



# THE CHIEF DATA OFFICER FOR EMEA'S RESTAURANT INDUSTRY

Company Profile | 2024

London, UK | Dubai, UAE | Karachi, Pakistan

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[www.mingora.org](http://www.mingora.org)



# MINGORA IS THE **CHIEF DATA OFFICER** FOR THE EMEA FOODSERVICE INDUSTRY

Mingora is a pioneering **data solutions provider** specializing in the foodservice industry across EMEA.

Our platform brings clarity to a traditionally 'data dark' sector, enabling businesses to make multi-billion dollar decisions with confidence.



# OUR DATA IS DRIVING YOUR **MILLION DOLLAR** DECISIONS

## Market Size Trends

The Food Panel tracks the evolving size of the foodservice market, helping companies identify growth opportunities and prioritize high-potential segments.



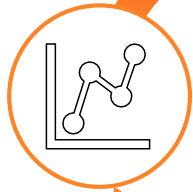
## Channel and Occasion Breakdown

Data spanning multiple channels and dining occasions offers a granular view into when, where, and why consumers make purchasing decisions.



## Sales Performance Insights

Detailed sales data by segment and category empower brands to benchmark performance and adjust strategies in real time



## Consumer Behavior Analysis

In-depth understanding of purchase triggers, motivations, and barriers drives informed product innovation and marketing strategies.



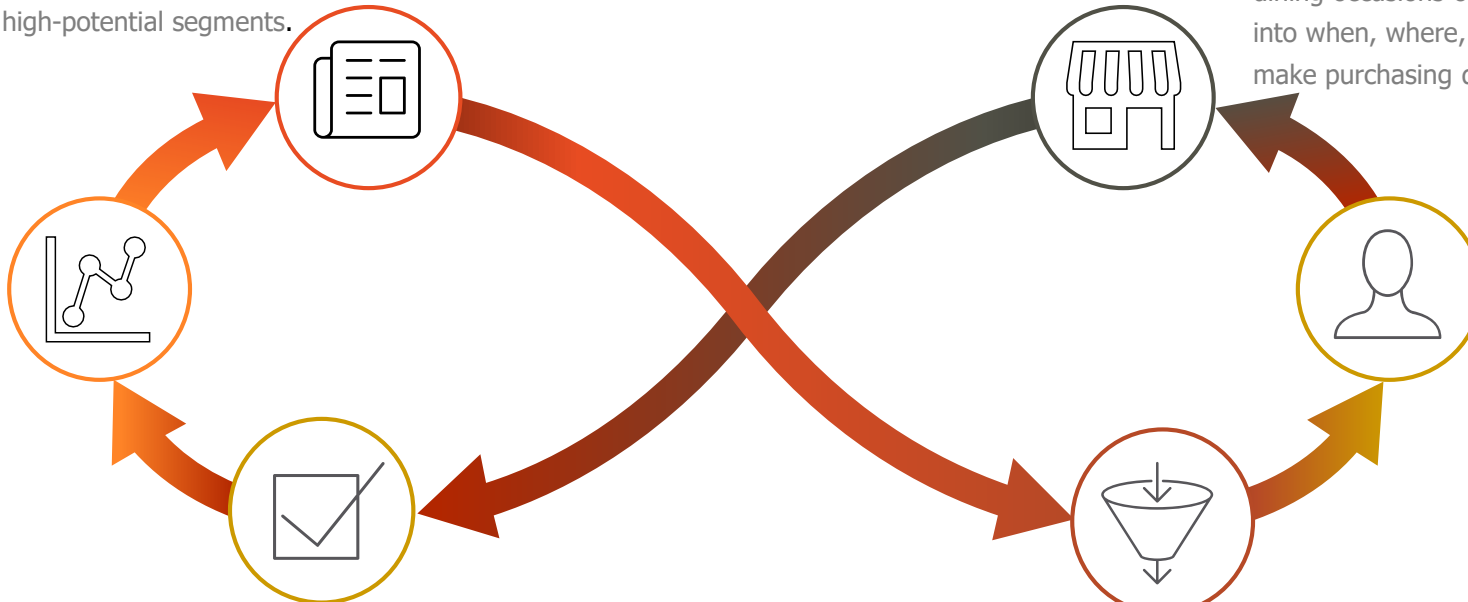
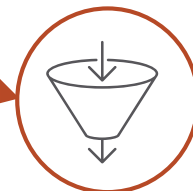
## Brand Share Dynamics

The panel's brand-level tracking enables companies to see shifts in market share across outlets, providing clarity on competitive positioning.



## Consumer Confidence Survey

It provides valuable insights into consumer sentiment, capturing perspectives on economic conditions, purchasing power, and future expectations



# WE BUILD OUR PRODUCTS & SERVICES WITH WORLD'S BEST COMPANIES

Exclusive EMEA/MENA rights for products and services (Licensed or Own)



US-based Global Foodservice Expert and one of world's largest market intelligence companies with presence in 23 countries and 1,600+ employees



North America's leading restaurant franchising and retail leasing operators with footprint across US, Europe and MENA.



Switzerland-based Strategic Consulting Group serving and partnering with world's leading international organization



India-based award-winning Digital Market Research product and solutions company with presence in 38 countries

# EXPANDING PRODUCT OFFERINGS & BUILDING A UNIFIED DATA PLATFORM



INDUSTRY



COMPETITOR

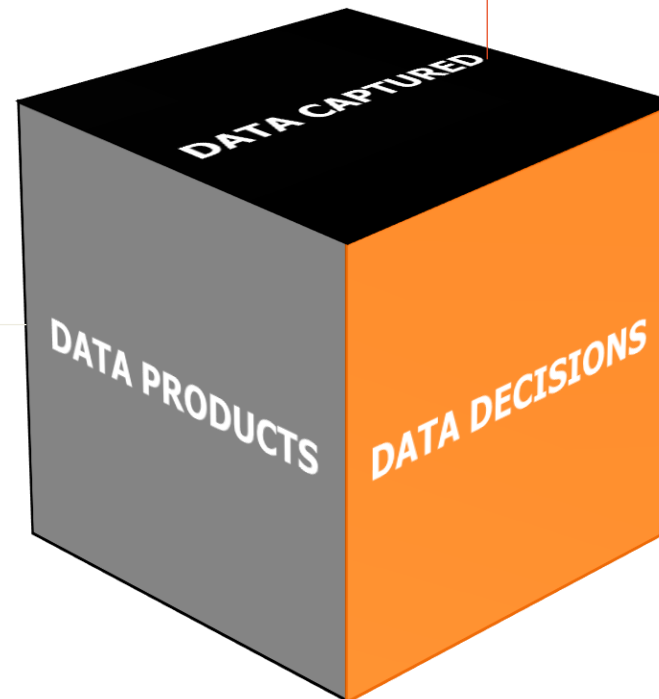


CONSUMER

**60,000** restaurants distribution  
**1,500+** operators providing data

- ✓ **NPD - Mingora SalesTrack®**
- ✓ **Food Panel Track**
- ✓ **Mingora Advisory**

**60+** subscriptions  
**10 million+** data points  
**2** exclusive global partnerships



**CEOs | CXOs | Managers | Analysts**

Investment, P&L, Growth, Acquisition, People,  
Supply Chain, Operation, Product & Store  
Development

**200+** CXOs using our data on weekly  
basis to drive decisions

# **The Food Panel: Your Gateway to Actionable Data**



# MINGORA FOOD PANEL

Quarterly Market & segment sizes, shares, consumer behavior & menu trends

60,000+ Consumers

10 Million Data Points a Year

All Sectors

2 Markets - UAE & KSA

2 Quarters/Year

25+ Subscribers



# YOUR **ONE-STOP PLATFORM** FOR REAL-TIME FOODSERVICE INSIGHTS

## **Comprehensive Shopper Behavior Data**

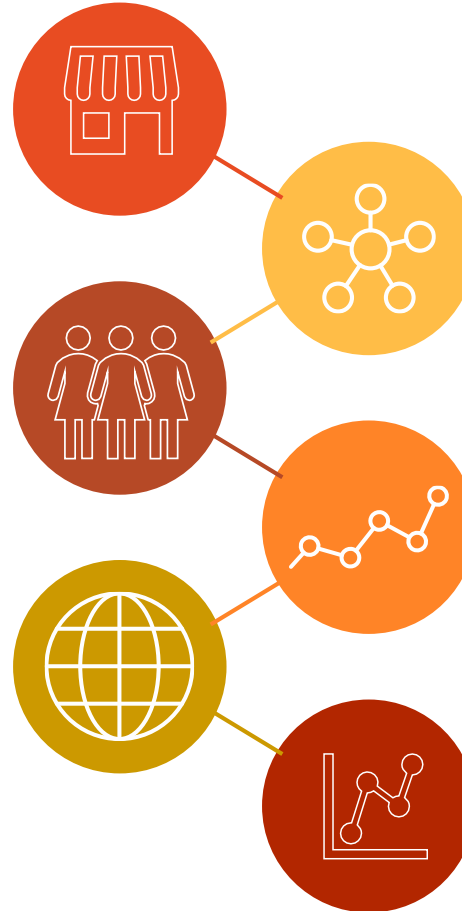
Captures food and beverage purchases using a 'day-after' recall questionnaire across multiple outlets (restaurants, coffee shops, retail, etc.).

## **Competitor & Consumer Behavior Analysis**

Understand why consumers choose your chain or product over competitors.

## **Consumer Eating Habits**

Track changes in consumers' eating habits away from home



## **Market Structure & Sales Insights**

Access real data to understand market structure, sales, and segment sizes.

## **Product & Usage Insights**

Gain insights into the importance, usage, and combinations of products and product groups.

## **Strategic Planning Tool**

A key resource for strategic planning and identifying growth opportunities.



# FOOD PANEL METHODOLOGY

Q1 2024 (5-Jan to 20-Mar)  
Field Periods

Representative living population aged 16 to 59  
Sample Structure

Kids have been reported through accompanying adults.  
Inclusion of Kids



## Data Collection Method

Collected via Online Questionnaire emailed to 16,634 panelists

## Consumption Reporting

Panelists reported on prior day's consumption of ready prepared food and beverages

## Population Projection for Market Estimation

Data projected to represent living population (16-59), estimating the Q1'24 annual market size.

