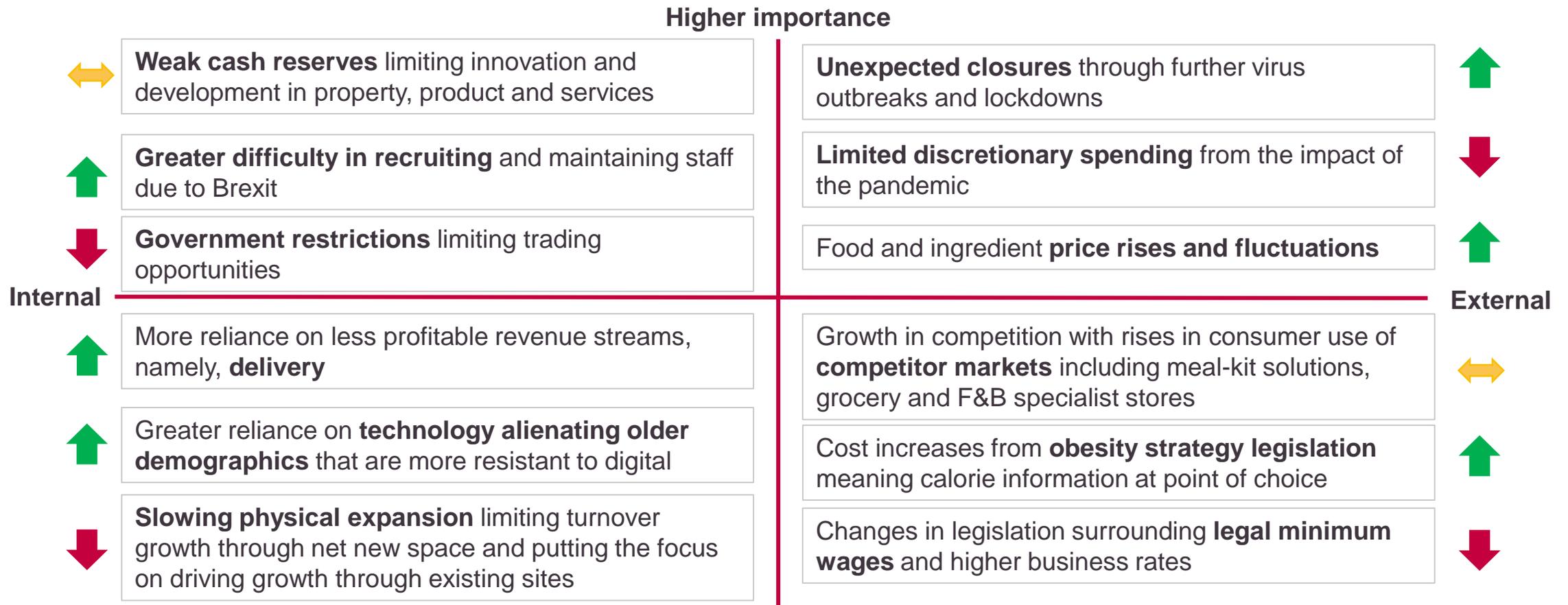


UK Eating Out Market Report 2021

June 2021

HOTELS, PUBS & RESTAURANTS GROWTH INHIBITORS, 21F-24F

Weak cash reserves for some operators will continue to be a growth inhibitor whilst the risk from further trade restrictions remains.



Source: Lumina Intelligence, June 2021

TECHNOLOGY IS KEY TO WINNING 18-34S BACK ON-PREMISE

Risk-adverse older consumers place higher importance on social distancing measures being enforced, whilst younger consumers are more likely to be attracted back to venues by special events and remote ordering via technology.

What can restaurants, coffee / sandwich shops, pubs, and bars do to get you to visit again in the next 12 months?

Enforce social distancing rules	44%
Offer good promotions	41%
Increase cleanliness	40%
Offer outdoor seating	37%
Offer remote ordering or payment via a tablet	22%
Special events	10%

18-24's are **+72%** more likely to visit for special events and **+26%** more likely if remote ordering via tablet is available.

25-34's are **+49%** more likely to visit special events and **+39%** more likely to visit if remote ordering via tablet is available.



Brewhouse and Kitchen launched a new mobile app ordering service in July last year.

