

CONECTA.



Eating & drinking out in Madrid

Providing the market research and research-based consulting services that today's companies and institutions need **is our vocation**

We've researched the catering industry to **identify the main trends**

HOW DID WE DO IT?



Scouting

Social listening on new trends in eating and drinking out (Instagram, Twitter, blogs...) and ethnographic observation visits by our team



Focus groups with consumers

Consumers looked in-depth at their uses and attitudes to the sector, consumption occasions and trends



Interviews with professionals

Managers of different types of premises reflected on their experiences and the changes in the sector and consumers

SIX KEYS FOR UNDERSTANDING HABITS AND TRENDS

**A NEW
CONNECTED
FOODIE
CONSUMER**

**A VERY
DYNAMIC
MARKET**

**COLLABORATIVE
PRESCRIPTION
AS THE NEW
BUSINESS MODEL**

**HUNGER FOR
NEW
EXPERIENCES**

**SOME
CHANGES IN
CONSUMPTION
HABITS**

A NEW CONNECTED FOODIE CONSUMER

The 'cult of food' based on pleasure and experimentation has taken root in young people

A consumer who's eager for new proposals, increasingly well-informed and "*gourmetized*"

Interested in showing others their experiences and projecting a trendy image of themselves

HUNGER FOR NEW EXPERIENCES

A context in which the consumer is constantly evaluating what's on offer, and where attention is paid to every detail in order to provide a differential experience

PRODUCTS WITH STORYTELLING



Stories that convey origin, the ingredients' distinctiveness, the recipe's originality...in order to **give the menu meaning and consistency**

IN LINE WITH THE CONSUMER'S CONCERNS AND PARTICULAR CHARACTERISTICS



The offer is beginning to echo increasingly frequent concerns in consumers (intolerances, allergens, sugar...) by introducing **alternative ingredients and updating its signage**

INNOVATIVE AND SURPRISING RECIPIENTS



New materials, shapes, decorations... that lend personality and strengthen the products' storytelling.
Products' presentation and aesthetics are coming to the fore.

WELL-CRAFTED AND ATMOSPHERED SPACES



Focusing on decoration in order to **recreate an atmosphere in line with the restaurant's philosophy and the predominant consumption occasion**

COLLABORATIVE PRESCRIPTION AS THE NEW BUSINESS MODEL

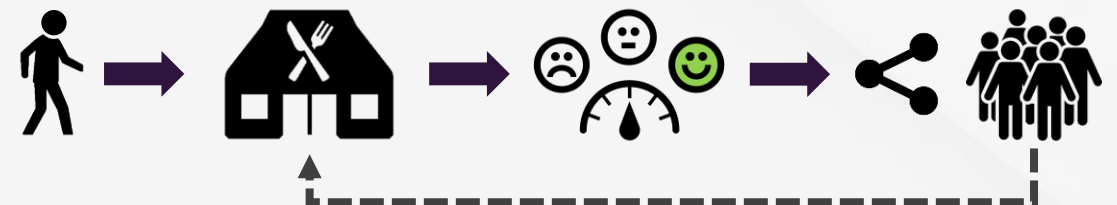
We've gone from a model where the heart of the business was about:

- Achieving consumer satisfaction...
- ...in order to ensure repeat consumption and loyalty



A model where success is based around:

- Generating a special, different and surprising experience...
- ...so that consumers share and recommend it to others



A VERY DYNAMIC MARKET

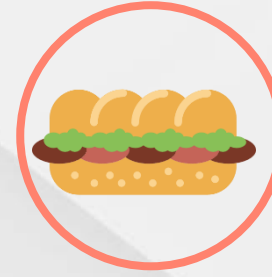
An offer that has proliferated and diversified intensely in recent years



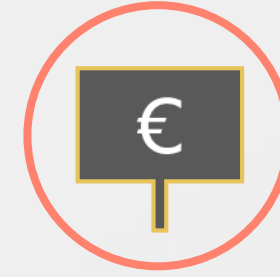
BY OCCASIONS



BY TARGET GROUPS



BY FOOD TYPES



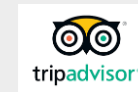
BY PRICE

A digital environment that has helped to popularise and publicise what's on offer

