Fāilte Ireland
National Tourism Development Authority

Out of Home Eating National Survey 2020

Combined quantitative & qualitative report

January 2020 Ref: J.202296

B&A RESEARCH & INSIGHT

RESEARCH BACKGROUND & OBJECTIVES

The food and beverage sector has been greatly impacted by lockdowns and restrictions imposed due to Covid-19. The ability of businesses to pivot and adapt during this time has been crucial to the survival of many.

BACKGROUND

Consumer behaviour has adapted quite considerably during this period and while traditional occasions of eating in restaurants and pubs are understandably down, new outdoor, takeaway and in-home occasions have developed.

PROJECT AIM

The team at Fáilte Ireland, in their remit to support the tourism and leisure sector, are now keen to understand consumer behaviour, changing attitudes and preferences around eating out and ordering in.

RESEARCH OBJECTIVE

To inform the food and beverage sector of changes in consumer behaviours, attitudes, and preferences to eating-out during Covid-19 and how the sector can best adapt to these changes.

RESEARCH METHODOLOGY

HOW

Combined quantitative & qualitative approach:

- 1032 online interviews using B&A's online Acumen.ie panel
- 3 online focus groups; 2 x consumer & 1 x trade

WHEN AND WHERE

- Qualitative interviewing was conducted from the 25th -26th November 2020.
- Quantitative interviewing was conducted from 8th – 14th December 2020

CRITERIA

Fáilte Ireland detailed very specific recruitment criteria for respondents:

- Adults 18+
- Resident in ROI
- All to have eating out of home or ordered in at least once during 2019

Insights

1. Basic pattern of pre & post Covid motivations is largely consistent - taste is king, with primacy also given to relaxing in a social setting; post Covid there is a stronger emphasis on different experience (break from enforced routine).

2. Since Covid - Consumers are understandably more anxious about eating out in city centres and indoor venues, while the desire to support local is prominent.

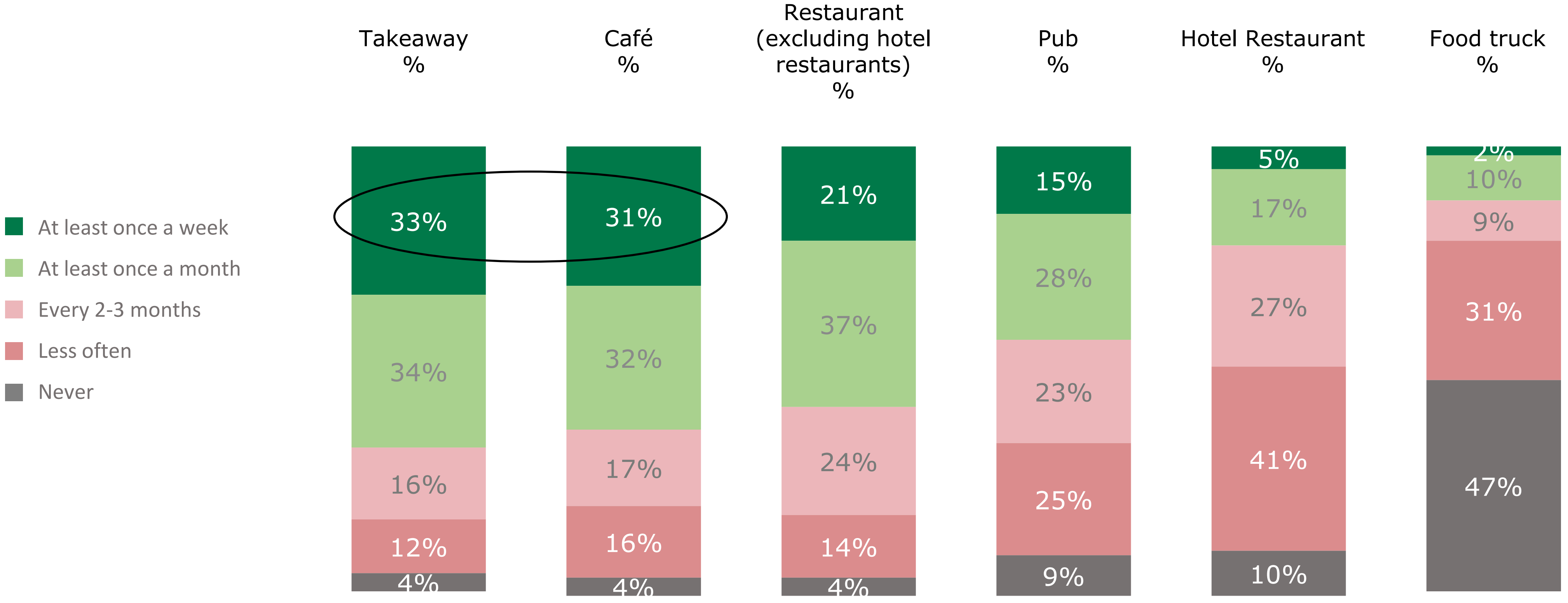
3. Almost half of consumers have eaten outside since March: evaluation is fairly positive. Future willingness varies by season with keeping customers warm & dry the key consideration (desire for warmth likely has broader meaning that temperature alone – type of food, drinks and décor).

4. Post Covid - consumers on balance project a return to 'normal': less usage of takeaways and a return to eating out; future takeaway use likely dominated by 'traditional' providers - but 1 in 4 do project using restaurant takeaways (43% used during 'Reopening')

5. Post Covid - consumers also show considerable openness to continued usage of Covid driven service innovations – including mid-week discounts, food ordering apps, click & collect, Sunday roasts & pre drinks outdoors.

PRE COVID-19: EATING OUT OF & AT HOME

Pre Covid more than 30% of Irish consumers were weekly users of takeaways and cafes – with strong usage rates across all main eateries

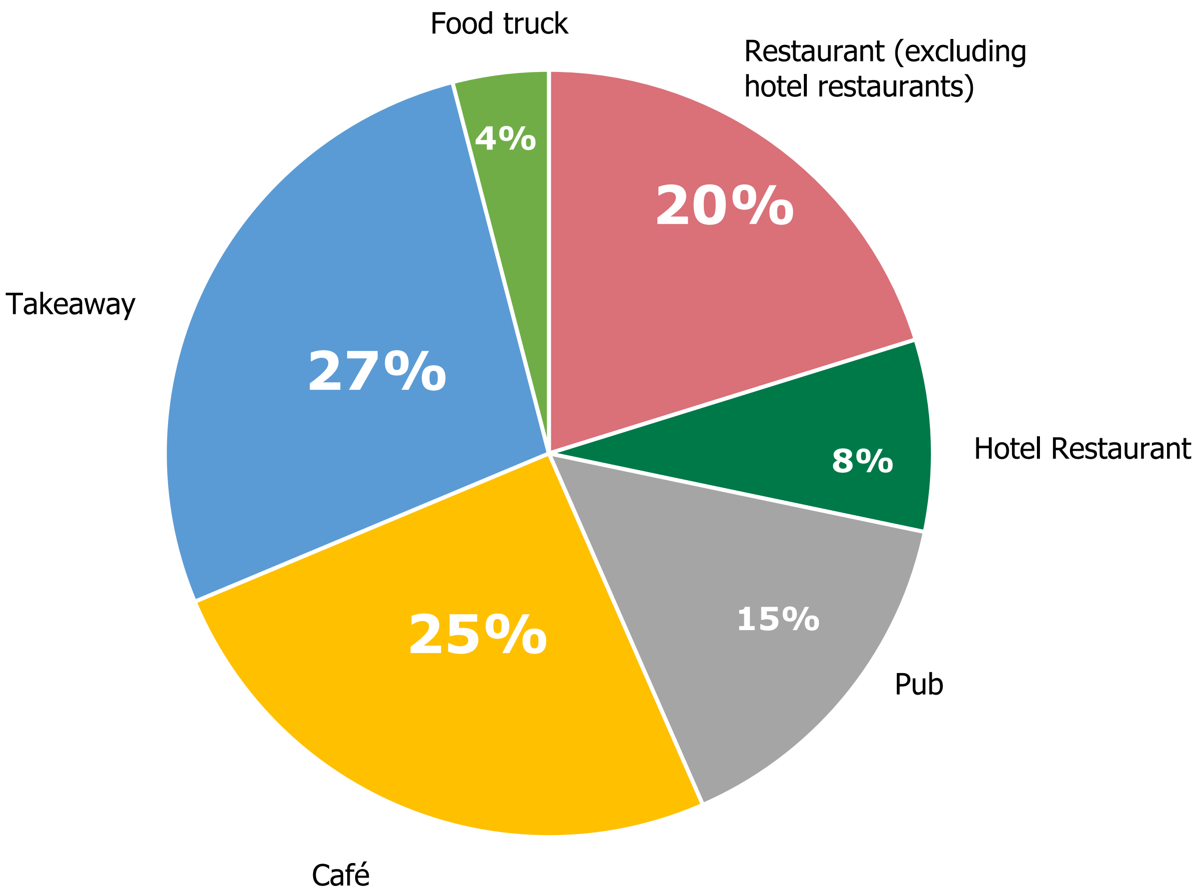


Monthly +	68	63	58	43	22	12

Base: All Irish adults who ate out or ordered in during 2019 n- 1032
Question text: QB. Prior to the start of the Covid-19 crisis in Ireland, how frequently did you eat out or order a meal from each of the following types of food venues

Pre Covid the big three eateries accounted for 72% of eating out / ordering in occasions

% Share prior to Covid



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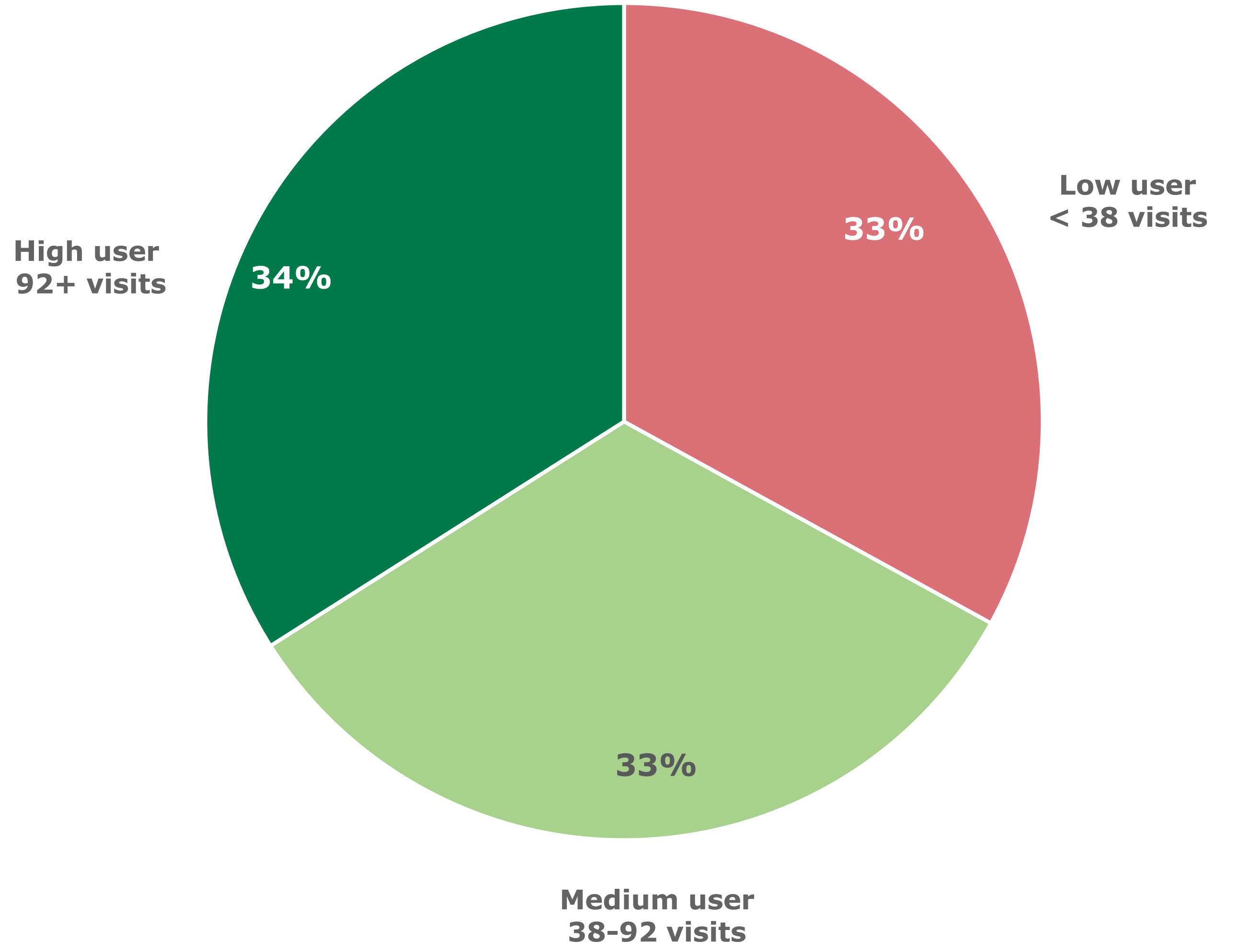
Question text: QB. Prior to the start of the Covid-19 crisis in Ireland, how frequently did you eat out or order a meal from each of the following types of food venues

