

### January 2018

#### The Leisure Outlook - UK

“Changes in leisure activity participation and spending indicate that consumers are choosing quality over quantity when it comes to drinking and dining out. Increased voucher usage also reflects that Brits are keen to keep up their leisure habits but seeking ways to make this more affordable.”

– Helen Fricker ...

### December 2017

#### Contract Catering - UK

“The contract catering industry has maintained growth over the past year despite reduced margins. Margins were reduced as input costs grew significantly; a result of high inflation disproportionately driving food prices and heightened expenditure on labour forces tied to ongoing increases in the National Living Wage. Due to economic pressure ...

#### Coffee Shops - UK

“Younger Millennials aged 18-27 and parents of under-16s make up the core consumers of the coffee shops market. Younger Millennials are drawn to new product lines, and parents care about ethical sourcing and premium quality experiences. As a group, they are spreading their budget across a larger number of establishments ...

### November 2017

#### Pizza and Italian Restaurants - UK

“Younger Millennials and parents are the core consumers. As a group, parents are not as brand-loyal, prompting brands to work harder to focus on features that are important to them, whereas younger Millennials are more inclined to participate in marketing activities, prompting brands to create lasting relationships with them.” ...

#### Consumers and the Economic Outlook: Quarterly Update - UK

“Consumers’ spending power is being hit by the squeeze on incomes as inflation continues to outpace average wage rises. In four of the last five months, people have been more likely to feel worse off compared to a year ago than to say that their finances have improved. This is ...

### October 2017

#### Attitudes towards Lunch Out-of-home - UK

“Although lunch operators appear to be in good stead as consumers are eating this meal out of home more than a year ago, their drop in financial confidence may impact this over the coming months. If consumers do choose to cut back on lunchtime spending then it is likely they ...

### September 2017

### Eating Out Review - UK

“Parents of under-16s and Millennials are propping up the eating out market. As a group, parents are not brand loyal, but they’re willing to trade up if they feel their purchases are worthwhile. Millennials seem optimistic about their finances, yet they’re also drawn to meal promotions served in a ...

### The Leisure Outlook - UK

“Leisure activities are driven by younger Millennials and parents of under-16s. Eating at pubs is a popular leisure activity, yet so is staying-in and ordering a takeaway. As the pay squeeze intensifies, more people are turning to free activities such as museums and galleries. Meanwhile, people are continuing to focus ...

## August 2017

### Burger and Chicken Restaurants - UK

“Parents are vital to burger and chicken restaurants as the population of 0-14 year-olds grows. Brands are focusing on non-core items to boost snacking occasions, while diners want to see less sugar, fat and salt in burger and chicken meals. Yet the sector is experiencing the halo effect, with diners ...

### Consumers and the Economic Outlook: Quarterly Update - UK

“The snap election clearly unsettled consumers. All three of our measures of sentiment fell between April and May. And the inconclusive result means that there was no immediate bounce in confidence post-election. Instead, our data shows that people were even more concerned after the results were announced than they were ...

## July 2017

### Eating Out: The Decision Making Process - UK

“Special-occasion diners value quality of food more than offers while older diners expect low-priced items. Restaurants are moving away from formal and into homely interior designs to create third spaces for diners to feel at home. Fast food outlets may be attracting diners to visit with free Wi-Fi, but it ...

## June 2017

### Attitudes towards Casual Dining - UK

“Diners are coming through the doors because of set menus and freebies but they are also demanding greater customer experience. This includes fast speed of service and quality of the atmosphere. With home delivery, operators can cater to diners who are not inclined to travel for a casual meal. Operators ...

### Attitudes towards Leisure Venue Catering - UK

“UK consumers are taking part in leisure activities more frequently than in recent years. With the value of the pound being affected by Brexit venues should see further increases in both UK and overseas visitors. Catering facilities at these venues are in a prime position to take advantage of this ...

## May 2017

### Pub Catering - UK

### Pub Visiting - UK

“Value-for-money gastropubs are fuelling the pub sector. Diners want set menus and pubs are premiumising them to chase higher spending. There is potential to boost lunch sales, given that diners are interested in lunchtime takeaway options. However, dishes high in sugar, salt and fat may have to be reformulated if ...

“Continuing to grow sales will be particularly important to pub operators in order just to stand still in terms of profits, given increased operating costs in 2017. Household budgets also look likely to be squeezed during 2017 by rising inflation, impacting on discretionary spending in pubs. This will all make ...

### The Leisure Outlook - UK

“Overall almost all the leisure activities covered have seen increased visitation over the last 12 months which is good news for the industry. It is hard to predict what Brexit will mean in terms of consumer behaviour but it does appear that it is driving more cautious spending and not ...

## March 2017

### Attitudes towards Home-Delivery and Takeaway Food - UK

“Price is a key consideration when ordering home delivery. This translates to lower consumer spend, as opposed to the average dine-in visit at a restaurant. Changing British lifestyles boost takeaway/home delivery services as consumers turn to delivery services to provide quick meals as they find themselves having no time ...

### Consumers and the Economic Outlook: Quarterly Update - UK

“Consumer sentiment has remained strong, reflecting growing real wages, low unemployment and, as yet, the absence of any major economic upheaval post-EU vote. When it comes to the impact of the vote, people are relatively positive about the big-picture issues such as the UK’s economic growth, and most feel ...

### Contract Catering - UK

“Austerity measures have meant continued strong pressure on public sector bodies to cut spending. While this has led to some outsourcing in the contract catering sector, it has also led to intense price competition and even reductions in some existing contracts. This is particularly true in sectors that have felt ...

## February 2017

### Menu Flavours - UK

“The spectacle of freshly prepared food gives people additional reasons to visit a restaurant, given the frugal mindsets of today’s consumer. In terms of flavours, diners want to see more ethnic flavours injected into familiar dishes. When it comes to grab-and-go lunch options, diners seek a wider range of hot ...

**January 2017**

### **Ethnic Restaurants and Takeaways - UK**

“It is becoming more important to provide additional reasons to visit, as ethnic restaurants face mounting pressures on recruitment, rising costs and weakening consumer confidence. Casual dining concepts that focus on communicating good food hygiene and offering leisure experiences should support growth but stand to impact on independent players.” ...