



### **FOREWORD**



**Paul Hadida** General Manager, Australia at SevenRooms

Hospitality has been among the hardest hit industries - but we've witness incredible resilience from the community over the past few months. In an entirely unprecedented situation, hospitality businesses have evolved, developing new ways to provide exceptional experiences to guests across Australia.

The impacts of the pandemic will reverberate for some time, and long-term success is dependent on building savvier, safer businesses and deeper, more meaningful guest relationships.

SevenRooms, a data-driven guest experience platform which enables operators to build direct relationships, deliver exceptional experiences, and drive more repeat business, commissioned a survey from independent research firm YouGov to understand the habits, sentiment and expectations of Australian diners.

This report helps hospitality businesses - from family-run cafes to nationwide hospitality enterprises - understand what is expected of them post-COVID, and how they can adapt to meet the needs of a changed guest.

### **METHODOLOGY**

The research was conducted by YouGov amongst a nationally representative sample of 1,064 Australians aged 18 and over.

The study was conducted online between 17-21 September 2020, with the data weighted by age, gender and region to reflect the latest Australian Bureau of Statistics population estimates.

The survey contained questions gauging:



Guest expectations from hospitality businesses



The most important factors when choosing a venue



How the pandemic has changed the way Australians view eating and drinking out



What dining out means to them



# **AUSTRALIA**



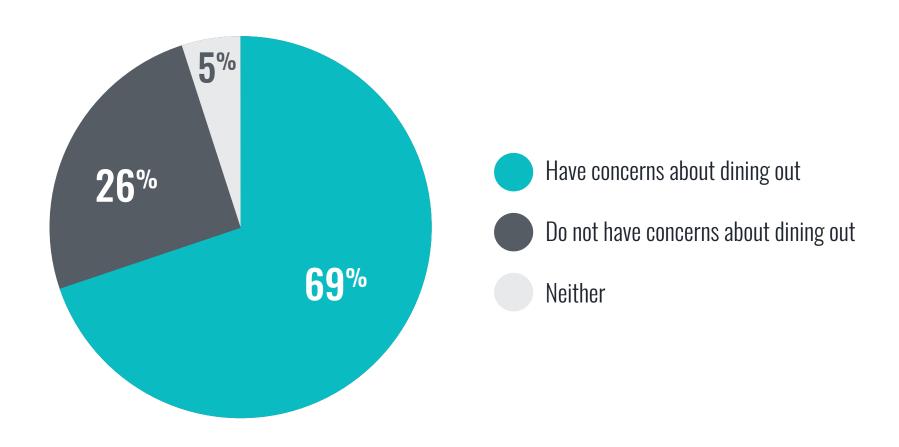
### In our recent study, we looked at country-wide data to understand guest sentiment in Australia. We discovered that:

- Australians want businesses to update their operations ahead of reopening:
  - 32% think they should only reopen with waitlist or reservations that enable social distancing
  - 31% think they should only reopen if they use technology like QR codes to protect guests
  - 9% think they should only reopen with outdoor dining
- For today's diner, a venue's health & safety guidelines (31%) are almost as important as the quality of the menu (37%) when choosing a restaurant.

- If they feel safe, customers will embrace a return to restaurants, with only 8% saying they will not return.
- 83% would share their personal data with a venue for either personalised experiences – such as tailored promotions or a menu tailored to their dietary restrictions – or health and safety measures



When it comes to dining out at restaurants today, the data shows that many Australians are hesitant to return to eating out.





