Special Insights

Revenue Management Solutions

Restaurant Consumer Insights

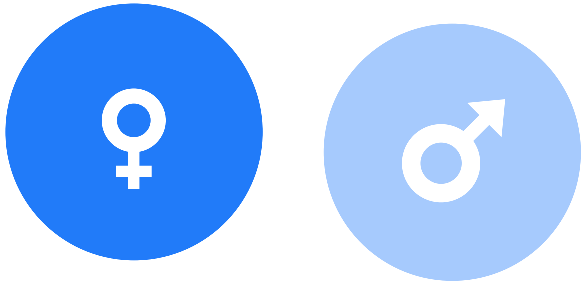
Q2 2021 – UK Edition

revenuemanage.com

About the survey

RMS surveyed 1,263 participants across three European markets from June 24 - 30, 2021. This report examines the results specifically from UK (n=410).

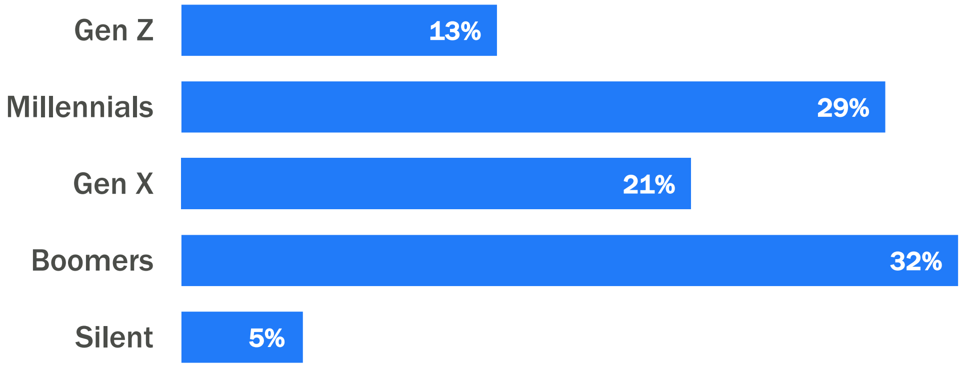
Gender



52%
Female

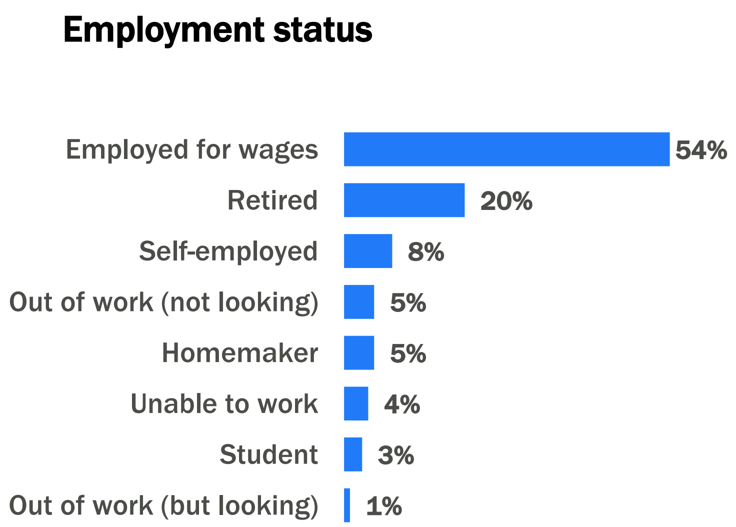
48%
Male

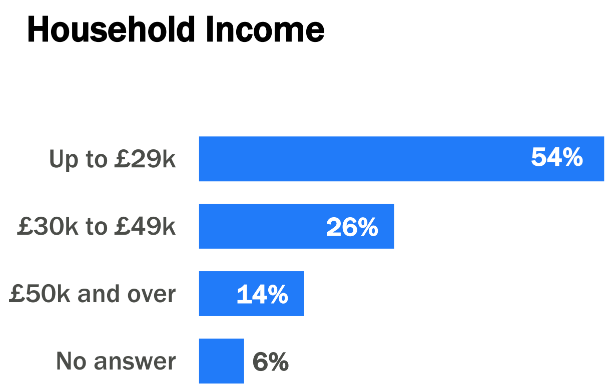
Generation

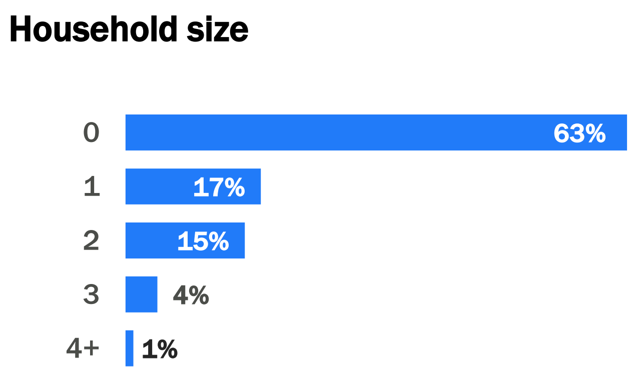


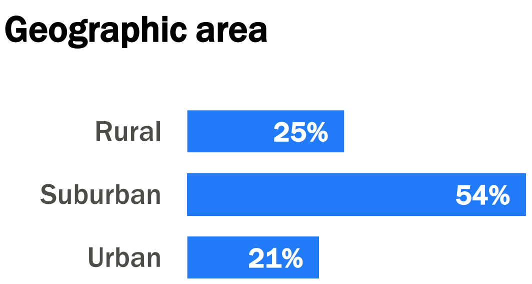
Respondent breakdown

RMS surveyed 1,263 participants across three European markets from June 24 - 30, 2021. This report examines the results specifically from UK (n=410).





