

A Tale of Two Tables:

The Future of At-Home Hospitality

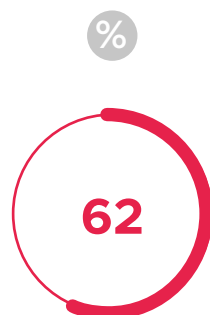
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The Future of At-Home Hospitality...



want the restaurant brand they've had at home to **continue delivering** after lockdown restrictions end



want their favourite restaurant brands to start selling **'cook or finish-at-home'** meal boxes nationwide

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Introductions



During lockdown, many hospitality businesses had to adopt innovative new ways to bring their brand experience and offering into their guests' homes.

The 'at home hospitality' phenomenon, covering everything from menu boxes to takeaway meals, emerged as a trend but has really proven itself to be a sustainable revenue and brand builder.

As venues reopen, one of the big question being asked is, **will consumer appetite for delivery continue to grow?**

We're confident that after surveying a nationally representative group of

consumers, demand not only remains strong but overall awareness of the category shows huge potential post-pandemic.

This report will highlight that potential and **the need for operators to really understand the value of serving their customers at two tables; at venue and at home.** Embracing both online and offline sales as mutually beneficial and profitable is something that customers not only want but now expect.

Katie, KAM Media

kam-media.co.uk

Introductions



We teamed up with KAM Media on this survey because we wanted to provide tangible actions that you can implement based on their insights.

What we've learnt is that hospitality at home is here to stay: **89% of consumers want their favourite brands to continue offering online.** With this kind of demand, you should be selling online direct to your customers via your own website.

Selling direct online can also help you navigate reopening by combatting no shows, encouraging business during off-peak hours and creating additional revenue from assets you already have.

In hospitality, experience is everything. Now more than ever, you need your online offering to mirror your offline experience. You wouldn't rely on a middleman to handle your front-of-house service - the same should apply for online.

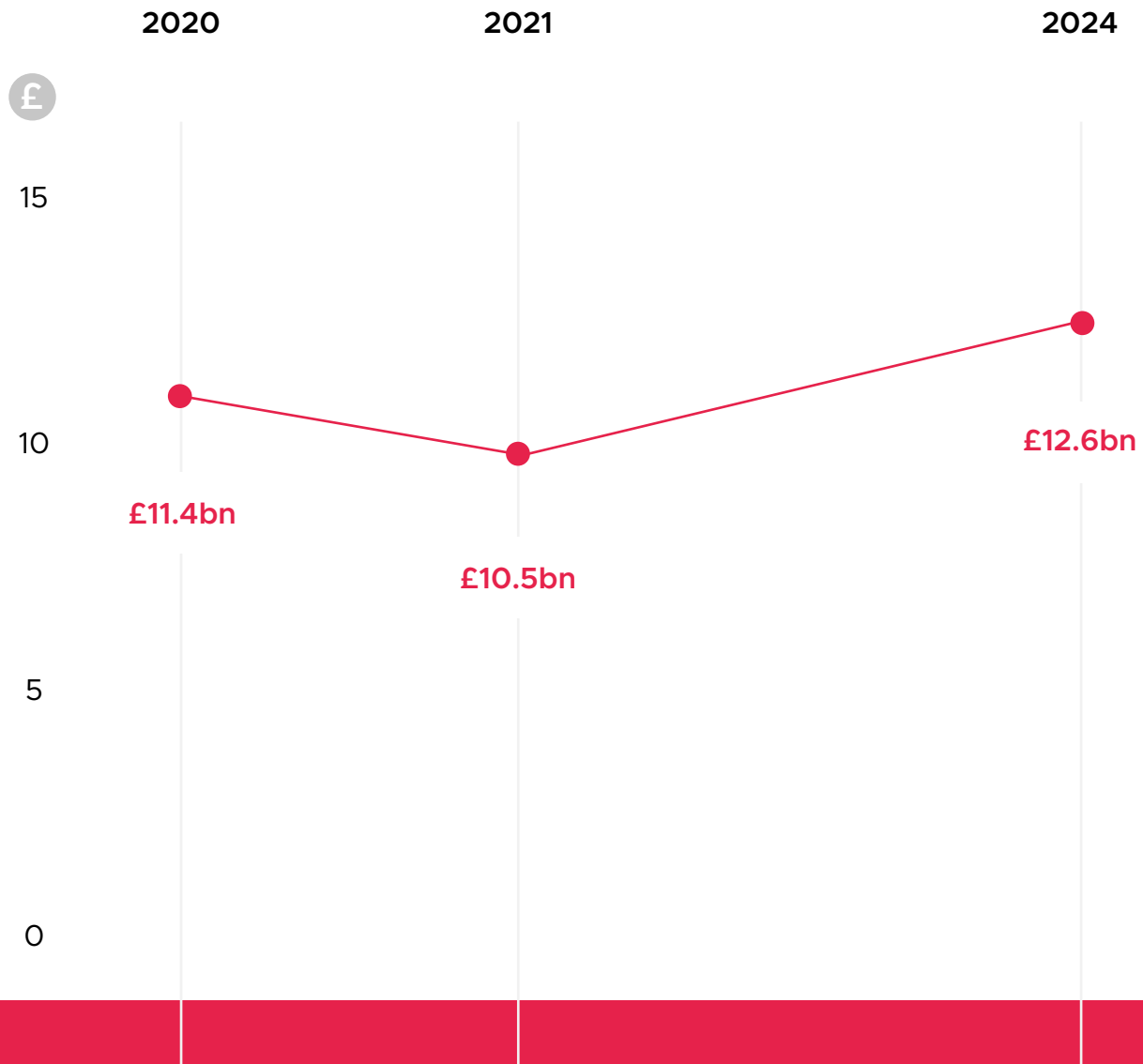
As we navigate the rest of 2021, **listen to what your customers want.** Being digitally-enabled significantly helps you achieve this. As challenging as this period has been, it's also an exciting time for the sector. If you embrace positive innovation, this survey shows there are huge opportunities to be had.

