



Restaurant Consumer Insights

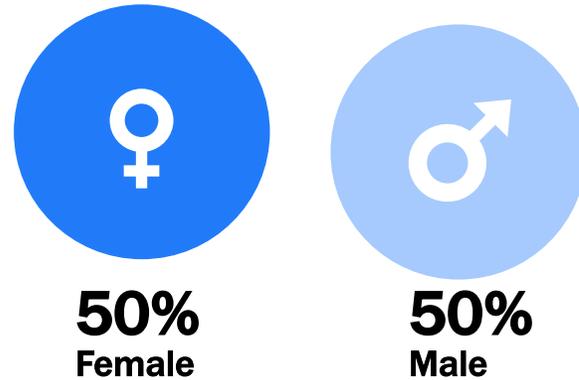
Summer 2021 – Germany Edition



About the survey

RMS surveyed 1,263 participants across three European markets from June 24 - 30, 2021. This report examines the results specifically from Germany (n=447).

Gender



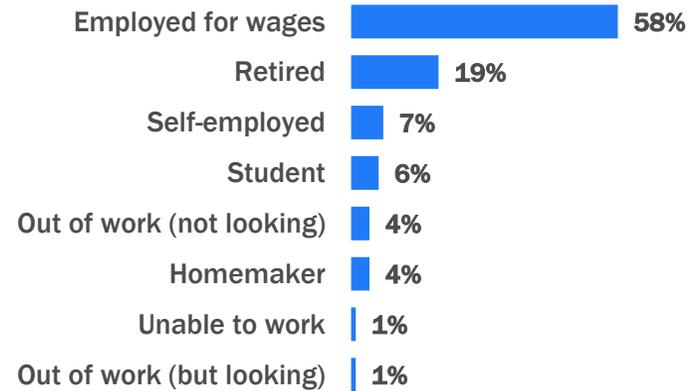
Generation



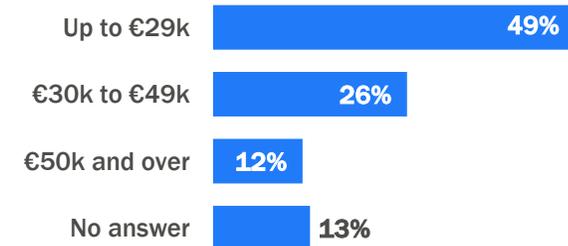
Respondent breakdown

RMS surveyed 1,263 participants across three European markets from June 24 - 30, 2021. This report examines the results specifically from Germany (n=447).

