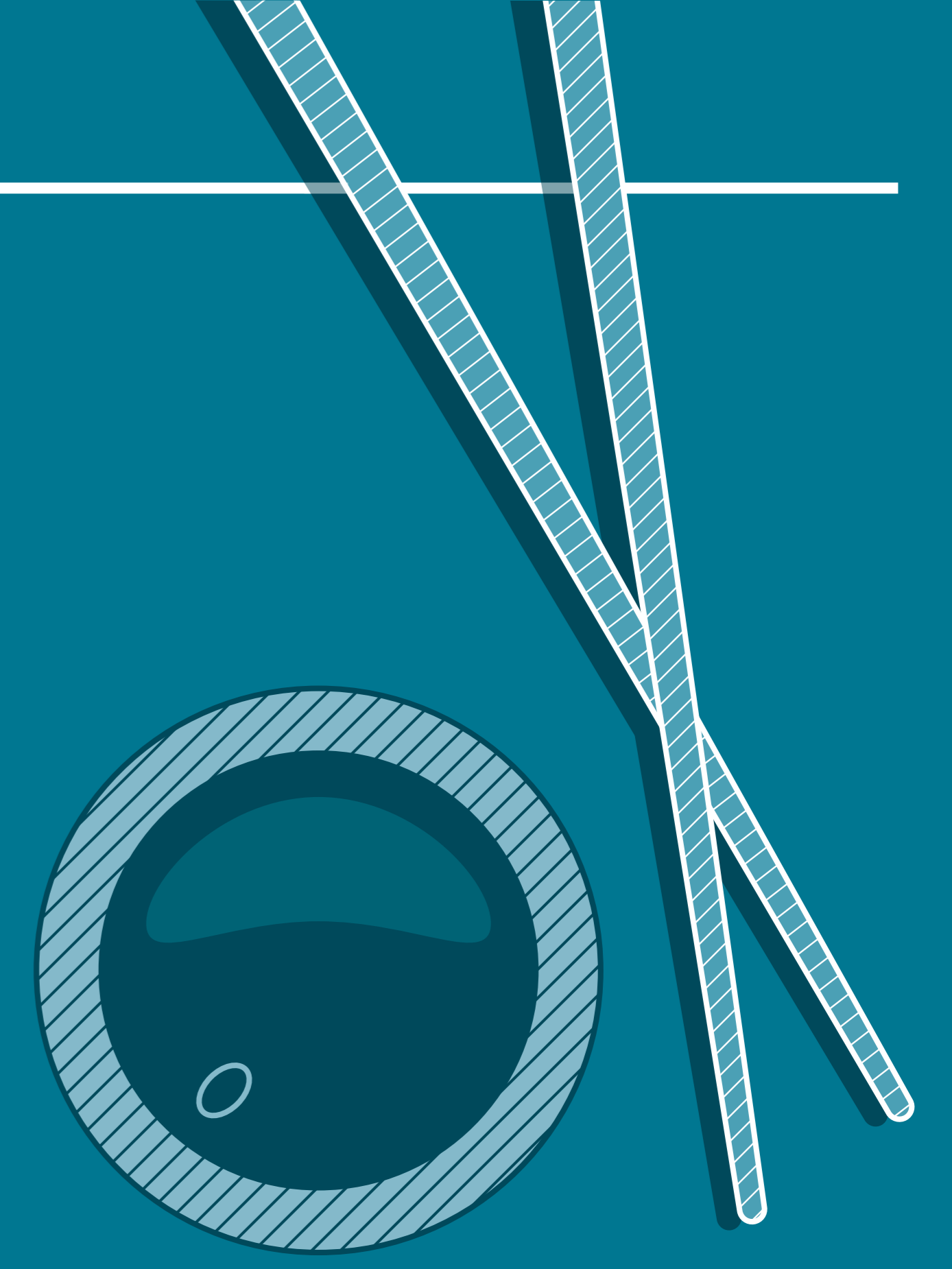
