



FOODSERVICE
SOLUTIONS

TOGETHER LET'S

Build Back Better

SOCIAL MOMENTS ARE DRIVING *GROWTH*

SHORT TERM

SOCIAL OCCASIONS ARE MAKING THE STRONGEST RECOVERY
TREATING CONTINUES TO BE MOST IMPORTANT MOTIVATOR
DELIVERY CONTINUES TO GROW DESPITE RE-OPENING AND
LIFTING OF RESTRICTIONS



LONG TERM

RECOVERY IN THE MARKET IS EXPECTED TO BE LED BY
SOCIAL OCCASIONS. CONSUMERS EXPECT TO CONTINUE
TO WORK FROM HOME MORE THAN PRE-PANDEMIC.
SOCIAL DINNER OCCASIONS AND SOCIAL WEEKEND
BRUNCHES AND LUNCHESES ARE EXPECTED TO RECOVER
BETTER THAN WORK-RELATED/FUNCTIONAL OCCASIONS.

PUBS AND RESTAURANTS ARE BETTER SUITED TO
SOCIAL OCCASIONS.



WHAT DOES THAT MEAN FOR

MENUS?

OFFER DISHES

WITH 'CRAVEABILITY' AND ARE PERFECT
FOR TREATING.

FOCUS ON DISHES

THAT ARE GOOD FOR SHARING

VALUE FOR MONEY

IS KEY.