Social media are helping to promote **'the cult of food'** and to **set trends**



Catering and promotions apps have helped to make the **offer more accessible** through promotions and discounts



SOME CHANGES IN CONSUMPTION HABITS (I)

Following recovery from the crisis, **consumption has intensified** both in and out of home

Tradition is being enriched by international trends, generating a highly dynamic and active environment

Consumers who go out **a lot and who are expanding their range of consumption occasions**

People are going out earlier, the city is **opening up to daytime leisure more**, and consumption occasions are divided up more evenly during the day and week

SOME CHANGES IN CONSUMPTION HABITS (II)

A new moment that's firmly taking root in the afternoon (5-6 pm), particularly at weekends

'TARDEO'

Unwinding, having fun in moderation, experimenting with new proposals, displaying an attractive self-image



'Tardeo' (afternoon leisure) is often a continuation of after-lunch table talk and/or continues on into the party night.



A moment in which the lead player is the drink → They may start off with wine or beer and swiftly move on to a **'good, quality mixed drink'**.

A moment in which gin & tonic remains the leader, but which is forcing the spirits and soft drinks category to constantly update itself:

- **New varieties of flavoured gin** (pink gin) are catching on strongly.
- **Whisky and rum are looking for new mixers and cocktails** to help them gain greater presence in this consumption occasion (ginger ale, strawberry tonic, sodas, citrus drinks...)
- **The soft drink category is focusing on developing new line extensions** and its **premium** range.



SOME CHANGES IN CONSUMPTION HABITS (III)

Two classic consumption occasions with tradition in Madrid, which are reinventing themselves and adapting to the times

THE APERITIF

*Feeling the city's 'mood',
having something to drink,
spending time with friends*

A **tradition** in Spain at **midday on weekends** (12-1pm) that's gaining more and more devotees.

Vermouth and beer (accompanied by small portions of food that bars provide free-of-charge) **are this occasion's classics, and are currently being enriched by trends:**

- interest in **artisanal** is growing (homemade vermouth, craft beer...)
- and **international products** are bursting in (*Aperol Spritz*...)



*Socialising, drinking, eating
something, trying different things*

An **historically consolidated custom** in Spain. A leisure plan for the **early evening** (7-8 pm) consisting of '**going to bars**' to **drink beer, wine or soft drinks, accompanied by small portions of food** for individual consumption or for sharing. Tapas may be provided for free by the bar or bought at an affordable price.

The tapa's **size-price** is **perfect for trying new and different things**: they're looking for a variety, so they change the tapas in each round.

It's a really suitable concept for innovation, and which is **giving rise to new culinary proposals**:

- An **evolution on traditional tapas** (Basque 'pintxos', Andalusian tapas...) towards more **creative and experimental** cuisine
- Integrating elements from more **exotic and fashionable cuisines** (baozi, tacos, arepas...)

TAPAS



SOME CHANGES IN CONSUMPTION HABITS (IV)

Two of the city's high points are diversifying and becoming specialised

PARTY NIGHT

Having loads of fun, losing my inhibitions, gaining energy and confidence

The evening continues to be one of **Madrid's star moments**: a city that's always active, especially at the weekend.

Mixed drinks (rum & coke, gin & tonic, vodka & orange) **and shots are the evening's classics**. Amongst these, stronger drinks such as whisky and Jägermeister stand out, often combined with energy drinks (Red Bull, Burn).



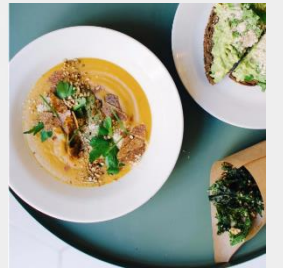
Savouring and tasting food, exploring different sensorial experiences, self-indulgence

The **accessibility and proliferation of the offer** that's taken place in recent years is **encouraging the people of Madrid to go out to restaurants and gastropubs**.

