

Customer trends: What did guests say?


ULTIMATE CONVENIENCE


 **62%** of customers cite **convenience** as the number one reason for patronizing restaurants

MEET ME MORE THAN HALFWAY

52%  of respondents **order delivery more than once a month**

 (includes a 14% increase during COVID-19)

68%  of respondents **order takeout more than once a month**

 (includes a 14% increase during COVID-19)

46%  of consumers said that they **don't see their delivery/takeout habits returning to pre-COVID levels** in the next 6 months. **23%** said it never will

RULES OF ENGAGEMENT


\$4  on average customers feel is a **fair delivery fee**

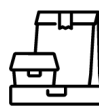
75%  of customers feel that a **delivery wait time of up to 30 minutes is acceptable**


62%  of customers say they are **willing to pick up food from convenient locations other than a restaurant** such as centralized lockers

HEIGHTENED SAFETY IN THE WAKE OF COVID-19

CHANGES IN HABITS ARE HERE TO STAY

50%  of respondents expect their **frequency of dining out to return to normal** levels within **6 months**

71%  of people request **contactless delivery**

92%  of respondents **who are eating out less often cited COVID-related health and safety concerns** as the reason

FRICTIONLESS DIGITAL EXPERIENCES

A SIDE OF SILICON

70%  of customers prefer to **order digitally for off-premises delivery**

58% prefer to **order digitally on premises at a QSR**

14%  **higher check size**—customers are willing to pay more to use their preferred ordering method

40% would consider **driverless or drone delivery**

CUSTOMERS ARE ORDERING A DIFFERENT EXPERIENCE

Since COVID-19, **apps replaced cashiers/servers** as the preferred interaction method



79% of people have a **restaurant app**




57% have a **third party delivery app**

Desired app features: ease of use, expected frequency of use, personalized offers/promotions



COMMUNICATION IS KEY

10%  **higher check size**—customers are willing to pay more to know about the cleanliness of food sanitation and transport

80%  of people say that **knowing about a restaurant's enhanced cleanliness, food, or guest safety** would entice them to eat out more often right away

50%  of customers would be **reluctant to visit a business that returns to pre-crisis norms** with no noticeable changes

About The Research

Deloitte conducted two surveys of restaurant customers—one in December 2019 and one in June 2020, totaling 550 respondents each—and also conducted individual informational interviews with high-ranking executives from ten different QSR, fast casual, and casual dining brands.

Deloitte also analyzed affinity data sourced through Deloitte's Center for Consumer Insights and conducted an additional Deloitte Safety and Cleanliness Survey of 2,000 customers and 3,157 employees in May 2020.

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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.

“Dining rooms are going to have to be re-purposed 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 re-establish a direct brand experience with the customer by bringing back delivery in-house.

“Today, having both a 3rd party partnership as well as a 1st party offering is important. We want to use 3rd 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

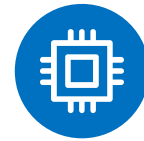
When a **brand personalizes the guest experience** based on an understanding of their trends and patterns, it allows for the beginning of a relationship.

“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 AFTER 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.