

Fast Casual Restaurants - UK - 2021

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This report looks at the following areas:

- The impact of COVID-19 on fast casual restaurants (ie those using limited service models)
- How fast casual restaurants can boost both on- and off-premises sales beyond the pandemic
- Consumers' attitudes towards eating out, focusing on fast casual restaurant innovations
- How the pandemic will shape the future of food halls

Food halls will be a popular destination for accessing fast casual restaurants, with 55% of 16-34 year olds saying they are likely to eat in at a food hall in the next six months. Consumer interest in visiting a food hall is largely driven by the pleasure of accessing different food and drink offerings from different restaurants, and therefore 58% of those who are likely to eat in at a food hall in the next six months agree that visiting a food hall is more enjoyable than visiting one restaurant only.

The pandemic has forced fast casual restaurants to ramp up their takeaway offerings. Operating 'dark kitchens' is a great way for operators to expand food delivery reach by drawing people directly to their business rather than paying huge overhead costs of running a bricks-and-mortar restaurant. Promisingly, two fifths of limited-service restaurant users agree that ordering from delivery-only dark kitchens is just as good as ordering from a conventional food outlet/restaurant.

With unemployment expected to rise in 2021 before returning to pre-COVID-19 levels in 2024, this will result in more polarised consumer behaviour as consumers losing their jobs will be restricted by tighter budgets when it comes to things like eating at fast casual restaurants. Meanwhile, many of those still in full-time employment have built up savings during the pandemic, and spending this money on experiences such as eating is towards the top of their priority list.



"The pandemic has caused a blurring of lines within the foodservice market as fast casual restaurants encroach into the space occupied by full-service restaurants by offering enhanced service features such as table service. Likewise, the use of better ingredients makes it more worthwhile for consumers to visit a fast casual restaurant than a fast food chain."

- Trish Caddy, Senior Foodservice Analyst

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As foodservice categories continue to blur the lines, fast food outlets and self-service restaurants would be wise to embrace some of the elements of the limited service restaurant model to appeal to discerning diners with heightened awareness of greater dining experiences in the wake of the pandemic. This includes offering table service as part of a fast casual restaurant model to compete with full-service restaurants. Likewise, the use of better ingredients makes it more worthwhile for consumers to visit a fast casual restaurant than a fast food chain.



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Table of Contents

OVERVIEW

- Key issues covered in this Report
- COVID-19: market context
- Economic and other assumptions
- Covered in this Report

EXECUTIVE SUMMARY

- **Impact of COVID-19 on fast casual restaurants**
Figure 1: Short-, medium- and long-term impact of COVID-19 on fast casual restaurants
- **The market**
- **Well-off consumers driving fast casual restaurant usage**
Figure 2: Expected usage of limited service restaurants over the next six months, by financial situation, 2021
- **Formalisation of fast food concepts**
- **Companies and brands**
- **Emergence of in-store fast casual concepts**
- **Dark kitchens to meet delivery demand**
- **Food halls expected to re-emerge**
- **The consumer**
- **More people drawn to greater dine-in experiences**
Figure 3: Eat-in participation expected over the next six months, 2021
- **Busy British lifestyles drive frequent takeaway usage**
Figure 4: Frequency of takeaway/home delivery expected over the next six months, 2021
- **The clean versus attractive interior**
Figure 5: Purchase drivers over the next six months, 2021
- **Justify higher prices with food cooked from scratch**
Figure 6: Attitudes towards eating out, by types of foodservice expected to be used over the next six months, 2021
- **Unlimited offers encourage one in four to visit**
Figure 7: Motivations for trying a food outlet/restaurant, 2021
- **All-day dining caters to city-based workers**
Figure 8: Attitudes towards eating out – CHAID – Tree output, 2021
- **More than half of under-35s will visit a food hall soon**
Figure 9: Food hall usage expected over the next six months, 2021

