

PLANET LUNCH BENCHMARK REPORT

June 2022



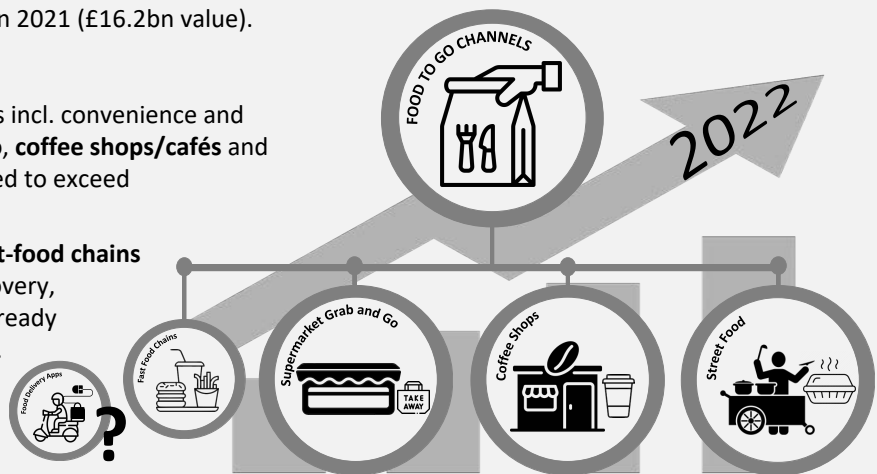
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INTRODUCTION

The Trends

- In January, when the *Working from Home Guidance* was lifted, millions of UK employees started heading back to offices, triggering an immediate increase in sandwich, salad and other food to go purchases.
- Research by Lumina Intelligence (March 2022) suggests that the UK food to go market is forecast to grow by +31.8% in 2022 to a value of £21.3bn; predicting to fully recover and exceed its 2019 pre-pandemic value, following a 38.2% growth in 2021 (£16.2bn value).
- More specifically...
 - key food to go channels incl. convenience and **supermarket grab & go**, **coffee shops/cafés** and **street food** are expected to exceed 2019 turnover, with
 - branded traditional **fast-food chains** seeing the slowest recovery, given **home delivery** already gained market traction.



The Challenge

- Despite January’s lifting of restrictions putting dining out and food to go back to the forefront of everyone’s minds, the cost-of-living crisis (resulting from post-pandemic return to work labour shortages, post-Brexit trading rules affecting UK imports from the EU and the war in Ukraine driving up food and fuel prices at what is touted the fastest on record) means everyone is looking for ways to make their money go further.
- With this in mind, TAF’s Benchmark Report “Planet Lunch”, June 2022, set out to establish:
 - (1) **WHAT** options UK consumers currently have when considering dining out and food to go for lunch,
 - (2) **WHICH** of the UK’s market leading companies/brands offer the biggest potential savings and
 - (3) **HOW** the top nine companies/brands* rank when it comes to consumer quality and taste.



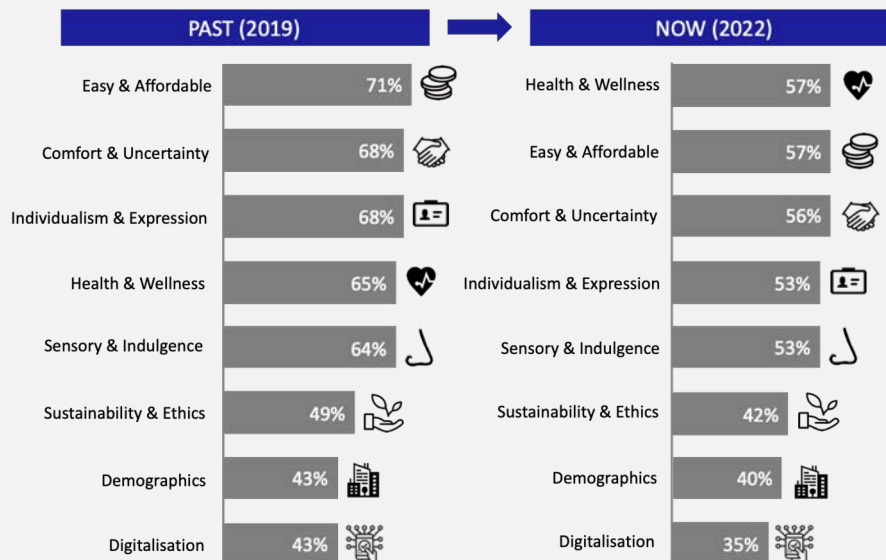
The Benchmark

- The TAF Catering Consultancy (“TAF”) today, working harder today, than ever before - to support corporate organisations with bespoke foodservice strategies to pivot in the aftermath of the pandemic in 2020/21 - have produced this Benchmark Report “Planet Lunch” in pursuit of providing two key insights:
 - **Part 1: Consumer Research** | Insights based on the latest market intelligence from Global Data, addressing the most relevant 2022 consumer megatrends/factors influencing food purchasing decisions.
 - **Part 2: Lunch Benchmark** | Insights based on TAF’s unique field research, conducted in February/March 2022, addressing how UK consumers are looking for ways to make their money go further.

*Based on MINTEL’s Attitudes Towards Lunch Out-Of-Home 2021.

PART 1 | CONSUMER RESEARCH

- The UK consumer landscape has changed significantly and permanently in the past 2 years, especially in light of more “hybrid” lifestyles, i.e. changes in the work life/family life balance.
- According to a December 2021 Survey by Global Data, consumers today:
 1. Are still concerned about visiting shops/stores, which impacts on how they shop (46%)
 2. Are continuing to work from home or doing so more frequently (55%)
 3. Are following a strict weekly/monthly budget purchasing for their household (53%)
 4. Are considering eight megatrends when making food & drink purchasing decisions (*see below*):

