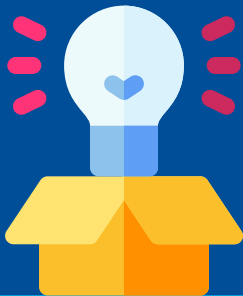


# Order summary



## An assortment of flavors

- The F&B market in the GCC today represents a mix of opportunities and headwinds; while the UAE and Kuwait saw a somewhat challenging 2019, Saudi Arabia was emerging as the next frontier in the region.



## Delivery grows though challenges show

- The delivery segment continues to grow, but there is a need to align objectives amongst stakeholders to create a more sustainable future.



## Deals and promotions, a grudging necessity

- Deals and promotions continue to influence consumers, even as some operators look to move away.
- Loyalty programs could be an alternative, although they remain arguably misunderstood and underutilized by operators.



## QSR and fast casual continue to shine

- QSR and fast casual have benefited from the value-seeking behavior of consumers, while casual has been impacted.
- There is a shift from fine dining toward premium casual concepts.



## The UAE and Kuwait, the big spenders

- Consumers in the UAE and Kuwait have the highest spend for dining out and ordering in, respectively.
- Cuisine preferences are driven by the demographic mix of the country, though Asian, Levantine/Middle Eastern and Italian dominate in the region.



## The pandemic hurt sales in 2020

- Operators have been severely hit during the crisis, particularly the lockdown, resulting in likely the worst year for the sector in recent times
- Customers continue to be wary about dining out as well as ordering in due to hygiene concerns, and it will likely take considerable time for demand to return to pre-pandemic levels across the region

