Revenue Management Solutions

Restaurant Consumer Insights

Summer 2021 – France Edition

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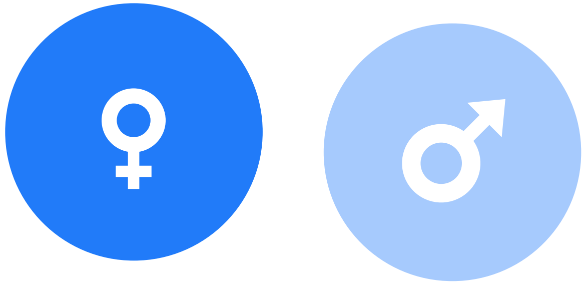
About the survey

RMS surveyed 1,263 participants across three European markets from June 24 - 30, 2021. This report examines the results specifically from France (n=408).

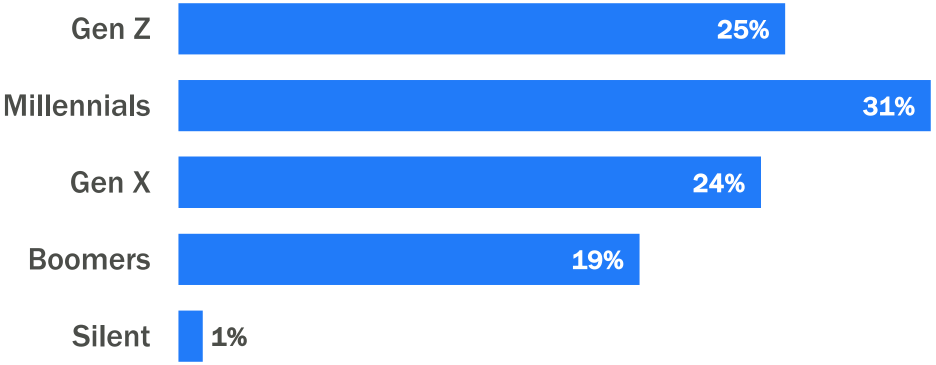
Gender



64%
Female

36%
Male

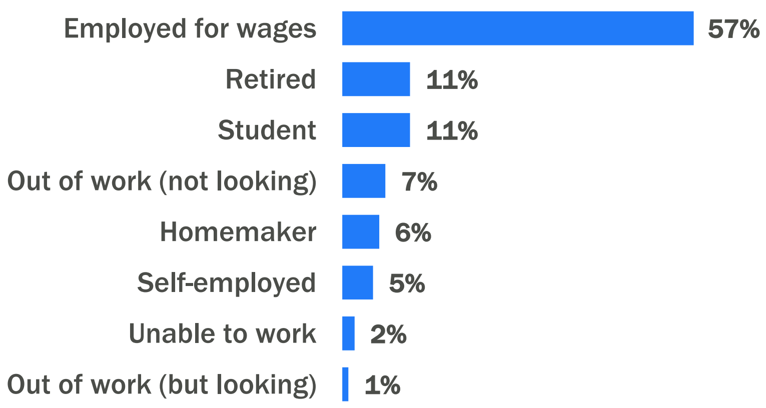
Generation



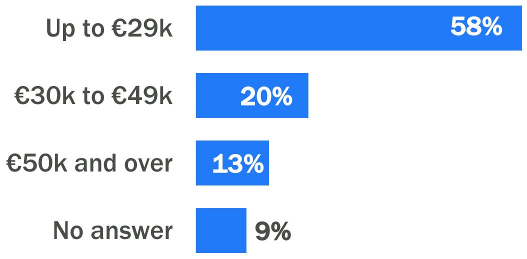
Respondent breakdown

RMS surveyed 1,263 participants across three European markets from June 24 - 30, 2021. This report examines the results specifically from France (n=408).