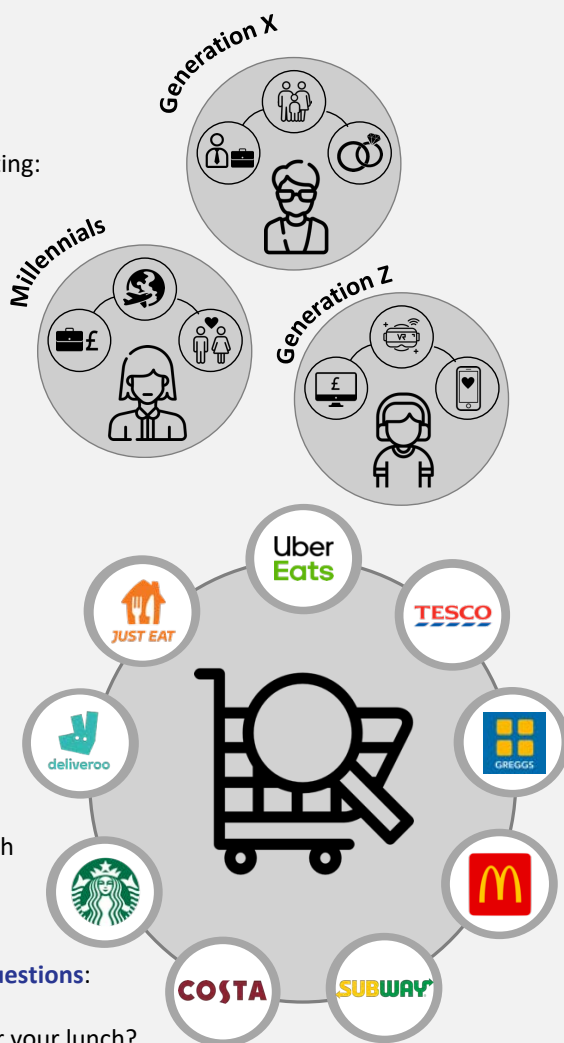


- Changed working practices, movement restrictions and focus on personal/public health have altered consumption and decision-making. Five factors are forecast to have a significant impact in 2022:
 1. **Hi-Lo Consumption Behaviour** | Consumers generally look for “easy & affordable” (with a higher focus on the latter) but when they look at treating themselves, they feel spending for a “premium experience” is justified (if there’s good value to be had).
 2. **Redefined Health & Wellness** | A shift to holistic welfare and a focus on the scientific benefits of food: alternative proteins, positive nutrition (ingredients added to diets to benefit wellness), salt and sugar intake reduction and a stronger focus on plant-based.
 3. **Digital Convenience** | An expanded digital convenience landscape, translates into increased e-commerce opportunities, new technologies (i.e. Q Commerce, on demand delivery) and more ways to access products/services (i.e. subscriptions).
 4. **Stocking Up/Planned Impulse** | Consumers are planning purchasing more carefully/efficiently, translating into increased all day snacking, more family meals and a change in daily food consumption patterns. Supply chains need to be improved to meet consumers new habits.
 5. **Sustainability/Circular Economy** | Sustainable product choices are now part of consumers’ DNA around F&B, the most pressing being single use plastic, food packaging reduction, carbon/water footprint and social policies (shaping decision-making around brand choice).

Source: *Category Winners & Losers in Food & Drink: Strategies for Brands to Survive & Thrive*. Global Data, Feb 2022.

PART 2 | LUNCH BENCHMARK

1. **Objective** | To address how UK consumers are looking for ways to make their money go further.
2. **Aim** | To assess lunch as value-for-money/“Easy & Affordable” around food & drink purchasing decisions.
3. **Timeframe** | 6 weeks commencing February 2022.
4. **Day & Time** | Monday to Friday, 10am to 4pm.
5. **Researchers** | 3 researchers, roughly speaking, representing:
 1. Generation Z
 2. Millennials and
 3. Generation X
6. **Coverage** | 3 geographical areas, roughly speaking, in:
 1. the North (Durham),
 2. the South (London) and
 3. the East (Essex).
7. **Lunch Outlets** | 9 outlets were benchmarked:
 1. **3 Food Delivery Apps:**
Deliveroo, Just Eat & Uber Eats;
 2. **1 Supermarket Chain:**
Tesco;
 3. **3 Fast Food Chains:**
Greggs, McDonald’s & Subway;
 4. **2 Coffee Shop Chains:**
Costa Coffee & Starbucks.
8. **Parameters** | Researchers were given £10 to spend*:
 1. Complete a structured questionnaire for each lunch
 2. Take a photo of each lunch and
 3. Rank each lunch.
9. **Questionnaire** | Our structured questionnaire asked **5 questions**:
 1. **Venue Visited** | What venue did you visit today for your lunch?
 2. **Time of Visit** | What day and time did you buy your lunch?
 3. **Meal Description** | What items did you buy for lunch and how would you rate it for taste?
 4. **Easy & Affordable** | Do you consider your lunch value for money and what did it cost?
 5. **Repeat Purchase Potential** | Would you buy from this outlet again soon and why or why not?
10. **Rankings** | Outlets were scored 1 to 10.

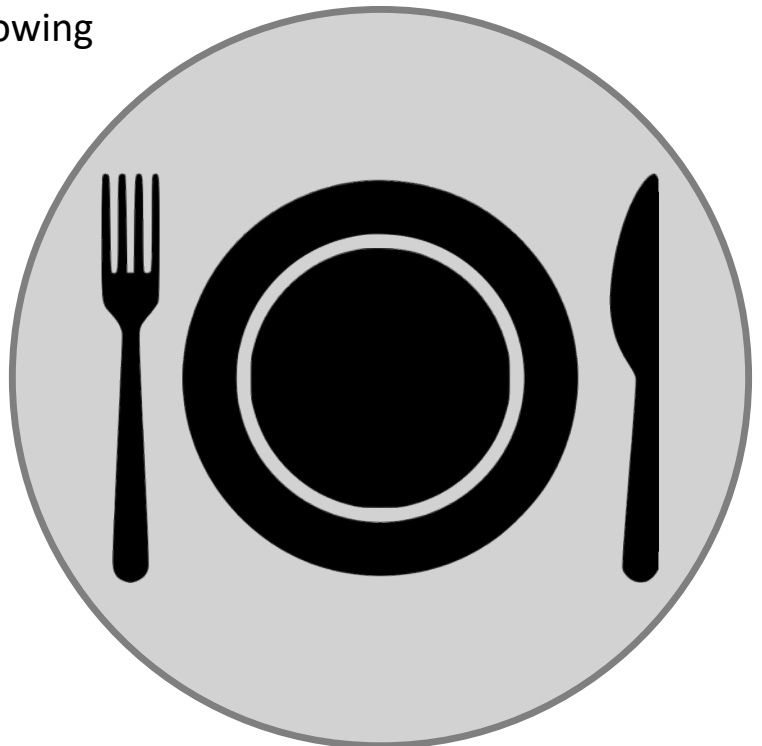


* £10 per day was the budgetary allowance for one lunch at 9 different locations (to be taken on different days).

BENCHMARK

Here we present our
“planet lunch” benchmark,
based on the results of TAF’s recent
field research around the following
9 outlets:

1. Costa
2. Deliveroo
3. Greggs
4. Just Eat
5. McDonalds
6. Starbucks
7. Subway
8. Tesco
9. Uber Eats





01 Costa



Overview

Researchers agreed that coffee variety & quality were satisfactory, but the food offer wasn't, especially around plant-based options. Whilst none of the researchers would return for lunch, Costa was perceived as offering an easy & affordable, filling meal.

AVERAGE RATING:

5.6

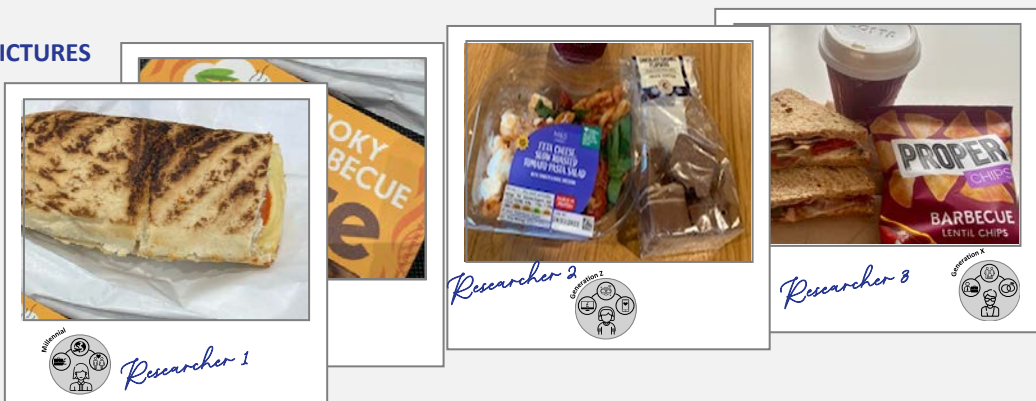
1. TIME OF VISIT | What day and time-of-day did you buy your lunch?

