

2030 VISION



THE FUTURE OF
FOODSERVICE
2024 TO 2030



Information Involvement Influence



A Changing Landscape.....



Drive Thru Coffee

Drive-Thru Coffee

Drive Thru Fast Food

Dark Kitchen

Market Hall

Outdoor Street Food

Dessert Cafe

Dessert Cafe

Just Walk Out Convenience

Luxury Hotel & Spa

Competitive Socialising

Juice/Tea Bar

Roastery / Brewery

New Budget / Pod Hotel

Robot Vending Solutions

Leisure – Tainment venue

Competitive Socialising

Hybrid Work / Cafe

Farm Shop / Farmers Market

Activity Centre

Forecourt / Community Hub

Premier Inn

Novotel

Citizens advice bureau

Roastery / Brewery

Library

Metro Station

Police Station

Job centre plus

Combined Courts

Bus Station

Railway Station

University

Civic Centre

Magistrates Court

Post Office

Health House

Central Baths

Travelodge

Whitmore Hill

Corporate Hospitality

Activity Centre

Farm Shop / Farmers Market

➤ Competitive threats to traditional hospitality from the changing landscape



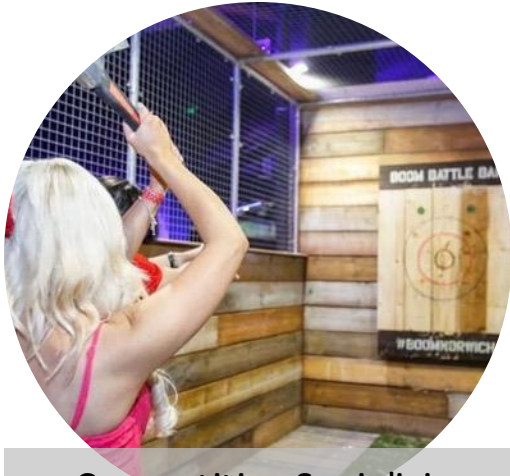
Cocktail Bars



Juice Bars



Dessert Cafes



Competitive Socialising



Market Halls

➤ Growing polarisation between Social Refuelling and Experiential, Premiumised Dining



Social Refuelling:
Simplified, quality food, but at lower cost than casual dining, eg Marugame Udon



Premiumised, Experiential Dining:
Eg Ivy Asia, Labyrinth, Monarch Theatre, Big Mamma Group



Pressure on Casual Dining





Current Climate



“In this current climate, no-one is bulletproof” – Glynn Purnell closes flagship restaurant after 17 years



Current Climate



➤ Market Halls – considerable growth into new areas. New Social Refuelling sites.



➤ Fast Food – Increasing 'Americanisation'



All expanding their number of stores and reach

FIVE GUYS®



➤ Further New Entrants.....



➤ Restaurants – Casual Dining – smaller chains expanding



7 new sites, on top of 37 at the end of 2023 = 19% growth.



4 new sites, on top of 24 at the end of 2023, plus another 4 announced = 17% growth.



5 new sites, on top of 17 at the end of 2023 = 29% growth.

➤ Pubs – or Restaurants ?



Carne

ARROSTO DI COSTINE DI MAIALE THEY'RE BACK!

A whole rack of tender ribs rubbed with herbs and spices, flashed on the chargrill then slow-roasted. Great for sharing! (GF)

£14.95

POLLO ALL'AGLIO

Chicken pieces cooked in white wine, garlic, rosemary and a splash of cream

£6.50

PANCETTA DI MAIALE AL SUGO

Boneless pork belly strips slow cooked in a rich tomato, garlic, chilli and herb sauce

£6.50

PESTO LOVES

POLLO FRITTO

Boneless chicken thigh, marinated in buttermilk, seasoned with Italian herbs & lemon, then deep-fried and served with a basil pesto mayonnaise

£6.50

SALSICCIA PEPPERONATA

Spicy Italian sausage, with sautéed peppers, garlic and new potatoes (GF)

