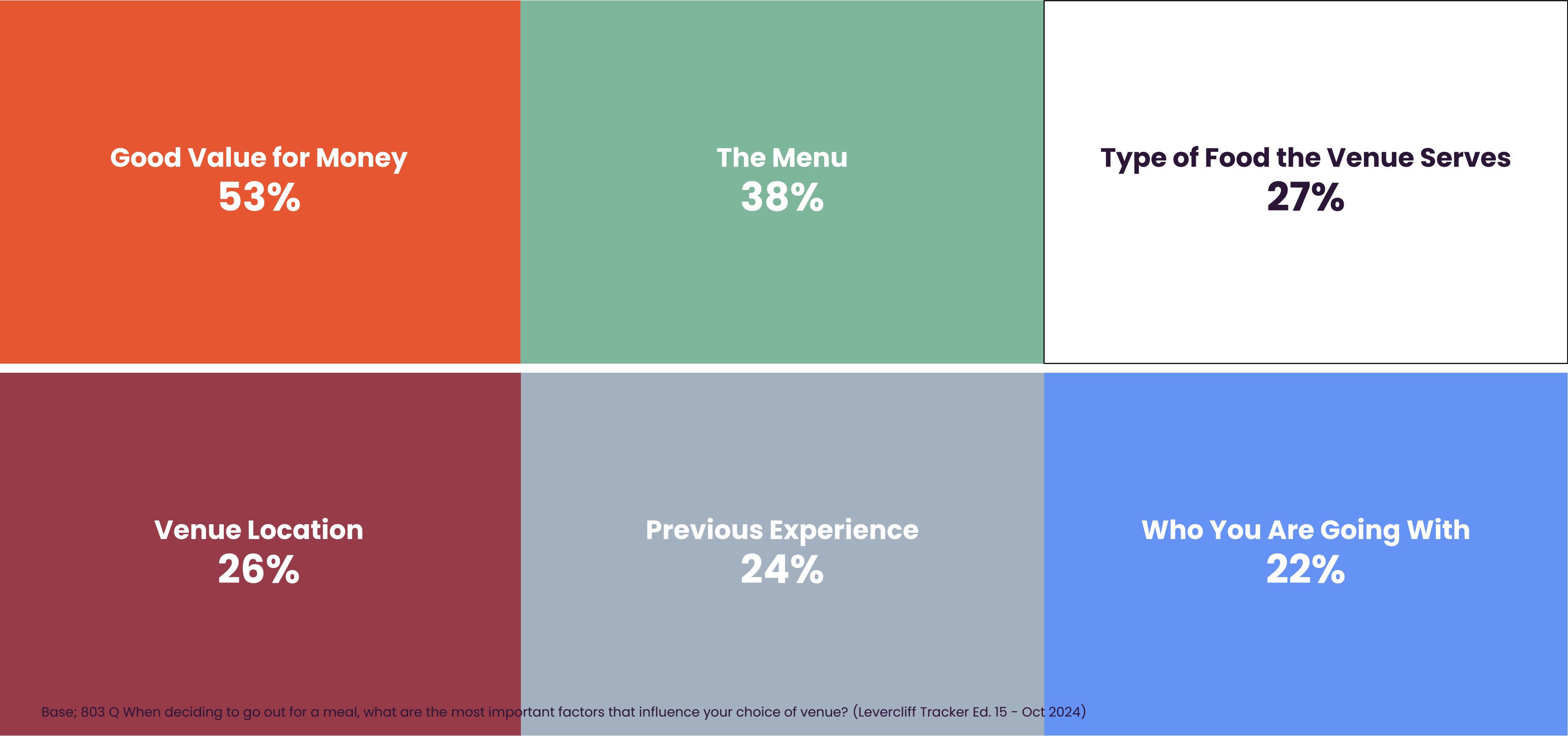
Levercliff

And behaviour is reflective of this, edging towards more economical actions.



Base; 803 Q And which, if any, of the following do you think you will do over the next 3 months if eating out? (Levercliff Tracker Ed. 15 - Oct 2024)

It is important that restaurants demonstrate value for money.



Base; 803 Q When deciding to go out for a meal, what are the most important factors that influence your choice of venue? (Levercliff Tracker Ed. 15 - Oct 2024)

Over 35's are fairly aligned however younger consumers top 6 do differ.