APPETISERS/SIDES

INCIDENCE IS GROWING AS A RESULT

TOGETHER WE CAN MOVE FROM RECOVERY TO GROWTH THROUGH MOMENTS OF SOCIAL EATING



Short term

Long term

Comfy Slippers

Phase 1

Sticking to tried and tested

Casual Boots

Phase 2

Move towards innovation

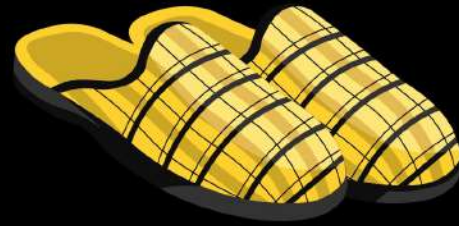
High heels

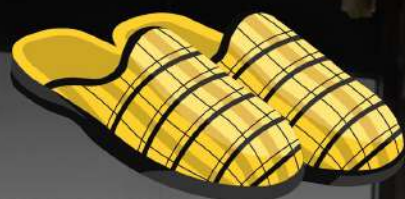
Phase 3

Desire for new experiences

Phase 1

FOCUS ON QUALITY



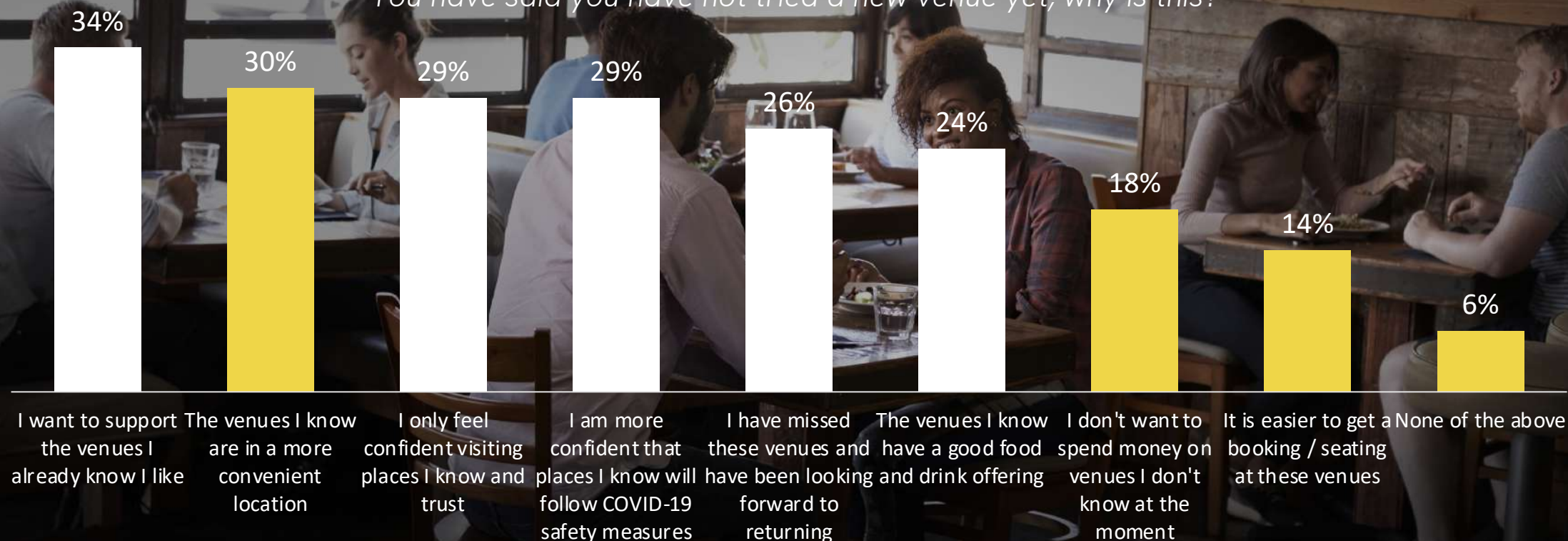


Phase 1

FOCUS ON QUALITY

CUSTOMERS ARE STILL PREDOMINANTLY VISITING OUTLETS OUT OF TRUST, CONFIDENCE AND LOYALTY

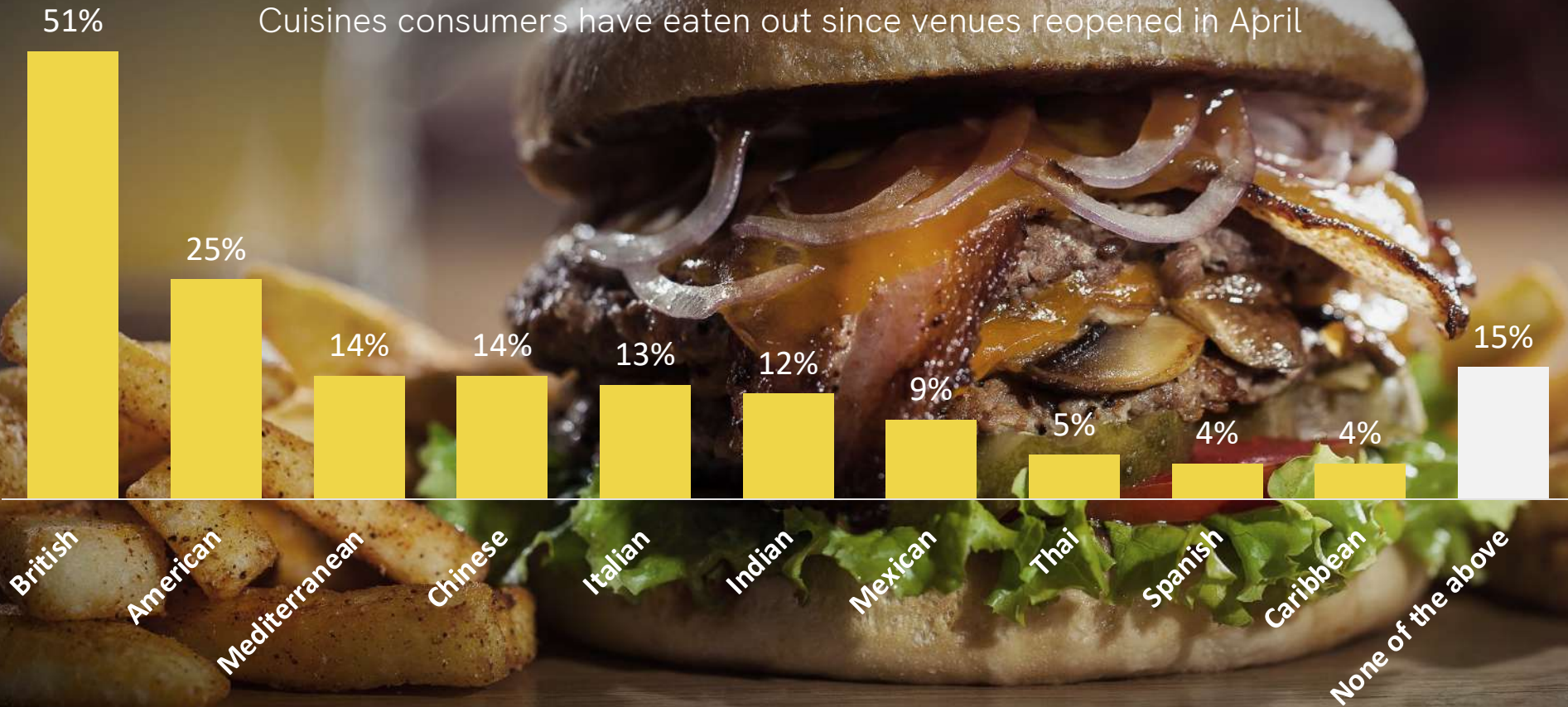
You have said you have not tried a new venue yet, why is this?