Sample

# FOOD PANEL SAMPLE STRUCTURE

Age	Population
15-18	2%
19-24	16%
25-34	45%
35-44	25%
45-59	12%
Gender	Population
Males	62%
Females	38%
Nationality	Population
Local Saudi	70%
Expat Arab	23%
Asian Expat_Westerners_And_Others	7%
Days	%
Sunday	14.20%
Monday	14.32%
Tuesday	14.10%
Wednesday	14.44%
Thursday	14.27%
Friday	14.45%
Saturday	14.21%
MHI	Population
Less than SAR 5,000	11%
SAR 5,000 - SAR 10,000	21%
SAR 10,001 - SAR 20,000	28%
SAR 20,001 - SAR 30,000	20%
SAR 30,001 - SAR 40,000	11%
SAR 40,001 - SAR 60,000	7%
More than SAR 60,000	3%

Cities that we covered				Region	Food Panel Coverage
Riyadh	Al-Kharj	Dawadmi	Al-Majma'ah	Riyadh Region	37%
	Taif	Jeddah	Makkah	Makkah region	33%
	Hofuf	Jubail	Dammam	Eastern region	12%
			Madina	Al Madinah region	6%
			Buraidah	Al Qassim region	2%
		Abha	Khamis	Asir region	4%
Other				Al Bahah region	2%
				Al Jawf region	
				Hail region	
				Jizan region	
			Najran	Najran region	2%
			Tabuk	Tabuk Region	2%

# FOOD PANEL KEY PERFORMANCE INDICATORS

## Scenario 1

Dad orders a combo - burger, fries, Cola  
 One kid orders a kid's meal - nuggets, fries, Cola  
 Other kid only orders a sandwich

Respondent



**Paid  
AED/SAR 60**

Total Spends/Sales = 60

Menu Servings = 7

No of Tickets/Transactions = 1

No of Visits = 3

Average Ticket = 60

Average Check = 20

No. of combos = 2

Combo Incidence =  $2/3 = 67\%$

Incidence of Cola =  $2/3 = 67\%$

Serving % of Cola =  $2/7 = 29\%$

## Scenario 2

Group orders a group meal - 4 burgers, 4 fries, 1 Large Cola Bottle and a dessert  
 Respondent eats 1 burger, 1 fries, 1 Cola and helps herself to a dessert

Respondent



**Paid  
AED/SAR 60**

Total Spends/Sales = 60

Menu Servings = 4

No of Tickets/Transactions = 1

No of Visits = 1

Average Ticket = 60

Average Check = 15

No. of combos = 1

Combo Incidence =  $1/1 = 100\%$

Incidence of Cola =  $1/1 = 100\%$

Serving % of Cola =  $1/4 = 25\%$

# CHANNEL COVERAGE



## **FAST FOOD/FAST CASUAL**

Fast Food Restaurants (Burger places, Sandwich places, etc), Fast Casual Places



## **CASUAL DINING**

Restaurant with table service but rather moderate prices and casual ambiance



## **LEISURE/ ENTERTAINMENT**

Coffee Bar, Tea Shop, Café, Ice Cream Shop, Cinema, Sheesha Place, Bar



## **FINE DINING/HOTEL**

Fine Dining Restaurant, Hotel Restaurant



## **TRADITIONAL**

Bokhari, Shwaya, Mandi, Bofia (buffet), Street Canteen, Local Shawarma/ Snack Shop



## **RETAIL/GASTRO HYBRID**

Bakeries, C-Stores, Grocery Stores, Kiosks for ready prepared food/beverages for immediate consumption



## **OTHER QUICK SERVICE**

Food Stands, Juice Bars, On-Board Catering, Street Vendors

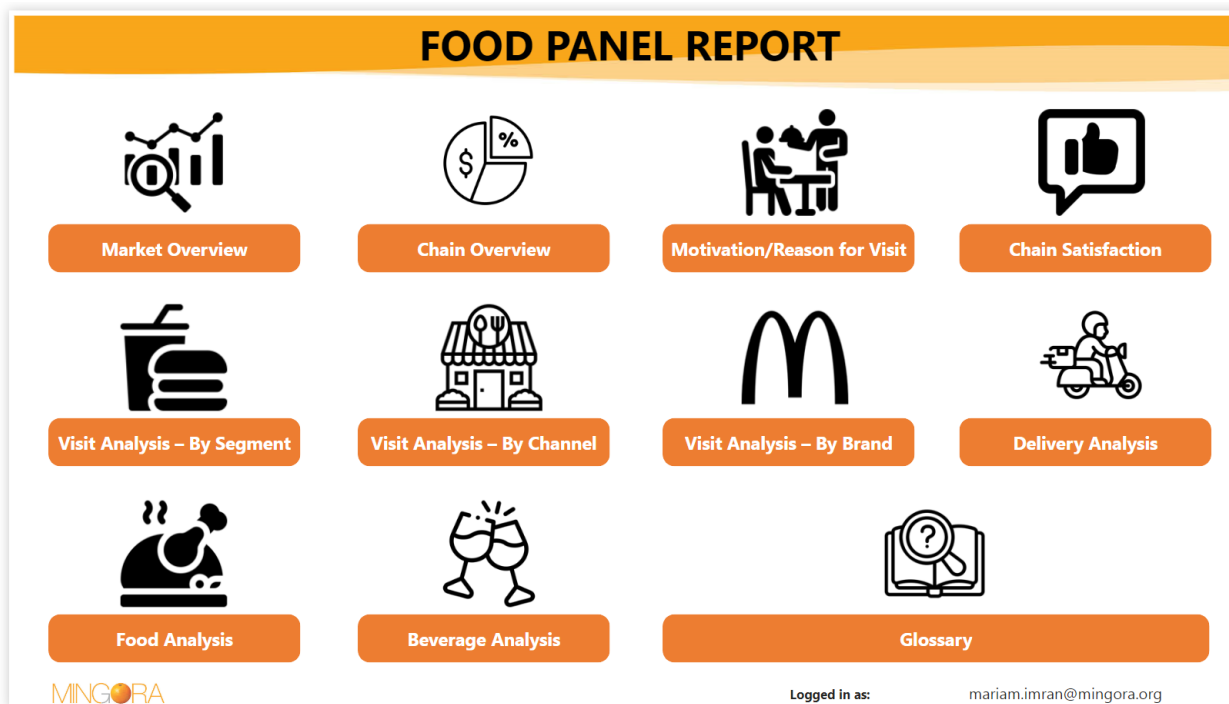


## **WORKPLACE/SCHOOL CAFETERIA**

Workplace Cafeteria, School Cafeteria, Vending Machines at Workplace or School

**Our Dashboard: Your  
Live Data Hub for  
Smarter Decisions**

# FOOD PANEL FULLY AUTOMATED DASHBOARD



## TRY OUR DEMO DASHBOARD HERE!

Access a demo version of Mingora's Food Panel dashboard and explore how it delivers real-time insights into consumer behavior.

### Access the Dashboard

Email us [mariam.imran@mingora.org](mailto:mariam.imran@mingora.org) to access the dashboard

*Please note: The data displayed is for demonstration purposes only and is intended to provide a sample of the Food Panel's capabilities.*



# MARKET OVERVIEW



## Market Size

KSA

UAE

**i** Detail View

Growth Calc: Annual Growth vs. Last Year (LY);  
Quarterly Growth vs. Same Quarter Last Year (SQ LY)

