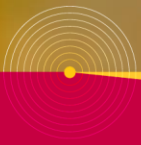


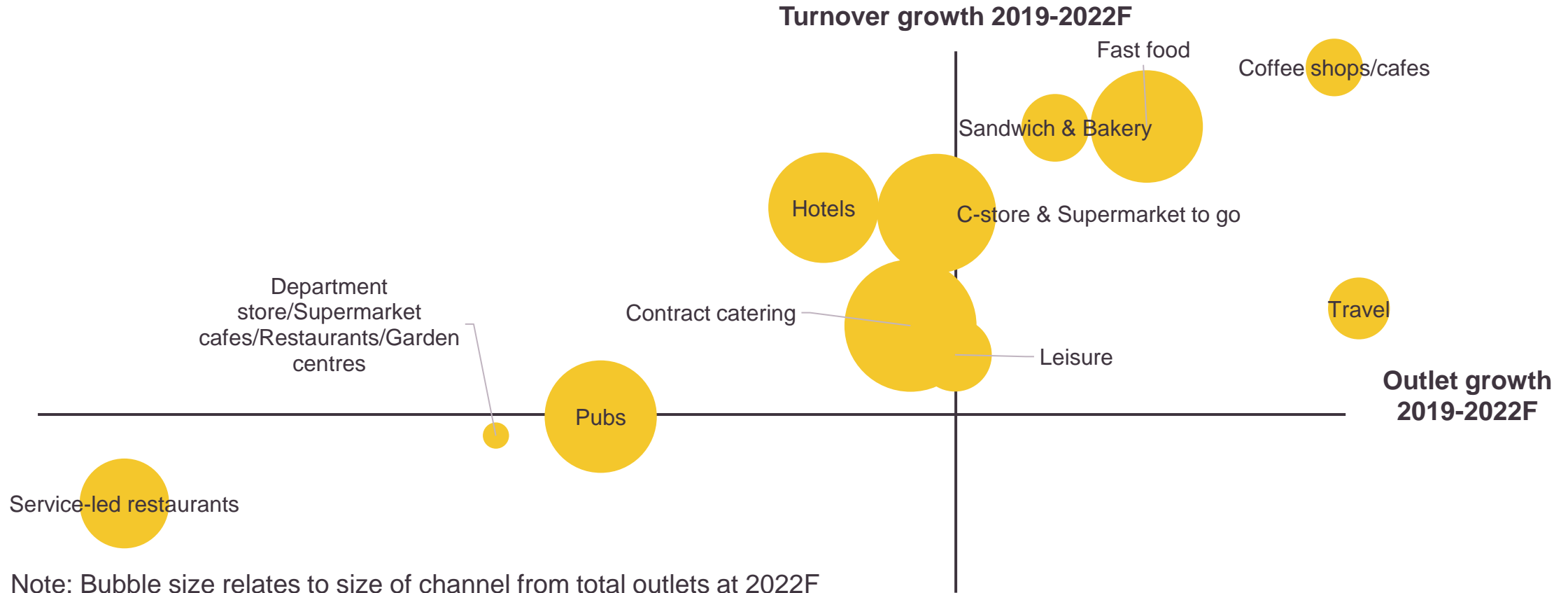
# UK Eating Out Market Report 2022

June 2022



# QUICK SERVICE CHANNELS ARE DRIVING RECOVERY

**Coffee shop/café, fast food and sandwich & bakery channels are among the strongest performing channels from 2019-2022.** These channels have been able to capitalise on quick service operations throughout the pandemic, expanding in a wider range of locations, rolling out tech-led services in store and digitally as well as attracting consumers seeking low ticket solutions.



Source: Lumina Intelligence, June 2022

# OPERATORS TARGET GROWTH IN VARIED FORMATS

Brands across the market are continuing to develop alternative formats and offerings to capitalise on opportunities to reach greater audiences.



**Chopstix** has partnered with UK holiday operator **Haven** to open sites within its **holiday parks**. The first site under the agreement will open at the end of May.



**McDonald's UK & Ireland** will invest over £250 million over the next four years to redesign parts of its restaurant estate to suit the rise of omnichannel ordering.