£5.50

ALI DI POLLO AL FORNO

Chicken wings Tuscan-style, marinated then baked in the oven (GF)

£5.25

PESTO LOVES

POLPETTE DI MANZO

We think we have handmade more than 4 million of our 335 kcal own spicy meatballs (since 2006) which are cooked in a tasty tomato, garlic and herb sauce

£6.50

SPIEDINI DI POLLO

Skewer breast v ham, fla and bak

£6.50



PRIX FIXE MENU

Mon-Sat until 5.30pm

2 Courses £18.95 3 Courses £22.95

STARTERS

Soup du Jour v 205 kcal

Calamari Fritti 261 kcal

Garlic Mushrooms v 510 kcal

Gambas al Pil Pil 856 kcal +£1.50

Grilled Goat's Cheese v 436 kcal

Chicken Liver & Rosemary Pâte 392 kcal

MAIN COURSES

Pan-Roasted Chicken Suprême

Mustard cream sauce, pommes purée & buttered green beans 1386 kcal

170g Rump Steak 838 kcal +£2

227g Sirloin Steak 899 kcal +£6

Served with peppercorn sauce, skin-on fries & confit tomato

Salmon & Dill Fishcakes

Skin-on fries, fresh rocket & tartare sauce 1286 kcal

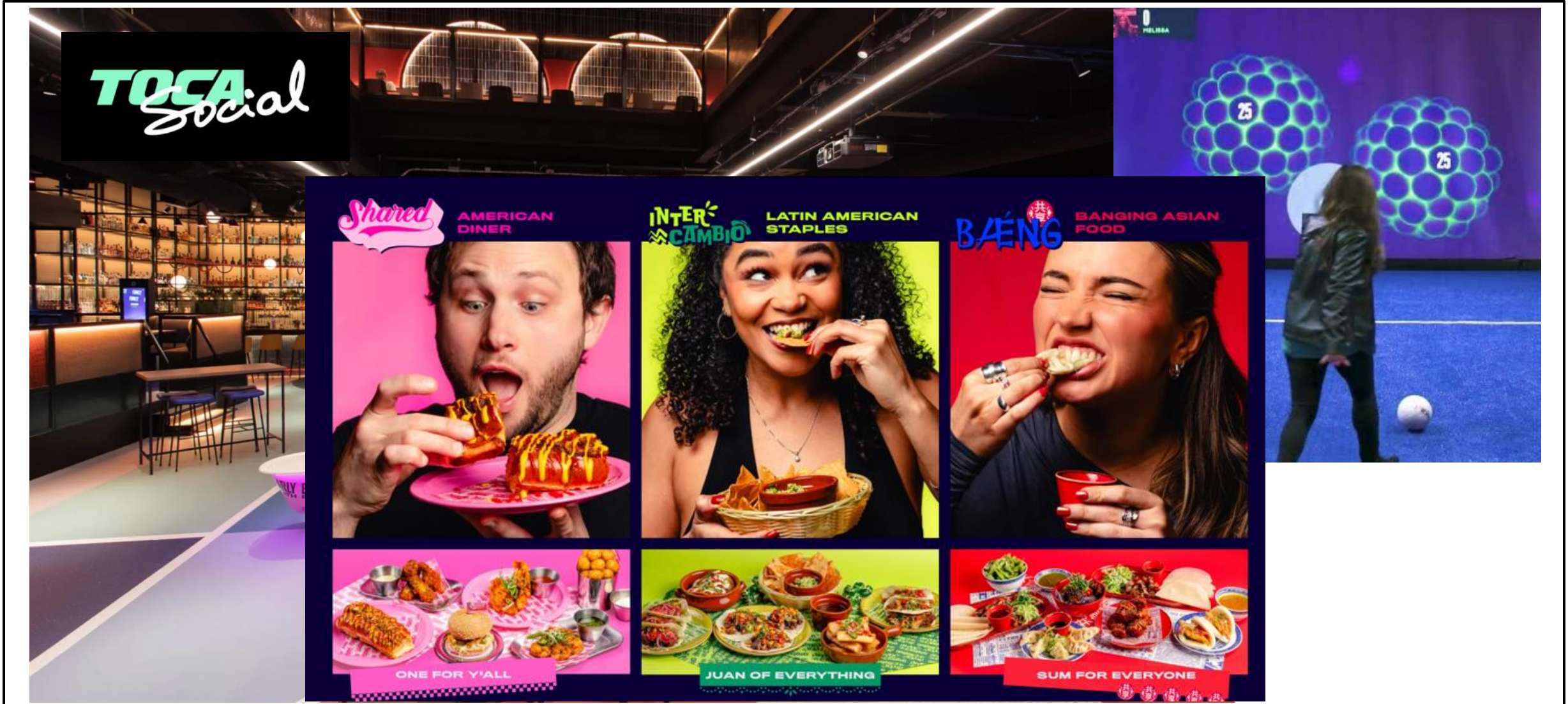
Spaghetti Carbonara 1290 kcal