Base; 803 Q When deciding to go out for a meal, what are the most important factors that influence your choice of venue? (Levercliff Tracker Ed. 15 - Oct 2024)

Top Reasons for Eating Out Over The Last 6 Months

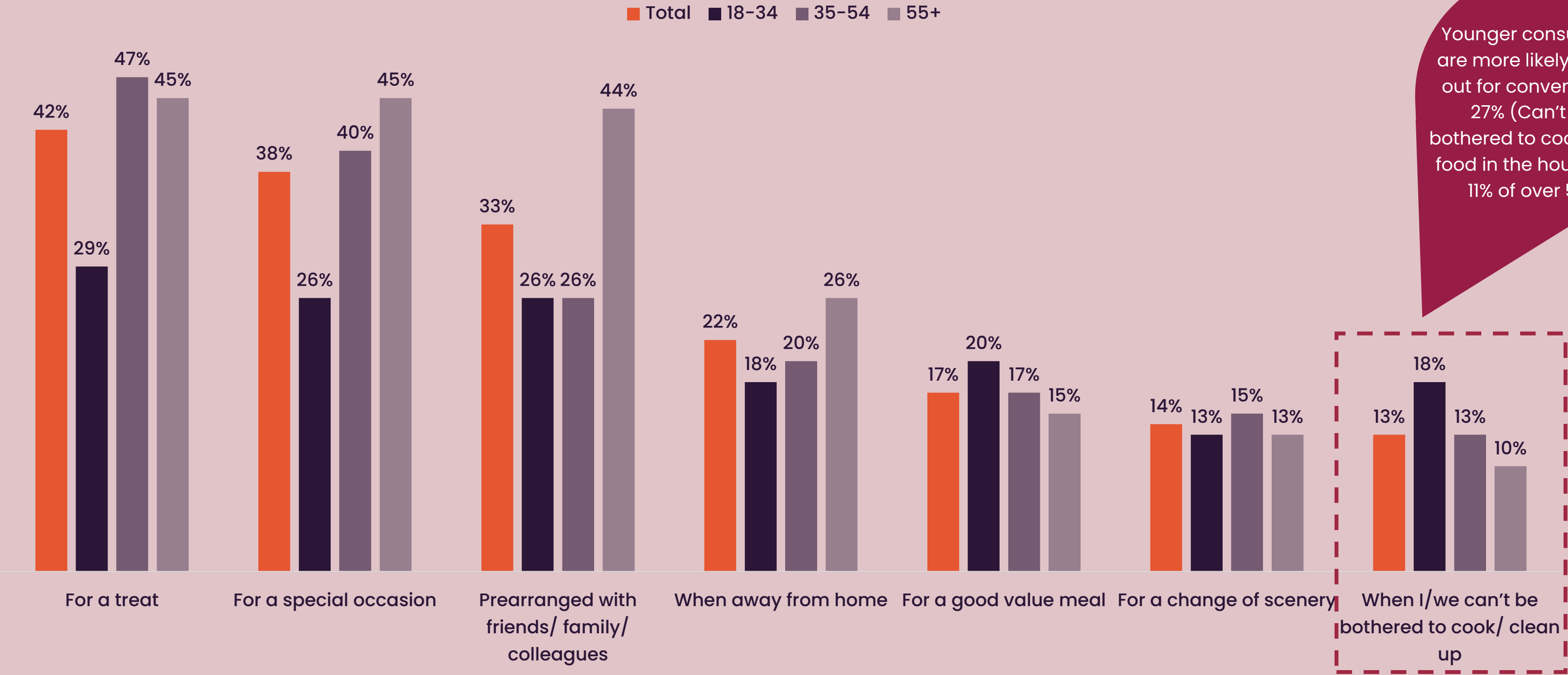


The top reasons for eating out are around treating and special occasions.