	Day	10-10.59am	11-11.59pm	12-12.59pm	1-1.59pm	2-2.59pm	3-3.59pm
Researcher 1	Monday			✓			
Researcher 2	Wednesday				✓		
Researcher 3	Friday	✓					

2. MEAL DESCRIPTION | What items did you buy for lunch and how would you rate them for taste?

	Name of Item	Plant-based	Excellent	Good	Poor	Very Poor
Researcher 1	1. Cheese and Tomato Panini	✓		✓		
	2. Graze Smoky BBQ Snack Box	✓		✓		
Researcher 2	1. M&S Feta Tomato Pasta Salad			✓		
	2. Chocolate Caramel Flapjack Bites		✓			
Researcher 3	1. BLT Sandwich (M&S)			✓		
	2. Proper Chips Barbecue			✓		
	3. Small Soya Latte			✓		

3. MEALS IN PICTURES



4. EASY AND AFFORDABLE | *Do you consider your lunch value for money and what did it cost?*

	Yes	No	Total cost of lunch
Researcher 1	✓		£4.46
Researcher 2	✓		£5.60 (plus £2.80 for a small latte, as meal below budget)
Researcher 3		✓	£7.45 (sandwich £3, crisps £1, coffee £3.45)

Average Meal Price: £5.84

5. REPEAT PURCHASE POTENTIAL | *Would you buy from this outlet again soon and why or why not?*

	Yes	No	Why/Why Not?
Researcher 1	✓		Although a limited range of toasted plant-based options, there was a good variety of snacks to go with the meal and it was good value for money. The food tasted as expected and service was quick, easy and efficient. Also convenient as several university buildings have Costas inside so I don't have to travel all the way into town.
Researcher 2		✓	I would definitely purchase a coffee from Costa again but unlikely to purchase food from there. The food was from M&S, and was actually cheaper in Costa's than in a M&S store. The salad was average tasting and small, nothing very inspiring about it. There was very limited choice of food in Costa, as the store had more cakes and treats rather than lunch time food. The flapjack bites were plentiful and soft and full of chocolate and caramel, there was enough to share with others!! I think the costs of the salad and flapjacks was actually good value for money, it was actually the coffee that made the lunch quite expensive. I think Costa is good for drinks and snacks but not very good at offering a lunch time meal. The queue was also quite long so not a good option if you're in a hurry, but there was plenty of seats to eat in.
Researcher 3		✓	Having skipped breakfast, I headed to the only Costa in my area (one of the first outlets I visited during the research), which is very small so I was not expecting a lot of lunch choices in the first place. The only chiller was not accessible by customers as it is covered by a glass window (following Covid). I was met with a very limited selection of M&S sandwiches – all on sliced bread - and none of them was vegan (3 meat & 2 fish), no pasta pots and no fruit, not even whole fruit in baskets (I was later told they had an issue with delivery). I usually do not eat sweets so I opted for my "usual" low salt crisps and topped up my lunch with a small coffee, as I do not drink fizzy drinks either. The BLT itself was ok, there was a thick layer of butter (which I am not too keen on), three slices of tomato and two salad leaves but enough bacon and a thin layer of mayo. Costa's coffee is something I usually do not go for, as I don't particularly like the quality of their dairy-free milks but the drink (at least) was well prepared. Disappointing visit overall, I will definitely not go back to Costa again for lunch (or anything else).

6. RATING (1 TO 10) | *How would you rate the retailer from 1 to 10?*

	Costa
Researcher 1	6
Researcher 2	7
Researcher 3	4

Rank Overall:

6



02 Deliveroo



AVERAGE RATING:

7

Overview

Researchers were mostly satisfied with the meal choices available. Two out of three agreed their lunch wasn't easy & affordable, based on portion size & taste. However, they all offered they would purchase from the same outlet again, but not via app.

1. TIME OF VISIT | What day and time-of-day did you buy your lunch?

	Day	10-10.59am	11-11.59pm	12-12.59pm	1-1.59pm	2-2.59pm	3-3.59pm
Researcher 1	Tuesday			✓			
Researcher 2	Tuesday			✓			
Researcher 3	Tuesday				✓		

2. MEAL DESCRIPTION | What items did you buy for lunch and how would you rate them for taste?

	Name of Item	Plant-based	Excellent	Good	Poor	Very Poor
Researcher 1	1. Sweet Potato Chili Burrito	✓	✓			
	2. Tortilla Chips + Salsa of Choice (Restaurant: Zap)			✓		
Researcher 2	1. Salmon Box (Restaurant: Yo! Sushi Kiosk)			✓		
Researcher 3	1. Duck Teryiaki (Restaurant: Osaka Ramen)		✓			

3. MEALS IN PICTURES

Researcher 1

Researcher 2

Researcher 3

4. EASY AND AFFORDABLE | *Do you consider your lunch value for money and what did it cost?*

	Yes	No	Total cost of lunch
Researcher 1		✓	£12.33 with delivery £10.80 without (large meal deal incl. a drink)
Researcher 2		✓	£8.20 (plus £3.68 service/delivery fee)
Researcher 3		✓	£9.70 (plus £2.48 delivery fee, with 50% promotional discount)

Average Meal Price: £9.56

5. REPEAT PURCHASE POTENTIAL | *Would you buy from this outlet again soon and why or why not?*

	Yes	No	Why/Why Not?
Researcher 1		✓	Despite the food being very nice and good value for money, for a quick lunch in a working day I would much rather visit the venue in person where the food can be prepared faster, delivery money can be saved, more options are available (and don't have to participate in meal deals). I can also access my student discount in person, which Deliveroo doesn't offer. In addition, it almost feels lazy ordering a takeaway for lunch (unless unwell), and I feel that takeaway is more of an evening treat than a lunch. Additionally, takeaway portions are often large, which can be too much for lunch. It can also be tricky to pick up if in the workplace and difficult to find somewhere to eat if not at home as it involves a lot of packaging.
Researcher 2		✓	The sushi was nice, but the box I chose didn't have much of a selection. The taste was good, it was nice and fresh but I have tasted better, I can't exactly explain why, but there was just something missing. It also didn't come with any sauce or onions which sushi normally does. Even though I'm aware that sushi is generally expensive, I think this item was overpriced for what you received. The charges from Deliveroo were high and it meant I went over the £10 budget but I couldn't purchase anything from Deliveroo which would come in under £10 including delivery. I found Deliveroo to be the most expensive generally for delivery and service charge fees. But they did offer to deliver from a good range of restaurants. I used the app to place my order and it was very simple to use.
Researcher 3		✓	I regularly use Deliveroo to buy pizza and Chinese from my favourite restaurants but never for lunch. I was very surprised/disappointed to find out that the majority of restaurants available were chains, especially poke bowl retailers (with meals well above the allocated £10 budget – how many times can you have a poke bowl before getting bored?). It's also very challenging to find energy-boosting, vegan meals on the App at an acceptable price point. I was looking for something different and came across <i>Osaka Ramen</i> , which I'd never tried before. The teriyaki duck was absolutely delicious, with the right ratio between rice, meat and veg. I could not really fault the meal (and service). The portion was quite big and did not finish it all, but at the same time there wasn't enough left for a second meal. Even though I really enjoyed the dish, I wouldn't have purchased it if it wasn't for the 50% discount on all menu items, as it would normally cost £19.40, which is way too much - the highest price I've ever come across for a take-away duck dish. This actually made me wonder if prices were inflated on purpose, to trick people into the "value for money trap".

