

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.

Contact

Jean Chick
Principal
US Restaurant & Food Service Leader
Deloitte LLP
jchick@deloitte.com

Learn more

Visit us at
www.deloitte.com/us/restaurant-of-the-future

About Deloitte refers to one or more of Deloitte Touche Tohmatsu Limited, a UK private company limited by guarantee ("DTTL"), its network of member firms, and their related entities. DTTL and each of its member firms are legally separate and independent entities. DTTL (also referred to as "Deloitte Global") does not provide services to clients. In the United States, Deloitte refers to one or more of the US member firms of DTTL, their related entities that operate using the "Deloitte" name in the United States and their respective affiliates. Certain services may not be available to attest clients under the rules and regulations of public accounting. Please see www.deloitte.com/about to learn more about our global network of member firms.

This publication contains general information only and Deloitte is not, by means of this publication, rendering accounting, business, financial, investment, legal, tax, or other professional advice or services. This publication is not a substitute for such professional advice or services, nor should it be used as a basis for any decision or action that may affect your business. Before making any decision or taking any action that may affect your business, you should consult a qualified professional advisor. Deloitte shall not be responsible for any loss sustained by any person who relies on this publication.

Copyright © 2021 Deloitte Development LLC. All rights reserved.

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



Up to 30 minutes

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 on-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

2

The number of **loyalty programs** the average customer participates in

Loyalty program features:

Coupons or reduced prices; free items; exclusive products not available to others



81%

of people who use drive-throughs would **opt for an automated voice system** built into the drive-through



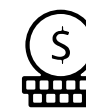
79%

of consumers **are likely to order from ghost kitchens** (includes a 20% increase from one year ago)

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**

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.

“Dining rooms are going to have to be repurposed going forward.”



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

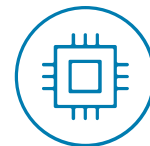
When a **brand personalizes the guest experience** based on an understanding of their trends and patterns, it allows for the beginning of a relationship.

“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.”



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

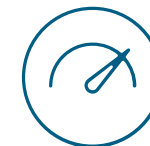
DELIVERING ON SAFETY DURING COVID-19



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.