



SEVENROOMS

COVID Confidence: Part Two

2021 UK Restaurant Industry Report



Foreword



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When we released our first **COVID Confidence** report in 2020, we took a deeper look at how guest behavior had changed since the onset of COVID. The data highlighted the latest customer dining expectations, including new health and safety procedures, communication best practices, and the introduction of contactless technology.

This latest report, **COVID Confidence: Part Two**, looks at how the expectations of UK consumers have evolved, including how a new vaccine programme and extended lockdowns are impacting consumer behaviour as guests return to venues. While the pandemic brought many challenges to the hospitality sector, it has also continued to show the unity and spirit that defines us, and the unyielding passion our operator partners have for providing guests with exceptional experiences, no matter what.

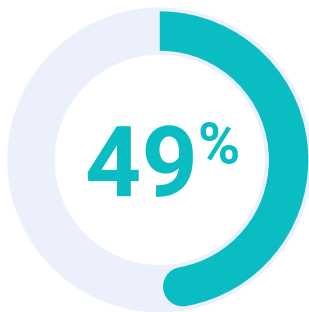
After 18 months of restrictions, diners are excited to get back to the experiences they know and love. As summer continues, there is a big opportunity for hospitality operators to capture this pent up consumer demand. Operators need to be ready to meet and exceed the changed needs of their guests. Success in a post-pandemic environment will rely on operators' ability to deliver exceptional and meaningful experiences to guests wherever they are, and technology has a huge role to play in enabling them to do this effectively. With less resources than ever before – financially, operationally and staff-wise – hospitality operators that leverage technology will be able to do more with less.

We hope this report gives restaurateurs confidence going into the second half of the year to provide guests with the exceptional and personalised experiences that ensure they continue to return.

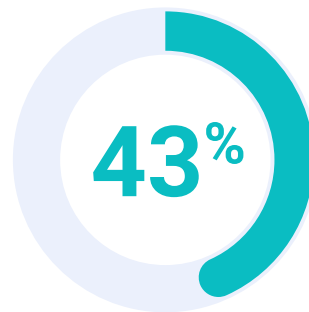
Guest Experience Counts For Everything

As the UK emerges from restrictions that have dominated the past 18 months, the hospitality sector is once again welcoming back guests. Our recent study shows the desire among consumers for regaining what they have missed, with **68% saying the quality of the food is important in making an experience positive and enjoyable, 5% more than in 2020.**

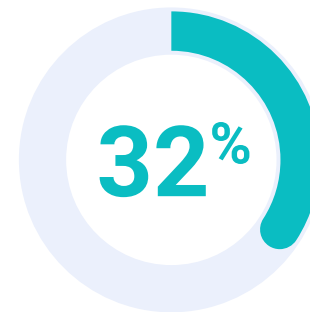
Other factors that hospitality operators should keep in mind when it comes to creating memorable experiences for diners include:



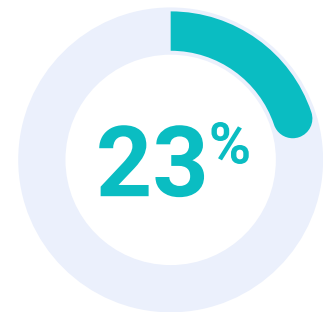
Being able to make a reservation ahead of time



General ambience



Contactless order and payment



**Discounts
(e.g. a free starter or cocktail)**

Encouraging Guest Loyalty & Repeat Business

With operators able to welcome guests back, ensuring they are in a strong position to encourage diners to book and rebook will be critical in the post-pandemic environment.

Understanding what matters to guests and being able meet these requirements plays a huge role in a reservation being confirmed:

35%

want to be able to make reservations that allow social distancing and time between arrivals to minimise contact with other guests