JP, Crosstown & Slerp Founder

slerp.com

MARKET POTENTIAL & GROWTH

Delivery market to hit £12.6bn



£2 for every £10
spent on foodservice
was accounted for by
delivery

4.3m UK adults
ordered delivery for
the very first time

Only 7.6% dip
as dine-in recoups
market share

At-home hospitality
shifts to the mainstream

“

At-home hospitality is definitely here to stay. Moving forward, the creativity that operators have exhibited by forging their online offering will be essential to stand out and drive opportunity. This is something very exciting and will be a pillar for our F&B strategy in the future.

SAVOY

CONSUMER DEMAND

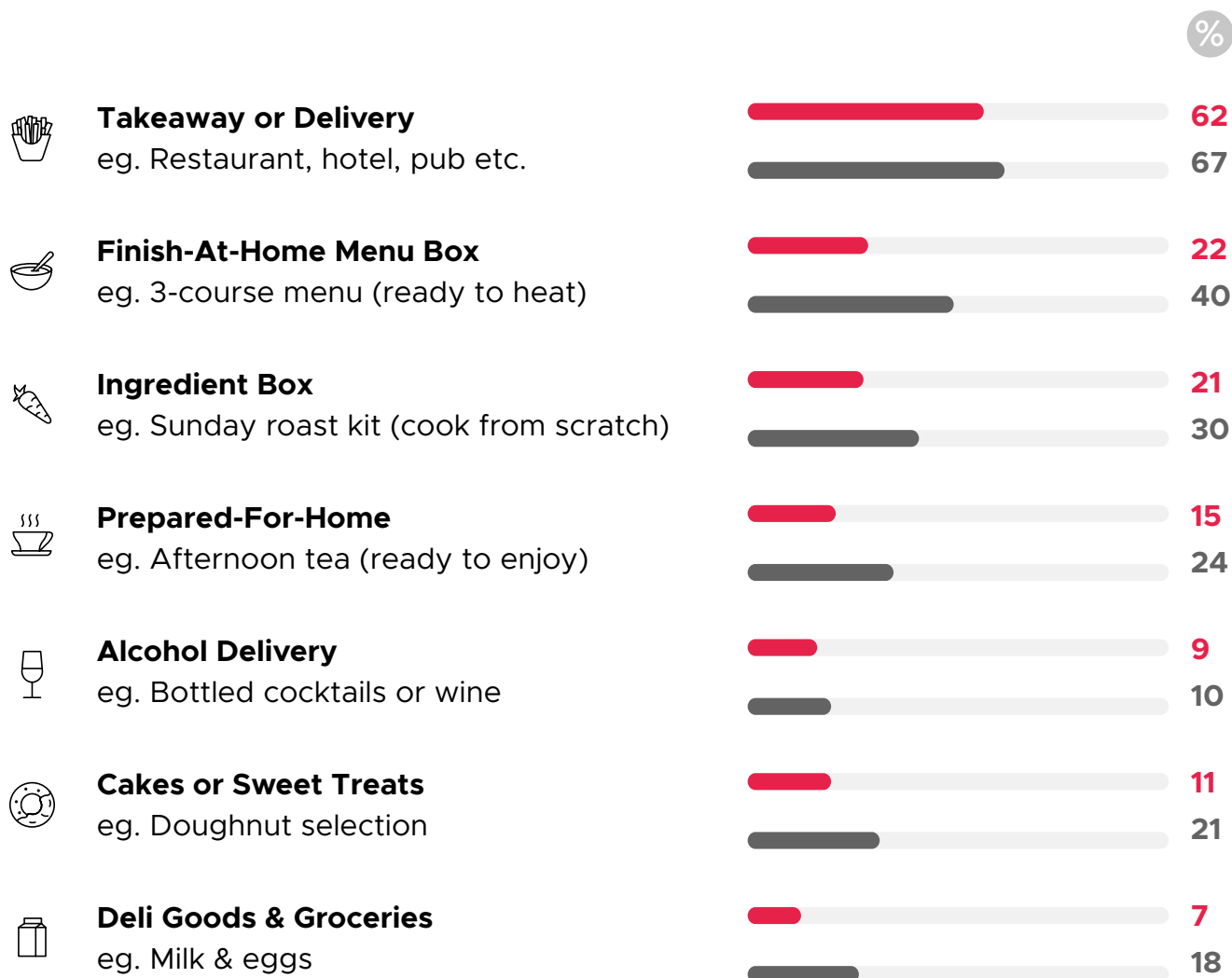
Past & future participation

● Consumer Participation

Has bought in last 12 months

● Future Participation

Would consider buying



Insight

The future consideration exceeding the current participation is a massive indication of demand.

