Customer trends: What did guests say?

### Ultimate Convenience

**MEET ME MORE THAN HALFWAY**

- **50%** would consider driverless or drone delivery
- **61%** order takeout or delivery at least once a week (includes a 32% increase from one year ago)
- **64%** of consumers said that they don’t anticipate returning to their pre-pandemic habits of dining in restaurants within the next 6 months

### Rules of Engagement

- **3 out of 5** customers expect the same quality and freshness in delivery and takeout as they do in the dining room
- **75%** of customers feel that a delivery wait time of up to 30 minutes is acceptable
- **37%** of customers prefer drive-throughs for restaurant ordering

### Heightened Safety Prompted by COVID-19

**CHANGES IN HABITS ARE HERE TO STAY**

- **33%** of customers said enhanced cleanliness and safety will make them more likely to return to off-premises dining sooner and to dine out more frequently
- **57%** of people use contactless delivery at least half of the time
- **45%** of respondents say they are unlikely to return to a restaurant that had a food safety incident

### Frictionless Digital Experiences

**A SIDE OF SILICON**

- **57%** of customers prefer to use a digital app to order food for off-premises dining
- **64%** prefer to order digitally on-premises at a QSR
- **40%** of customers who order off-premises prefer to use a restaurant’s own branded website or app
- **54%** of customers are willing to order from a partially or fully automated kitchen

### Customers Are Ordering a Different Experience

**COMMUNICATION IS KEY**

- **55%** of customers would pay a higher check size—between 10% and 50% more—to know about the safety and cleanliness that surround food preparation and transport
- **6%** more for a meal—the price the average customer would pay for knowing details surrounding where the food comes from

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**About the research**

Deloitte conducted three surveys of restaurant customers—one in December 2019, one in June 2020, and the most recent survey in September 2021 totaling 1,550 respondents—and also conducted individual informational interviews with high-ranking executives from 10 different quick service restaurant (QSR), fast casual, and casual dining brands.

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## Industry trends: How should restaurants respond?

### Catering to Convenience

**Dining out no longer means dining in**

Off-premises innovation is on the horizon—from shrinking dining rooms and different service models to computer vision algorithms in drive-throughs.

**How to serve a different demand**

Dedicated off-premises preparation lines, innovative packaging updates, and AI to predict the optimal time to prepare your food are the new ways restaurants are experimenting to meet the rising demand for convenience.

**Delivery is out of control**

Restaurants are trying to bring back control—reduce fees, own the data, and reestablish a direct brand experience with the customer by bringing back delivery in-house.

"Today, having both a third-party partnership as well as a first-party offering is important. We want to use third parties as much as they can to drive incremental sales to our doorstep. However, we want to be the preferred digital method of ordering when we are the ones bringing the customers in."

### Delivering on Digital

**Digital Table Stakes**

A **reliable and easy-to-use branded app** should permit “order and pay anywhere” functionality and enable a consistent but contextual cross-touchpoint experience.

**Personalization, Loyalty, Analytics: It’s all about the customer**

When a **brand personalizes the guest experience** based on an understanding of their trends and patterns, it allows for the beginning of a relationship.

**Payments Redefined**

Payment via digital means isn’t new, but there are new ways to make it easier for the guest.

**Catching up with the tech**

Sensing **technology and automation are on the rise**, but restaurants should ensure a challenge calls for a high-tech solution.

"We are analyzing that data to understand the guest, understand trends, frequencies, patterns to ultimately show care to that guest by being ready for them."

### Delivering on Safety during COVID-19

**Signaling Safety**

Many of the visible changes restaurants have made serve a dual purpose: They not only promote safety and cleanliness, but also signal to customers how seriously management takes that responsibility.

"We told team members to put masks on because customers felt they were safer, prior to any science stating that masks are effective. Try to create touchpoints with the consumer to let them know that eating food from the restaurant is safe—it’s all about ‘signaling safety to the consumer’.

**Accelerating existing plans**

Many of the operational changes discussed above are either initiated or accelerated by COVID-19. Changes such as simplified menus, redesigned back-of-house operations, or in-room dining changes are here to stay.

"We need to set standards on what should never change versus what leaves room for innovation."