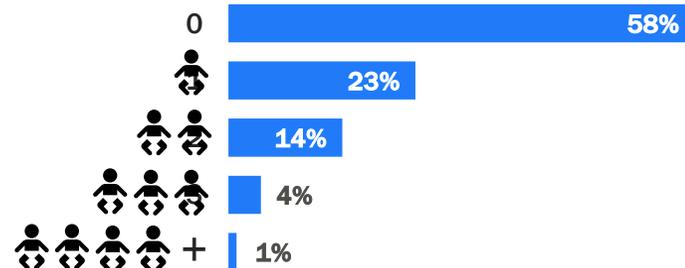
Employment status



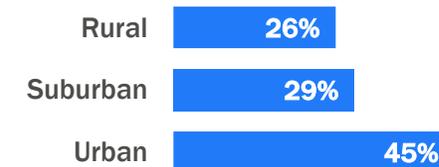
Household Income



Household size



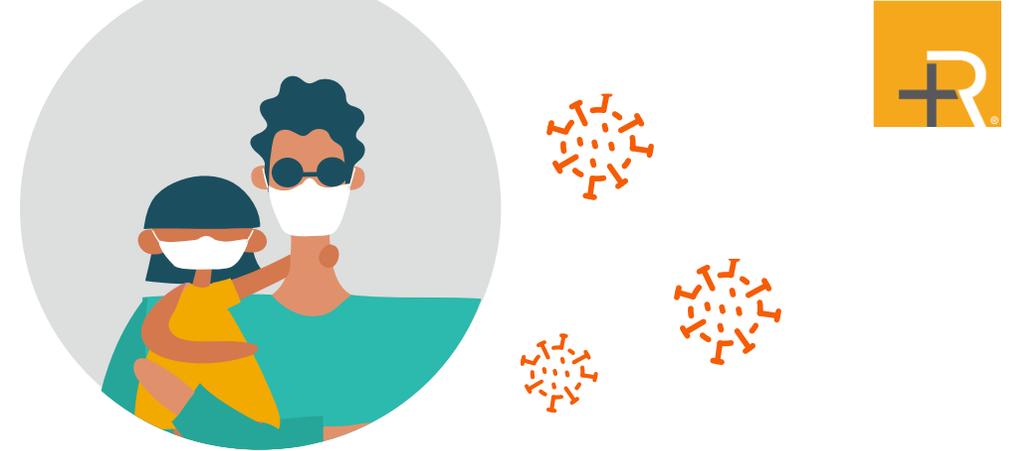
Geographic area



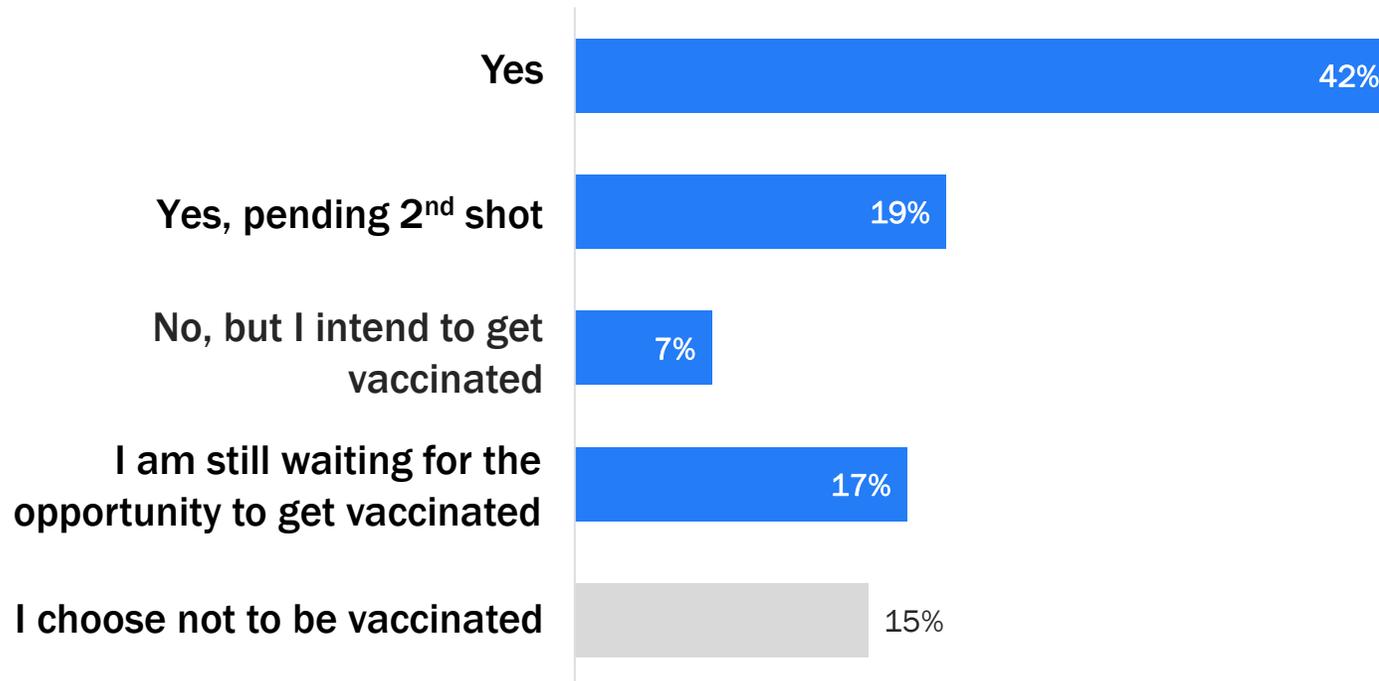


Where Are We Now

Almost 85% of respondents have been or plan on getting vaccinated



Have you received the COVID-vaccine?



June 2021 n=447

Deep Dive

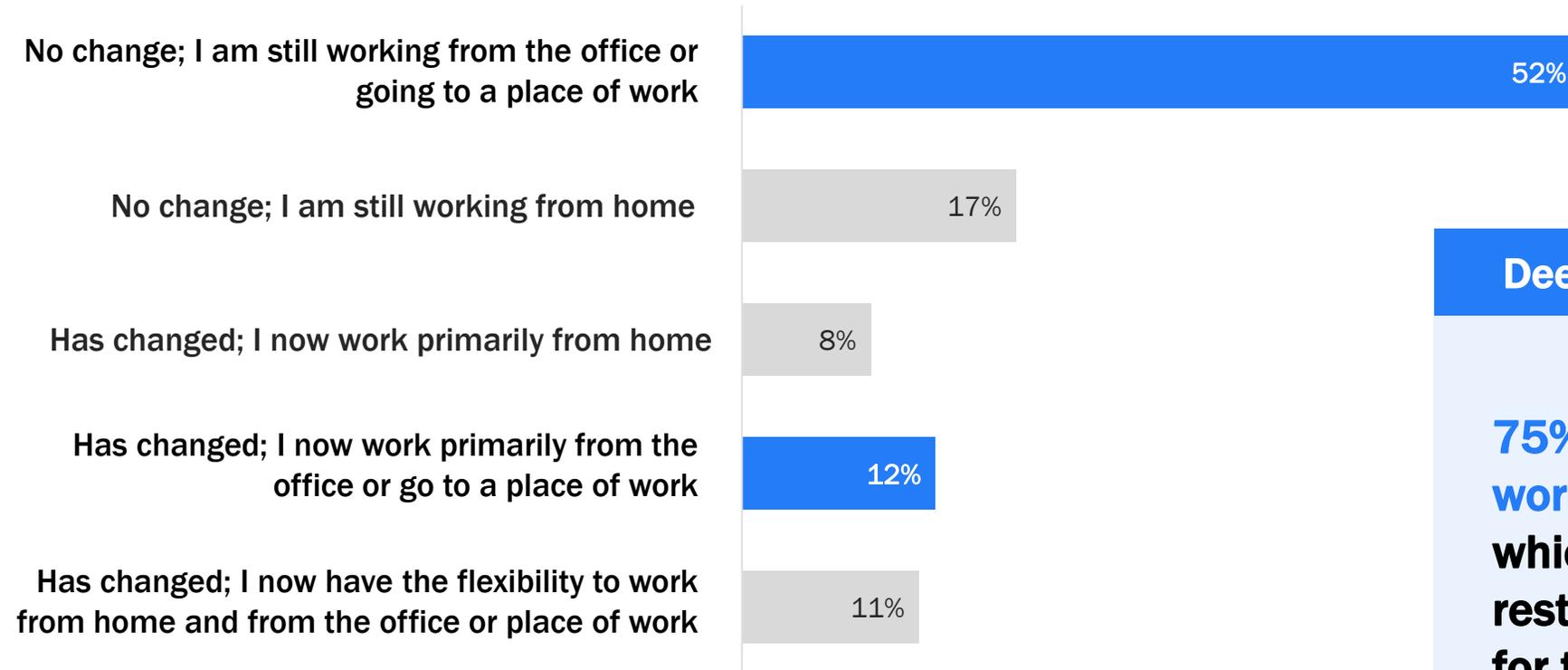
32% of respondents are either unsure or have decided not to get vaccinated.

This sentiment is strongest amongst younger generations. 41% of millennials and 48% of Gen Z do not want to get vaccinated or are still waiting for the opportunity.

More than 60% 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

75% are now going to a workplace or office which will help restaurants, particularly for the lunch daypart.

50% of households are still concerned with missing out due to Covid-19 restrictions

What are your household concerns right now?

Themes

Not being able to do things I want to do	50%
Not being able to travel	48%
Not being able to celebrate milestones with friends/families	48%
The emotional/mental health of my household	38%
Members of my household becoming infected	38%
The economic impact on local business in my community	28%
Not being able to dine out in restaurants	26%
Keeping my children occupied and active during the pandemic	16%
Having the financial means to feed my family	13%
Maintaining current employment	11%
Keeping up with frequent changes in government guidelines	11%

June 2021 n=447



Deep Dive

Traveling and celebrating milestones with others are also top of mind concerns for German households.