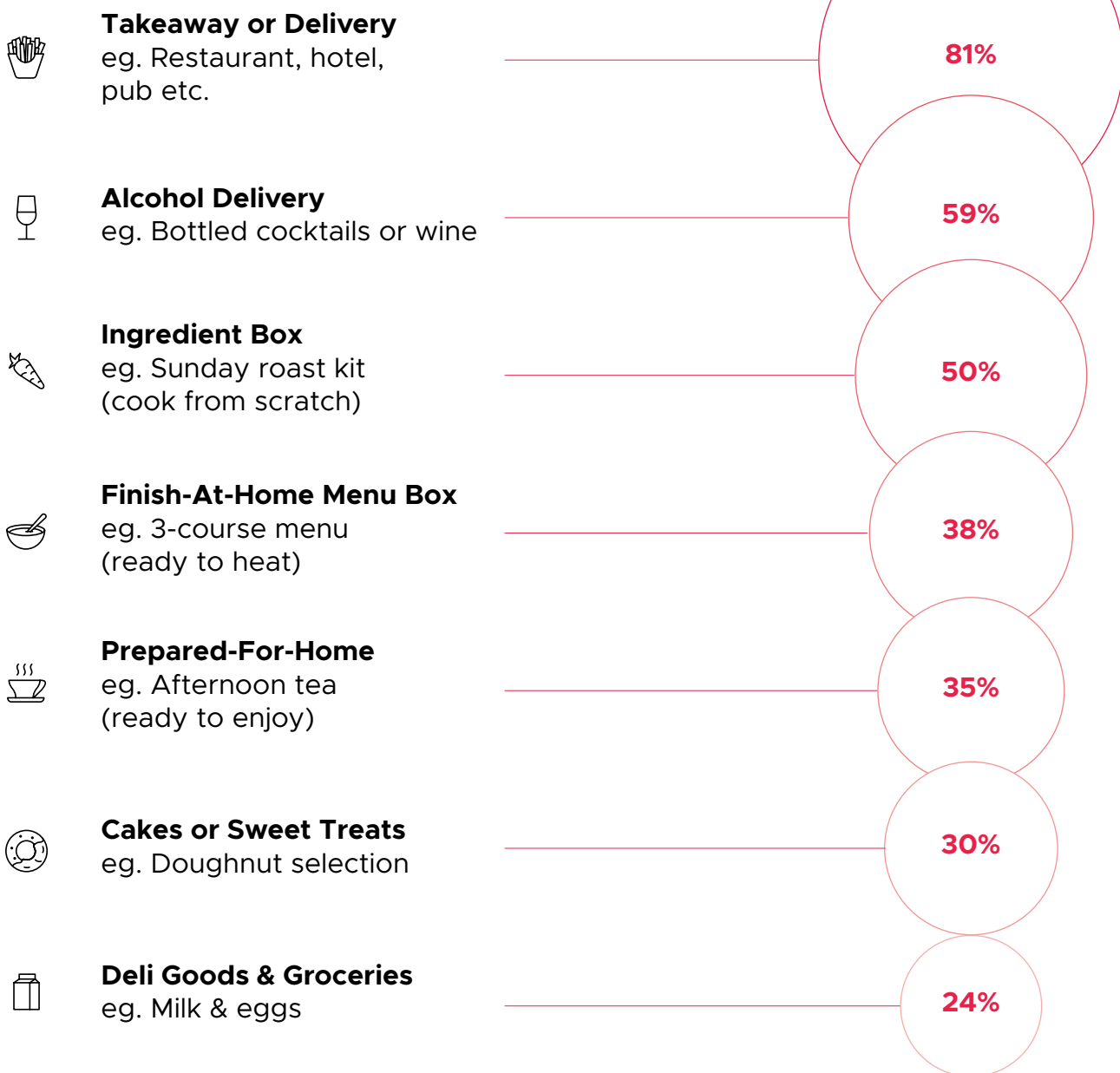


Actions

To capture this demand you need to offer a wide product mix under one roof and embrace nationwide delivery.

CONSUMER AWARENESS

Best-known at-home offerings



Insight

Current consumer awareness has reached mainstream levels, a huge leap considering very few brands were offering these services 12 months ago.



Actions

Invest in paid social ads to leverage awareness into sales. Ensure that your online store allows you to upsell and cross-promote your entire product range.

CONSUMER DEMOGRAPHICS

Generational targets for at-home hospitality

Aged 18 - 34



Takeaway or Delivery

eg. Restaurant, hotel, pub etc.



Finish-At-Home Menu Box

eg. 3-course menu (ready to heat)



Prepared-For-Home

eg. Afternoon tea (ready to enjoy)

Aged 35 - 54



Ingredient Box

eg. Sunday roast kit (cook from scratch)



Insight

Location and gender have much less impact on purchase probability. Under 35s like experiences while the 55+ want easy, bundled products.



Actions

Your online menu needs to be the ultimate reflection of your brand. Customers want to buy or cook your hero items. Don't distill - deepen your experience.

CONSUMER BEHAVIOR

At-home ordering lead times

● aged 18 - 34

● aged 35 - 54

● aged 55+



Takeaway or delivery

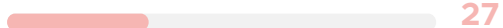


Same Day



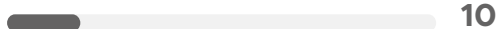
54

2-3 days before



27

A week before



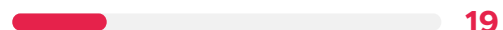
10



Menu box or recipe kit

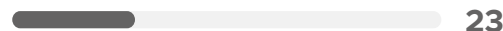


Same Day



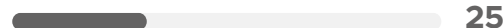
19

2-3 days before



23

A week before



25



Insight

Post-pandemic customers are increasingly ordering at-home experiences in advance as they plan their social gatherings more rigorously than before.