The guest of today has varied interests and health and safety needs. Operators must be prepared to meet them all, as revenue is on the line. Of the Australians surveyed:



33% are comfortable ordering pick-up



25% will only visit a venue that maintains 1.5 metres or more between tables



26% would only visit venues where they limit the total number of guest



**20**% would only visit venues in their local neighborhood



14% would only visit venues they have previously visited

As restaurant doors reopen, operators have plenty to consider:

plan to dine out less than before COVID-19

26% have no concerns whatsoever about dining out

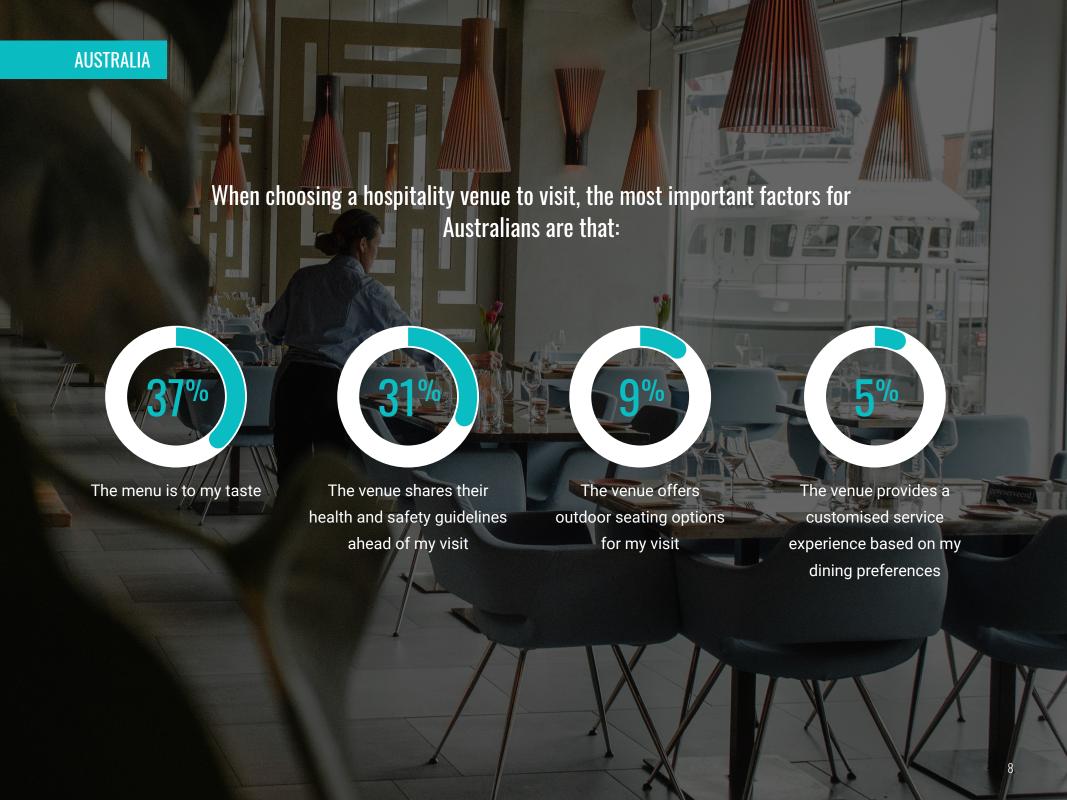
will only use takeaway/delivery until a vaccine is found



13% would only visit venues that require wait staff to wear masks

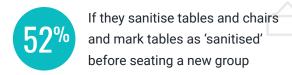


8% will only visit venues that have contactless dining (i.e. digital menus or ordering/payment options)

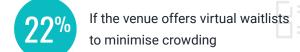


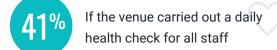


## For Australians, varied health and safety actions make them feel more comfortable visiting hospitality venues, with the following reasons being top of mind as they return to dining:

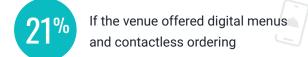










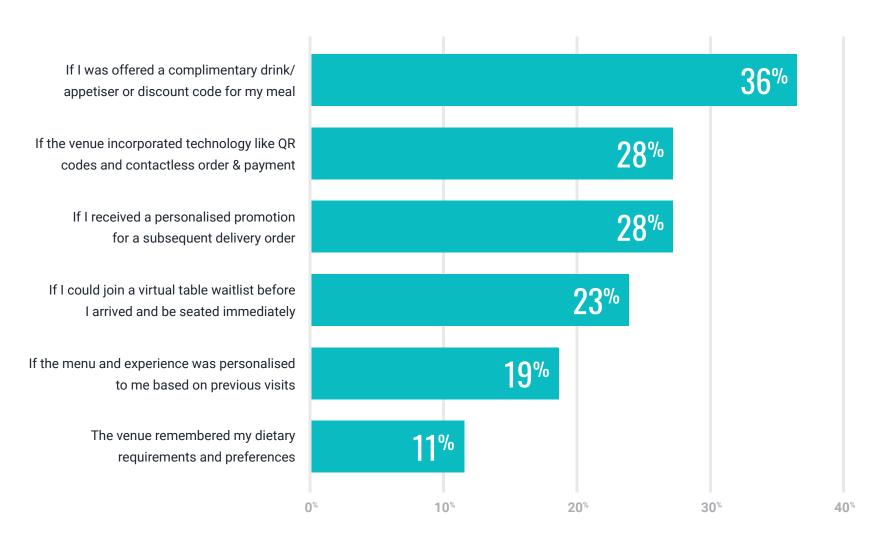


- If they have control of foot traffic within the restaurant to avoid guests coming into contact with each other
- If the restaurant incorporated physical barriers to maintain social distancing
- If the guests were required to wear masks when moving around the venue

- 37% If the restaurant offered personal hand sanitisers on each table
- If the venue pre-screened guests with temperature checks and a health and safety questionnaire
- If the restaurant sent me a detailed outline of their health/safety procedures before dining



## What's in a repeat visit? Australians stated that the following factors would encourage them to revisit a hospitality venue:





## 83% of Australians would be willing to share personal data with a venue under the right circumstances. These reasons include:



For COVID-19 tracing efforts



To receive discounted offers or promotions



To confirm and receive home food deliveries



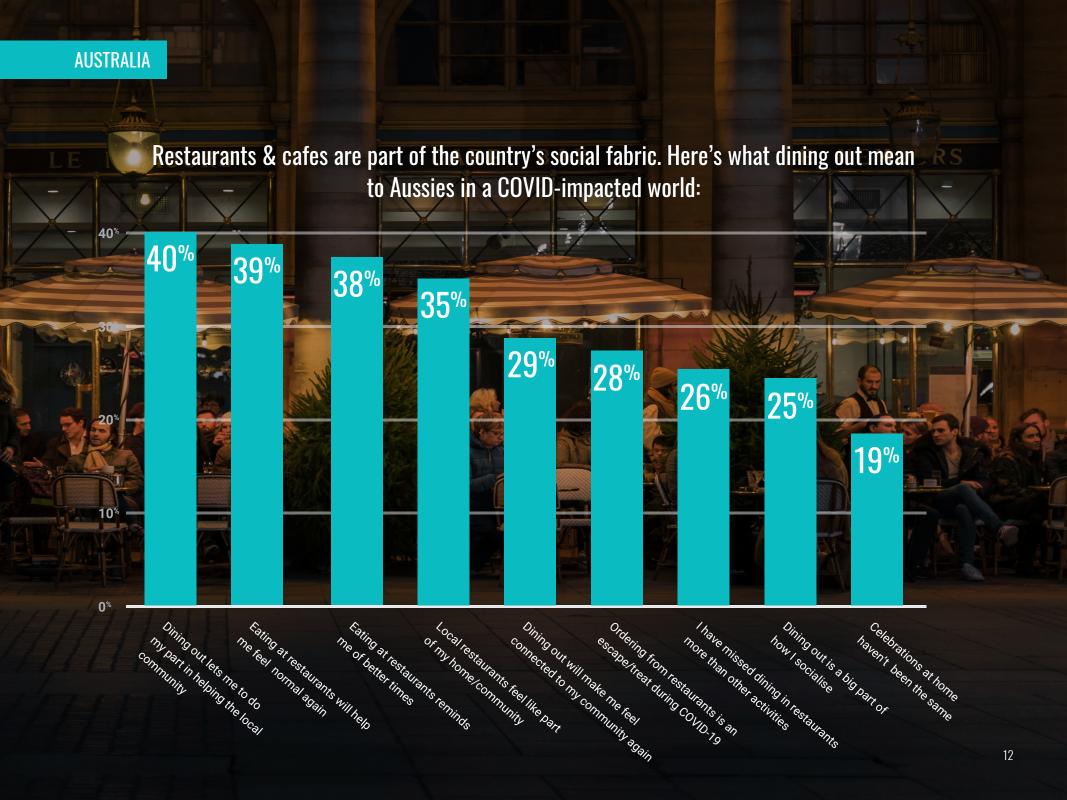
To be added to a virtual waitlist so I can arrive when my table is ready



