Rebuilding of UK Foodservice & Hospitality 2021

with Roisin Keane, Bord Bia London &
Simon Stenning, FutureFoodservice

BORD BIA
IRISH FOOD BOARD

Thursday 22nd April 2021

House Keeping

- Agenda
- Questions welcomed – please submit via the questions box
- The deck will be circulated in a follow-up email

Lockdown Easement Roadmap

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NEWS

Home | Coronavirus | Brexit | UK | World | Business | Politics | Tech | Science | Health | Family & Education

UK | England | N. Ireland | Scotland | Alba | Wales | Cymru | Local News

Covid lockdown eases: Celebrations as pub gardens and shops reopen

12 April | Comments

Coronavirus pandemic

Step 2: April 12th

Hospitality venues can serve people outdoors only. There will be no need for customers to order a substantial meal with alcohol, and no curfew - although customers must order, eat and drink while seated.

Step 3: May 17th

Indoor hospitality, entertainment venues such as cinemas, the rest of the accommodation sector, will also reopen.

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THE FUTURE OF FOODSERVICE

2021 to 2025
The Rebuilding of Hospitality

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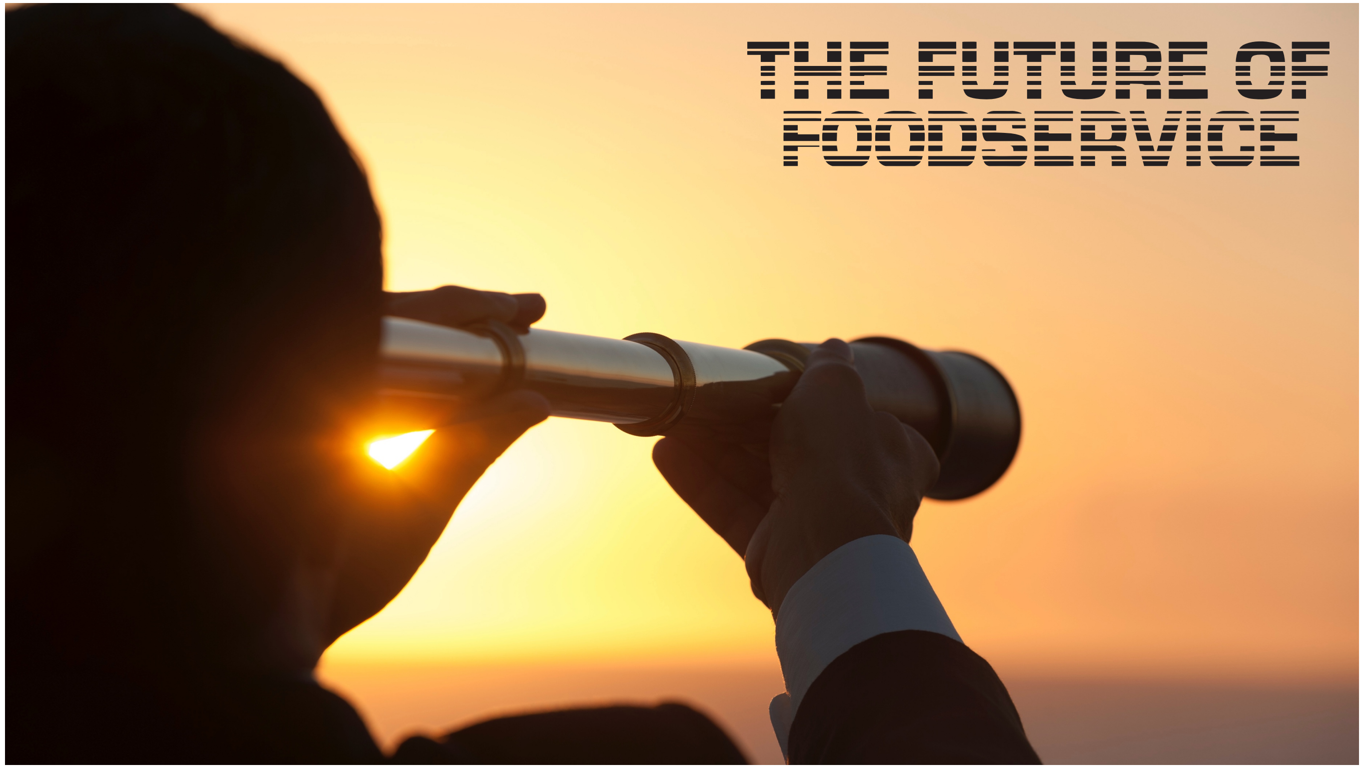
Simon Stenning
Strategic Advice for Foodservice

www.FutureFoodservice.com



2021 to 2025
The Rebuilding of Hospitality

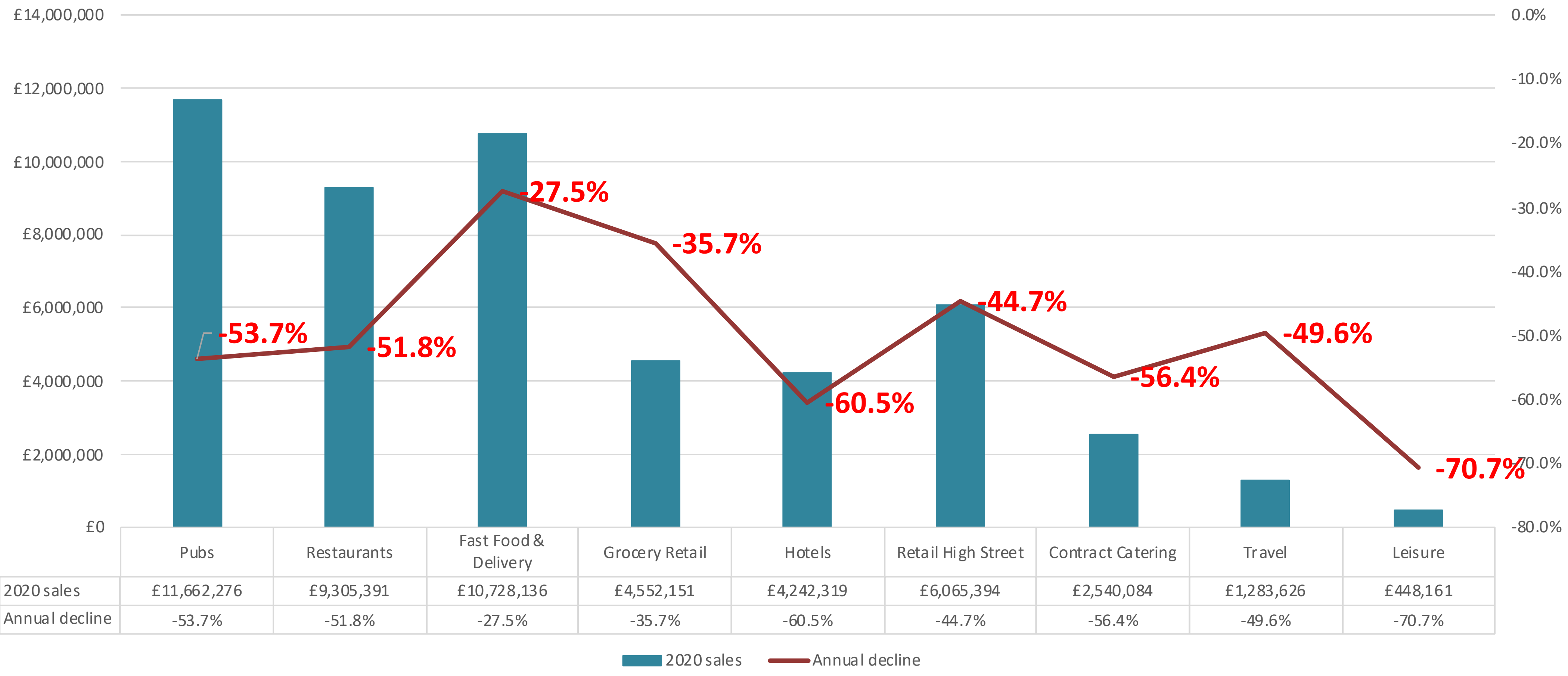
- Why it will be different
- What will be different
- Forecasts for the next 5 years

UK Foodservice will have lost £124.4 Bn from 2020 to 2025 as a result of Covid

It will be different……

2020 calculated sales by channel

Estimated annual 2020 sales by Foodservice channel with annual decline from 2019



	Pubs	Restaurants	Fast Food & Delivery	Grocery Retail	Hotels	Retail High Street	Contract Catering	Travel	Leisure
2020 sales	£11,662,276	£9,305,391	£10,728,136	£4,552,151	£4,242,319	£6,065,394	£2,540,084	£1,283,626	£448,161
Annual decline	-53.7%	-51.8%	-27.5%	-35.7%	-60.5%	-44.7%	-56.4%	-49.6%	-70.7%

Source: FutureFoodservice analysis

2020 – a year of change & challenges

SOHO
SUMMER
STREET
FESTIVAL.

Branded Restaurant Chains – a decline of 21% in 2HY 2020

	No. of Outlets			
Brand	**Jan-19**	**Mid 2020**	**Dec-20**	**Notes**
Nando's	415	422	439	Took opportunity to pick up some new stores from other closed estates
PizzaExpress (UK)	459*	454*	350*	350 at start of 2021, 217 for delivery and/or collection, with 133 closed. *Plus 19 stores in Ireland
Pizza Hut Restaurants	262	253	215	CVA process closed 29 stores. Further site closures could be seen in 2021
Prezzo	275	185	180	New ownership expects the majority of 180 sites to remain open
Wagamama	132	146	149	Plus 5 delivery only kitchens. Some sites rebranded from other TRG brands
Zizzi	155	161	129	Sold in a pre-pack administration of Azzurri Group, which saw 78 sites close (across 3 brands)
Miller & Carter	100	114	120	Was expanding slowly, which we expect to commence again in 2021
Frankie & Benny's	240	220	108	Closed c.110 sites as part of the TRG restructuring
Côte	95	98	94	Sold in pre-pack administration with closure of 4 sites
T.G.I. Friday's	85	87	87	Recent new mgmt team looking for strategic acquisitions of new sites, with c.5 per year stated ambition
Bill's	80	78	78	Well backed by Richard Caring. 4 sites temporarily closed, which may be permanent
Bella Italia	97	112	78	Went through sale process as part of creation of new Big Table Group
ASK Italian	114	111	65	Closed c.40 sites through admin & sale process and creation of Big Table
Franco Manca	51	52	53	Well established and with low levels of debt. Expect to pick up more sites that come onto the market
Wildwood	49	51	49	Plus 5 Dim T restaurants
Las Iguanas	60	56	43	Lost a few sites in the CDG - Big Table restructure. A growth brand so expect increase in site numbers.
Honest Burgers	32	42	43	Plus editions sites
Turtle Bay	45	42	42	Well backed by Piper, so stable
YO! Sushi	72	70	40	CVA process closed 19 stores plus 9 others sub-let
Giggling Squid	30	35	38	Slowly expanding
Gourmet Burger Kitchen	100	62	35	26 sites closed as part of administration, acquired by Boparan
Café Rouge	77	62	30	Including 5 sites in Center Parcs. Part of The Big Table Group
Pho	15	30	30	Slowly expanding
Piccolino / Gino / Bar & Grill	30	36	28	Pre-pack administration secured 28 sites. 8 Gino D'Acampo sites also owned by new Group
Carluccio's	110	29	26	Reduced from 110 to 70 in 2018 CVA. Closed 41 in sale to Boparan in April 2020
Ego Restaurants	17	20	22	Expanding in partnership with M&B, converting older pub formats.
Rosa's Thai	10	19	22	On a slow and steady expansion trail, so expect further growth
Comptoir Libanais	24	23	21	Plus 3 airport sites run by TRG; these will possibly return to be run directly
Chiquito	72	80	19	TRG put Chiquito into administration but bought back 20 out of the 80. some only operating as delivery
Byron	77	51	19	Plus 5 delivery only kitchens. Reduced in administration and restructure. Set for growth, tried to buy GBK
The Real Greek	17	18	19	Part of Fulham Shore (Franco Manca). Slow expansion but exposed to central London
Bistrot Pierre	25	25	19	Pre-pack administration saw 6 sites close
Giraffe World Kitchen	43	20	17	This number includes 8 sites in UK airports run by TRG concessions
Wahaca	23	25	13	CVA process closed 11 sites. Invested in by Nando's backers
Top 40 - TOTAL	**3499**	**3361**	**2759**	

This list does not include brands that have completely closed, eg Jamie's Italian, Chimichanga, Handmade Burger Co.