Pre Covid-19 – Eatery consumers were evenly distributed across high, medium & low users.



Base: All Irish adults who ate out or ordered in during 2019 n- 1032
Question text: Qb Score

Who are the pre – Covid user groups?
Little demographic variations, albeit low users more likely older and C2DEs.
High users are also high domestic breakers

Low user

33%

- Aged 55+
- More blue collar (C2DE)
- Least likely to be a domestic breaker last 12 months

Med user

33%

High user

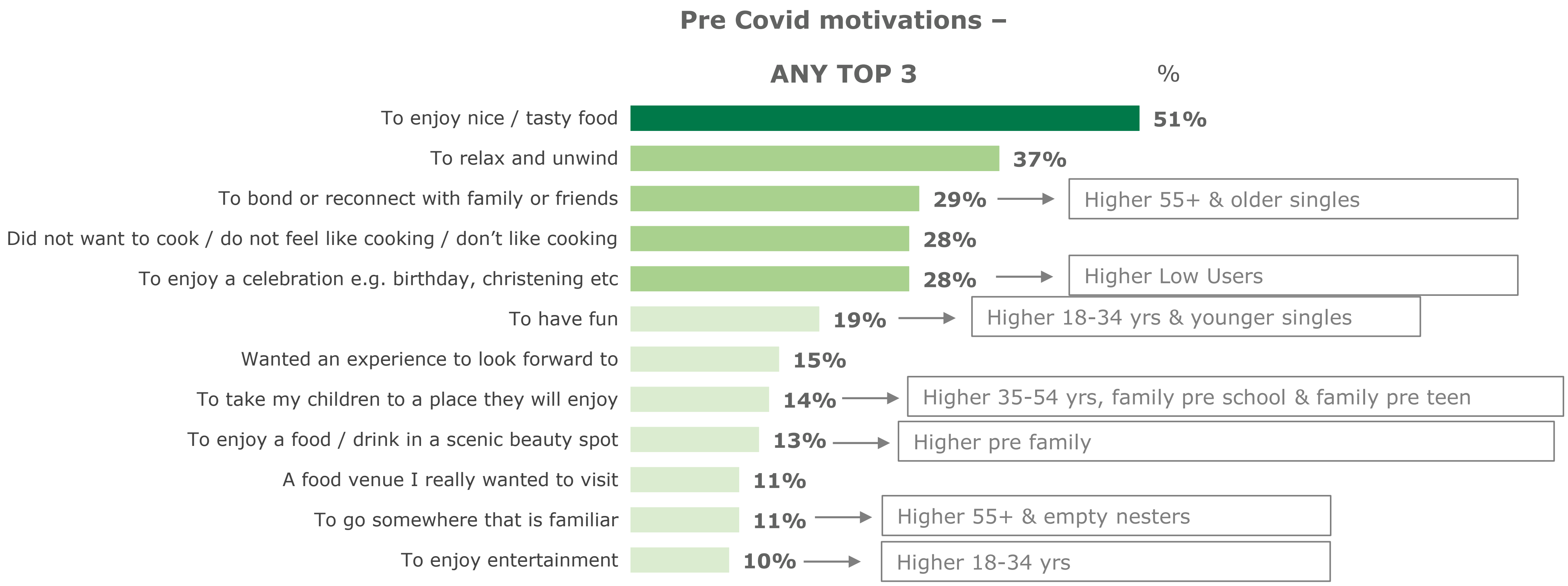
34%

- Most likely to be a domestic breaker since Covid-19

Low users are also least likely to have taken a domestic break in the last 12 months, while high users are most likely to have had a staycation during 2020.

Base: All Irish adults who ate out or ordered in during 2019 n- 1032
Question text: Q.B Score

Taste is king; relaxing in a social setting also a key pre Covid consumer motivation



All others less than 10%

Base: All Irish adults who ate out or ordered in during 2019 n- 1032
Question text: Q.1 Prior to the start of the Covid-19 crisis, which of the following were the five most important motivations for eating out or ordering in during 2019? ANY TOP 3

COVID-19: EATING AT/ OUT OF HOME

Basic pattern of Pre & Post Covid motivations is largely consistent; albeit stronger Post Covid emphasis on *different experience* (*break from enforced routine*)

Pre Covid motivation –

ANY TOP 3

%

All others less than 10%

Post Covid motivation
All adults
46% (-5%)
33% (-4%)
27% (-2%)
28% (=)
24% (-4%)
20% (+1%)
19% (+4%)
12% (-2%)
9% (-4%)
9% (-2%)
12% (+1%)
9% (-1%)

Base: All Irish adults who ate out or ordered in during 2019 n- 1032
Question text: Q.12 Since the Covid-19 pandemic which of the following are the five most important motivations for eating out or ordering in?

THE QUALITATIVE WORK SUGGESTS THAT KEY DRIVERS FOR EATING OUT/ORDERING HAVEN'T CHANGED SIGNIFICANTLY

- However, the desire to support **local** IS new and was talked about a lot.

Otherwise, most of the drivers are fairly familiar:

- Desire to have a good time with friends/family.
- Treat.
- Try new things.
- Sick of cooking.
- Celebration
- Event to look forward to.

While these drivers are not new, they have been heightened by time spent in lockdown – there is strong pent-up demand for restaurant/café/gastro pub experiences.

"

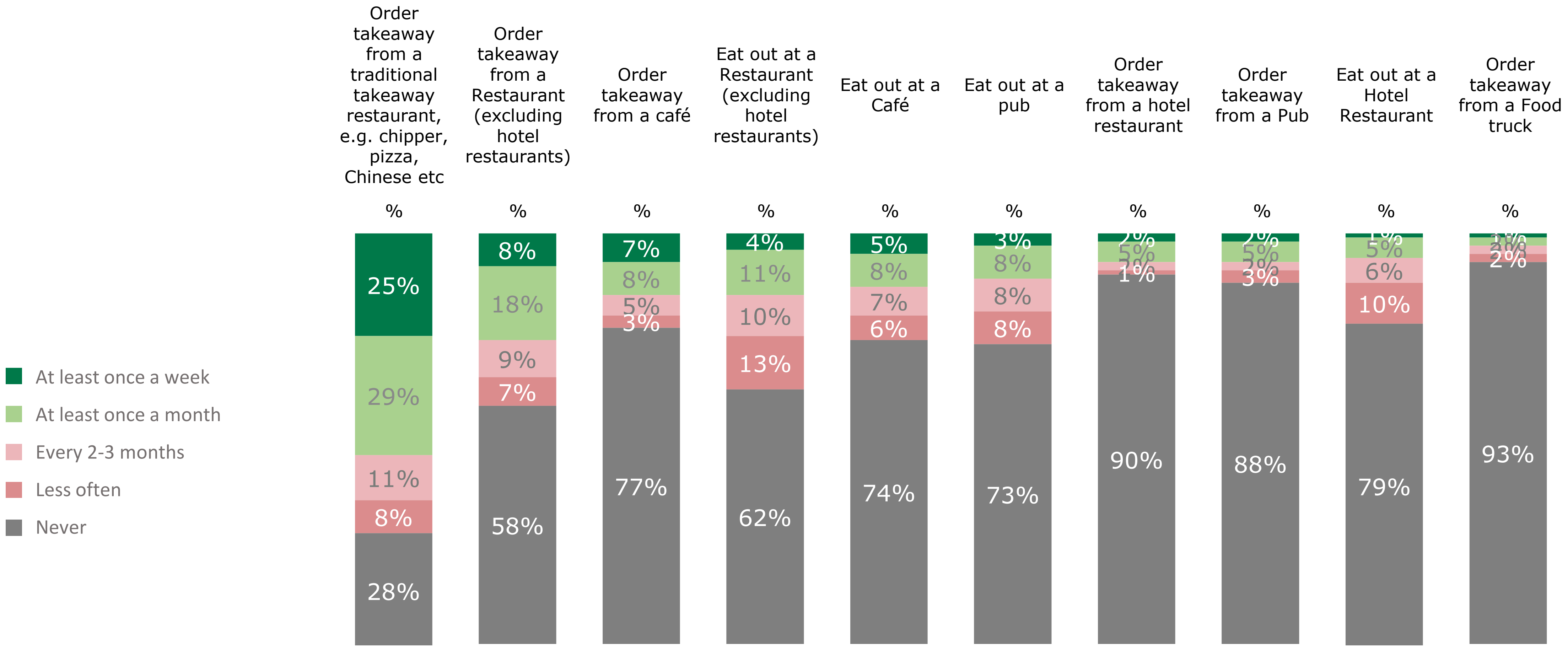
I just want to go out and have a good time with my friends again. It's not more complicated. But I will certainly appreciate it a lot more when I can finally get back to my favourite places. There is so much we took for granted.

