

Roadside Catering - UK - October 2014

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“Overheads from the running of MSAs (Motorway Service Areas) often hamper opportunities to lower prices. However, there could be merit in developing more on-trend and gourmet food options to help in-transit consumers equate roadside food prices with quality and variety rather than expense.”
 – Jack Duckett, Consumer Lifestyles Analyst

This report looks at the following areas:

- Challenging the ‘unhealthy’ fast food culture of MSAs
- Boosting usage amongst older consumers

High operating costs, a decline in the number of outlets and sustained cautious consumer spending mean that the roadside catering market has seen little actual sales growth in recent years. The market has also remained dogged by consumer attitudes towards the cost of food and drink at roadside eateries, as well as being slow to respond to changing foodservice trends, such as growth in healthy eating and the rise of fashionable ethnic eateries.

Going forward, the main challenges for the roadside catering market include price-conscious consumers and the need to adapt to changing food trends.

This report will examine the usage of roadside service stations and roadside restaurants, the considerations users take into account when deciding where to stop, the types of food and drink they are interested in, their attitudes towards various market issues and their interest in potential new flavour options.

BUY THIS
REPORT NOW

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Roadside Catering - UK - October 2014

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Introduction

Products covered in this report

Abbreviations

Executive Summary

Roadside catering market sees limited growth in real terms

Figure 1: Best- and worst-case forecast for the UK roadside catering market, 2009-19

Market drivers

Companies, brands and innovation

Figure 2: Roadside service stations and roadside restaurants, by number of sites, 2010 and 2014

Nearly four in five stop at roadside service stations for food/drink

Figure 3: Reasons for stopping at roadside service stations, August 2014

Convenience the key reason behind choice of service station

Figure 4: Reasons for stopping at particular service station, August 2014

Branded offerings prove most popular

Figure 5: Types of food/drink consumers look for, August 2014

Four in five agree food is overpriced

Figure 6: Attitudes towards roadside service stations and restaurants, August 2014

What we think

Issues and Insights

Challenging the 'unhealthy' fast food culture of MSAs

The facts

The implications

Boosting usage amongst older consumers

The facts

The implications

Trend Application

Trend: Locavore

Trend: Help Me Help Myself

Futures Trend: Old Gold

Market Drivers

Key points

Growth in elderly and juvenile populations creates growth prospects

Figure 7: Trends in the age structure of the UK population, 2009-19

Car ownership remains high

Figure 8: Ownership of cars, February 2014

Price of petrol

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com

Roadside Catering - UK - October 2014

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 9: Price of petrol, January 2012-August 2014

Changes in signage legislation

Disposable income on the up

Figure 10: Trends in how respondents would describe their financial situation, June 2009-June 2014

Deaths from drink-driving on the rise

Figure 11: Deaths from drink-driving in Britain, 2006-12

Who's Innovating?

Key points

Westmorland Group offers alternative service station

Figure 12: Westmorland Gloucester services launch, August 2014

High street outlets shift into roadside catering market

Premium supermarkets become major attraction

Shift towards ethnic food outlets

JD Wetherspoon opens first roadside service station pub

Healthy eating initiatives

Market Size and Forecast

Key points

Roadside catering market sees limited growth in real terms

Figure 13: UK roadside catering market, 2009-19

Market trajectory set to continue

Figure 14: Best- and worst-case forecast for the UK roadside catering market, 2009-19

Forecast Methodology

Market Share

Key points

Little Chef continues to contract

Figure 15: Roadside service stations and roadside restaurants, by number of sites, 2010 and 2014

Moto dominates roadside service station market

Other operators steal share from the big three MSAs

Companies and Products

MSAs – Major Players

Moto Hospitality

Background

Financials and strategy

Figure 16: Key financials for Moto Holdings Limited, 2012 and 2013

Product range and innovation

Welcome Break

Background

Financials and strategy

BUY THIS
REPORT NOW

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100
EMAIL: reports@mintel.com

Roadside Catering - UK - October 2014

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 17: Key financials for Welcome Break Limited, 2011/12 and 2012/13

Product range and innovation

Roadchef

Background

Financials and strategy

Figure 18: Key financials for Roadchef Limited, 2012 and 2013

Product range and innovation

Smaller MSAs

Extra MSA Services Ltd

Background

Financials and strategy

Product range and innovation

Non-MSAs

Little Chef

Background

Financials and strategy

Product range and innovation

The Consumer – Usage and Reasons for Stopping at Roadside Service Stations and Restaurants

Key points

Younger adults prove bigger users of roadside services and restaurants

Figure 19: Proportion of consumers who have stopped at roadside service station in last 12 months, August 2014

Domestic travel boosts usage of roadside services by the most affluent

Nearly four in five stop at roadside service stations for food/drink

Figure 20: Reasons for stopping at roadside service stations, August 2014

Younger consumers more likely to want on-the-go food and drink

Figure 21: Reasons for stopping at roadside service stations, stopping for food/drink, by age, August 2014

Opportunity to convert more stoppers into shoppers

Roadside supermarkets offer convenience

The Consumer – Factors Influencing Choice of Service Station

Key points

Convenience the key reason behind choice of service station

Figure 22: Reasons for stopping at particular service station, August 2014

Men more likely to plan ahead where to stop

Figure 23: Reasons for stopping at particular service station, by gender, August 2014

Nearly a third influenced by the brand of retailers/food outlets

The Consumer – Popular Types of Food and Drink

Key points

The convenience of branded offerings proves most popular

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com

Roadside Catering - UK - October 2014

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 24: Types of food/drink consumers look for, August 2014

- Men seek energy-boosting products
- People seek special offers to overcome high prices
- One in five seek premium food and drink offering

The Consumer – Attitudes towards Roadside Service Stations and Restaurants

Key points

Four in five agree food is overpriced

Figure 25: Attitudes towards roadside service stations and restaurants, August 2014

Older consumers against alcohol being sold in roadside service stations

Figure 26: Agreement with the statement "It is not appropriate for roadside service stations to serve alcohol", by age, August 2014

Increasing the range of food types: premiumisation and ethnicity

Consumer emphasis on health extends to roadside service stations

The Consumer – Interest in Menu Options

Key points

Demand for healthy options

Figure 27: Interest in menu options, August 2014

Younger consumer show biggest interest in new flavours

Figure 28: Proportion of adults likely to try foods in roadside service stations/roadside restaurants, by age, August 2014

Consumers have high expectations for burgers and pizzas

Targeted ethnic flavours

BUY THIS
REPORT NOW

VISIT: store.mintel.com
 CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100
 EMAIL: reports@mintel.com