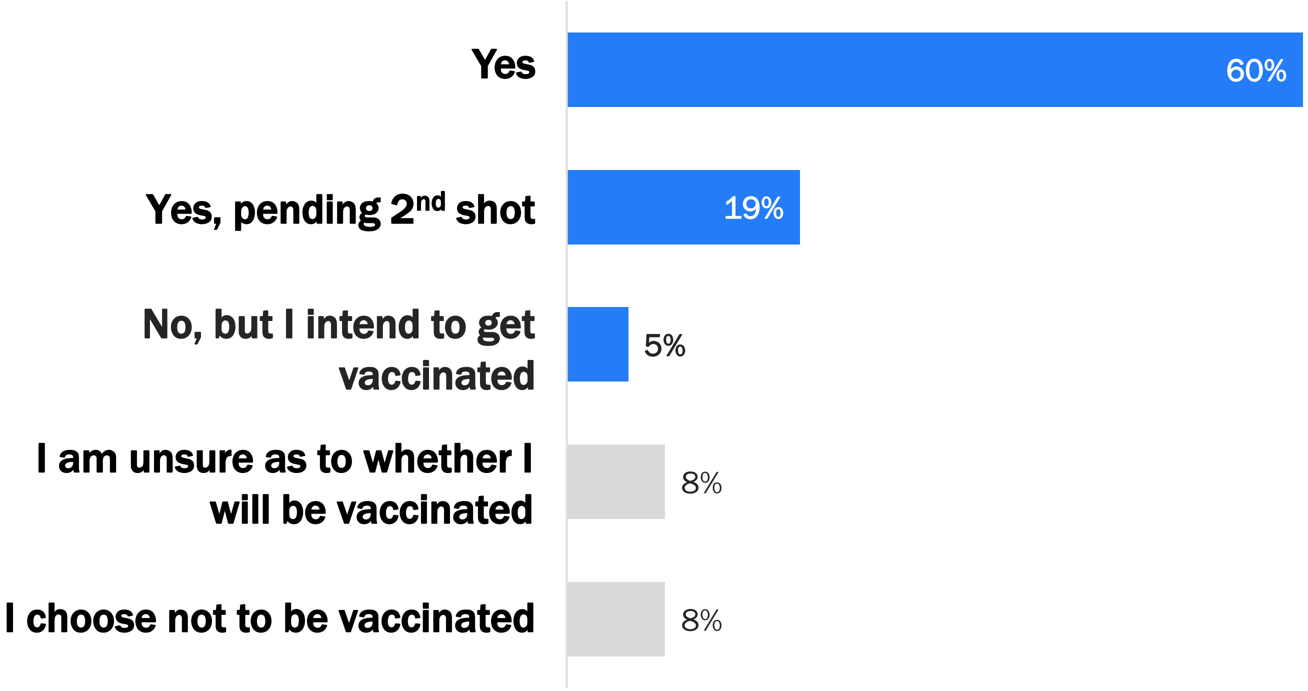




Where Are We Now

More than 80% of respondents have been or plan on being vaccinated

Have you received the COVID-vaccine?



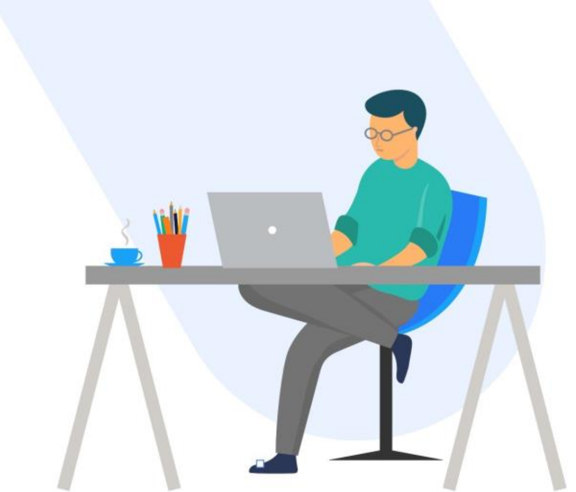
June 2021 n=406

Deep Dive

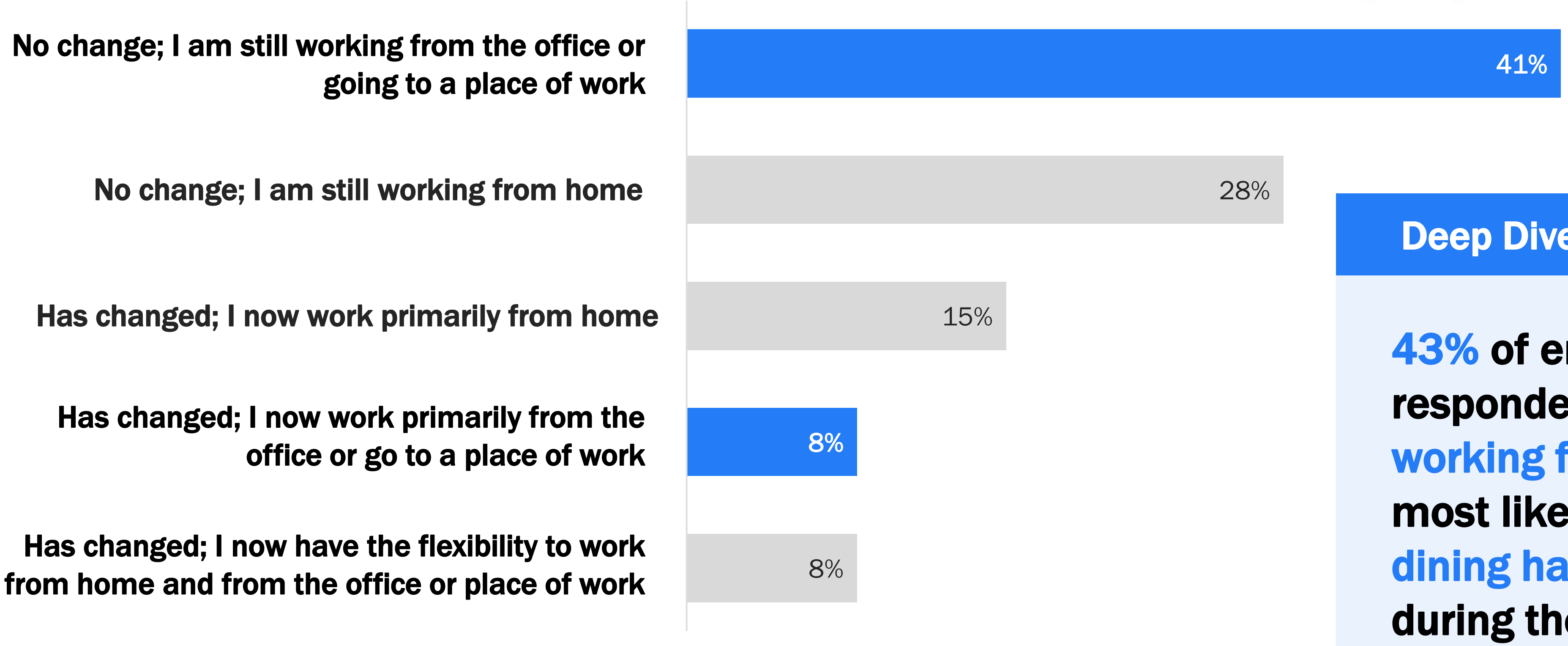
Currently, boomers make up 50% of those fully vaccinated. Millennials are expected to grow their share of the vaccinated population from 15% to 25%.