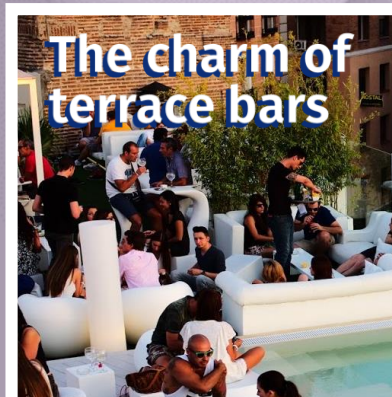
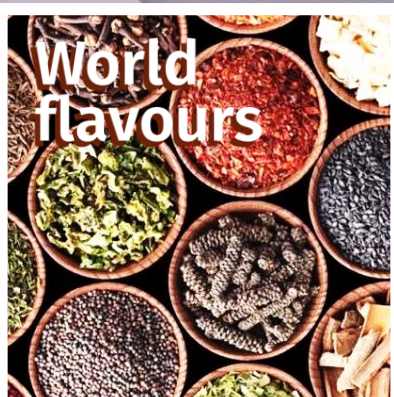
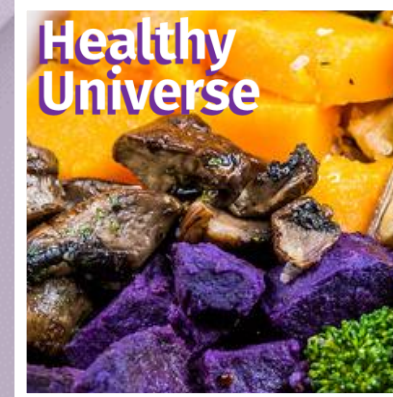
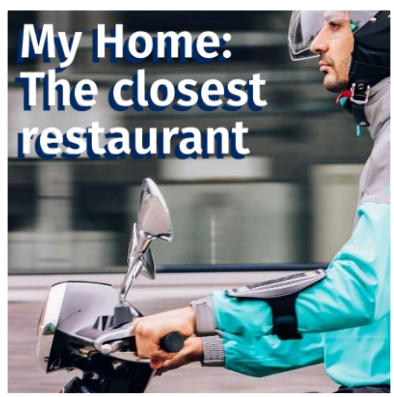
Food has the leading role, accompanied by soft drinks, wine/beer or water.

Specialization based on 'star products' is gaining more and more ground in the offer's segmentation.