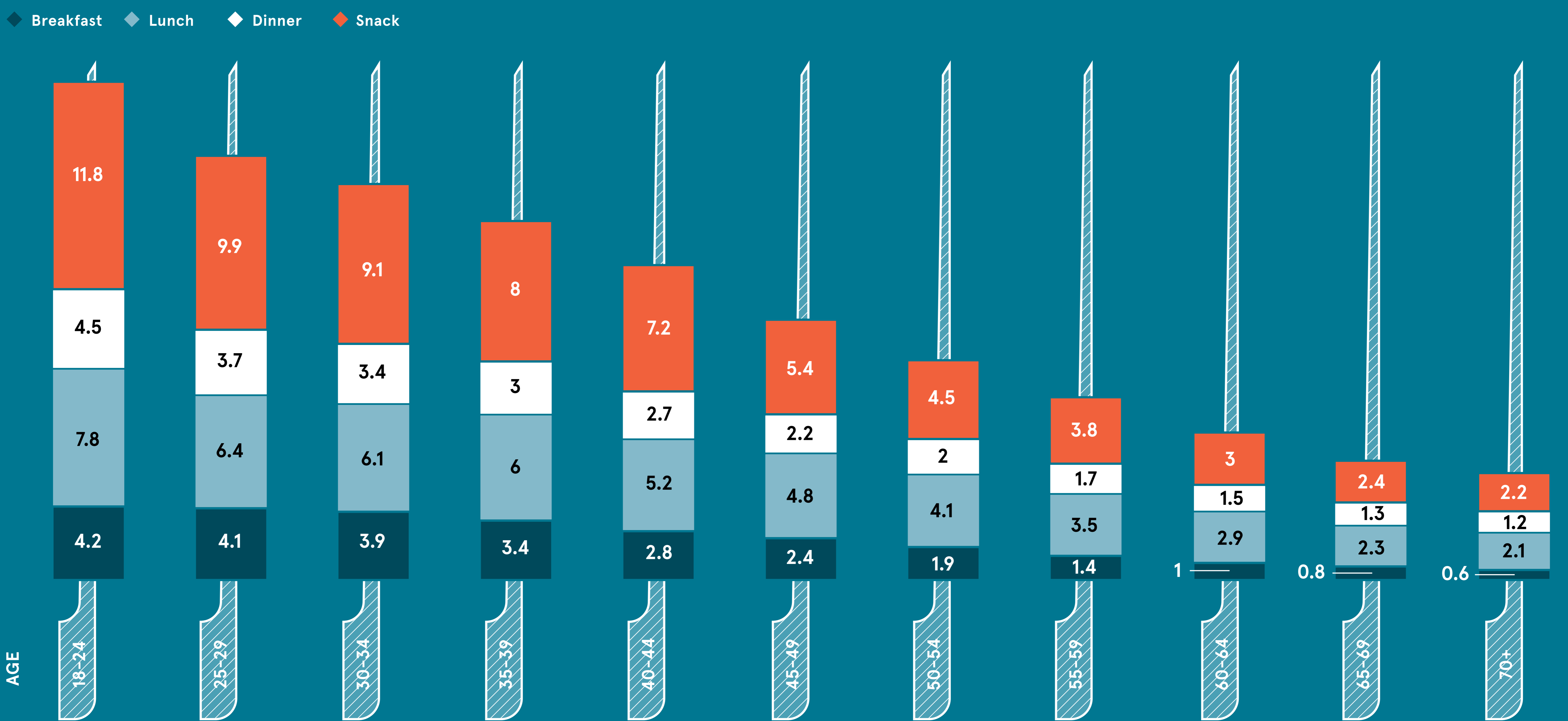