➤ When is a Pub a Pub – and not a Restaurant ?

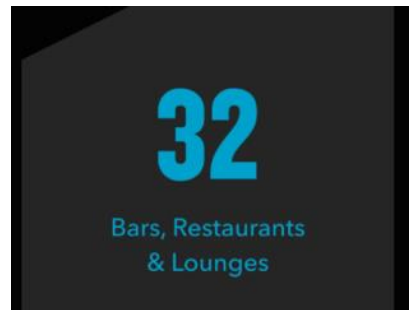


550 covers per day
850 on a Sunday

➤ Competitive Socialising – not just the activity....



➤ New Entertainment developments meeting growing consumer demand



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Friction-Free & the Pleasure Principle

Are the emerging fault lines shaping the UK hospitality landscape and determining foodservice fortunes

Friction Free



➤➤ Friction Free – further implementation of digital kiosks



➤➤ Friction Free – in growing range of concepts



➤ Friction Free – more self-service automation



➤ Friction Free – more Drive-Thru's – with a wider range of concepts



➤➤ Friction Free – more Drive-Thru's



➤➤ Friction Free – more Drive-Thru's – with a wider range of concepts



➤➤ Future Food To Go – further products & locations that are Friction Free



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➤➤ Friction Free Food to Go

the salad project



➤➤ Friction Free - even in restaurants !