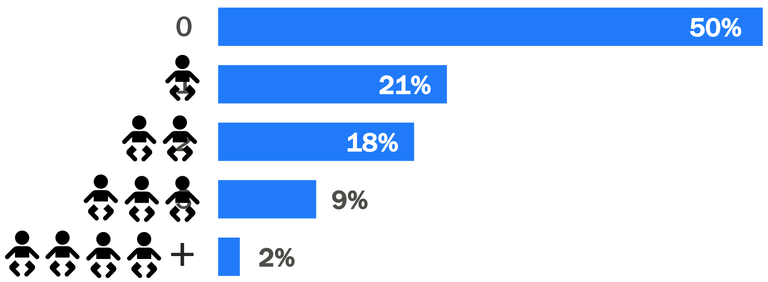
Employment status



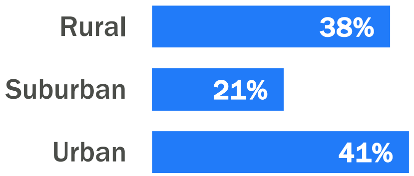
Household Income



Household size



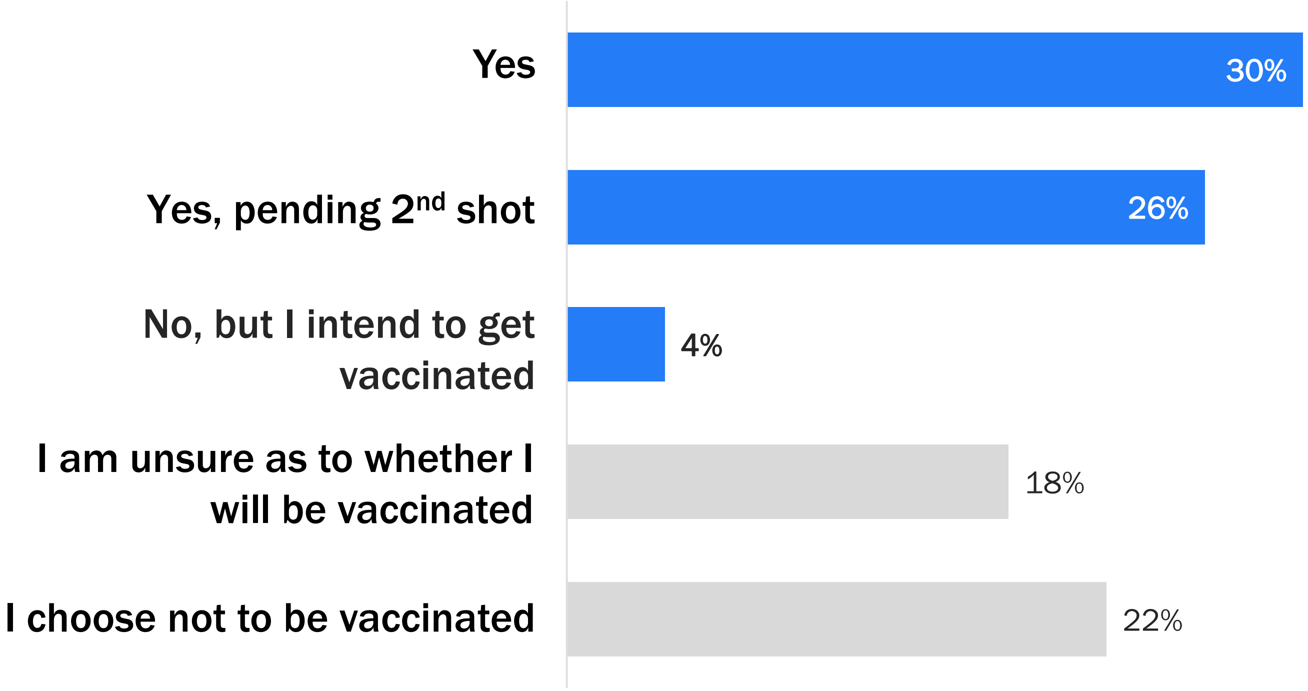
Geographic area



Where Are We Now

60% of respondents have been or plan on getting vaccinated

Have you received the COVID-vaccine?



Deep Dive

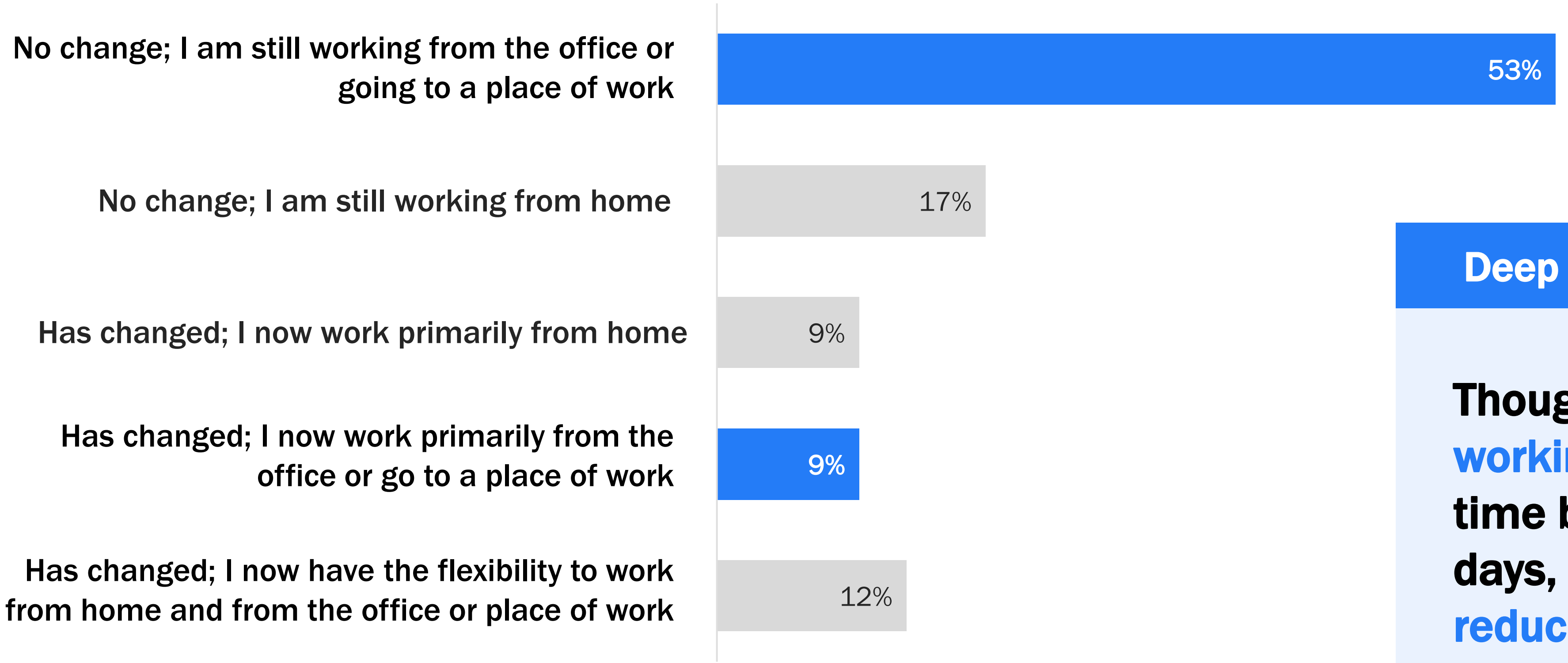
Boomers and Gen X make up 67% of those fully vaccinated.

Anti-vaccine sentiment is strongest amongst millennials, as 32% of them do not want to get vaccinated.

June 2021 n=408

More than 60% of employed respondents are again commuting to an office or workplace full time

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



Deep Dive

Though 38% are still working from home full-time basis or on certain days, therefore significantly reducing lunch traffic for restaurants.

June 2021 n= 253

Almost 50% of households are still 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	46%
Not being able to do things I want to do	36%
The emotional/mental health of my household	35%
Members of my household becoming infected	35%
Not being able to celebrate milestones with friends/families	31%
Having the financial means to feed my family	24%
Keeping up with frequent changes in government guidelines	20%
The economic impact on local business in my community	18%
Maintaining current employment	18%
Not being able to dine out in restaurants	18%
Keeping my children occupied and active during the pandemic	14%

