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## The Top Three Quarterly Trends Shaping the Great Britain Foodservice Industry

GDP growth is forecasted at a minimum +2.5 percent for 2014. However, the Governor of the Bank of England warns that the economy has yet to reach its “ultimate goal” of expansion.

The recent encouraging macro-economic factors have had a positive impact on the foodservice industry, resulting in three quarters of traffic growth. However, the full YE March 2014 data still shows a very flat picture for the industry.

QSR and pubs are the channels growing most, alongside café/bistro. The more expensive full service restaurants keep losing visits (-0.5% vs. year-ago).

In this edition of Topline Top 3, we look at weekdays, young adults, dayparts, and families in the out-of-home (OOH) market.

As always, if you would like to discuss this information in greater detail, just contact your NPD account representative.

### TOTAL OUT-OF-HOME WEEKDAY TRAFFIC INCREASES

As unemployment falls and wage rises match inflation, traffic picks up among 18- to 24-year-olds. Weekday traffic sees growth for the first time in years.

Unemployment has dropped to 6.8 percent this quarter, and rises in weekly earnings (+1.7 percent) have finally caught up with inflation (+1.6 percent). As consumers go back to work and earn more money, they are more likely to treat themselves to a visit OOH.

Source : The Office for National Statistics — Labour Market Statistics / March 2014

**Total OOH — Weekday Traffic % Change vs. YA  
Year Ending March 2014**

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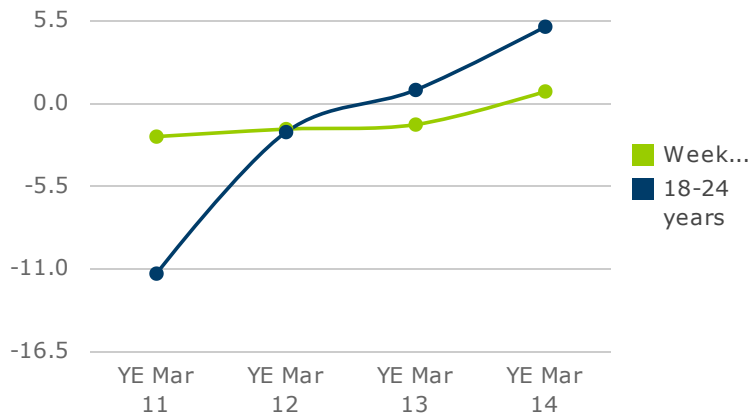
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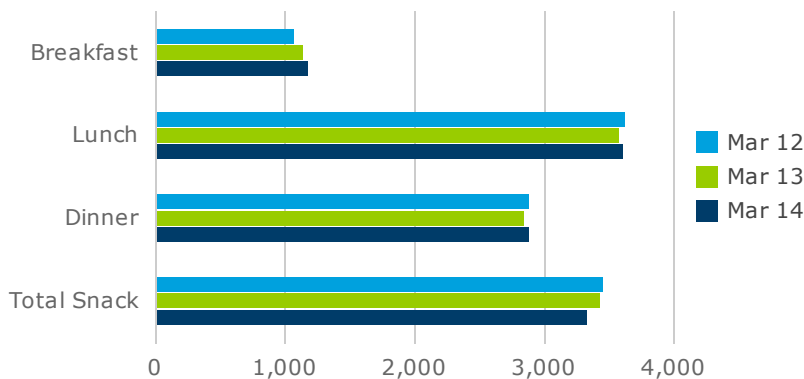
Source: The NPD Group/CREST®, YE Mar '14

### ALL CORE DAYPARTS IN GROWTH

Core dayparts breakfast, lunch, and dinner are all in growth this year as more confident consumers return to the OOH market.

As consumers feel more confident, they treat themselves to more meals OOH. This doesn't leave much room for snacking.

### Total OOH Daypart Traffic (millions) Year Ending March 2014



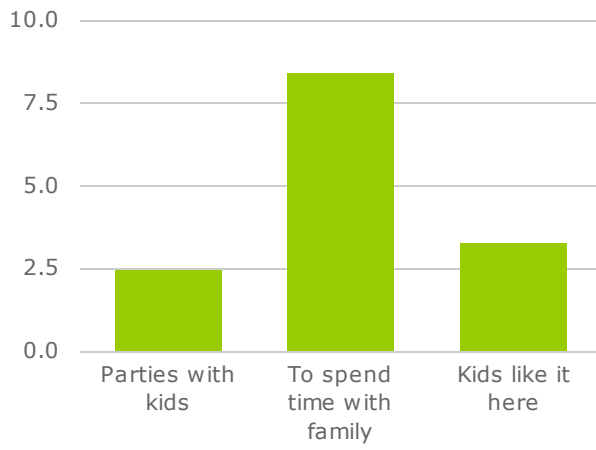
Source: The NPD Group/CREST®, YE Mar '14

### KIDS DRIVE GROWTH AT TOTAL OOH

Kids drove growth at total OOH this year, and they are becoming more powerful consumers as parents treat them for meals OOH.

Consumers were more motivated to spend time with family this year, and they were more likely to choose a restaurant based on what the kids like. Does your offer appeal to families? Could you benefit from "pester power"?

### Total OOH Meal Occasions % Change YE Mar 14 vs. YA Year Ending March 2014



Source: The NPD Group/CREST®, YE Mar '14

To learn more about The NPD Group's solutions for the foodservice market, click on the Contact Us button above or email us at [contactnpd@npd.com](mailto:contactnpd@npd.com).

