

Attitudes towards Lunch Out-of-home - UK - June 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“Lunch out of home continues to be a bright spot in the eating out market. However, lunch operators have to work on their value proposition as more people show a pragmatic approach to spending. Getting good value is not all about paying a low price. Brands that provide a range of indulgent options that are still relatively healthy will be viewed as offering good value for money.”

– **Trish Caddy, Senior Foodservice Analyst**

This report looks at the following areas:

- The popularity of supermarket meal deals
- Healthy behaviours of non-meat eaters and Flexitarians
- Scope for promotions before payday

Greater availability of more hot food for takeaway, as well as affordable lunch deals across the board, have impacted on fast food outlets and pubs/bars, both of which lost lunch visitors in 2019.

While lunch is by far the most popular out-of-home meal occasion, the category has started to face intense competition from other mealtimes, notably brunch, which is the fastest-growing mealtime in terms of out-of-home participation.

Lunch operators have to work on their value proposition as more people show a pragmatic approach to spending. However, getting good value is not all about paying a low price. Brands that provide a range of indulgent options that are still relatively healthy will be viewed as offering good value for money.

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Attitudes towards Lunch Out-of-home - UK - June 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know
Products covered in this Report

Executive Summary

The market
Pret A Manger launches Five-Point Allergy Plan
Sustainability driving the food-to-go sector
Backlash after drinks brands shrink sizes in response to sugar tax
Companies and brands
Pret's takeover of EAT will boost vegetarianism
Greggs continues to scale up
Figure 1: Selected lunch foodservice brands, by number of outlets, 2012-19
Paul UK to drive loyalty with technology
Vending machines blur boundaries
Leon's veganism takes root
The consumer
Brunch eats into lunch participation
Figure 2: Change in overall visits, April 2018-April 2019
Established venues lost the most lunch visitors in 2019
Figure 3: Change in venues visited for lunch out of home, April 2018-April 2019
Leisure dining is as important as everyday convenience
Figure 4: Types of occasion, by days of the week usage, April 2019
Late week (Thu-Fri) lunch: focus on full-time workers
Figure 5: Days of the week usage, April 2019
Spicy lunches heat up interest of younger consumers
Figure 6: Lunch meal preferences, April 2019
Key consumer groups
Young and working professionals are "creatures of habit"
Figure 7: Behaviours related to eating lunch out of home, April 2019
Lunch options at fast food chains score poorly
Figure 8: Perceptions of different operators' lunch ranges, correspondence analysis, April 2019
What we think

Issues and Insights

The popularity of supermarket meal deals
The facts
The implications

BUY THIS
REPORT NOW

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
APAC +61 (0) 2 8284 8100 |
EMAIL: reports@mintel.com

Attitudes towards Lunch Out-of-home - UK - June 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Healthy behaviours of non-meat eaters and Flexitarians
The facts
The implications
Scope for promotions before payday
The facts
The implications

The Market – What You Need to Know

Pret A Manger launches Five-Point Allergy Plan
Sustainability driving the food-to-go sector
Backlash after drinks brands shrink sizes in response to sugar tax

Market Drivers

Clear allergen information
Food-to-go sustainability
Fish
Packaging
Shrinking sizes in response to sugar tax

Companies and Brands – What You Need to Know

Greggs continues to scale up
Rise of supermarket-style meal deals
Technology drives loyalty
Vending machines blur the boundaries between supermarkets and foodservice
Pret's takeover of EAT will boost vegetarianism
Leon's veganism takes root

Key Players and Market Share

Key players continue to scale up
Greggs
Pret's takeover of EAT
Figure 9: Selected lunch foodservice brands, by number of outlets, 2012-19
Pubs need to do more to strengthen their lunch position
Figure 10: Types of venues, by number of sites, 2019
Growth markets
Supermarket tie-ups
Non-food retail tie-ups
Travel hubs
Spin-off restaurant brands

Launch Activity and Innovation

Rise of meal deals
Supermarket style

BUY THIS
REPORT NOW

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
APAC +61 (0) 2 8284 8100 |
EMAIL: reports@mintel.com