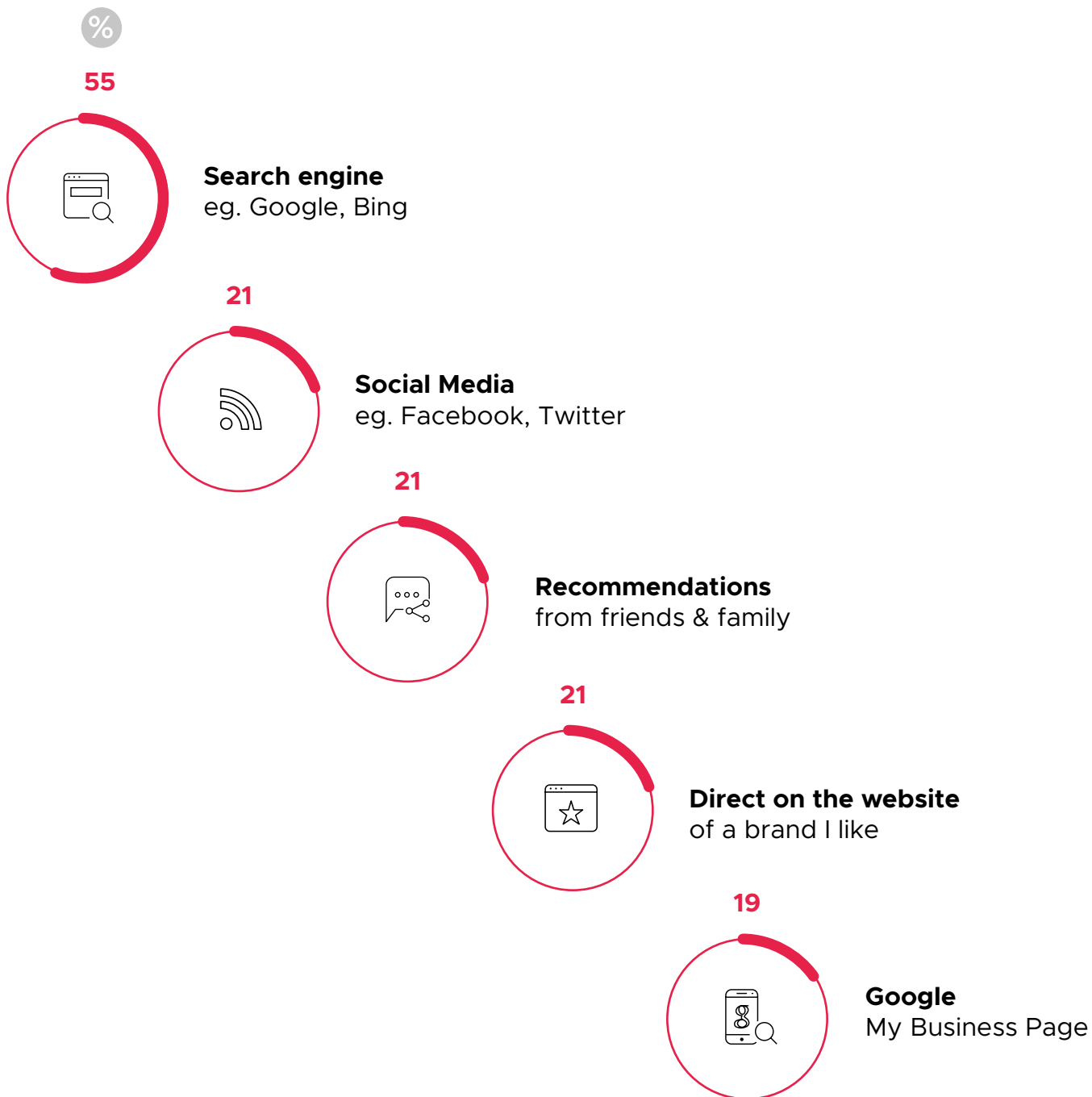


Actions

Ensure you've got the ability for your customers to pre-order. Pre-orders reduce waste, capture sales in advance and help you sweat your assets.

CONSUMER RESEARCH

Research methods for at-home experiences



Insight

Search is essential to your at-home discovery - you need to ensure marketplaces aren't leveraging your brand's search terms.



Actions

Add an 'order direct' button across all channels and leverage loyalty through a referrals scheme. Never direct customers to a marketplace on search.

“

The ability to bring a restaurant experience into people's homes is something we want to continue.

With Galvin At Home, we have had the opportunity to connect directly with thousands of guests in a way we could have never before dreamt possible.

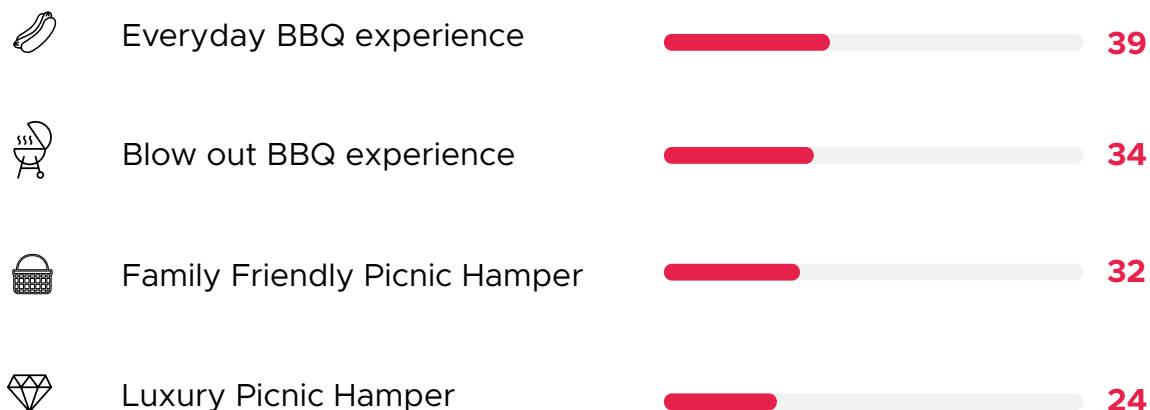
GALVIN

OUTDOOR ENTERTAINING

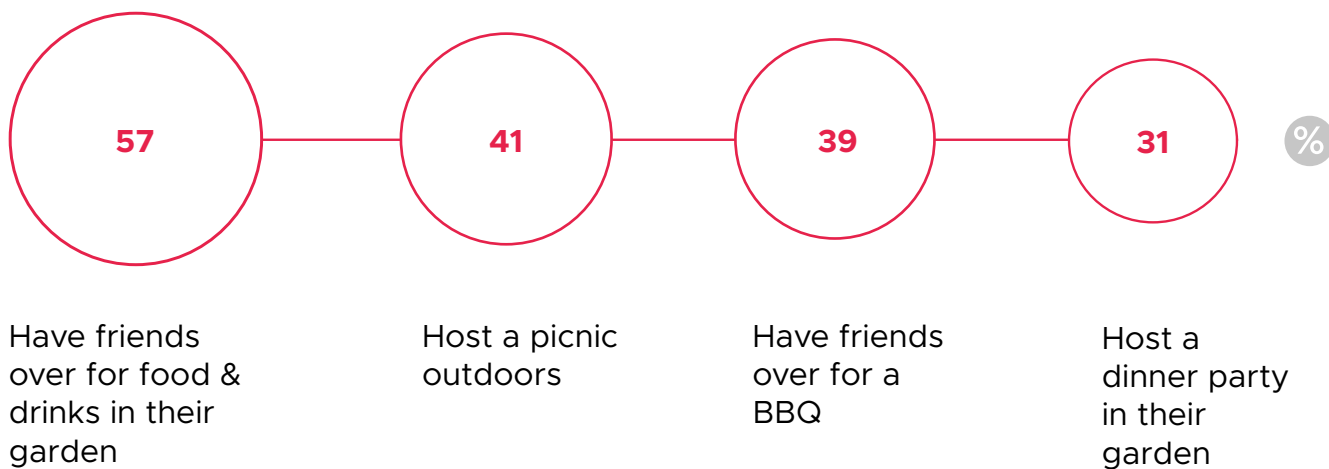
The future of at-home hospitality

What would people order for outdoor entertaining:

%



What socialising are UK adults intending to do outside over the next 12 months?



