

A group of people are dining at an outdoor restaurant. They are seated at a long table, eating and talking. The scene is captured in a warm, slightly blurred style, suggesting a social gathering. The background shows a wooden structure and some greenery, indicating an outdoor setting.

# Readying for Recovery

Understanding consumer attitudes to eating out post-lockdown

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# Foreword

“It’s good news for the hospitality industry that our survey found consumers are keen to eat out. It proves how well Food & Beverage operators and brands have responded to the crisis brought on by the global COVID-19 pandemic. This is despite facing significant challenges themselves, affecting their people and ability to manage cashflow, as much as less trade.

“Our research also reveals how important digital has become to maintaining customer engagement while closed, as well as enabling gift voucher sales and home delivery via online. As lockdown begins to ease, digital will be even more vital in building the loyalty and trust consumers are looking for to venture out during this time. It is also where Eagle Eye and QikServe are ideally positioned to help.”



**Al Henderson**  
Chief Sales Officer  
Eagle Eye

“The research QikServe has carried out with Eagle Eye gives the hospitality industry plenty to cheer about: people are keen to go back to their favourite bars, pubs, cafés and restaurants. But, while they are ready and willing to eat out, the caveat is that brands must prioritise their safety. So, digital will be key in facilitating their return, while streamlining already constrained operations at the same time.

“Customers will want to browse digital menus, and order and pay at table using their own phone to safely minimise interaction with servers and handling of payment devices. These tools can also extend any digital connection made online during lockdown into venues, to drive footfall and frequency. This is also how QikServe and Eagle Eye can support efforts to reopen for recovery.”



**Dan Rodgers**  
President & Founder  
QikServe

# Executive Summary

## Understanding consumer attitudes to going out post-lockdown

UK hospitality quarterly sales growth to April 2020 fell by 21.3% due to the impact of closures imposed by the COVID-19 lockdown. But, even before the turbulent period brought on during the first half of 2020 by the global coronavirus pandemic, operators and brands were challenged by consumer trends towards staying home, eating in and streaming leisure and entertainment services.

But the industry has also shown tremendous resilience: embracing online ordering, delivery and gift services; supporting local community, charitable and NHS efforts; and, keeping customers regularly informed. The findings of Eagle Eye and QikServe's joint consumer survey confirm that these activities are also what will entice customers back out and facilitate business recovery plans.

### Dining out drives out-of-home cravings

The most popular out-of-home (OOH) activity that consumers are looking forward to doing first

**67%** of consumers will eat out within a month of restaurants and cafés reopening

**58%** say the first thing they're looking forward to doing is going to a restaurant, or visiting a pub once lockdown ends

as lockdown eases is going to a restaurant (cited by 37% of consumers), while 21% want to visit a pub or bar. The last thing they're likely to want to do is attend a sporting event, according to 42%.

Further, 21% of the survey respondents said that they would eat out immediately, once able. In total, two-thirds (67%) said they would eat out within a month of restaurants and cafés reopening, while 10% said they would wait until cases of COVID-19 are nil, or a vaccine has been made available.

### Compassion, transparency, engagement

Support for the local community, as well as their own staff and frontline workers emerged as the most important thing a business or brand must demonstrate in order to win customers back into pubs, bars, restaurants, cafés and stores.

Clarity over health and safety measures taken during lockdown came second on their list of priorities, closely followed by keeping them informed with timely, relevant communications, cited by 58%. A further 25% said they would be more inclined to choose a business or brand post-lockdown, offering rewards, promotions and/or a loyalty programme that recognises them for their continued custom.

