

Attitudes towards Casual Dining - UK - June 2017

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"Diners are coming through the doors because of set menus and freebies but they are also demanding greater customer experience. With home delivery, operators can cater to diners who are not inclined to travel for a casual meal. Operators are extending trading hours, offering all-day meals to make better use of expensive property prices."

– **Trish Caddy, Foodservice analyst**

This report looks at the following areas:

- **Freebies and promotions give diners a reason to come through the door**
- **Restaurants need to redouble efforts to up the diner experience**
- **Diners have high expectations on food and drink options**

Price promotions and healthy options are attracting diners to visit casual dining restaurants. However, this does not translate to brand loyalty as most diners visit different types of casual restaurants, making it harder for operators to get them to come back more frequently.

The population growth spurt of over-55s and 5-14-year-olds between 2016 and 2021 should make catering for these groups more important. High food hygiene ratings and set menu options are important to older cohorts, while free kids' meals and activities on menus to entertain kids while they wait for food to arrive will encourage more families to visit.

Diners are not inclined to travel too far to a casual dining restaurant, nor do they have the patience to collect loyalty points over a period of time. The pressure is mounting on operators to give instant rewards for diners' loyalty and roll out home delivery to cater to diners who are not keen to travel for a casual meal.

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

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The Market – What You Need to Know

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Businesses face headwinds...
...despite consumers' appetite

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Dining out remains a key discretionary spending area...

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Giraffe Concepts

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The Restaurant Group

Frankie & Benny's

Chiquito

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Casual Dining Restaurant Group

Figure 17: Key financial data for Casual Dining Restaurant Group, 2015-16

The Fulham Shore

Figure 18: Key financial data for The Fulham Shore, 2015-16

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Figure 19: Key financial data for Prezzo Ltd, 2014-16

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Pho

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Leon partners HelloFresh

Breakfast on-the-go occasions

Polpo

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Eco-friendly restaurants

Le Pain Quotidien achieves carbon neutral status

Nando's opens eco-friendly restaurant

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Zonal provides integrated solutions for PizzaExpress

Bookatable integrates with Apple Maps

OpenTable utilises Facebook Messenger

5loyalty creates bespoke mobile app for Friska

Price promotions to drive footfall

Busaba Eathai 99p Blue Monday

Pizza Hut's Collection Exclusive

CityMunch app

MealFix's voucher-based lunch subscription

Partnerships with media

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#BellaWimpyKid

Harry Ramsden's used Storcks to introduce new meal deals

Aardman designs Las Iguanas' kid's menu

Bottomless brunch

Pix

Smokey Tails

KuPP

Craft beer collaborations

Wagamama x Meantime

Bundobust's Bombay Dazzler

Takeaway and home delivery becomes mainstream

Nando's trials home delivery

Specialist delivery attracts investment

Deliveroo expands kitchen and delivery-only format

Jamie's delivers pizza

foodnfilm

Smaller formats

Chick 'n' Sours opens CHIK'N

Yo! Sushi Boypark

Little Bill's

The Consumer – What You Need to Know

Casual dining restaurant usage declines with age

Diners are demanding faster service

Restaurant atmosphere is just as important as the menu

Diners want instant rewards

Diners expect to see healthy options

Frequency of Visits

Most people eat at pubs/carvery

Pub/carvery and burger restaurants' frequent customers tend to be men...

...as well as parents of young children

Figure 20: Frequency of casual restaurant visits, April 2017

Usage declines with age

Figure 21: Frequency of casual restaurant visits, by age, April 2017

Britons eat at different types of restaurants...

Figure 22: Repertoire of the types of casual dining restaurants used, April 2017

...especially younger diners and parents

Figure 23: Repertoire of the types of casual dining restaurants used, by age groups, April 2017

Restaurant Choice Drivers

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Being conveniently located is more important to older diners...

Figure 24: Convenient location as a factor influencing choice of restaurant, by age and gender, April 2017

...while younger diners want home delivery options

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High food hygiene ratings important to older diners

Figure 26: Factors influencing choice of restaurant, April 2017

Fast speed service encourages all age groups to visit

Understanding Diners' Motivations to Visit

Discounts/rewards during quiet times of the day can drive footfall

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Non-food deals appeal to young diners and parents

Takeout functions appeal to young diners

Click-and-collect options

Grab-and-go options

Younger diners are influenced by online reviews

Menu Expectations

Older diners expect all-day set menu options

Women have an appetite for healthy options

Healthy meal alternatives...

...snacks/light meals...

...and healthy drinks

Older women are interested in shareable dishes

Women expect weekday lunch promotions

Figure 28: Menu expectations at casual restaurants, April 2017

Attitudes towards Casual Restaurants

More women agree that restaurant atmosphere is as important as the menu...

...while more young men feel awkward dining alone

Figure 29: Attitudes towards casual restaurants, April 2017

Casual restaurants serve higher quality food than fast food restaurants...

...but independent restaurants offer better customer service

Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Consumer research methodology

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