Period

Annually

Visits

Sales

Tickets

Avg. Tickets

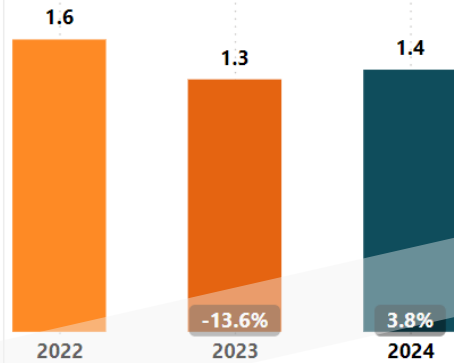
Avg. Eater Check

Visits/Capita

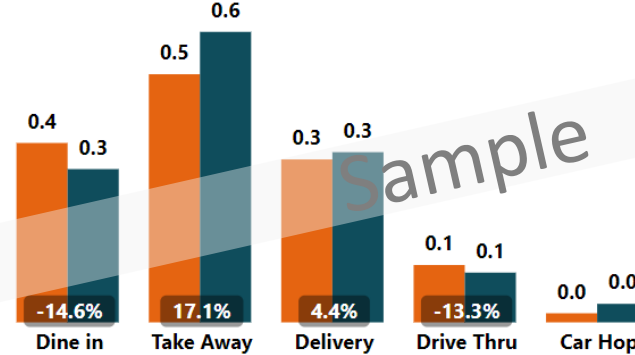
Spend/Capita

Legend: ● 2023 ● 2024 ● Growth LY

**Total Market Size**  
Visits (in Billion)



**Type of Services Channel**  
Visits (in Billion)



Period

Annually

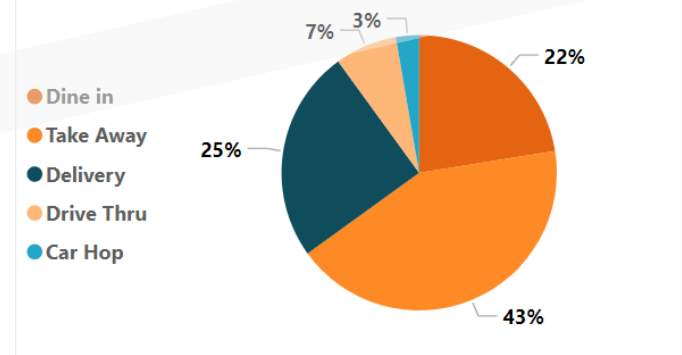
Annually

2024

Visits %

Spend %

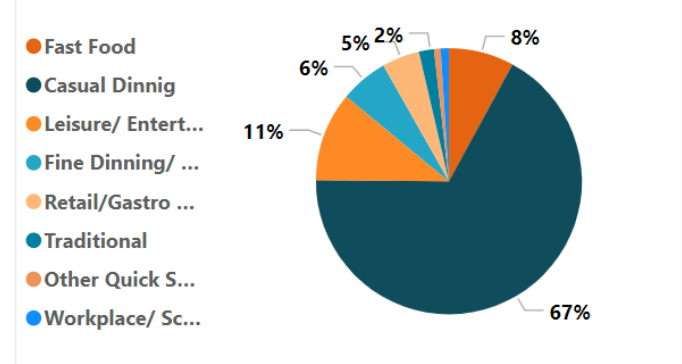
**Type of Services (C)**



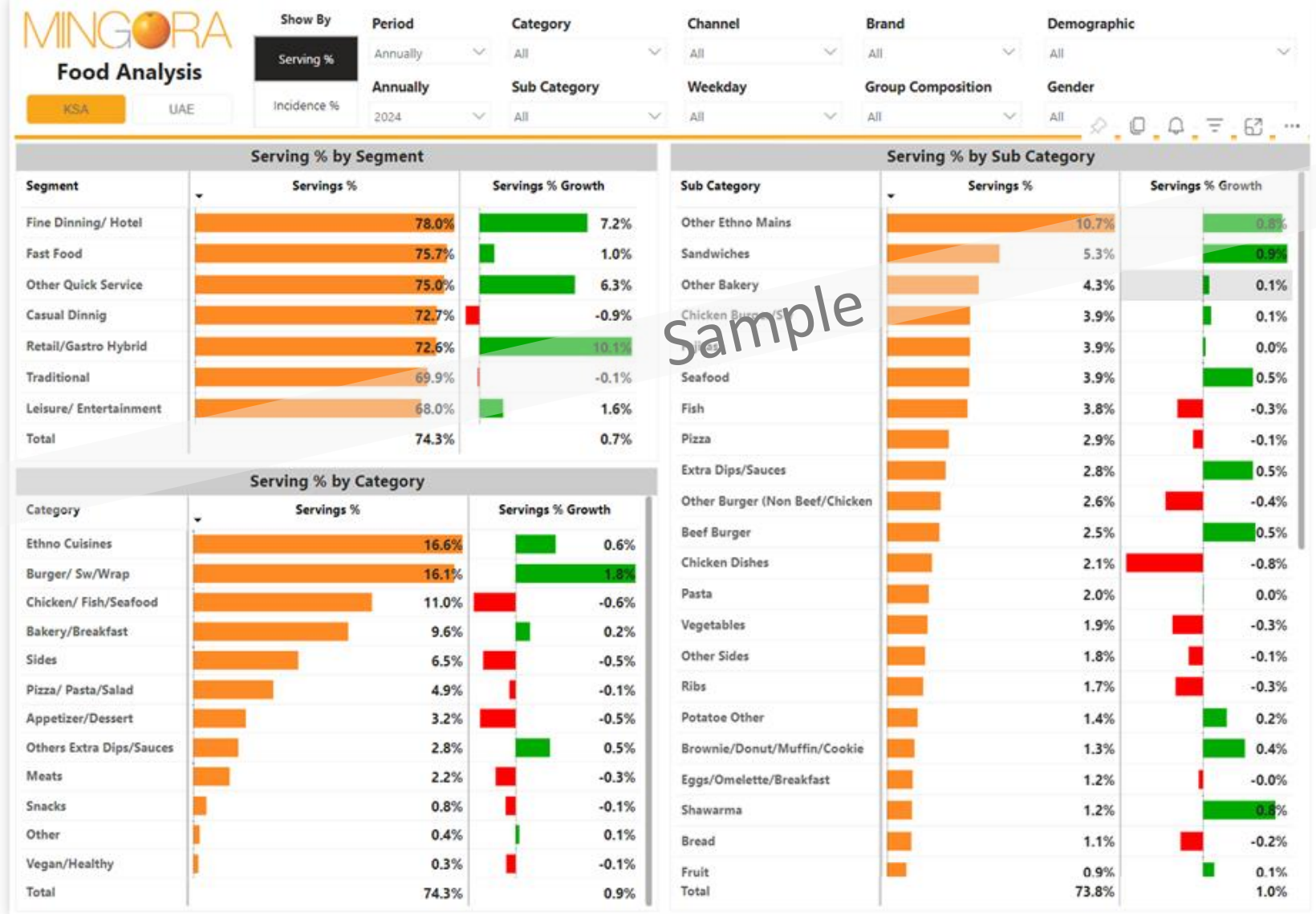
**Segments Chart**  
Visits (in Billion)



**Segment %**



# MENU ANALYSIS



# CHAIN VIEW



## Chain View

Show By

Bar View Table View

**Detail View**

KSA

UAE

Segment

- Casual Dining
- Fast Food
- Fine Dining/Hotel
- Leisure/Entertai...
- Other Quick Ser...
- Retail/Gastro Hy...
- Traditional

Period

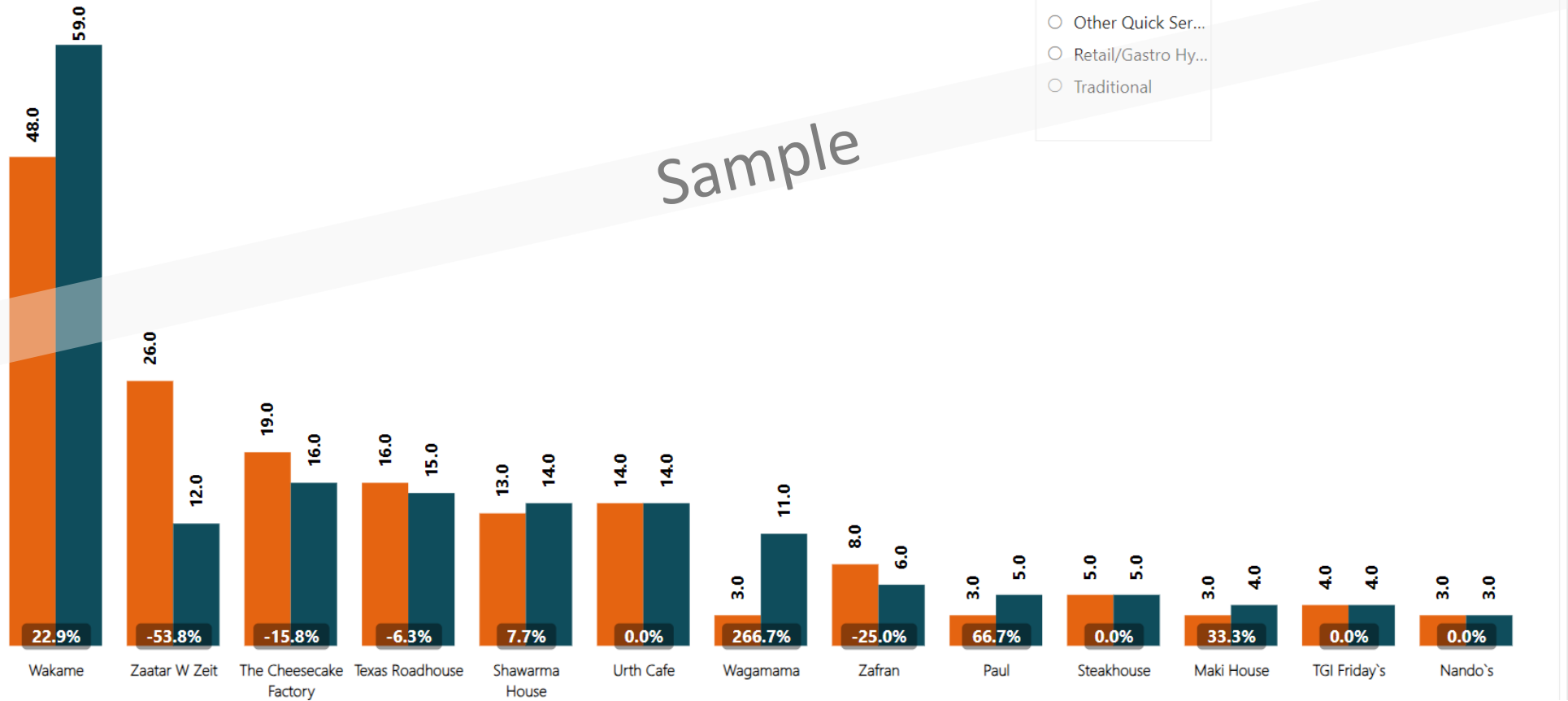
Annually

Annually

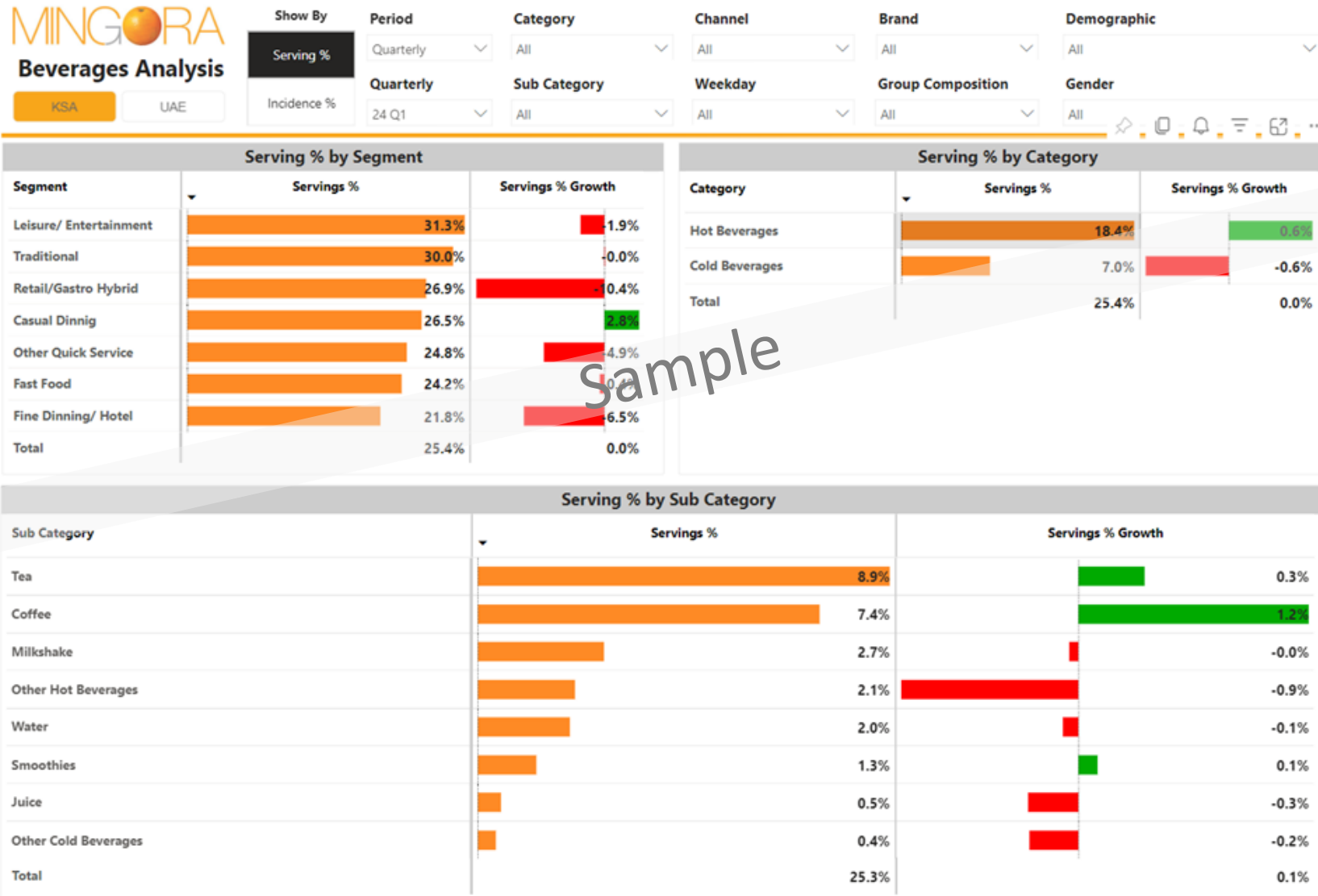
Multiple sele...