**65%** were more likely to trust a business after lockdown ends that supported their community, staff and other frontline workers

**60%** are looking for them to have been clear about health and safety measures

### Digital becomes essential differentiator

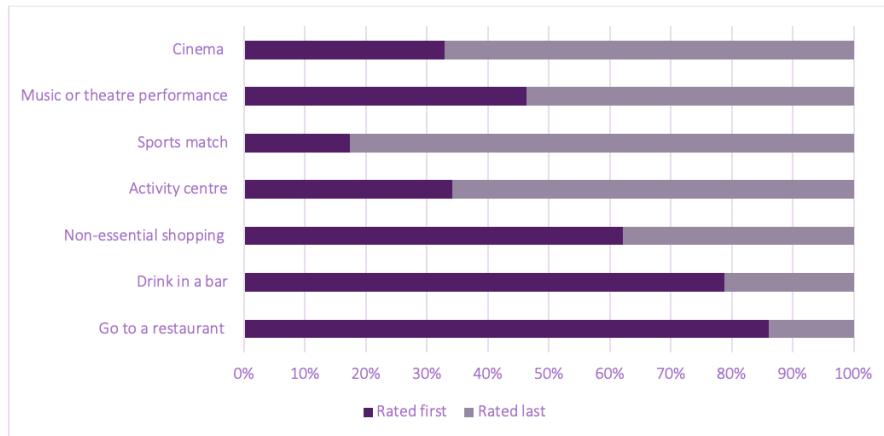
The fact that consumers say they are most likely to visit restaurants first, post-lockdown, means they must be ready to reopen first, subject to more stringent health and safety requirements and strict social distancing measures, as soon as government guidance allows. But every hospitality business will also be judged on their compassion, transparency and engagement during lockdown.

Digital – for its role as an enabler in all of these areas now as they look to recover, as well as while forced to physically close – is now an essential differentiator for all Food & Beverage (F&B) operators and brands. The ability to pivot as quickly to pre-booking, order ahead and pay-at-table now as they did to online delivery during lockdown will be key to maintaining loyalty and building trust for recovery.

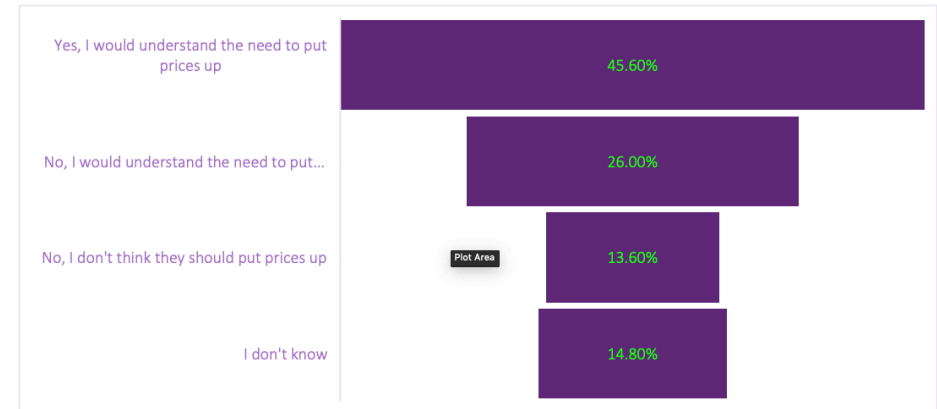
# Trends

## Understanding changing hospitality customer demand

The OOH market has been hit hard by lockdowns around the world. But the UK consumers surveyed said they are looking to dine and drink out first post-lockdown, even before going shopping; while the majority are planning to eat out within a month of restaurants and cafés reopening.

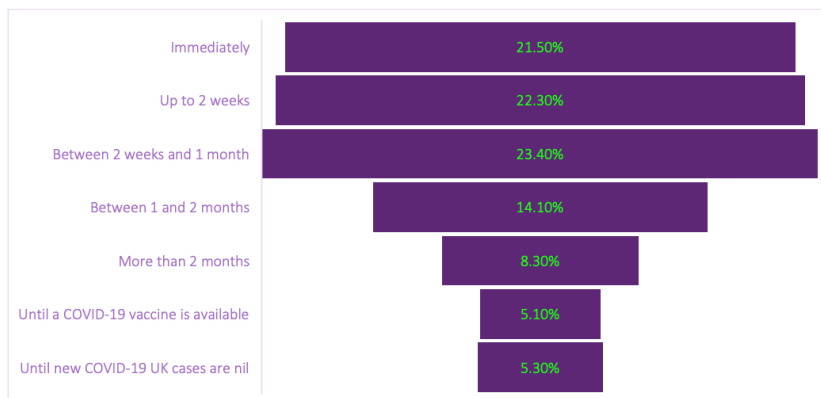


[Fig. 1] Q: When lockdown is eased, what OOH activities are you most looking forward to doing first?