6. RATING (1 TO 10) | *How would you rate the retailer from 1 to 10?*

	Deliveroo
Researcher 1	9
Researcher 2	4
Researcher 3	8

Rank Overall:

= 4



03 Greggs



Overview

Researches were not at all satisfied with the variety and quality of the lunch options on offer, as they were perceived as unhealthy. Whilst what they purchased was considered easy & affordable (at a very low price point), no researcher would go back again.

AVERAGE RATING:
4.6

1. TIME OF VISIT | What day and time-of-day did you buy your lunch?

	Day	10-10.59am	11-11.59pm	12-12.59pm	1-1.59pm	2-2.59pm	3-3.59pm
Researcher 1	Tuesday				✓		
Researcher 2	Wednesday				✓		
Researcher 3	Tuesday		✓				

2. MEAL DESCRIPTION | What items did you buy for lunch and how would you rate them for taste?

	Name of Item	Plant-based	Excellent	Good	Poor	Very Poor
Researcher 1	1. Vegan Sausage Roll	✓		✓		
	2. Margherita Pizza Slice	✓			✓	
	3. Chocolate Star Biscuit				✓	
Researcher 2	1. Feta & Tomato Pasta		✓			
	2. Mixed Grapes			✓		
	3. Thai Sweet Chilli Hand Cooked Crisps			✓		
Researcher 3	1. Mexican Chicken Wrap			✓		
	2. Vegan Sausage Roll				✓	

3. MEALS IN PICTURES

Researcher 1

Researcher 2

Researcher 3

4. EASY AND AFFORDABLE | *Do you consider your lunch value for money and what did it cost?*

	Yes	No	Total cost of lunch
Researcher 1		✓	£4.20
Researcher 2	✓		£4.95 (£5.09 with drink)
Researcher 3	✓		£3.90 (vegan sausage roll £1.05, Wrap £2.85)

Average Meal Price: £4.35

5. REPEAT PURCHASE POTENTIAL | *Would you buy from this outlet again soon and why or why not?*

	Yes	No	Why/Why Not?
Researcher 1		✓	Although very cheap, I would not buy from this outlet again for lunch. The vegan sausage roll was very tasty but more of a snack than a meal, and is on the unhealthy side so something I would not opt for often. The pizza was not worth the £2 and not very tasty and the biscuit was drier than expected. Without the sausage roll I would rate this a 2 or 3. Despite being the only Greggs in the UK with an upstairs seating area, its not the most pleasant place to dine in and often feels greasy; if I opt to go out for lunch, I'd like a nice area to enjoy it in.
Researcher 2		✓	Pasta was very tasty, and I liked the chunks of feta cheese. The portion was quite small, so I didn't stay full up for long, but it was good value for money for a portion that size. The grapes did not taste fresh, they were very small and did not have any flavour to them. I definitely wouldn't buy them again. There was nothing special about the crisps either. I wouldn't return to Greggs as food choice was very limited if you wanted to eat healthy. Small range of sandwiches and no plant based options. Staff weren't very friendly either. Greggs is good for unhealthy snacks like sausage rolls, donuts and pizza, but not somewhere I'd return to buy a proper healthy lunch.
Researcher 3		✓	I had never been to Greggs before and was very interested in finding out how their recent campaigns around balanced meals/healthier options would be marketed in store. The answer is they are not. The shop was quite small with no seating space, but a good selection of sandwiches. However, out of the 16 choices only one was vegetarian and not well presented at all (no vegan options either). I was originally planning to have a salad, which I could not, on account of them having dairy and mayo in them, so I opted for the healthiest looking meat sandwich. I must say the wrap was very good and the (little) lettuce and pepper salad in it tasted very fresh. I decided to purchase their famous vegan sausage roll as well but was bitterly disappointed, as it looked anaemic and the sausage inside did not look very appetising. Service was ok, even though not particularly speedy, despite only 3 customers queuing. I only spent a very small fraction of the £10 budget because I simply did not know what to buy. I would not go back to Greggs simply because their food offer does not fit in with my relatively healthy lifestyle.

6. RATING (1 TO 10) | *How would you rate the retailer from 1 to 10?*

	Greggs
Researcher 1	5
Researcher 2	6
Researcher 3	3

Rank Overall:

7



04 Just Eat



Overview

Researchers agreed their meals were great quality and tasted excellent, even if the restaurant choices on the app were limited. They also felt their meals were not easy & affordable so they wouldn't order via Just Eat again, due to the very high delivery fees.

AVERAGE RATING:

7.5

1. TIME OF VISIT | What day and time-of-day did you buy your lunch?

	Day	10-10.59am	11-11.59pm	12-12.59pm	1-1.59pm	2-2.59pm	3-3.59pm
Researcher 1	Friday				✓		
Researcher 2	Monday			✓			
Researcher 3	Tuesday			✓			

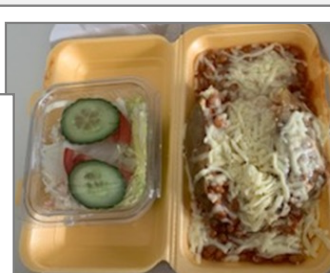
2. MEAL DESCRIPTION | What items did you buy for lunch and how would you rate them for taste?

	Name of Item	Plant-based	Excellent	Good	Poor	Very Poor
Researcher 1	1. Lentil Ragu Linguini (Restaurant: Zizzi)	✓	✓			
Researcher 2	1. Cheese & Beans Jacket Potato 2. Side salad (Restaurant: Ramos Cafe)		✓ ✓			
Researcher 3	1. Baked Sweet Potato Falafel with Bulgur Wheat, raw Broccoli and Cranberry Salad (Restaurant: Kitchn)	✓		✓		

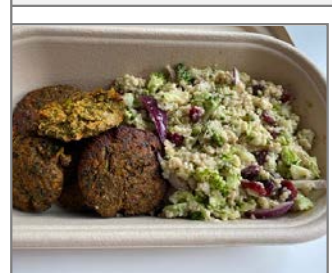
3. MEALS IN PICTURES



Researcher 1



Researcher 2



Researcher 3

4. EASY AND AFFORDABLE | *Do you consider your lunch value for money and what did it cost?*

	Yes	No	Total cost of lunch
Researcher 1		✓	£10.35 (20% promotional discount)
Researcher 2		✓	£6 (plus £4.00 service/delivery charge)
Researcher 3		✓	£10 (plus 1.49 service/delivery charge)