# 7 WAYS UK DINING IS CHANGING



## 01 Younger diners eat out more often

Figures showing the average monthly number of out-of-home meals indicate that younger demographics will shape the future landscape of the restaurant industry

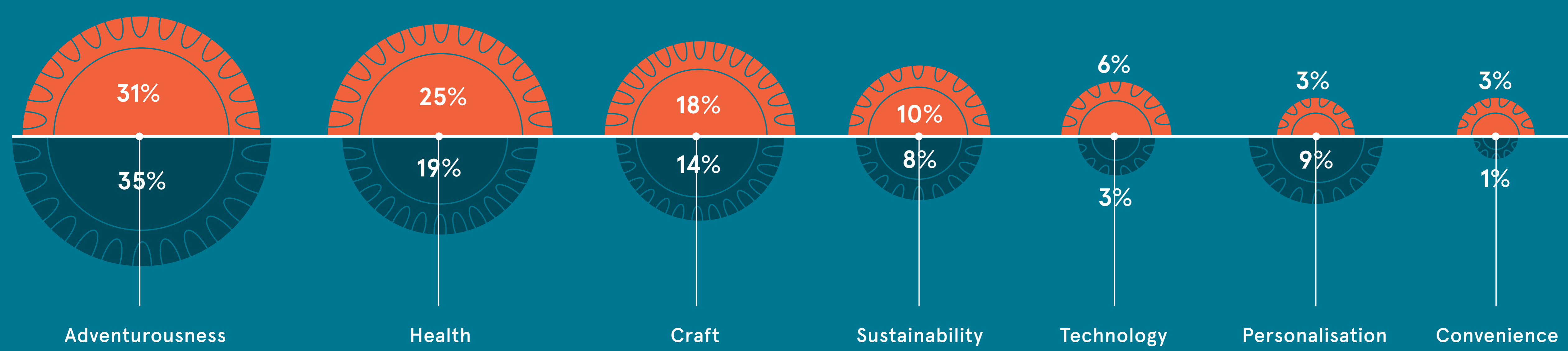


MCA/Deloitte 2017

## 02 Responsible trends are shaping the market

Things diners look for when they eat out (hot food only)

2018 2017



MCA 2018

At a time of shifting dietary needs and eating habits, along with the explosive growth of delivery platforms, the casual eating sector in the UK is struggling, with many well-known chains closing venues or shutting up shop completely. On the face of it, the eating-out market remains in good health, expanding 1.7 per cent to £87.9 billion in 2017, according to MCA. However, while spend per visit has risen 3 per cent, the frequency of visits has dropped 8 per cent, suggesting a more discerning consumer. This infographic takes a look at some of the trends affecting the industry and the reasons behind such disruption

## 03 Instagram has transformed the restaurant experience

30% of 18 to 35 year olds would avoid a restaurant if it had a weak Instagram presence

5 days average time spent a year by this age group browsing food images on Instagram