SINCE THE MARKET REOPENED, BRITISH CUISINE HAS BEEN THE MOST POPULAR CUISINE CHOICE FOR CONSUMERS, SHOWCASING THEIR DESIRE FOR TRADITIONAL MENU STAPLES

Cuisines consumers have eaten out since venues reopened in April



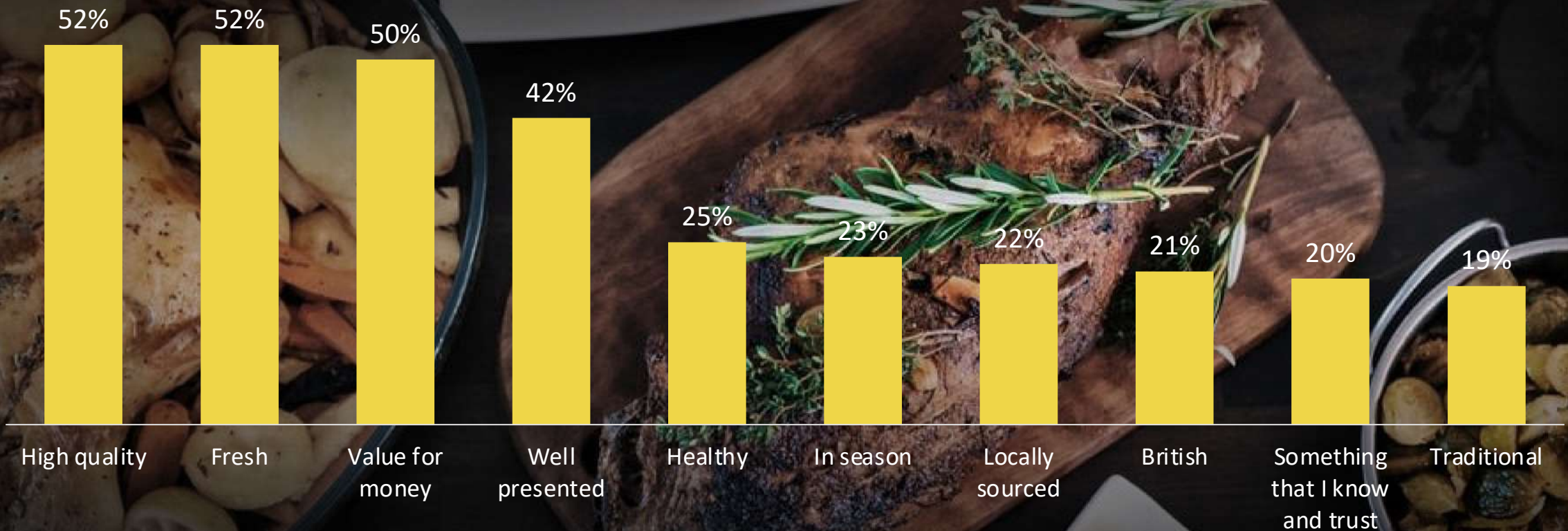
SHORTER MENUS
HAVE SEEN AN
INCREASING
DEMAND FOR
QUALITY. THE
AVERAGE NUMBER
OF DISHES ON
MENU DROPPED
FROM
28 TO 14
ON RE-OPENING





WITH SHORTER MENUS, QUALITY HAS PROVEN TO BE PARAMOUNT FOR CONSUMERS IN THE OUT OF HOME MARKET AND A CLEAR FOCUS FOR OPERATORS

"When choosing what to eat when I am out, it is important to me that the dishes served are..."