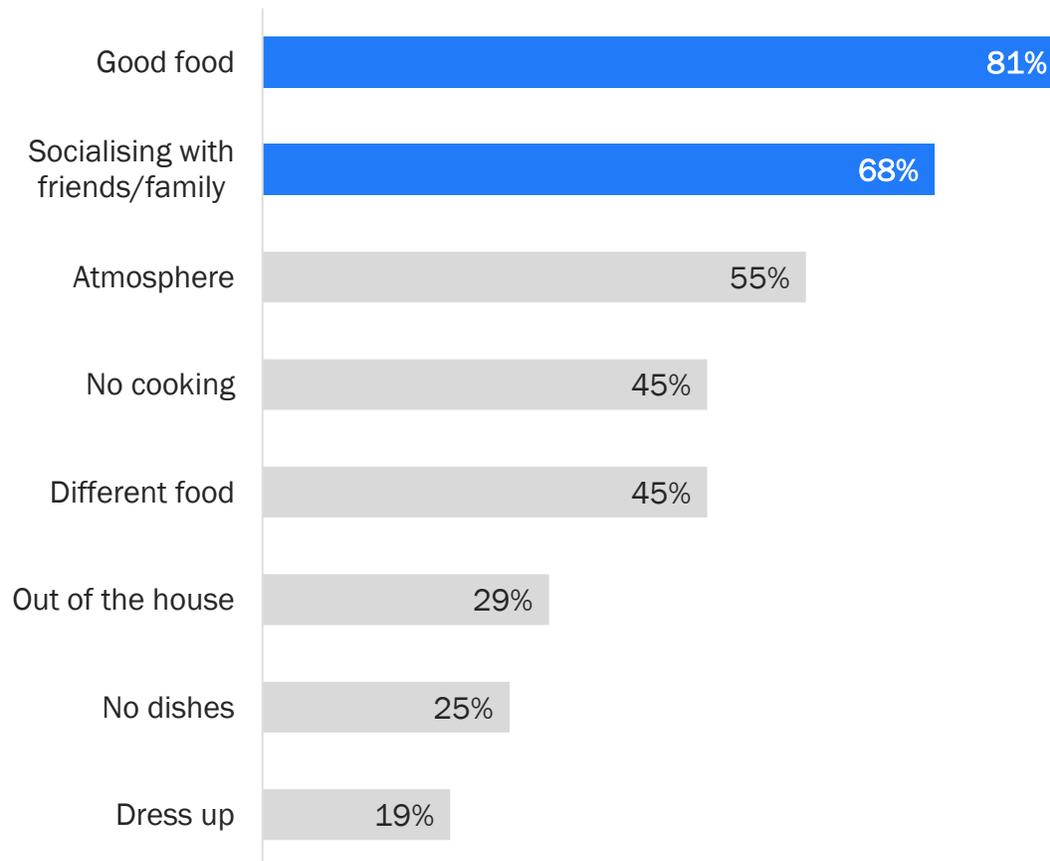


Dining Out Intentions

Insight One

In general, good food and socialising are the main drivers to dine out

What do you like the most about eating out?



June 2021 n=447



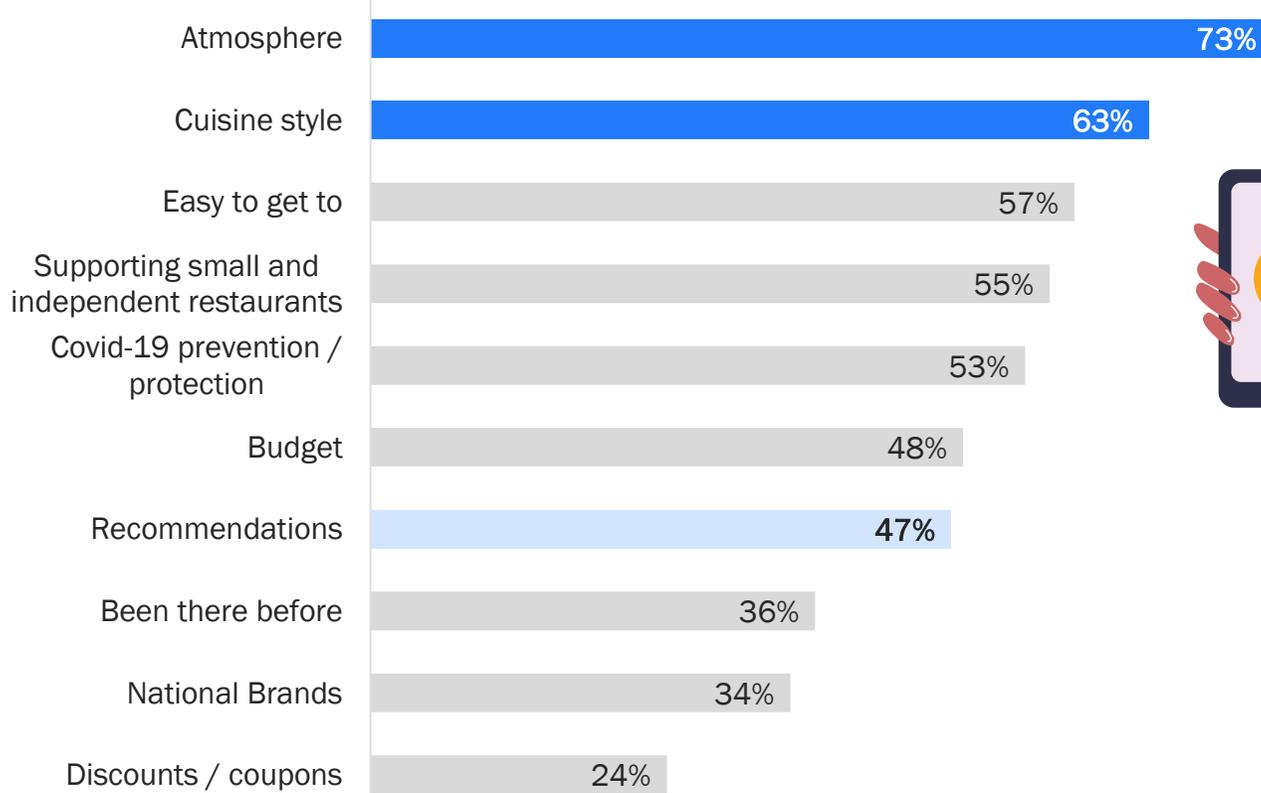
The desire to get out of the house, socialise and dress up is more prominent for Gen Z compared to other generations.

For boomers, the atmosphere of the restaurant and trying different foods are most important.

Insight Two

Atmosphere and cuisine style are the top factors when choosing where to dine out

Going forward, how important are the factors below when choosing a restaurant?

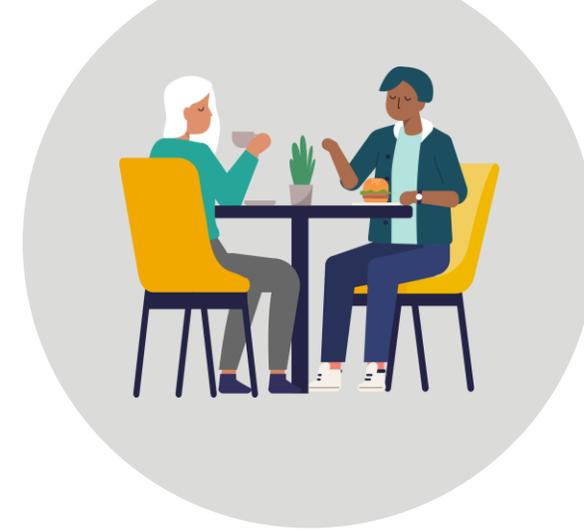


Discounts are more important to **younger generations (Gen Z & millennials)**.

Recommendations are particularly important to **millennials (63%)**.