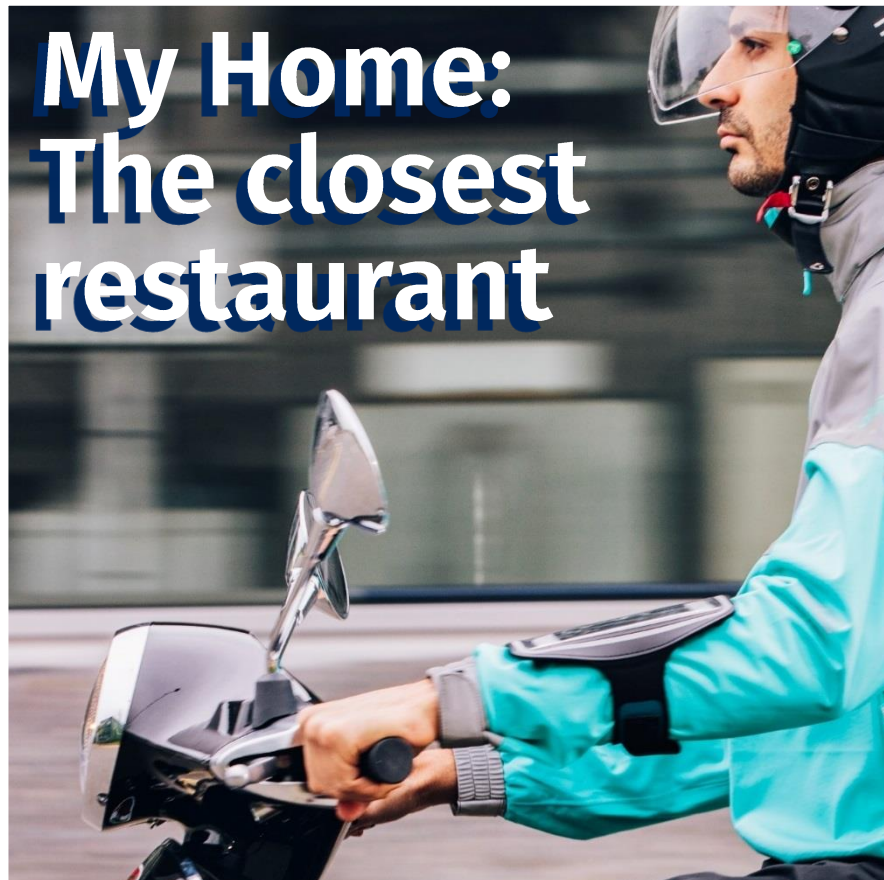
LUNCH AND DINNER



EATING AND DRINKING IN THE CITY: 12 TRENDS



My Home: The closest restaurant



"ENJOYING MY PRIVACY AND MY OWN SPACE"
"NOT DEVOTING TIME OR EFFORT"
"BREAKING WITH THE ROUTINE"
"SURPRISING MY GUESTS"

There's a tendency for consumers to spend more leisure time and socialize more at home. They're consumers who value their comfort and intimacy, but who don't want to give up food's pleasurable and experimental side.

This trend is giving rise to new online services that are allowing the *"restaurant at home"* to make an entry: apps for ordering takeaway food, homemade food delivery services, chefs and catering at home...

An offer that has diversified (by speciality, quality-price...) and that looks set to continue growing in the coming years.

JUST EAT

 **deliveroo**

wetaca 

**BENDITA
COCINA** 

CONECTA.

Markets



"LETTING THE VARIETY ENTICE YOU"
"RELISHING EXQUISITE INGREDIENTS OR EXCLUSIVE PRODUCE"

A concept that's arisen from the reconversion of old markets into gastronomic and leisure centres. Spaces that have retained their original structure, and which now house a wide variety of bars and diverse food stalls, with a communal area for eating. They often coexist with shops selling fresh produce, centring their offer on premium produce and high-quality ingredients.

Placing a wide and varied offer (pintxos, sushi, cheeses, sausages, cocktails...) within consumers' reach in the same space has been the key to their success.

A business model that manages to satisfy the new foodie's growing desire for experimenting *'here and now'*.

MERCADO
SAN ILDEFONSO
STREET FOOD MARKET

m
MERCADO
SAN ANTON
CHUECA

MER
CADO
SAN
FERNANDO

MERCADO
m
BARCELÓ

CONECTA.

From shop to table



"DISCOVERING THE WEALTH OF NUANCES THAT A SINGLE PRODUCT CAN OFFER"

"FINDING THE BEST PRODUCT IN THE CATEGORY"

"BECOMING MORE OF AN EXPERT"

Following in the wake of wine shops, some specialized stores are opening their doors to catering as an additional business. Butchers, ham shops, cheese shops, specialized grocery stores... that allow customers to taste their products on the premises and accompany them with drinks.

Their strength lies in the specialized offer and the opportunity to taste different varieties / nuances of the same product.

A concept that resonates with the new foodie's interest in becoming gourmets and more knowledgeable about gastronomy.





Round-the-clock restaurants

"CHOOSING A SAFE, VERSATILE OPTION"
"AN OFFER THAT FITS EACH MOMENT"

They're restaurants with non-stop kitchens, where customers can drink and eat at any time, and that manage to satisfy the needstates in different consumption occasions.

With a wide range of products, they provide coffee, brunches, market cuisine, cocktails, drinks...and an atmosphere that evolves from morning to evening.

An interesting alternative for a consumer who often doesn't have time to weigh up different options and who's looking for flexibility.

BOSCO
DE LOBOS

Viva Desde 1980
re's

Frida

Le COCÔ
- Resto Bar -

CONECTA.