Phase 2

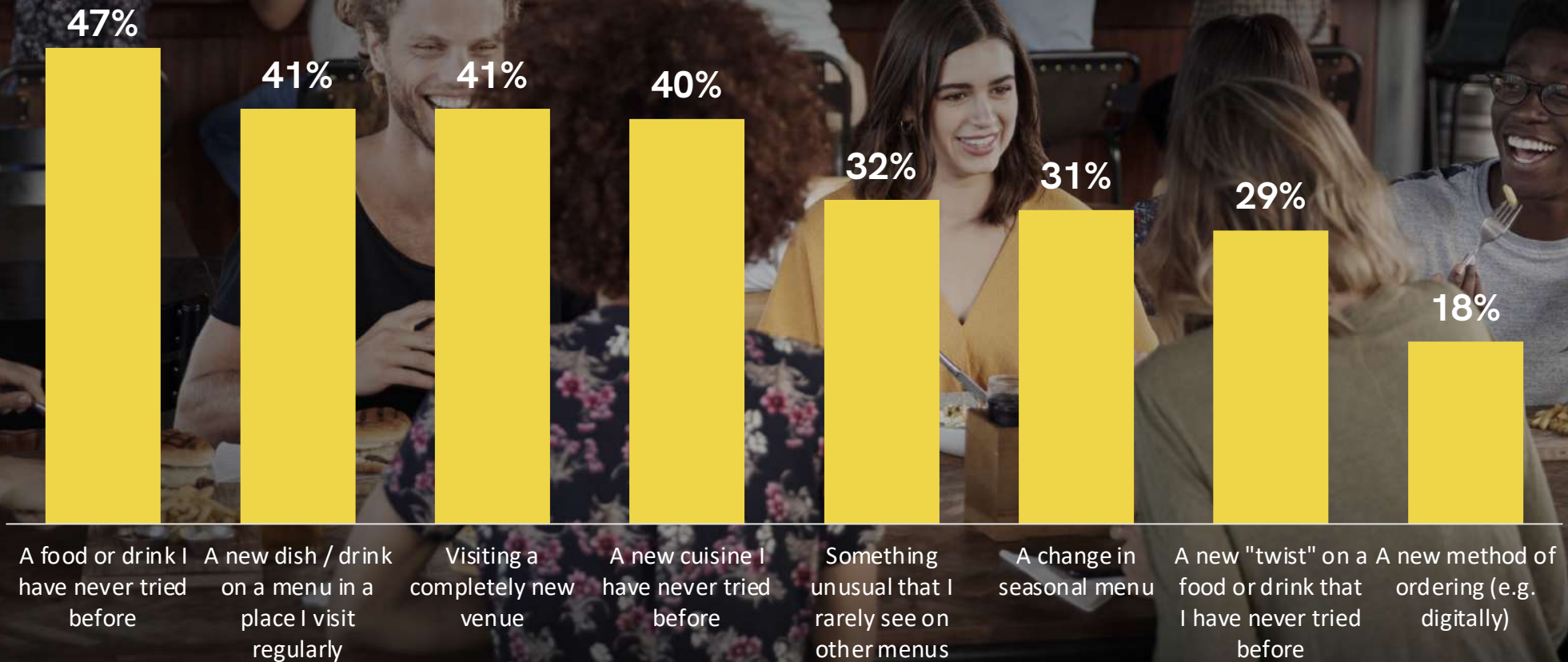
REVERTING TO INNOVATION



CONSUMERS EXPECT VENUES TO HAVE A MIX OF AND WELL LOVED MENU ITEMS

New

When thinking about eating and drinking out, what does "new" mean to you?