Consumer, Under 40

During lockdown (one), I cooked every single meal my family ate. I can't tell you how much I looked forward to eating something that I hadn't made myself

Consumer, Over 40

'Reopening Stage' - 'Takeaways' now comprise the big three consumer options

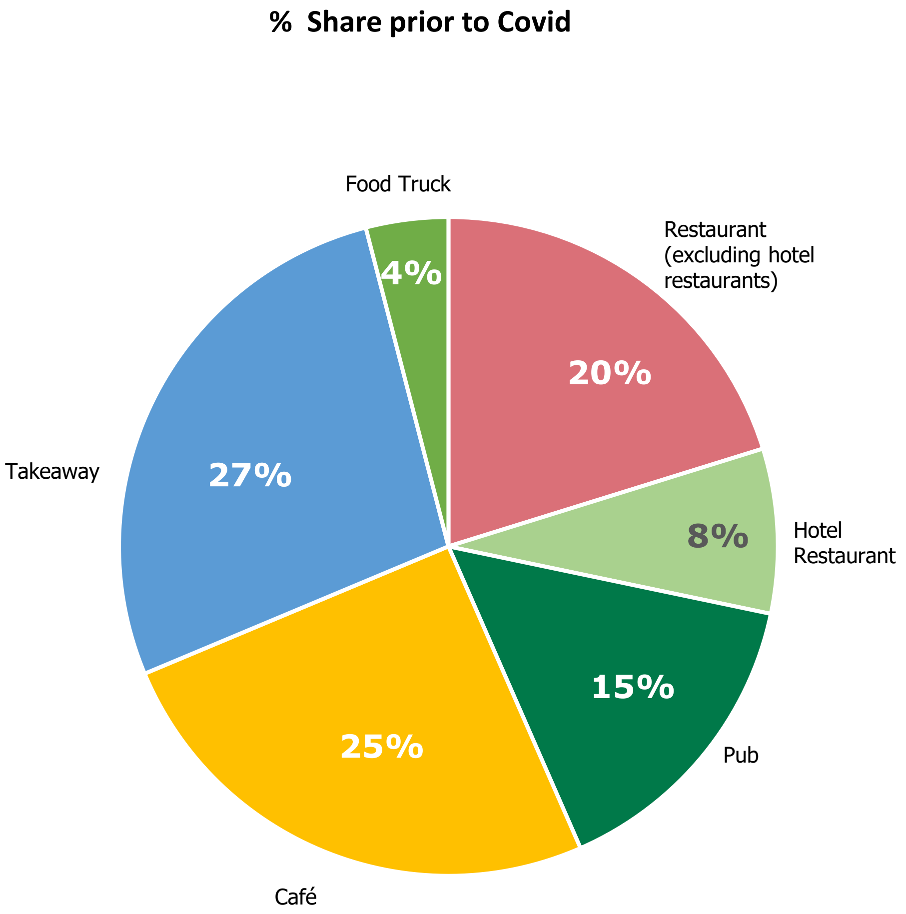


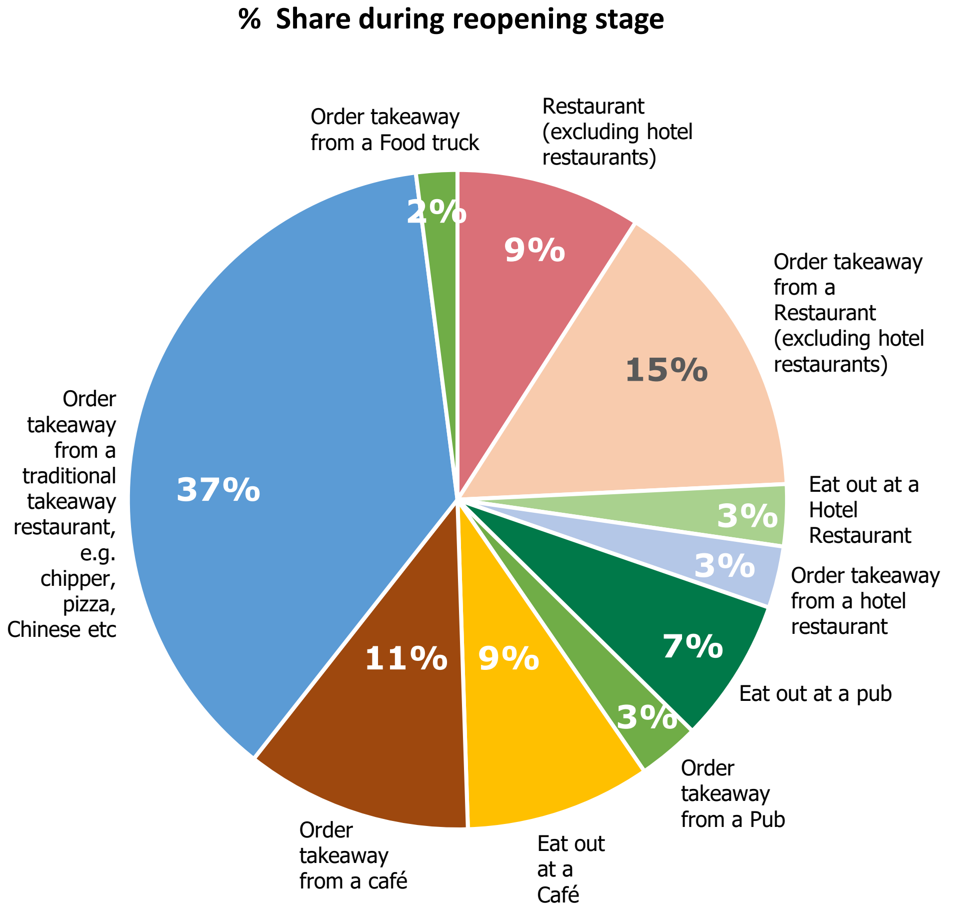
MONTHLY+	53%	26%	15%	15%	13%	11%	6%	6%	5%	3%
EVER	72%	43%	23%	28%	26%	27%	10%	12%	21%	7%

Base: All Irish adults who ate out or ordered in during 2019 n- 1032

Question text: Q2b Some of these services were not available during certain periods of the Covid 19 lockdown restrictions, but generally when available, how frequently would you say you did this during the Covid 19 pandemic?

'Reopening Stage' - Takeaway share of market now 71% (up from 27%)





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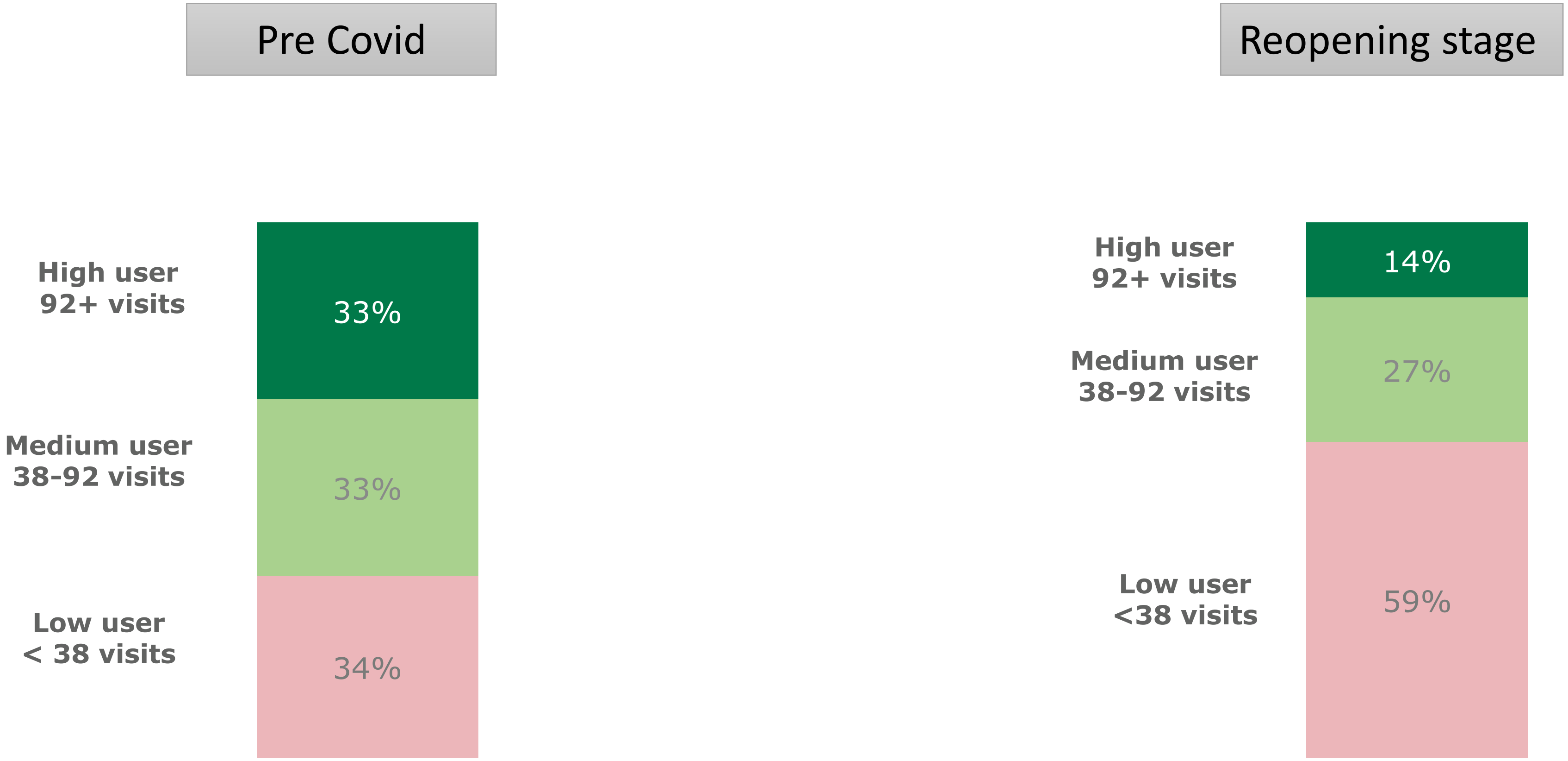
Question text: QB. Prior to the start of the Covid-19 crisis in Ireland, how frequently did you eat out or order a meal from each of the following types of food venues

Q2b Some of these services were not available during certain periods of the Covid 19 lockdown restrictions, but generally when available, how frequently would you say you did this during the Covid 19 pandemic?

'Reopening Stage' - only 14% of consumers now qualify as 'High Users'



Base: All Irish adults who ate out or ordered in during 2019 n- 1032
Question text: Q.2B Score

Little change in demographic profile of user groups pre Covid vs 'Reopening Stage'

Low user

Med user

High user

Pre Covid-19

Low user: 33%

- Aged 55+
- More blue collar (C2DE)
- Least likely to be a domestic breaker last 12 months

Med user: 33%

High user: 34%

- Most likely to be a domestic breaker since Covid-19

Post Covid-19

Low user: 59%

- Aged 55+
- More Rural
- Empty nester & older singles
- Least likely to be a domestic breaker last 12 months

Med user: 27%

High user: 14%

- Family pre teen
- Most likely to be a domestic breaker since Covid-19

During the lockdown and re-opening stage, consumers started using favourite establishments in different ways

- Getting takeaway/meal kits from restaurants where they used to 'sit in'.
- Frequenting food trucks for new meal occasions and in different locations.
- Shopping for food in local cafes that have turned themselves into farmer's markets.
- Getting takeaway pints/cocktails from bars rather than sitting in.
- Going for food and drink in the pub rather than just drinks.
- Buying nicer food in supermarkets and delis for picnics and eating later at home.

If these behaviours continue to fulfil needs, then there is a good chance they will be maintained. Some are obvious stop gap solutions (takeaway pints in December), others may not have longevity for the wider population but there will be opportunities with more niche groups. So, meal kits may not prevail long term for those in their 20's, but parents of young children are more open

“

Our local café changed everything up and started doing only takeaways and a ‘farmers market’ style shop. I’m now spending more there than ever.

Consumer, Over 40

Halfway through lockdown, we pivoted everything towards takeaway and we kept up with a lot of longstanding customers that way. We kept it going through reopening and we were glad of that when lockdown 2 rolled round. Will we still be doing it this time next year? I don’t know. If the demand is there, then I don’t see why not?

Trade, Dublin Restaurant

POST COVID PROJECTIONS

IT CAN BE CHALLENGING FOR CONSUMERS TO PREDICT THEIR FUTURE BEHAVIOUR.