June 2021 n=408

Deep Dive

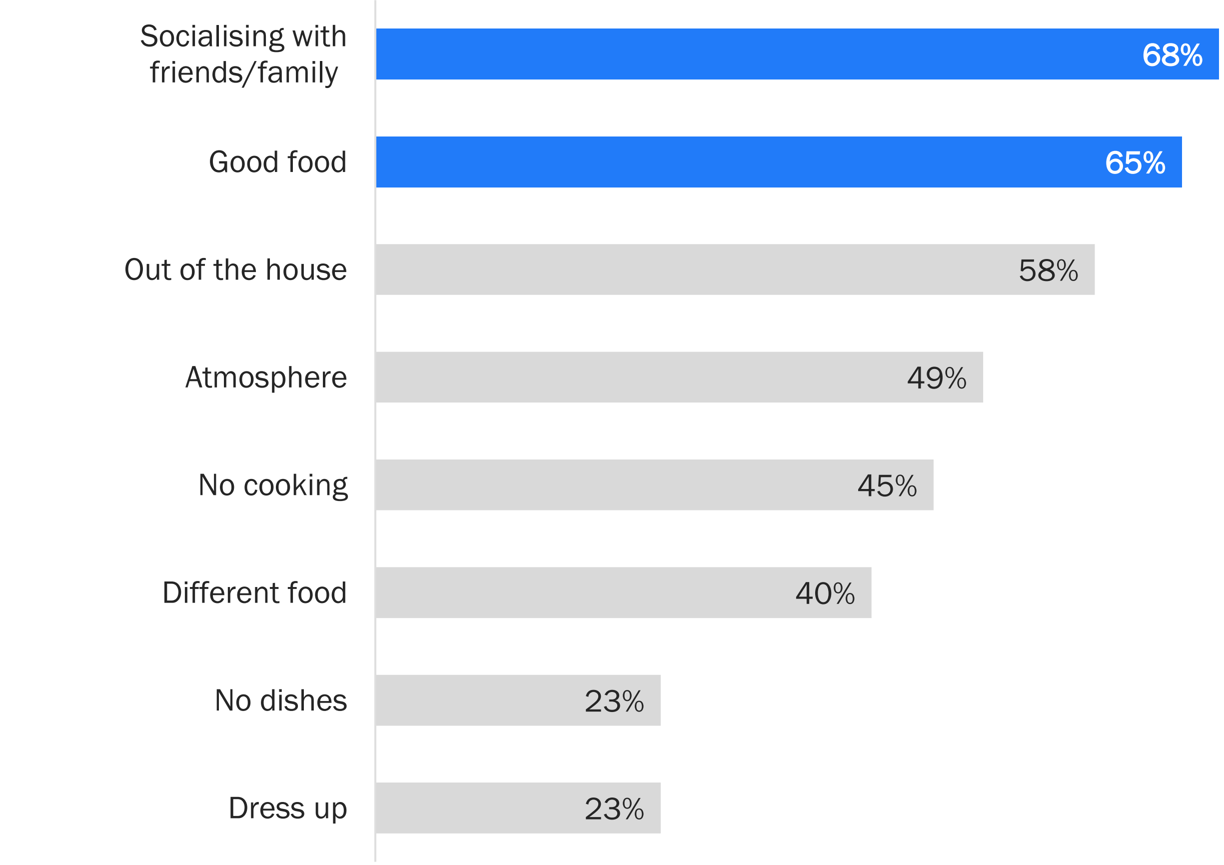
Self-fulfillment ("not being able to do the things I want to do") and the mental health of family members are also top of mind concerns for French households.

Dining Out Intentions

Insight One

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

What do you like the most about eating out?



June 2021 n=408

Deep Dive

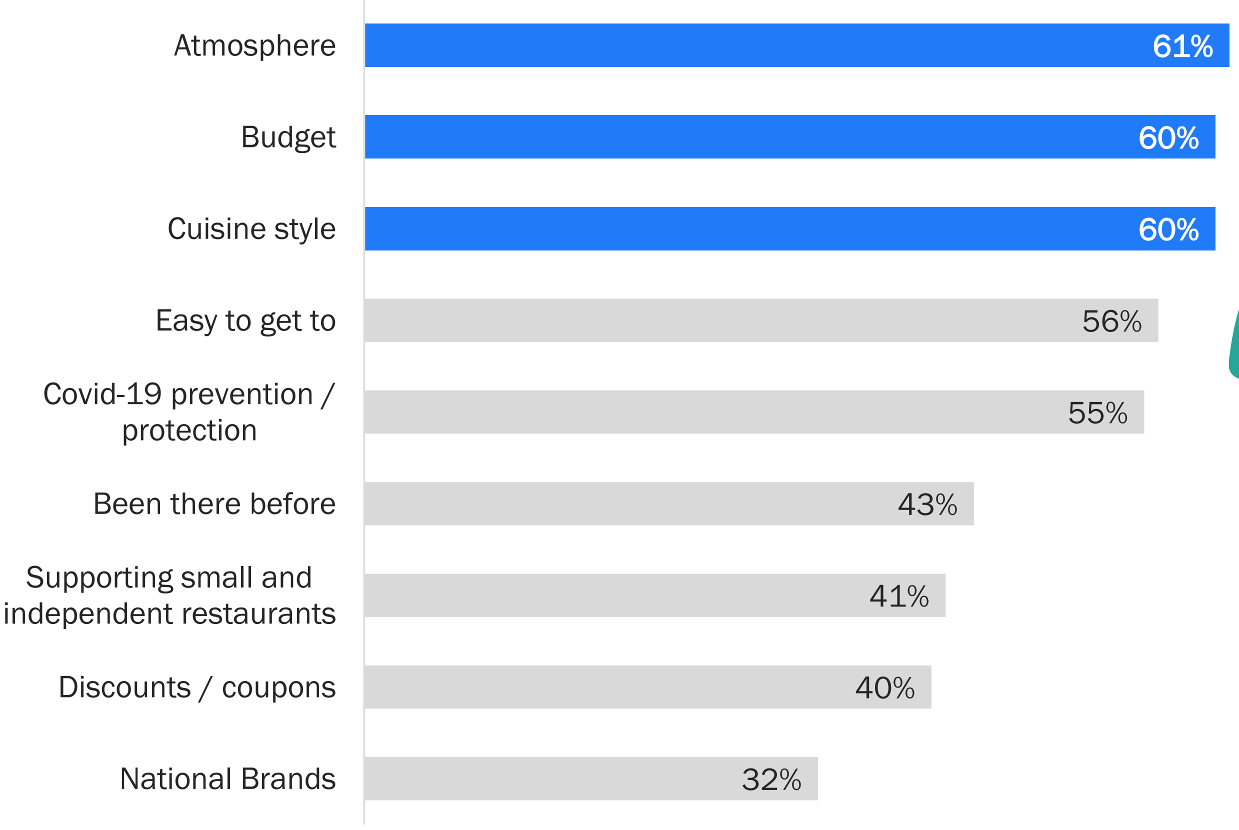
The desire to get out of the house and the atmosphere of the restaurant are most important to Gen Z.

While boomers have a stronger desire to try different foods.

Insight Two

Atmosphere, budget 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?



June 2021 n=408

Deep Dive

Discounts are more important to younger generations (Gen Z & millennials) and family households.