Average Meal Price: £8.78

5. REPEAT PURCHASE POTENTIAL | *Would you buy from this outlet again soon and why or why not?*

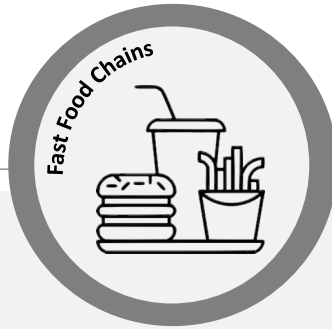
	Yes	No	Why/Why Not?
Researcher 1		✓	The Lentil Ragu was surprisingly delicious, and I was very happy with it despite the slightly expensive price for a pasta dish. However, I would not choose Just Eat again, unless Uber Eats and Deliveroo weren't available. It didn't represent a lot of the takeaways available in Durham and most outlets available on it appear to be places with lower ratings compared to the other two outlets. Upon initially trying to order with Just Eat (a couple of days prior) my order was accepted and then rejected, which is very frustrating after spending time on which restaurant to choose from. The only perks were the 20% off discount which made it more economically viable and the fast delivery.
Researcher 2		✓	This was the first time I ordered from Just Eat and there wasn't much choice of restaurants for lunchtime delivery. I ordered a jacket potato from a café called "Ramos" in the local village where you can get fried breakfast, snacks & dinner. Delivery was about 30 minutes and the food turned up nice and hot, with the cheese melted to perfection and plenty of it, which is a must for a jacket potato. The beans ratio was perfect too, not too little or too much. The potato was very large and soft. The separate side salad was simple (lettuce, cucumber, tomato & onion), but nice and fresh. I ordered online and it was easy to do, just a lack of choice and most restaurants had a minimum order. Delivery cost was high, but if you were ordering for a group then it would be more acceptable. I would use Just Eat again and definitely order from Ramos but I am more likely to order directly from them as they don't charge for local deliveries.
Researcher 3		✓	I order regularly from Just Eat, but only for dinner and buy more expensive food (usually to feed two). The meal was prepared fairly quickly from when I placed the order (20 minutes) but it was then with the delivery driver for 25, as he could not find the entrance to my apartment block and I had to go downstairs. This is very common, living in a cul-de-sac, but only with Just Eat drivers. For this reason, the hot falafel were stone cold by the time they arrived. However, they were clearly homemade and very tasty (slightly bitter because of the greens in them). The bulgur wheat was absolutely delicious and lifted the whole meal. The portion was quite generous and I could not finish it all, especially because I needed to be alert, being a regular working day. Overall, I liked the meal and pricing is in line with other retailers in my area. However, I wouldn't order again as waiting for the delivery was quite stressful and didn't allow me to concentrate on work.

Rank Overall:

6. RATING (1 TO 10) | *How would you rate the retailer from 1 to 10?*

	Just Eat
Researcher 1	8
Researcher 2	8
Researcher 3	6.5

2



05 McDonald's



Overview

Researchers agreed that despite being a low-cost, fast-food chain, the food felt healthier and tasted fresher than expected. They all thought lunch was extremely easy & affordable and would happily purchase a meal from the outlet again.

AVERAGE RATING:

7

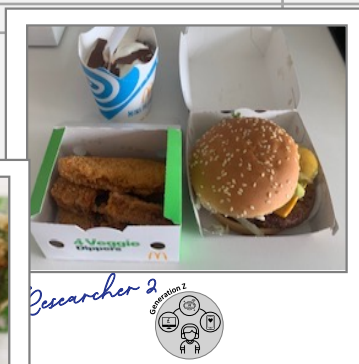
1. TIME OF VISIT | What day and time-of-day did you buy your lunch?

	Day	10-10.59am	11-11.59pm	12-12.59pm	1-1.59pm	2-2.59pm	3-3.59pm
Researcher 1	Thursday			✓			
Researcher 2	Tuesday				✓		
Researcher 3	Tuesday			✓			

2. MEAL DESCRIPTION | What items did you buy for lunch and how would you rate them for taste?

	Name of Item	Plant-based	Excellent	Good	Poor	Very Poor
Researcher 1	1. Vegetarian Spicy Wrap	✓		✓		
	2. Mozzarella Dippers	✓	✓			
	4. Smarties McFlurry			✓		
Researcher 2	5. Medium Fries	✓		✓		
	1. McPlant Burger	✓	✓			
	2. Mini Crème Egg Ice Cream		✓			
Researcher 3	3. Vegetable Dippers	✓		✓		
	1. McPlant Burger	✓	✓			
	2. Side Salad	✓		✓		

3. MEALS IN PICTURES



4. EASY AND AFFORDABLE | Do you consider your lunch value for money and what did it cost?

	Yes	No	Total cost of lunch
Researcher 1	✓		£6.17
Researcher 2	✓		£8.17 (burger £3.59, dippers £3.59, ice-cream 99p)
Researcher 3	✓		£5 (burger £3.59, side salad £1.09, plus £0.32 donation to charity)

Average Meal Price: £6.45

5. REPEAT PURCHASE POTENTIAL | Would you buy from this outlet again soon and why or why not?

	Yes	No	Why/Why Not?
Researcher 1	✓		As much as I dislike admitting it, since becoming a student I very much enjoy going to McDonald's. It is one of the only places I can get a plant-based starter, main and dessert for less than £6.50, and despite being fast food, it doesn't feel as unhealthy as I'd expect. Although the vegetarian wrap isn't very large, it tastes quite nice for what it is and has a good range of flavour in it. There is something strangely exciting about going with a group of friends, whether it's the drive through or dining in and service is always fairly fast.
Researcher 2	✓		This was my first time having a McPlant burger, you really couldn't tell it wasn't real meat. The lettuce was crispy, the burger was hot & had a good consistency, the cheese didn't actually melt but tasted good. There was also a lot of sauces in it, which made the burger sloppy but taste amazing. The McPlant was good value at £3.59. However, the veggie dippers were very average and tasted like something you could buy for £1 from Iceland, so these were definitely overpriced and you could taste that they had just been deep fried in oil. The ice-cream was delicious and good value at 99p. I also liked that it linked into the Easter celebrations. The restaurant was very busy and the ordering kiosks took orders but not payments, so you had to queue again to pay and then queue up somewhere else to collect the food. I had to wait quite some time for the food. I would definitely order a McPlant burger again but not the dippers.
Researcher 3		✓	I had not been to McDonald's for 12 years, so I wasn't sure what to expect in terms of food quality. I placed my order at the kiosks which was very easy and liked the fact that some of the meals were customisable, e.g. the side salad I purchased. The retailer does not really fit in with my lifestyle, so I struggled a little to pick a meal, especially as the vegetarian/vegan/low calorie options were limited. In terms of the meal, the McPlant tasted very good, thanks to the condiments, add-ons and sauces. I'd tried <i>Beyond Meat</i> burgers before so no surprise (I knew they taste good). The vegan cheese wasn't particularly appealing or tasty, but worked well with the rest of the ingredients. The side salad was really small, but I chose not to add any extras; it tasted and looked fresh. The outlet was very busy at the time of visit (all tables taken) and I waited c. 10 minutes to collect my order, which wasn't too bad. It was quite alarming for me to see so many mothers/families with young children (aged 2 to 5) having lunch there, as I'd probably choose other options for my children. However, I do appreciate this is a quick, simple and cheap option that may appeal to most. I must say I am tempted to go back and try something else.

Rank Overall:

6. RATING (1 TO 10) | How would you rate the retailer from 1 to 10?

	McDonald's
Researcher 1	7
Researcher 2	7
Researcher 3	7

=4



06 Starbucks

Overview

Researchers agreed that coffee was of outstanding quality, but lunch options were limited, mostly consisting of sandwiches. They felt meals were overpriced although acceptable quality and would rather visit for an afternoon baked treat with coffee rather than a meal.