Particularly in a situation as uncertain as the Covid-19 pandemic

However, the qualitative work supports the view that

New behaviours with regards to eating out/dining in have been adopted since March 2020

Some of these behaviours offer obvious benefits to the consumer so there is a good chance that at least some of them will stick in the longer term

I do think some things have changed for ever, yes. Some very good ideas came out of the crisis, that we never would have experimented with before. I'm thinking of the meal kits in particular, but I'm sure there are a lot of others.

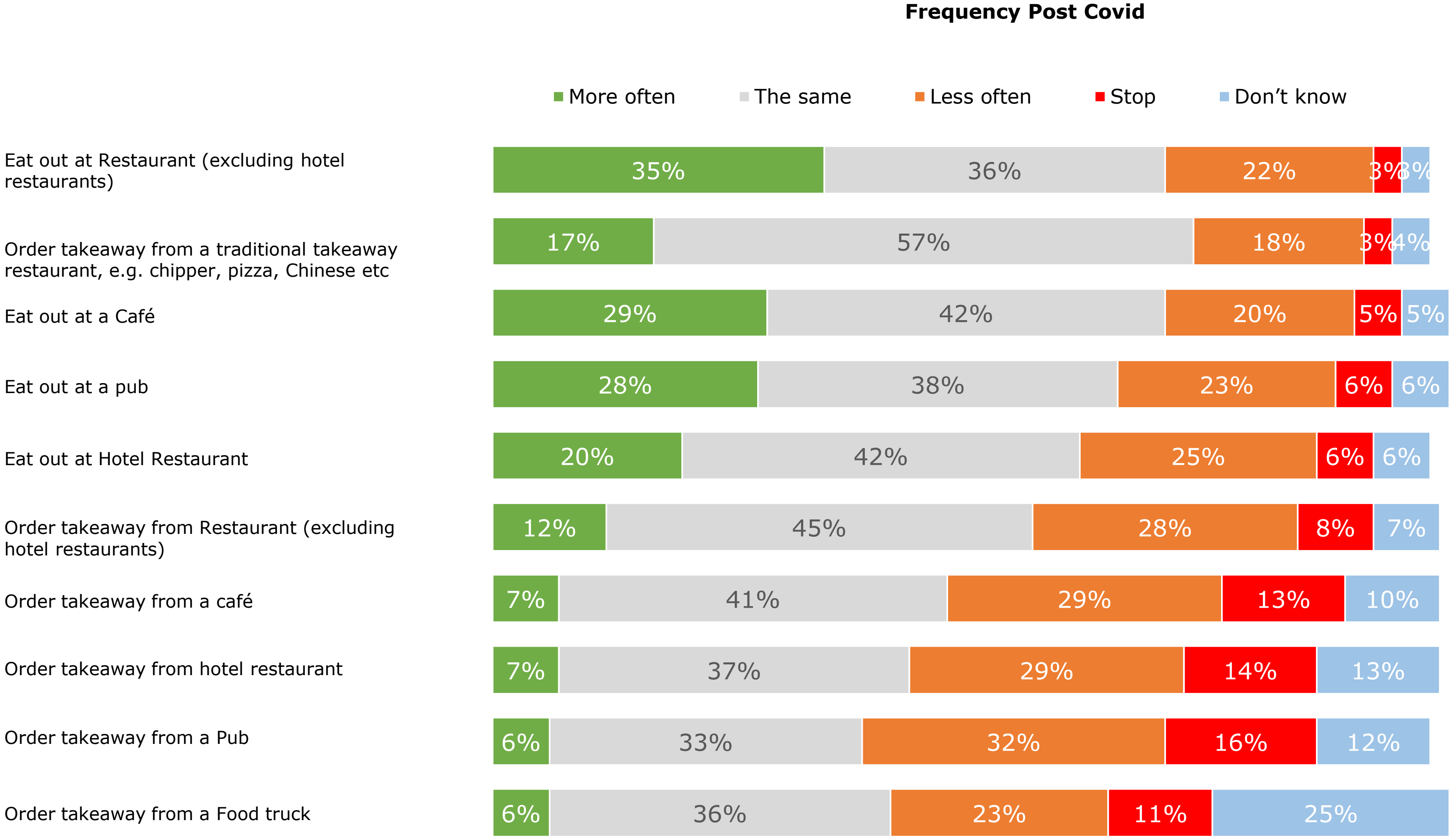
Trade, Dublin Restaurant

WE NEED TO CLARIFY WHAT WE MEAN BY 'THE FUTURE'

Consumers are thinking in terms of shorter/longer terms.

SHORT TO MEDIUM TERM	LONGER TERM
Some degree of restrictions remain in place.	When we have vaccine rollout and things close to 'normal'
Consumers in a better position to foresee what behaviours will carry on.	Consumers less able to predict what behaviours will stick. There are a lot of 'known unknowns' However we can still unearth insight around this.

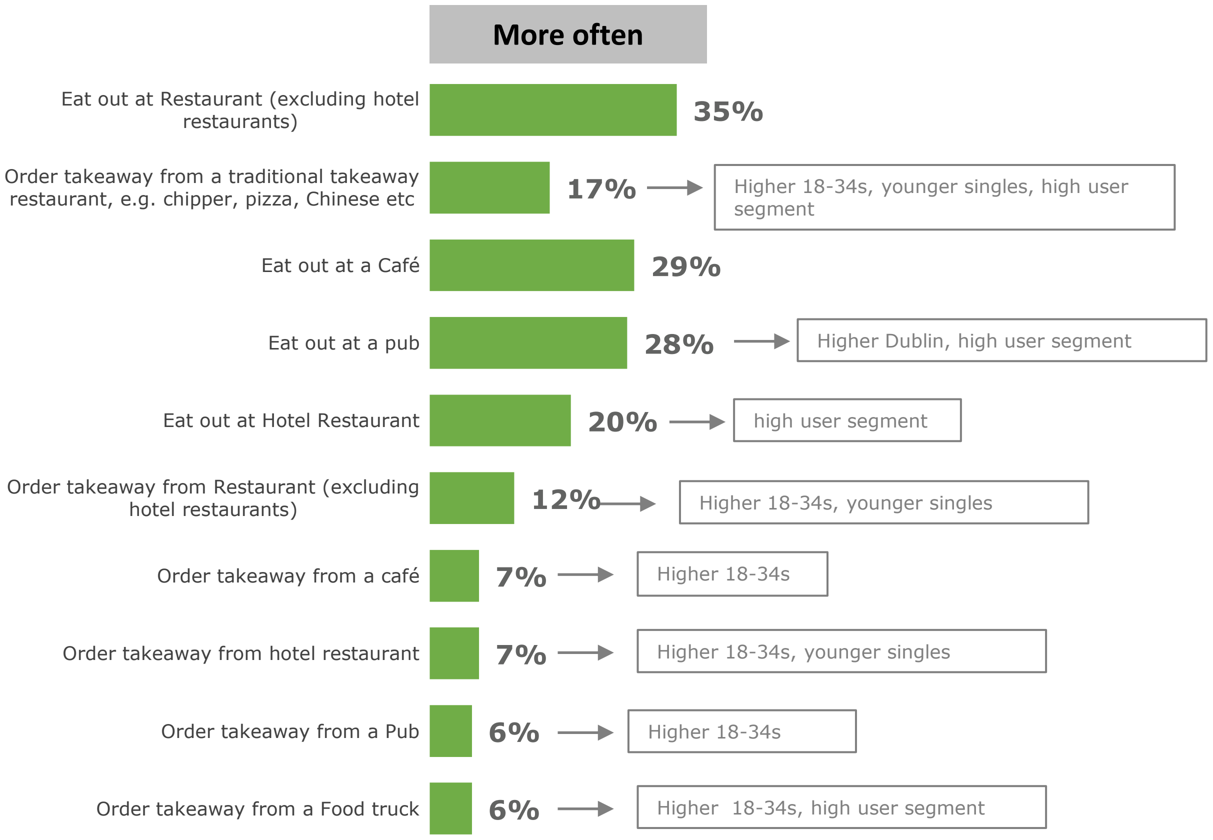
Post Covid - consumers on balance project a return to a version of 'normal': less usage of takeaways and a return to eating out



Base: All Irish adults who ate out or ordered in during 2019 n- 1032

Question text: QQ4b And compared to how frequently you have been doing this since the Covid-19 pandemic i.e. since March 2020, do you think you will be doing this more often, less often, the same or stop doing altogether after Covid-19?

Post Covid - 'More often' usage projections typically peak among the young & 'high' users; older age group most likely to 'Stop' takeaways.

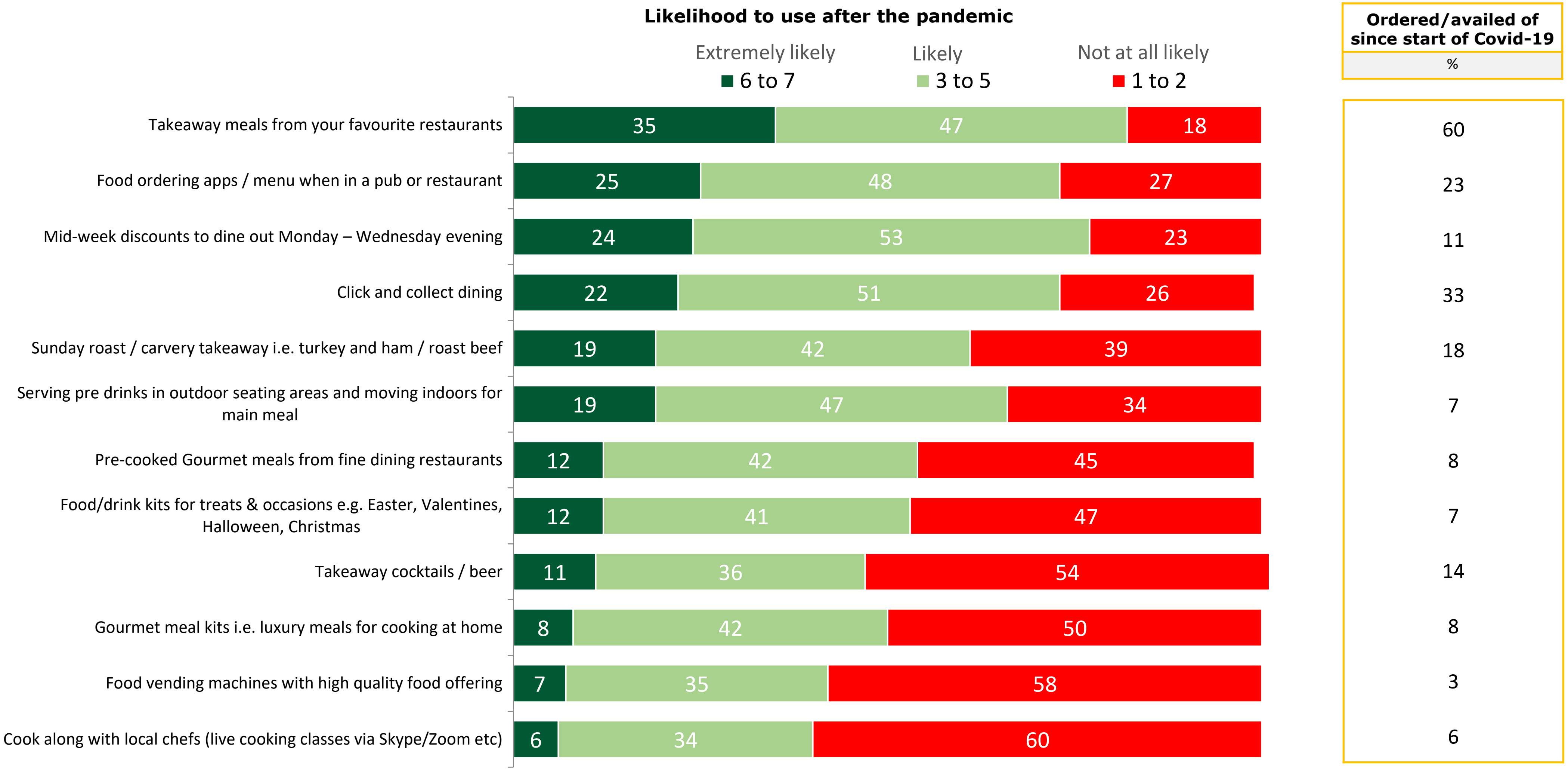


*User segments refer to pre Covid usage

Base: All Irish adults who ate out or ordered in during 2019 n- 1032

Question text: QQ4b And compared to how frequently you have been doing this since the Covid-19 pandemic i.e. since March 2020, do you think you will be doing this more often, less often, the same or stop doing altogether after Covid-19?