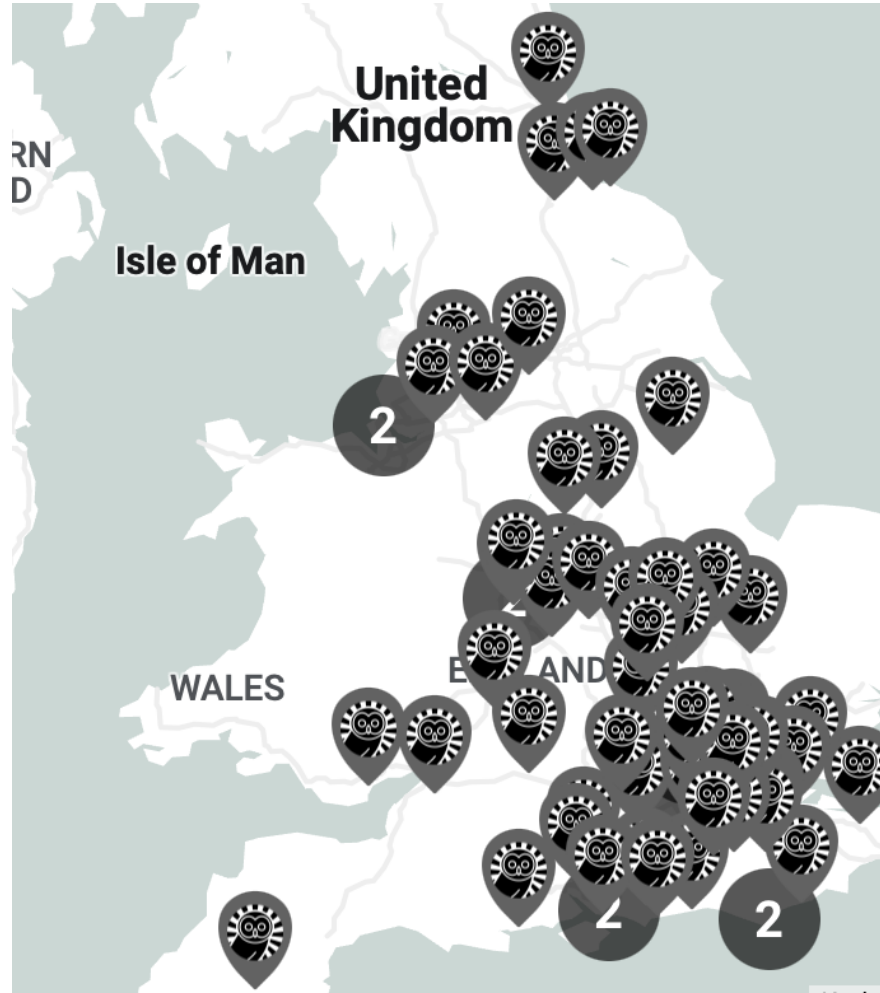
Gen Z don't want to talk to waiters, says Bill's boss

Cafe chief says younger customers prefer 'communicating through their phones'

➤ 'Digitally nimble, asset-light' Restaurant brands



➤ 'Digitally nimble, asset-light' Restaurant brands



GROWTH KITCHEN

snacc
Snacc
313 likes · 439 followers

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Intro
Lincoln's newest takeaway serving delicious food around the clock!

Posts
 Snacc is in Lincoln.
August 17 at 10:01 AM · 🌐

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Friction-Free & the Pleasure Principle

Are the emerging fault lines shaping the UK hospitality landscape and determining foodservice fortunes

➤ The Pleasure Principle - Premiumised, experiential and glamorous!

SEXY FISH

セクシーフィッシュ



➤➤ The Pleasure Principle – enhanced environments



➤ Albert's Schloss – an 'Alpine Pleasure Palace'



ALBERTS
SCHLOSS



➤ The Pleasure Principle – Cabaret restaurants



➤ The Pleasure Principle – Cabaret restaurants



➤ House of Gods Hotels – “Treat me like I’m famous”!



Where decadence meets
debauchery and *more*
is more...



➤➤ The Pleasure Principle – Ultra-Luxe Treating



➤➤ The Pleasure Principle – in all Sectors



The Pleasure Principle.....



£1bn UK spending. £850 per person per night.



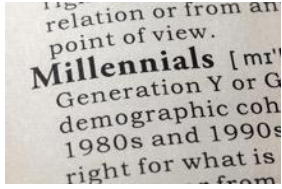

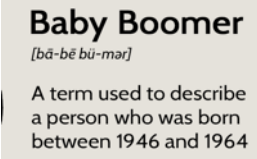
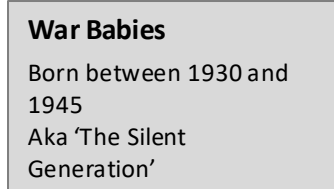


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➤ UK Demographics 2030 – Generations Forecast

					
Born between 2011 and 2026 (4-19)	Born between 1996 and 2010 (20-34)	Born between 1980 and 1995 (35 to 50)	Born between 1965 and 1979 (51 to 65)	Born between 1949 and 1964 (66 to 81)	Born between 1933 and 1948 (82 to 97)
12,365,000 17.6%	12,546,000 17.8%	13,286,000 18.9%	12,753,000 18.1%	10,607,000 15.1%	4,790,000 6.8%