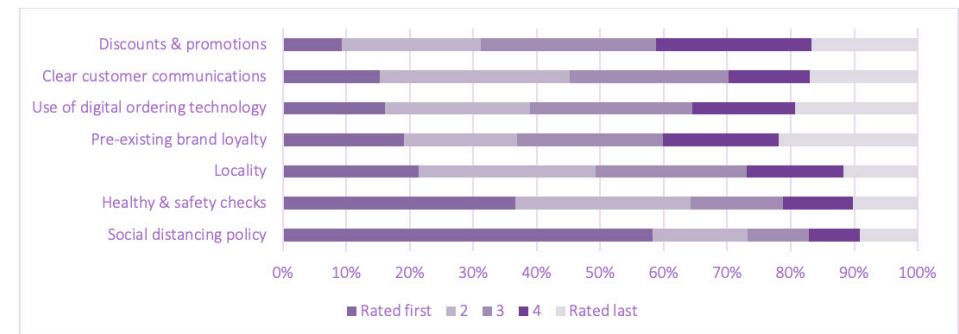


[Fig. 3] Q: If your favourite restaurants put their prices up following the COVID-19 pandemic, would you still eat at them?

A quarter said they would understand price increases to compensate for lockdown losses, but that it would deter them from a visit. Coupled with those who disagree with price hikes, 40% would reject venues that raise prices. Meanwhile, social distancing ranked first of protective measures.



[Fig. 2] Q: Once restaurant restrictions have been lifted, how long will you wait before eating out?

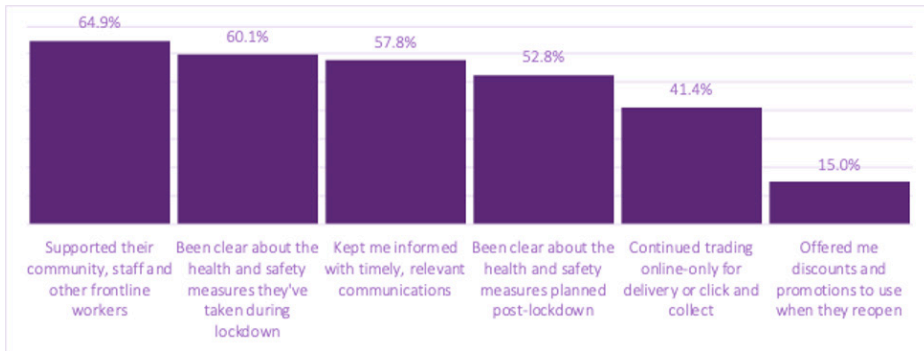


[Fig. 4] Q: How important will these factors be when choosing restaurants to eat in at or take away from post-lockdown?

# Initiatives

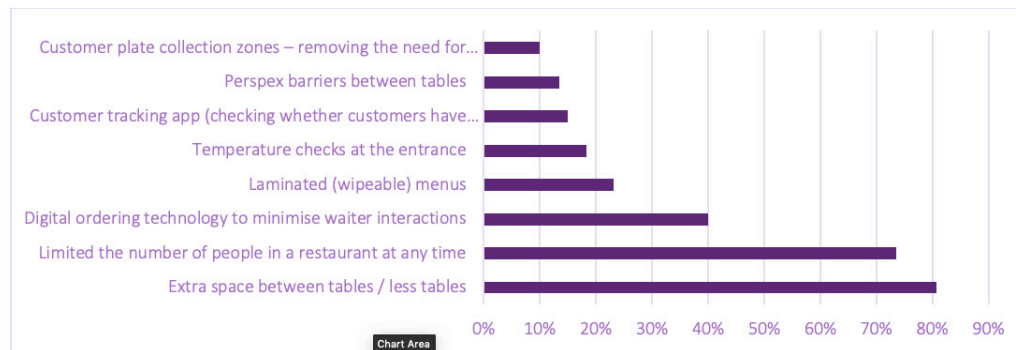
## Meeting customer expectations post-lockdown

Brits clearly want pre-lockdown prices and stringent social distancing policies to venture out. But they also revealed their expectations of operators and brands during lockdown: most important here were compassion, transparency and engagement, while 41% cited online delivery as also important.