This is a positive outlook for restaurants as younger and fully vaccinated adults are looking to go out and socialise.

Almost 50% of employed respondents are now commuting to an office or workplace full time



Within the last three months, how has your work environment changed?



Deep Dive

43% of employed respondents are still working from home and most likely will stick to dining habits developed during the pandemic.

June 2021 n=254

1 in 2 respondents are concerned with not being able to travel due to Covid-19 restrictions

What are your household concerns right now?

Themes	
Not being able to travel	48%
Not being able to celebrate milestones with friends/families	35%
Not being able to do things I want to do	35%
The emotional/mental health of my household	29%
Members of my household becoming infected	23%
Keeping up with frequent changes in government guidelines	23%
The economic impact on local business in my community	18%
Not being able to dine out in restaurants	16%
Having the financial means to feed my family	16%
Keeping my children occupied and active during the pandemic	13%
Maintaining current employment	12%
None of the above	7%

June 2021 n=406

Deep Dive

35% are concerned with not being able to celebrate milestones, reinforcing the fact consumers are longing for social occasions.

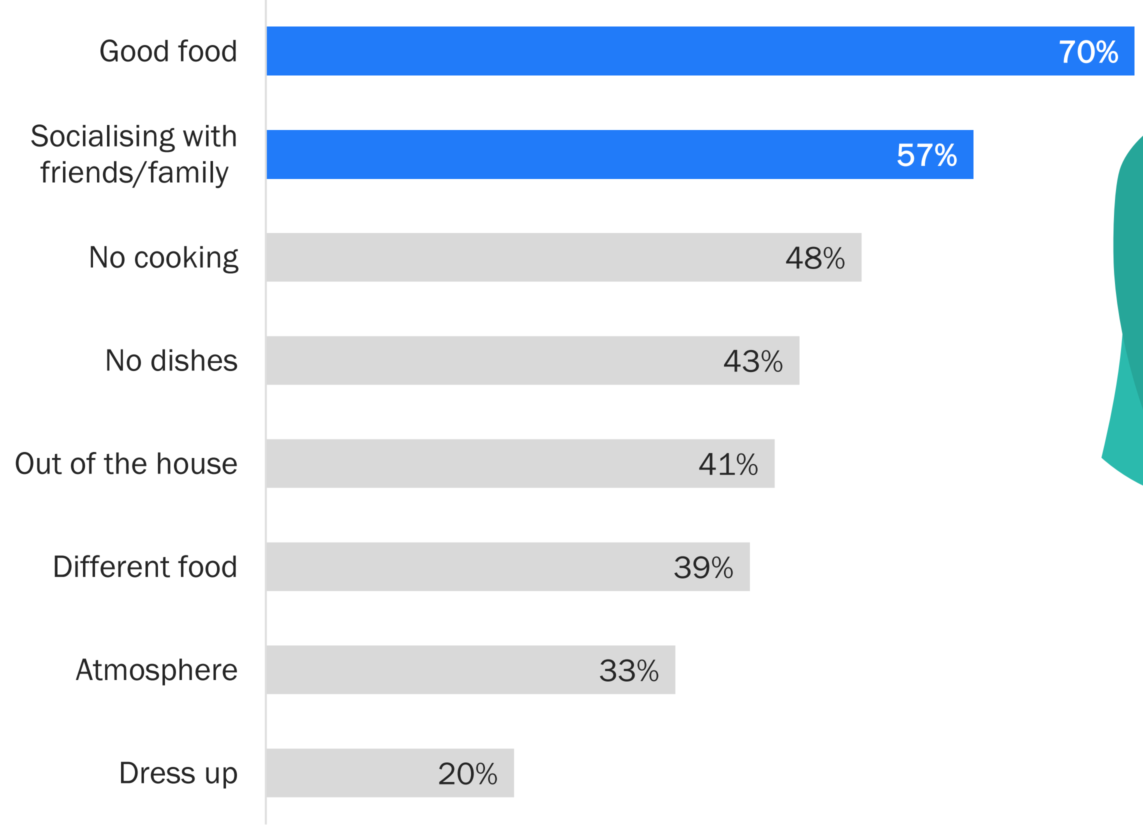
Only 23% are concerned with becoming infected suggesting that COVID related anxieties are easing.

Dining Out Intentions

Insight One

Good food and socialising are the top motivators for respondents when choosing to dine out

What do you like the most about eating out?



June 2021 n=406

Deep Dive

Older generations (boomers, Gen X and millennials) enjoy not having to cook or do the dishes, plus trying different foods.