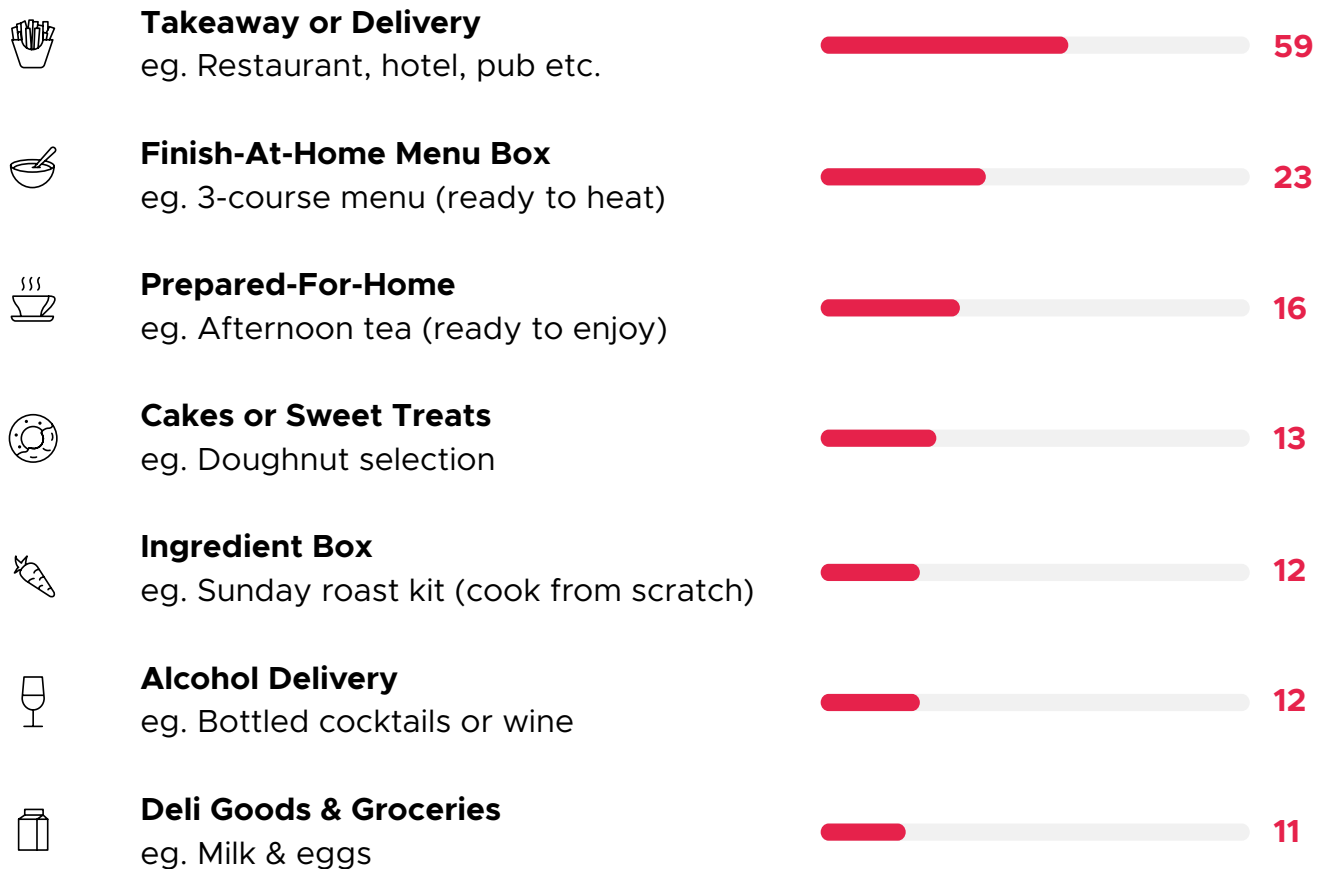
Insight
Our research shows that customers will opt to dine outdoors over indoors when dining at home as it's perceived safer.

Actions
Create a premium or upgraded version of existing packages and bundles you sell online to capture everyday, special events and gifting occasions.

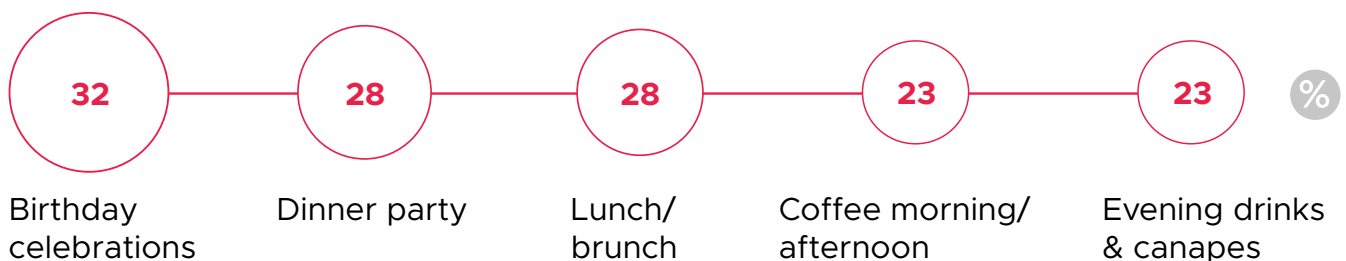
INDOOR ENTERTAINING

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% who would consider ordering for entertaining at home:



What socialising are UK adults intending to do inside their homes over the next 12 months?