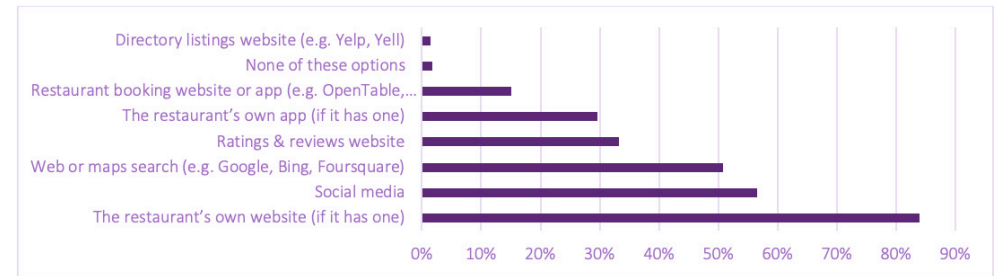


[Fig. 5] Q: Thinking about the retailers, restaurants and brands you feel likely to trust after lockdown ends, what have they done to make you feel this way? (Respondents were asked to select all that apply.)

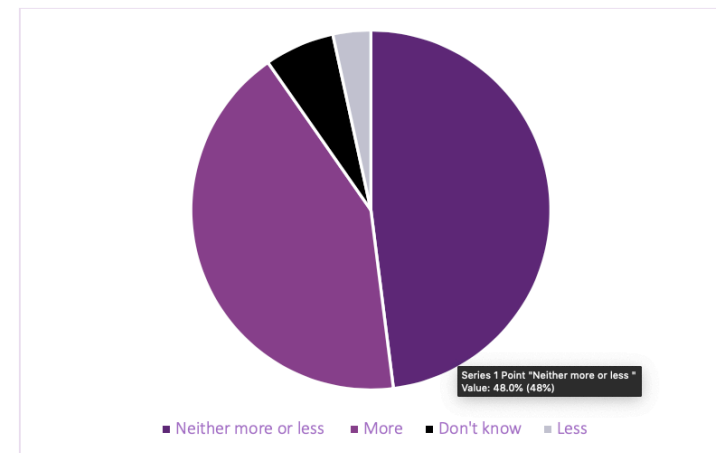
With 25% more likely to trust outlets and brands they were loyal to before lockdown, those with an existing loyal customer base that also built trust during lockdown are best positioned for recovery. Digital has been a key enabler of these activities and will be essential for instilling customer confidence to return, with a direct social media and online presence, delivery and digital ordering.



[Fig. 6] Q: How will you access information about a restaurant you might want to visit post-lockdown?



[Fig. 7] Q: What are the most important ways that restaurants should protect customers visiting hospitality venues, once they reopen?



[Fig. 8] Q: After lockdown ends, are you more or less likely (than before the pandemic) to choose restaurants offering digital ordering?

# Conclusion

## Manage risk and build resilience to support recovery

The research findings are clear: hospitality consumers' loyalty has fared well during lockdown. But they also reveal just how important it has been to manage risk by keeping them updated on response efforts, as well as safety measures, and to potentially maintain some sales through online ordering for home delivery, or gift schemes that can generate revenue against future sales.

So, the steps that bars, pubs, restaurants and cafés take now to retain that loyalty in future must also capitalise on digital. Digital customer connections established before and during lockdown will be even more important for building on the loyalty and trust that consumers are looking for now. They will also be vital to optimise service and manage social distancing restrictions in outlets and venues.