R.I.P. – Hospitality sites that were lost to Covid-19

ANDINA
PERUVIAN KITCHEN

BLACKHOUSE

Darjeeling Express

HIX

THE GREENHOUSE

indian accent

Le Caprice

THE LEDBURY

Café de Paris

SARDINE

SEAFOOD PUB COMPANY

STREET XO

2021 – The Rebuilding of Hospitality

Positive drivers for Hospitality:

- A Consumer, starved of consumption and fuelled by savings, wanting to splash out once restrictions are lifted.
- An Economy, less scarred than expected.
- Wage costs kept from rising higher by the higher unemployment numbers.
- Household savings, with increased levels from 2020, being released/spent in 2021.
- VAT reduced to 5% from 20%, without menu prices falling, gives a significant revenue boost.
- Reduction in VAT reduces pressure on operators to increase menu prices, therefore remaining more appealing to consumers.
- Longer-term trends towards more leisure activities are a strong driver for Hospitality.

Negative drags on Hospitality:

- Lockdown & restrictions carrying on until the summer, preventing consumers from eating and drinking out.
- Unemployment rising to c.8%, reducing consumer confidence and impacting disposable incomes.
- Younger consumers being more affected by unemployment, curtailing their participation.
- Caution from an older population still being exhibited until the majority are vaccinated (with the full dosage regime).
- Consumer confidence in the economy and their own livelihoods remaining in negative territory, curtailing exuberance.
- Inflation rising to c.2% pushing prices up at a time when wage growth could be stagnating due to higher unemployment.
- Potential Government tax rises to claw back on Covid-related debt.

Simon Stenning © 2021

Economic Impacts – Hospitality will rely on Government support in 2021

VAT	POSITIVE – If the Government extends the ...ent VAT cut from April, keeping it at 5% for Hospitality food, soft/hot drinks, and accommodation costs (alco... ...ded and is still at 20%), then businesses benefit significantly. NEGATIVE – if the Gov't returns VAT bac... ...% for Hospitality, there will be a significant drop in revenue for operators who would be forced to increase prices, putting pressure on inflation and consumer spending.
INFLATION	POSITIVE - If inflation stays at low levels, then consumers have more disposable income and the Bank of England can retain interest rates at low levels (which mea...s the Government has less pressure to repay debt. NEGATIVE – if inflation rises, pressure is ... both consumers and the Bank of England, which could lead to an increase in interest rates and a decrease in disposable spending.
BUSINESS RATES	POSITIVE – If the Gov't extends the Busines... Rates holiday through the 2021/22 tax year, this will provide a strong positive boost for Hospitality, where busin... rates can account for c.5% of all business costs. NEGATIVE – If Business Rates are re-int... ...with no discounts or reliefs, then operators will have these costs to deal with, which could force an increase in menu pricing and potentially force more sites to close.
UNEMPLOYMENT	POSITIVE – with the Furlough scheme exten...ded to the end of April, many jobs are protected that might have been lost. Optimism remains that business will re...over in the spring and reduce the impact of unemployment NEGATIVE –If more jobs are lost after t... ...n scheme ends, then greater impacts will be felt on Hospitality, reliant on disposable income. Impacts from job losses in 2020 have not fed through, but Q1 2021 will be tough.

Sector Specific Impact Factors for 2021

In order to derive the forecasts for each sector within the industry, the following impact factors have been applied using a RAG system – High, Medium or Low impacts.
These factors are not exhaustive but provide an idea of the ways in which differing sectors were to be affected through the lockdowns and from changing situations and consumer behaviours.

CONSUMER DEMAND

- A significant concern through 2020, as worried consumers stayed at home, this is still expected to be a concern in 2021 until vaccines are fully distributed
- Will consumers be returning to previous behaviours and habits?
- Have consumers got used to cooking at home, either from grocery deliveries or from meal kits?
- Will demand for socializing and the experiential return?
- Is there a propensity to spend? Or has it changed significantly?
- Have expectations changed?

PROFITABILITY

- Will the same number of outlets in each sector, be open? How many will have closed permanently?
- Are there significant rent arrears, or carried debt, that affect ongoing operations?
- Can business be operated profitably at reduced levels of trade?
- Will the VAT reduction benefit in the short term, but affect significantly if it changes back?
- Will food costs be increasing? Will Labour costs be increasing?
- Are property costs reduced?

ECONOMY

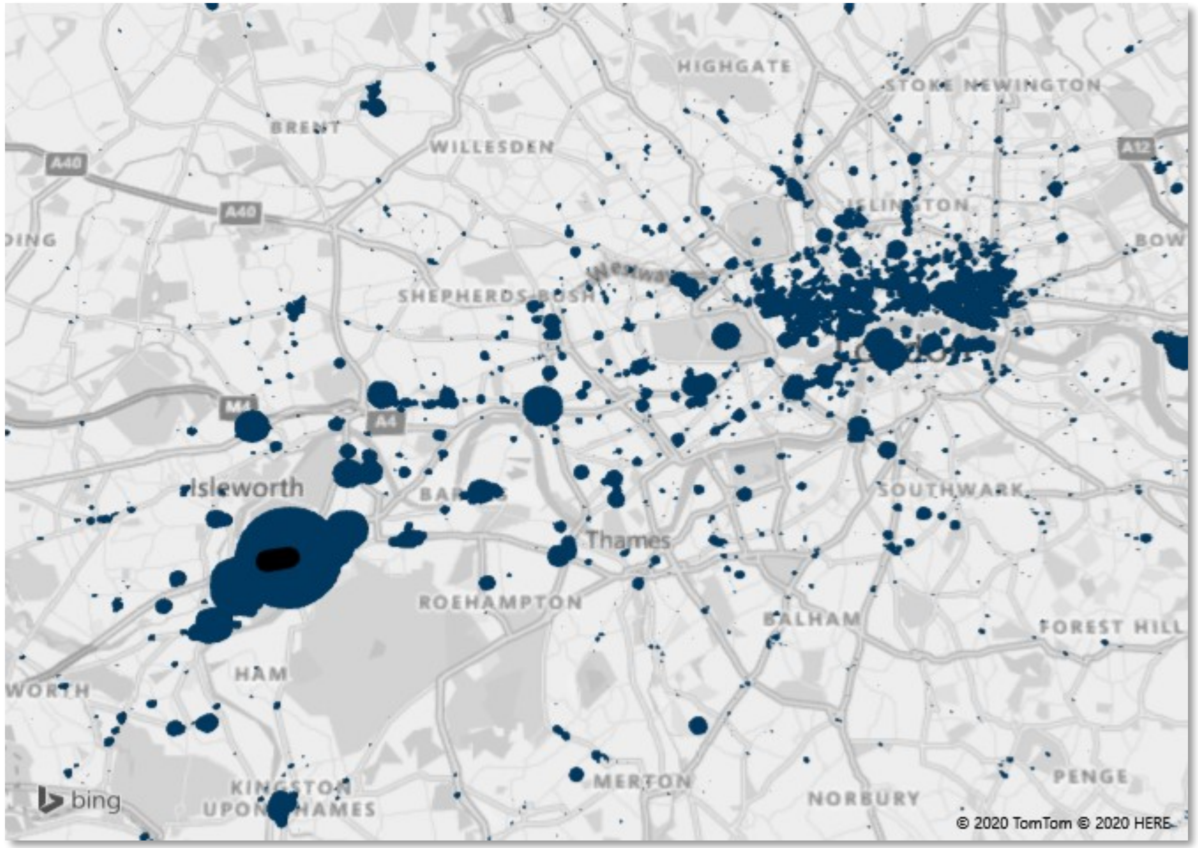
- Will the target customer base be affected by unemployment?
- Or will the customer base be affected by income reduction?
- Will there be a decrease in investment and credit available?
- Will inflation or Brexit drive up input costs?
- Will reduced inbound tourism affect the business?
- What effects will potential increased taxation make?
- Will the Govt. increase support measures for the sector?
- Will consumer confidence grow?

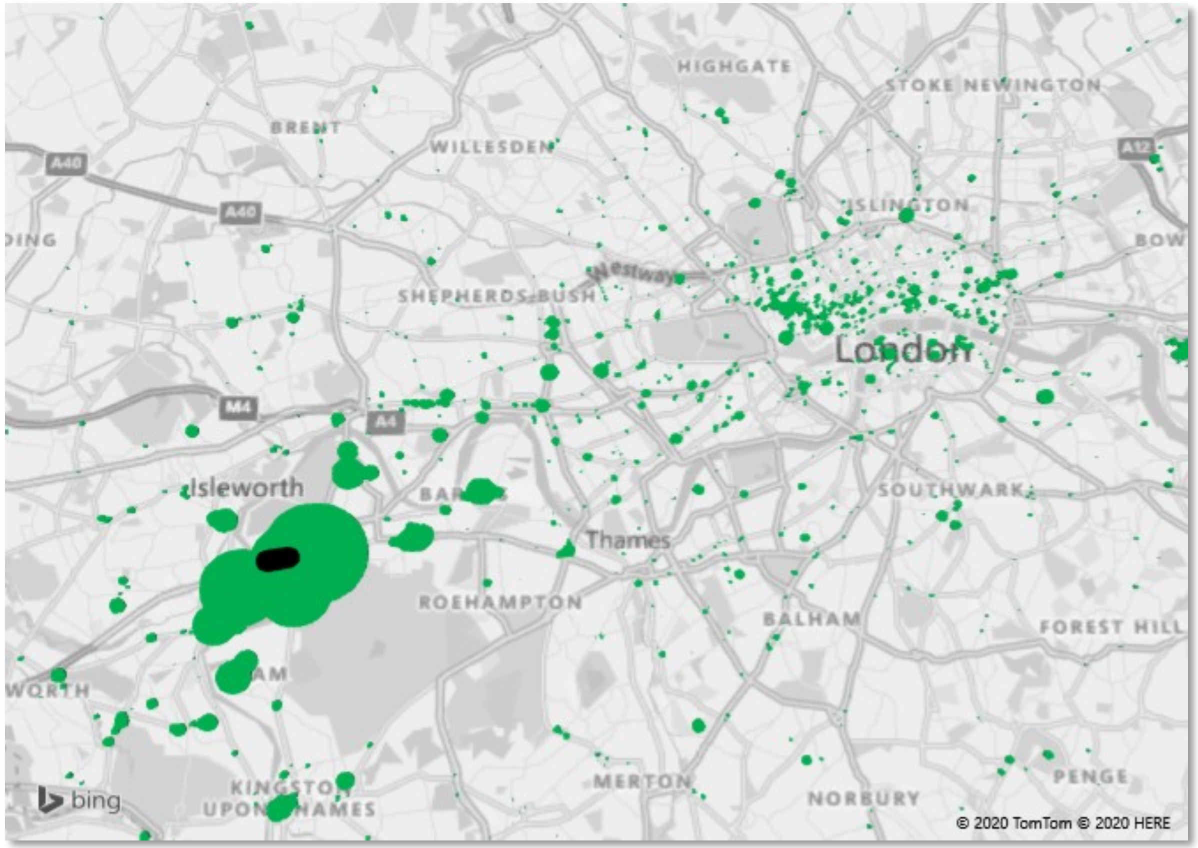
LOCATION

- Will there be less footfall / usage of the area/facilities?
- Is the business leasehold or freehold?
- Does the property have outdoor space that can be utilized?
- Will footfall return to city centres as workers return to offices?
- Will the sector benefit from staycations, or lose out with reduced inbound tourism?
- Are businesses located in suburban locations to benefit from more WFH?
- Can businesses benefit from local communities?