Total Store Count Total Spend Total Transaction Total Visits Avg. Check Par d/Store (in LC) Spend/Store (in USD)

### Total Store Count



# BEVERAGE ANALYSIS



# MOTIVATION / REASONS



## Motivation / Reasons

Year: 2024 | Quarter: All | Segment: All | Channel: All | Day Parts: All | Group Composition: All  
 Brand: KSA | UAE | Weekday: All | Gender: All | Kids: All | Nationality: All

### Motivation for Visit %

To Treat Someone Else/Kids	Chill out/ Go to a cool place	Had a Specific Craving	Could Not/Did Not Want t...	Business Meal with Cl...	Because of...	Needed a...
13.2%	8.8%	6.1%	5.4%	4.4%	3.3%	3.2%
To Treat Myself	Eat as a family	to satisfy hunger or thirst	To Socialize with Friends	Leisure Activity	Fitted In With A S...	Be...
11.2%	7.4%	5.9%	4.9%	4.4%	3.1%	1....
		Meal/Snack at Work	Dining as a couple	A Celebration	A school/universi...	
		5.6%	4.7%	3.9%	2.6%	

### Reasons for Visit %

Had previous positive ex...	Food arrives fast	I had a coupon or a ...	I like the atmosphere there	It is a local business	Was recommende...	Is a fami...	is easy ...	I had li...
7.4%	6.6%	6.4%	6.0%	5.2%	4.5%	3.4%	3.1%	3.0%
Read Positive Reviews	Offers wide variety of ...	Offers good price/val...	Wanted something different or...	Kids like it there	It is conveniently L...	Offers a specific m...	Other...	
6.9%	6.4%	6.1%	5.9%	5.0%	3.5%	2.4%	2.1%	
			One of my favorite brands	Has high quality of Food	Has healthy offerin...	Has high quality of...		
			5.6%	4.7%	3.4%	2.4%		



# VISIT ANALYSIS – BY SEGMENT



## Visits Analysis – By Segments

Show By

Annually

Quarterly

Year

2024

KSA

UAE

Segment

All

Brand

All

Search

- Select all
- Al Baik
- Al Tazaj
- Automatic Restau...
- Baskin Robbins
- Burger King
- Costa Coffee

Channel

All

Weekday

All

Age

All

Gender

All

Day Parts

All

Kids

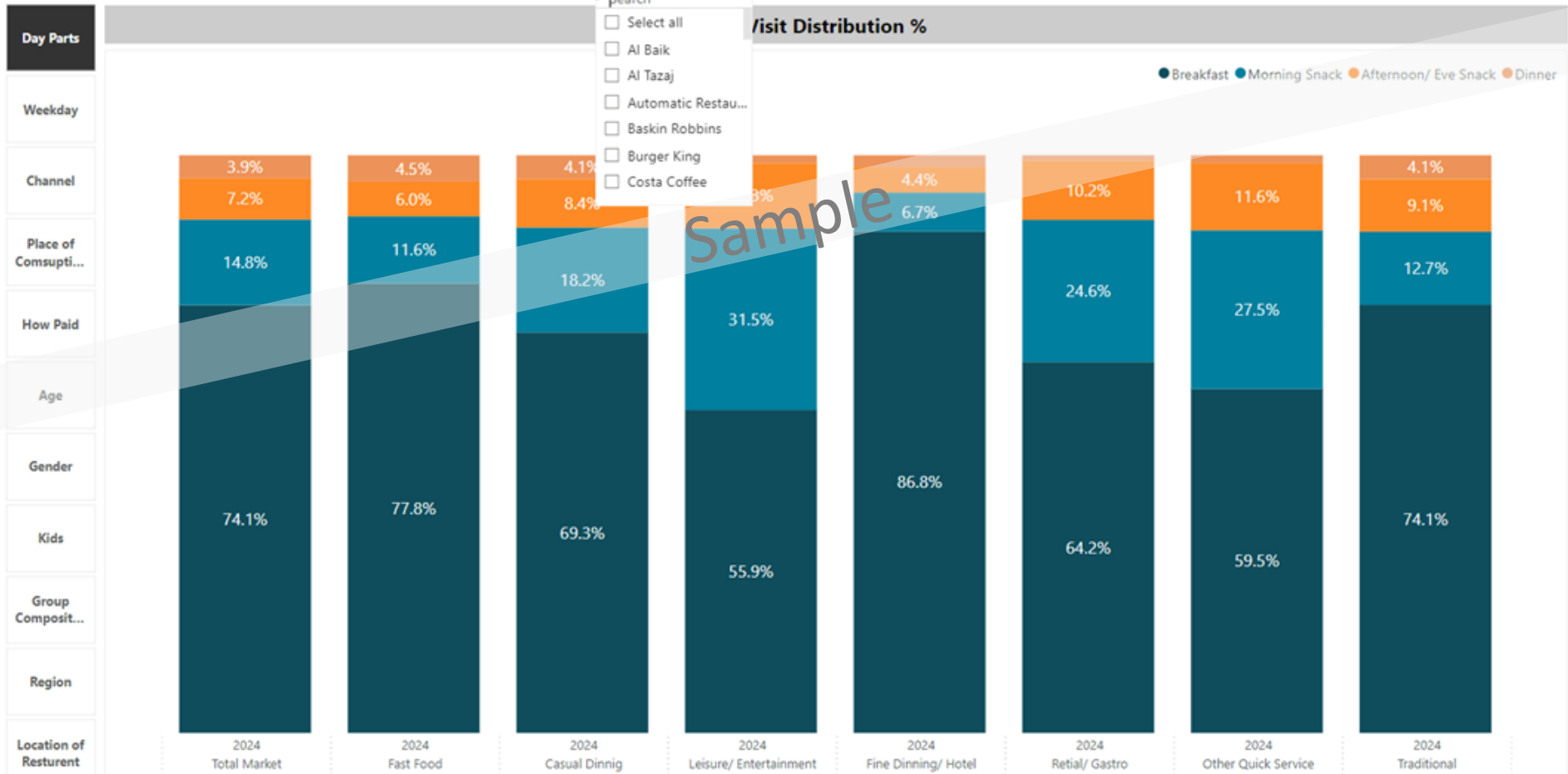
All

Group Composition

All

Nationality

All





# VISIT ANALYSIS – BY CHANNEL



## Visits Analysis – By Channels

Show By

Annually

Quarterly

Year

2024

KSA

UAE

Segment

All

Brand

All

Channel

All

Weekday

All

Age

All

Gender

All

Day Parts

All

Kids

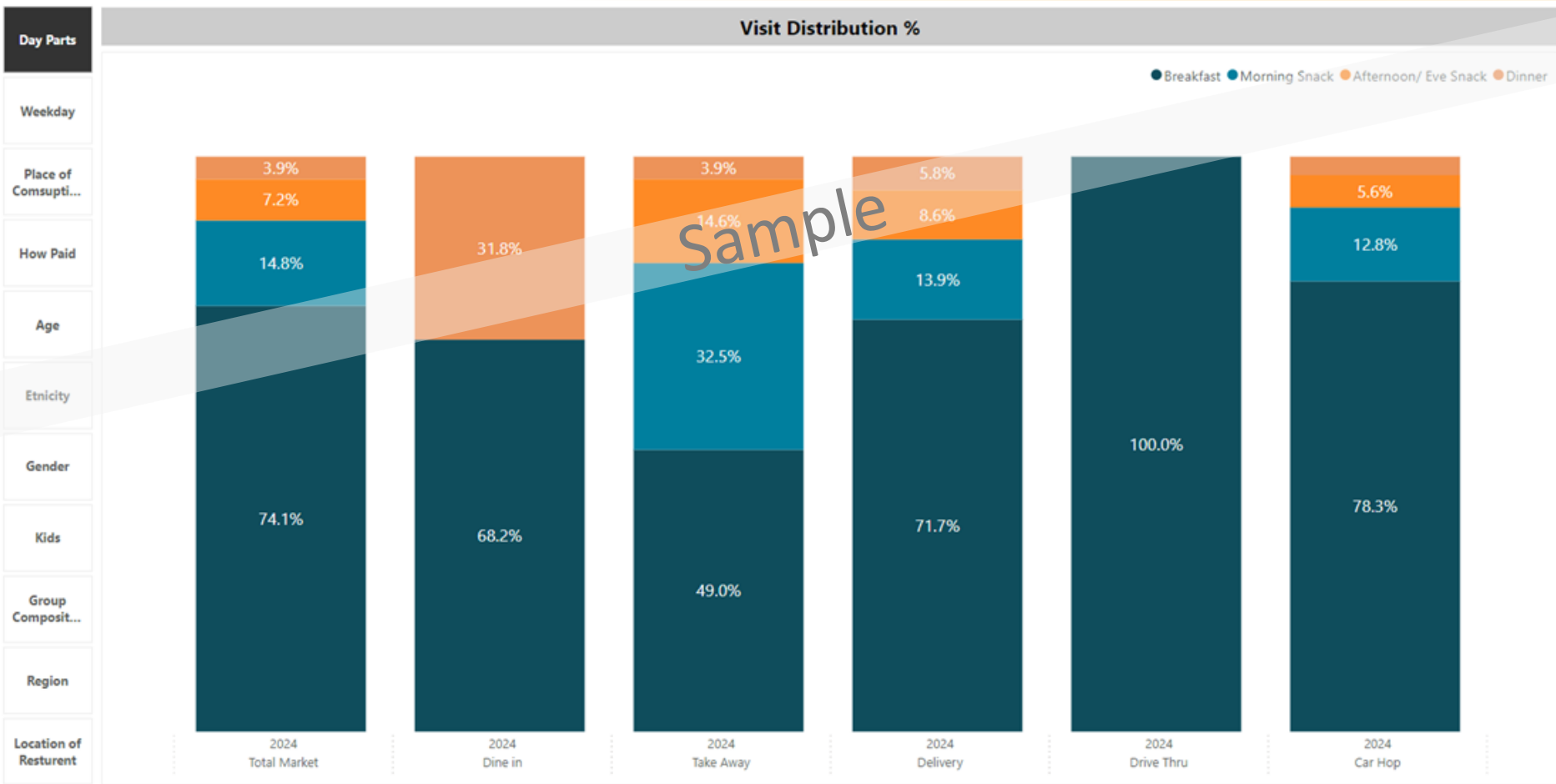
All

Group Composition

All

Nationality

All



# VISIT ANALYSIS – BY BRAND



## Visits Analysis – By Brand

Show By

Annually

Quarterly

Year

2024

KSA

UAE

Segment

Casual

Brand

All

Search

- Select all
- Maki House
- Nando's
- Paul
- Shawarma House
- Steakhouse
- Texas Roadhouse