Insight
Make it easy for guests to customise group size when purchasing. Consider dietary habits for your online menus.

Actions
Have an “always on” approach to celebration packages on your online store. It’s always someone’s birthday.

GROUP ENTERTAINING

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What would people buy for gatherings of 10+ people:

%



Food & Beverage Party Package

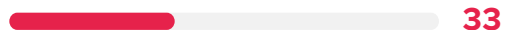


52



Takeaway or Delivery

eg Restaurant, hotel, pub etc.

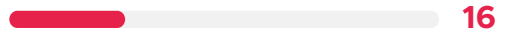


33



Finish-At-Home Menu Box

eg 3-course menu (ready to heat)

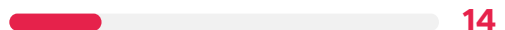


16



Prepared-For-Home

eg Afternoon Tea (ready to enjoy)



14

%

68

of UK adults will entertain **10+ people in their house** this year once allowed



Insight

2021 is going to be the year of socialising at home. There's massive consumer demand for highly-experiential, large group packages.

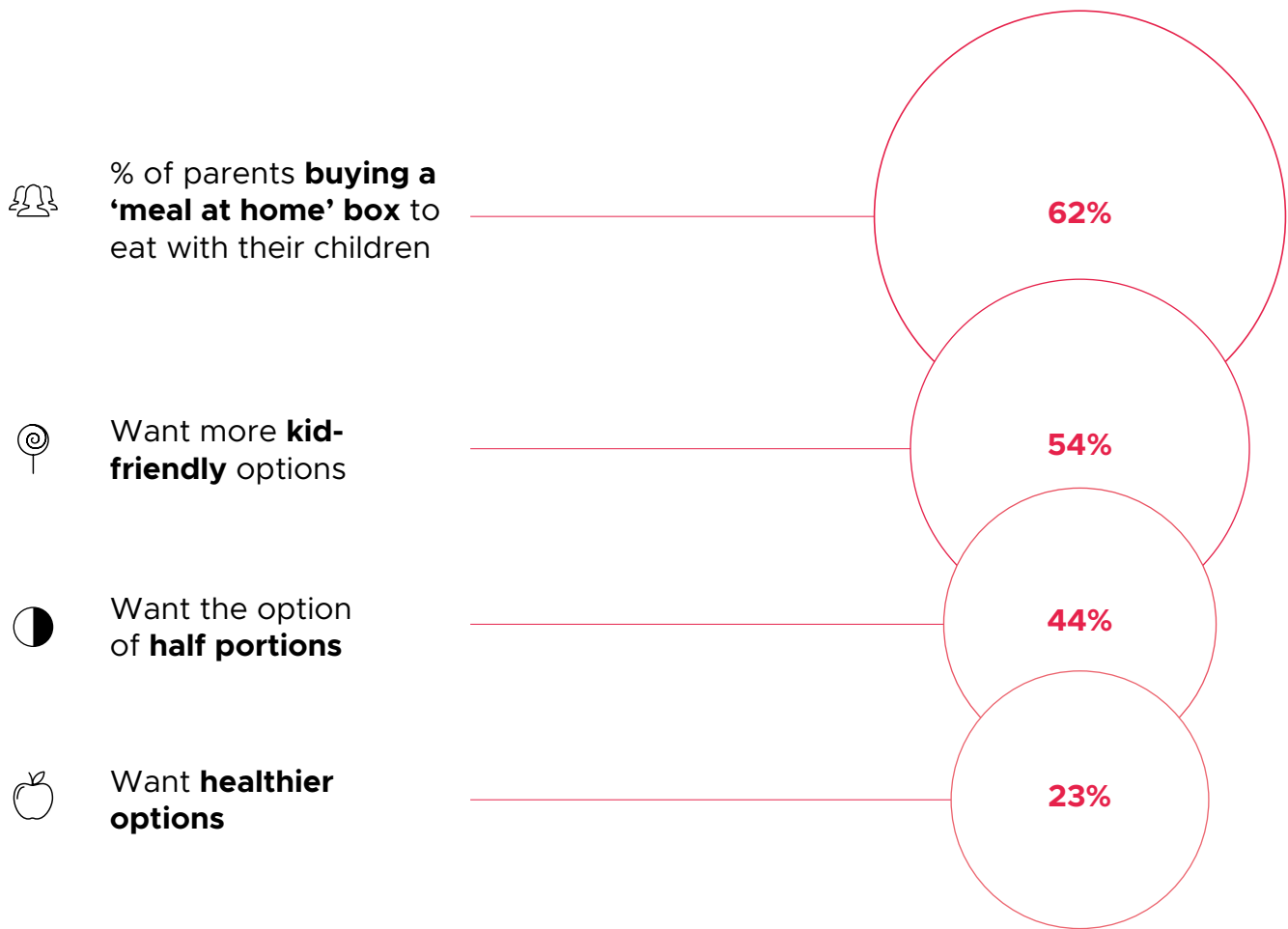


Actions

Focus on delivering more than just food and drink. Brands that add playlists, table decorations and other personal touches outsell their competition.

FAMILY DINING

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Insight

Include healthy kids options into your mix and remove barriers for parents.