Locational Impacts

Impact Factors – Loss of City Centre Trade





PRE-COVID - residents of Richmond made 35% of all their spend at Coffee/Sandwich retailers within Zone 1 of London
(Source: HDI)

Since APRIL 2020 - residents of Richmond only make 10% of all their spend at Coffee/Sandwich retailers within Zone 1
(Source: HDI)

Nationwide gives 13,000 staff complete control over place of work

HSBC to slash post-Covid office space by 40% as profits drop by a third

NEWS Home › Business › Business Operations

Google to lease more UK office space despite remote working

The tech giant reportedly planning to lease an additional 70,000 square feet of office space in London's Kings Cross

Impact Factors – Working From Home vs Offices

Has Goldman's DJ just pulled the plug on WFH?

Solomon, who took over from Lloyd Blankfein in October 2018, said that working from home (WFH), which has become the norm for billions of white-collar workers, was a "temporary thing". "I do think an innovative, collaborative, apprenticeship culture it's not a new normal," he told a virtual conference

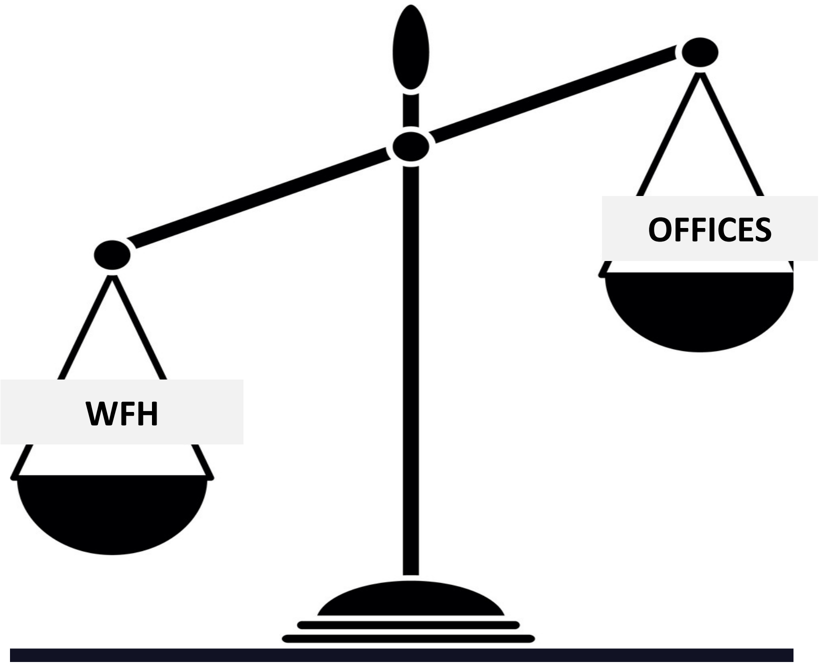
"It's an aberration that we're going to correct as qui

Google and Amazon call staff back to the office

Staff at Google will need permission to work from home for more than two weeks a year and Amazon plans to restore an "office-centric culture" as employers prepare for the end of the pandemic.

Impact Factors – Working From Home vs Offices

We forecast that there will be a slow return to offices, but levels will not rise back completely through 2021.



- We forecast that the majority of the c.12million office workers will remain working from home for the greater proportion of their working week, for the first half of 2021, in line with Q1 lockdown requirements and despite the greater advantages of team-working in offices.
- There will be a gradual return to offices, but a retained split of c.2/5ths being spent working from home.
- Long-term business growth will not be dampened and city centres will return to pre-pandemic levels of usage in a 3-5 yr time frame.

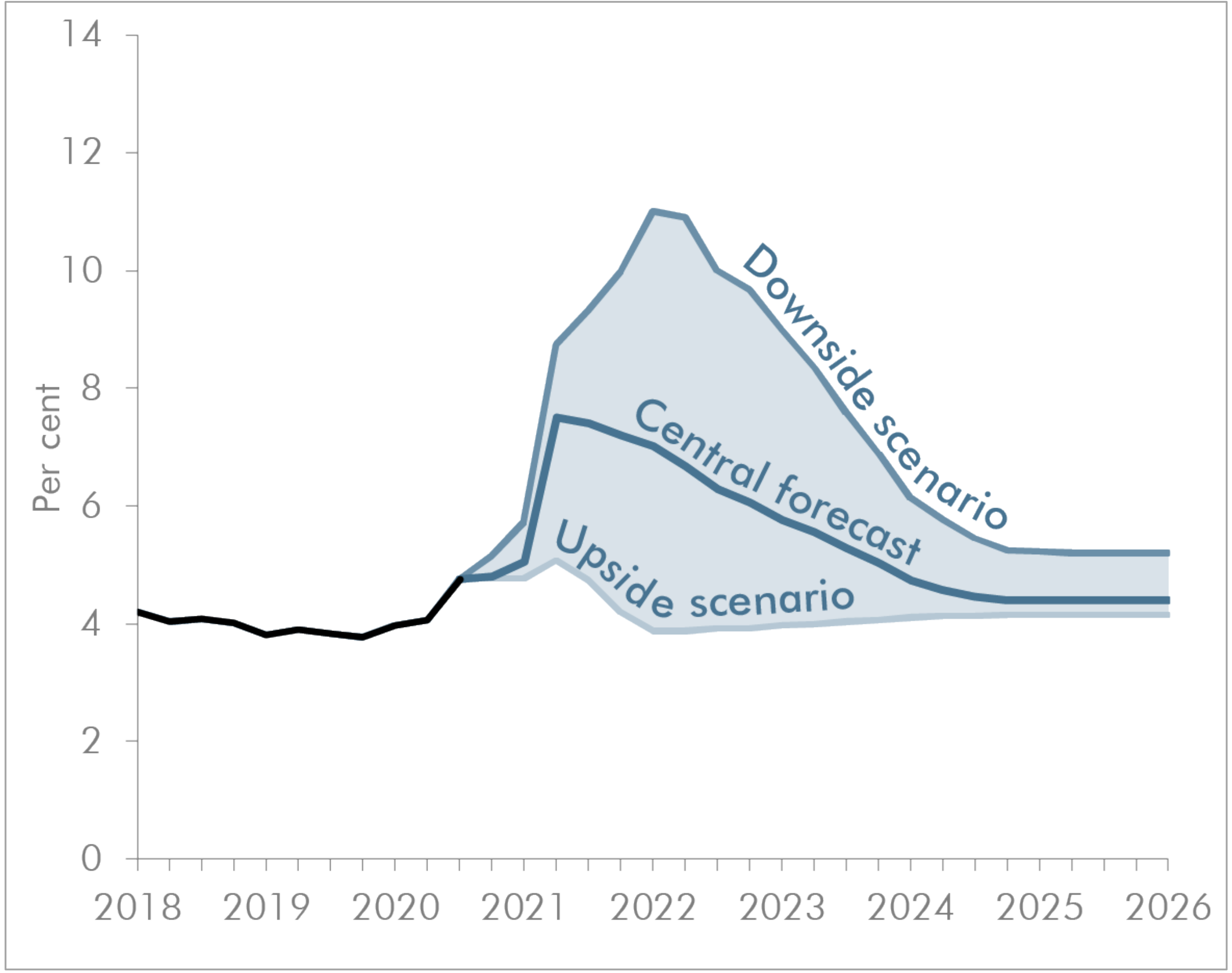
IMPACT FACTORS - Reduction in Inbound Tourism & Switch to Domestic

Visit Britain estimated a 76% decline in Inbound Tourism to the UK in 2020, to 9.7m

Visit Britain forecast an improvement in visits in 2021, to 16.9m
Still -59% on 2019 levels