Attitudes towards Lunch Out-of-home - UK - June 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 11: Examples of meal deal flyers, by a restaurant (left) and sandwich/bakery shop (right)

- Limited edition
- Role of technology
- To drive loyalty
- Click-and-collect
- Vending machines
- Veganism takes root
- Leon's sales get a vegan boost
- Greggs vegan sausage rollout
- Subway trials vegan sandwich and salad

The Consumer – What You Need to Know

- Brunch eats into lunch participation
- Established venues lost the most lunch visitors in 2019
- Late week (Thu-Fri) lunch: focus on full-time workers
- Spicy lunches heat up interest of younger consumers
- Young and working professionals are “creatures of habit”
- Lunch options at fast food chains score poorly

Out-of-home Eating Occasions

- Brunch starts to eat in to the lunch out-of-home sector
Figure 12: Change in overall visits, April 2018-April 2019
- Leisure dining is almost as important as everyday convenience
Figure 13: Change in participation in eating out, by type of occasion, April 2018-April 2019
- Significant decline in everyday lunch...
Figure 14: Change in everyday participation (eg for work/college, to refuel when shopping), by meal occasions, April 2018-April 2019
- ...leisurely lunches at risk of further decline
Figure 15: Change in leisure participation (eg as part of a day out, to catch up with friends), by meal occasions, April 2018-April 2019
- Promote all-day dining
Figure 16: Repertoire of types of meals eaten out of home, April 2019

Venues Visited

- Established venues lost the most lunch visitors in 2019
- Pubs/bars
Figure 17: Change in venues visited for lunch out of home, April 2018-April 2019
- Fast food outlets
- Supermarkets strengthen food-to-go position

Days of the Week Usage

- Late week (Thu-Fri) lunch: focus on full-time workers
Figure 18: Days of the week usage, April 2019
- Monday-Wednesday lunch: focus on leisure

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
 APAC +61 (0) 2 8284 8100 |
EMAIL: reports@mintel.com

Attitudes towards Lunch Out-of-home - UK - June 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 19: Types of occasion, by days of the week usage, April 2019

Sandwich shops and bakeries: usage drops after Wednesday

Figure 20: Venues visited for lunch out of home, by days of the week usage, April 2019

Supermarkets miss out on weekend lunch trade...

...as more people eat lunches at restaurants and fast food outlets on weekends

Figure 21: Days of the week usage, by consumer groups, April 2019

Lunch Meal Preferences

Key consumer groups

Spicy lunches heat up interest of younger consumers

Figure 22: Spicy lunch offers, by Greggs

Figure 23: Lunch meal preferences, April 2019

Especially spicy and non-spicy veggie options

Figure 24: Pick-and-mix pickles by Number 1 Sons, as seen in Washington DC (US)

Figure 25: Flavour type preferences, by consumer groups, April 2019

Potential for pre-packaged foods to drive veggie sales

Figure 26: Product type preferences, by consumer groups, April 2019

Meat eaters and Flexitarians not keen on reduced fat options

Figure 27: Calorie content preferences, by consumer groups, April 2019

Lunch Behaviours

City dwellers avoid eating meat at least one day a week

Figure 28: Behaviours related to eating lunch out of home, April 2019

Young and working professionals are "creatures of habit"...

...but healthy eating trends can disrupt their habits

Family-friendly meal deal combinations – CHAID analysis

Figure 29: Attitudes towards lunch out of home – CHAID – Tree output, April 2019

Perceptions of Lunch Ranges

Restaurants have the most accolades

Figure 30: Perceptions of different operators' lunch ranges, correspondence analysis, April 2019

Sandwich/bakery shops are most comforting

Figure 31: Perceptions of lunch meals, April 2019

Supermarkets' lunch options are bland

Most have a negative view of the lunch options at a fast food outlet

Most consider coffee shops to be expensive

Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Consumer research methodology

CHAID methodology

Figure 32: Attitudes towards lunch out of home – CHAID – table output, April 2019

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Attitudes towards Lunch Out-of-home - UK - June 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Correspondence analysis methodology

Figure 33: Attitudes towards lunch out of home – Correspondence analysis, June 2019

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com