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ISSUES AND INSIGHTS

- **Three powerful hooks for fast casual restaurants**

- **Fast like fast food**

- **Brand awareness is key**

Figure 10: MEATliquor operates The Dartmouth Arms, 1 July 2021

- **So is a signature dish**

- **The challenge of serving frugal diners and staying profitable**

- **Frugal consumers want unlimited offers**

- **Deliver value via dark kitchens**

- **Diversify formats to cater to dispersed consumer base**

- **In-store catering**

- **Drive-throughs**

- **Food halls where it's at**

THE MARKET – KEY TAKEAWAYS

- **Consumers' spending power will become more polarised**
- **Well-off consumers driving fast casual restaurant usage**
- **Impact of consumer confidence in cooking at home**

MARKET DRIVERS

- **Formalisation of fast food concepts**
- **Barriers to using fast casual restaurants**
- **Impact of job losses**

Figure 11: Unemployment rate forecast, 2020-25

- **Well-off consumers driving fast casual restaurant usage**

Figure 12: Expected usage of limited service restaurants over the next six months, by financial situation, 2021

- **Impact of consumer confidence in cooking at home**

Figure 13: Food behaviour towards eating the main meal of the day at home

- **Impact of national reopening of indoor vs outdoor dining**

Figure 14: Sitting outdoors vs indoors participation plans, 2021

Figure 15: Attitudes towards eating out, by types of food services expected to be used over the next six months, 2021

- **Young 'foodies' appetite for new flavours**

Figure 16: Attitudes towards 'foodie-ism', 2021

COMPANIES AND BRANDS – KEY TAKEAWAYS

- **In-store fast casual concepts**
- **Dark kitchens to meet delivery demand**
- **Food halls expected to re-emerge**
- **Nando's leads the fast casual segment**

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- **The rise of queue management technology**

MARKET SHARE

- **Nando's leads the fast casual segment**
Figure 17: Selected fast casual restaurants, by number of outlets (UK), 2021
- **Food halls expected to re-emerge**
Figure 18: Selected food halls and/or markets, by number of sites, 2021

LAUNCH ACTIVITY AND INNOVATION

- **Digital innovation**
- **Virtual queues**
- **QR code ordering**
Figure 19: Example of digital ordering, 2021
- **Retail innovation**
- **In-store fast casual concepts**
- **Dark kitchens**

THE CONSUMER – KEY TAKEAWAYS

- **Cautious consumer rebound to be expected**
- **More people drawn to greater dine-in experiences**
- **Three in four will order a takeaway**
- **The clean versus attractive interior**
- **Justify higher prices with food cooked from scratch**
- **Unlimited offers encourage one in four to visit**
- **Use dark kitchens to expand delivery reach**
- **More than half of under-35s will visit a food hall soon**

IMPACT OF COVID-19 ON CONSUMER BEHAVIOUR

- **COVID-19's lasting impact on takeaway usage**
Figure 20: Changes in consumers shopping more online, by consumers spending more on takeaways/home delivery
- **Cautious consumer rebound to be expected**
Figure 21: Consumer spending on dining out

FUTURE EAT-IN PARTICIPATION

- **Three in four will dine out**
Figure 22: Eat-in participation expected over the next six months, by age, 2021
- **More people drawn to greater dine-in experiences**
Figure 23: Eat-in participation expected over the next six months, 2021
- **Most people use one or two types of restaurant formats**

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- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
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Figure 24: Repertoire of types of food services expected to be used over the next six months, 2021

FUTURE TAKEAWAY/HOME DELIVERY PARTICIPATION

- Three in four will order a takeaway**
 Figure 25: Takeaway/home delivery participation expected over the next six months, by age, 2021
- Busy British lifestyles drive frequent takeaway usage**
 Figure 26: Frequency of takeaway/home delivery expected over the next six months, 2021
- Fast casual restaurants catering to both on and off premises**
 Figure 27: Frequency of takeaway/home delivery expected over the next six months, by types of food services expected to be used over the next six months, 2021
- Delivery service users warm up to dark-kitchen concepts**
 Figure 28: Attitudes towards eating out, by types of food services expected to be used over the next six months, 2021
- Delivery service users discern the value of scratch cooking**
 Figure 29: Attitudes towards eating out, by types of food services expected to be used over the next six months, 2021

