



Trends ROUNDUP

We may be experiencing some uncertain times, but what has this meant for our industry, what trends are we seeing, and how can we adopt them in our businesses going forward? In this quarter's insights, we'll cover a few key areas that we think have brought significant change to our sector, including:

- Addressing the challenge of the restaurant experience in your home.
- Technology becoming a critical part in how we serve customers.
- A deeper understanding and consideration for the planet and how we are impacting it — or rather not at this time.
- The growth in meat free living, and how restaurants and pubs can continue to support this demand.
- Wider health concerns and considerations.

As we all adapt to a new normal, and while visiting the latest restaurant in person may not be an option, we're looking at how these trends will help us maintain a level of normality and keep enjoying great food.





GENERATION RESTAURANT

- Almost overnight, we have become an online community with the move to working from home when we can, and the increase in our use of communication technology.
- In turn, this is now being reflected in the way we are ordering and consuming food.
- Online delivery and takeaways are emerging from all sectors of eating-out — from high-end restaurants with meal kits, to local restaurants offering meal collection services.
- A 'Create At Home' movement has replaced going out, with pizza and burger kits being offered from local and national restaurants, and a whopping 3 million people have tried a vegetable box scheme or ordered food from a local farm for the first time.
- With many still working from home, new opportunities arise that include weekend-style lunch and brunch.

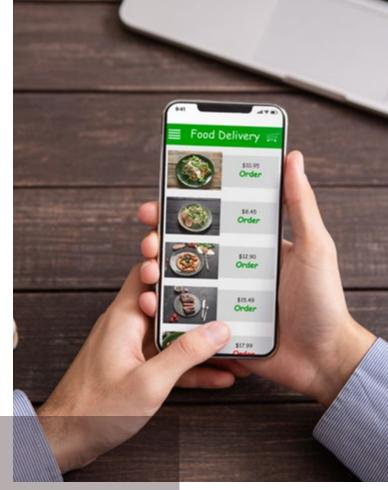


CONSIDER DELIVERY OPTIONS,
HOME COOKING KITS AND TAKEOUT
SOLUTIONS FOR NEW OCCASIONS
SUCH AS BRUNCH.









- A focus on digital communication has resulted in most eating-out experiences pivoting to collection and drive-through services.
- Looking to the future, we could see an increase of 'dark' kitchens, with gardens and outside areas being used for street food style stalls.



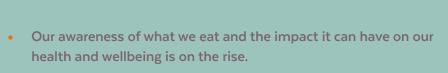
A RANGE OF OPTIONS WILL ALSO BE KEY TO ALIGN WITH DIFFERING CONSUMER FINANCIAL SITUATIONS, AND A SENSITIVITY TOWARDS A POSSIBLE LACK OF EXTRA FUNDS FOR CONSUMERS TO SPEND ON TREAT-EATING OPTIONS IN SOME CASES.











- We are seeing a focus on fibre and how it can help us strengthen our immune system.
- We must consider how we can craft an offer that provides healthy choices, while still being the delicious option.





CONSIDER HOW TO HIGHLIGHT HEALTH BENEFITS OF PROTEIN AND FIBRE ON MENU'S ALONGSIDE OFFERING MEAT FREE OPTIONS OF INDULGENT FOOD.



Taking ACTION

- Our awareness of our impact on the planet has also increased as our new daily routines allow some consumers more time to consider the environmental effects of the pandemic.
- A new responsibility to take care of our planet is emerging, with customers looking for responsible brands.





ADDING THE CARBON FOOTPRINT IMPACT ONTO MENUS WILL LINK INTO THIS CONSUMER DEMAND TO UNDERSTAND THEIR OWN IMPACT ON FOOD CHOICES.









- The vegan society has published figures reporting that 1 in 5 consumers have gone meat free during the pandemic, with the Financial Times also stating that the pandemic is accelerating a move to plant-based and meat free foods.
- New delivery options in the London market include the Simplicity Burger, Neat Burger, family meal boxes from LEON, Pizza Hut, and the Voodie Vegan Burger in Leeds.



INCLUDING DELICIOUS MEAT FREE DISHES ON MENUS IS NOW A GIVEN, AND IT'S IMPORTANT THAT THE CHOICE INCLUDES MORE THAN JUST ONE DISH. GIVING PEOPLE THEIR FAVOURITE DISHES ACROSS ALL DAYPARTS WILL BE ESPECIALLY IMPORTANT.