**Pret A Manger** has launched the first of three **self-service coffee stations** under the concept **Pret Express**.



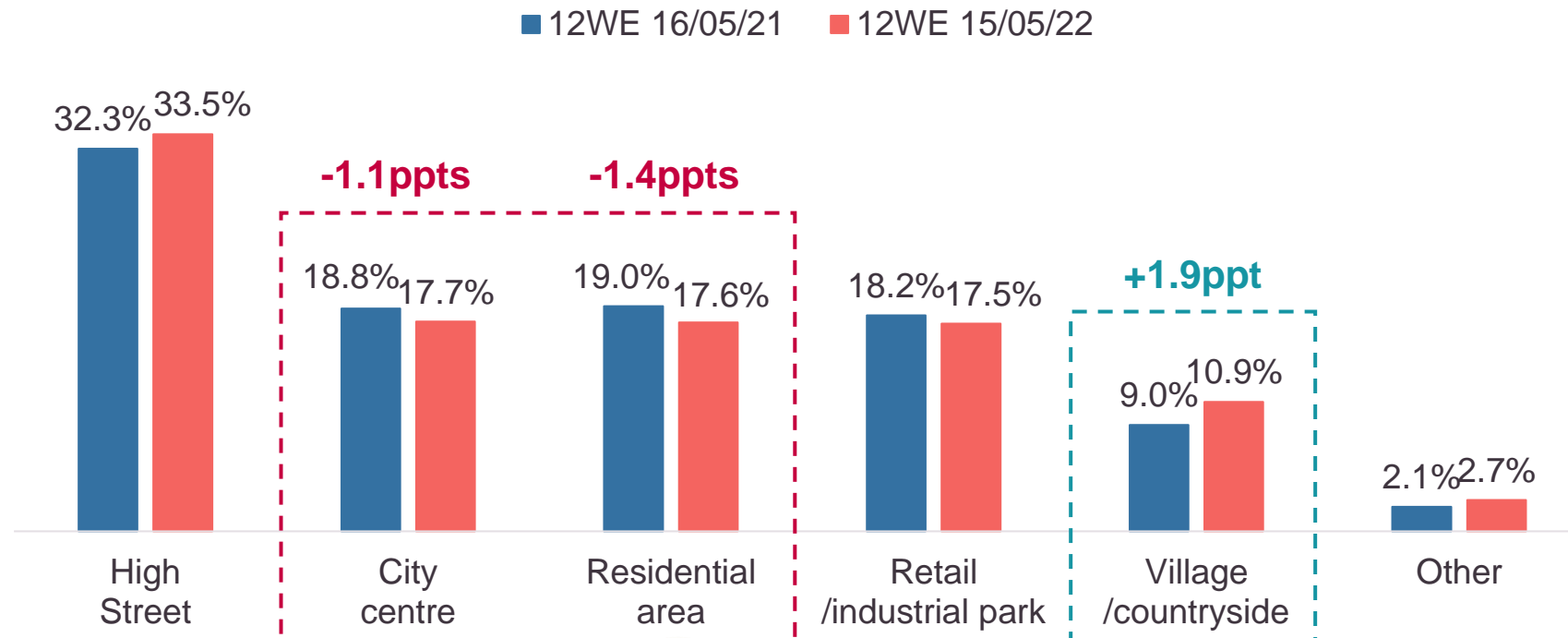
**Caffè Nero** and **Just Eat** have announced an agreement which will see **delivery** offered from over 400 coffee shops across the UK. The partnership will allow Caffè Nero's delivery channel to expand significantly, with Just Eat reaching 97% of all UK postcodes.

The '**Convenience of the Future**' upgrade programme will see McDonald's UK&I shake up the way its restaurants operate to reflect the diverse way customers order. In 2022 McDonald's will introduce Convenience of the Future in 200 restaurants, with 800 conversions planned over the next four years.