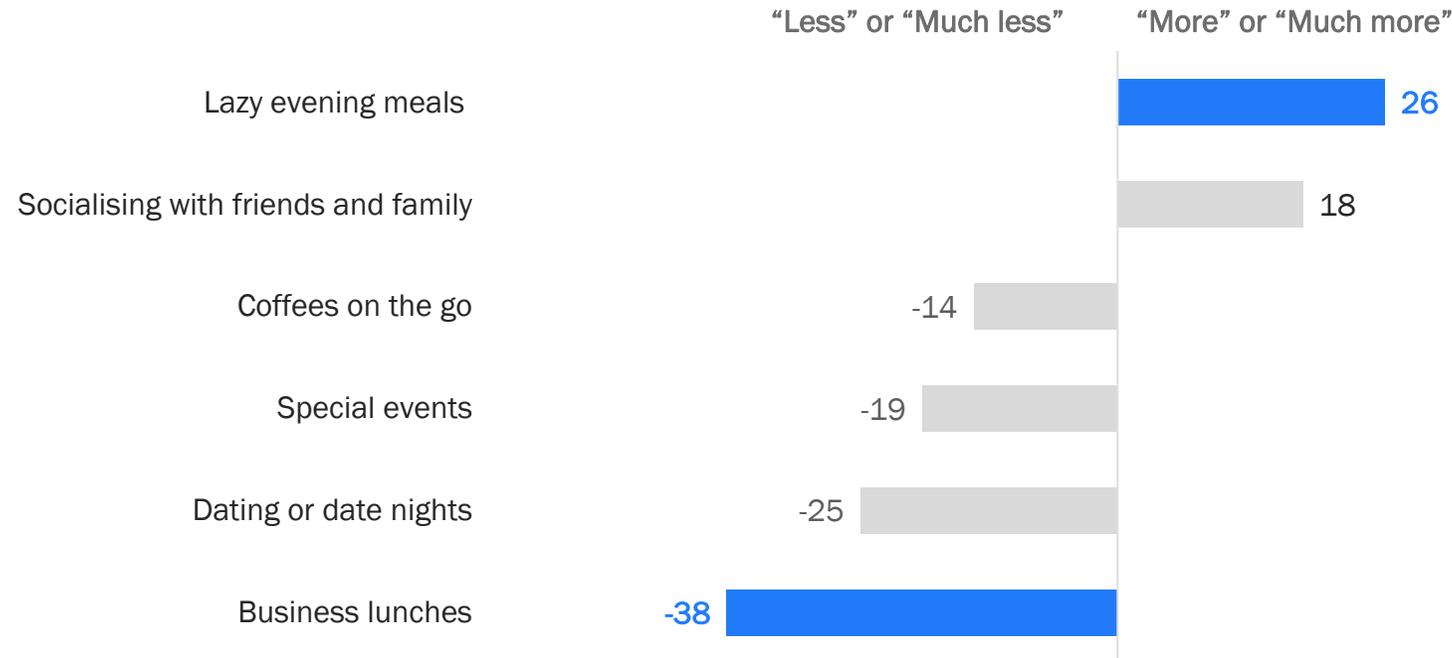
Insight Three

Guests look forward to more **lazy evening meals** than **business lunches** 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=447

* Net Intention Score = plan eating out "more" or "much more" - plan eating out "less" or "much less"

Deep Dive

Gen Z and millennials are particularly eager to return to restaurants to either **socialize or for **lazy evening meals**.**

Intentions for **coffee on the go are higher amongst employed respondents and **urban dwellers**.**



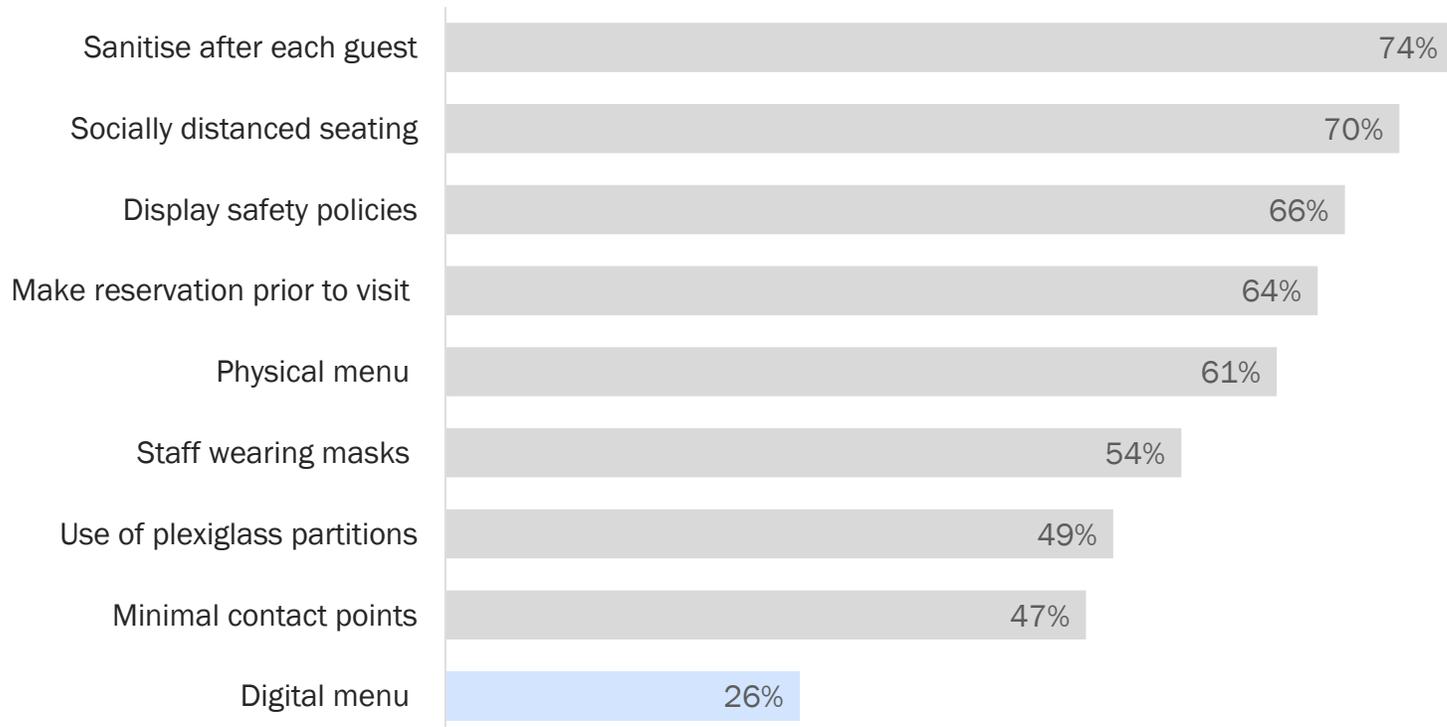
Restaurant Services & Technology

Insight Four

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"



