

Horizons Definitions

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Sectors

There are 9 major sectors:

- Restaurants
- Quick Service Restaurants
- Pubs (or Drinking Places)
- Hotels
- Leisure
- Staff Catering
- Health Care
- Education
- Services

For some countries (such as the UK) we split the market into further sub-sectors as indicated below – but even in countries where this detailed analysis is not yet provided, each sector comprises the sub-sectors set out below.

Restaurants

Outlets which have table service and where the customer generally pays on departure.

- European
 - British/Cosmopolitan
 - Italian/Spanish
 - French
- Ethnic
 - Chinese/Oriental
 - Indian/Pakistani
 - Mediterranean
- Concept
 - In-Store
 - Specialist Roadside Restaurants
 - Pub Restaurants
 - Note: These are pubs where food sales account for over 50% of total sales
 - Pizza/Pasta
 - Mexican/Tex-Mex/Caribbean
 - Themed
 - Specialist Menu/Other

Quick Service

Outlets which may have take away or eat-in, or both, and where the customer generally pays when purchasing food or drink.

- Fast Food
Note: These are chains defined by name
 - Burger King
 - Domino's Pizza
 - KFC
 - Pizza Hut
 - Pret a Manger
 - McDonald's
 - Subway
- Cafes
 - Coffee Shops
 - Traditional Cafes
- Take Aways
Note: Outlets where take-away/delivery account for at least 50% of sales
 - Sandwich bars
 - Fish & Chips/Kebabs
 - Chinese/Oriental
 - Indian/Pakistani
 - Burger/Pizza/Chicken
 - Jacket Potatoes/Others

Pubs (or Drinking Places)

Outlets which focus on providing alcohol. Food sales are less than 50% of turnover.

Note: Bars that are part of a hotel are counted in the hotel sector.

- Brewery Owned
 - Tenanted and Leased
 - Managed Branded
 - Managed Unbranded
- Pubco Owned
 - Tenanted and Leased
 - Managed Branded
 - Managed Unbranded
- Other
 - Freehouse
 - Wine Bar
 - Night Club

Hotels

Outlets which provide overnight accommodation and where food accounts for less than 50% of turnover.

Note: Each site is counted as one outlet even though it might have several foodservice areas (e.g. restaurant, bar, room service). Self-catering outlets are not included.

- Hotels
 - 201+ Rooms
 - 101-200 Rooms
 - 51-100 Rooms
 - 26-40 Rooms
 - 11-24 Rooms
 - <10 Rooms
- Other Accommodation
 - Bed & Breakfast
 - Holiday Camps
 - Youth Hostels
 - Caravan Parks

Leisure

Outlets which are located in places where leisure services are the prime focus of activity. Outlets in this sector may be restaurants, quick service or pubs

Note: Outlets located on motorway service areas, leisure parks, factory outlet complexes etc. are included in the relevant sector (Restaurants, Quick Service etc.).

- Visitor Attractions
 - Historical Properties/Gardens
 - Museums/Galleries
 - Zoos/Wildlife
 - Theme Parks
- Entertainment
 - Theatres
 - Cinemas
 - Gambling
 - Sport Events/Race Tracks
- Clubs
 - Health Clubs & Fitness Centres
 - Leisure & Sport Centres
 - Sport & Social Clubs
- Events and Mobile Caterers
 - Events Caterers
 - Mobile Caterers
 - Mobile Film Caterers
- On Board Travel
 - Airline Catering
 - Ferry Catering
 - Rail Catering
 - Bus & Coach Catering

Note: Each port, station, etc. is counted as a single outlet. This categorisation can cause difficulties when examining location, group and outlet size distribution. Hence, outlet numbers for on board travel should be used with care

Staff Catering

Feeding employees at the place of work including government locations as well as Business and Industry.

Note: Staff Catering excludes vending

- Self-Run Canteens
- Contracted Canteens
- National Government Canteens
- Local Authority Canteens/Civic Centres
- Off Shore Catering

Health Care

Outlets whose main focus is providing health care (including short- and long-stay care).