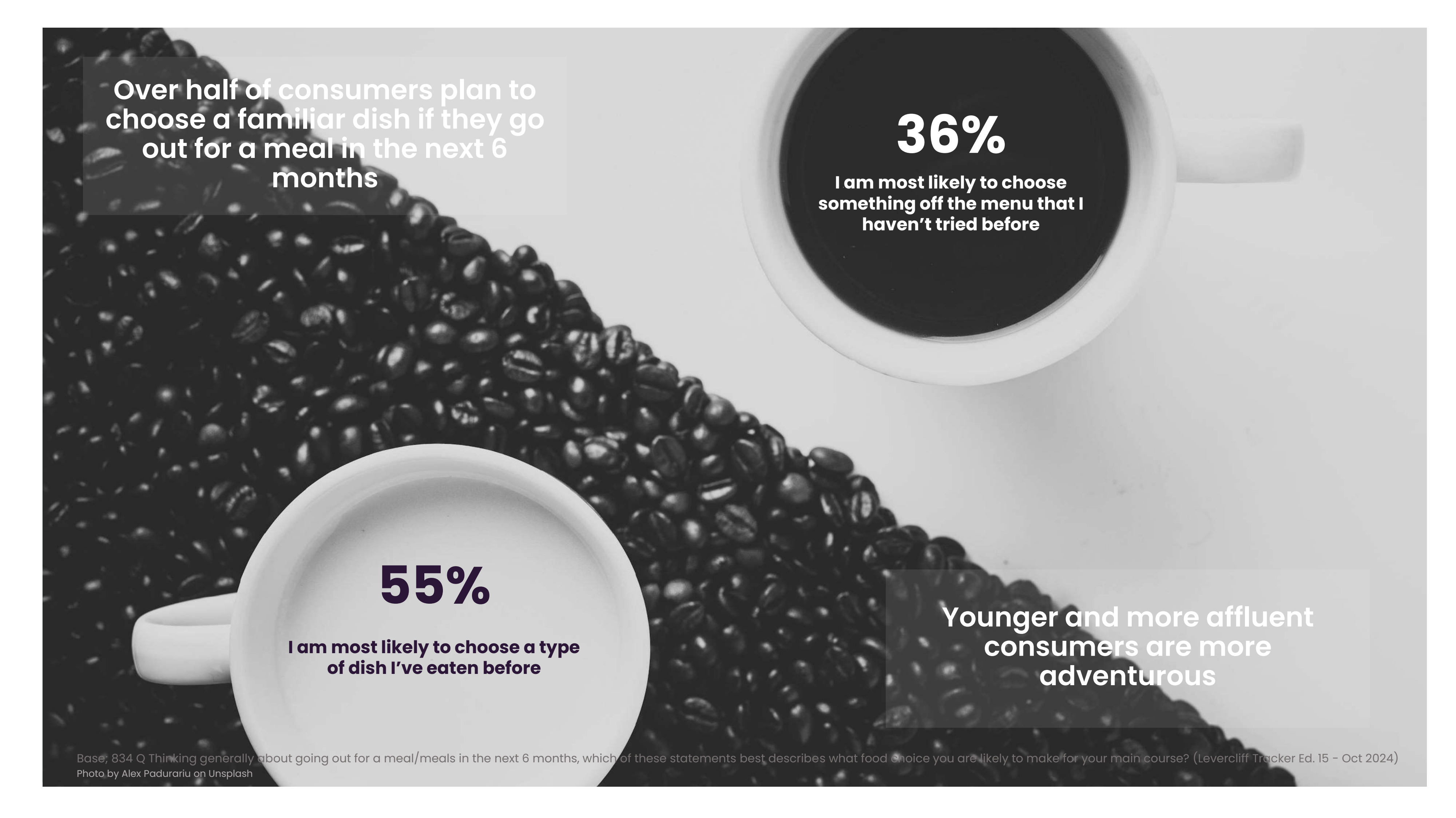
Base: 803 Q Over the last 6 months, what are the main reasons why you have chosen to go out for a meal/ meals? (Levercliff Tracker Ed. 15 - Oct 2024)
Photo by Marco Guerrero on Unsplash

18–34s are less likely to see eating out as a treat.



Younger consumers are more likely to eat out for convenience 27% (Can't be bothered to cook or no food in the house) vs. 11% of over 55s

Base; 803 Q Over the last 6 months, what are the main reasons why you have chosen to go out for a meal/ meals? (Levercliff Tracker Ed. 15 – Oct 2024)

The background of the infographic features a large pile of dark coffee beans on the left side, sloping upwards towards the right. Two white ceramic coffee cups are positioned on the right side. The cup in the upper right is filled with dark coffee, while the cup in the lower left is empty. Text boxes with white and dark purple text are overlaid on the image.