Deep Dive

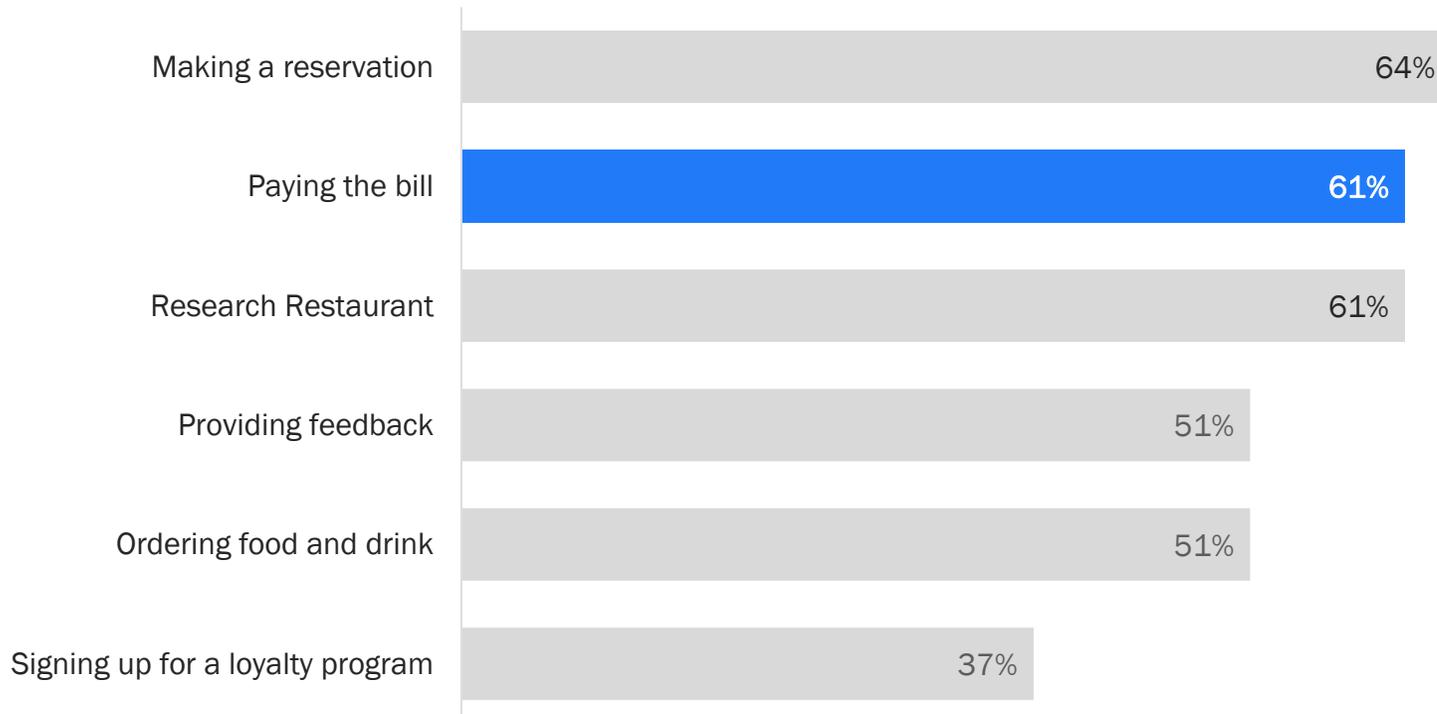
Overall, consumers no longer expect to order from digital menus, as only 26% indicated that they “agreed” or “strongly agreed” with the statement.

Insight Five

Paying the bill is now the #2 reason respondents prefer to use technology in restaurants

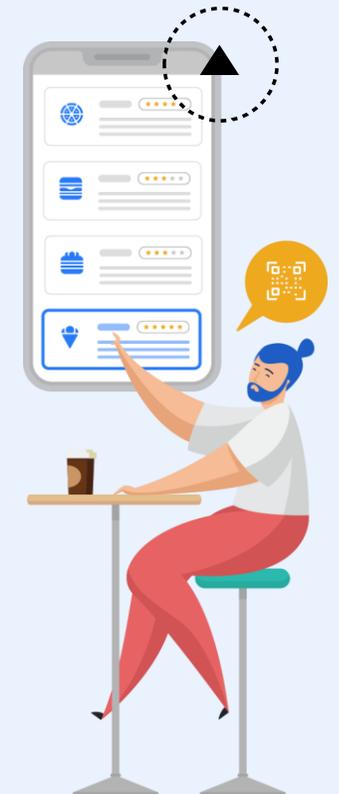
I prefer using technology to automate (replace) the following service processes

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



June 2021 n=447

77% of Gen Z prefers the use of automated technology to pay their bill versus 48% of boomers.

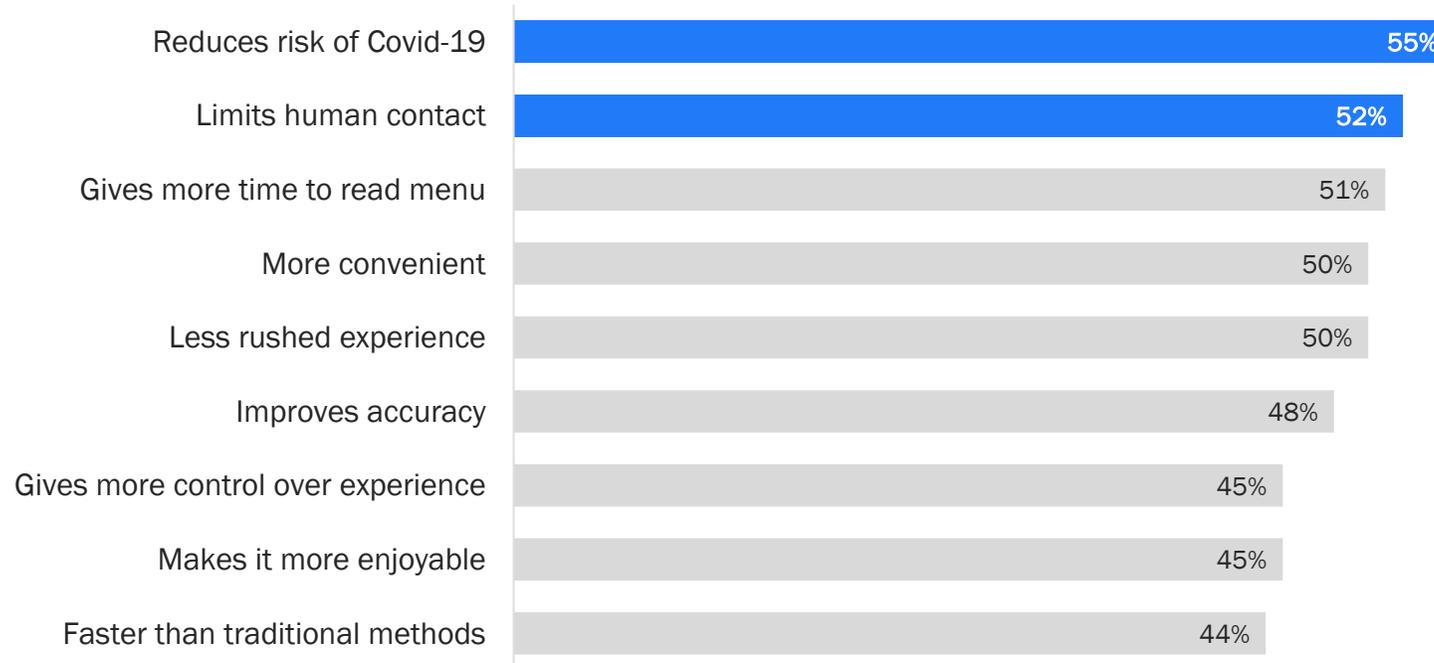


Insight Six

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

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=447

Approximately 6 in 10 Gen Zers agree with the use of technology during their restaurant experience, while only 4 in 10 boomers agree.