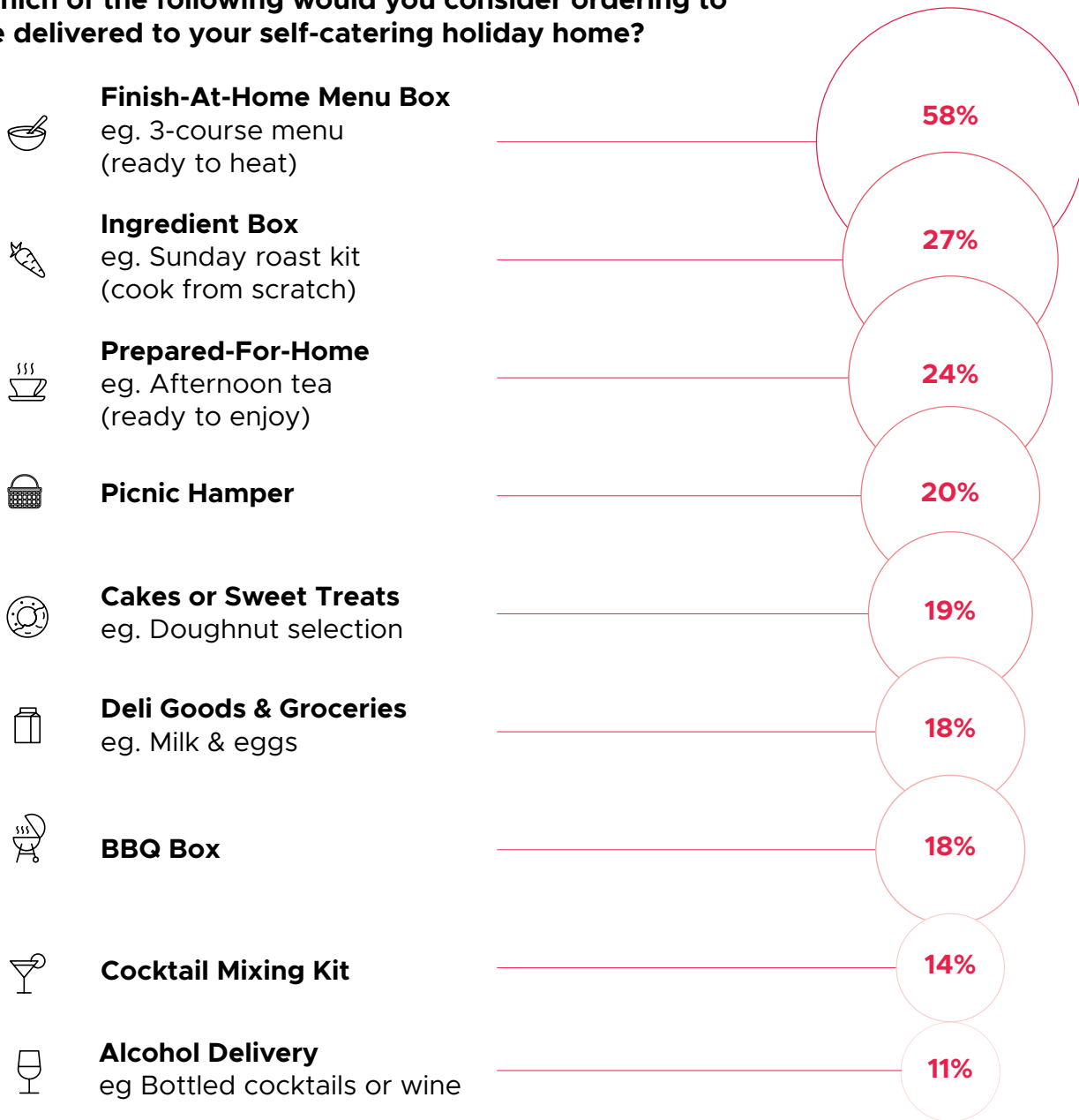
Actions

Operators who offer kids options typically have 25% less drop-off for seasonal events such as Easter.

STAYCATIONS

The future of at-home hospitality

Which of the following would you consider ordering to be delivered to your self-catering holiday home?



Insight

16.2 million adults intend to stay in self-catering accommodation on holiday in the next 12 months. The majority are wanting to order from brands they know and trust.