**Over half of consumers plan to
choose a familiar dish if they go
out for a meal in the next 6
months**

36%

**I am most likely to choose
something off the menu that I
haven't tried before**

55%

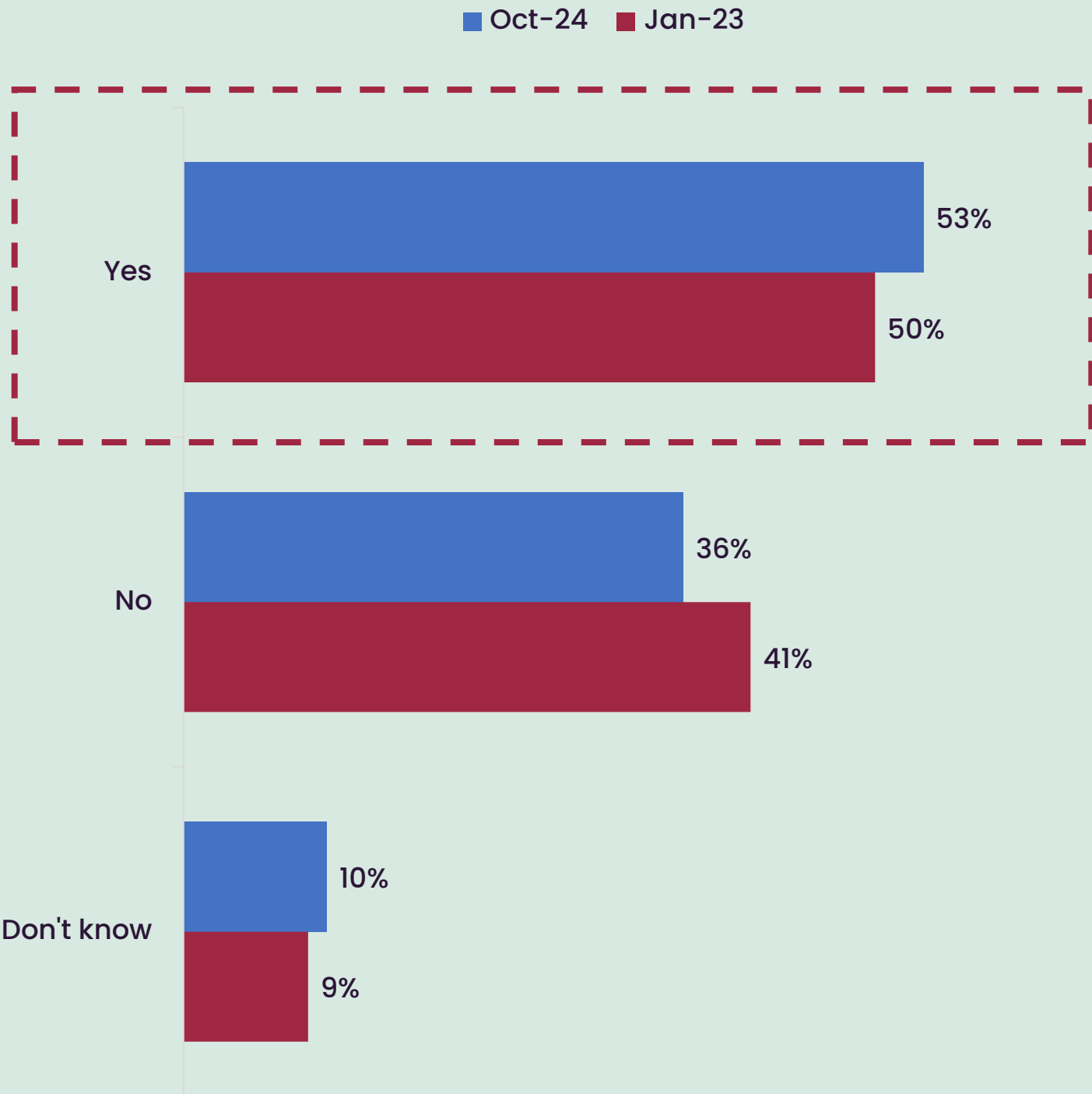
**I am most likely to choose a type
of dish I've eaten before**

**Younger and more affluent
consumers are more
adventurous**

Awareness of Nutritional Information on Restaurant Menus



Awareness of calories on menus is consistent with responses in 2023.