Zizzi 2017

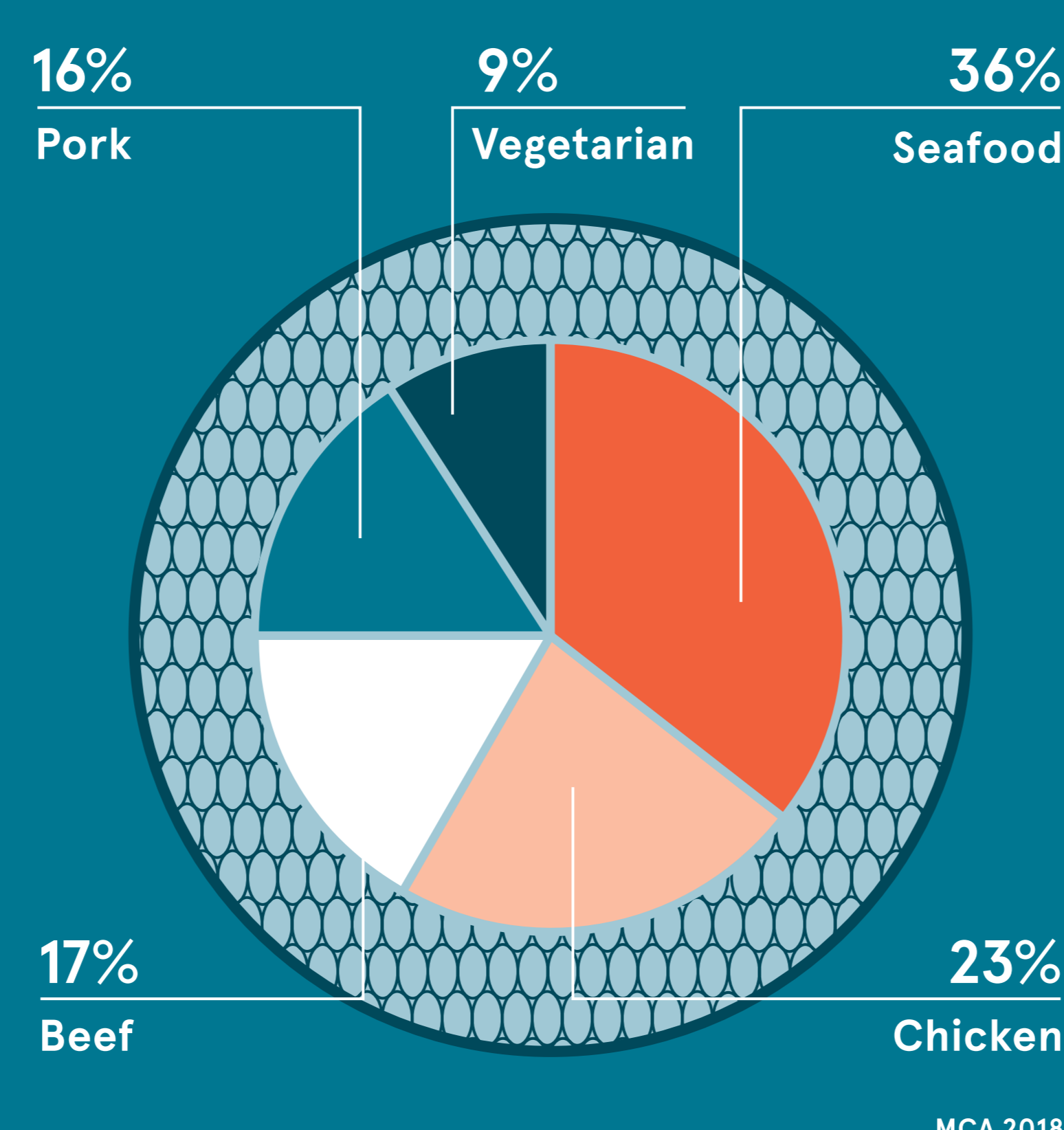
60% of Instagram users following food venues say they have already spent money or are planning to do so there in the future

Only Way Online 2017



## 04 Dietary requirements are changing

Percentages of restaurant mains by protein group show that under one tenth of meals cater for vegetarians despite increasing demands for less meat