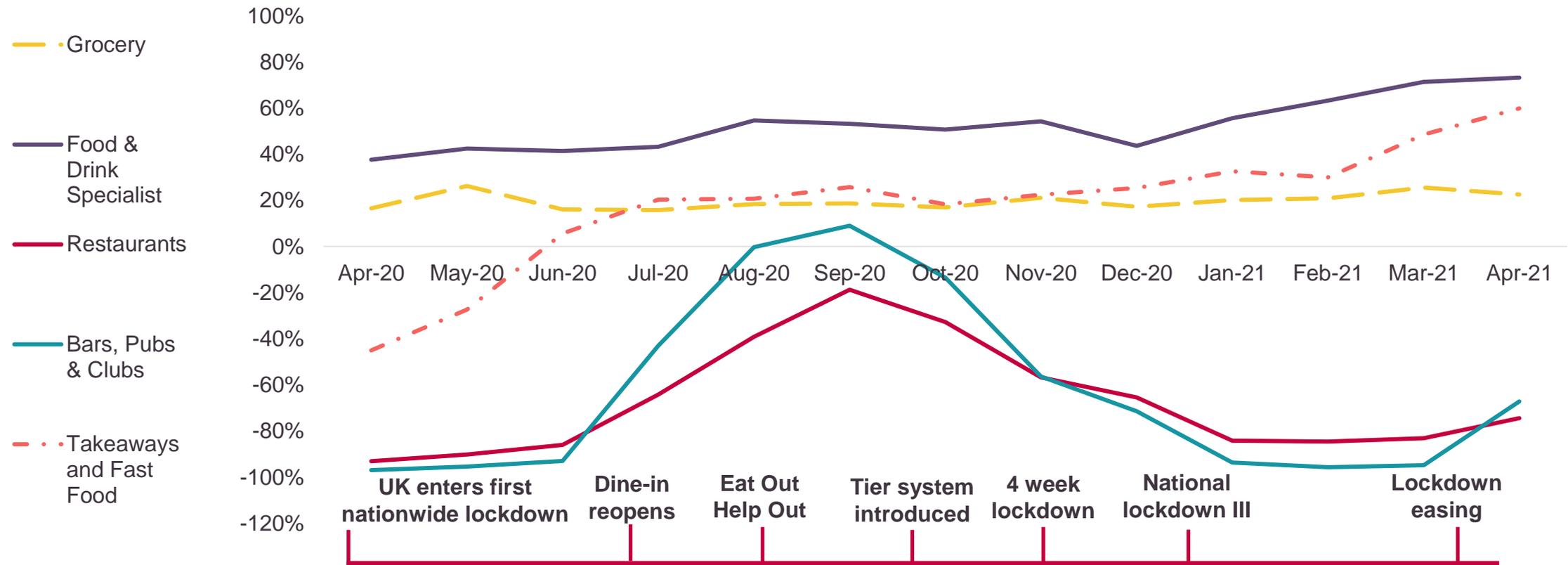


The Artichoke in Croxley Green clearly highlights on the front door steps taken to ensure social distancing is enforced

Apps which allow ordering can be used to facilitate social distancing and encourage loyalty and repeated visits through integrated loyalty schemes. Maintaining alfresco dining spaces as summer approaches will be one way to ease consumer concerns around social distancing.

SPECIALIST F&B AND TAKEAWAY SHARE GROWS DURING LOCKDOWN

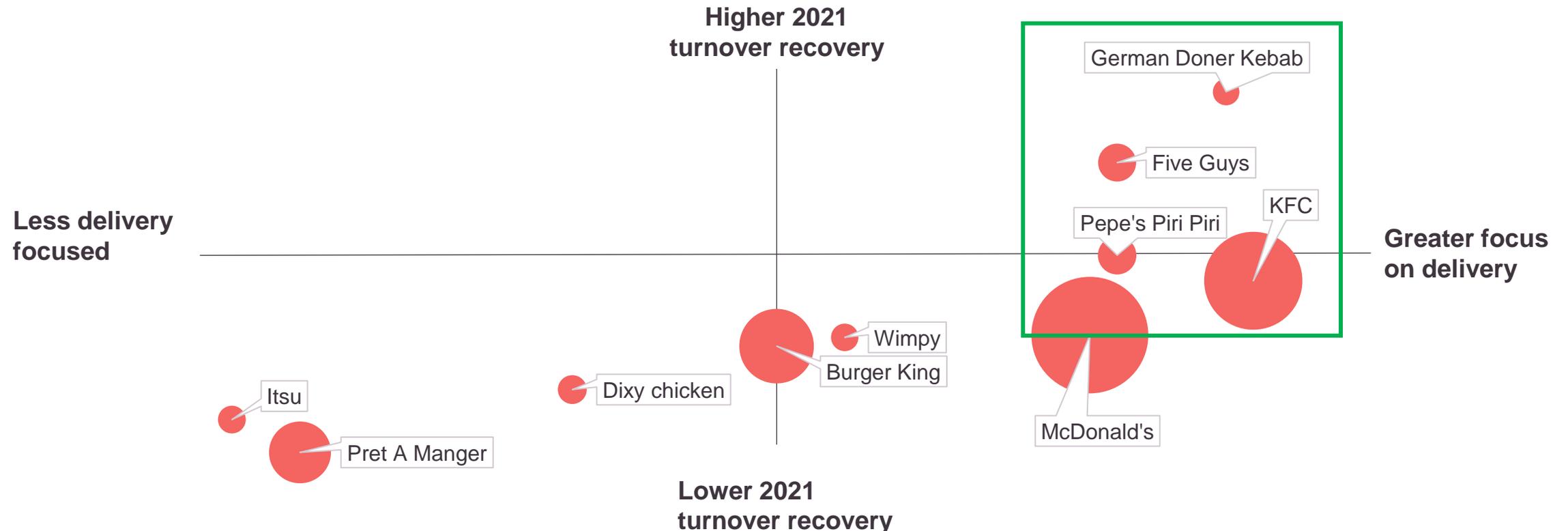
Food and drink specialist stores including butchers, green grocers and alcohol stores have seen continued growth throughout the pandemic, as local shopping has remained a strong consumer need.. Restaurants, pubs and bars across England were able to reopen for outdoor dining from 12 April, driving a slight uplift for pubs/bars/clubs and restaurants which should continue with the reopening of indoor hospitality from May 17.