Post Covid - consumers show considerable openness to Covid driven service innovations – peaking for takeaway service from favourite restaurants



Base: All Irish adults who ate out or ordered in during 2019 n- 1032
Question text Q11b And on a scale of 1 to 7 how likely will you be to use each of the following post Covid-19 and we have returned to a more normal way of life? It does not matter if you have used any of these services, we just want to capture how likely you are to use them in the future.

Post Covid - continued takeaway service from favourite restaurants peaks across all user groups; mid-week discounts, food ordering apps, click & collect, Sunday roasts & pre drinks outdoors also make the top 6 across all segments.

Top 6 per user segment

% extremely likely (6-7)

Low user

- **Takeaway meals from your favourite restaurants** (29%)
- **Mid-week discounts** to dine out Monday – Wednesday evening (22%)
- **Food ordering apps** / menu when in a pub or restaurant (21%)
- **Click and collect** dining (19%)
- **Sunday roast** / carvery takeaway i.e. turkey and ham / roast beef (15%)
- Serving **pre drinks in outdoor** seating areas and moving indoors for main meal (15%)

Med user

- **Takeaway meals from your favourite restaurants** (39%)
- **Food ordering apps** / menu when in a pub or restaurant (28%)
- **Mid-week discounts** to dine out Monday – Wednesday evening (27%)
- Serving **pre drinks in outdoor** seating areas and moving indoors for main meal (25%)
- **Sunday roast** / carvery takeaway i.e. turkey and ham / roast beef (22%)
- **Click and collect** dining (22%)

High user

- **Takeaway meals from your favourite restaurants** (51%)
- **Food ordering apps** / menu when in a pub or restaurant (39%)
- **Click and collect** dining (35%)
- **Mid-week discounts** to dine out Monday – Wednesday evening (31%)
- **Sunday roast** / carvery takeaway i.e. turkey and ham / roast beef (27%)
- Serving **pre drinks in outdoor** seating areas and moving indoors for main meal (26%)

OUTSIDE DINING

Almost half of consumers have eaten outside since March: evaluation is positive (but not overwhelmingly so).

Incidence of having eaten outside since the Covid Pandemic

Satisfaction with eating outside since the Covid Pandemic
(All who ate outside N-488)

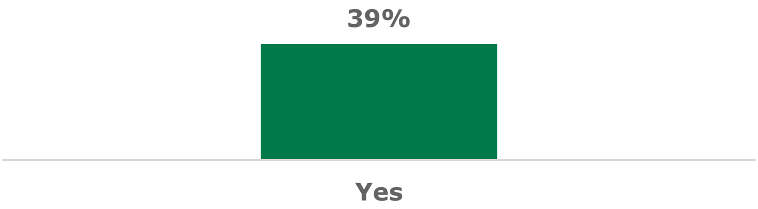
Those who over-index on eating outside:
18-34s
ABC1,
High users

*User segments refer to pre Covid usage

Base: All Irish adults who ate out or ordered in during 2019 n- 1032
Question text: Q7a Since the Covid-19 pandemic hit Ireland during March 2020, have you eaten outside at any pub, restaurant or café etc?
Q7b And taking all aspects into consideration, from comfort to cost, how satisfied were you generally with the eating outside experience? Please use a scale of 1 to 7, where 1 is extremely dissatisfied and 7 is extremely satisfied,

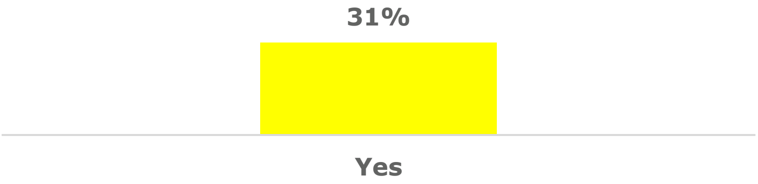
Outside Dining during Covid - outside diners are slightly more comfortable eating outside than inside (key trade off being safety vs Irish weather)

Any more comfortable eating outside

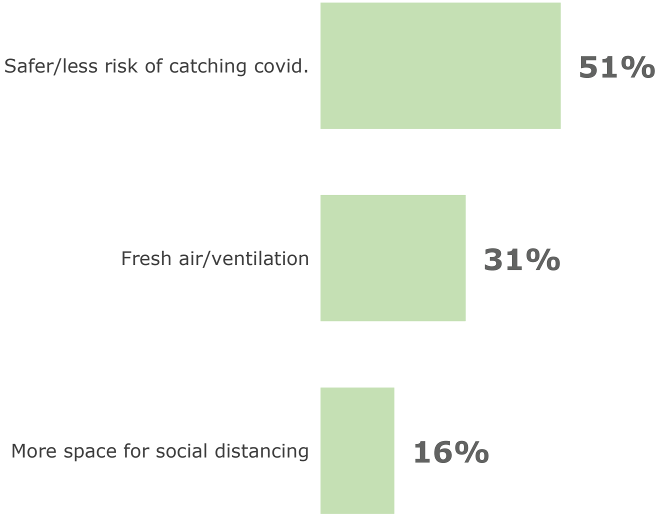


V's

Any more comfortable eating inside

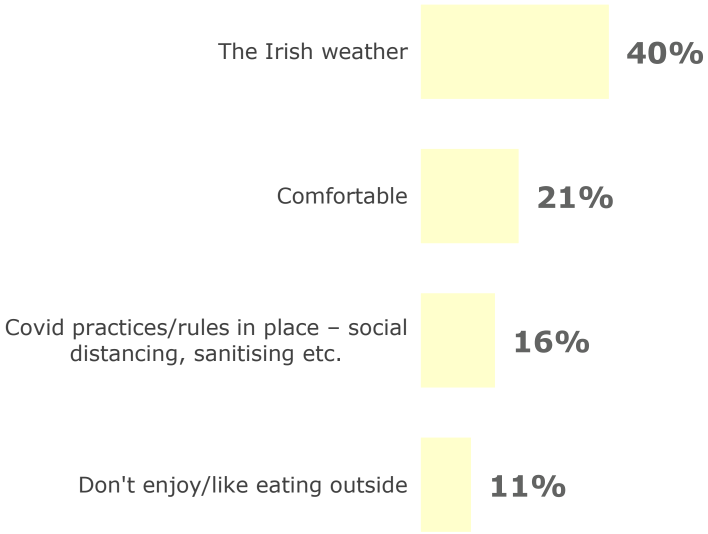


Rational for being more comfortable eating outside (n-372)



*All others less than 10%

Rational for being more comfortable eating inside (n-268)



*All others less than 10%

Base: All who ate outside since Covid-19 n- 488
Question text: Q8a And during Covid-19 are you generally more comfortable eating outside or inside?
Q.8b Why do you say that?

EATING OUTSIDE is relatively easy to embrace in the summer

The question is, how feasible is it in the colder months?

Different views between the trade/consumers.

- Trade are fairly pessimistic of outdoor eating being adopted in the longer term
- Consumers more up for it, if it allows them to:
    - Continue eating in restaurants under level 3 restrictions
    - Continue eating in restaurants while feeling a bit safer (particularly older diners).

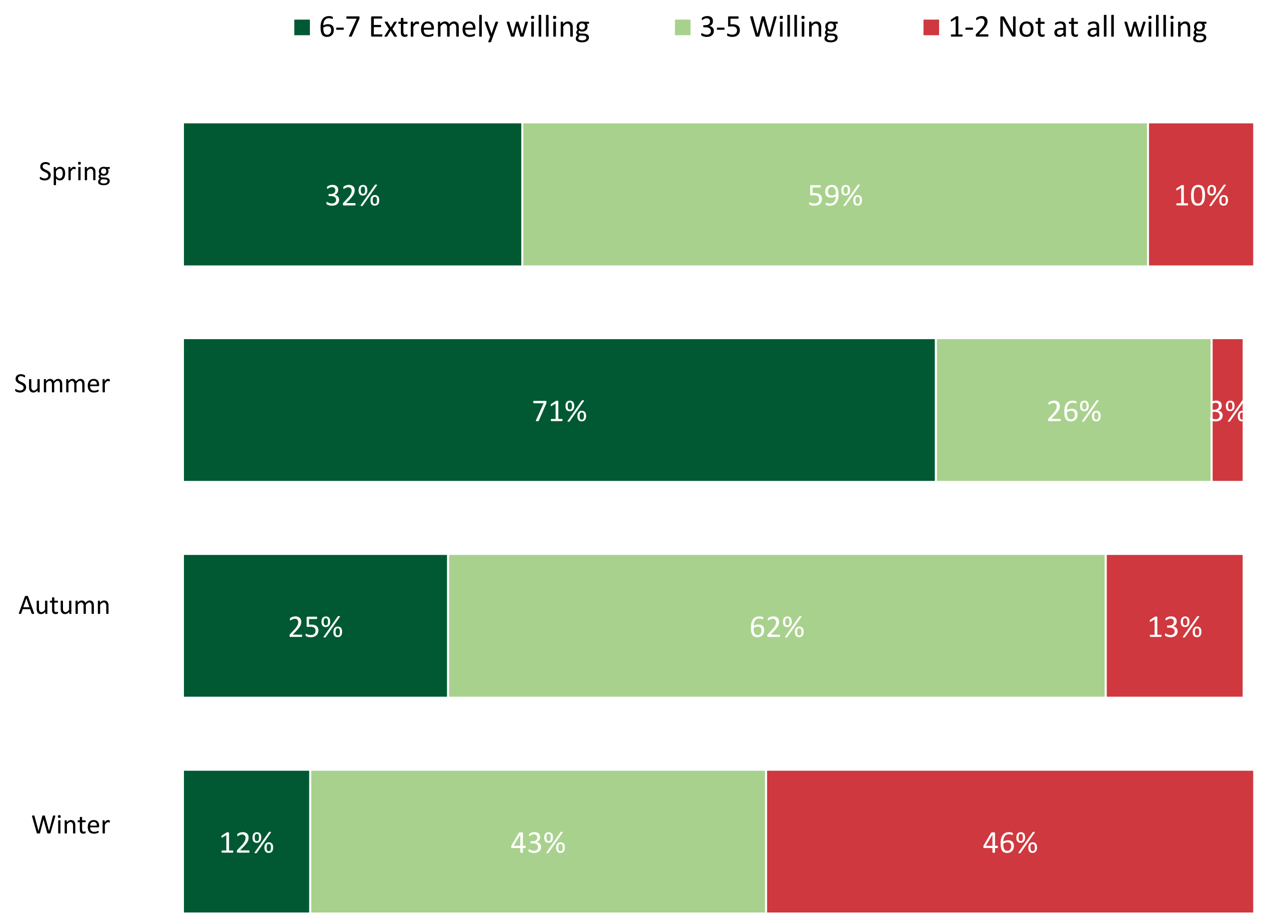
And of course, some establishments are better set up for outdoor dining and/or better at making it an enjoyable experience than others. Managing cold/rain/exposure in an effective way is obviously very important.