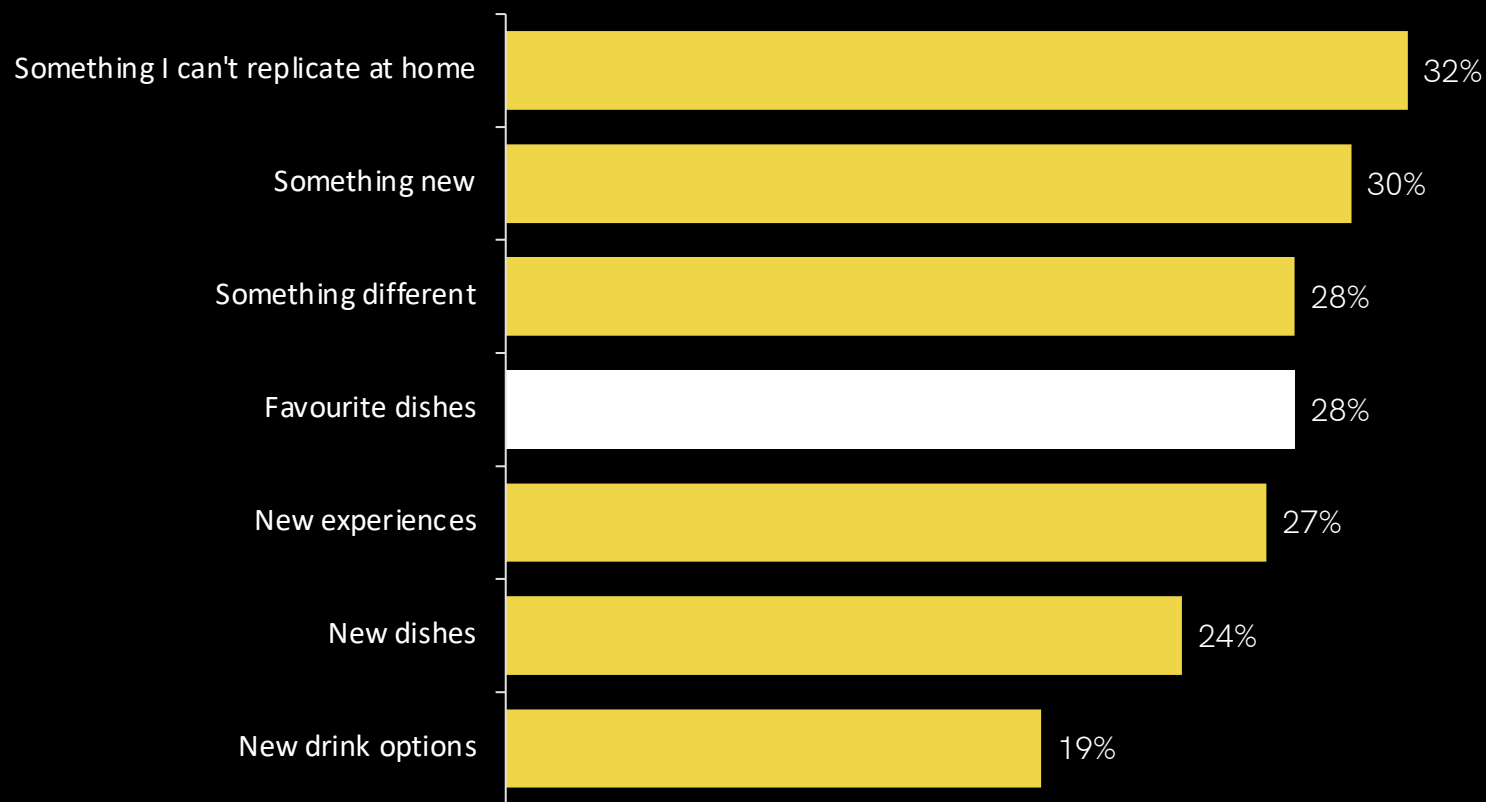


OFFERING NEW AND DIFFERENT WILL REMAIN A FOOTFALL DRIVER OOH AS WE MOVE INTO PHASE 2

Are any of the following important to you when *choosing where to go out*?

69%

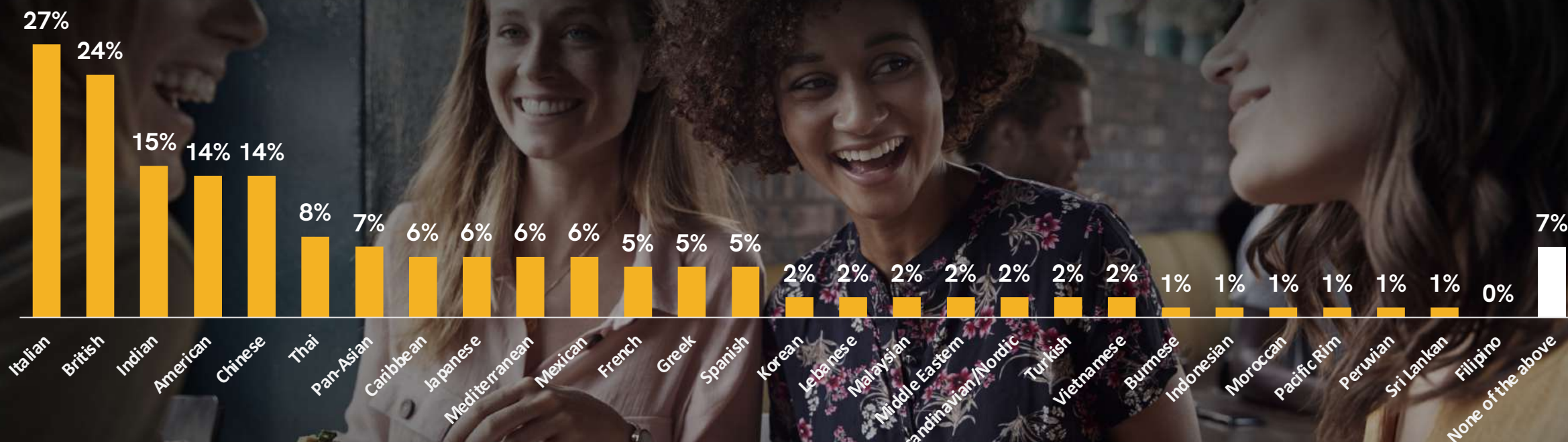
OF CONSUMERS AGREE
THAT "BEING ABLE TO
TRY NEW FOOD / DISHES
ENHANCES MY OVERALL
GOING OUT EXPERIENCE"