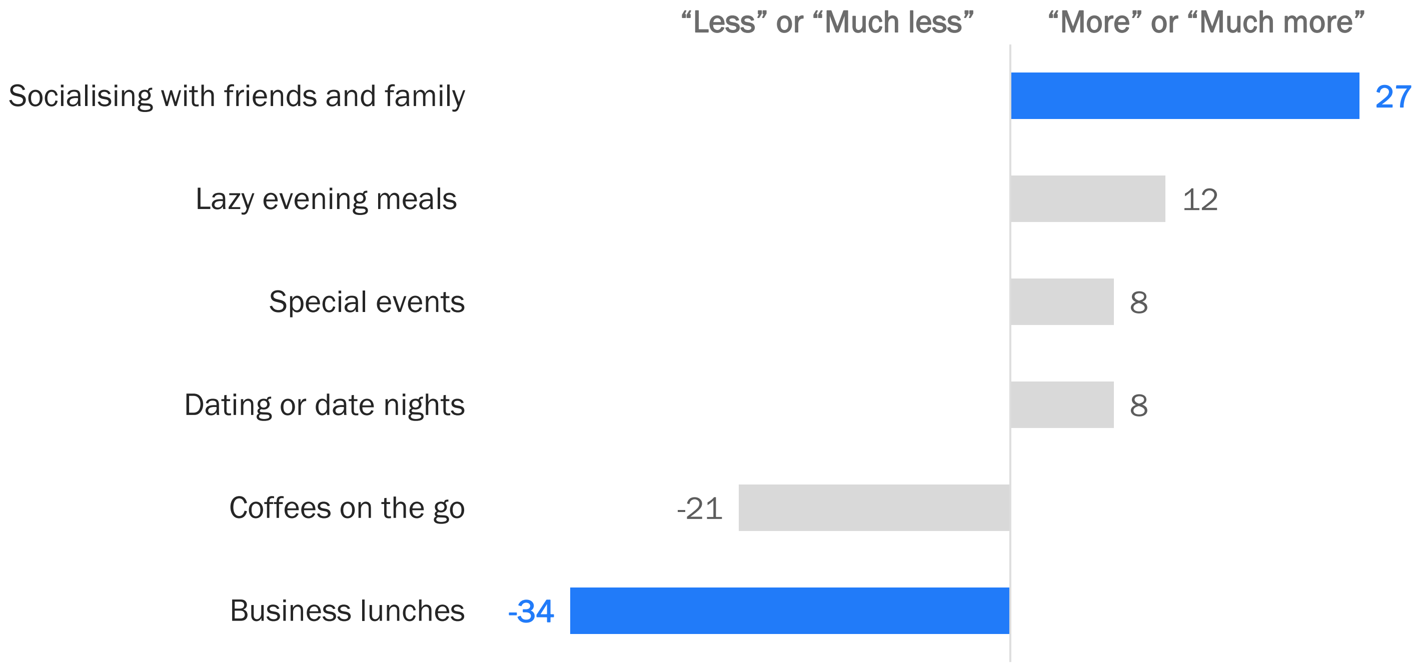
Gen Z is less likely to support locally owned, independent restaurants. Only 36% consider it an important factor versus 48% of boomers.

Insight Three

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=408

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

Deep Dive

Gen Z is particularly eager to return to restaurants to either socialise or for lazy evening meals.

Intentions for business lunches and coffee on the go are low even amongst employed respondents.

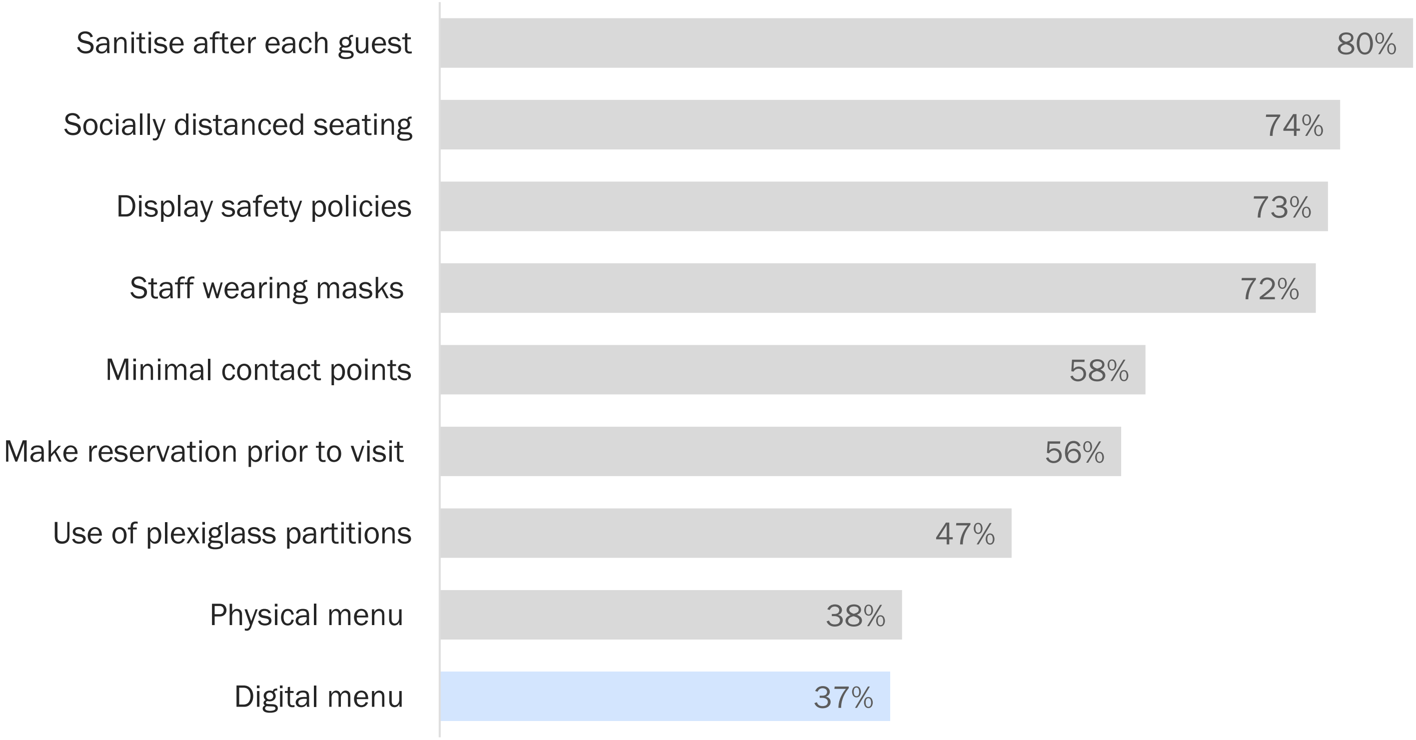
Restaurant Services & Technology

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"