AVERAGE RATING:

7.3

1. TIME OF VISIT | What day and time-of-day did you buy your lunch?

	Day	10-10.59am	11-11.59pm	12-12.59pm	1-1.59pm	2-2.59pm	3-3.59pm
Researcher 1	Wednesday					✓	
Researcher 2	Thursday			✓			
Researcher 3	Thursday						✓

2. MEAL DESCRIPTION | What items did you buy for lunch and how would you rate them for taste?

	Name of Item	Plant-based	Excellent	Good	Poor	Very Poor
Researcher 1	1. Chocolate Caramel Shortbread	✓		✓		
	2. Tomato & Mozzarella Panini	✓		✓		
Researcher 2	1. TuNAH Sandwich	✓	✓			
	2. Cookies & Cream Brownie		✓			
	3. Sweet Chilli & Sour Cream Crisps			✓		
Researcher 3	1. Five Cheeses Toastie				✓	
	2. Lemon Muffin			✓		

3. MEALS IN PICTURES



4. EASY AND AFFORDABLE | *Do you consider your lunch value for money and what did it cost?*

	Yes	No	Total cost of lunch
Researcher 1		✓	£6.20
Researcher 2	✓		£7.45 (£3.85 sandwich, £2.50 brownie, £1.10 crisps)
Researcher 3		✓	£6.64 (£4.45 sandwich, £2.19 muffin)

Average Meal Price: £6.76

5. REPEAT PURCHASE POTENTIAL | *Would you buy from this outlet again soon and why or why not?*

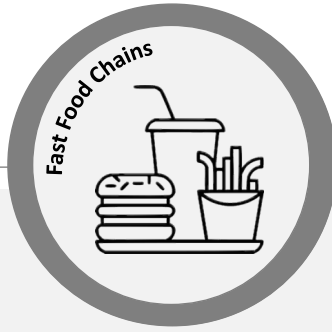
	Yes	No	Why/Why Not?
Researcher 1	✓		Starbucks shops are a nice venue to eat in, as they're quite open spaces, which is also convenient for bringing a laptop and staying to work with a bit of background noise after lunch. Although there isn't a huge range of food options, they are often well stocked and consistent, which makes lunch pretty easy. I am happy to pay a price that I believe is slightly overpriced due to this. It is also very easy to take away food if "on the go". However, half the appeal of dining at Starbucks is their wide-ranging drinks menu, I don't think I have ever been to a Starbucks and without purchasing a drink – the huge range changes the question you ask yourself from "do I want a drink?" to "which drink should I try today?". They also stock drinks that usual cafes don't, e.g. my personal favourite matcha latte. This is a very important factor to consider for this venue.
Researcher 2	✓		Despite a limited sandwich range, I love tuna so I decided to try the plant based one. Wow, what can I say it was amazing, it tasted like real tuna, the ratio of mayo was just right, the bread was lovely and soft. I would be more than happy to give up real tuna and just eat this instead. I can't wait to go back and purchase another one! The brownie was soft but crumbly, and although it was quite small in size it was very dense and filling, so if it was any bigger it would have been too much. The crisps were average, but you can't go wrong with crisps. I will be 100% going back and order food from Starbucks as the price was reasonable, given the very good quality of what I bought. The queue went down quickly, service was good and there were plenty of tables to sit at, which made my experience even more enjoyable.
Researcher 3		✓	I headed to my local Starbucks for a late lunch. The coffee shop doesn't have very much seating space so I ordered to take away. There were 7 sandwich types to choose from but none of them vegan, and only one with salad (lettuce, tomato). The vegetarian cheese sandwich I chose was not too bad overall, but there was hardly any cheese in it except for the top of the bread. The mustard sauce in it was very nice but that's all I could taste. I felt the sandwich was overpriced at £4.45, but I'd go back to Starbucks for lunch anyway, because I always know what to expect and because of the consistently good level of service I receive every time. I also loved their lemon muffin and think it's the best coffee chain muffin currently available on the market: very tangy, moist and of generous size.

6. RATING (1 TO 10) | *How would you rate the retailer from 1 to 10?*

	Starbucks
Researcher 1	7
Researcher 2	9
Researcher 3	6

Rank Overall:

3



07 Subway



Overview

Researchers had different experiences depending on location, possibly due to Subway being a franchise (i.e. inconsistent standards). Overall, lunch was of satisfactory quality, filling and therefore easy & affordable, so they would go back to try more options.

AVERAGE RATING:

6.5

1. TIME OF VISIT | What day and time-of-day did you buy your lunch?

	Day	10-10.59am	11-11.59pm	12-12.59pm	1-1.59pm	2-2.59pm	3-3.59pm
Researcher 1	Wednesday						✓
Researcher 2	Wednesday					✓	
Researcher 3	Friday		✓				

2. MEAL DESCRIPTION | What items did you buy for lunch and how would you rate them for taste?

	Name of Item	Plant-based	Excellent	Good	Poor	Very Poor
Researcher 1	1. Tastes Like Chicken Sub	✓			✓	
	2. Cookie	✓			✓	
Researcher 2	1. Meatless Meatball	✓	✓			
	2. Double Chocolate Cookie		✓			
	3. Coca Cola					
Researcher 3	1. Meatless Meatball Marinara	✓		✓		
	2. Chocolate Chip Cookie			✓		
	3. Quavers			✓		

3. MEALS IN PICTURES



4. EASY AND AFFORDABLE | *Do you consider your lunch value for money and what did it cost?*

	Yes	No	Total cost of lunch
Researcher 1	✓		£7.39 (part of a meal deal)
Researcher 2	✓		£6.29
Researcher 3	✓		£8.49 (small meal deal for 1)

Average Meal Price: £7.39

5. REPEAT PURCHASE POTENTIAL | *Would you buy from this outlet again soon and why or why not?*

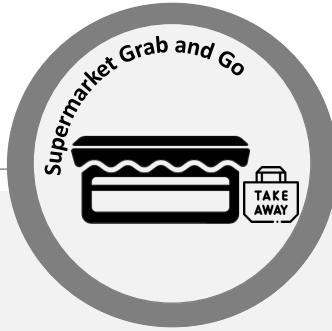
	Yes	No	Why/Why Not?
Researcher 1		✓	Although not too overpriced, if I want a sandwich for lunch its much cheaper to go to Tesco and buy a meal deal for half the price. The sandwich was filling although nothing special taste wise, this is the sort of food I would get after a night out and not for a daily lunch. Service felt slower than it should be, and despite advertising several plant based options on the menu, the only available option when I went in was the T.L.C. (tastes like chicken). This was my third time attempting to go to Subway for lunch since they often run out of all plant-based options. The shop felt quite greasy inside and when getting my lid off the drink included in the meal deal (which I had to pour myself), it didn't look like it was being stored in a particularly clean area. The only thing that would tempt me to go back for lunch in future would be to try their meatless meatball marinara sub, which I have tried once before and was value for money, but never available.
Researcher 2	✓		Service was really good, staff were very friendly and polite. This was the first time I had been to a Subway and the lady told me how it worked, I felt very comfortable asking questions. The meatless meat balls tasted so good. After my positive experience in Subway I went back and purchased the meat meatballs, and the meatless ones were much better than the meet ones, more flavourful. I had cheese in my roll but I could have done with more (I do like a lot of cheese). Cookie was very soft and the chocolate was gooey – in a good way. Just the right size, not too big to make you feel sick but big enough to satisfy you. The meal kept me full for a long time. I think it's good value and have since returned. I'll definitely return again.
Researcher 3	✓		I had not been to Subway since 2011, when I was charged £9 for a customised sandwich I didn't enjoy, so I was sceptical. My local branch is on a busy high street but I didn't have to wait long to be served, with 3 staff behind the counter. I was advised I could go for a lunch meal deal (not advertised in store) and opted for the small one. For the money paid, lunch was more than satisfying and included 2 retail items (Quavers and 7Up). The sandwich tasted very good, as I could add the veggies I like and avoid sauces, which I am not keen on. I also tried the vegan meatballs by themselves and they tasted a bit like cardboard, which I didn't notice before (there's surely better quality options available). However, the melted vegan cheese was one of the best I've ever tried. Bread was a bit dry and didn't taste very fresh, the sandwich was huge and could not finish it all. My Subway experience was good and I would definitely go back, but with friends next time so we can share the meal.