MCA 2018

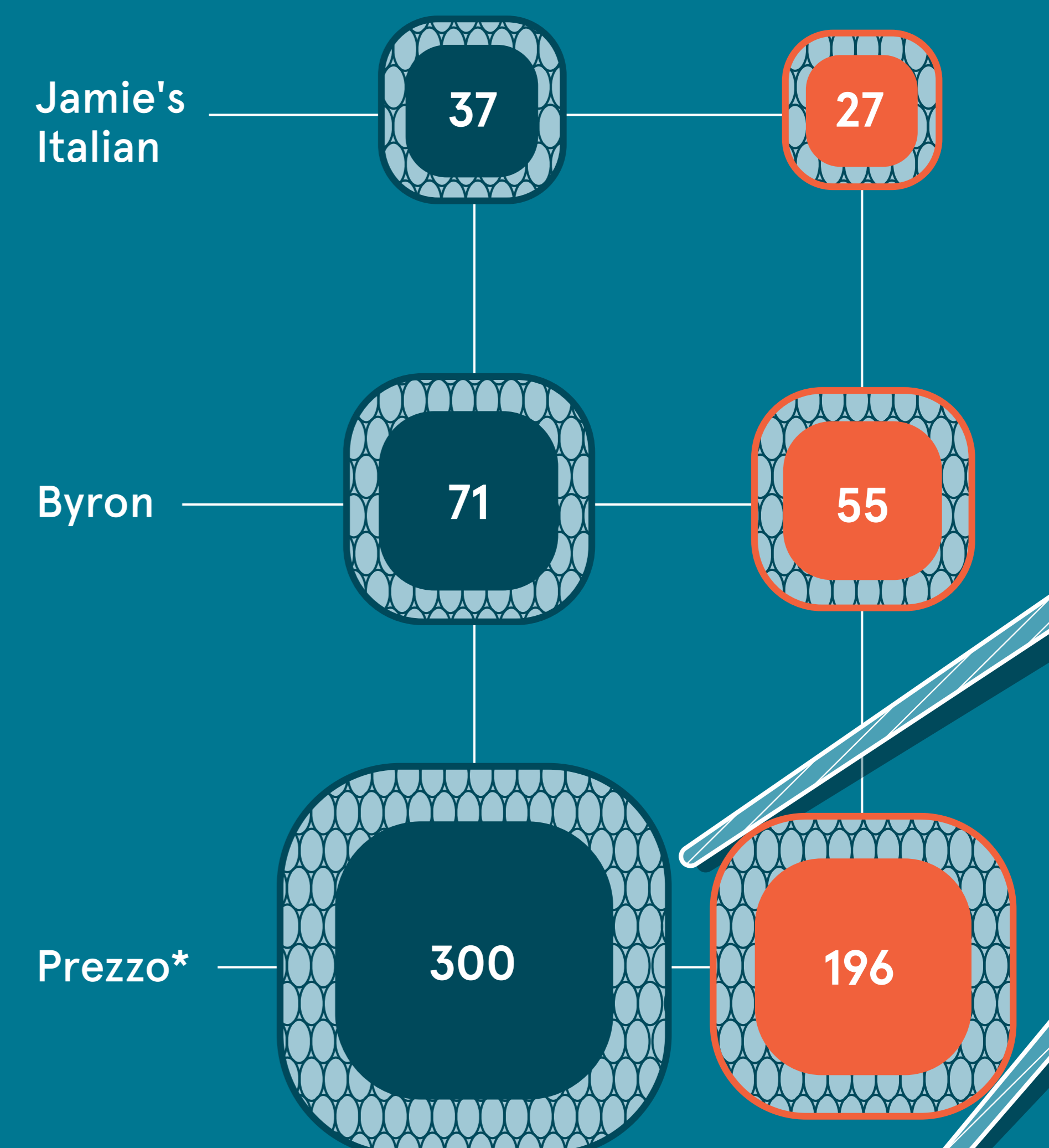
28% of people in the UK identify as meat reducers, with 78 per cent of these avoiding restaurants due to a lack of non-meat options