Source: visitbritain.org

Impact Factors – Rising Unemployment



UK Unemployment rose by - +782,000

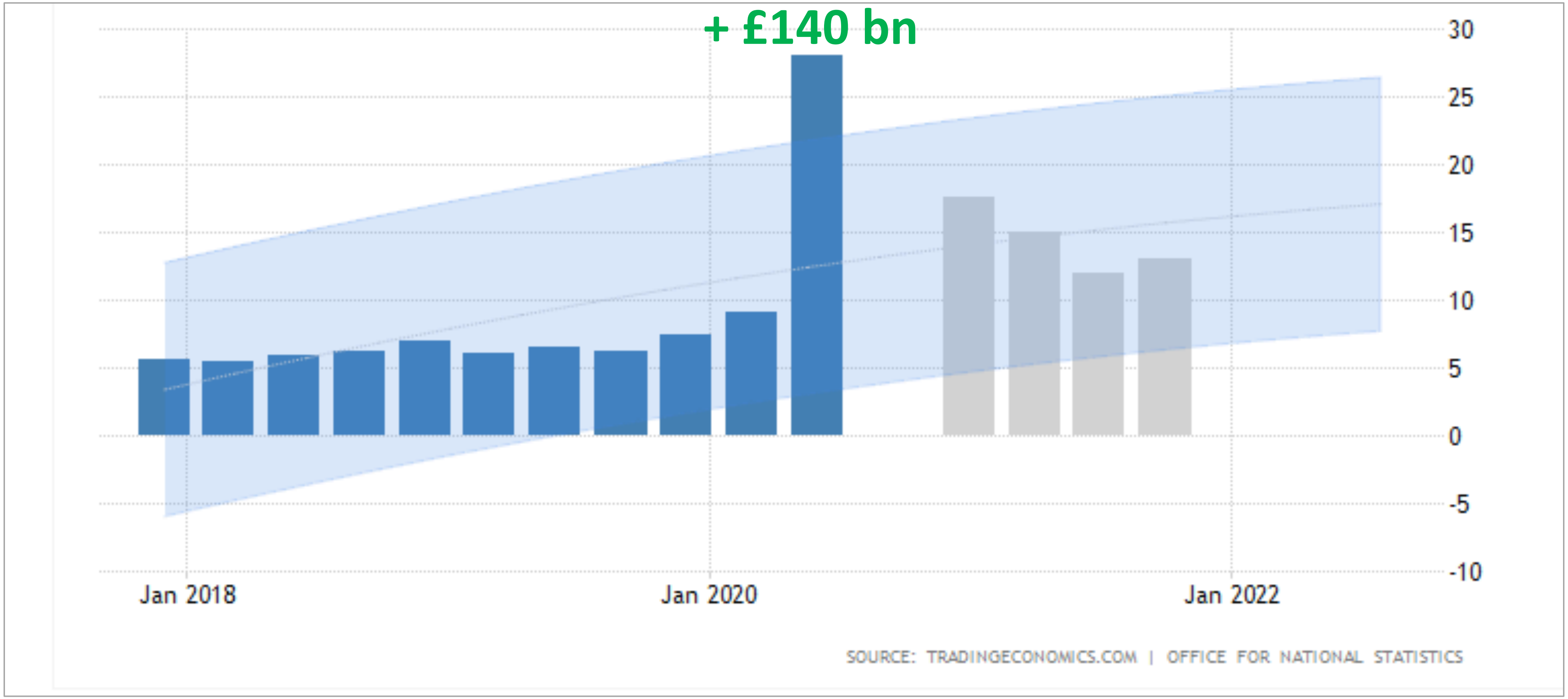
reaching 5.1%
in the year to end Dec 20

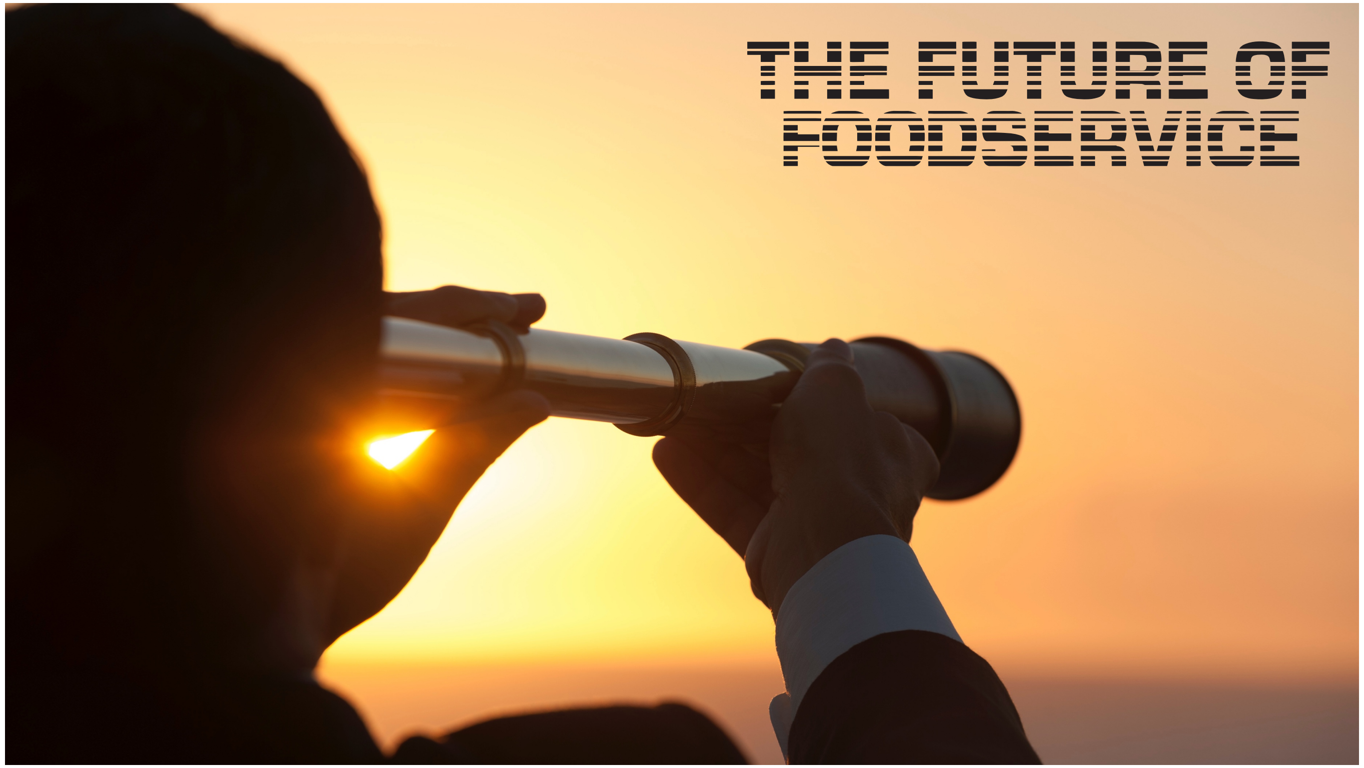
Younger demographics affected more –
18-24 yr old's
13.6% economically inactive
An increase from 10.7%

The OBR forecasts a rise to 6.5% in its central scenario, with potential to rise to 10% in a downside scenario

Source: OBR.uk

Impact Factors – Consumer Spending





2021 to 2025
The Rebuilding of Hospitality

- Why it will be different
- What will be different
- Forecasts for the next 5 years

Branded Restaurant Chains – a decline of 21% in 2HY 2020

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YO! Sushi	
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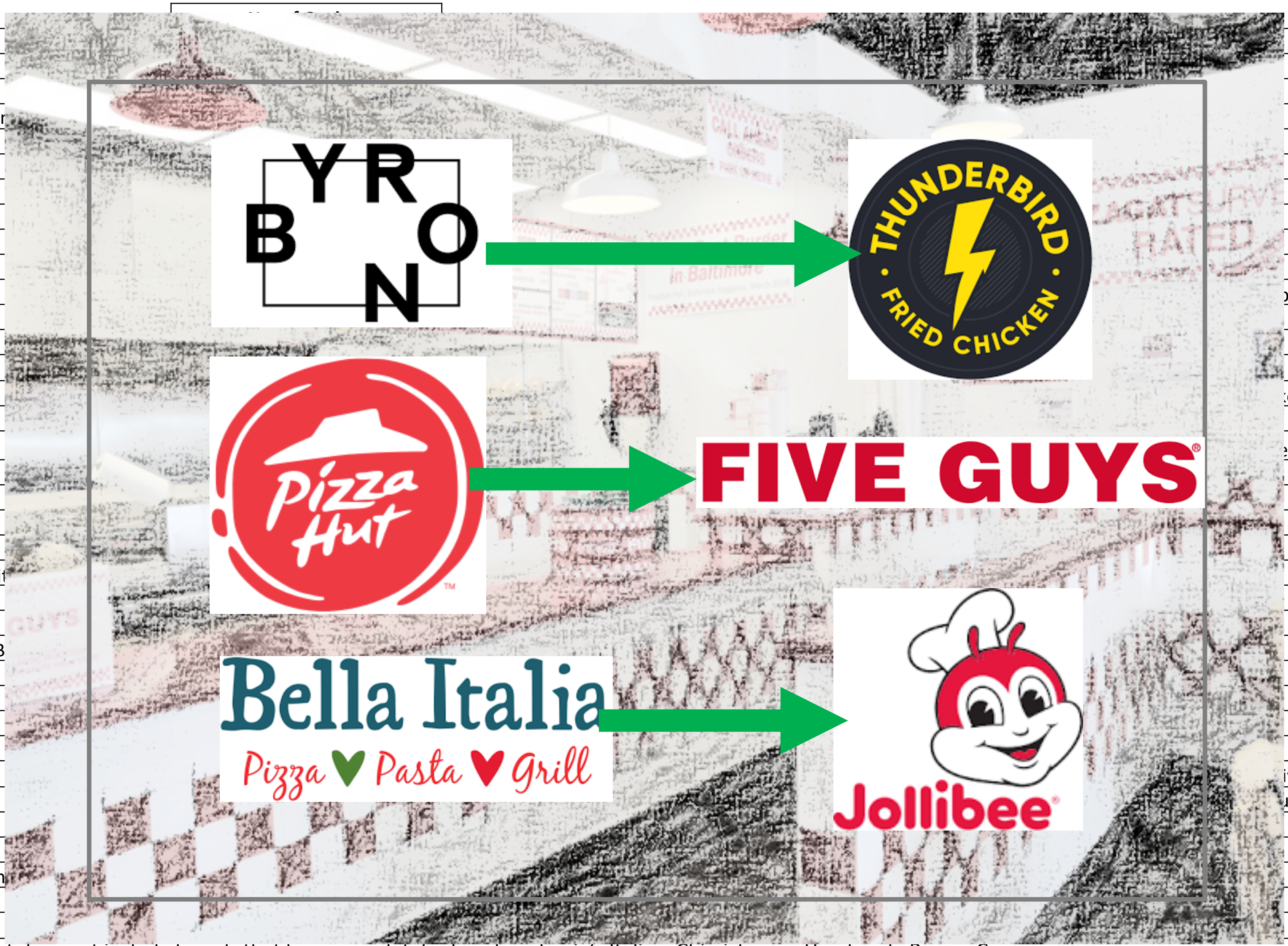
Café Rouge	
Pho	
Piccolino / Gino / B	
Carluccio's	
Ego Restaurants	
Rosa's Thai	
Comptoir Libanais	
Chiquito	ivery
Byron	y GBK
The Real Greek	
Bistrot Pierre	
Giraffe World Kitch	
Wahaca	



This list does not include brands that have completely closed, eg Jamie´s Italian, Chimichanga, Handmade Burger Co.

A Faster Pace of Life – new formats for Hospitality

- Above Left: Carluccio's new restaurant format in Richmond, London
- Above Centre: conversion of a Carluccio's site in central London into a Slim Chickens fast food/social refuelling format
- Right: new development by @Pizza to provide walk-up and drive-thru hot pizzas cooked in 90 seconds

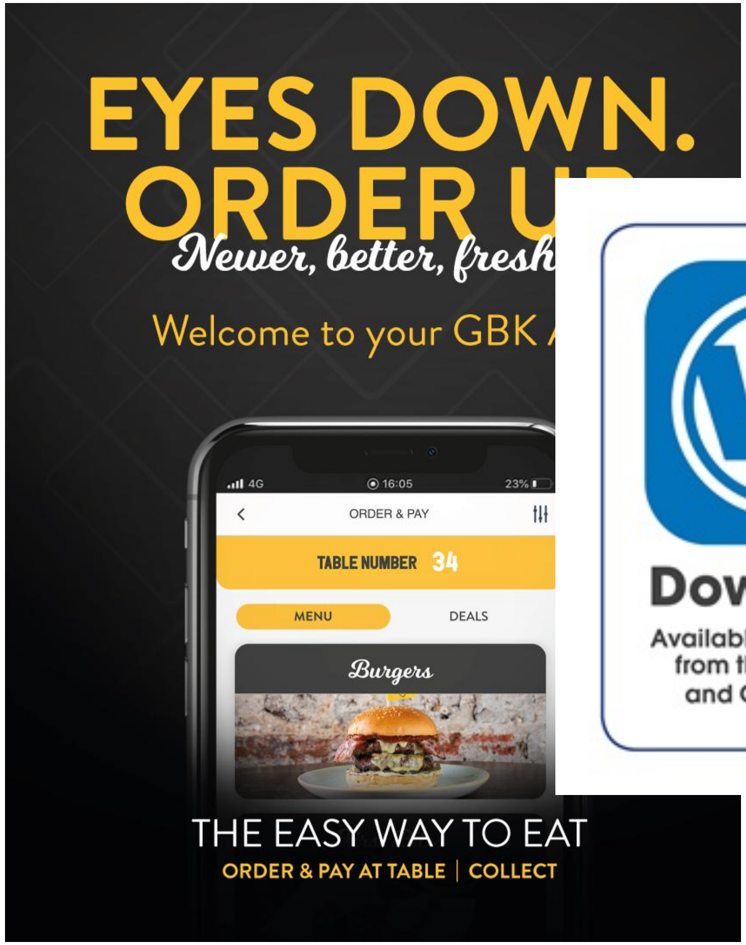
Fast Food – Winning Developments

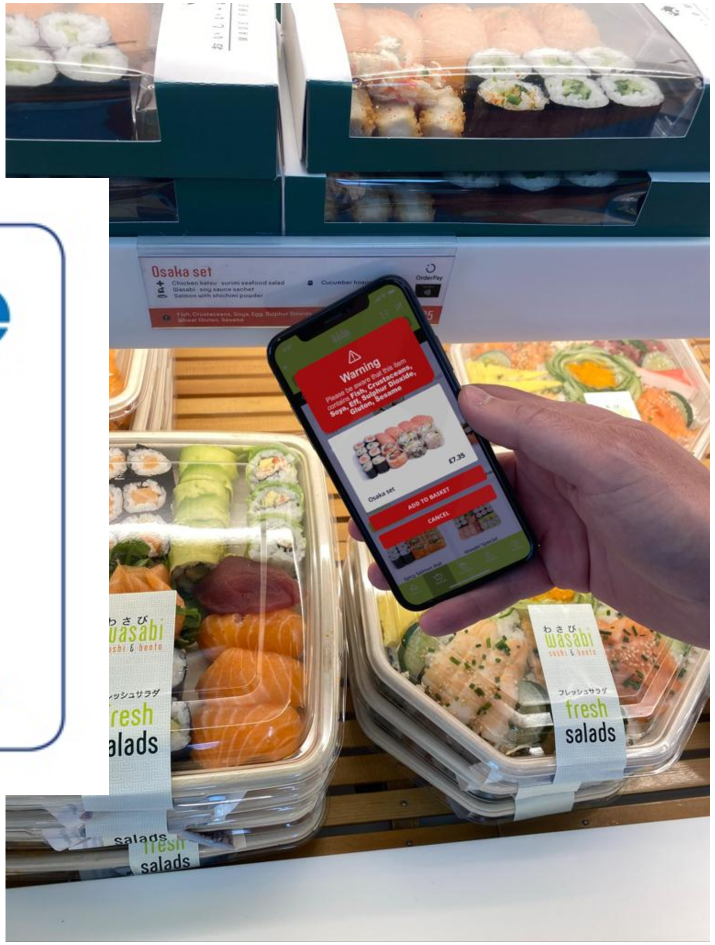
Bring true personalization from vision to reality