6. RATING (1 TO 10) | *How would you rate the retailer from 1 to 10?*

	Subway
Researcher 1	4.5
Researcher 2	8
Researcher 3	7

Rank Overall:

5



08 Tesco



Overview

Researchers were very happy with their meal choices and praised the variety of food-to-go options available. They felt their lunch was easy & affordable, but were not at all surprised, given it is a supermarket. They would all be happy to go back and buy lunch.

AVERAGE RATING:

7.6

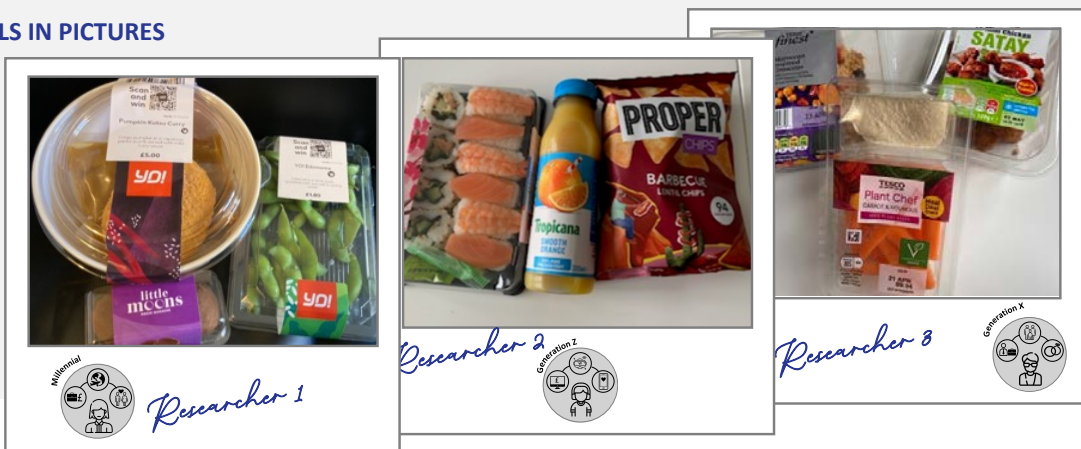
1. TIME OF VISIT | What day and time-of-day did you buy your lunch?

	Day	10-10.59am	11-11.59pm	12-12.59pm	1-1.59pm	2-2.59pm	3-3.59pm
Researcher 1	Friday					✓	
Researcher 2	Wednesday					✓	
Researcher 3	Thursday				✓		

2. MEAL DESCRIPTION | What items did you buy for lunch and how would you rate them for taste?

	Name of Item	Plant-based	Excellent	Good	Poor	Very Poor
Researcher 1	1. Pumpkin Katsu	✓		✓		
	2. Edamame Bean Pot	✓		✓		
	3. Little Moons Chocolate Mochi	✓	✓			
Researcher 2	1. Smoked Salmon & King Prawn Sushi			✓		
	2. Proper Chips, Barbecue Lentil Crips	✓		✓		
Researcher 3	1. Moroccan Inspired Cous Cous	✓		✓		
	2. Mini Chicken Satay Skewers			✓		
	3. Carrots & Hummus	✓		✓		

3. MEALS IN PICTURES



4. EASY AND AFFORDABLE | *Do you consider your lunch value for money and what did it cost?*

	Yes	No	Total cost of lunch
Researcher 1		✓	£9.30
Researcher 2	✓		£5.85 (£7.35 with drink)
Researcher 3	✓		£6.25 (chicken skewers £2.45, cous cous £2.45, carrot and hummus £1.00)

Average Meal Price: £7.13

5. REPEAT PURCHASE POTENTIAL | *Would you buy from this outlet again soon and why or why not?*

	Yes	No	Why/Why Not?
Researcher 1	✓		The food was good quality considering it was from a supermarket sushi counter. The Yo Sushi sushi was significantly better than the Tesco own brand sushi. Nice range, although a limited number of plant-based rolls. Nice to eat something a bit different for lunch as pumpkin katsu is not available in a lot of outlets. However, the meal did require a microwave so would only be ideal if this was accessible (not on the go).
Researcher 2	✓		The meal deal is really good value, sandwich or small sushi, plus snack and drink for £3.00. Lots of choice of different sandwiches and other combinations as part of a the meal deal. I would definitely buy a meal deal again, especially if I was unsure on what I fancied to eat due to the large choice. The sushi I brought was very large and not part of the meal deal, but if you wanted sushi you could buy a smaller pack as part of the deal. It tasted fresh and filled me up. Proper Chips were very crunchy and full of flavour so they are now my favourite. As the crisps are made from lentils, it seems like a healthier option to normal crisps. The only issue is the Tesco shop I visited was not within walking distance, but in the middle of nowhere. I also had to queue for over 5 minutes to pay, so not ideal if you are in a rush.
Researcher 3	✓		I had great expectations for my lunch when I went to Tesco: I thought I would have a lot of choice in a supermarket, as opposed to high street restaurants/cafes. Turns out choosing a satisfying lunch was tough. I looked at meal deals first, but there were no vegan sandwiches and all the pasta salads contained mayo, which I cannot have. For this reason, I decided to look around and "build my own". Again, not many plant-based options if not for plain premade salads, so it took me a good 10 minutes to make up my mind. I opted for chicken and cous cous and I must say they did deliver on flavour, making for a fresh, tasty meal. I am used to eating lots of vegetables, so I had to top up with carrots and hummus – which you cannot really go wrong with. Portions were generous so I ended up sharing with my partner. I personally wouldn't go back to Tesco for lunch; it's supermarket I turn to for occasional shopping top-ups, as it's very close to where I live but not my first choice. I'd rather go to my usual discount supermarkets which may have limited choice in terms of meal size (i.e. big portions), but always deliver on variety and freshness.

6. RATING (1 TO 10) | *How would you rate the retailer from 1 to 10?*

	Tesco
Researcher 1	7
Researcher 2	8
Researcher 3	8

Rank Overall:

1



09 Uber Eats



Overview

Researchers were overall satisfied with the restaurant options on the App but had quite different experiences depending on location. Two out of three felt their lunch was easy & affordable and all would order from the App again, if discounts were available.

AVERAGE RATING:

7

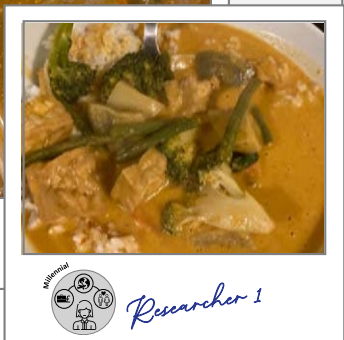
1. TIME OF VISIT | What day and time-of-day did you buy your lunch?