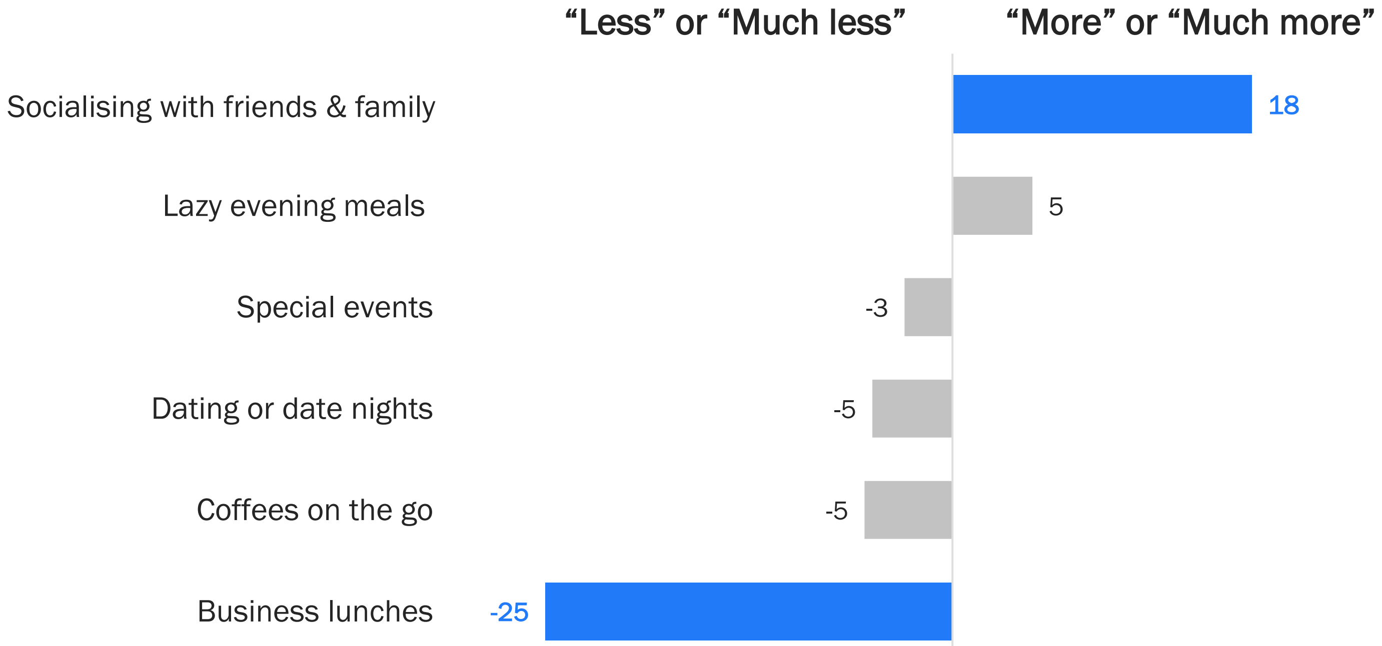
The desire to get out of the house is more predominant amongst **younger generations.**

Insight Two

Guests want to **socialise more with family & friends** than with business partners when dining out

Going forward, how often do you plan on eating out at restaurants versus before the pandemic, for the following occasions:

Net Intention Score*



June 2021 n=406

* Net Intention Score = Share of respondent who plan eating out “more” or “much more” - Share of respondent who plan eating out “less” or “much less”

Deep Dive

Gen Z and millennials are particularly eager to return to dating or date nights.

Socialising is the primary driver for Gen X and boomers.

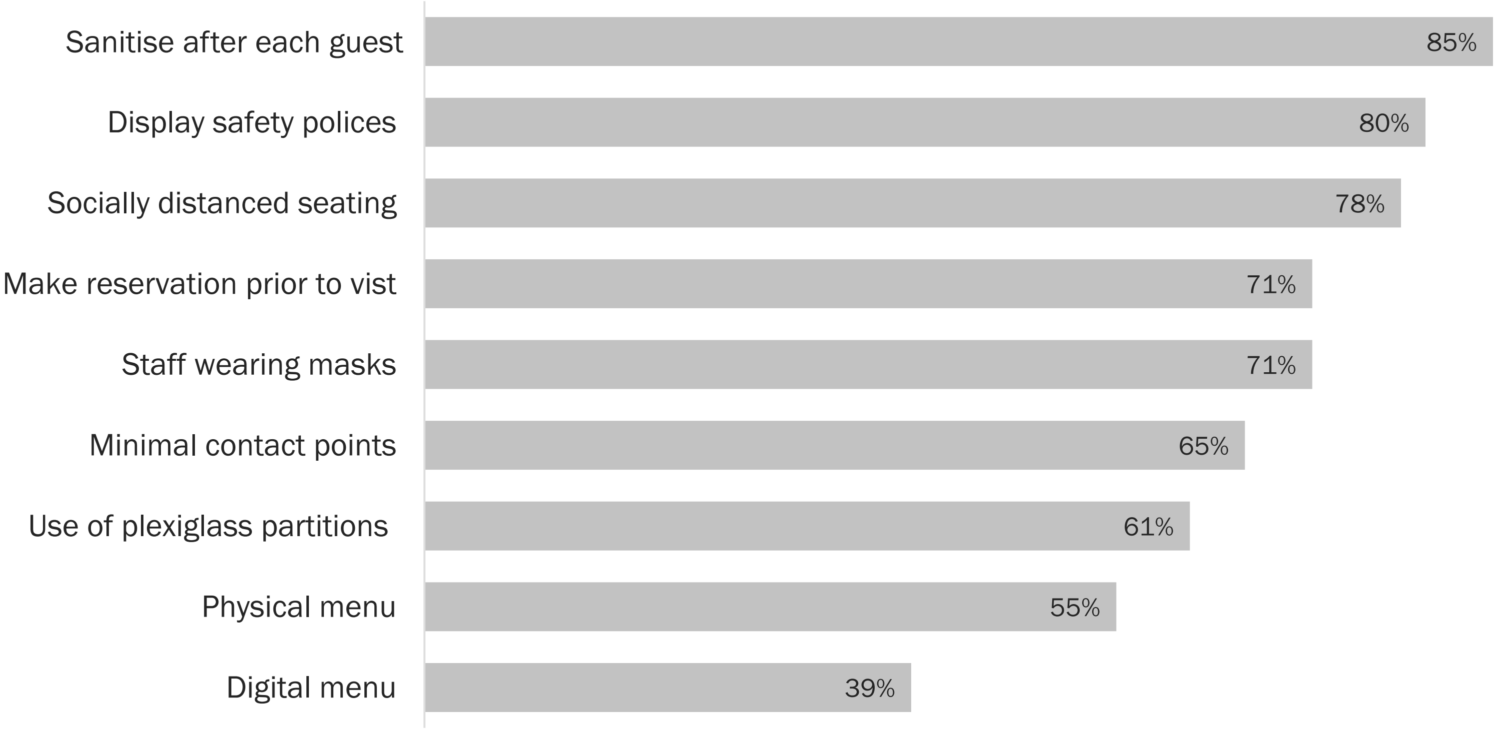
Restaurant Services & Technology

Insight Three

Guests **expect to continue seeing safety precautions** in place when dining out

Please indicate how much you agree or disagree with the statements below when it comes to restaurant services?