Multi-experience spaces



"SAVOURING FOOD"

"FEELING"

"BUYING"

"COOLTURISING"

A concept that fuses fashion, decoration, design, photography, live music, cinema or literature with cocktails and market cuisine to offer the consumer a unique and differential experience.

Booming spaces that house shops, exhibitions, activities, bars and restaurants to respond to a consumer eager for surprises and diverse experiences.



SALA EQUIS

LA CENTRAL



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Healthy Universe



"EATING HEALTHILY WITHOUT LOSING FOOD'S PLEASURE"

"CARING FOR BODY AND MIND"

"FEELING GOOD"

"ACHIEVING BALANCE"

Organic, natural, healthy... are fused with creativity to provide a varied and tasty healthy eating offer.

A trend that has led to the proliferation of new restaurants and to the updating of menus in general, with a large number of restaurants already providing healthy options.

The development of this type of cuisine has emerged in response to growing consumer sensitivity to health, in many cases interlaced with ethical values and the sustainable economy.

 **faborit** *fresh bar*

honest greens®

PURE CUISINE
— Healthy Food —

HAPPY GREEN
— FRESH-N-FIT —

CONECTA

World flavours



***"DISCOVERING THE EXOTICISM OF WHAT'S AUTHENTIC"
"EXPLORING UNIQUE SENSATIONS"***

Ethnic cuisine continues to enrich itself, giving rise to an increasingly extensive and sophisticated eating offer.

From haute cuisine restaurants that fuse cuisines creatively (Japanese-Latin, Asian-Mediterranean...), to places specializing in iconic dishes (ramen, arepas, pupusas...) as well as a more general offer that's accessible to all (woks, grills...)

A trend with a wide range for consumers who like to constantly vary and learn from other cultures.

CHOW CHOW

和食とラテン料理の融合

SUSHITA



SUSHIWAHHA

CONECTA

Reinvention of the traditional



"ENJOYING AN AUTHENTIC ATMOSPHERE"
"DEFINING WHO YOU ARE"

Bars, vermouth pubs and traditional cafes are updating themselves and paying attention to the details, but without losing (and instead showcasing) their authentic Madrid essence.

They retain the same aesthetic style as when they opened, but are updating their furniture and decorative elements. Attention is paid to the quality of the produce, and the menu is more sophisticated, combining modern elements (carpaccio, tartar, premium burgers...) and traditional Madrid cuisine (chitterlings, sweetbreads, tripe, patatas bravas...)

A concept that brings new value to traditional foods and offers them to the new foodie as a source of experimentation and inspiration.

CAFÉ
COMERCIAL
ORIGINAL & CASTIZO

GRAN CLAVEL



Franchise taverns



*"SOCIALISING"
"GOING OUT FOR A BEER"
"TAPAS AT AN AFFORDABLE PRICE"*

Traditional tapas bars have given way to franchise taverns. Restaurant chains taking their theme from different regions of Spain with a gastronomic tradition (the Basque Country and Andalusia in particular) and providing a wide range of tapas and portions at an affordable price (cured ham, prawns, chicken tenders...)

A versatile and accessible alternative that keeps on growing in the capital in response to current intensive consumer demand.