Channel

All

Weekday

All

Age

All

Gender

All

Day Parts

All

Kids

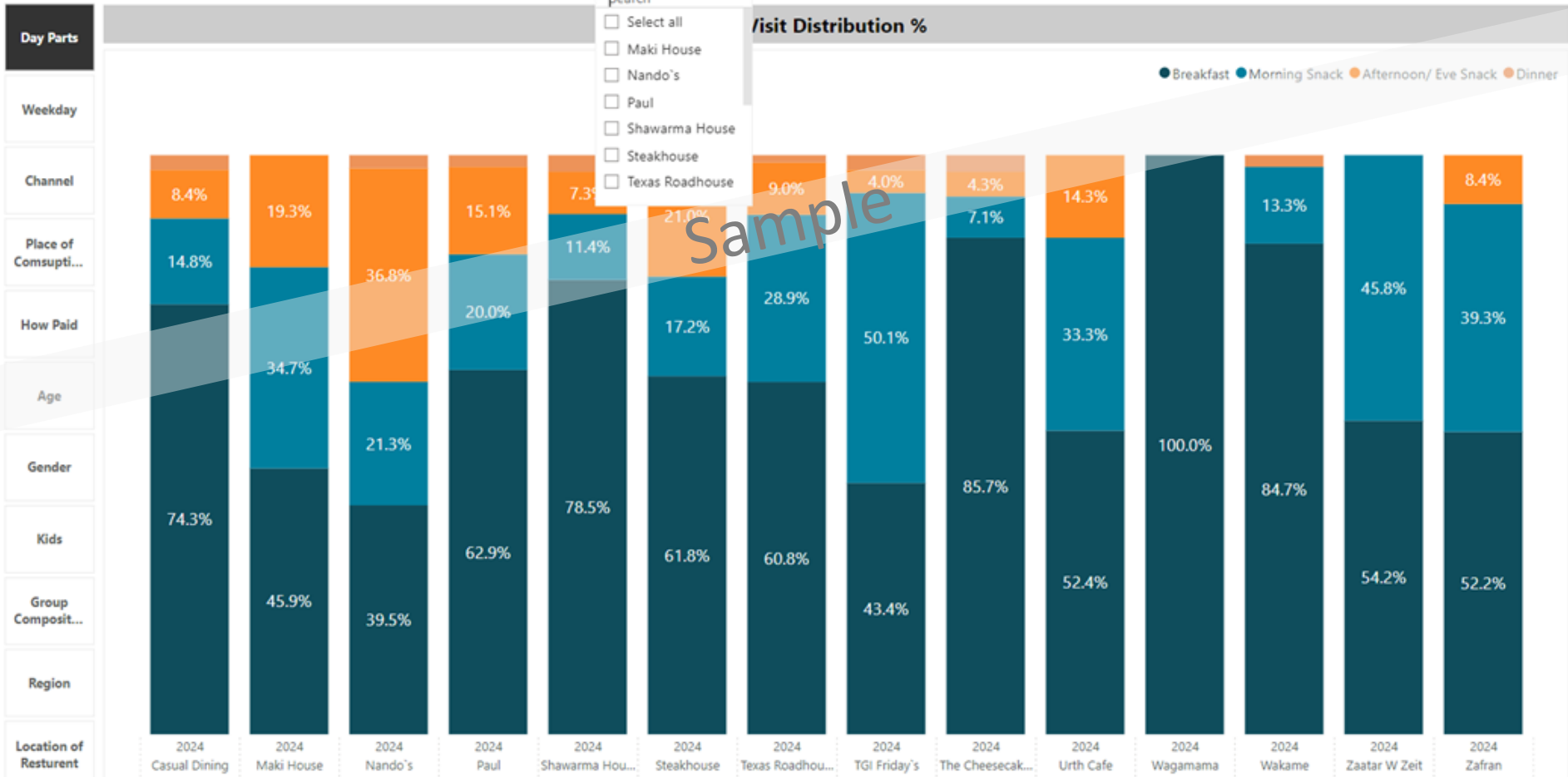
All

Group Composition

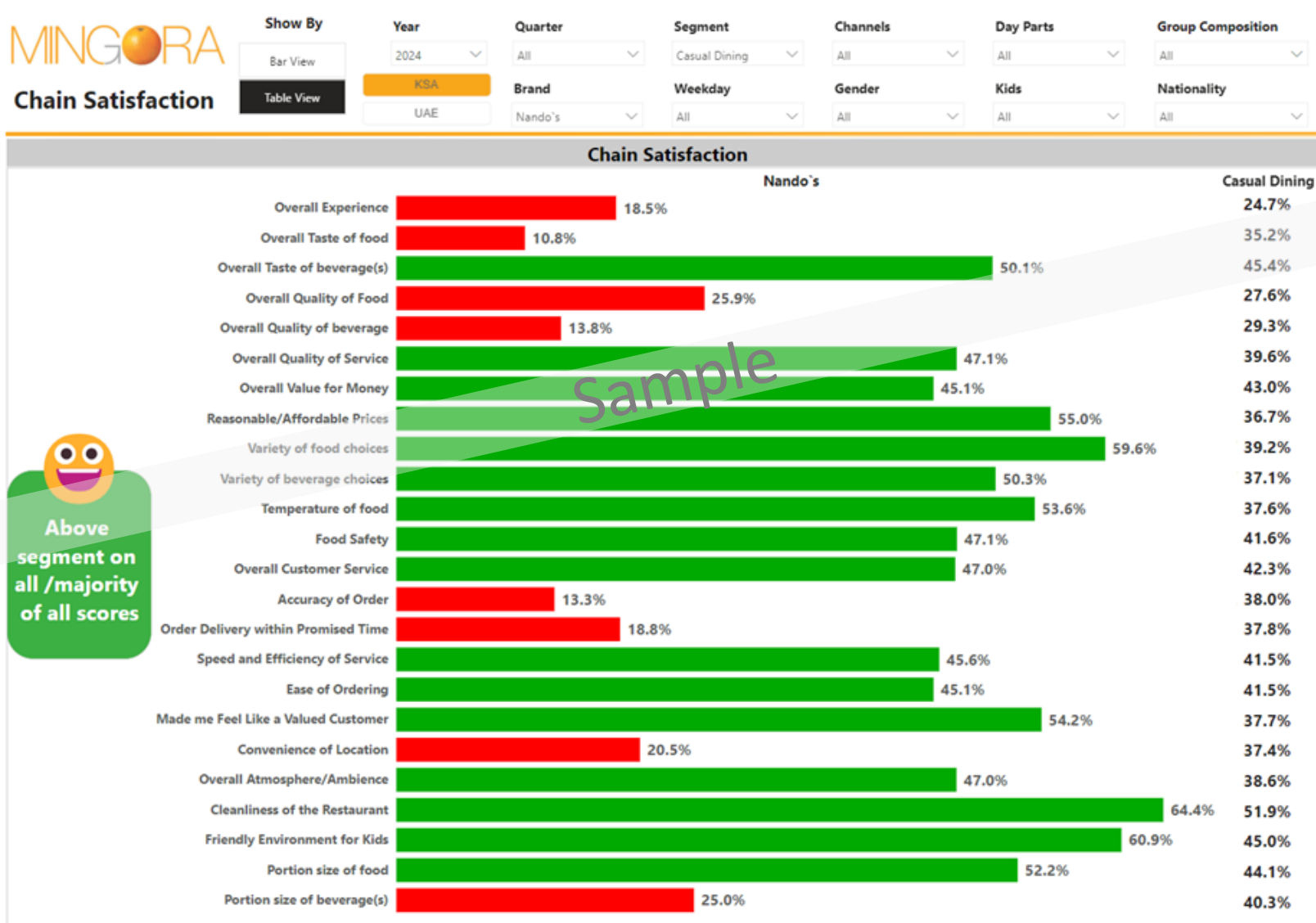
All

Nationality

All



# CHAIN SATISFACTION

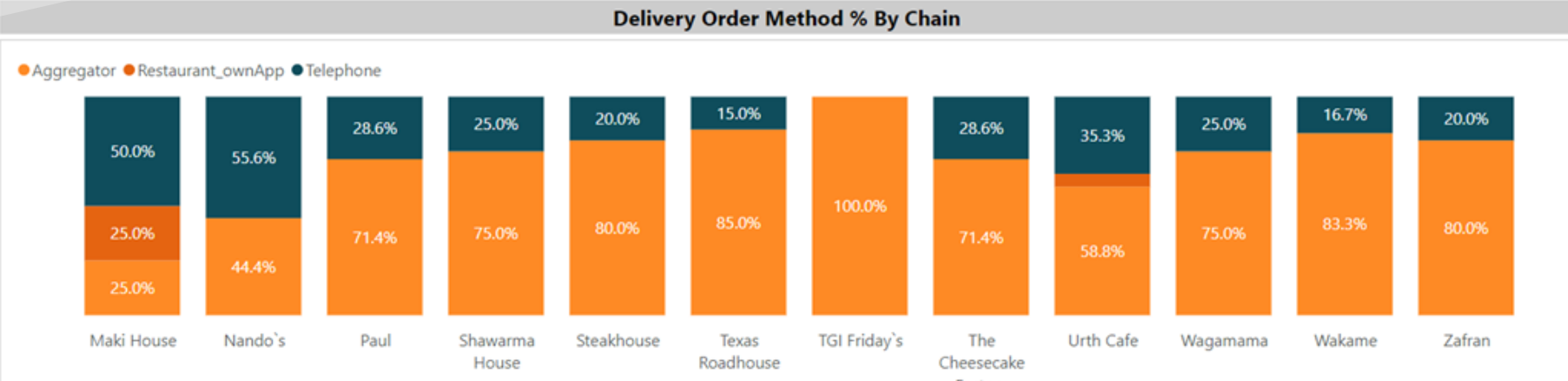
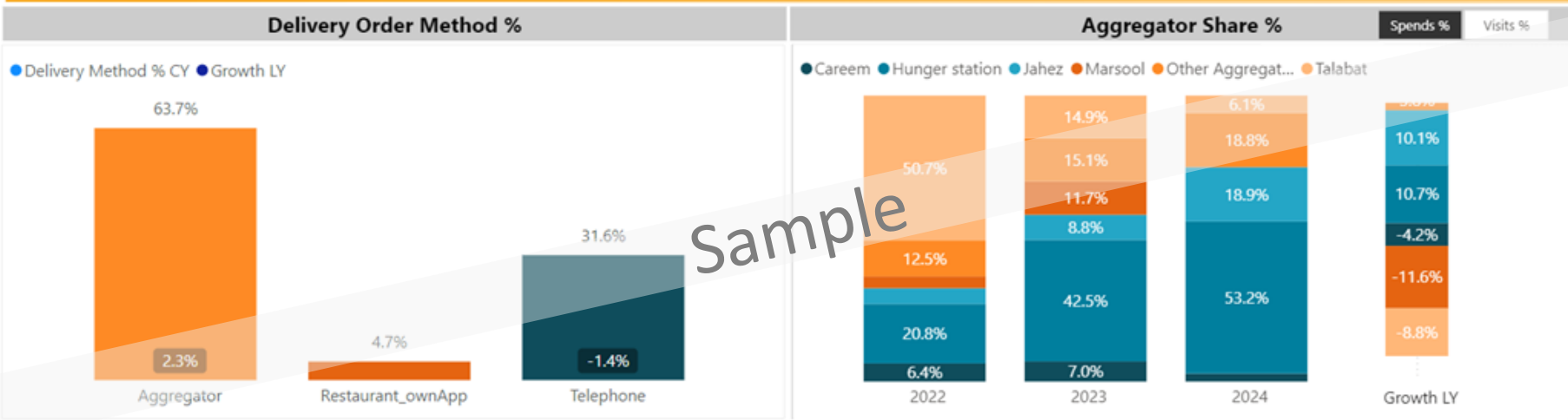