Share of participants who "agree" or "strongly agree"



June 2021 n=406

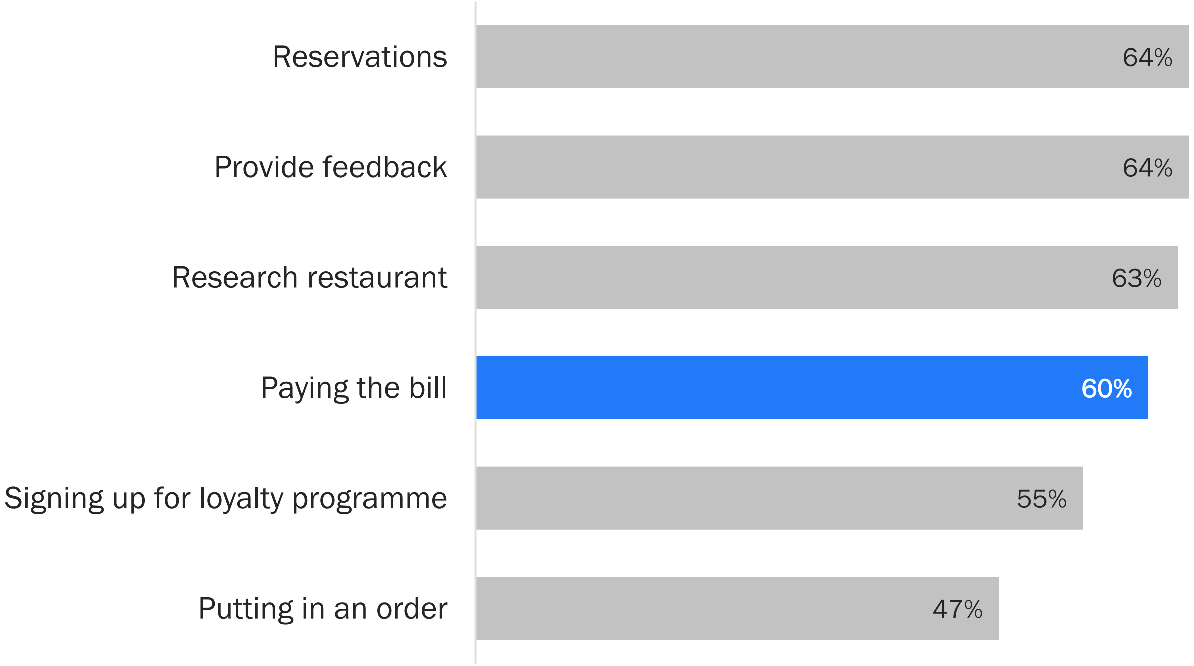
Deep Dive

Overall, consumers no longer expect to order from digital menus, as only 39% of respondents indicated that they "agreed" or "strongly agreed" with that statement.

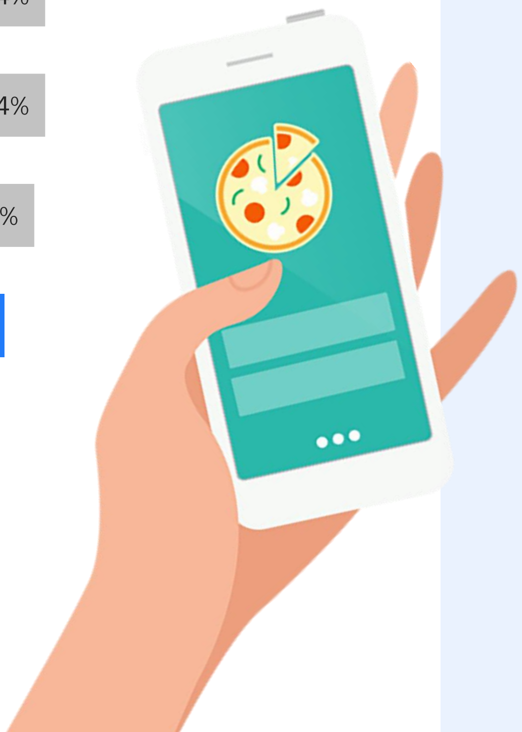
Insight Four

Using an **automatic payment method to pay the bill** is now among the top uses of automated technology in restaurants

I prefer using technology to automate (replace) the following service processes



June 2021 n=406



Deep Dive

Only 47% of guests prefer using technology to place an order.

This figure increases to 62% for Gen Z and falls to 32% for boomers.