“

It’s not like you’d always choose to eat outside, but sometimes it’s lovely and perhaps we have to challenge our idea of what’s normal. If the choice is ‘eat outside or no restaurants open at all’, I think we’d be a lot more positive about the great outdoors.

Consumer, Over 40

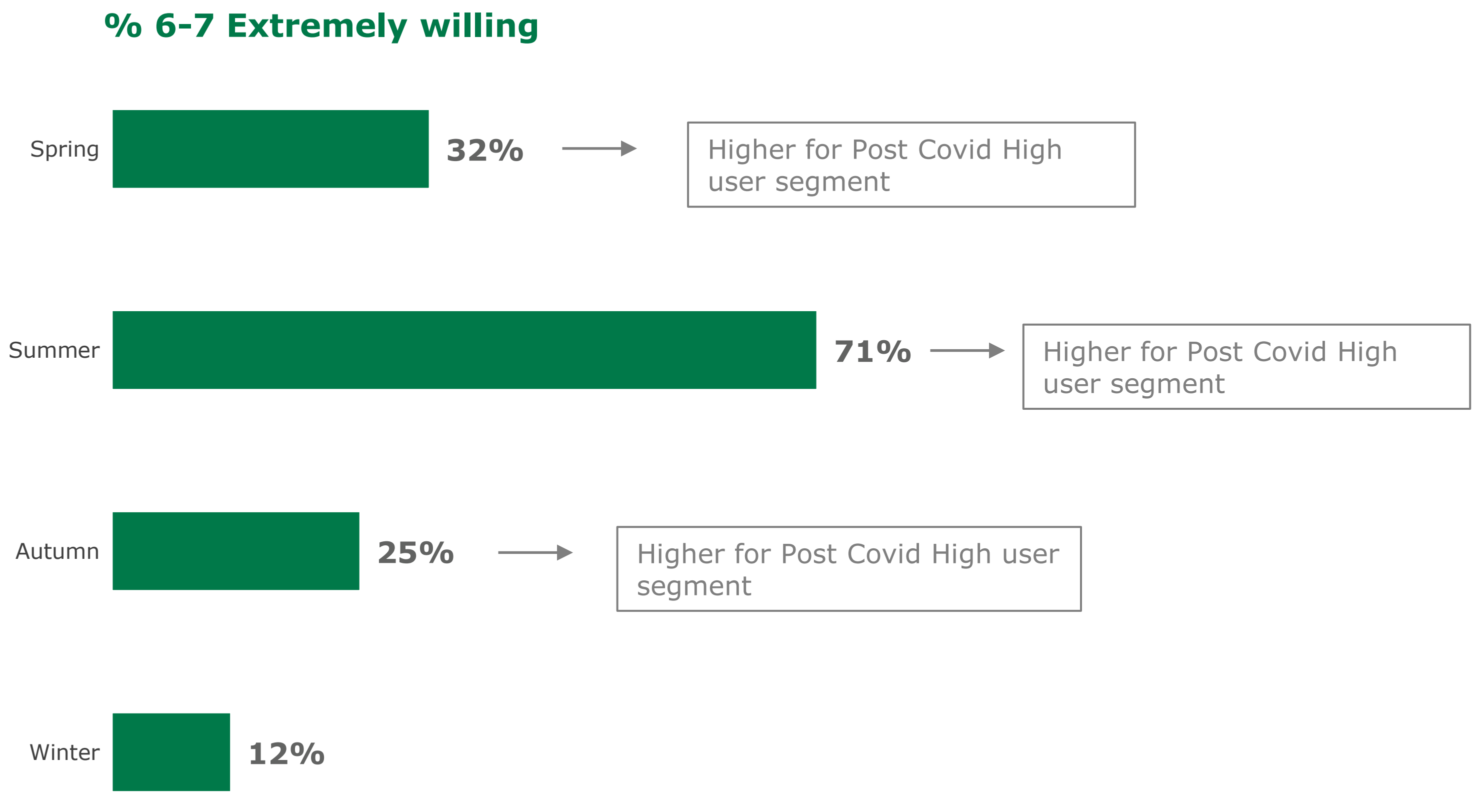
Willingness to eat outside does vary by season – 1 in 3 'Extremely Willing' during Spring



Base: All Irish adults who ate out or ordered in during 2019 n- 1032

Question text: Q10a And when thinking about eating outside, and assuming all heating, hygiene and comfort facilities are in place, please rate how willing you would be eat outdoors across the various seasons? Please use a scale of 1 to 7, where 1 is not at all willing and 7 is extremely willing.

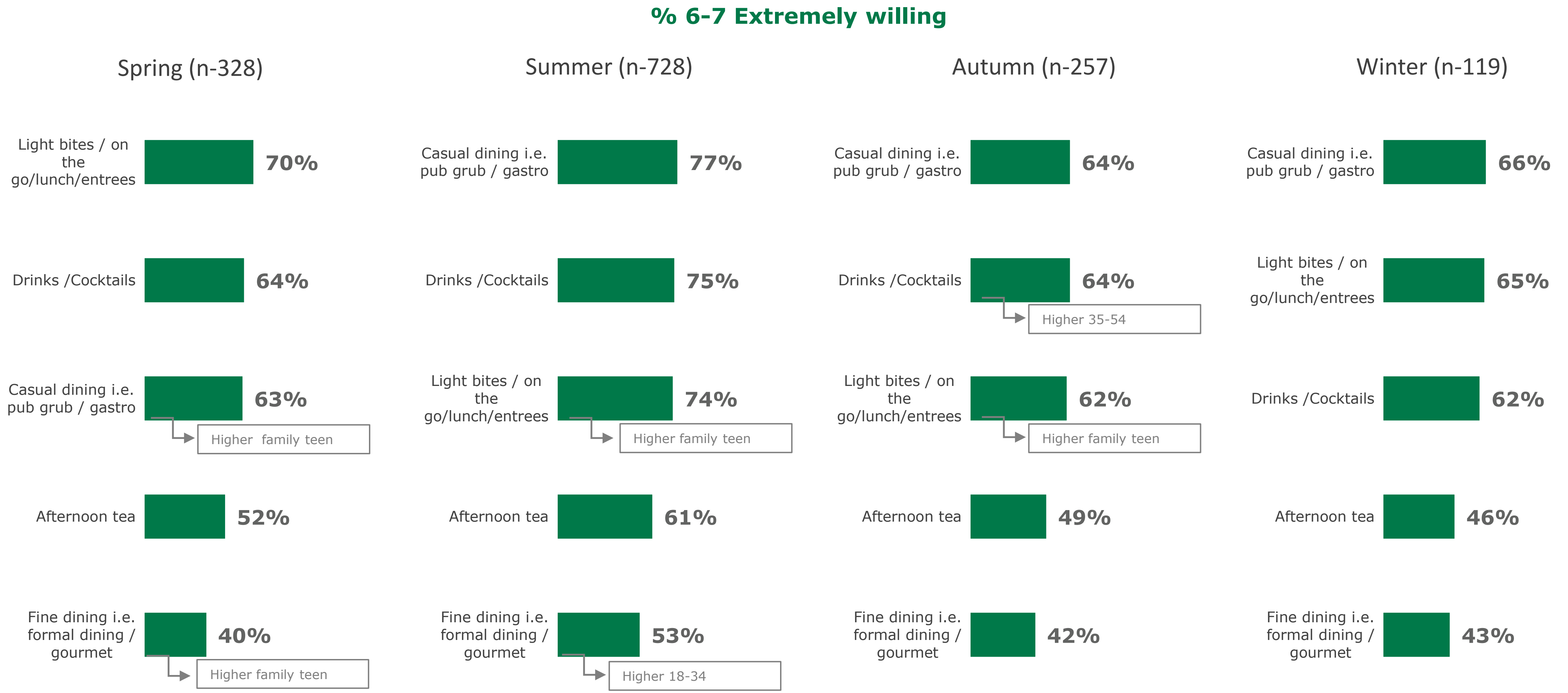
Outside Dining - willingness peaks among 'Post Covid High users' - may suggest outside dining most relevant for retaining customers as opposed to new customer recruitment.



Base: All Irish adults who ate out or ordered in during 2019 n- 1032

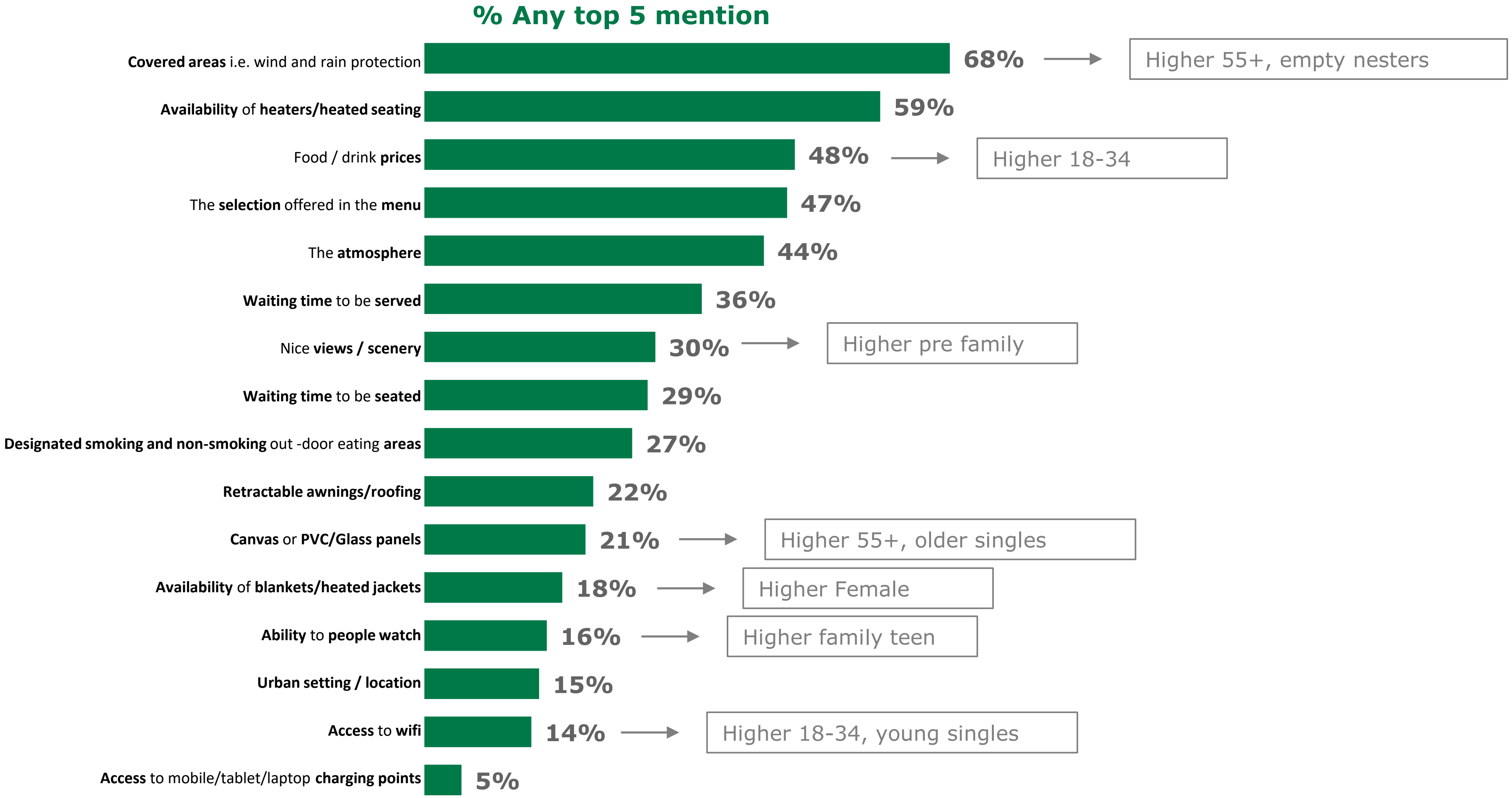
Question text: Q10a And when thinking about eating outside, and assuming all heating, hygiene and comfort facilities are in place, please rate how willing you would be eat outdoors across the various seasons? Please use a scale of 1 to 7, where 1 is not at all willing and 7 is extremely willing.