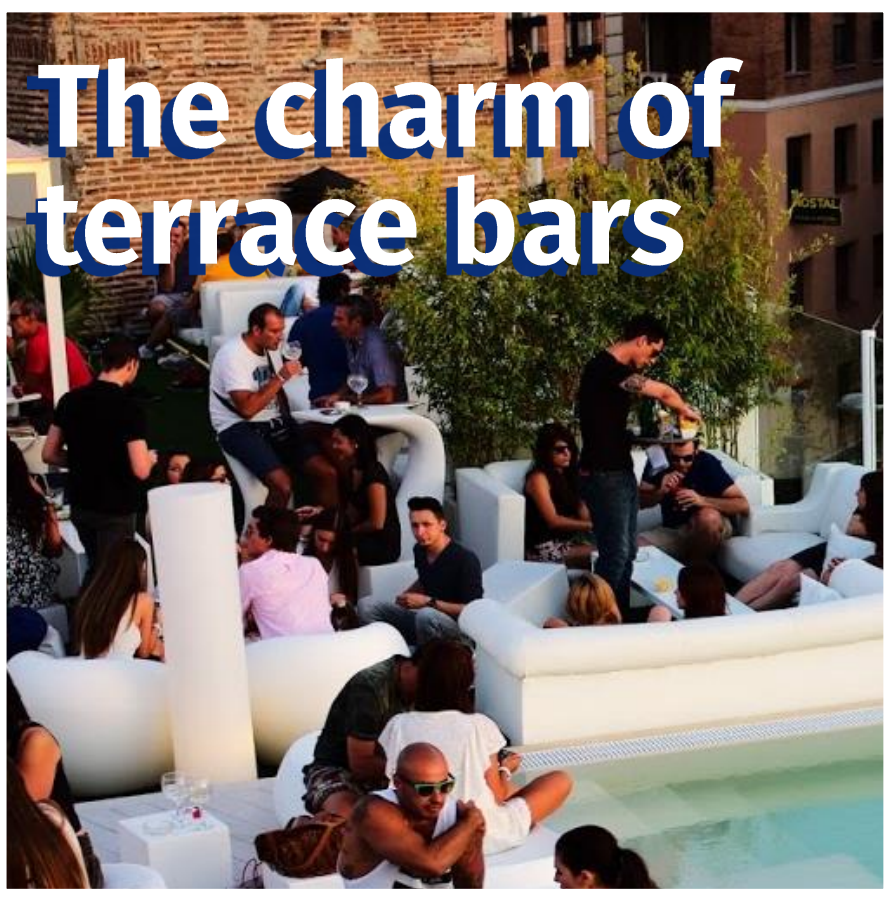
 VOLAPIÉ

 Indalo
TAPAS

BaRRa
DE PINTXOS

 LIZARRAN
PINCHOS, TAPAS Y MUCHO MÁS

CONECTA



"RELAXING AND UNWINDING"
"HAVING FUN IN MODERATION"
"EXPLORING NEW SENSATIONS"
"ENHANCING YOUR PERSONAL IMAGE"

Terrace bars are the ideal environment for the Madrid 'tardeo' moment. Spaces that allow you to enjoy the outdoors in the heart of the city while offering a peaceful, well-crafted and cosy atmosphere.

With an extensive menu of spirits and cocktails, they're a perfect option for indulging yourself and experimenting with new drinks and mixers. A setting where image value is important, and attention is paid to the serves and presentation.

Their success is encouraging bar owners to find strategies to protect them from the cold and extend the season into winter.



"WHEREVER I LAY MY HAT, THAT'S MY HOME"



AZÓTEA
CÍRCULO DE BELLAS ARTES

RoomMate | **ÓSCAR**
HOTELS | MADRID

CONECTA.

The handmade phenomenon



"ENJOYING A PRODUCT THAT'S BEEN PREPARED IN DETAIL"
"AN AUTHENTIC FLAVOUR"
"AN EXPERIENCE THAT GOES BEYOND FOOD"

Businesses that make the preparation process - homemade, handcrafted, paying attention to details - their leitmotif, and often doing so in sight of consumers.

They revolve around the idea of an original, authentic and exclusive product, which could never be achieved through an industrial process.

A highly appealing concept for a consumer who's looking for unique and unrepeatable experiences.

NOMCDO

mistura
HANDCRAFTED ICE CREAM



MA · CE · RA

CONECTA

Do It Yourself



"GIVING FREE REIN TO CREATIVITY"

"BOOSTING MY FOODIE SKILLS"

"ENJOYING A COMPLETELY PERSONALIZED PRODUCT"

Restaurants, cookery schools, workshops... that combine catering with learning and, in many cases, direct selling of products.

Businesses that echo the new foodie's interest in gastronomy and provide leisure and training activities (pastry courses, bread making, ramen, team cooking activities...)

A concept that enables consumers to be an active part of this world and to make their own mark.

kitchen
club

Super Okisake
Dulces Sanos del Futuro

RA-MEN KAGURA

levadura
madre

CONECTA

CONECTA.

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