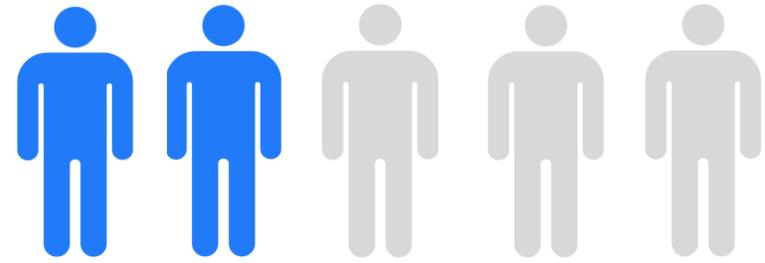




Consumer Price Perceptions

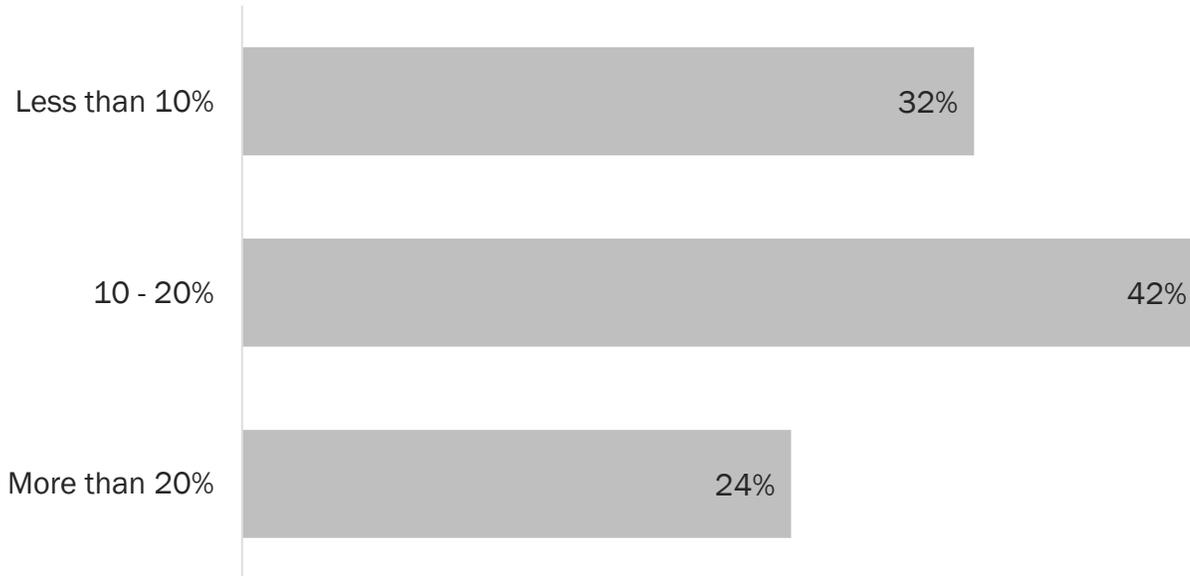
Insight Seven

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

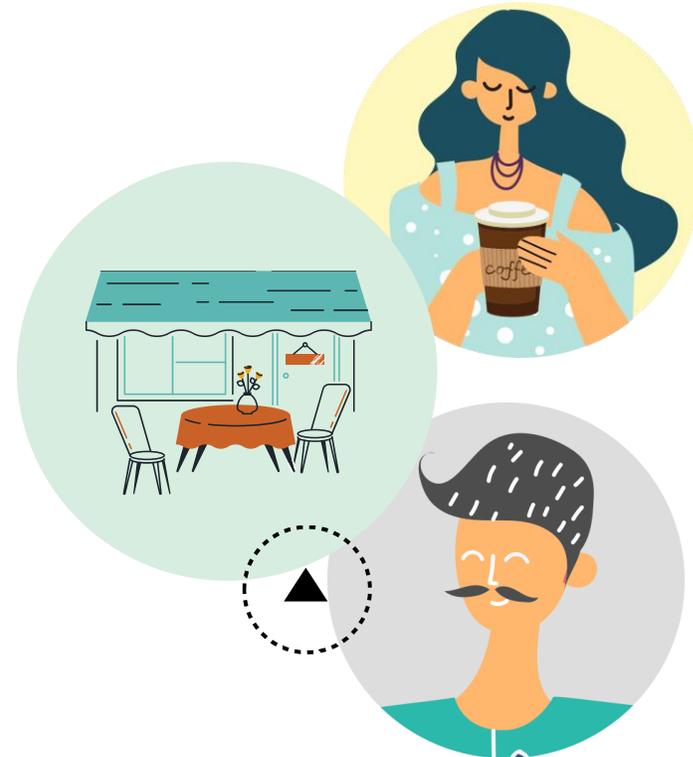


How much more do you spend on restaurants than you did 3 months ago?

Those that spend more estimated that their restaurant spend increased by:



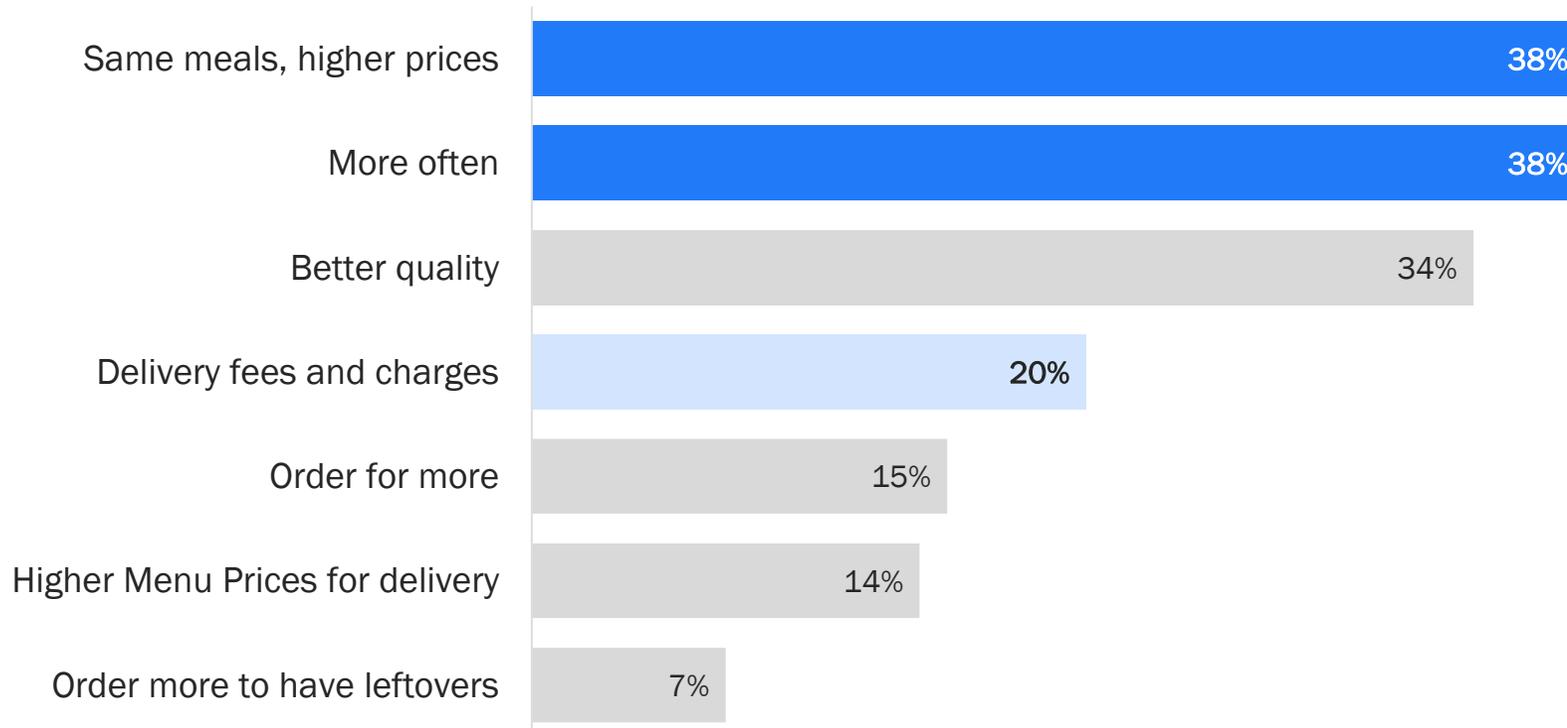
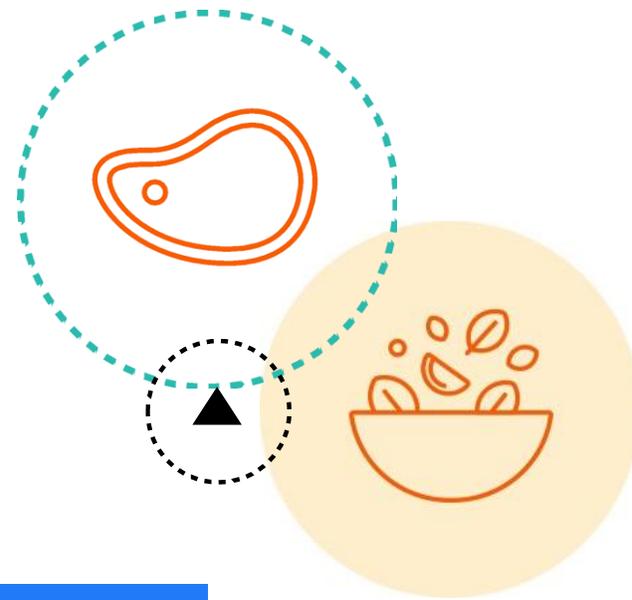
June 2021 n=189



Insight Eight

Almost 40% list higher prices and ordering more often as reasons for spending more

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



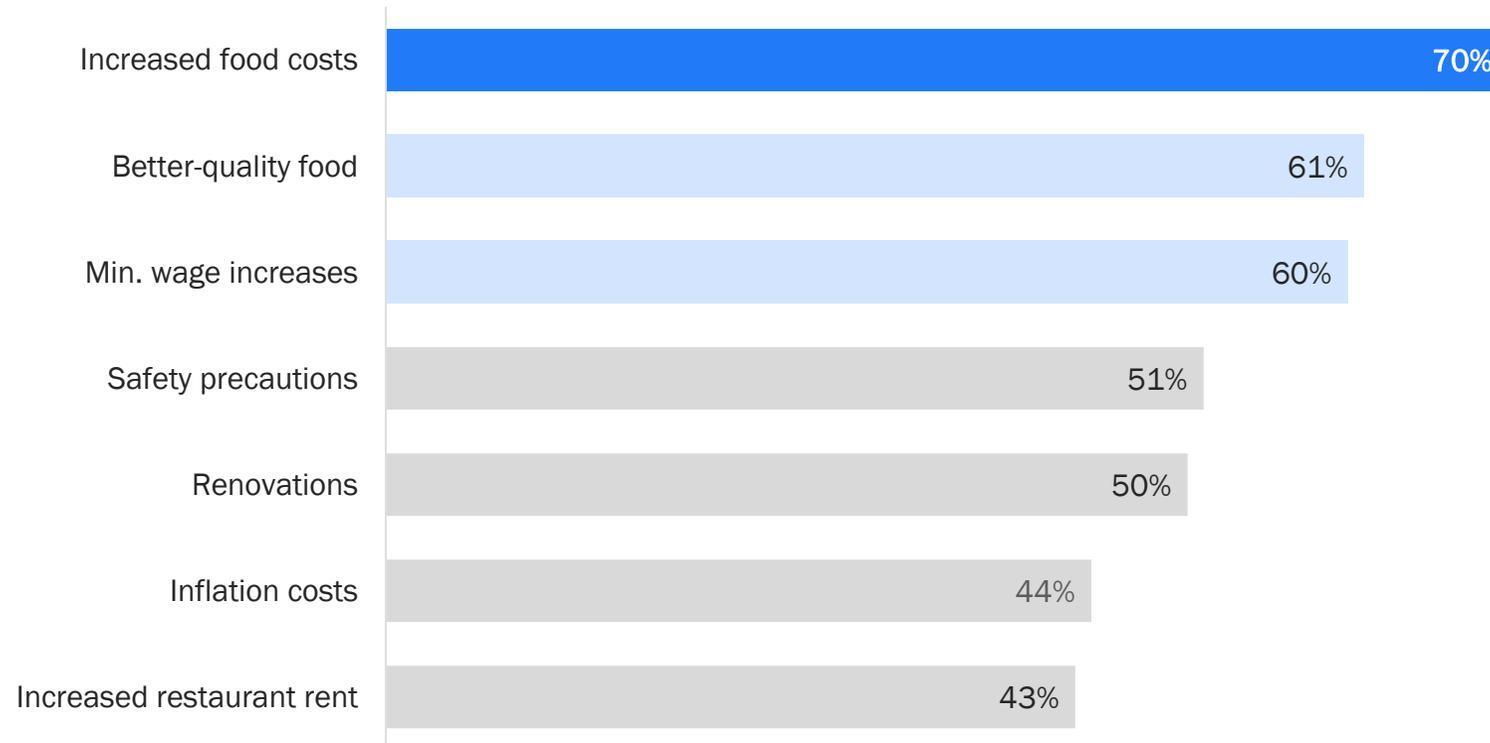
Deep Dive

34% associate delivery with higher spend (delivery fees and charges + higher menu prices for delivery).