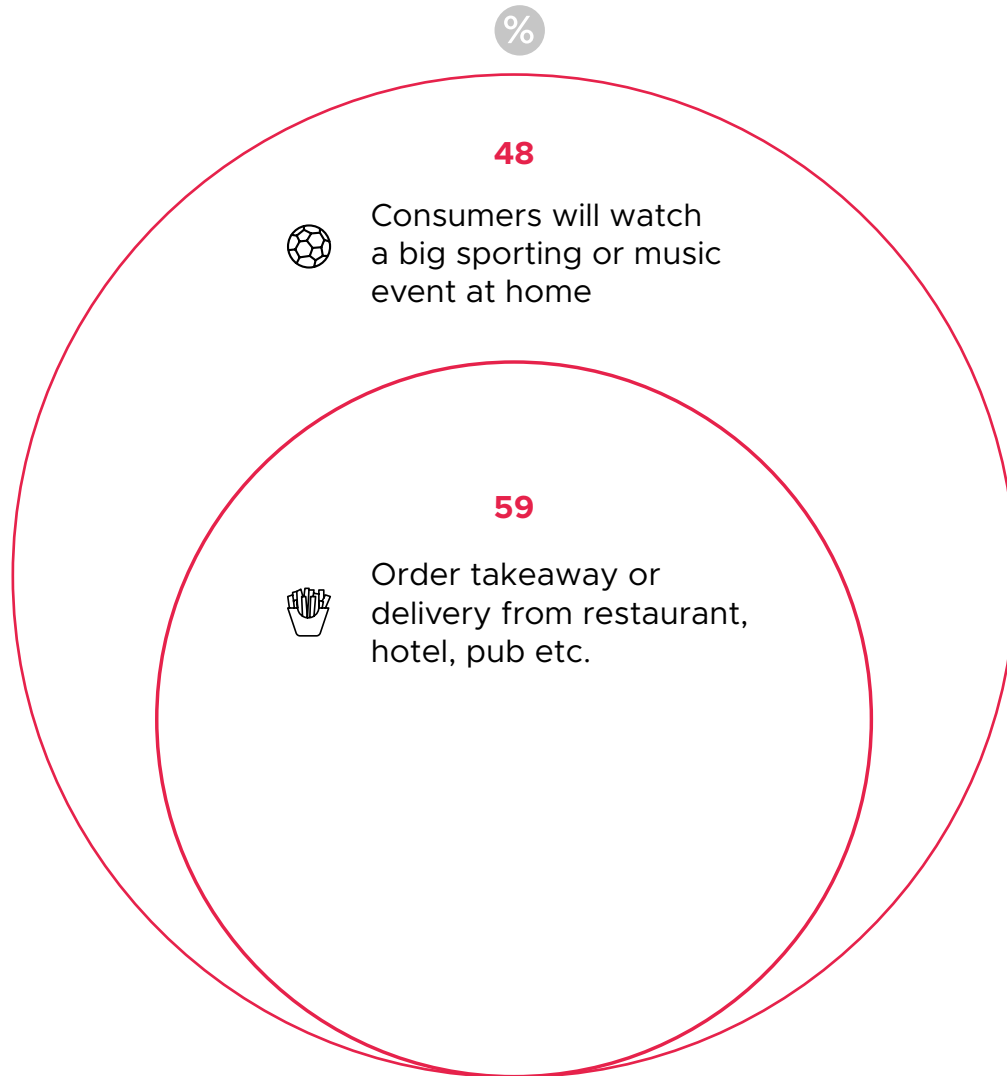


Actions

Create a 'first day arrival' offering with nationwide delivery. Start sorting your database by postcodes for marketing.

STREAMING EVENTS

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Insight

We're gearing up for a summer of socialising with consumers eager to host at home when they'd usually attend events or go out to watch.

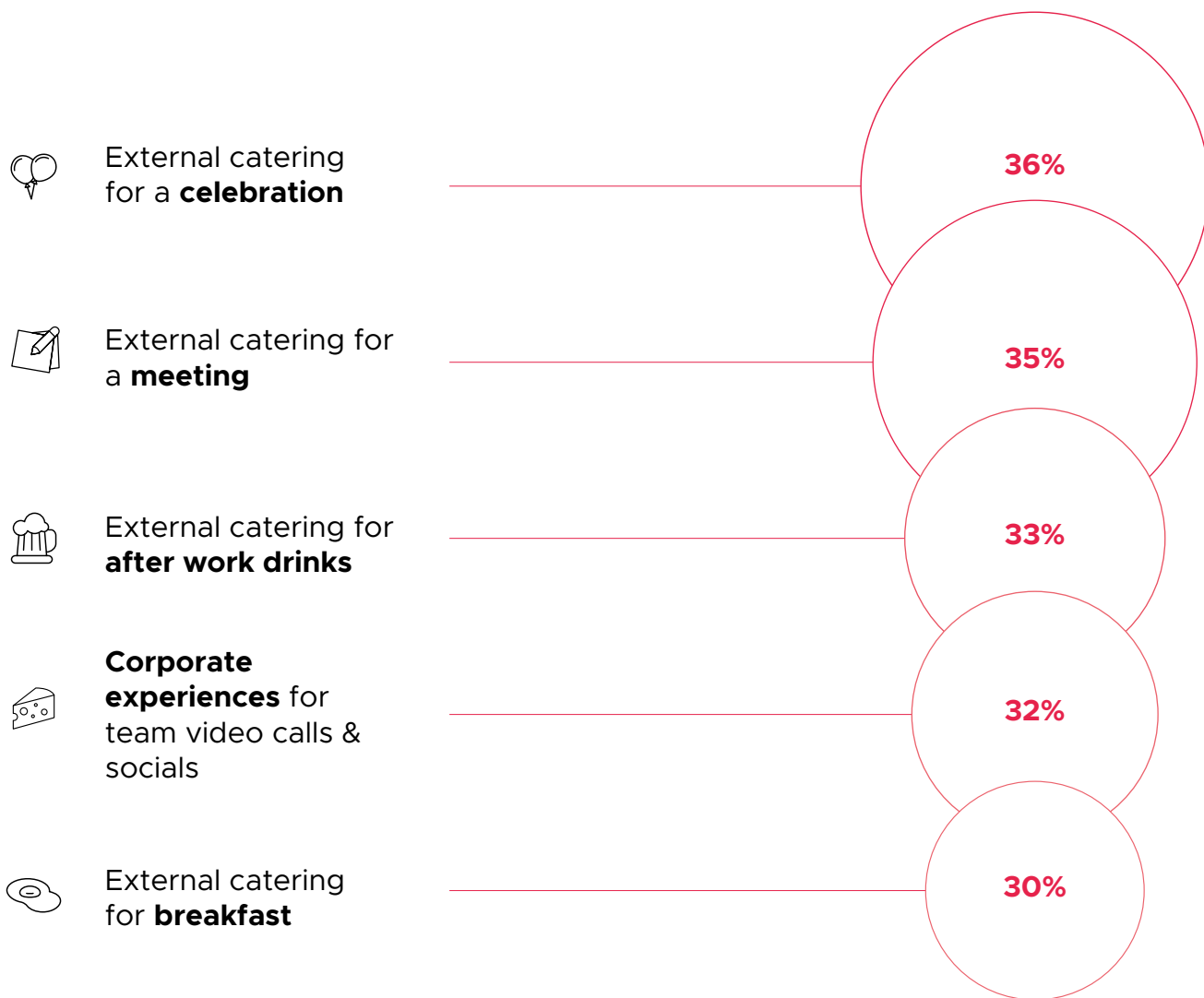


Actions

Create bespoke packages specifically around this summer's big events such as the Olympics or Euros. Promote a delivery menu for the big match nights.

CORPORATE ENTERTAINING

The future of at-home hospitality



Insight

There's a pre-existing trend for corporate catering but corporate gifting and remote socialising is an emerging trend to take advantage of.



Actions

Set-up an online store and offering for corporate clients and target PAs and Office Managers with a referral or points scheme.

GIFTING

The future of at-home hospitality



Insight

Millennials are leading the gifting of finish-at-home experience purchases while 55+ prefer to gift a product or hamper.



Actions

Offer a varied product mix to upsell and encourage increased basket spend. Don't overlook gift wrapping add-ons.

Want to know more? Get in touch



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The leading eCommerce solution for the hospitality industry made for operators by operators.

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