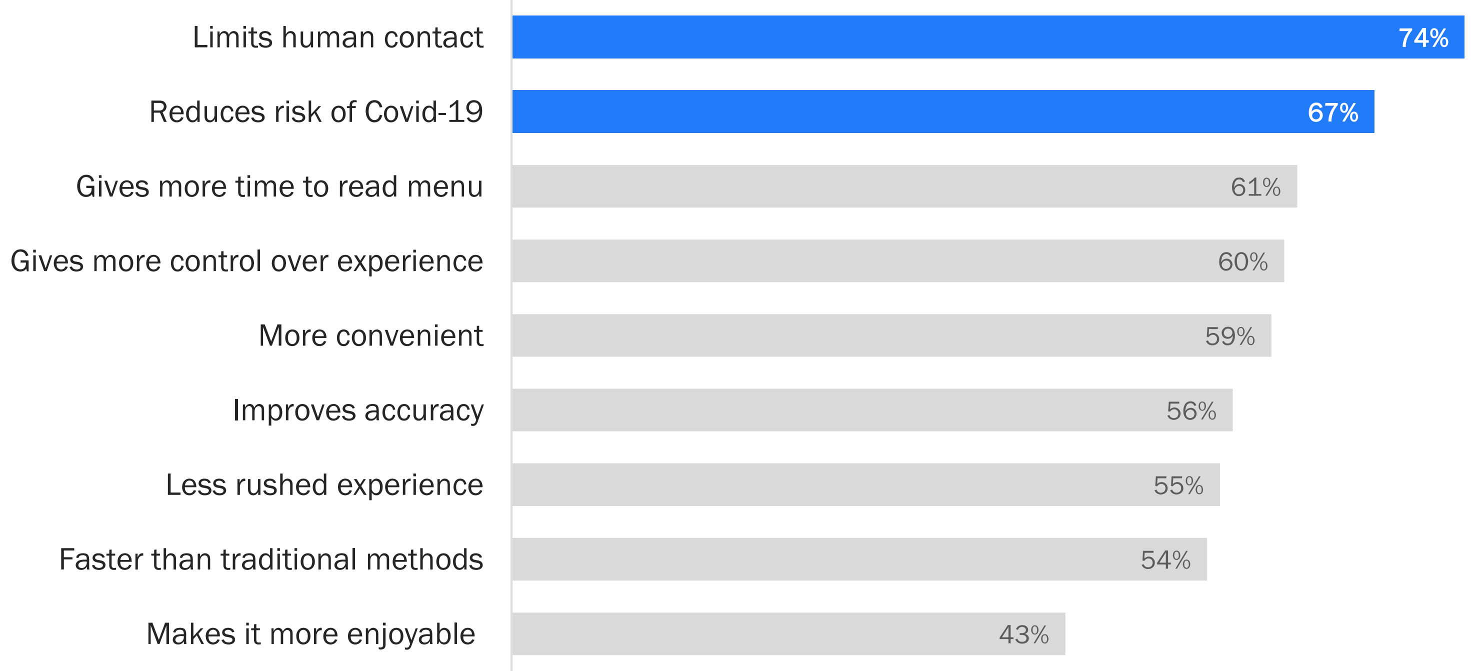
62% of millennials and 68% of Gen X prefer using technology to **sign up for a loyalty programme.**

Insight Five

Respondents believe the use of technology limits human contact and reduces Covid-19 related risks

To what extent do you agree with the following regarding the use of technology during your restaurant experience

Share of participants who "agree" or "strongly agree"



June 2021 n=406

Deep Dive

Over 2/3 of younger respondents agree that technology provides a less rushed experience and more time to look at the menu.

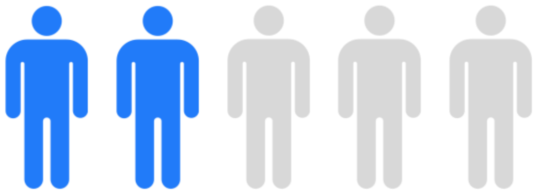
Only 43% of participants believe the use of technology **makes the experience more enjoyable.**

This figure increases to 62% for Gen Z and falls to 27% for boomers.

Consumer Price Perceptions

Insight Six

2 in 5 respondents spend more on restaurants in an average week now compared to 3 months ago



How much more do you spend on restaurants than you did 3 months ago?

57% estimate their restaurant spend increased by **less than 15%.**

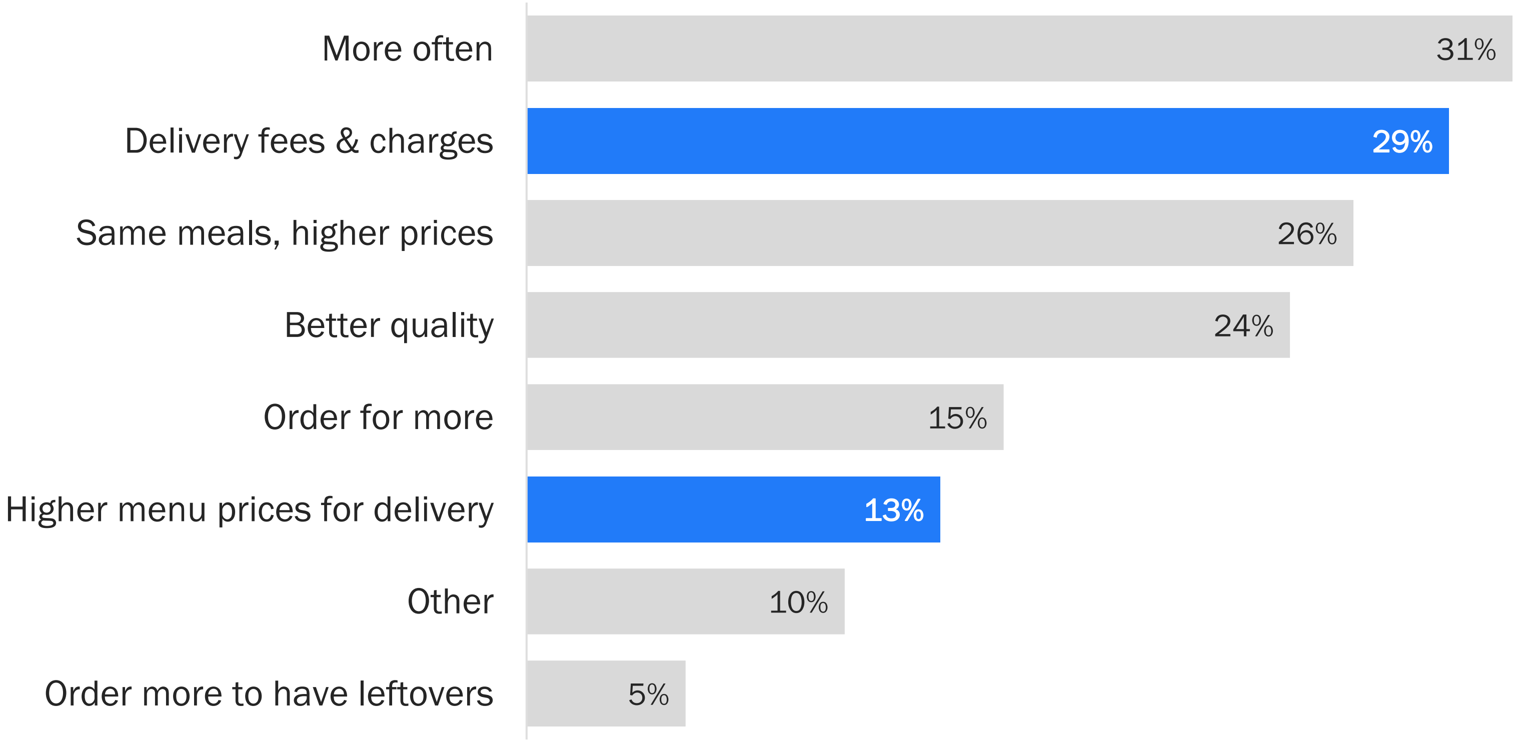
43% estimate their restaurant spend increased by **more than 15%.**

June 2021 n=164

Insight Seven

42% list delivery fees and upcharges as reasons for spending more

Please tell us which factors are making you spend more on restaurants?