# DELIVERY CHANNEL DEEP DIVE

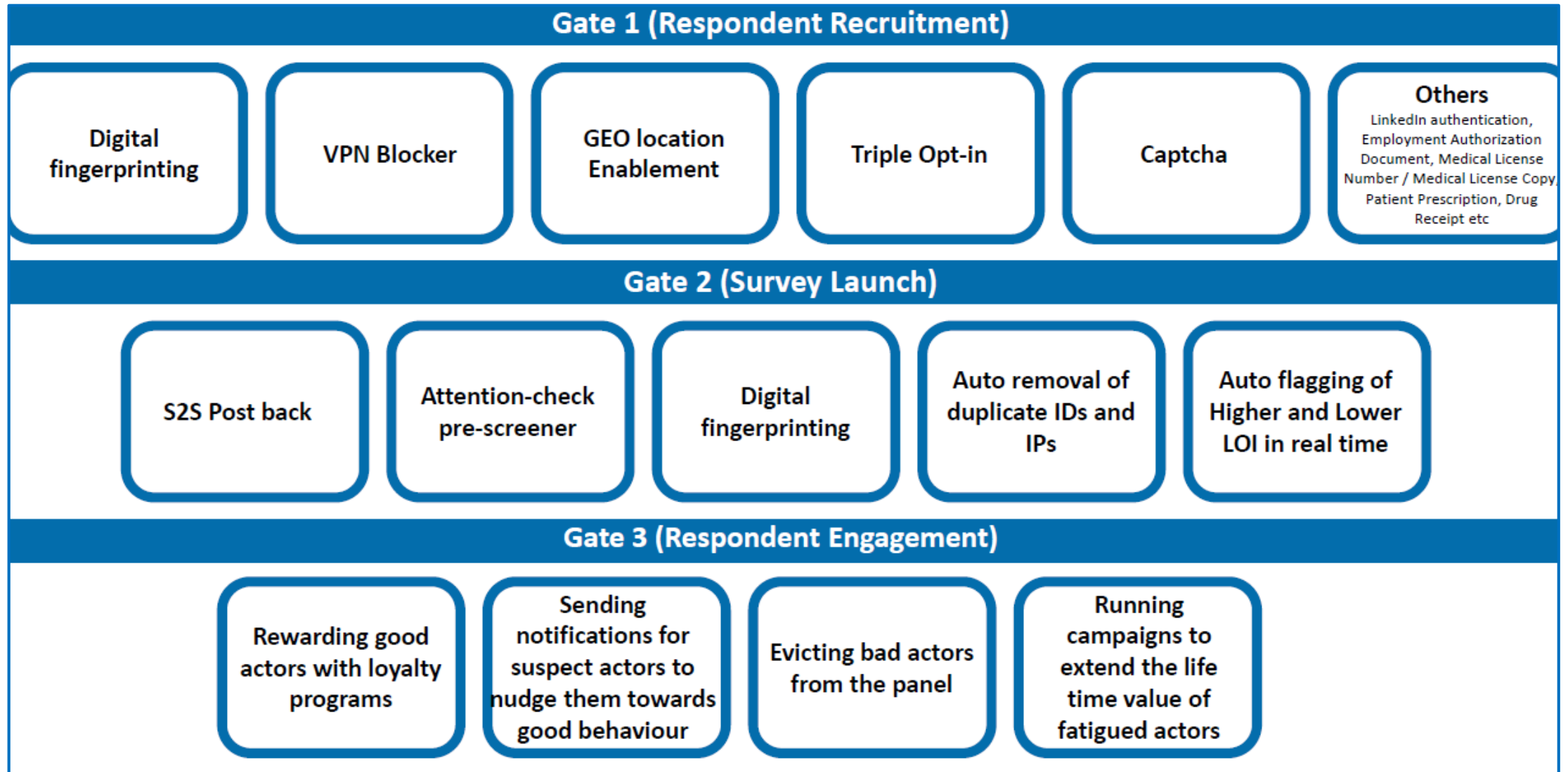


## Delivery Channel Deep Dive

Year: 2024 | Quarter: Q1 | Segment: Casual Dining | Channels: All | Day Parts: All | Group Composition: All  
 Brand: KSA | UAE | Weekday: All | Gender: All | Kids: All | Nationality: All



# FOOD PANEL QUALITY ASSURANCE PROCESS



# FOOD PANEL IN PARTNERSHIP WITH



Redefining Reach and Insights

We maintain the highest standards of data security, backed by **ISO27001 Information Security Management System certification.**

Key measures include:

- Regular audits and security training
- Restricted access and secure file transfers
- Double-password protection and predefined IP login protocols

**Your data is protected with robust systems and processes you can trust.**





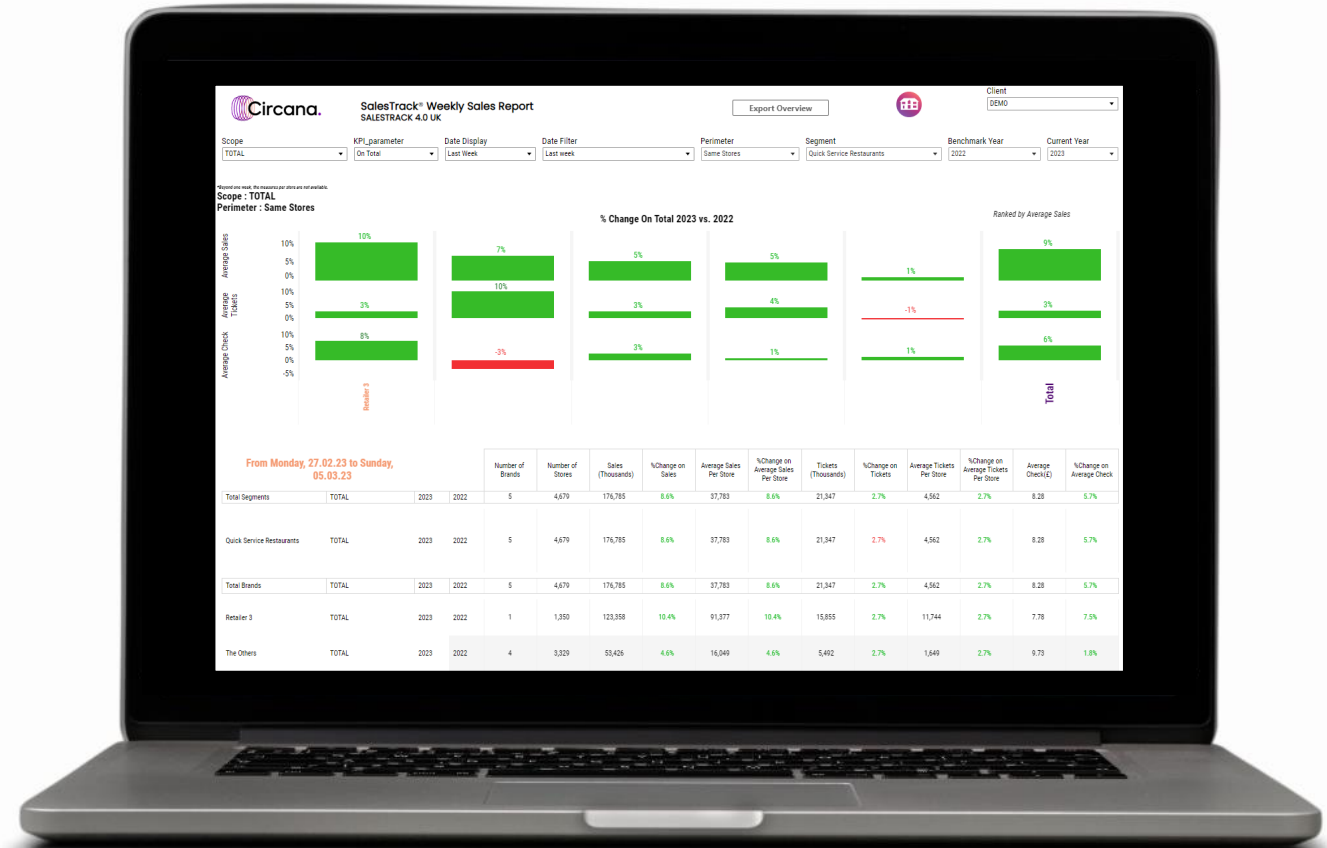
**SalesTrack<sup>®</sup> - A**  
**foodservice industry**  
**barometer**

# MINGORA SALESTRACK® IN PARTNERSHIP WITH



Weekly Restaurant Sales Tracker based on actual chain data

- 1,600+** | Restaurants Weekly
- 52** | Weeks a Year
- Select** | Market Segments
- 2** | Markets - UAE & KSA
- Special** | Deep Dives
- 35+** | Subscribers



# WEEKLY INSIGHTS: MEASURE YOUR PERFORMANCE AND COMPETITIVE IMPACT

We collect sales and transaction information directly from chain restaurants. Aggregated information is summarized in a report and sent to participating chain restaurants.