ROMANA PIZZA

A bigger, thinner, crispier pizza, inspired by pizzas from Rome, with more of the toppings you love. NEW – Upgrade to a Large



Duo Romana

When two become one! Choose your two favourite Classic or Romana recipes – or try...



Bruno

1029 kcal

A winning combination. Blue cheese, red onion chutney, tomato, mozzarella, all topped with...



Meatball

Meat our tomato, g



Margherita Pomodoro Pesto

1134 kcal

An elevated classic. Fresh mozzarella, baby plum...



Double American Cheese

1288 kcal

Sometimes you just want more of what you love...

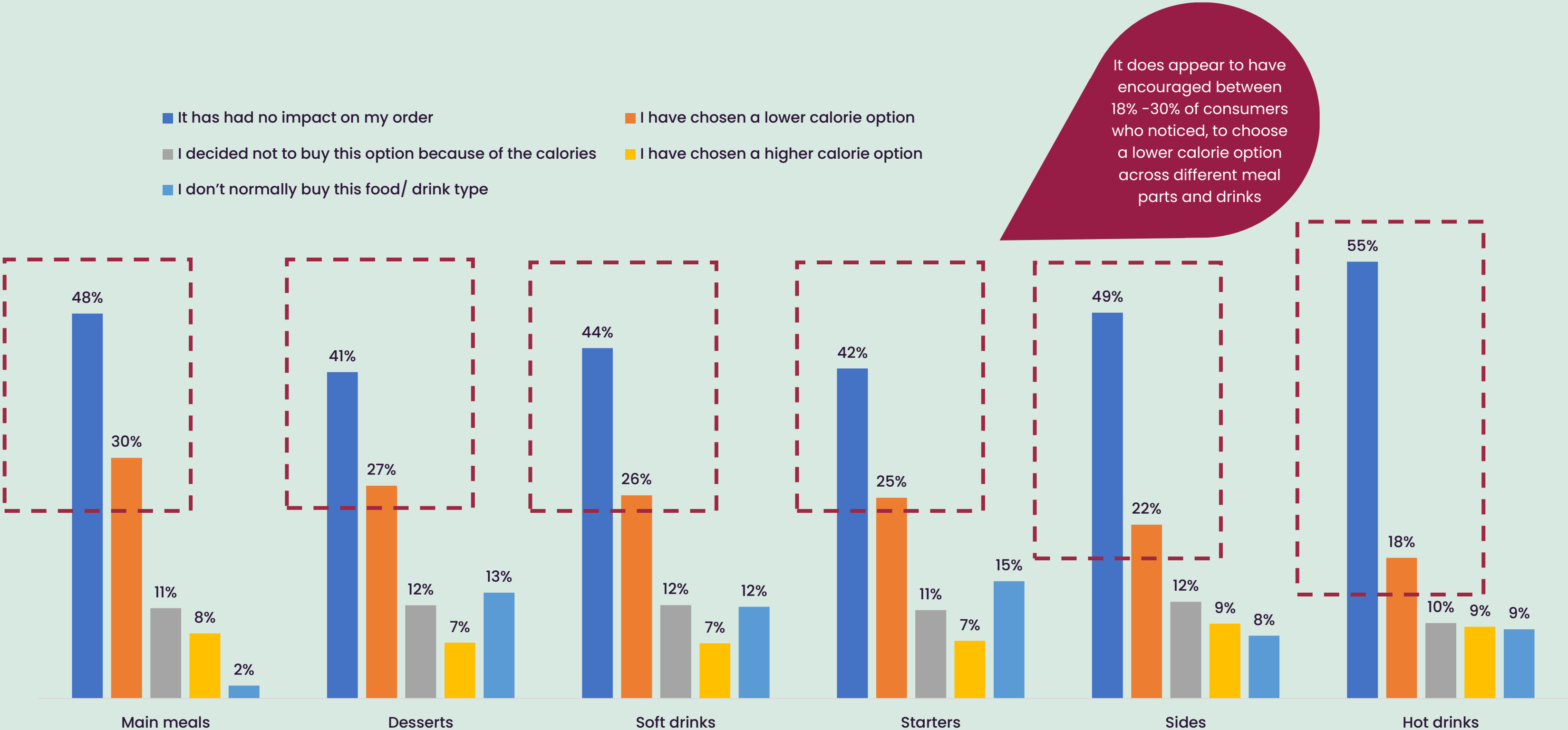


Americano

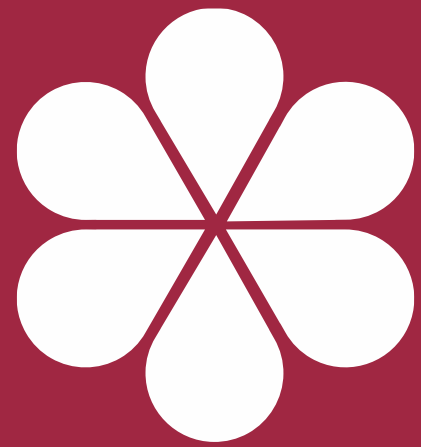
The best

Base; 834 Q Restaurants of a certain size now have to label how many calories are in the food they serve on their menus, websites, and on delivery websites. When eating out, have you noticed calories on menus? (Levercliff Tracker Ed. 15 – Oct 2024)

For the majority, visibility of calories on menus has had no impact.



Base; 446 Q Generally, what has been the impact on your choices from seeing calories on menus for each of the food / drink types below? (Levercliff Tracker Ed. 15 - Oct 2024)



Summary and Key Take Outs

Food To Go

- ✿ Although rising prices as a top concern has fallen since January 2023, it is still a major concern for over 70% of UK consumers.

For food and drink producers and outlets, demonstrating value for money remains key.

- ✿ Over 40% of UK adults buy food or drink on the go at least once a week across breakfast, lunch, dinner or snacking/ refreshments.

Understanding the motivations and occasions for buying food and drink on the go will allow producers and outlets to best serve and target consumers.

Food To Go

- ✿ Snacking and lunch are the most frequented occasions followed by dinner and then breakfast.

Important to find solutions across all day parts that can be consumed on the go – without mess!

- ✿ There is a bias towards hybrid workers buying food or drink on the go the most frequently.

Potential to add variety to what they consume when working at home.

Food to Go