Source: Barclaycard Consumer Spending Reports, April 2020-April 2021, 2020 and 2021 figures show percentage change versus the same month in 2019

FAST FOOD OUTPERFORMERS MORE FOCUSSED ON DELIVERY

Fast food brands expected to recover past 2019 turnover in 2021 include German Doner Kebab, Five Guys, Pepe's Piri Piri and KFC. Alongside continued physical expansion these brands are more skewed towards delivery and have been able to maintain meaningful revenue streams throughout lockdown periods of the pandemic.



Note: Bubble size refers to operator size by outlets at Dec-21F

Source: Lumina Intelligence, June 2021

FULL REPORT TABLE OF CONTENTS

Executive summary

Market Insight

UK eating out market value 2020

The impact of coronavirus on UK food & drink channel share

Consumer confidence data

2021 UK eating out market forecasts scenarios

UK eating Out market landscape, 2021F

Retail, travel & leisure landscape, 2021F

Hotels, pubs & restaurants landscape, 2021F

Contract catering landscape, 2021F

Channel recovery in 2021

UK eating out market outlet count in 2021

Retail, travel & leisure leading outlet growth

Retail, travel & leisure growth drivers

Retail, travel & leisure growth Inhibitors

Hotels, pubs & restaurants growth drivers

Hotels, pubs & restaurants growth Inhibitors

TABLE OF CONTENTS

Competitive landscape

The top 10 eating out companies in the UK by turnover

The Top 10 eating out companies turnover share of the total market in 2021

The Top 10 eating out companies outlet share of the total market in 2021

Top 10 branded restaurant operators by outlets

Recovery potential for top 10 branded restaurant operators in 2021

Top 10 fast food operators by outlets

Recovery potential for top 10 fast food operators in 2021

Top 10 pub and bar restaurant operators by outlets

Recovery potential for top 10 pub and bar restaurant operators in 2021

Top 10 branded restaurant, pub/bar restaurant and fast food brands by outlet growth, Dec-20-Dec-21F

Four trends driving branded restaurant growth

Leading hotel brands by outlets, Dec-19-Dec-21F

Top 10 coffee shop/café & dessert parlour brands at Dec-21F

Top 10 sandwich & bakery brands by outlets at Dec-21F

Top 10 coffee shop/café, dessert parlour, sandwich & bakery brands by outlet growth, Dec-20-Dec-21F

Top 10 convenience store fascias by outlets, Dec-19-Dec-21F

TABLE OF CONTENTS

Consumer Insight : Consumer Behaviour

Eating out market penetration

Average eating out frequency

Average spend per visit (total eating out market)

Eating out occasions by day part

Delivery and click & collect share of eating out occasions

Key consumer motivators for eating out

Channel share of eating out occasions

Operator share of eating out occasions

Most popular dishes chosen by consumers

Barriers to eating out

Average spend on-premise

Share of eating out occasions by outlet location (city centre, residential, high street etc.)

Reasons for eating out

Dietary profiles of eating out consumer



TABLE OF CONTENTS

Consumer Insight : Consumer Attitudes

- Top activities missed by consumers during lockdown
- The impact of the pandemic on social occasions and future intentions
- Consumer attitudes towards city centre visits
- Consumer intentions towards eating out post-coronavirus restrictions
- Barriers to visiting pubs
- Financial position of consumers as a result of the pandemic
- Key areas where consumers reduced spend during the pandemic
- Consumer attitudes towards restrictions easing
- Chain vs independent restaurants: consumers' future intentions
- The kind of occasions that consumers will eat or drink out less for in the next 12 months
- The importance of technology
- The role of promotions
- The strength of brands in soft drinks, alcohol and condiments categories



TABLE OF CONTENTS

Future outlook

Macroeconomic factors 2018-2024F

Total eating out market by turnover (m) and turnover growth, 2018-2024F

Total eating out market by outlets and outlet growth, 2018-2024F

2022F and 2024F turnover and CAGR by eating out channel

Eating out market turnover share by channel 2024F

Eating out market outlet share by channel 2024F

Top 10 eating out market sub-channels, by absolute value growth, 2022F-2024F

Retail, travel & leisure growth drivers, 2021F-2024F

Retail, travel & leisure growth inhibitors, 2021F-2024F

Hotels, pubs & restaurants growth drivers, 2021F-2024F

Hotels, pubs & restaurants growth inhibitors, 2021F-2024F

Future concepts: International brands seeking UK expansion

Future concepts: foodservice & retail partnerships

Future concepts: immersive experiences

Get in touch

For further information about this report please contact:

Holly.franklin@lumina-intelligence.com or

[Visit our website](#)