June 2021 n=408

Deep Dive

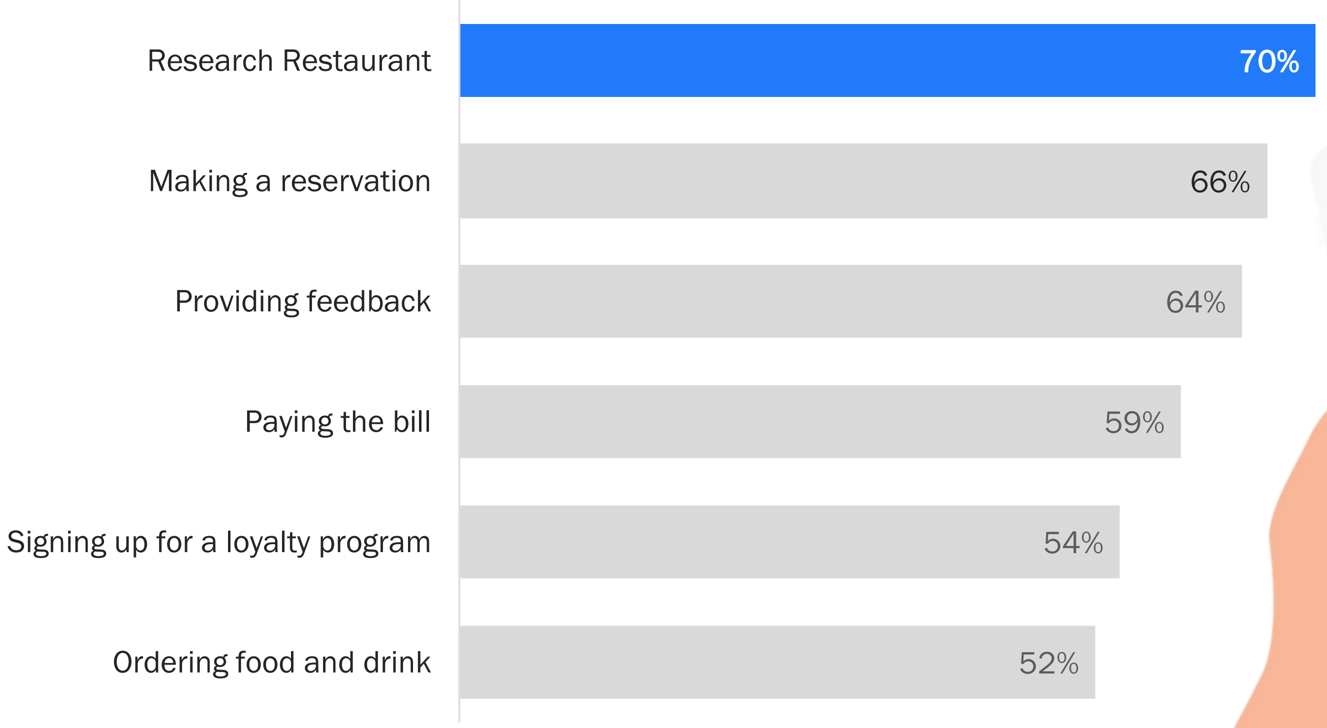
Overall, consumers no longer expect to order from digital menus, as only 37% indicated that they "agreed" or "strongly agreed" with the statement.

Insight Five

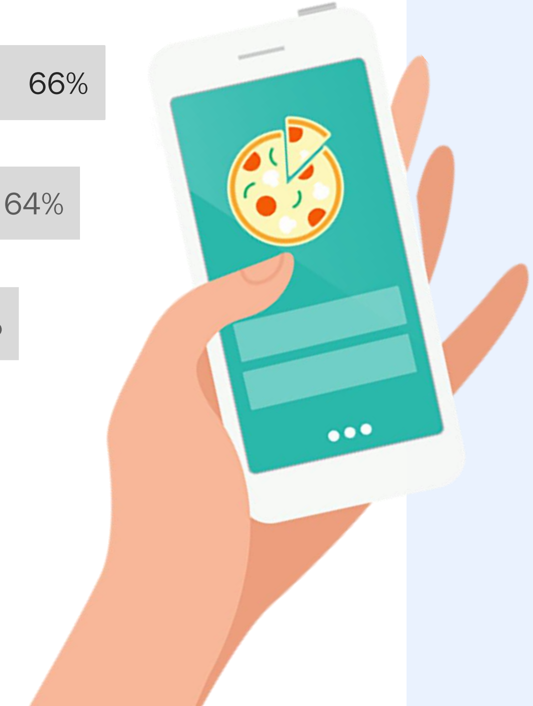
Technology is mostly used to research the restaurant prior to visiting, indicating that digital presence is key

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

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



June 2021 n=408



Deep Dive

Not surprisingly, the use of technology at restaurants is more accepted by younger generations.