EXPERIMENTATION IS MAINLY BUILT FROM FAMILIARITY IN THE MAINSTREAM OUT OF HOME MARKET, WITH TRIAL MOST LIKELY FROM ESTABLISHED FAVOURITES

THE TRIED AND TESTED FORMATS SUCH AS FRIES ARE A SAFE BET
FOR EXPERIMENTATION AND ELEVATION OF THE EXPERIENCE

Out of the cuisines you typically eat out, which would you be most likely to experiment and try new foods with?

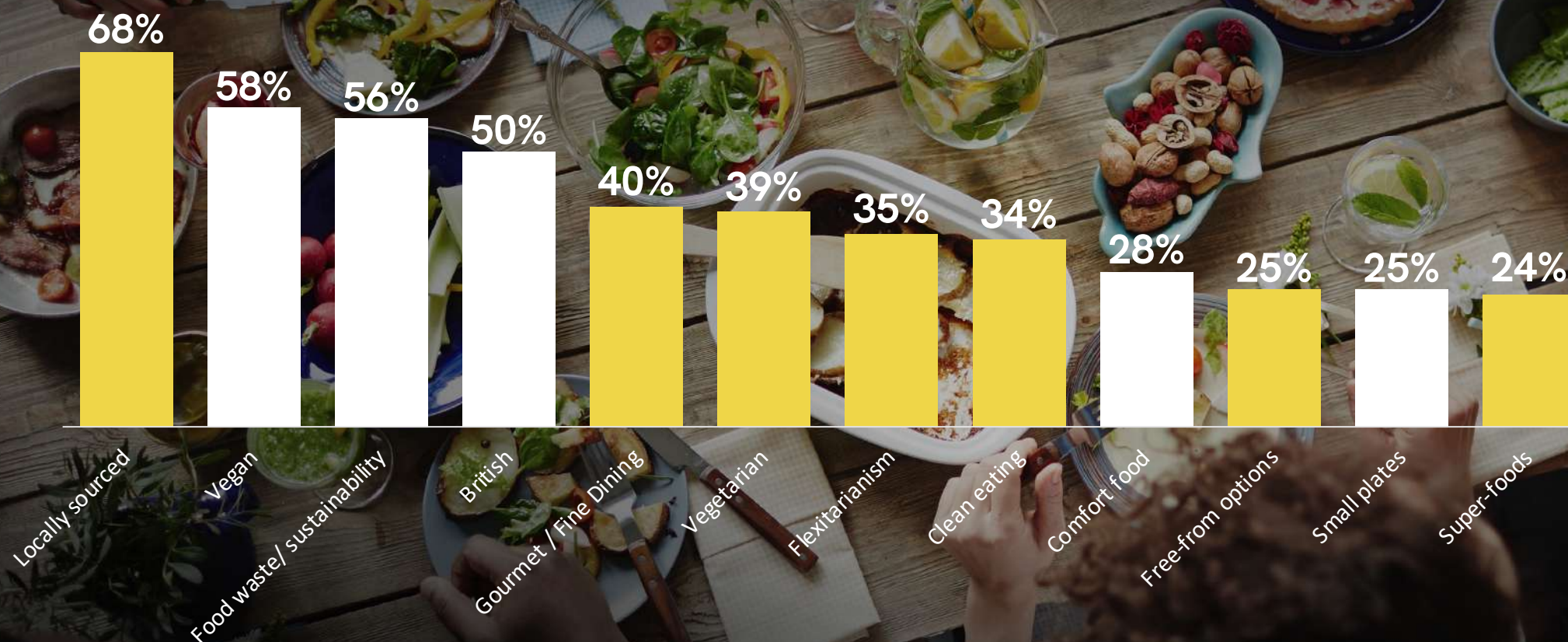


Phase 3

IMPLEMENTING INNOVATION TO WIN



IN ADDITION TO SUSTAINABILITY NEEDS, HEALTH AND DIETARY TRENDS ALSO DOMINATE IN TERMS OF LEADERS TIPS FOR 2021



"The vegan products that we've gone live with and since we opened in the gardens, have gone extremely well and we're now launching it in about every menu"

- GREENE KING



CONSUMERS WILL BE PLACING HIGHER DEMAND ON DISHES THAT ARE LOCALLY SOURCED, VEGAN FRIENDLY, INDULGENT, AND BRITISH

McCAIN FRIES AND SIDES ARE HITTING ALL THE MAIN CONSUMER DRIVERS



**HOWEVER WITH JUST A SMALL PROPORTION OF CONSUMERS
BEING VEGAN OR VEGETARIAN IT IS ABOUT CREATING
PLANT-BASED DISHES THAT APPEAL TO THE MASSES**