Good morning,

Knowing you're from United Kingdom, the weather is clear and cool today, you're on an Apple Computer, and you've arrived to this page through a Google Organic Search are just a few examples of how Dynamic Yield can help you tailor personalized experiences based on any data you own — across web, apps, and email.

A Paradigm Shift to Technology





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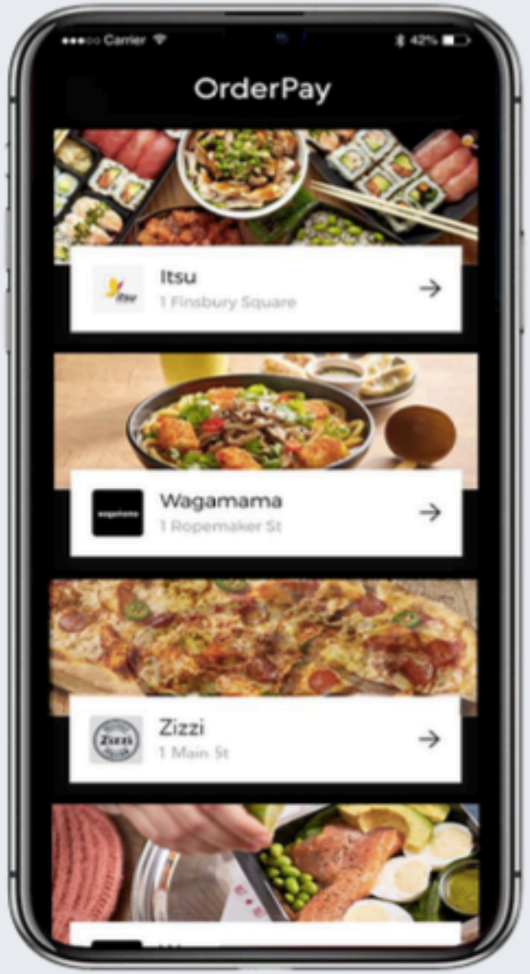
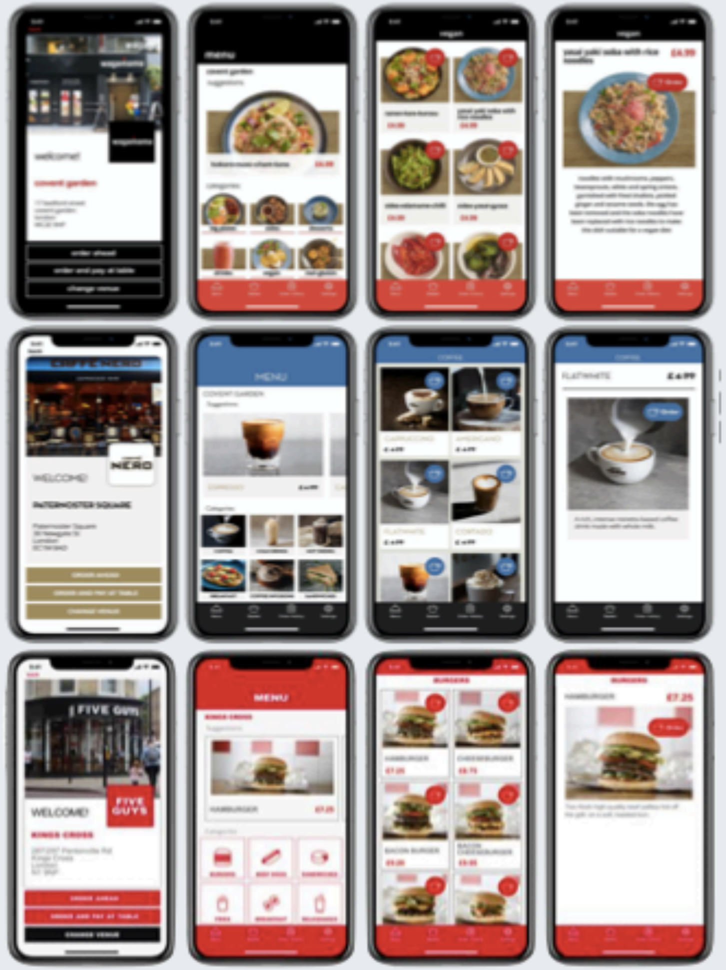


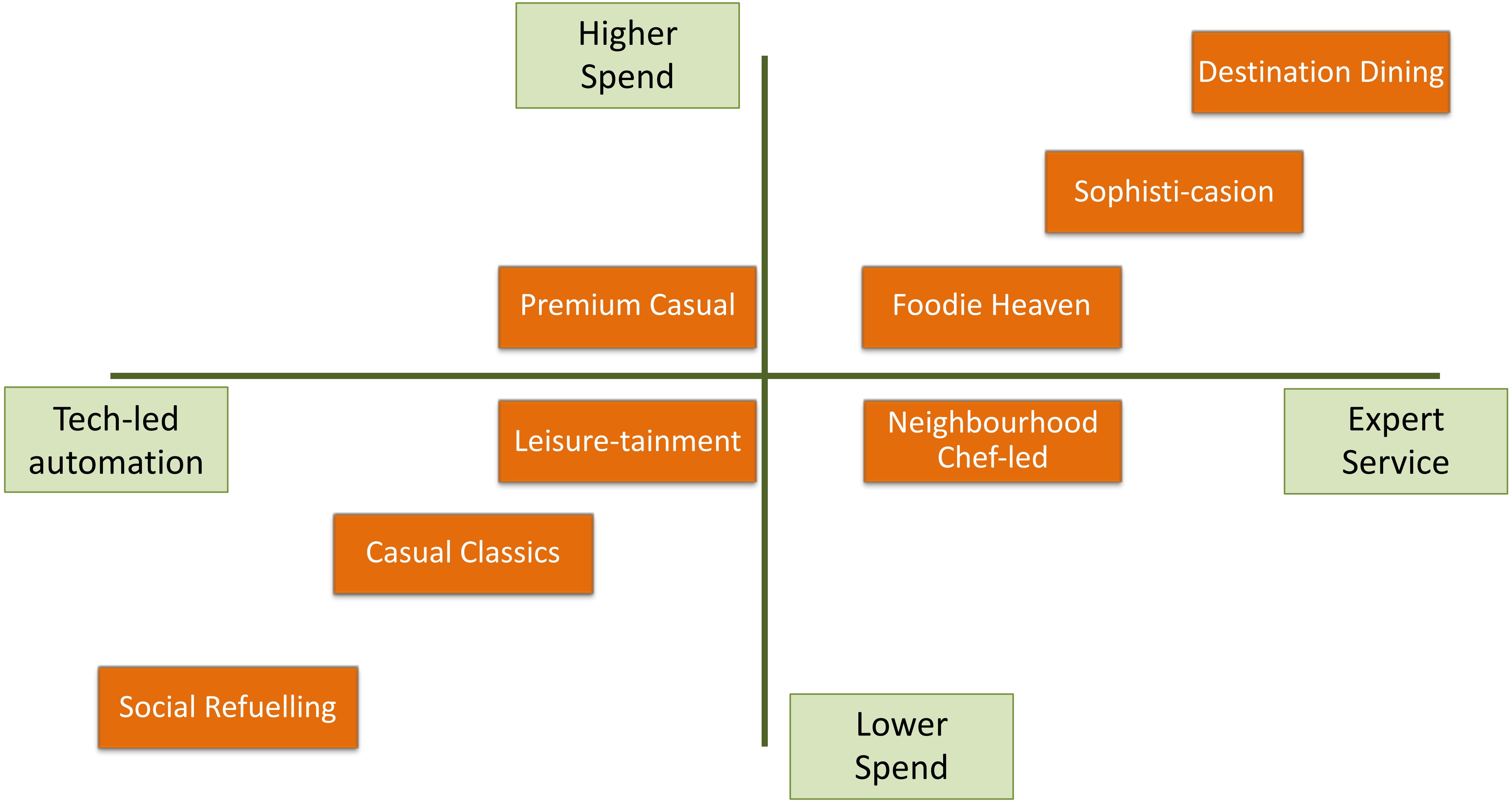
Off Premise

On Premise



'Reskin & then locks to brand'

Polarisation of Restaurants



Restaurants – Winners & Losers

SLIM CHICKENS

Gigaling Squid

Pizza Hut

Neighbourhood, Chef-Led Restaurants/Bistro's

Fast Casual / New Fast Food

Specialised Cuisines

Leisure-located non-differentiated brands –

Pubs – Winners & Losers

Oakman
INNS & RESTAURANTS

Suburban, Food-Led sites

LOUNGERS

Suburban, Neighbourhood mixed-use sites

Tenanted Food-Led Pubs

Jamies
WINE BAR & RESTAURANT

City Centre, After-work, Drink-led sites

A Future for Pubs / Alternative Accommodation

FULLER'S

FULLER'S ACQUIRES COTSWOLD INNS & HOTELS

BEAUTIFUL BEDROOMS BY FULLER'S

Brunning & Price LIMITED

MARSTON'S

BIKE & BOOT

Wadobi (noun), meaning: Facilities for **wa**lkers, **do**gs, **bi**kers, surfers.

Leisure / Holiday parks

Haulfryn

CALLALY LEISURE LTD

Parkdean Resorts
Creating Amazing Memories

BOURNE LEISURE LIMITED

john fowler HOLIDAY PARKS

pure leisure

LUXURY LODGES
UNWIND AND DISCOVER

Verdant Leisure

Away Resorts

Gulliver's World

forest holidays

SHOREFIELD HOLIDAYS

blp Bridge Leisure Parks

WOOD LEISURE

The New Leisure - RetailTainment

A different style of Hospitality

- Time Out Market
- Kerb Seven Dials
- Eataly
- Mackie Mayor
- Cargo Bristol
- Etc etc……

- Younger consumers,
- Happy with crowded spaces,
- Experiential,
- Lower cost / better value,
- Mix of day-parts,
- Mix of occasions,

A New Breed of Café - Farm Dining

Blurred lines of Retail, Convenience & Foodservice

BETTER FOOD
Organic. Local. Ethical.