- ✿ Over 40% of consumers who have breakfast on the go typically buy this from fast food outlets, whereas grocery retailers are the first choice for lunch followed by sandwich retailers.

Different outlets are chosen for different occasions. Producers and outlets need to consider what range works best in different locations.

- ✿ Location and price are some of the top deciding factors of where to go however meal deal offers and hot food ranges also influence decisions.

Driving greater volume through offers is important, particularly for outlets competing with retailers for lunch share of pocket.

Food To Go

- ✿ During the week breakfast and lunch items need to fill consumers up, be low cost and easy to consume. At the weekend there is a treat element that comes into force.

Being clear what need you are meeting is important and how this varies by time of week is important.

- ✿ 90% of consumers who have breakfast or lunch on the go are at least satisfied with the offering from their current outlets.

Challenge for producers or outlets will be continuing to satisfy consumers by delivering variety and meeting expectations. Evolving expectations around locally sourced, health, sustainability.

Eating Out

- ✿ The pressure of declining numbers in restaurants and other dine in venues looks to be easing. 59% of consumers plan to eat out the same amount or more often over the next 3 months.

Clearly sector still needs to win back consumers who reduced eating out occasions during COL crisis.

- ✿ For those that plan to eat out less, finances are the main driver for this behaviour.

It is important for restaurants to demonstrate value for money to encourage consumers to visit them.

Eating Out

- ✿ The main reasons for eating out are centered around special occasions and treats.

Food, drinks and dining environment need to deliver something special to feel like value for money.

- ✿ Familiarity is especially important to older consumers when making menu choices whereas younger consumers are more likely to mix it up and take risks.

Outlets need to consider who their target consumers are and adapt menus to best deliver for them.

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