## 01 SALES DECOMPOSITION

Understand if ticket count or ticket value are driving sales changes in the market



## 02 STORE EFFICIENCY

Compare per store sales and ticket counts for your brand versus the market

Me vs Rest of Market

Average Sales Per Store	%Change on Average Sales Per Store
55,736	-11.7%

## 03 ABSOLUTE TICKET VALUE

Benchmark ticket value versus competitors to help inform pricing strategies

 \$7.25 vs \$8.50

## 04 CUSTOMIZABLE WEEKS

Drill into specific weeks to focus on initiatives and events of interest

- W14/23 (02.04.23-08.04.23)
- W15/23 (09.04.23-15.04.23)
- W16/23 (16.04.23-22.04.23)
- W17/23 (23.04.23-29.04.23)
- W18/23 (30.04.23-06.05.23)
- W19/23 (07.05.23-13.05.23)

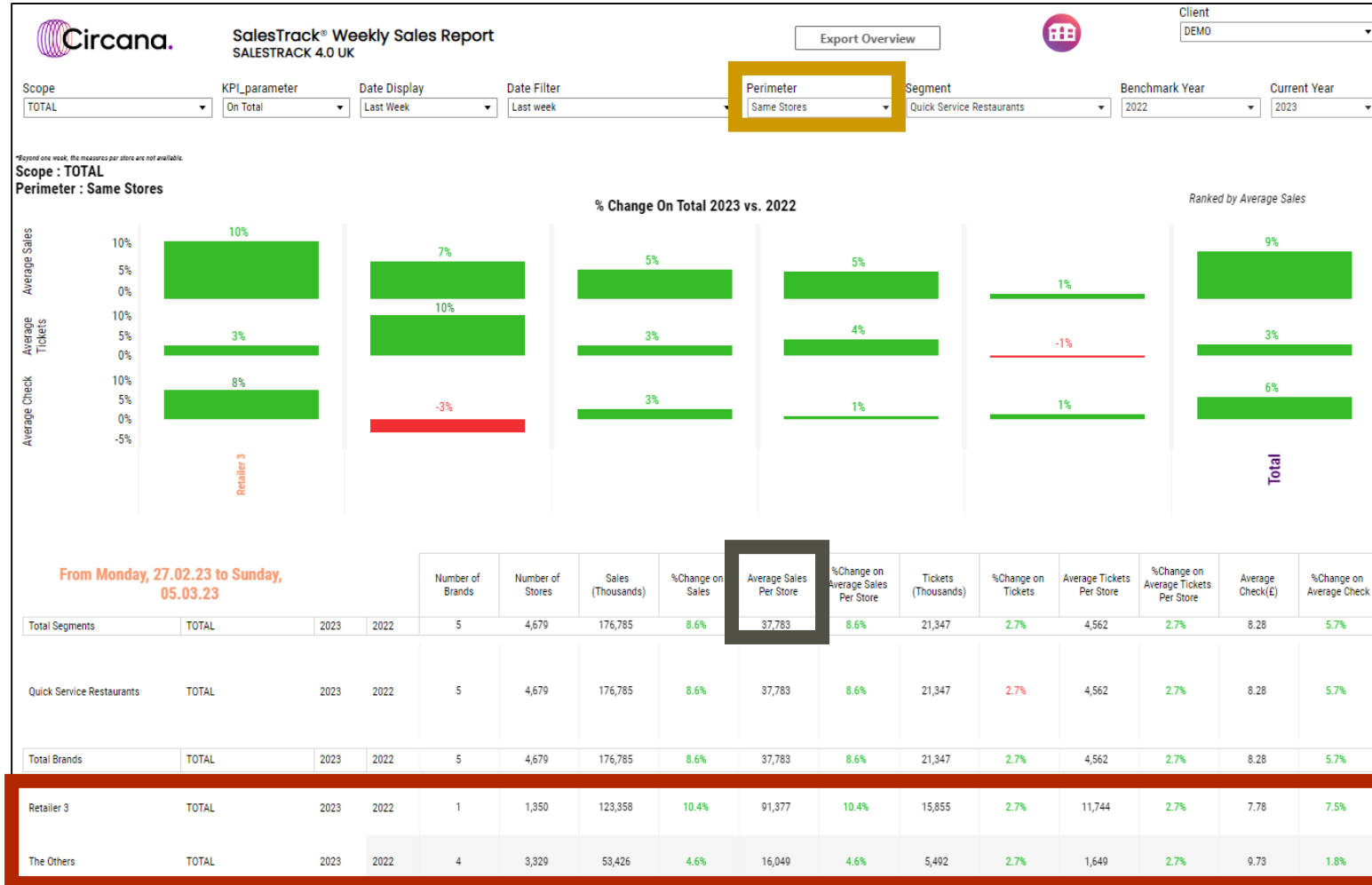
## 05 REAL-TIME POS

Powered by weekly POS data from participating chains

 200 Chains Worldwide

# **SalesTrack<sup>®</sup>: Dashboard & Analysis**

# ME VS REST OF MARKET

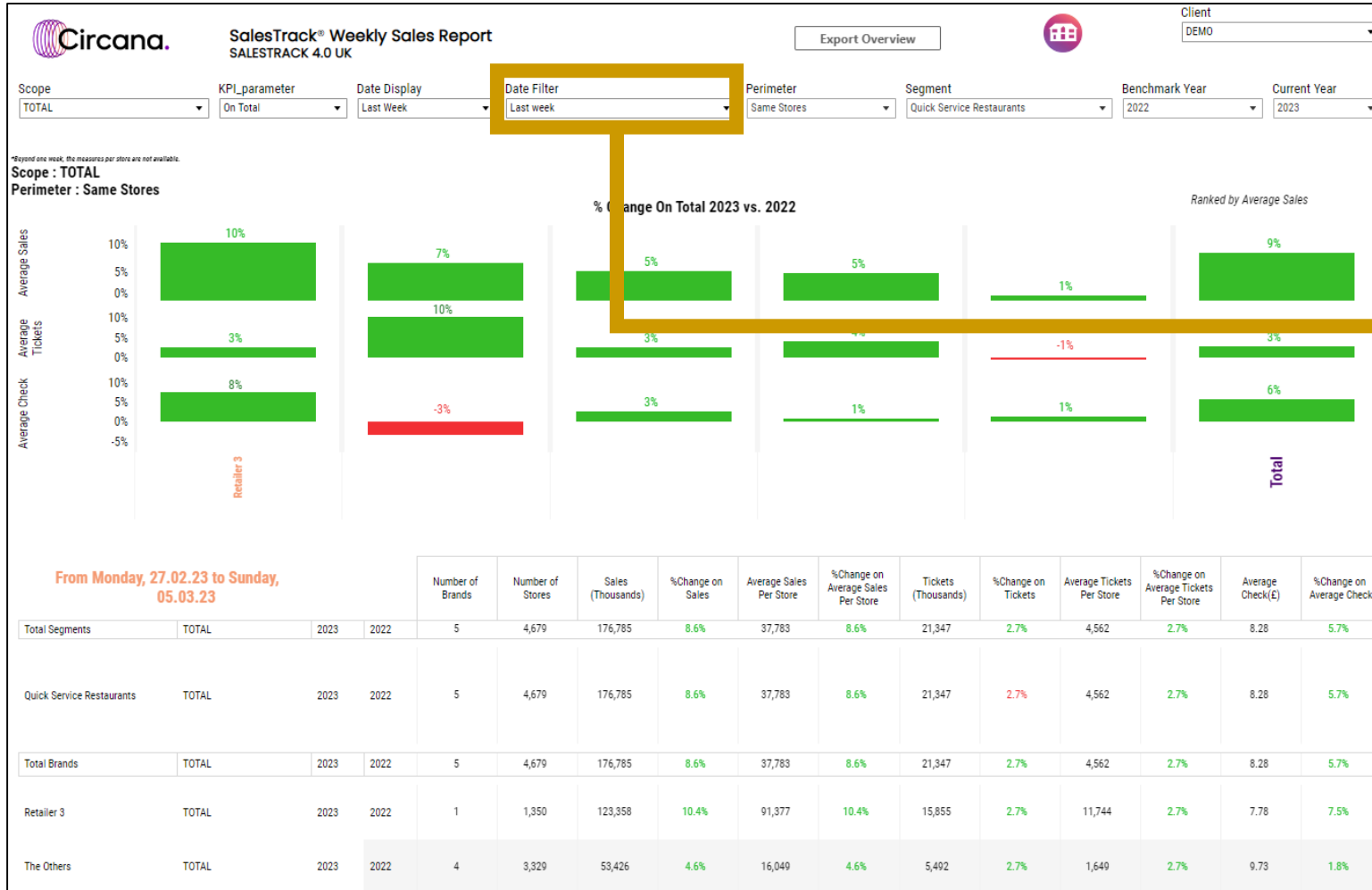


Same Store

Absolute Numbers

Me vs Rest of Market

# CUSTOMIZABLE TIME PERIOD



Customizable time periods

**Date Filter**

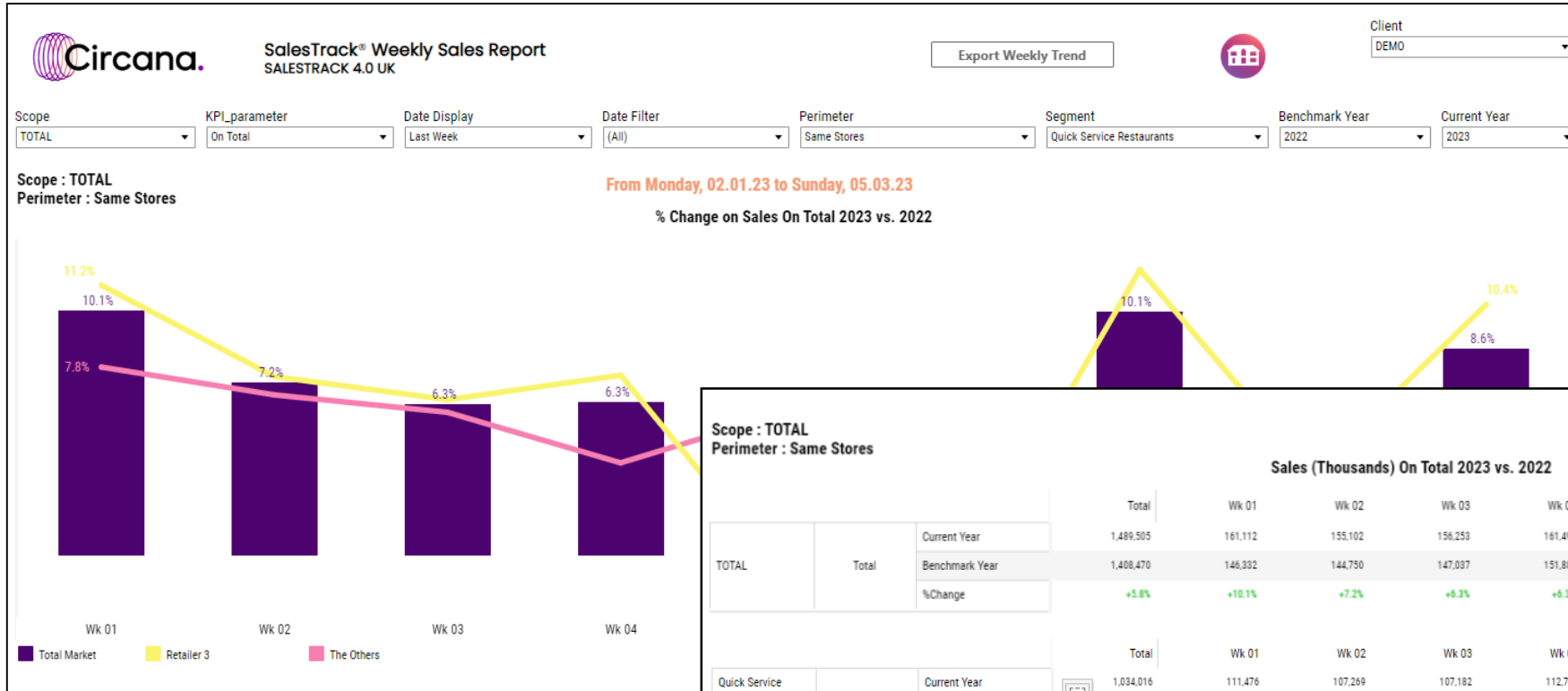
(All)

