Fast casual restaurants can encourage consumers to trade up while trading down with local ingredients and versatile offerings that deliver added value.

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Fast Casual Restaurants – Germany – 2023

This report looks at the following areas:

- Market drivers specific to fast casual restaurants, including the impact of inflation and hybrid working models
- Participation in fast casual restaurants
- Factors influencing choice of restaurant, including food quality and affordability
- Interest in restaurant initiatives and innovations, such as loyalty programs and nutritional information on menus
- Interest in dishes at fast casual restaurants, such as German dishes and pizza
- Behaviours relating to eating in or ordering from restaurants, including the efficiency of digital menu ordering vs ordering from wait staff, willingness to spend on special occasions and taste perceptions of healthy menu items

38% of Germans visit fast casual restaurants*. 16-34 year-olds are the core market of this segment, likely linked to their higher prioritisation of quick service when choosing a restaurant.

Rising prices are putting a strain on spending. However, fast casual's more elevated experience when compared to fast food that is more affordable than full-service can allow brands to steal occasions from both. Conveying added value will be essential.

With good quality food as the main factor driving restaurant choice, fast casual operators can tap into freshness/made-from-scratch as value indicators. Increasing preparation and ingredient sourcing transparency, as well as championing localism can help.

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While indulgence tends to take priority, fast casual users drive demand for healthy and plant-based options. Fast casual can promote its versatility with highly customisable menus and by expanding features (e.g., portion size options).

The segment will also need to rise up to consumers’ increased expectations with dishes that align health with taste and more authentic recipes.

Despite tighter budgets, special occasions will motivate consumers to eat out. Brands can capitalise on the associated higher spending with an enhanced dining experience (i.e., fast casual 2.0) that includes not just the food but also the ambiance and hospitality.
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• Hone in on quality as consumers rethink value
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• Make the link between healthy and tasty
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- Consumer research methodology
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