Note: This sector includes meals served to patients, staff and visitors.

- State
 - Hospitals
 - Specialised Hospitals
 - Day Hospitals
 - Special/MoD Hospitals
- Independent
 - Independent Hospitals
 - Private Residential Nursing Homes
 - Registered Private Homes
- Care Homes
 - Voluntary Residential Nursing Homes
 - Registered Voluntary Homes
 - Local Authority Homes

Education

Outlets which are primarily concerned with educating children or adults (or both)

Note: When an establishment has more than one site or includes different colleges, only one outlet is counted.

- State Schools
 - Nursery Schools
 - Primary Schools
 - Secondary Schools
 - Special Schools

Note: Where an establishment includes two levels of schools (e.g. nursery and primary), we count one school under each of the categories.
- Independent Schools
 - Private Day Schools
 - Private Boarding Schools

Note: When a boarding school offers the choice of a day or boarding facility, the school has been counted under boarding school.

- Further/Higher Education
 - Further Education
Note: Further education colleges cannot award degrees
 - Universities
Note: Includes universities, university colleges and colleges and institutes which are part of a university
 - Other Higher Education
Note: Higher education colleges can award degrees

Services

Outlets which provide a publicly-funded service and which are not health care or educational establishments.

- Governmental services
 - Police Stations
 - Note: Meals that are not eaten on the premises are included
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 - Fire Stations
 - Armed Forces
 - Prisons
 - Young Offenders Institutions
 - Note: Young Offenders Institutions are only counted separately when they are not part of a prison.
- Welfare
 - Welfare Services
Note: Includes meals on wheels, luncheon clubs and day centres. The number of outlets corresponds to the number of local social services authorities.
 - Voluntary Services
Note: This includes Red Cross, soup kitchens etc.

Temperatures

Ambient

Food that is stored at ambient temperatures such as glass, cans, dehydrated etc. Includes hot beverages but not cold beverages

Chilled long-life

Food that is stored at chilled temperatures with a shelf life of at least 8 days

Chilled short-life

Food that is stored at chilled temperatures with a shelf life of no more than 8 days Includes bread/morning goods, eggs as well as meat, fish, produce, milk

Frozen

Food that is stored below 0°C

Distribution Channels

Delivered Wholesalers

Foodservice delivered wholesalers (such as 3663, Brakes) including broadline, multi-temp and single temp wholesalers Specialist product delivered wholesalers such as produce, fish, cheese, coffee, snacks wholesalers and including Catering butchers

Cash and Carry

Outlets offering a “supermarket” service for foodservice operators (and generally other retailers). Some cash and carry operators also offer a delivered service

Contract Distributors

Specialist companies (including divisions of delivered wholesalers) that supply specific contracts which are generally negotiated directly between operators and manufacturers In-house distribution (such as Keystone Foods)

Retailers and Others

- Supermarkets
- Other retailers
- Fresh produce and other markets
- Farms
- Direct supply by manufacturers

Countries

- Albania
- Austria
- Belarus
- Belgium
- Bosnia and Herzegovina
- Bulgaria
- Croatia
- Cyprus
- Czech
- Denmark
- Estonia
- Finland
- France
- Germany
- Greece
- Hungary
- Iceland
- Ireland
- Italy
- Latvia
- Lithuania
- Luxembourg
- Macedonia
- Malta
- Moldova
- Montenegro
- Netherlands
- Norway
- Poland
- Portugal
- Romania
- Russia
- Serbia
- Slovakia
- Slovenia
- Spain
- Sweden
- Switzerland
- Turkey
- Ukraine
- United Kingdom

Regions (UK only)

London

South East

- Berkshire
- Buckinghamshire
- East Sussex
- Hampshire
- Isle of Wight
- Kent
- Oxfordshire
- Surrey
- West Sussex