**WITHIN THE NAT.
REP SAMPLE
THERE WERE:**

5% - VEGAN

7% - VEGETARIAN

8% - FLEXITARIAN

**52% FIND
PLANT-BASED
DISHES ON MENUS
APPEALING**

**45% ARE
LIKELY TO
PURCHASE**

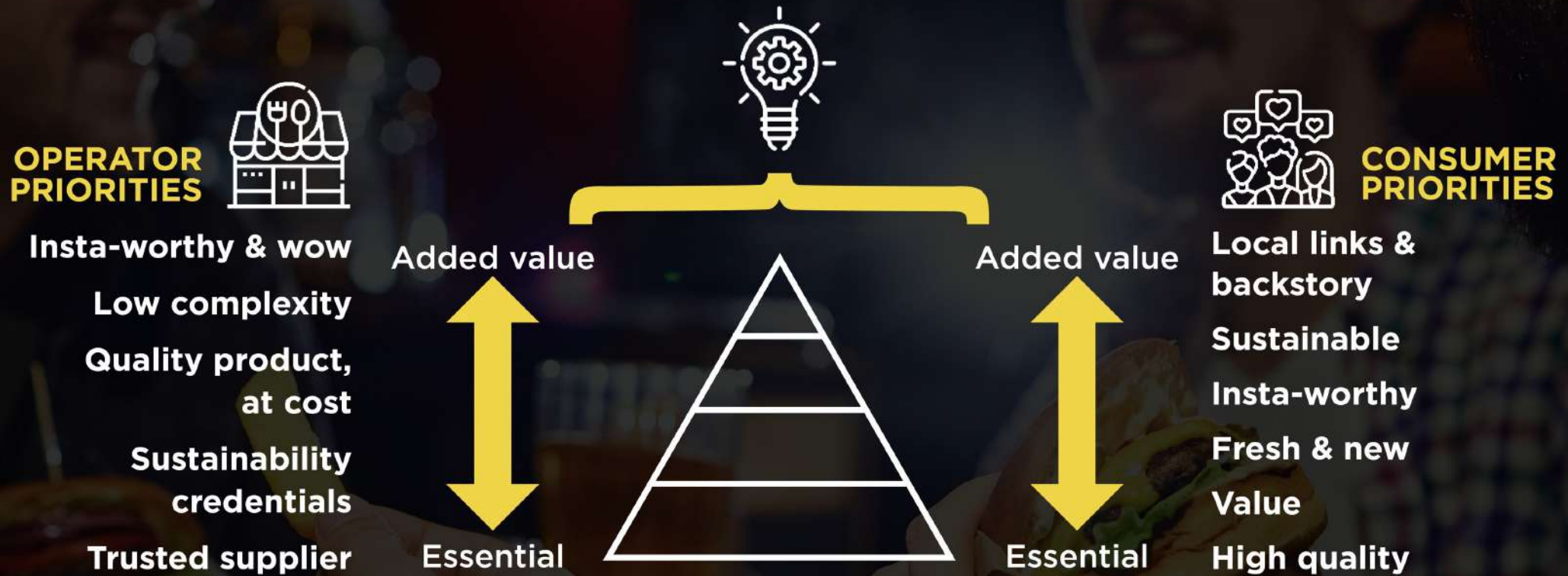
**79% OF THOSE
THAT FIND IT
APPEALING
ARE LIKELY TO
PURCHASE**



NEW EXPERIENCES REMAIN KEY TO ELEVATING CONSUMER EXPERIENCES OUT OF HOME

NEW FORMAT FRIES ARE A TRIED AND TESTED WAY TO INTRODUCE 'NEW' OPTIONS THAT ARE OPERATIONALLY LOW RISK

BUILDING BLOCKS FOR IMPLEMENTING NEW WITHIN FOOD



HOW CAN



FOODSERVICE
SOLUTIONS

SUPPORT?

McCAIN CAN OFFER QUALITY BRITISH PRODUCTS WITH A SECURE SUPPLY CHAIN AND OUTSTANDING SUSTAINABLE CREDENTIALS

THINKING ABOUT WHEN CHOOSING YOUR SUPPLIER FOR
FOOD PRODUCTS, HOW IMPORTANT ARE THE FOLLOWING?



QUALITY OF
PRODUCTS AVAILABLE

98%



TRUST IN
SUPPLIER

96%



END CONSUMER
EXPERIENCE

93%



ETHICAL
CREDENTIALS

73%



SUSTAINABILITY
CREDENTIALS

75%

57%

**OF BUSINESS LEADERS BELIEVE INNOVATION AND
NEW PRODUCTS ARE IMPORTANT WHEN CHOOSING
A SUPPLIER FOR FOOD PRODUCTS**

**THAT'S WHY WE OFFER UNRIVALLED INNOVATION,
INSPIRATION AND THE SECURITY OF SUPPLY CHAIN
TO ENSURE THE AVAILABILITY OF NEW PRODUCTS**

TOGETHER LET'S
Innovate



NEW

**INCREASED IN
IMPORTANCE**

Visits to outlet
to support

Passion for
the sector

Provision of tailored
insight as a bespoke
and exclusive value add

Proactive
support

**LEGISLATIVE UPDATES
(E.G. NATASHA'S LAW)**

**FLEXIBILITY IN
APPROACH**

Industry and product knowledge

Breadth of offering

**SUSTAINABILITY
& ETHICS**

**TRUSTED
PARTNERSHIPS**

FREQUENT COMMUNICATION

Understanding of aims and business objectives

**TRAINING
SUPPORT**

VALUE

Ease of
transaction / contact

**EASE OF
IMPLEMENTATION**

**QUALITY OF
OFFERING**

**ADDED
VALUE**

PRIORITY

NECESSITY

**MCCAIN PRIDE THEMSELVES ON
BEING PASSIONATE AS YOU ARE.
OUR PROACTIVE APPROACH
WILL HELP YOU INNOVATE
EVERY STEP OF THE WAY**

METHODOLOGY

A MULTI-METHOD APPROACH TO FULLY UNDERSTAND THE IMPORTANCE OF NEW IN THE OUT OF HOME MARKET, ENCOMPASSING MULTIPLE PHASES AND SOURCES OF RESEARCH, INCLUDING:



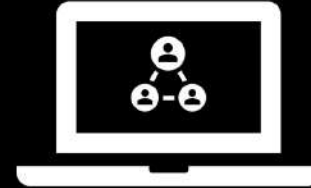
QUANTIFICATION OF OPERATOR DECISION MAKING

- Bespoke questions added to Business Confidence and Business Leader Surveys
 - 481 operator views undertaken in December, February, March and April



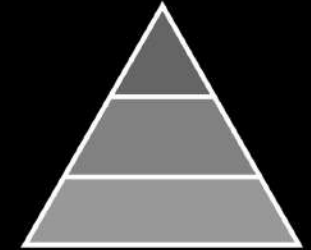
BESPOKE CONSUMER SURVEY TO UNDERSTAND OPINIONS ON NEW

- Quantification of consumer perspectives on the importance of new in the out of home market
 - 1,000 consumers surveyed in June about re-opening since April 2021



IN-DEPTH OPERATOR INTERVIEWS ON RE-OPENING

- Qualitative interviews with operators on re-opening to add an operator perspective on new
 - 6 in-depth, high level operator interviews



REDEFINING THE CONSUMER HIERARCHY OF NEEDS

- Through consumer and operator insight a renewed hierarchy of needs has been developed