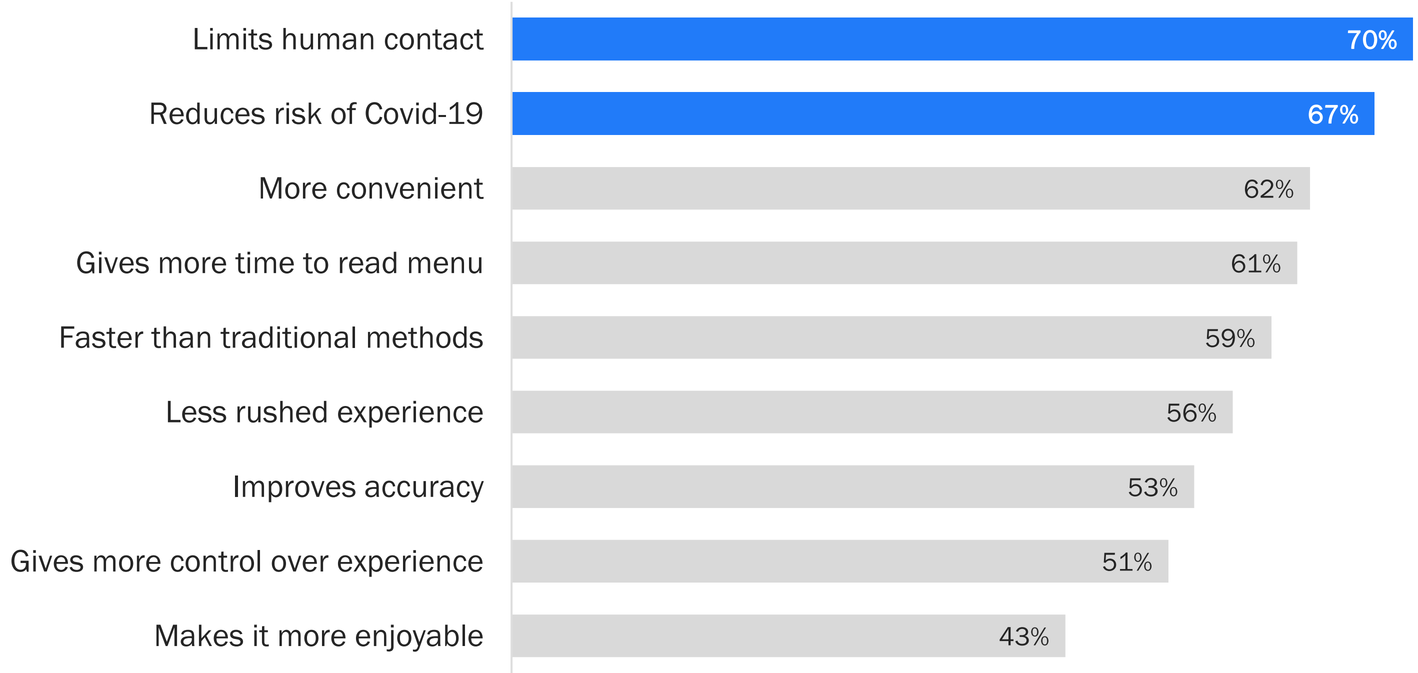
63% of Gen Z prefers the use of automated technology to **place an order** vs. 43% of boomers.

Insight Six

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=408

Deep Dive

Gen Z believes that technology makes their experience more convenient, more accurate and faster.

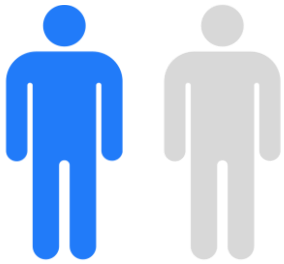
1 in 2 **family households** believes that the use of technology **improves the overall experience.**

65% of family households find that technology gives them **more time to explore the menu.**

Consumer
Price Perceptions

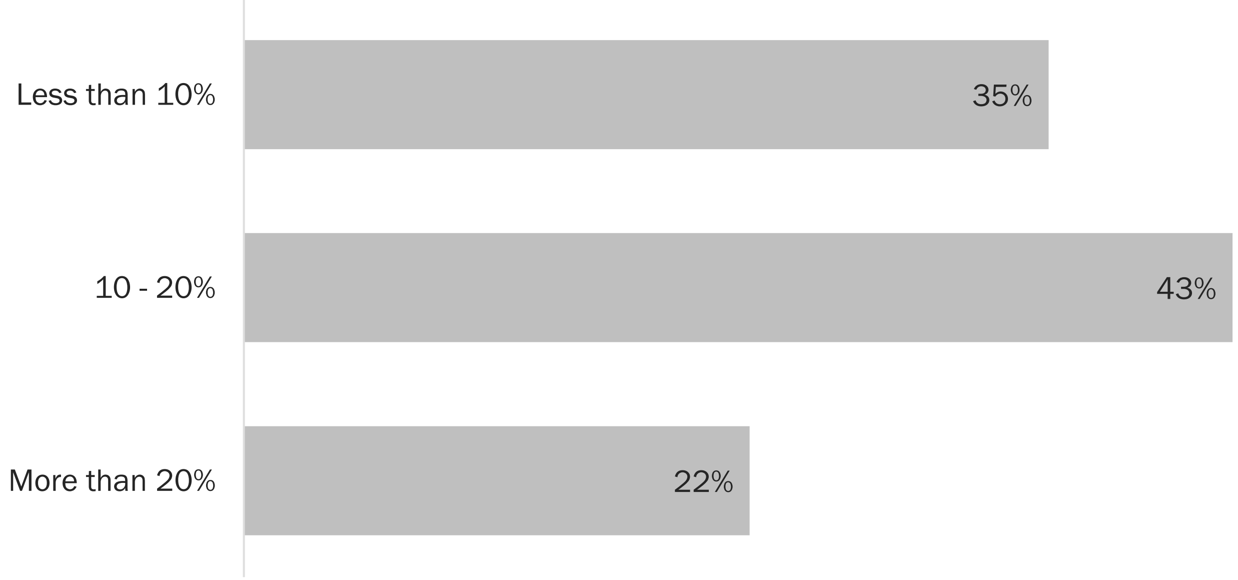
Insight Seven

1 in 2 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:

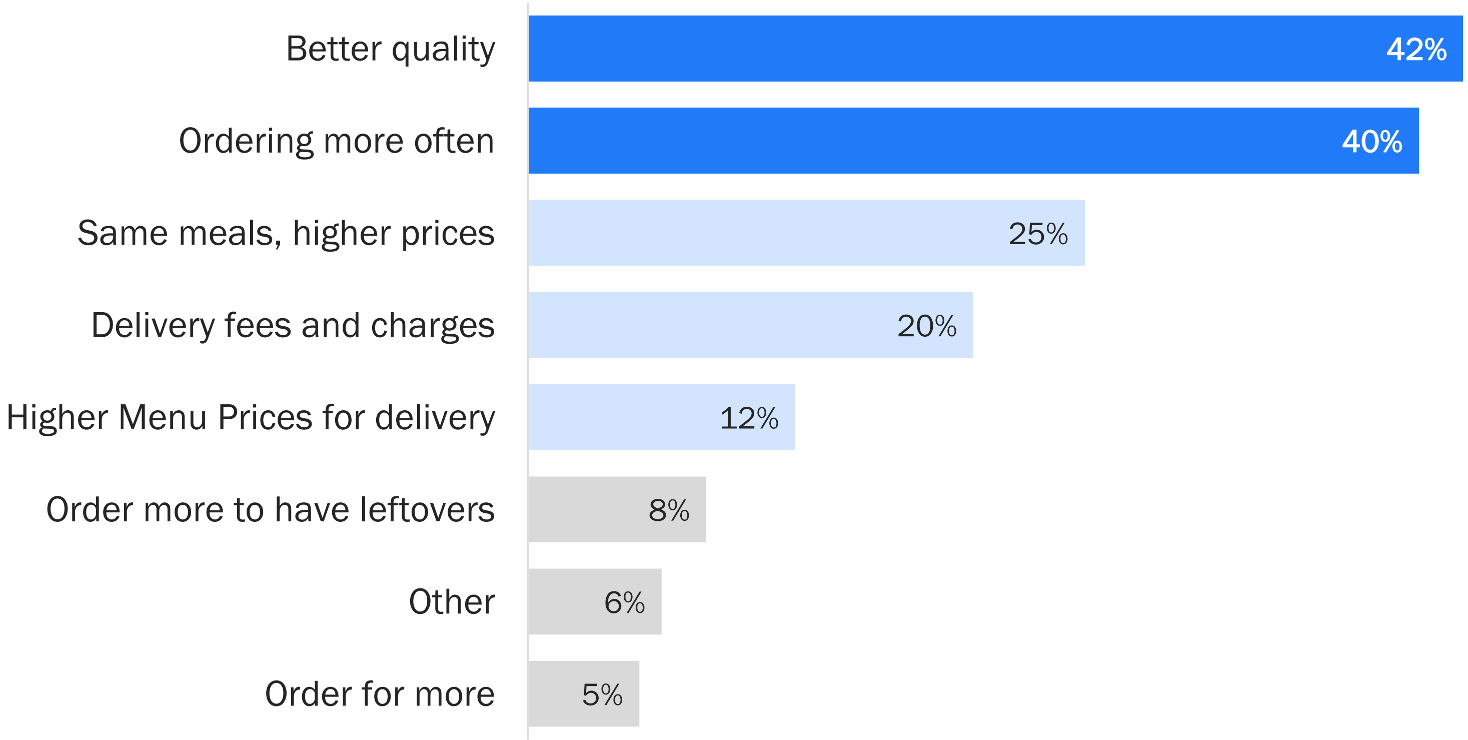


June 2021 n=199

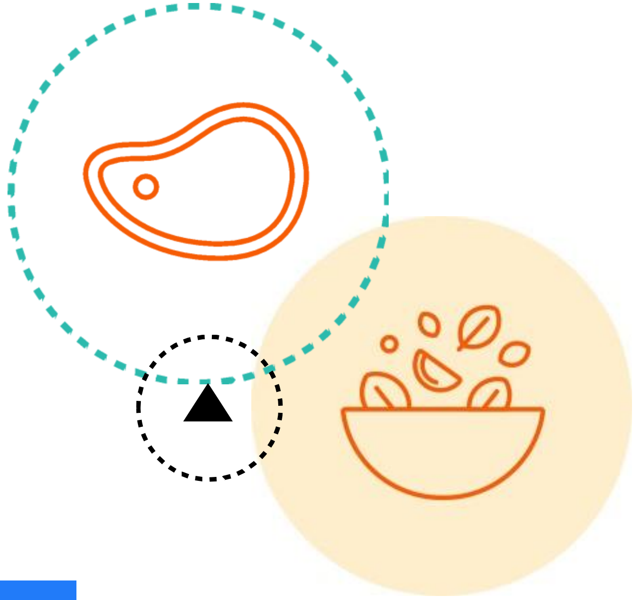
Insight Eight

Around 40% list better quality and ordering more often as reasons for spending more

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



June 2021 n=199



Deep Dive

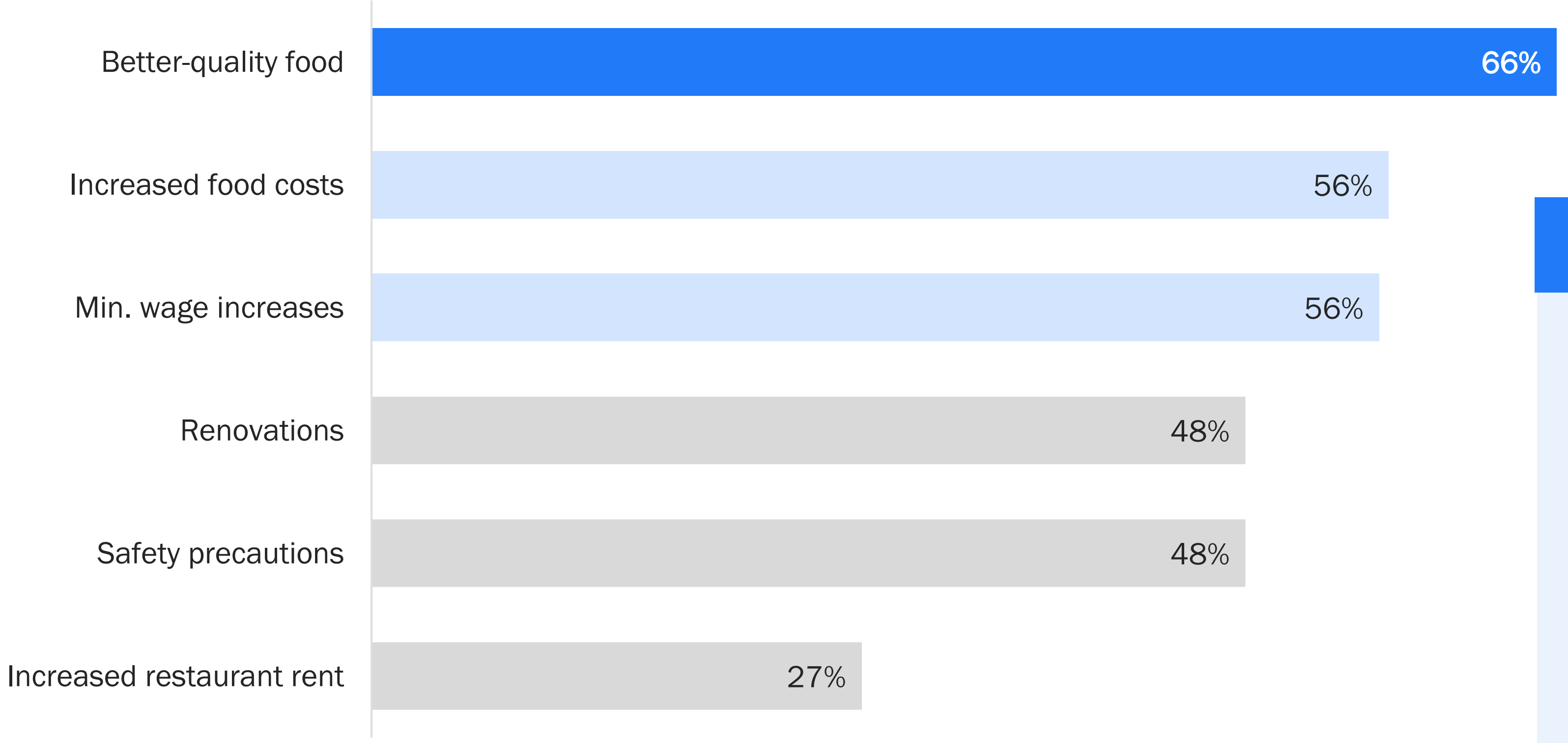
32% associate higher spend with delivery (delivery fees & charges + higher menu prices for delivery).