Outside Dining - there is a cross season preference for casual dining, light bites & drinks / cocktails



Base: All Irish adults open to eating outside during the various seasons
Question text: Q.10b Please rate how willing you would be to experience each of these outdoors across the various seasons?

Outside Dining - protections against Irish weather are the most important consumer criteria



Base: All Irish adults who ate outside since Covid-19 n- 488

Question text: Q.9 And now how important are each of the following aspects to you personally when eating outside? Again click on the most important one to you at the moment, then the next and so on….

Outside Dining - Key tactic for avoiding rejection is keeping customers warm

Q.9 And now how important are each of the following aspects to you personally when eating outside? ANY TOP 5

Base : 488 Filter: Q7a yes Weights: No weighting	Total	Q.7b How satisfied were you generally with the eating outside experience?		
		Extremely dissatisfied 1/2	Satisfied 3 to 5	Extremely satisfied 6/7
UNWTD	488	48	269	171
	%	%	%	%
Availability of blankets/heated jackets	18	29	17	18
Availability of heaters/heated seating	59	71	58	57
Covered areas i.e. wind and rain protection	68	67	67	70
Nice views / scenery	30	27	29	32
Designated smoking and non-smoking out -door eating areas	27	23	26	32
Retractable awnings/roofing	22	13	24	20
Canvas or PVC/Glass panels	21	23	21	22
The atmosphere	44	50	41	49
The selection offered in the menu	47	33	46	51
Waiting time to be seated	29	38	31	23
Waiting time to be served	36	25	35	40
Food / drink prices	48	48	53	41
Ability to people watch	16	17	16	16
Access to wifi	14	17	15	12
Access to mobile/tablet/laptop charging points	5	-	6	4
Urban setting / location	15	21	16	12

Base: All Irish adults who ate outside since Covid-19 n- 488
Question text: Q.9 And now how important are each of the following aspects to you personally when eating outside? Again click on the most important one to you at the moment, then the next and so on….

Some key observations based on the stimulus we showed

We're a cool country, so need to be inspired by Scandinavia, not Spain.

What works for summer holidays in Spain doesn't necessarily translate well here.

Colder countries can inspire us a lot though.

“

We need to be realistic about Irish weather. Most of us are basing our ideas on eating outside in restaurants on Spain or Portugal or something. We all know that won’t work here.

Consumer, Under 40

Some key observations based on the stimulus we showed

Rain is top of mind as a problem, but wind is also difficult to deal with

Creating sheltered environment will be important.

Some key observations based on the stimulus we showed

The lines between indoor and outdoor spaces will become more blurred

Some examples are best described as indoor/outdoor hybrids (they have their own advantages).

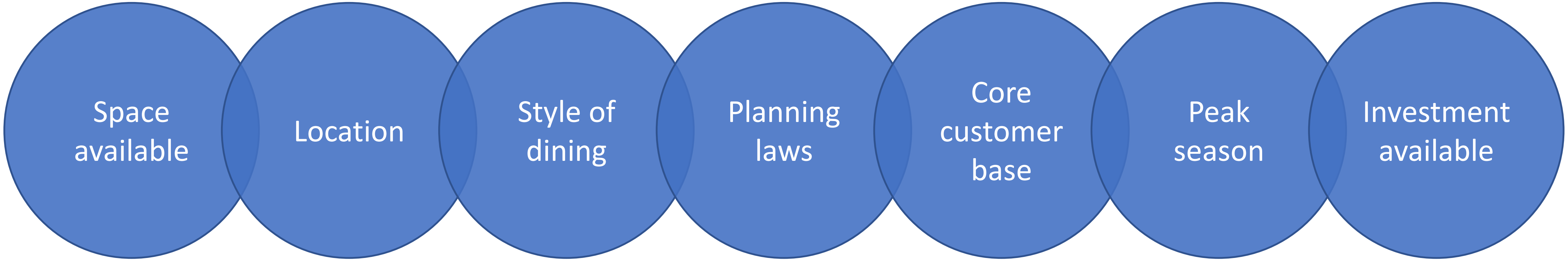
Some key observations based on the stimulus we showed

Different types of dining lend themselves to different modifications

The 'greenhouse' approach is rejected strongly for most dining-in options, but may have a role in a very high end establishment.

Café culture/pavement dining is great for very casual options, but less enticing for more formal/romantic/celebratory occasions

What works for individual establishments will depend on a wide range of factors



Establishments would love some tailored guidance on what would be the best outdoor solutions for them

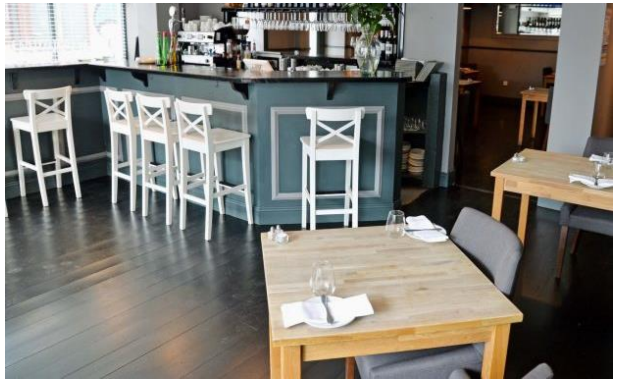
“

What everyone needs is some tailored guidance. Every place is different. We have a nice courtyard space but it’s a listed building, so planning permission issues.

Trade, Cork, Café/Restaurant

On a related point, going forward, diners will be happier with more spaced out tables

- Creating distance between tables has obviously become a priority because of Covid (along with sanitizing and so forth)
- Strong feeling among diners that they will feel more comfortable in more spacious settings, with more distance between tables, for a long time to come (safety trumps restaurant ‘buzz’)
- Particularly, older/more vulnerable consumers



Again, something that establishments may find challenging (creating more space, without losing tables). Every eating space is different from this point of view, again, tailored advice would be hugely welcomed.

“

My brother in law is an architect so he helped me make the most of the space that we have, within the guidelines. Its not something most of us have any expertise in, but he has the right ‘eye’ and his suggestions meant we only had to lose 4 tables. A miracle in my eyes.

Trade, Galway, Gastropub

Staycations this year involved a range of new behaviours

- More picnics
- More outdoor eating in restaurants/cafes
- More casual eating (from fish & chip vans/food trucks/pizza vans/ice cream vans)
- More self catering
- More ‘all inclusive’ (if staying in hotels)

It’s been eye opening to people how enjoyable some of these behaviours have been and how much money can be saved. Some of these shifts (like eating solely in the hotel you’re staying in) probably aren’t something people are interested in longer term. However, there’s a lot of enthusiasm for more casual eating going forward.

LOCATIONS

Eating in more local establishments is a very common new behaviour

There are a number of drivers behind this,

Desire to support local business.

Desire to avoid taxis/public transport.

Feeling a stronger connection with your neighbourhood during lockdown.

Fear that travelling around a lot is instrumental in spreading Covid.

Not spending time in towns/cities because we're WFH.

We can see the impact that long term WFH could have on this practice, for example. The economics of this are important too. Most people are prepared to pay a premium for local restaurants/cafes/gastropubs now, but if there is further economic hardship down the road, there will be less willingness

“

It’s local all the way now. I don’t have any desire any more to go further afield. I’m very invested in my lovely local restaurants staying open, so supporting them is a big priority

Consumer, Cork, Over 40

The future of city centre establishments looks much more insecure

Much less attractive to consumers in the short to medium term compared to local/tourist hot spots.

Didn't get the boost over the summer that tourist establishments got.

Their future is very dependent on workers returning to office spaces and a reignition of business socialising (and also the future of retail).

Space is often more of a premium making it difficult to create space and distance.

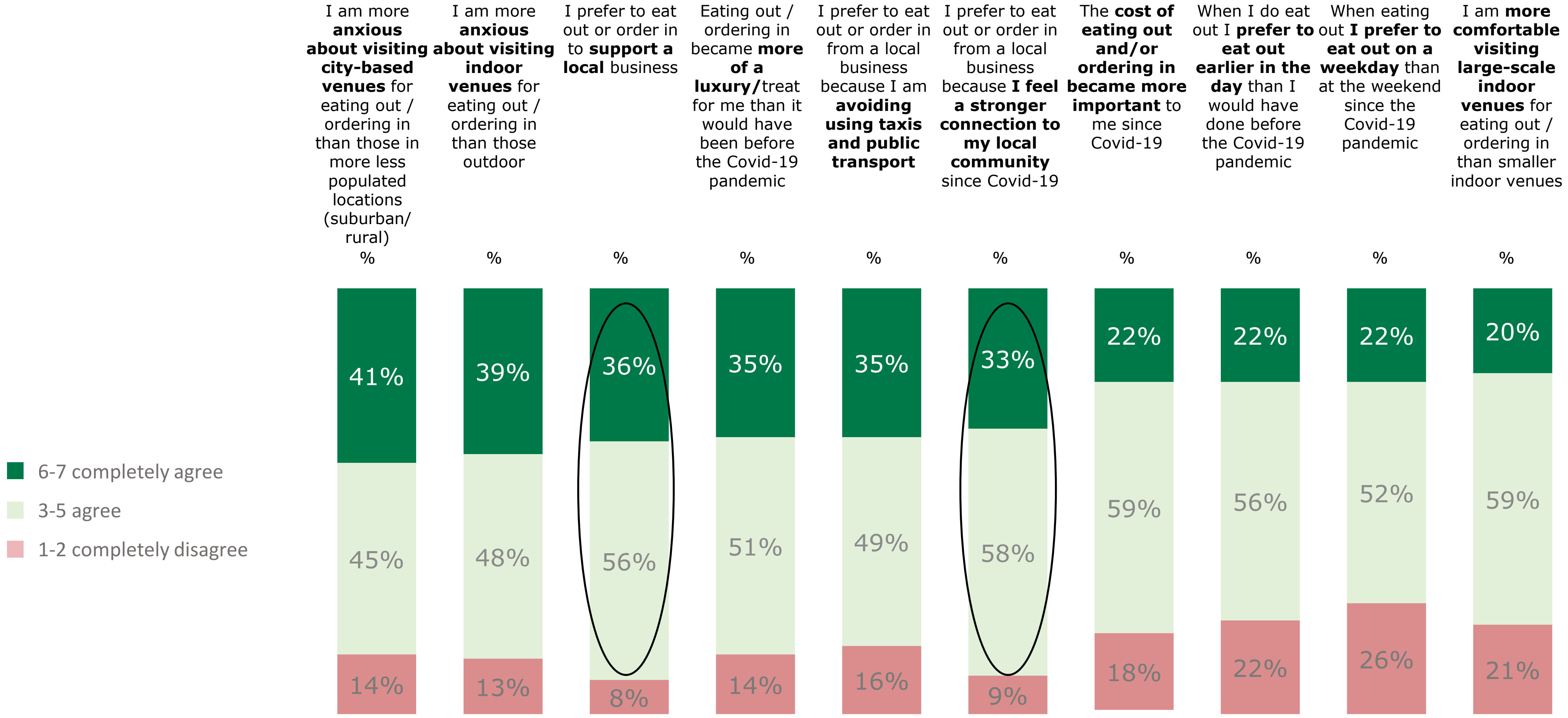
However, more positivity around the outdoor 'café culture' being created around Princes Street/off Grafton Street but this is most suitable for very casual, daytime/summer dining

"

We're a city centre cafe/restaurant attached to a tourist attraction. I feel like we've been totally forgotten in all this. We rely on the tourist crowd, the business lunch meeting, the office workers treating themselves. Its hard to say when any of that will come back, everything I read says people will be working from home forever.