25%

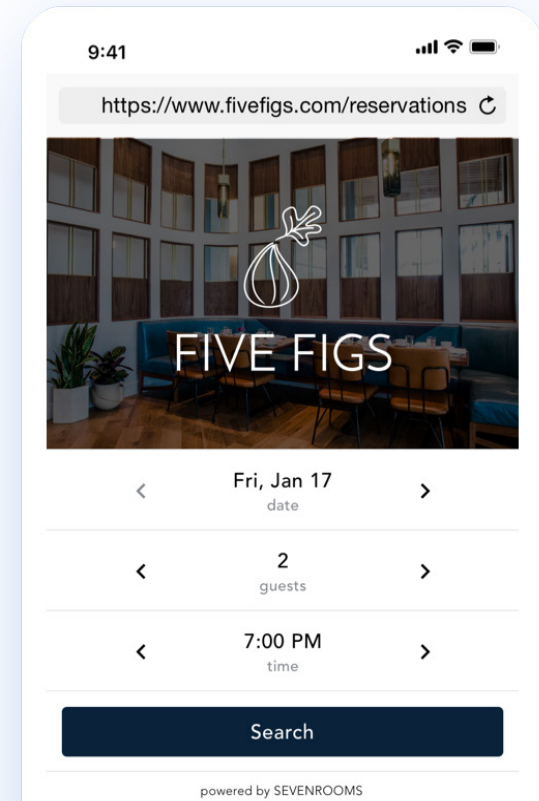
want to be offered a complimentary addition to their meal (e.g. a free appetiser)

22%

want the restaurant to incorporate technology to make the experience safer

20%

want information on what to expect ahead of their visit



When it comes to making a reservation, **38%** of guests now prefer to book direct vs. **29%** in 2020.



Industry Spotlight

Consider Inception Group, the London-based hospitality group that owns and operates high-end bar, restaurant and club concepts. With many customers missing out on birthday celebrations in 2020, they created an email promotion for guests offering a percentage off their check equal to the birthday age missed during lockdown (e.g. 30% off the check if celebrating a belated 30th birthday). The promotion helped drive table reservation and rewarded loyal customers for returning to the venue to celebrate their special occasion – resulting in an increase in revenue.



Preventing A Guest 'No Show'

While the issue of 'no shows' has continued to be discussed within the media, the report reveals that UK diners are more reluctant than ever to fail to turn up for a booking without cancelling.

Over half (56%) state there is no circumstance that they would 'no show' vs. 51% in 2020.

Three reasons why UK diners would 'no show':



18% Crowded venue

18% Negative reviews about COVID-19 health and safety

18% Rise in infections in the local area

Venues should not underestimate the power of a review.

31% of UK consumers say that customer reviews are an important factor in their decision to book a reservation.

This feedback from other diners gives them confidence in a venue's overall approach to the dining experience.

21% of 18-24 year olds claim that negative reviews about the service & experience would cause them to 'no show' for a reservation.

Remaining Mindful Of The Role Of Safety Measures

Despite continued debates around the **potential role of a vaccine passport within hospitality, only 11% of UK consumers** claim they won't feel comfortable dining out until there is a programme in place.

However, as restrictions ease and consumer attitudes towards safety become more relaxed, operators need to be mindful of the part health and safety standards continue to play in boosting guest confidence.

45%

/ want staff in **personal protective equipment** (PPE)

40%

/ want **hand sanitiser** available throughout venues

25%

/ want **COVID safety measures** to be communicated pre-visit

20%

of diners would feel comfortable dining at a restaurant if staff at a venue weren't wearing masks vs. **only 11% in 2020**.



Catering To The Needs Of The 2021 Diner

Diner behaviours and expectations have evolved during the course of the pandemic. For operators, having access to guest data has never been more important for ensuring they understand diner needs – **no matter how a guest chooses to engage with their brand**. This data can, and should, be used to provide top-notch, personalised experiences that drive loyalty.



2021 vs 2020

40%

more inclined to dine at a restaurant they have been to previously

35%

23%

more inclined to dine at an individual restaurant over a chain

18%

21%

more likely to dine at a venue where outdoor seating is available

19%



For more information on SevenRooms, please visit sevenrooms.com

Research Methodology

All figures, unless otherwise stated, are from YouGov Plc – a third-party, professional research and consulting organization.

2021 YouGov Study: Total sample size was 2,068 adults. Fieldwork was undertaken between 21-22 June 2021. The survey was carried out online. The figures have been weighted and are representative of all UK adults (aged 18+).

2020 YouGov Study: Total sample size was 2,214 adults. Fieldwork was undertaken between 25-28 September 2020. The survey was carried out online. The figures have been weighted and are representative of all UK adults (aged 18+).