- (All)
- W01/23 (02.01.23-08.01.23)
- W02/23 (09.01.23-15.01.23)
- W03/23 (16.01.23-22.01.23)
- W04/23 (23.01.23-29.01.23)
- W05/23 (30.01.23-05.02.23)
- W06/23 (06.02.23-12.02.23)
- W07/23 (13.02.23-19.02.23)
- W08/23 (20.02.23-26.02.23)
- W09/23 (27.02.23-05.03.23)



# TRENDED VIEW

Me vs  
Rest of Market



Scope : TOTAL  
Perimeter : Same Stores

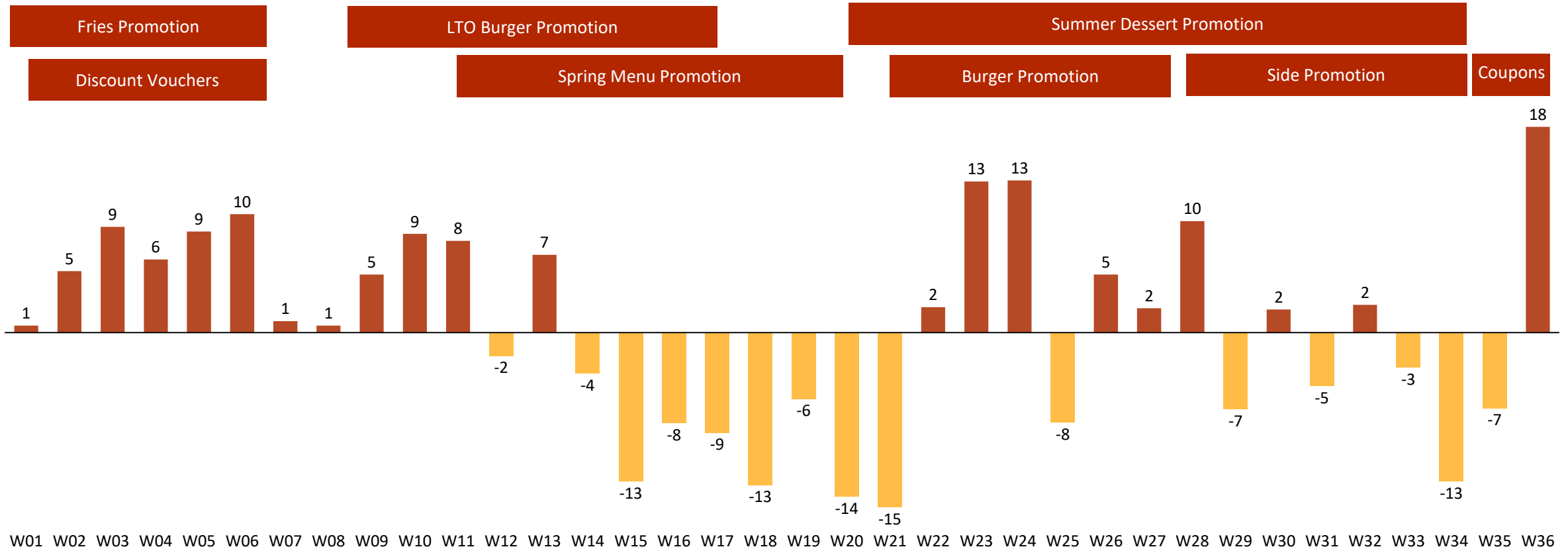
Sales (Thousands) On Total 2023 vs. 2022

			Total	Wk 01	Wk 02	Wk 03	Wk 04	Wk 05	Wk 06	Wk 07	Wk 08	Wk 09
TOTAL	Total	Current Year	1,489,505	161,112	155,102	156,253	161,494	165,553	162,356	177,531	173,319	176,785
		Benchmark Year	1,408,470	146,332	144,750	147,037	151,889	164,142	160,980	161,288	169,195	162,857
		%Change	+5.8%	+10.1%	+7.2%	+6.3%	+6.3%	+0.9%	+0.9%	+10.1%	+2.4%	+8.6%
Quick Service Restaurants	Retailer 3	Current Year	1,034,016	111,476	107,269	107,182	112,730	114,871	111,969	124,027	121,134	123,358
		Benchmark Year	974,643	100,280	99,891	100,703	104,920	116,323	112,659	110,929	117,165	111,773
		%Change	+6.1%	+11.2%	+7.4%	+6.4%	+7.4%	-1.2%	-0.6%	+11.8%	+3.4%	+10.4%
	The Others	Current Year	455,489	49,636	47,833	49,072	48,765	50,682	50,386	53,504	52,185	53,426
		Benchmark Year	433,826	46,052	44,859	46,333	46,969	47,819	48,321	50,359	52,030	51,084
		%Change	+5.0%	+7.8%	+6.6%	+5.9%	+3.8%	+6.0%	+4.3%	+6.2%	+0.3%	+4.6%

# ANALYSIS: GAP VS COMPETITORS

Identify initiatives that coincided with market over/under performance

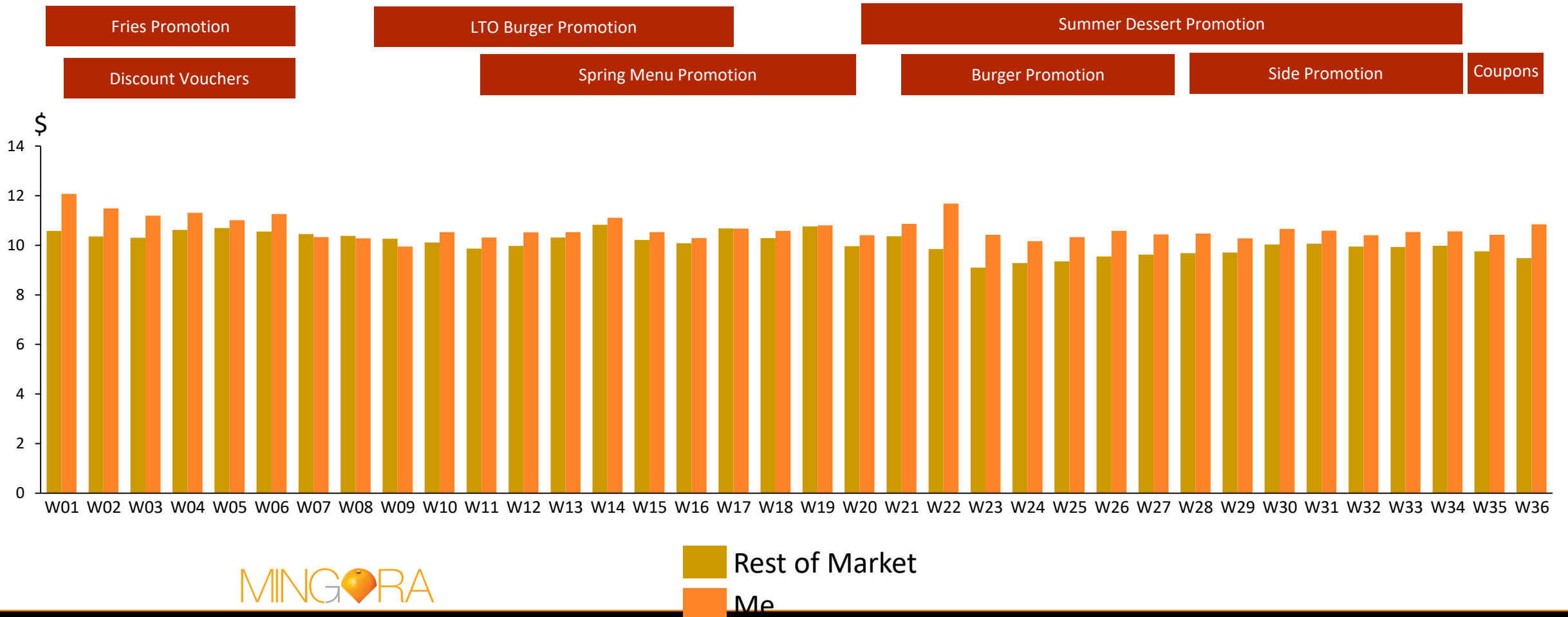
Point Gap in PCYA Between Me and Rest of Market



# ANALYSIS: AVG TICKET VS COMPETITORS

Identify initiatives that coincided with increased ticket value vs the market

Average Ticket Value This Year for Me & Rest of Market



**Trusted by Brands:**  
**Empowering Success**  
**Across Industries**

SERVING  
**50+**  
 GLOBAL  
 BRANDS  
 WITH  
**10+**  
 MILLION  
 DATA  
 POINTS

RESTAURANTS



FOODSERVICE



STRATEGY &  
 REAL ESTATE



# OUR CLIENT RETENTION IS >95% SINCE 2018



## \$100m+ Revenue Decisions

“PepsiCo used Mingora’s Survey results extensively in their Strategic Annual Planning Discussions with Major Restaurant Clients. The Information about Consumer Behaviour, Brand Satisfaction, Average Eater Check and Combos helped them to together identify avenues to drive sales and consumer satisfaction.”



**Shweta Madan,**  
Shopper Insights, PepsiCo  
AMESA



## Weekly Marketing Decisions

“SalesTrack data is pretty much the only tool we have that shows our brand’s performance.

Every week we analyze where we stand versus our marketing spend. We track competition and the special offers they promote - and look for any movement in the data.”



**Tapan Vaidya**  
CEO Papa Johns, GCC

**Meet the Experts Behind  
the Insights**



# MEET OUR TEAM



**Muhammad Ali Syed,**  
*Founder & CEO*

Former Head of Marketing for top Fortune 250 brands including KFC, Pizza Hut (Yum! MENA, \$1B), Long John Silver's (Yum! US, \$800M), and Wendy's (Asia-Pacific & EMEA, \$250M).

**Extensive Network:** Connected with 800+ executives from top-tier global food ecosystem players.

**Mariam Imran**  
*Manager, Research & Analytics*



Over 6 years of experience in digital transformation and business analytics, including roles at The Coca-Cola Company (Eurasia & Middle East) and in brand management at Ismail Industries.

**Industry Expertise:** Specialized in driving insights and analytics for global brands.



## Growth Board

**Andy Holman**  
CEO of Tasha's Group



**Zevae M. Zaheer**  
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