Trade, Dublin, Café/restaurant

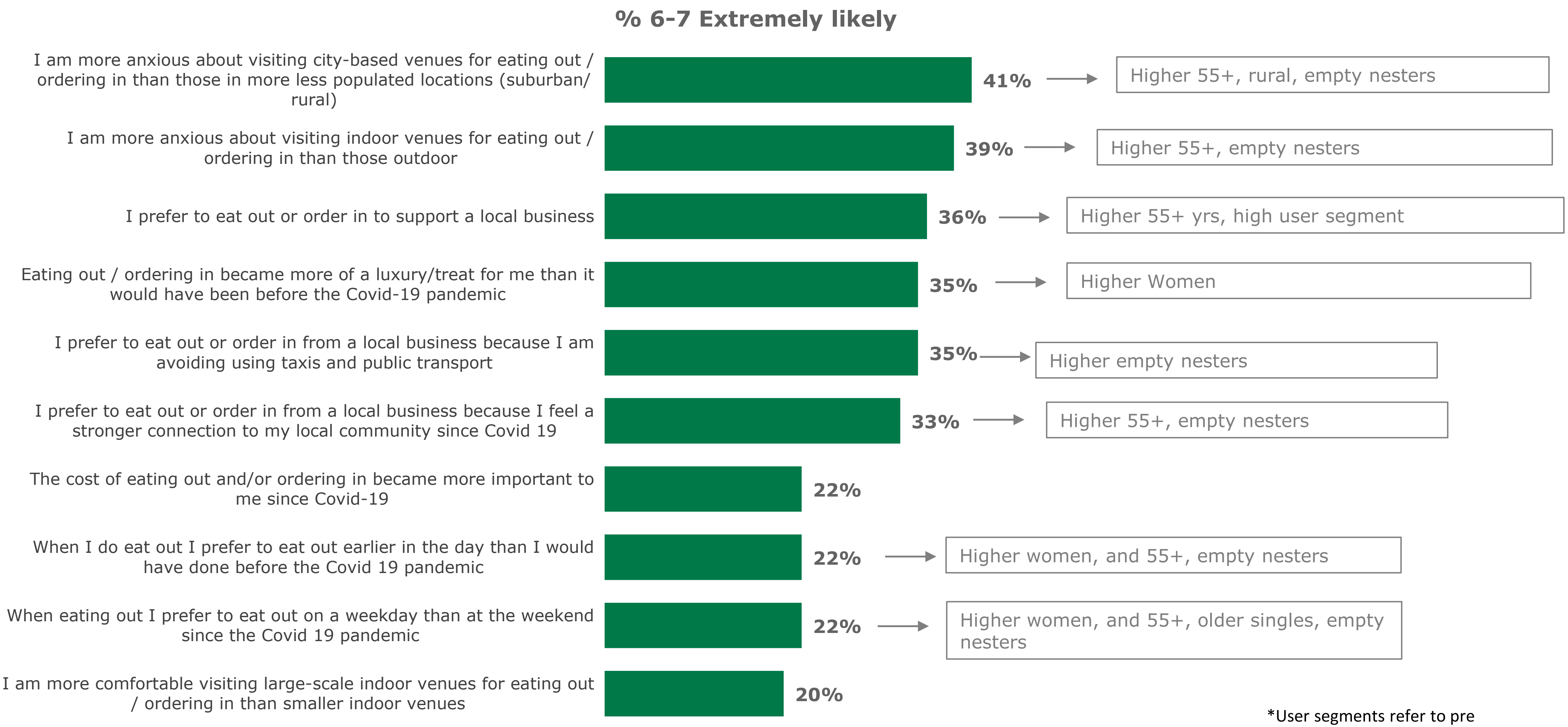
Since Covid - Consumers are understandably more anxious about city centre and indoor venues; support for local is a top tier consideration.



Base: All Irish adults who ate out or ordered in during 2019 n- 1032

Q.5 Now thinking about since the Covid-19 pandemic started in Ireland during March 2020, please rate your level of agreement with each of the following? Please use a scale of 1 to 7, where 1 is completely disagree and 7 is completely agree.

Both anxiety & local support peak amongst the older age group



*User segments refer to pre Covid usage

B&A RESEARCH & INSIGHT

Base: All Irish adults who ate out or ordered in during 2019 n- 1032

Q.5 Now thinking about since the Covid-19 pandemic started in Ireland during March 2020, please rate your level of agreement with each of the following? Please use a scale of 1 to 7, where 1 is completely disagree and 7 is completely agree.

TIMINGS

Eating at different times of the day may be here to stay

- When restrictions were lifted, many were keen to get back to restaurants/cafes/gastropubs.
- Due to limitations on numbers/desire to avoid at busy times, there were shifts in the timeslots people were eating out during.

Choosing to go for lunch rather than dinner.

Eating dinner earlier (as early as 5pm) rather than the classic 7/8pm slot.

- Consumers do see this continuing in the shorter term at least, particularly if outdoor dining continues and it gets dark/cold more quickly
- Also, WFH gives people more flexibility in their day
- Again, this looks like it may continue longer term with older/more vulnerable consumers but not necessarily healthy young people

“When they re-opened, we started going for earlier dinners. To avoid the busy periods mostly. We wouldn’t normally have eaten at 5/6pm but it has its advantages. Still light when going home, you had a bit of an evening at home, we had our friends back to the garden for a drink. So I think that will be something we do more of.

Consumer, Cork, Over 40

We would like to return to more spontaneous dining eventually

- During opening up periods, consumer got used to having to book 90 minute slots
- This hasn't improved the eating out experience for most
  - Not something that they want to continue long term.
- However, it has given rise to more complex restaurant 'journeys' (not widely reported, but referenced by some) which could be something that has legs in the future.

Meal out	Drinks somewhere else
Main course in one restaurant	Dessert in another establishment
Main course in one restaurant	Take away cocktails for home

More complex restaurant 'journeys' may be a longer-term trend, particularly if the 90 minute slots continue in the longer term

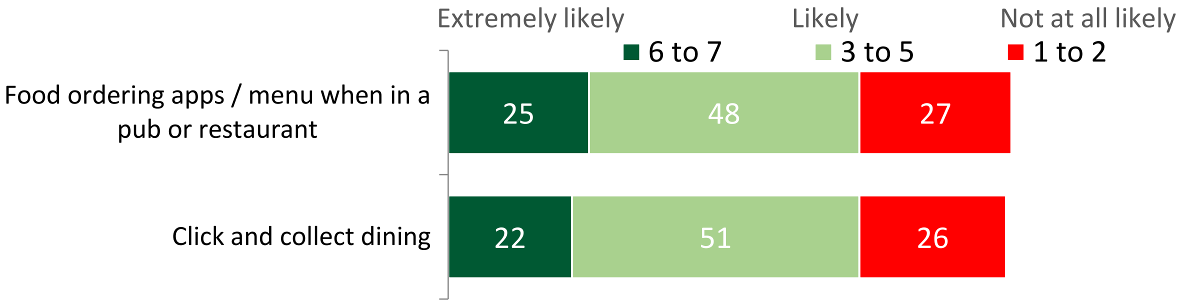
TECHNOLOGY

Utilising technology

Good use of technology has helped restaurants cope with the Covid crisis.

- Consumers have made more use of tech across all stages of the experience.
    - Ordering (from home)
    - Delivering
    - ‘Checking in’ to a restaurant
    - Ordering (in a restaurant).
- It has been appreciated as delivering a touch free/more efficient service.

Likelihood to use after the pandemic



Consumers expect some aspects to have longevity however the extent of this will be a trade off between seeking greater efficiencies (which tech delivers) and providing a more human/personal experience.

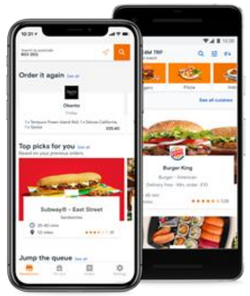
After months of lockdown we are sick of screens and seeking interaction with real humans.

“

I think they have to be careful with this one. We’ve been so starved of human contact that when things get back to normality, that will be a very important part of the experience. Technology is a double-edged sword.

Consumer, Dublin, Under 40

The extent to which technology can add will depend on the experience sought



Takeaway/Delivery options

Openness to whole process being technologically driven.

Casual dining

Interest in ordering via app or utilising QR codes, potentially even before reaching the establishment, but some level of personal service expected when inside.

Ideally this delivers an actual benefit beyond ‘safety’ (i.e. more efficient service).

High end dining

Resistance to this kind of experience becoming technologically driven. Personal service will still be key, start to finish. Some creative thinking may be required around menus (little interest in these being digital).

KEY SUMMARY

Insights

1. Basic pattern of pre & post Covid motivations is largely consistent - taste is king, with primacy also given to relaxing in a social setting; post Covid there is a stronger emphasis on different experience (break from enforced routine).

2. Since Covid - Consumers are understandably more anxious about eating out in city centres and indoor venues, while the desire to support local is prominent.

3. Almost half of consumers have eaten outside since March: evaluation is fairly positive. Future willingness varies by season with keeping customers warm & dry the key consideration (desire for warmth likely has broader meaning that temperature alone – type of food, drinks and décor).

4. Post Covid - consumers on balance project a return to 'normal': less usage of takeaways and a return to eating out; future takeaway use likely dominated by 'traditional' providers - but 1 in 4 do project using restaurant takeaways (43% used during 'Reopening')

5. Post Covid - consumers also show considerable openness to continued usage of Covid driven service innovations – including mid-week discounts, food ordering apps, click & collect, Sunday roasts & pre drinks outdoors.

Final recommendations

1.

Even as vaccines get rolled out and the situation becomes more manageable, Covid-related measures, like **outdoor eating** and **distancing** will be important to customers to help them feel more 'safe'

Establishments should be prepared to cater for this for the foreseeable.

2.

Many of the Covid-related innovations in this sector **have clear benefits** for the consumer and may be here to stay.

The sector has been very flexible and innovative thus far, and this spirit will continue to be vital as core business models may look very different again, this time next year.

3.

City centre establishments have had it tougher than most and a return of growth here might be further impacted by longer term WFH.

More support for this sub-sector would be appreciated by the trade.

4.

There was much enthusiasm this summer for **more casual dining out options**, during domestic holidays like fish and chips vans/food trucks/picnics.

There are opportunities to build on this as part of our summer campaigns next year.

5.

Technology has flourished within the sector as a result of Covid-related restrictions.

Long term, it is welcomed where it improves the eating out/dining in experience (greater efficiency for example).

However, it is important that we recognise where tech doesn't enhance – where human contact is a key part of the experience.

6.

No 'one size fits all' solution exists for the sector in managing post-Covid impact.

So much depends on space, clientele, location, ambience, investment potential to some degree, advice to establishment needs to be tailored.

THANK YOU