More Than Carrots 2018

## 06 Closures have plagued the branded sector

Number of UK restaurants of the following brands

Sites at the end of 2017 Sites in mid-November 2018



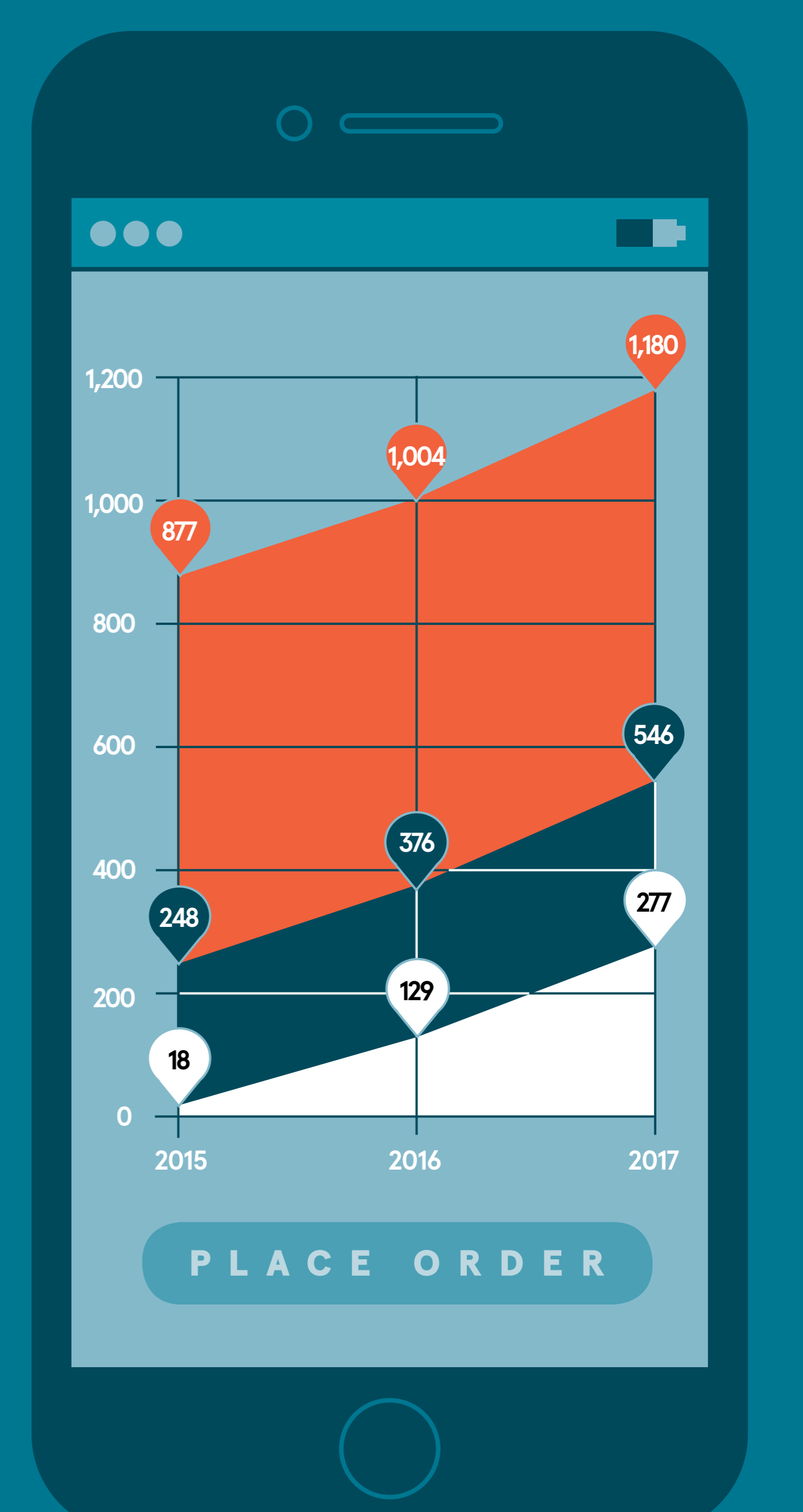
\*Includes other branded restaurants under the Prezzo umbrella Company filings and websites 2018

## 07 Takeaways continue to deliver

Group revenue of takeaway companies (£m)