Become the main part of the workforce

Focused on Leisure & Retirement, albeit with some still working

Convenience, Friction Free Delivery. Increasing Food For Now consumption

Leisure & Pleasure. Increasing foodservice consumption

➤➤ Developments to meet the demands for Leisure & Pleasure

EVERLY

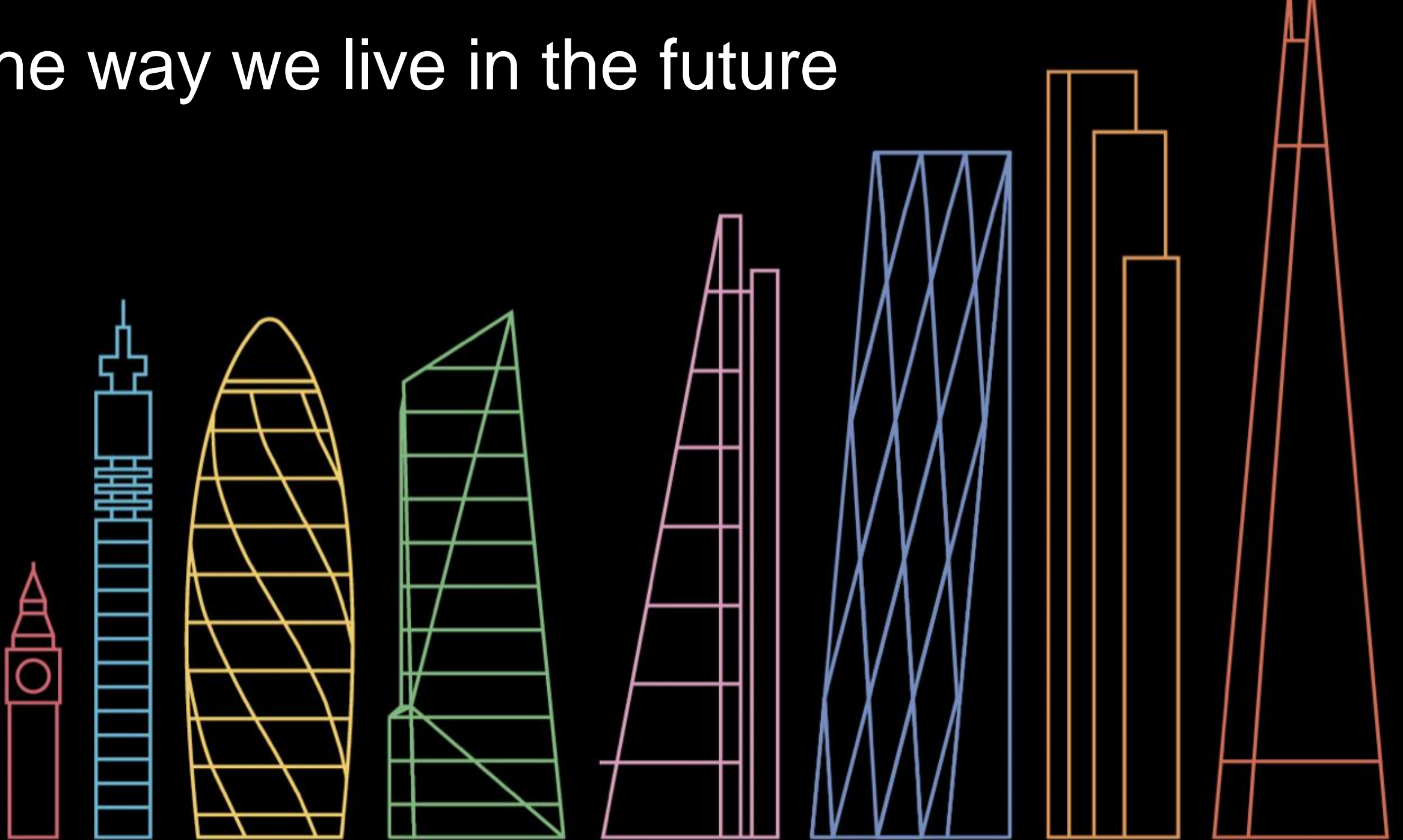
HOTELS COLLECTION



➤ Leisure experiences replace traditional hospitality



The way we live in the future



Croydon 2016



Croydon 2030



➤➤ The way consumers live





Share of Stomach – Pre-Covid





Future Share of Stomach – 2030



Only 2.5 meals per day consumed!
Snacks make up other meal occasions.