Insight Nine

Most respondents believe **increased food costs** justify price increases

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



Deep Dive

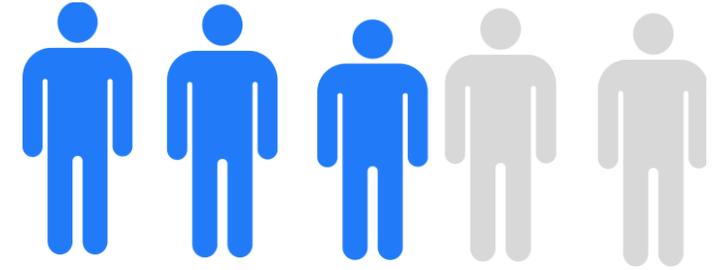
Serving better-quality ingredients and labour cost increases are also widely accepted as justifiable reasons to increase prices.



Quick Service & Combo Meals

Insight Ten

More than **3 in 5** respondents purchased a **combo meal** from a quick-service restaurant in the past month



91% of **Gen Z** and **85%** of **millennials** purchased a combo meal from a QSR in the past month, while only **63%** of **Gen X** and **38%** of **boomers** did the same.



86% of **family households** purchased a combo meal from a QSR in the past month, while **50%** of **single households** did the same.

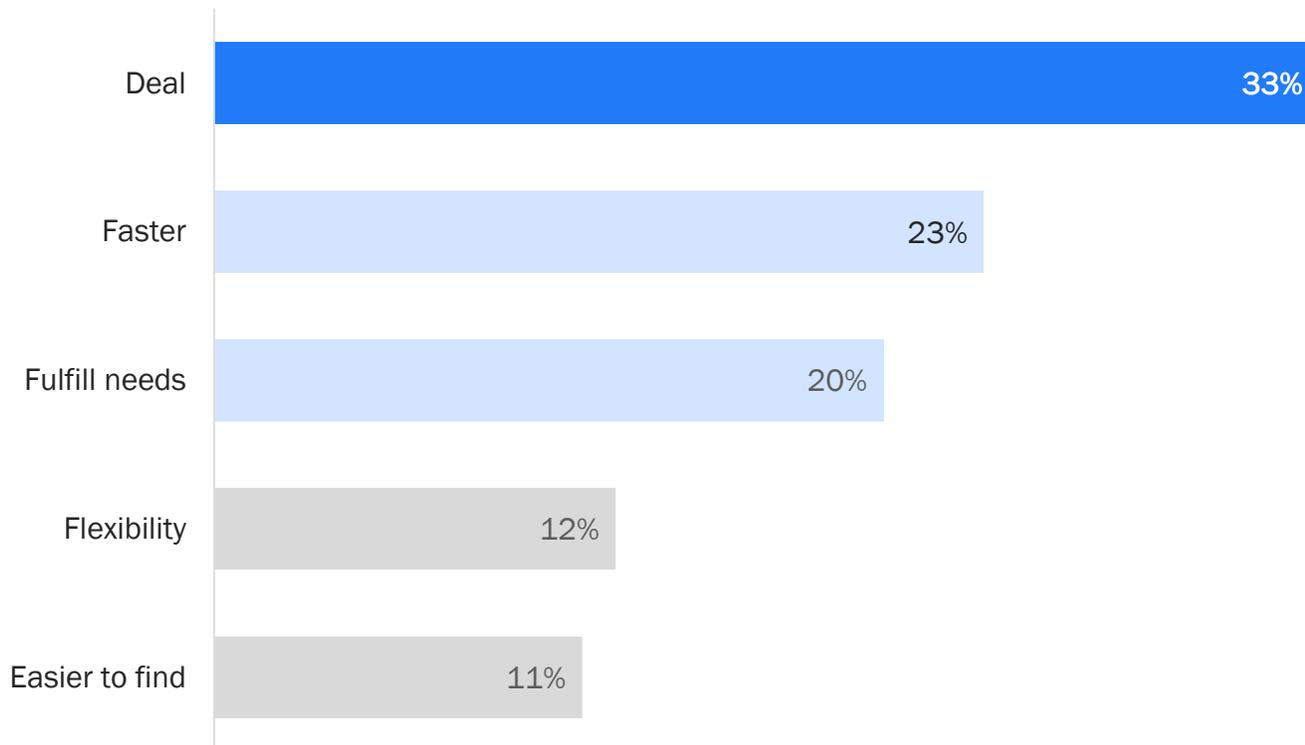


Insight Eleven

Value is the most important factor in combo meal purchases



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



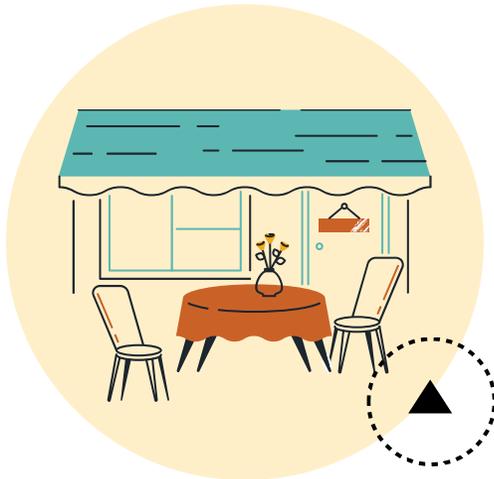
Deep Dive

By focusing on **value** (deal), **convenience** (faster) and **product offering** (fulfill needs), restaurants can **keep customers happy.**

Summary of Insights

Dining Out Intentions

1. In general, **good food** and **socialising** are the main drivers to dine out.
2. **Atmosphere** and **cuisine style** are the top factors when choosing where to dine out.
3. Guests look forward to **more lazy evening meals** than business lunches when dining out.



Restaurant Services & Technology

4. When eating out at restaurants, guests expect to **continue seeing safety precautions** in place.
5. **Paying the bill** is now the #2 reason respondents prefer to use technology in restaurants.
6. Respondents believe the use of technology **reduces Covid-19-related risks** and **limits human contact**.

Summary of Insights

Consumer Price Perceptions

7. **2 in 5** respondents **spend more on restaurants** in an average week now compared to 3 months ago.
8. **Almost 40%** of respondents list **higher prices** and **ordering more often** as reasons for spending more.
9. Most respondents believe **increased food costs** justify price increases.

Quick Service & Combo Meals

10. **More than 3 in 5** respondents **purchased a combo meal** from a quick-service restaurant in the past month.
11. **Value** is the **most important factor** in combo meal purchases.



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