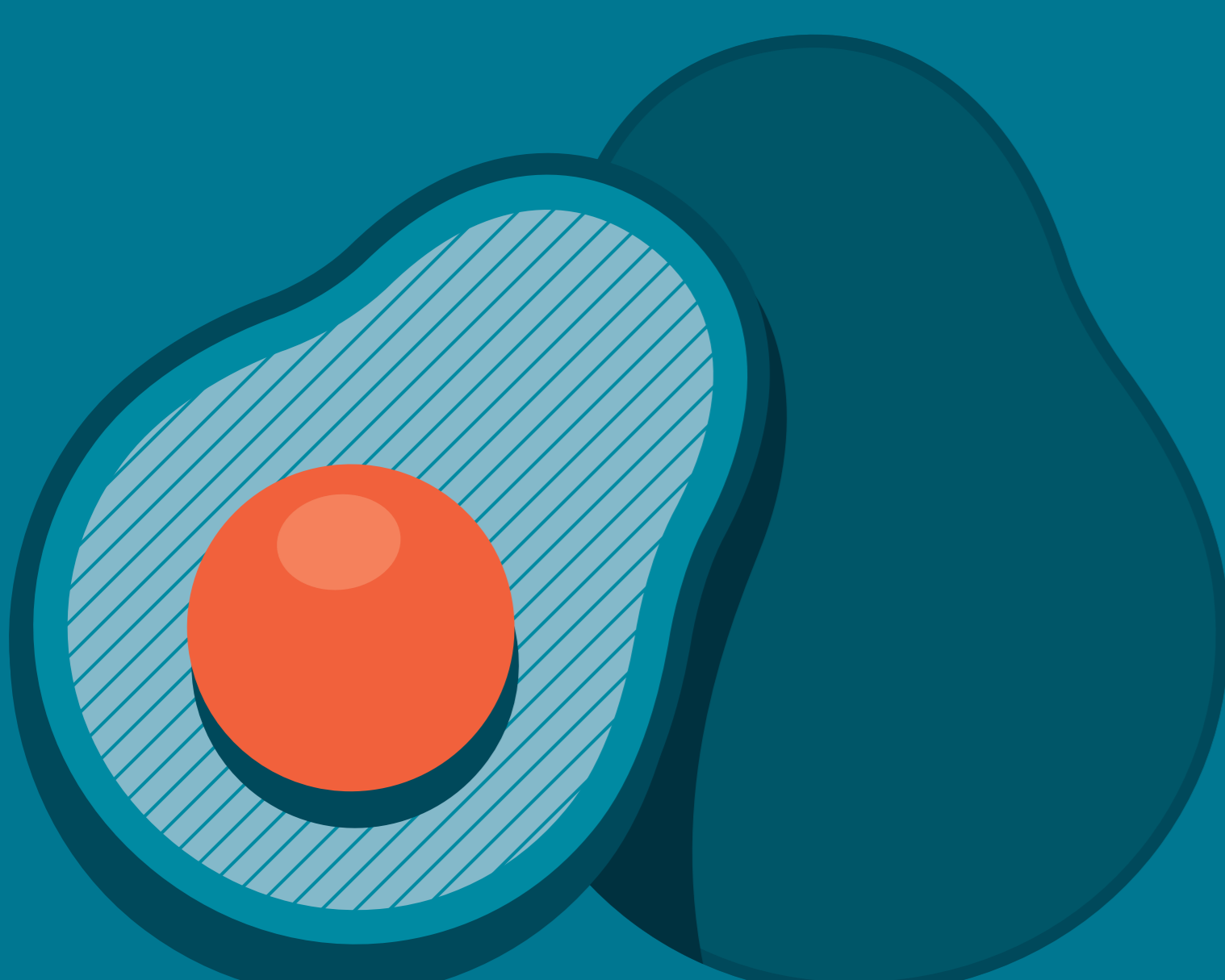
Domino's Pizza Just Eat Deliveroo

Company filings 2018



## 05 Breakfast is big business

Increased demand for high-quality breakfasts and brunches means branded restaurant chains may be losing out on a lucrative, and growing, slice of the food service market through restricted opening times



79.5m Instagram posts tagged with #breakfast

Instagram 2018

508% increase in orders of breakfast takeaway food between 2014 and 2017

CEBR/Just Eat 2017