South West

- Avon
- Cornwall
- Devon
- Dorset
- Gloucestershire
- Somerset
- Wiltshire

East

- Bedfordshire
- Cambridgeshire
- Essex
- Hertfordshire
- Norfolk
- Suffolk

East Midlands

- Derbyshire
- Leicestershire
- Lincolnshire
- Northamptonshire
- Nottinghamshire

West Midlands

- Hereford & Worcester
- Shropshire
- Staffordshire
- Warwickshire
- West Midlands

Yorkshire & Humberside

- Humberside
- North Yorkshire
- South Yorkshire
- West Yorkshire

North West & Merseyside

- Cheshire
- Cumbria
- Greater Manchester
- Lancashire
- Merseyside

North East

- Cleveland
- Durham
- Northumberland
- Tyne & Wear

Wales

- Clwyd
- Dyfed
- Gwent
- Gwynedd
- Mid Glamorgan
- Powys
- South Glamorgan
- West Glamorgan

Scotland

- Borders
- Central
- Dumfries & Galloway
- Fife
- Grampian
- Highland
- Lothian
- Strathclyde
- Tayside
- Islands

Northern Ireland

- Antrim
- Armagh
- Down
- Fermanagh
- Londonderry
- Tyrone

Metrics / Market Measures

Food Purchases

The value of food and hot beverages (but not cold beverages) purchased by caterers. Food Purchases are measured at caterers' buying prices (i.e. including any distributors' margin) and exclude VAT

Food Sales

The value of food and hot beverages (but not cold beverages) sold by caterers to their customers at customers' purchasing prices excluding VAT

Mark up

The amount by which food and/or beverage purchases are multiplied in order to arrive at the selling price

Meal

A transaction of at least two food items, at least one of which is unwrapped

Note: This excludes confectionery, packeted snacks and vended products

Outlet

The number of units that serve meals

Note: Where there are a number of units on leisure, hotel or cost sector sites, we count this as a single outlet.

All outlets on a "closed site" are counted as a single "unit". A "closed site" is one where an entry fee or membership is required in order to gain access

Each outlet on an "open site" is counted as a single "unit". No entry fee or membership is required to gain access to an "open site"

Terms

Alcohol

Beer, wines and spirits that are consumed with food

Breakfast

A meal, that is not a snack, taken between 4am and 10am

C-Store

Includes branded convenience stores that serve and sell food

Concession

An area within a non-foodservice location which is leased to a third party to provide foodservice to the public. The concessionaire usually ensures that there are no directly competing outlets within the concession area

Contracted

An outlet managed by an outside organisation
Note: This excludes concessions

Dinner

A meal, that is not a snack, taken between 6pm and 1am
Note: Meals that are not snacks, taken between 1am and 4am are either dinner or breakfast depending on the nature of the food served

Forecourts

Include those that serve and sell food, but excludes forecourts that only sell fuel

Group

An organisation which owns and/or manages 5 or more outlets. Local/Government Authority and the NHS have also been classified as groups
Note: This excludes consortia but includes franchised and tenanted outlets

Independent

An outlet that is not part of a group

Lunch

A meal, that is not a snack, taken between 12am and 2pm

Meal

A transaction of at least two food items, at least one of which is unwrapped

Note: This excludes confectionery, vending and packets of snacks

Retail

Includes those outlets that sell but do not serve food.

Note: In-store catering is included within Restaurants.

Outlet Size Distribution

Outlets are distributed according to the following size categories:

- >10 Fewer than 10,000 meals per annum
- 10-30 10,001 - 29,999 meals per annum
- 30-100 30,000 -100,000 meals per annum
- >100 More than 100,000 meals per annum

Snack

A snack is a meal that is not consumed at times defined for breakfast, lunch or dinner

Soft Drinks

Cold, non-alcoholic beverages that are consumed with food

Turnover

Contract caterers' income; turnover includes sales of food and beverages to customers, subsidies paid by clients, overrides and other payments from suppliers