25% stated they are noticing higher prices.

Insight Nine

Most respondents believe serving better-quality food & ingredients 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=199

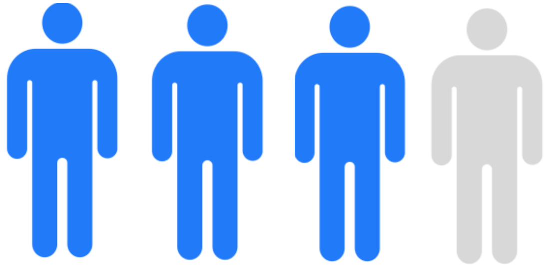
Deep Dive

Food and labour cost increases are also justifiable reasons accepted by most respondents.

Quick Service & Combo Meals

Insight Ten

Almost 3 in 4 respondents purchased a combo meal from a quick-service restaurant in the past month



92% of **Gen Z** and **83%** of **millennials** purchased a combo meal from a QSR in the past month, while only **69%** of **Gen X** and **43%** of **boomers** did the same.

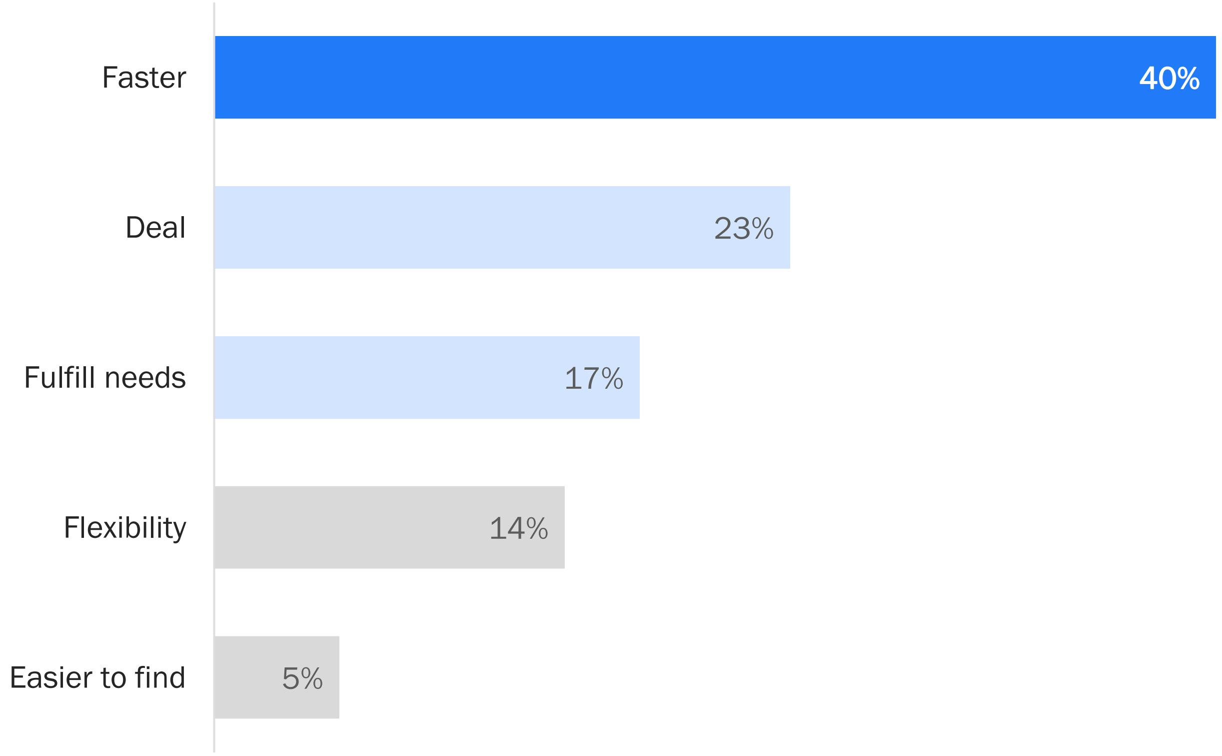
85% of **family households** purchased a combo meal from a QSR in the past month, while **64%** of **single households** did the same.

June 2021 n=302

Insight Eleven

Surprisingly, speed is the most important driver for purchasing combo meals, not value

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



June 2021 n=302

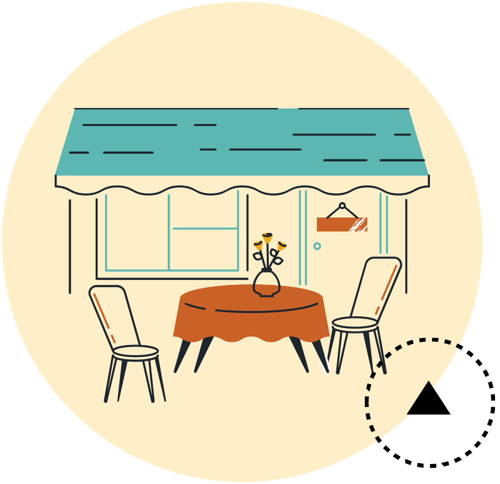
Deep Dive

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

Summary of Insights

Dining Out Intentions

1. In general, socialising and good food are the main drivers to dine out.
2. Atmosphere, budget and cuisine style are the top factors when choosing where to dine out.
3. Guests want to socialise more with family & friends than with business partners when dining out.



Restaurant Services & Technology

4. When eating out at restaurants, guests expect to continue seeing safety precautions in place.
5. Technology is mostly used to research the restaurant prior to visiting, indicating that digital presence is key.
6. Respondents believe the use of technology limits human contact and reduces Covid-19-related risks.

Summary of Insights

Consumer Price Perceptions

7. 1 in 2 respondents spend more on restaurants in an average week now compared to 3 months ago.

8. Around 40% list better quality and ordering more often as reasons for spending more.

9. Most respondents believe serving better-quality food & ingredients justify price increases.

Quick Service & Combo Meals

10. Almost 3 in 4 respondents purchased a combo meal from a quick-service restaurant in the past month.

11. Surprisingly, speed is the most important driver for purchasing combo meals, not value.

Revenue Management Solutions

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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.

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