STRETFORD FOODHALL

New Food Models

New Food Models

New Food Models

New Food Models

Dark Kitchens and Virtual Brands

KICK-ASS BURRITO

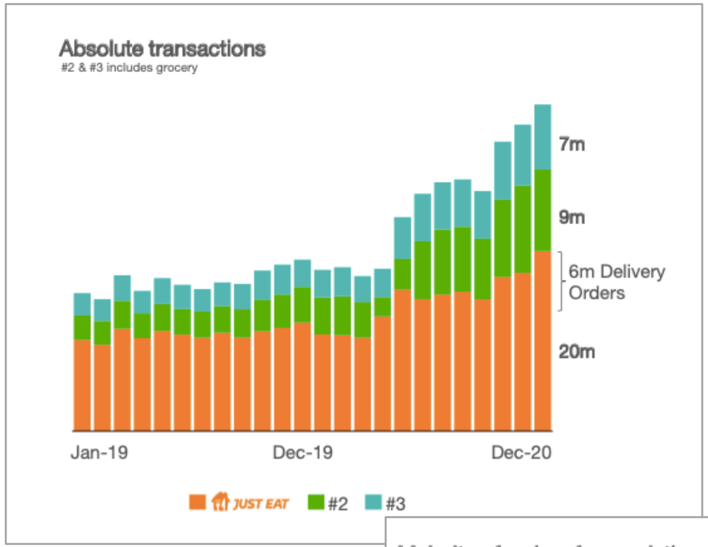
BIRD

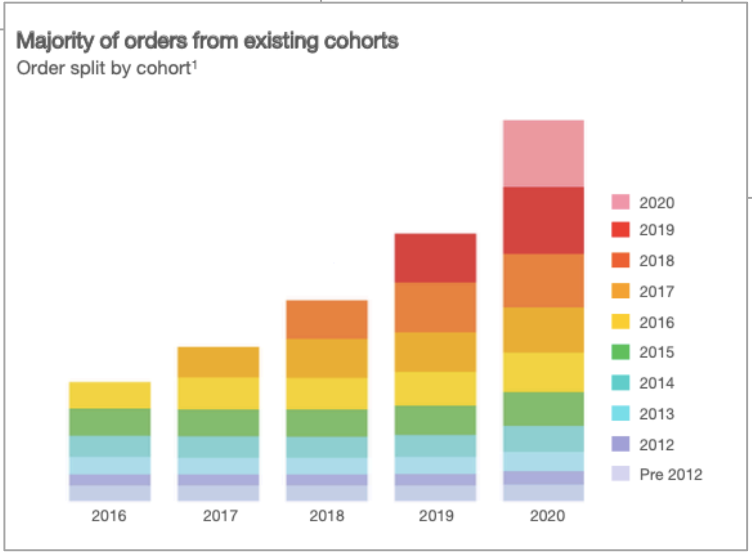
STACKS

PUDDO

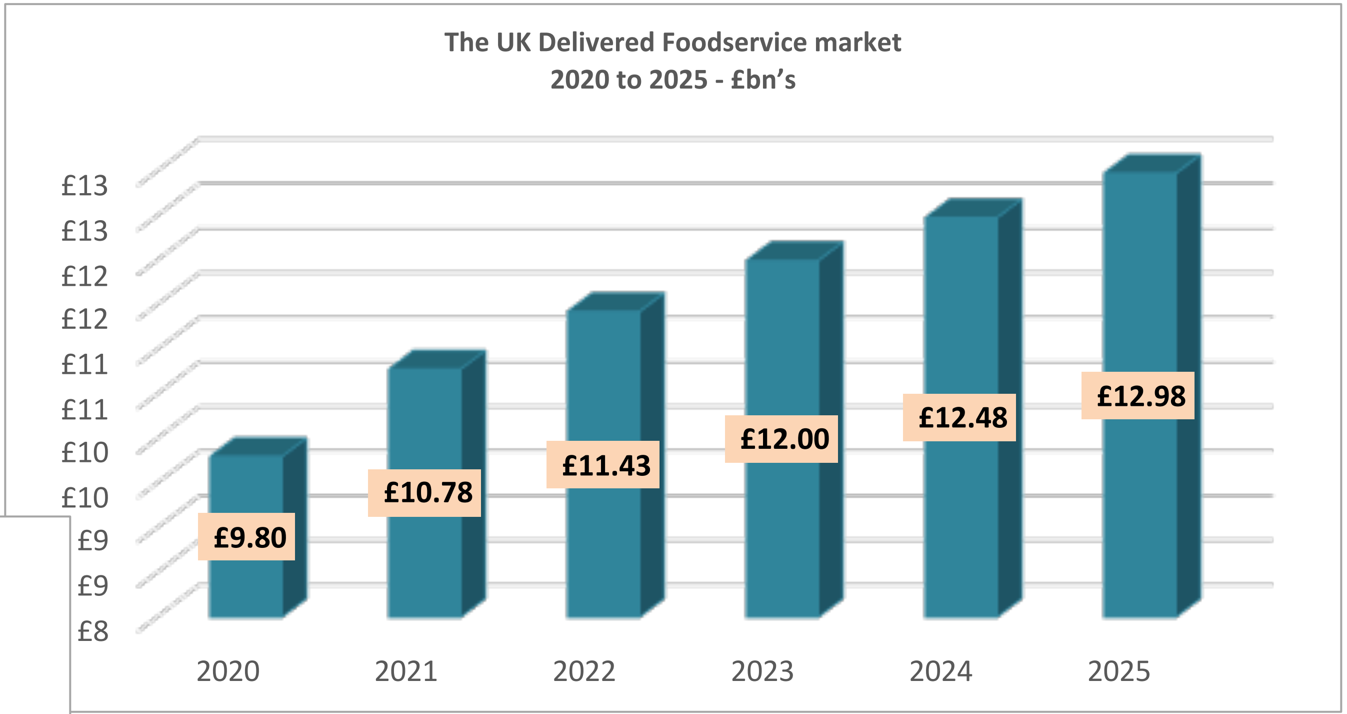
MR BEAST

Delivered Foodservice Market – forecast to 2025





Above:
Analysis by Just Eat of the increase in transactions, and of their customer base, by the year in which they started ordering from the platform, and how they continue to use the services.



Above:
Forecasts by FutureFoodservice of the potential continued growth for the UK Delivered Foodservice market

So many changes -

How does that affect
2021
and beyond ?

Source: FutureFoodservice analysis

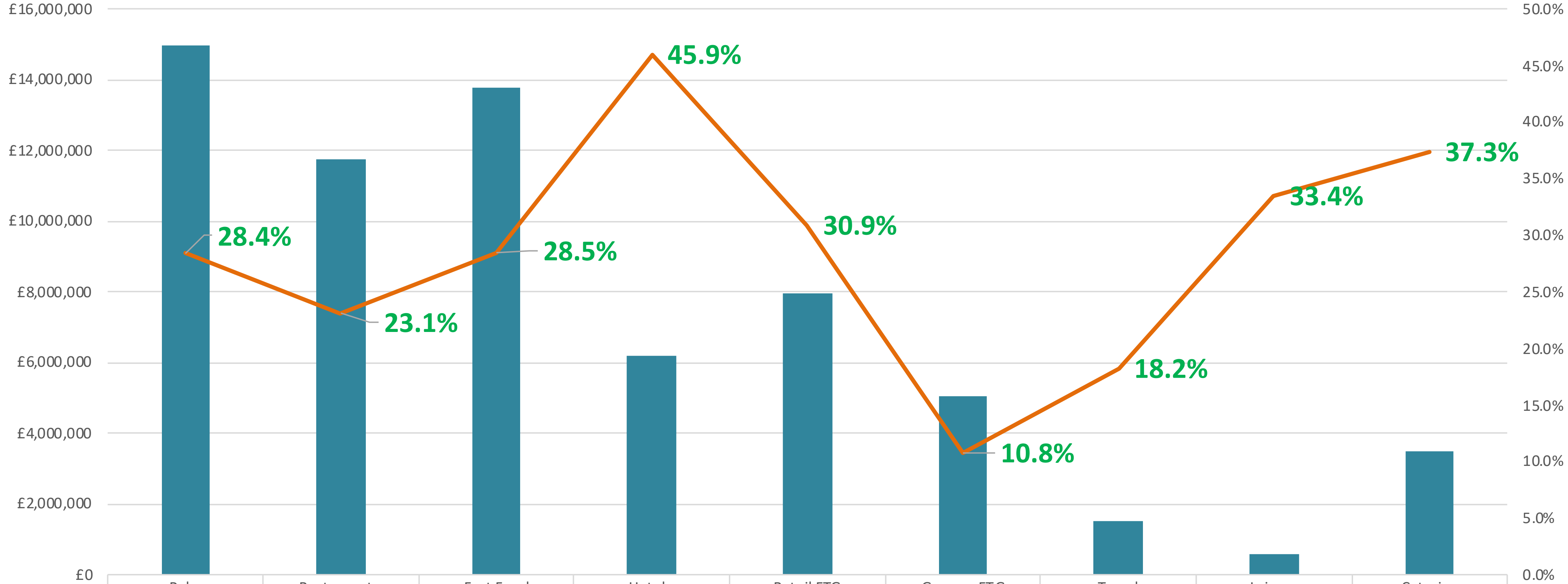
Sector Forecasts 2019 - 2021

	2019 £98,106m	2021 £65,272m
RESTAURANTS - SERVICE	£19,413m	£11,742m
RESTS. – FAST FOOD	£8,600m	£8,193m
RESTs. – FAST FOOD INDIE	£6,200m	£5,587m
PUBS	£25,200m	£14,972m
HOTELS	£10,727m	£6,191m
RETAIL HIGH ST.	£10,977m	£7,941m
RETAIL GROCERY FTG	£7,084m	£5,042m
TRAVEL	£2,547m	£1,517m
LEISURE	£1,528m	£598m
CONTRACT CATERING	£5,830m	£3,489m

- £33bn decrease in total revenue for the industry in 2021, a 33.5% decline
- Pubs experience the largest fall in absolute terms, by £10.2bn

2021 – sector growth rates

Forecasted annual 2021 sales by Foodservice channel with annual growth over 2020



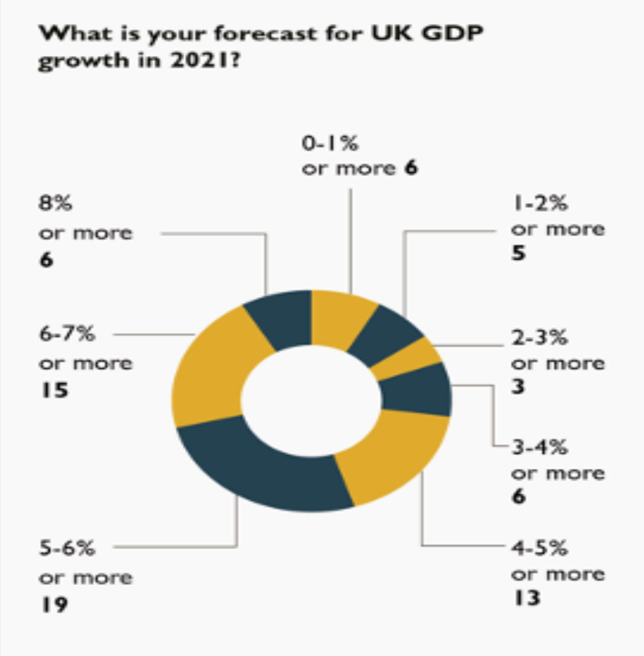
	Pubs	Restaurants	Fast Food	Hotels	Retail FTG	Grocery FTG	Travel	Leisure	Catering
2021 sales	£14,972,308	£11,741,832	£13,780,471	£6,190,855	£7,941,368	£5,041,714	£1,516,828	£598,069	£3,488,800
Sales growth %	28.4%	23.1%	28.5%	45.9%	30.9%	10.8%	18.2%	33.4%	37.3%