Growing snacking OOH; Growing delivery into home

More Food For Now



Future snacking not particularly healthy!

➤ Intervention into Healthier Eating.....

The Northern Echo

Fast food chains banned from opening near Newcastle schools

Starmer's 'nanny state' may tax sugar and salt

British Heart Foundation claims measures are necessary to stop record numbers of people dying early from heart disease

Hard-hitting warning labels should be on everyday food, say campaigners

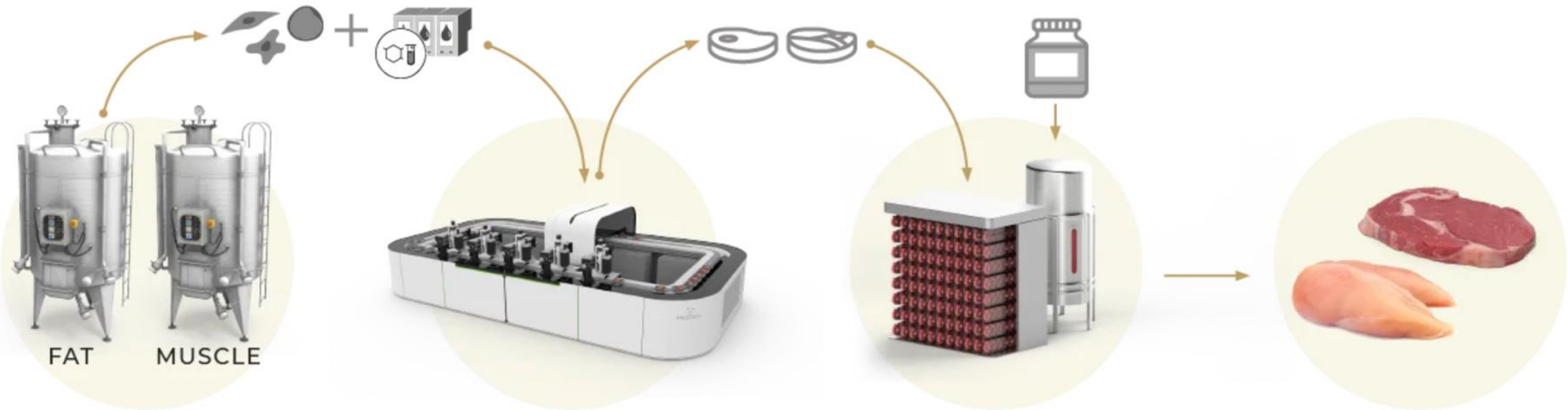


The future has to be more healthy

What we eat won't be radically different



Or maybe it will ?



BIO-INKS

Bio-inks formulated from our cell lines and unique scaffolding materials are loaded into our 3D bioprinter.