FUTURE PURCHASE DRIVERS

- The independent versus well-known chain**
 Figure 30: Purchase drivers over the next six months, 2021
- Contact-free versus traditional dining experiences**
- The clean versus attractive interior**
- Fresh ingredients versus signature dishes**

WAYS TO BUILD CONSUMER CONFIDENCE

- Figure 31: Attitudes towards eating out, 2021
- Justify higher prices with food cooked from scratch**
 Figure 32: Attitudes towards eating out, by types of food services expected to be used over the next six months, 2021
- Strike a balance between technology and the human touch**
 Figure 33: Attitudes towards eating out, by types of food services expected to be used over the next six months, 2021
- Offer both indoor and outdoor dining**
 Figure 34: Attitudes towards eating out, by types of food services expected to be used over the next six months, 2021
- Branding is a must for fast casual restaurants**
 Figure 35: Attitudes towards eating out, by types of food services expected to be used over the next six months, 2021

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
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MOTIVATIONS FOR FAST CASUAL USAGE

- Unlimited offers encourage one in four to visit**
 Figure 36: Motivations to visit, 2021
 Figure 37: Motivations for trying a food outlet/restaurant, by types of food services expected to be used over the next six months, 2021
- Open kitchens for transparency and entertainment**
- A sweet ending for people to indulge**
 Figure 38: A wide range of cakes and ice-cream, as seen in Coffeesmith (Singapore)
- Drive-throughs meet demand for greater takeaway options**

EMERGING FAST CASUAL CONCEPTS

- Figure 39: Attitudes towards eating out, 2021
- In-store catering helps to extend a brand**
 Figure 40: Attitudes towards eating out, 2021
 Figure 41: Example of limited service restaurant inside of a retail shop, as seen in Café&Meal MUJI (Singapore)
- Use dark kitchens to expand delivery reach**
 Figure 42: Attitudes towards eating out, by types of food services expected to be used over the next six months, 2021
- All-day dining caters to city-based workers**
 Figure 43: Attitudes towards eating out – CHAID – Tree output, 2021
- Co-working space offers ‘the best of both worlds’**
 Figure 44: Attitudes towards eating out, by types of food services expected to be used over the next six months, 2021
- Televised fixtures can help kick off fast casuals**
 Figure 45: Attitudes towards eating out, by types of food services expected to be used over the next 6 months, 2021
- A ‘modern’ look differentiates fast casual from fast food**
 Figure 46: Attitudes towards eating out, by types of food services expected to be used over the next 6 months, 2021
- Digital menus more efficient**
 Figure 47: Attitudes towards eating out, by types of food services expected to be used over the next six months, 2021
- Meal kits fill the gap between eating out and cooking at home**
 Figure 48: Motivations for trying a food outlet/restaurant, by types of food services expected to be used over the next six months, 2021
- Meal plans offer hassle-free pre-ordering options**
 Figure 49: Example of meal plans for a fixed price

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

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- **Meat-free options cater to flexitarians**

ATTITUDES TOWARDS FOOD HALLS

- **More than half of under-35s will visit a food hall soon**
Figure 50: Food hall usage expected over the next six months, 2021
- **Food halls more enjoyable**
Figure 51: Attitudes towards eating out, by food hall usage expected over the next six months, 2021
- **Clean, familiar and aesthetically pleasing**
Figure 52: Purchase drivers over the next six months, by food hall usage expected over the next six months, 2021
- **Modernising the buffet format**
Figure 53: Features that encourage eating out, by food hall usage expected over the next six months, 2021

APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

- **Abbreviations**
- **Consumer research methodology**
- **CHAID analysis methodology**
Figure 54: Attitudes towards eating out – CHAID – Table output, May 2021

What's included

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- Full Report PDF
- Infographic Overview
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