	Day	10-10.59am	11-11.59pm	12-12.59pm	1-1.59pm	2-2.59pm	3-3.59pm
Researcher 1	Thursday				✓		
Researcher 2	Wednesday						✓
Researcher 3	Thursday				✓		

2. MEAL DESCRIPTION | What items did you buy for lunch and how would you rate them for taste?

	Name of Item	Plant-based	Excellent	Good	Poor	Very Poor
Researcher 1	1. Red Thai Curry with Coconut Rice (Restaurant selected: Tuk Tuk, Asian)	✓		✓		
Researcher 2	1. Katsu Curry Bowl with Egg Noodles				✓	
Researcher 3	1. Cauli Willoughby (cauliflower, broccoli, hummus and house slaw)	✓				
	2. Proper Chips (lentil)	✓				

3. MEALS IN PICTURES



4. EASY AND AFFORDABLE | *Do you consider your lunch value for money and what did it cost?*

	Yes	No	Total cost of lunch
Researcher 1		✓	£8.10 (with 35% student discount)
Researcher 2		✓	£9.45 (plus £2.50 delivery fee)
Researcher 3	✓		£8.25 (plus £3.60 delivery fee)

Average Meal Price: £8.60

5. REPEAT PURCHASE POTENTIAL | *Would you buy from this outlet again soon and why or why not?*

	Yes	No	Why/Why Not?
Researcher 1	✓		Although I wouldn't often order in for lunch, Uber Eats often offer very good discounts making it more feasible and affordable, especially since you are also paying for £2.50 delivery. They offer a good range of outlets and although I prefer the branding and app design of Deliveroo, sometimes Uber has more options and is cheaper. The food from Tuk Tuk was very nice (although quite spicy for me), however the coconut milk came separate to the rick which was unusual. Delivery was very quick and food was in good condition upon arrival. Separate to the meal, due to the discount, I also purchased a matcha bubble tea, which was very enjoyable and quite filling. I wouldn't normally order this since it costs around £5 but due to the discount it was more affordable, making it cheaper to order this dish online than eat a similar dish in person.
Researcher 2	✓		You had a choice of rice or noodles with chicken and salad, I went for the noodles. The noodles were soft and tasted good but there was so few of them because of the massive amount of salad. There was only about 5 pieces of chicken and it was rather dry. The sauce went with the chicken and noodles but not really with the salad and adding the sauce made the salad soggy. Delivery time was good, and the delivery cost was acceptable, but the cost of the meal was very expensive for what I actually got. Uber Eats generally have lots of good offers, such as 50% off etc. but there is a minimum order amount of about £15 and the range of restaurants they deliver from is quite small, but this might be because I live outside of the main town. I would use Uber Eats again, especially when they have special offers on but I would not order from Woksta as it wasn't value for money or that nice.
Researcher 3	✓		Not too sure where to order from, given the lack of healthy alternatives in my area at lunchtime, I opted for a chain and ordered from Pure via the App (the shop is actually 20 minutes away by bus, so would not be able to get the meal myself). I must say I was pleasantly surprised by the overall freshness, quality and portion size (and the price was not extortionate). The highlight of the dish was the "Pure Slaw", traditional undressed coleslaw with the addition of pickled vegetables. The hummus tasted very fresh and homemade. The quinoa was well cooked but the same cannot be said for cauliflower and broccoli, which were undercooked for my liking. Overall, a very pleasant, light meal but the next time I'll be collecting it myself when in the area, as I was charged over £3 for delivery, bringing me slightly above the £10 budget.

Rank Overall:

6. RATING (1 TO 10) | *How would you rate the retailer from 1 to 10?*

	Uber Eats
Researcher 1	7.5
Researcher 2	6
Researcher 3	7.5

=4

CONCLUSION

TAF's unique "Planet Lunch" Benchmark Report, in February/March 2022, set out to address how UK consumers are looking to make their lunch money go further - across 3 demographic groups (Generation Z, Millennials and Generation X), 3 geographical areas (the North, the South and the East of England) and benchmarking 9 market-leading companies/brands - around what is "Easy & Affordable" (value for money). Our rankings are as follows:

1. **Tesco (7.6)** | Given it is a supermarket chain, lunch options were very satisfactory - especially around food-to-go. Meals were easy & affordable and of good quality, making Tesco the researchers' favourite location.
2. **Just Eat (7.5)** | Meals were good quality, even though the choice of restaurants available was limited. Each meal was easy & affordable, but no researcher would order again on Just Eat, due to the highest delivery fees.
3. **Starbucks (7.3)** | Coffee was of outstanding quality, but lunch options were limited & mostly sandwiches. Meals were overpriced but of acceptable quality. Ideal location for afternoon baked treats rather than a lunch.
4. **Deliveroo (7)** | Meal choices available were satisfying overall, although lunch wasn't perceived as easy & affordable, based on portion size/taste. Researchers agreed they would repurchase the meal, but not via app.
5. **McDonalds (7)** | Despite being a low-cost, fast-food chain, food felt healthier and tasted fresher than expected. Meals were extremely easy & affordable and all researchers would happily purchase another meal.
6. **Uber Eats (7)** | Restaurant options were satisfactory but customer experiences differed, based on location. Overall, lunches were easy & affordable and all researchers would re-order, if discounts were available.
7. **Subway (6.5)** | Experiences differed based on location, suggesting that as a franchise standards may be inconsistent. Meals were of satisfactory quality, filling and easy & affordable. All researchers would go back.
8. **Costa (5.6)** | Coffee quality was satisfactory, but the food offer was limited, especially vegan options. While none of the researchers would go back for lunch, meals were perceived as filling, easy & affordable.
9. **Greggs (4.6)** | Lunch variety & quality were not at all satisfactory and perceived as unhealthy but easy & affordable (at a very low price point). Greggs was the researchers' least favourite location.

3 Key Considerations can be drawn from TAF's Lunch Benchmark:

1 | Our findings corroborate consumer research re. "easy & affordable" when purchasing food /drink and a willingness to spend more for "premium" products/ experiences. Our researchers don't mind spending extra to dine in a welcoming venue with seating, good quality/choice of food to go and consistent high service, with easier choices.

1. Hi-Low Consumption Behaviour |

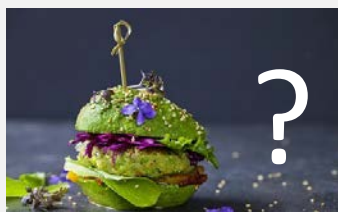
Customers of all ages opt for "easy & affordable" when purchasing food and drink and are willing to spend slightly more for "premium" products and experiences or to dine in.



2 | Our findings contradict market research, rating Easy/Affordable and Health/Wellness the same. Regardless of age, consumers prioritise affordability over health/wellness, our researchers commenting on how lunch tasted/ how filling, rather than how healthy (exc. Greggs was perceived unanimously "unhealthy").

2. Redefined Health & Wellness |

Regardless of age, consumers prioritised affordability over health & wellness, commenting more often on how their lunch tasted and how filling it was, rather than how healthy.



3 | Our findings suggest despite today's expanded digital convenience landscape and increased accessibility via digital tech, food delivery apps may have had their day in 2020-2021. Our researchers stating that, while they did enjoy the lunches they purchased on, they would not order directly with restaurants.

3. Digital Convenience |

Despite the digital landscape, food delivery apps may have had their day, consumers prefer ordering direct to combat high delivery fees, limited choice & poor customer service.





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