2021 sales Sales growth %

2021 to 2025 – Economic macro-factors

The Times annual survey of 73 UK-based economists, identifies their predictions for the key macro-factors.
Prediction for GDP growth in 2021 was as below:

- 34/73 forecasting growth between +5 and +7%
- 21/73 forecasting growth of +2 to 5%



The EY ITEM club, which mimics the Bank of England modelling, forecasts GDP growth from 2021 to 2024 as below -

- +6.2% growth in 2021
- +4.3% in 2022
- Back to normal levels in 2023 & 24

EY ITEM CLUB	UK GDP
2018	+1.3%
2019	+1.3%
2020	-11.6%
2021	+6.2%
2022	+4.3%
2023	+1.9%
2024	+1.8%

The EY ITEM club also predicts consumer spending over the next 5 years to be as below

- Substantial increase in 2021
- Further growth in 2022
- Settling down in 2023 & 24

Supported by wage growth from 2021 onwards –

- Increasing by 1.9% in 2021
- Over 3% in subsequent years

EY ITEM CLUB	Consumer Spending	Wage Growth
2018	+1.4%	3.3%
2019	+0.9%	3.5%
2020	-14.9%	0.8%
2021	+7.2%	1.9%
2022	+4.5%	3.1%
2023	+1.9%	3.5%
2024	+1.8%	3.6%

tureFoodservice analysis

Key Factors for 2022 Revenues

The key factors behind foodservice market growth that have been built into the forecasts, from 2022 onwards, include:

VAT
With the reversion of VAT to 20% in April 2022, increasing from 12.5% in place since Oct 2021, we forecast that revenues will decline in Q2 before rebuilding again.
Some of the VAT increase will be absorbed, but some will be pushed into price increases.

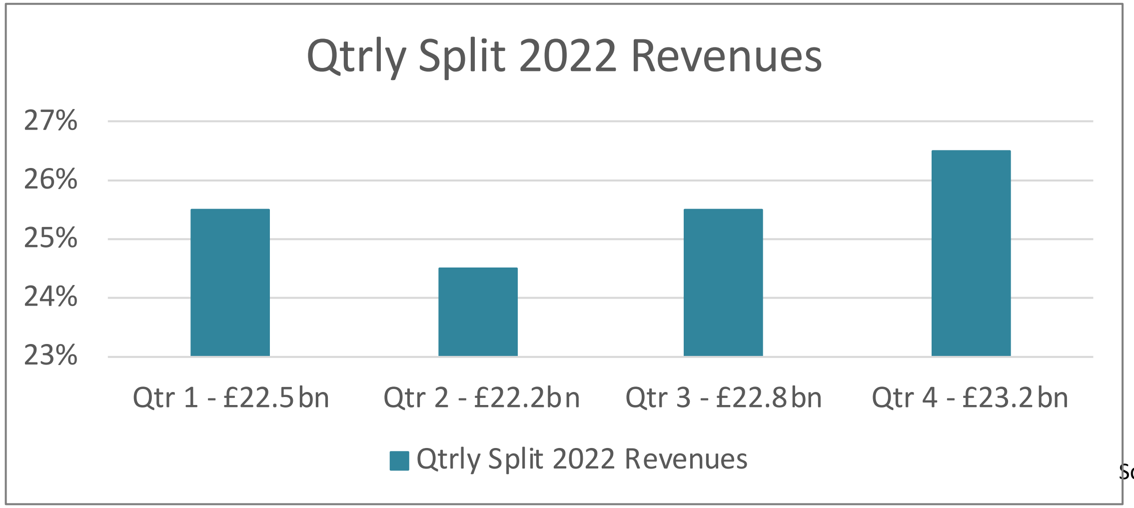
Inflation
We allowed in the forecasts that inflation will rise to 1.4% in 2021, before increasing to 2.5% in 2022, taking into account the increase in VAT and menu price rises.
Inflation is then forecast to remain at 2% for 2023 and 24.

Unemployment
We built in a steady decrease in unemployment levels into each quarter of 2022, as the economy gradually recovers.
Greater employment feeds through into consumer confidence and spending through the 2022 forecasts.

Spending
In line with the EY ITEM club forecasts, we included an element of consumer spending increasing into the forecast for 2022.
We allowed for the drip feeding of the increased savings from 2020 to bear fruit

2022 forecast Total Foodservice market value of £90.7bn -

- Quarter 1 is normally the lowest revenue period in the Hospitality year, however with the VAT benefit this is not the case, even with negative factors of a potential winter outbreak of flu or coronavirus
- Quarters 2,3 and 4 all build, with the factors outlined above having a degree of impact; the VAT increase in Q2 decreases net sales.



Source: FutureFoodservice analysis

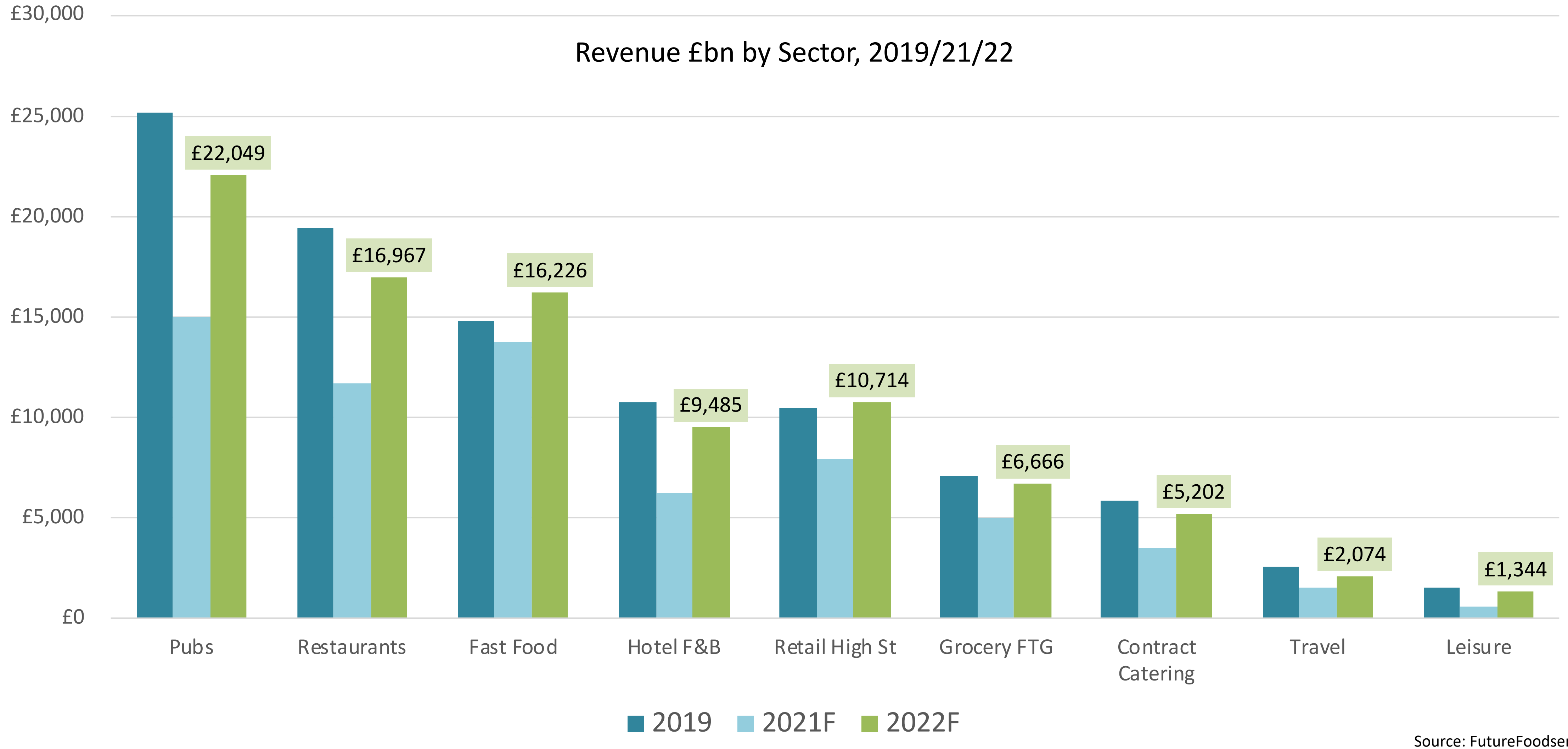
Market Forecasts by Sector - 2022

	2021 £65,272m	2022 £90,726m	%age Change
RESTAURANTS - SERVICE	£11,742m	£16.967m	+45%
RESTS. – FAST FOOD	£8,193m	£9,430m	+15%
RESTs. – FAST FOOD INDIE	£5,587m	£6,796m	+21%
PUBS	£14,972m	£22,049m	+47%
HOTELS	£6,191m	£9,485m	+53%
RETAIL HIGH ST.	£7,941m	£10,714m	+35%
RETAIL GROCERY FTG	£5,042m	£6,666m	+32%
TRAVEL	£1,517m	£2,074m	+37%
LEISURE	£598m	£1,345m	+125%
CONTRACT CATERING	£3,489m	£5,202m	+49%

- £24.5bn increase on 2021 revenues, as the industry recovers
- 39% increase on 2021
- -7.5% down on 2019 levels