### Enticing customers back to going out

The findings demonstrate how vital clear digital customer communications and engagement are to building resilience to survive beyond this crisis. That customers feel put off by brands increasing their prices is naturally concerning. But it is possible to offset concerns with digital ordering, for example. (see Fig. 8)

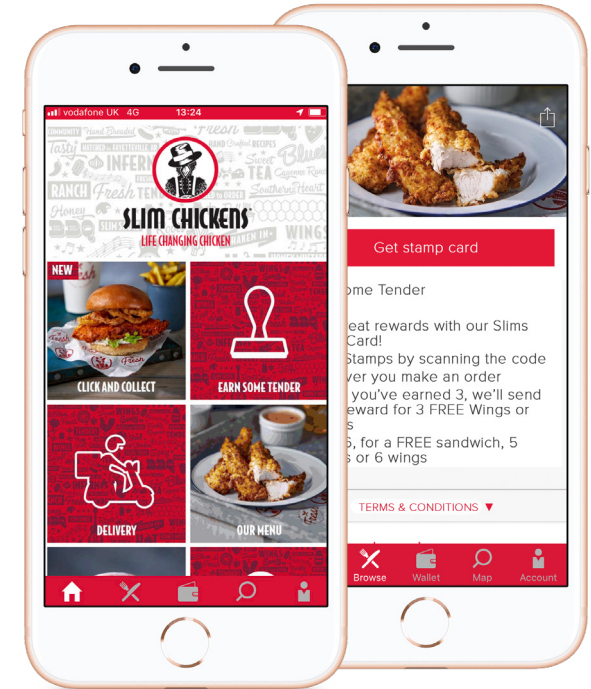
An operator or brand can also use digital to demonstrate added value or use promotions and

rewards, for example, to mitigate any impact of raising prices and drive trade at quieter parts of the day. A further 42% said they were more likely to choose a restaurant that offers promotions and/or a loyalty programme that offers rewards for continued custom after lockdown ends.

### Using digital to enhance business agility

The good news is that, although 34% said they would cook at home more than before the COVID-19 pandemic, the majority (47%) will return to what they preferred before lockdown. But consumer expectations of every F&B hospitality brand and operator has shifted. That includes pubs, bars and cafés; casual, fine dining and quick service restaurants, and food-to-go establishments.

With continued social distancing likely to restrict the numbers of customers that hospitality as well as retail operators can serve, and therefore the amount of revenue that can be generated from their physical spaces, generating loyalty by building not only trust, but also convenience, into the customer experience using digital will become even more important going forward. Those who have already benefited from digital ordering and promotional capabilities, should now look to extend these services to entice customers back and boost footfall.



Slim Chickens recently went live with an integration to Eagle Eye partner, Qikserve. Customers can now order food and drink using the QikServe functionality via a tile within the Eagle Eye mobile app to include in the transaction any loyalty, rewards, and promotions that are available to them.

# Notes

Eagle Eye Solutions Ltd and QikServe, conducted an online poll of 760 consumers, aged 18+ from across the UK during the last two weeks of May 2020. The research methodology and survey abides by the [Market Research Society Code of Conduct Guidelines](#).

## About Eagle Eye Solutions Group Plc

Eagle Eye is a leading SaaS technology company transforming marketing by creating digital connections that enable personalised performance marketing in real time through coupons, loyalty, apps, subscriptions and gift services.

Eagle Eye AIR enables the secure issuance and redemption of digital offers and rewards at scale, across multiple channels, enabling a single customer view. We create a network between merchants, brands and audiences to enable customer acquisition, interaction and retention at lower cost while driving marketing innovation.

The Company's current customer base comprises leading names in UK Grocery, Retail and Food & Beverage sectors, including Asda, Sainsbury's, Tesco, Waitrose and John Lewis & Partners, JD Sports, Greggs, Mitchells & Butlers, Pizza Express and in Canada, Loblaw's, Shoppers Drug Mart and Esso.

Eagle Eye is headquartered in Guildford, United Kingdom and has offices in Manchester, Toronto, Canada and Melbourne, Australia.

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## About QikServe

QikServe is the enterprise platform for guest self-service in hospitality. Using any channel from kiosks and tablets to web and mobile apps, hospitality operators can provide powerful in-store and off-premise solutions from ordering to payment, giving guests the convenience to order and pay for their food and drinks whenever and however they want.

In January 2020, QikServe acquired Preoday, the branded mobile application and online ordering technology provider.

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