# TREND IN LOCAL CONTINUES POST PANDEMIC

Village and countryside locations have increased share year-on-year, up by +1.9ppts, with consumers continuing to spend more time locally as they work from home. City centre occasions have yet to recover post-pandemic, recording fewer occasions than last May. The current pressure on financials is seeing consumers opting to save money through not eating or drinking out on city centre visits. Local operators have opportunities to capitalise on more weekday footfall than before, with more consumers working from home during the week and spending more in their local areas.

## Share of eating/drinking out occasions by outlet area, 12WE 16/05/21 vs 12WE 15/05/22

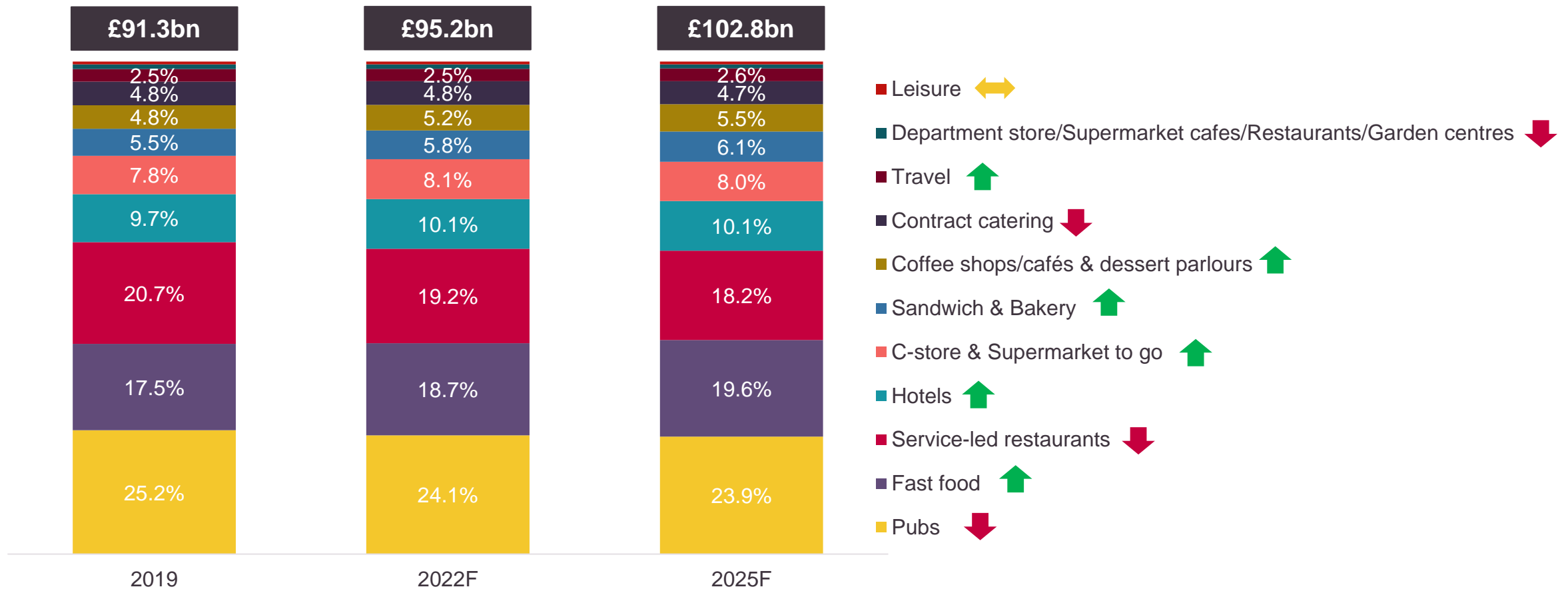


PAPA DUM is a local restaurant near to office areas in London, offering authentic Indian cuisine and meal deals during lunchtime.

Source: Lumina Intelligence Eating and Drinking Out Panel, data collected 12WE 16/05/21 and 12WE 15/05/22

# FAST FOOD MAKES BIGGEST GAIN IN SHARE

Fast food is growing share of the eating out market by turnover, underpinned by strong physical expansion and delivery-service credentials throughout the pandemic and beyond.



Source: Lumina Intelligence, June 2022

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# Get in touch

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