June 2021 n=164

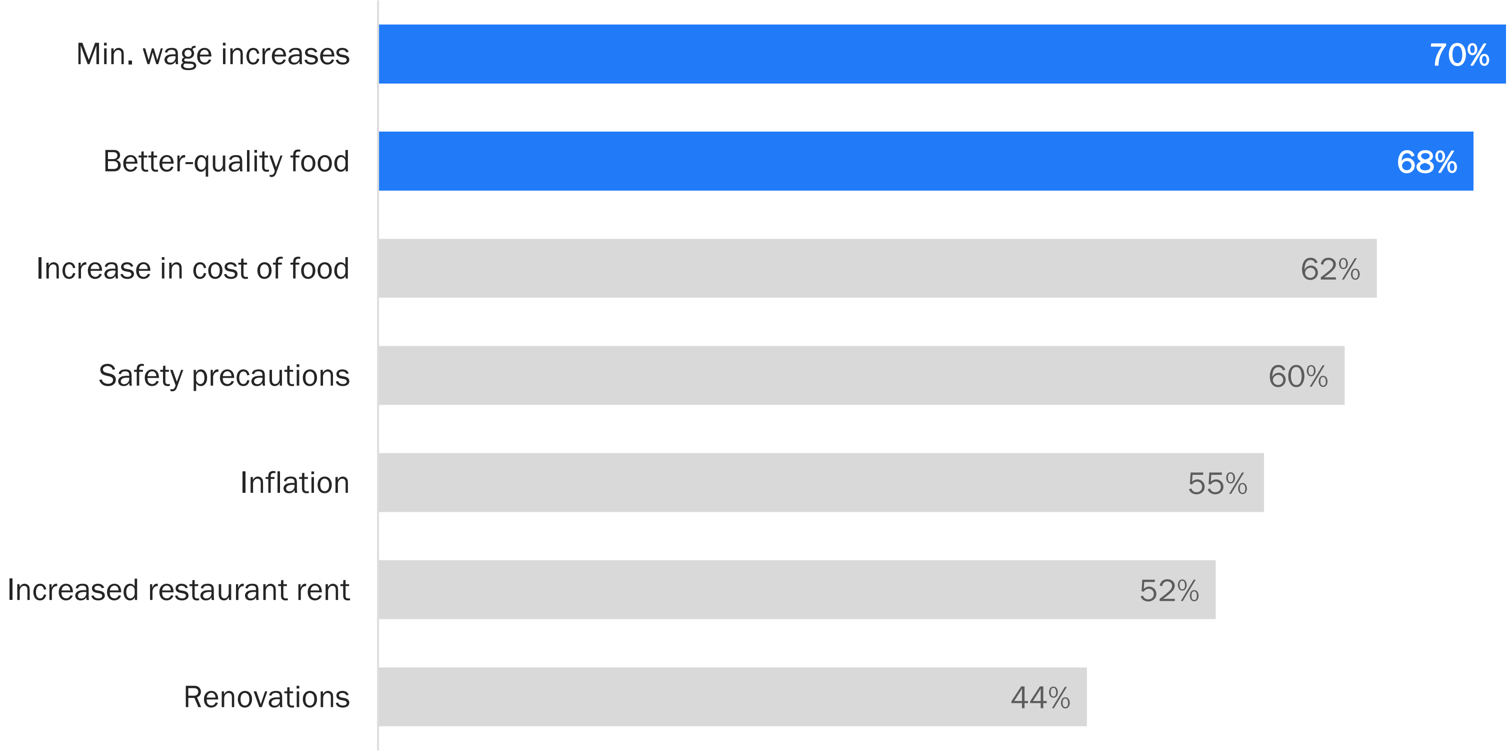
Deep Dive

31% stated they are ordering more often. While 26% stated they are spending more because the typical meals they order are now more expensive.

Insight Eight

Most respondents believe increased minimum wage and better-quality food justify price increases

Please indicate to what extent you agree or disagree when it comes to justifiable reasons for restaurants to increase prices



June 2021 n=164

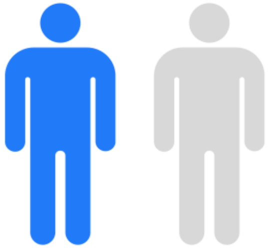
Deep Dive

Real estate rationales such as rent increase or renovations are less justifiable reasons for diners.

Quick Service & Combo Meals

Insight Nine

Almost 1 in 2 respondents purchased a combo meal from a quick-service restaurant in the past month



70% of **Gen Z** and **millennials** purchased a combo meal from a QSR in the past month, while only **52%** of **Gen X** and **27%** of **boomers** did the same.