3D BIOPRINTING

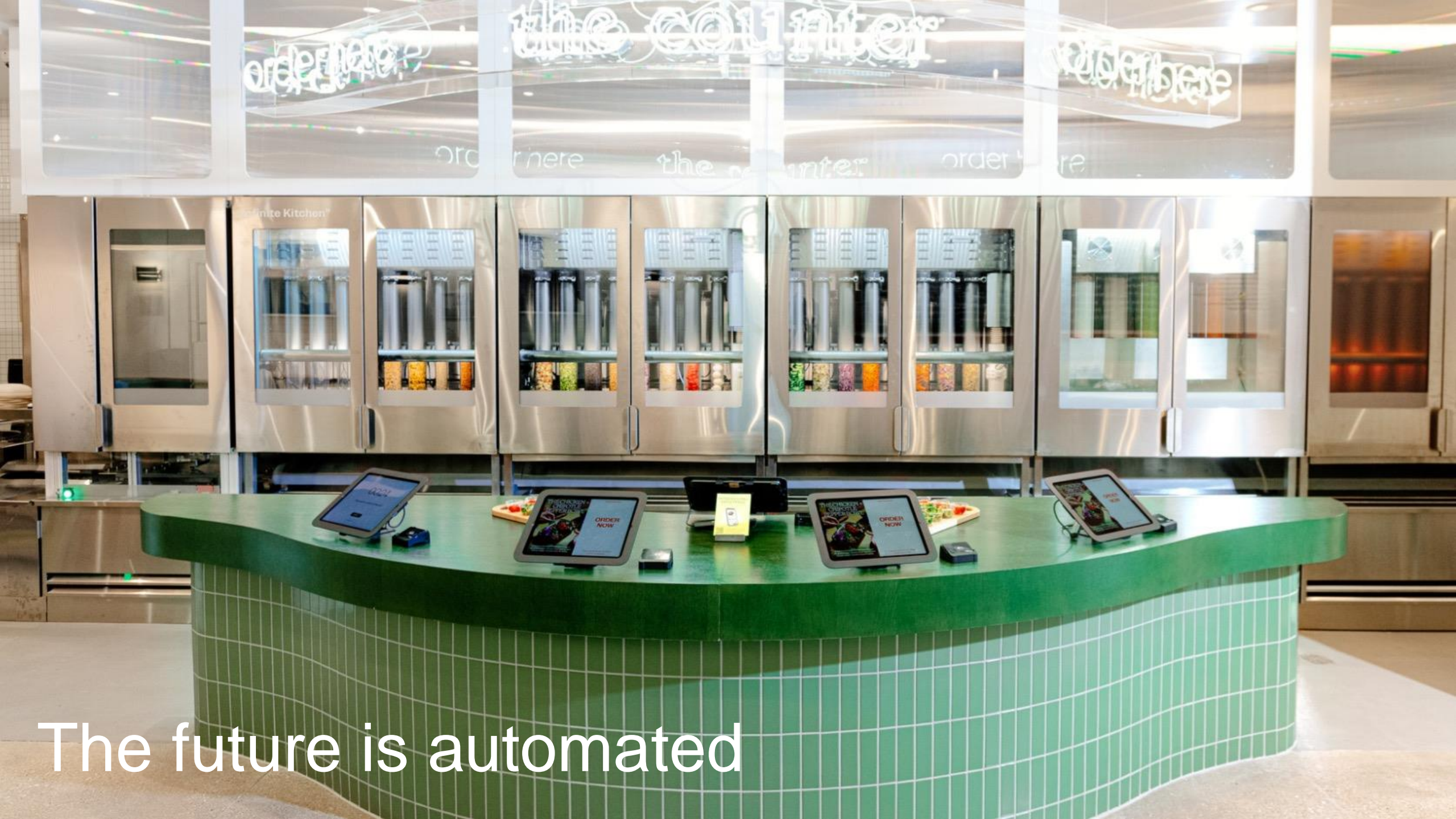
Bio-inks are accurately printed to assemble cells as they would be found in a conventional cut of muscle.

INCUBATION

Printed product is incubated to mature and form tissue.

STRUCTURED MEAT

Produced in fraction of time required to achieve same cut via conventional means.



The future is automated

The future is friction free



The future is Friction Free



The future is enhanced by technology



And yet, we want to be engaged.....



and great service is absolutely key!



The future is all about experiences



The future is all about the Pleasure Principle



The future is all about the Pleasure Principle



The Pleasure Principle ?

oasis
live '25

Definitely...Maybe !

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