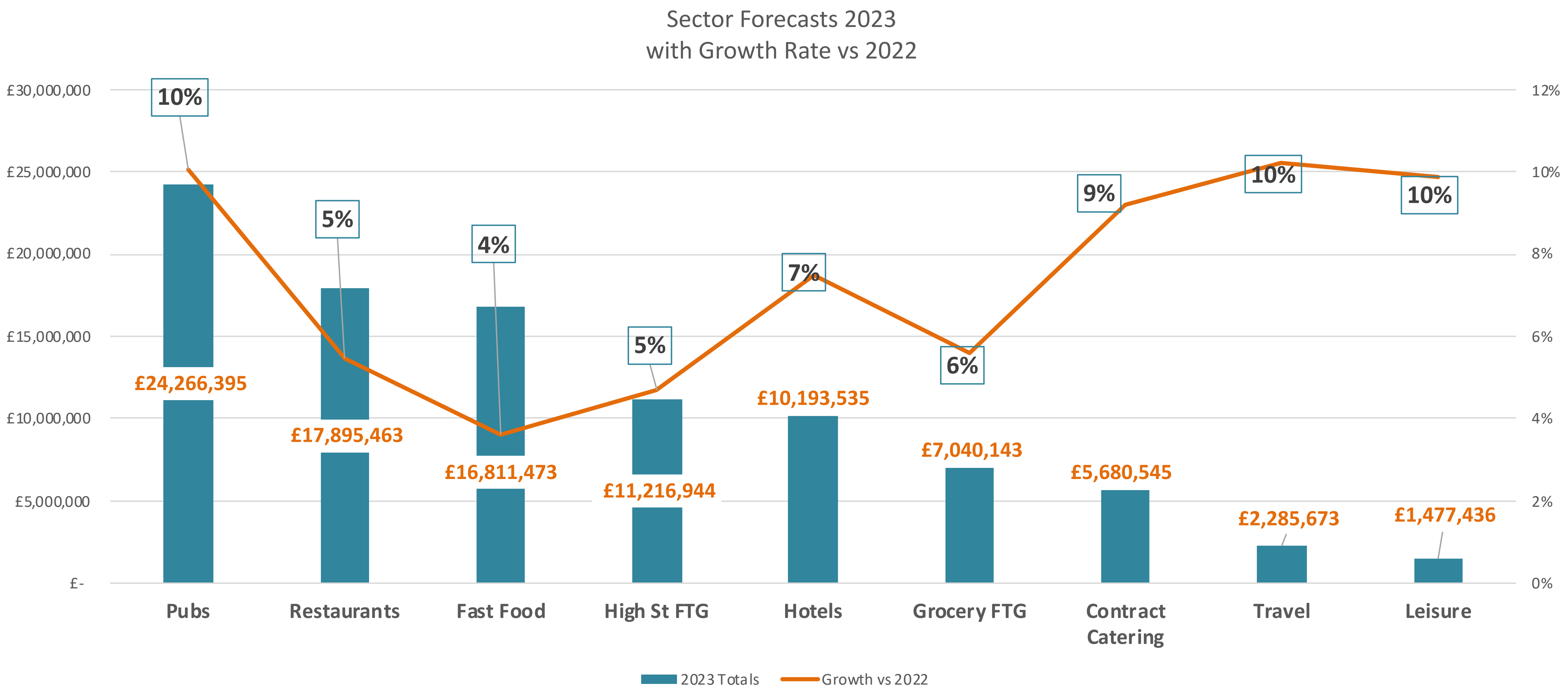
Source: FutureFoodservice analysis

Market Forecasts by Sector 2019 - 2022



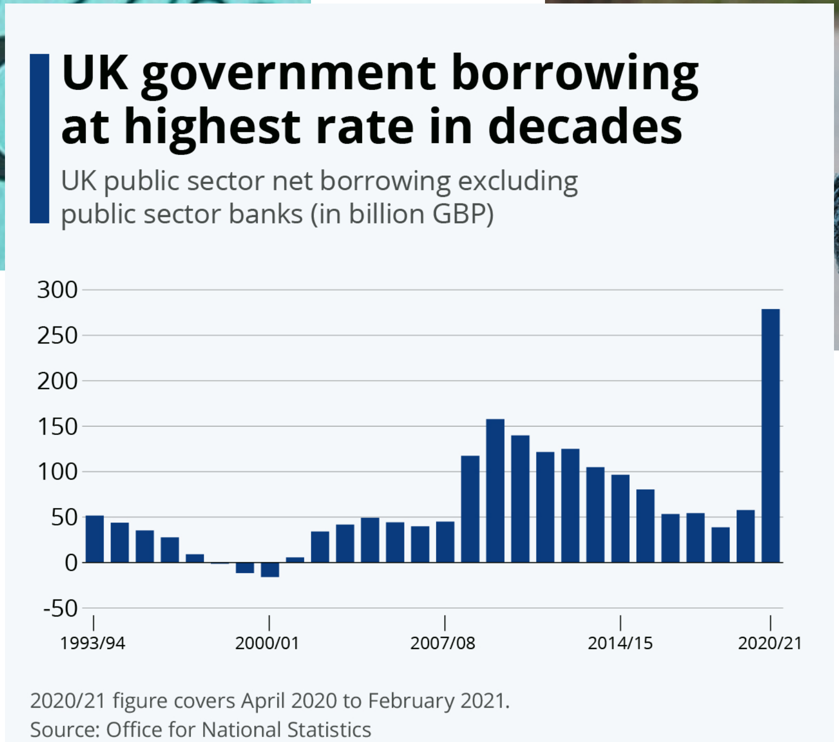
Source: FutureFoodservice analysis

Sector Forecasts 2023

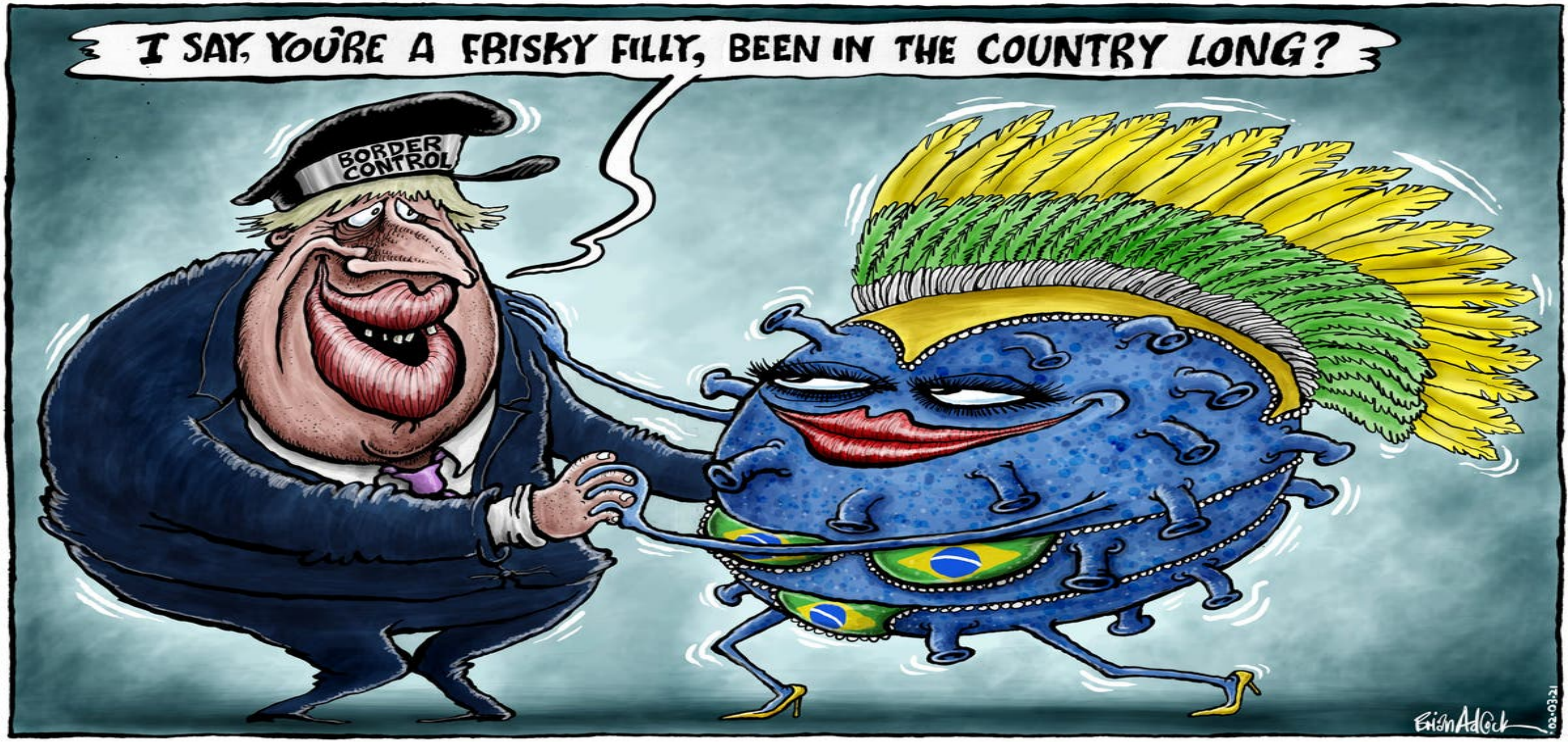


Source: FutureFoodservice analysis

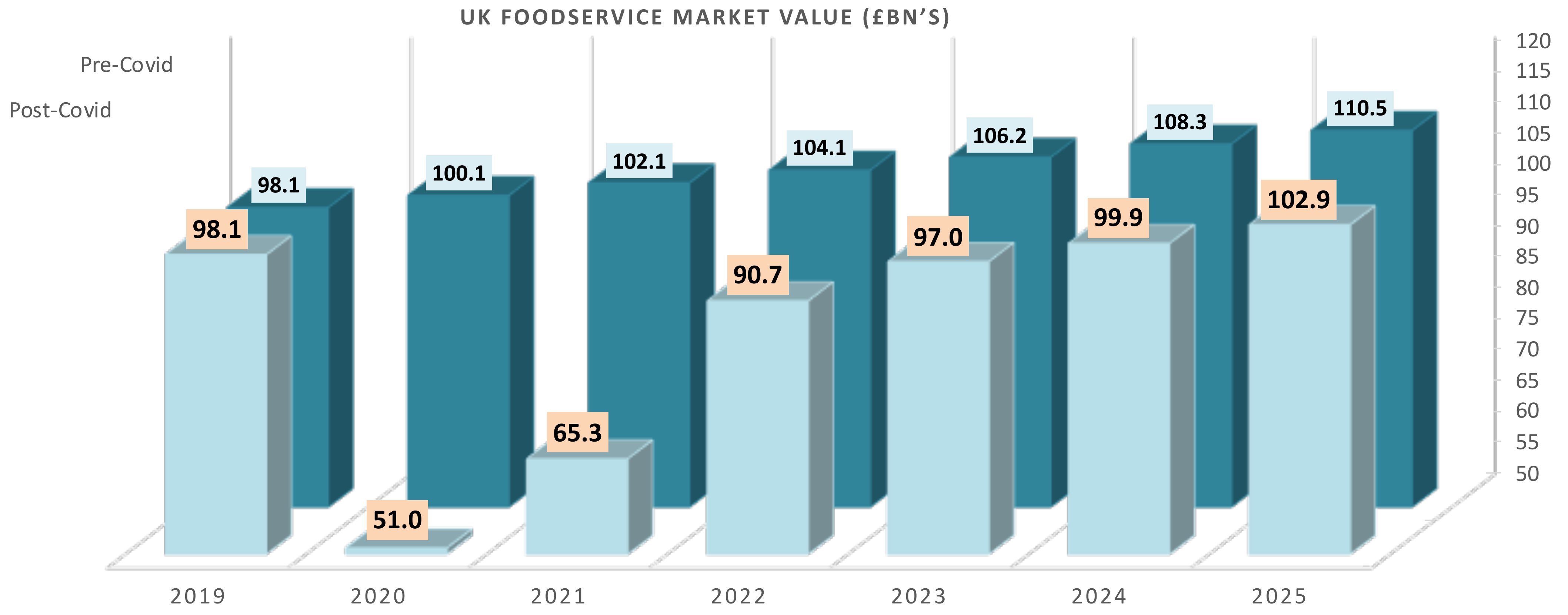
2022 – 2025 Macro Factors



Source: FutureFoodservice analysis


I SAY, YOU'RE A FRISKY FILLY, BEEN IN THE COUNTRY LONG?
BORDER CONTROL
Brian Adcock
02.03.21

2019 – 2025 Foodservice Growth Forecasts



The background chart shows the previously forecasted growth from 2019 to 2025, if Covid had not intervened.
The Foreground chart shows the current calculations and forecasts, as of March 2021.

Source: FutureFoodservice analysis

Future Foodservice UK will gain
+ £25 Bn
in 2022,
before growing further.

It will be different.....

Source: FutureFoodservice analysis


Is this what we think about the future ?


CAFEX
CAFEX
Is this what we think about the future ?


Is this what we think about the future ?

Is this what we think about the future ?


It will certainly be different

Need to take notice of…………

New Food Models –

- Dark Kitchens
- Virtual Brands
- Central Production Units
- Meal Kits – Restaurant at Home
- Subscription services
- Delivered Foodservice
- Micro-Markets

New Propositions –

- Hybrid Hubs – residential, retail, F&B, office
- Social Refuelling – tech driven foodservice
- Local Community – Neighbourhood services
- Food Markets – destinations
- Leisure-Tainment – competitive socializing, new retail, expanding leisure market
- Destination Dining – experiential
- Hospitality at Home – meal kits, delivery
- Faster Food formats

THE FUTURE OF FOODSERVICE

2021 to 2025
The Rebuilding of Hospitality

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Simon Stenning
Strategic Advice for Foodservice

Q&A

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Thank You

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