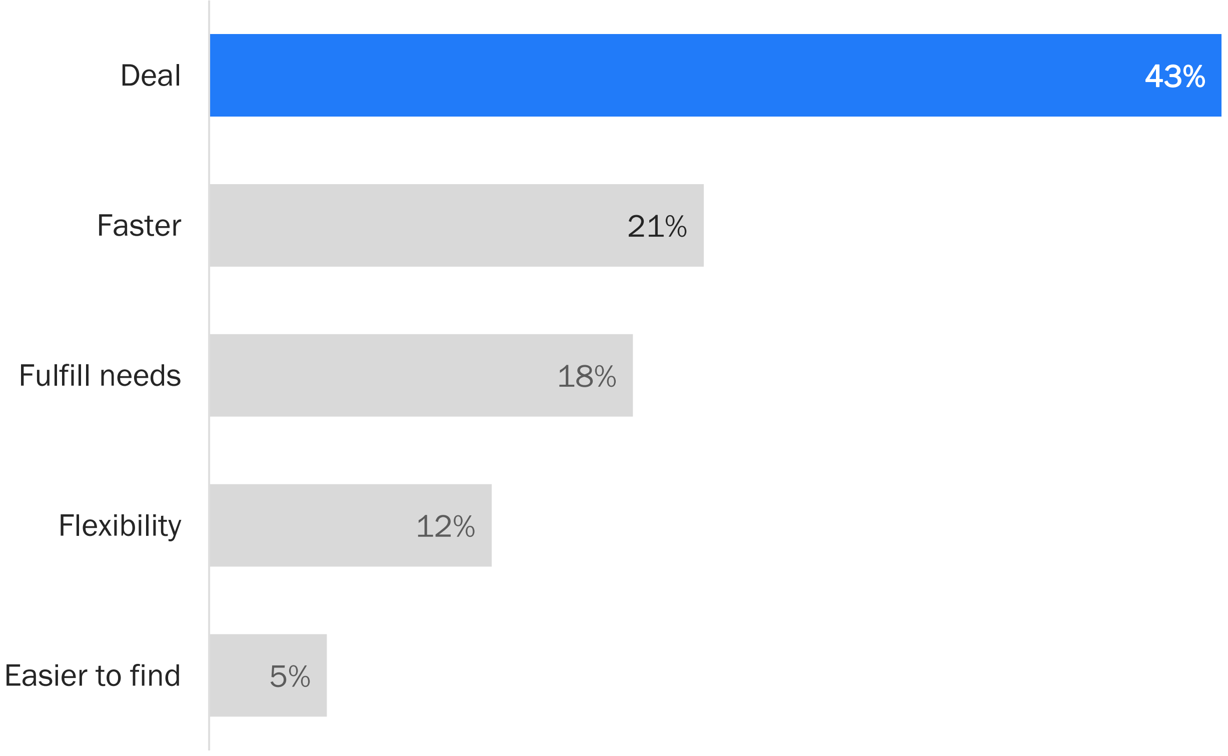
68% of **family households** purchased a combo meal from a QSR in the past month, while **39%** of **single households** did the same.

June 2021 n=201

Insight Ten

Value is the most important factor in combo meal purchases, followed by having needs and preferences met

Please pick the option that best describes you. I buy combo meals at QSR because…



June 2021 n=201

Deep Dive

30% chose responses related to having their needs and preferences met (fulfill needs + flexibility).

While 26% chose convenience as a primary driver for purchase (faster + easier to find).

Summary of insights

1. **Good food and socialising** are the top motivators for respondents when **choosing to dine out.**

2. Guests want to **socialise more with family & friends than with business partners** when dining out.

3. When eating out at restaurants, guests **expect to continue seeing safety precautions** in place.

4. **60%** state that using an **automatic payment method to pay the bill** is now among their **top uses of automated technology** in restaurants.

5. Respondents believe the **use of technology limits human contact and reduces Covid-19 related risks**.

6. **2 in 5** respondents **spend more on restaurants in an average week now** compared to 3 months ago.

7. **42%** list **delivery fees and upcharges** as **reasons for spending more**. **31%** stated they are **ordering more often.**

8. Most respondents believe **increased minimum wage and better-quality food** justify **price increases.**

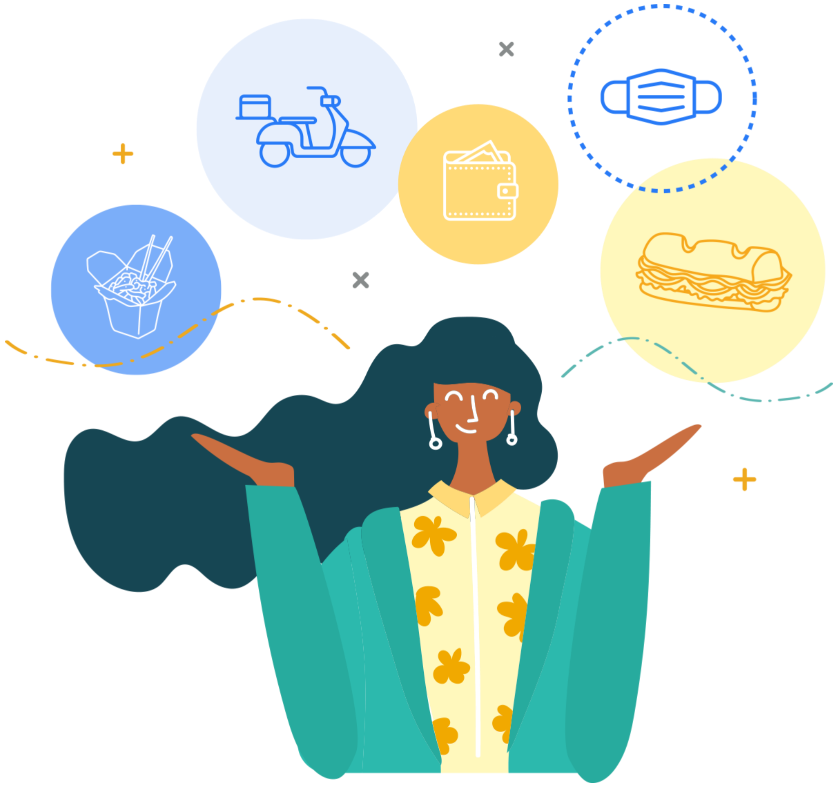
9. **Almost 1 in 2** respondents **purchased a combo meal from a quick-service restaurant** in the past month.

10. For **43%** of respondents, **value** is the **most important factor in combo meal purchases**, followed by **having needs and preferences met.**

Revenue Management Solutions

Increasing margins for food service and hospitality companies for 25 years.

We help executives and finance professionals in the restaurant industry address profitability challenges. Our data-driven approach to optimising sales, menus and financial health helps iconic brands and upcoming concepts in more than 40 countries. We currently count more than 100,000 restaurants as clients.



Do more with your data. Partner with us today.

Visit revenuemanage.com
Email us at info@revenuemanage.com
Or call any of our five offices across the globe.

North America:	+1 813 277-0034
Europe/London:	+44 (0)20 3948 1871
Europe/Paris:	+33 (0)1-80-96 47-00
Asia/Singapore:	+65 6807 0650
Asia/Tokyo:	+81 (03) 5326-3022

We are ready to help.