To receive communication & updates in regard to COVID-19 precautions/processes



For a more personalised dining experience



With local lockdowns and statewide restrictions in place, we dug into Australian views on restaurants reopening.

Restaurants should only reopen with a waitlist or reservations to maintain social distancing & capacity guidelines

Restaurants should go back to normal as soon as possible

Restaurants should not reopen unless they are using technology that protects diners (e.g. virtual menus, contactless ordering & payment options, etc.)

9% Restaurants should only open with outdoor dining





NEW SOUTH WALES

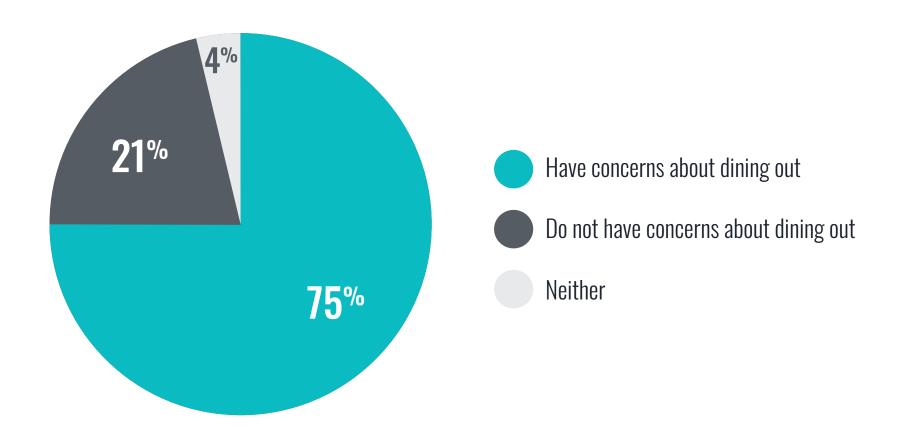


- Three quarters (75%) of people in NSW have concerns about dining out or going out for a drink over the next three months, while one in three (37%) say they will dine out less than before COVID-19 both more than in any other state.
- Diners say a venue's health and safety guidelines are as important as the quality of its menu.

- One in three (36%) say a hospitality venue incorporating technology like QR codes and contactless ordering and payment would encourage them to revisit, followed by a complimentary drink or discount (33%) and to receive a personalised promotion or offer (27%).
- Sanitising tables and chairs (59%), daily staff health checks (46%) and controlling foot traffic (44%) are the most important health and safety measures for NSW diners.



When it comes to dining out at restaurants today, the data shows that New South Wales residents are more hesitant to return to eating out than any other state.





Operators must be prepared to meet the varied interests and health and safety needs of guests, as revenue is on the line. Of those surveyed in NSW:



34% are comfortable ordering pick-up



**30**% will only visit a venue that maintains 1.5 metres or more between tables



**32**% would only visit venues where they limit the total number of guest



24% would only visit venues in their local neighborhood



18% would only visit venues they have previously visited

As restaurant doors reopen, operators have plenty to consider:

plan to dine out less than before COVID-19

have no concerns whatsoever about dining out

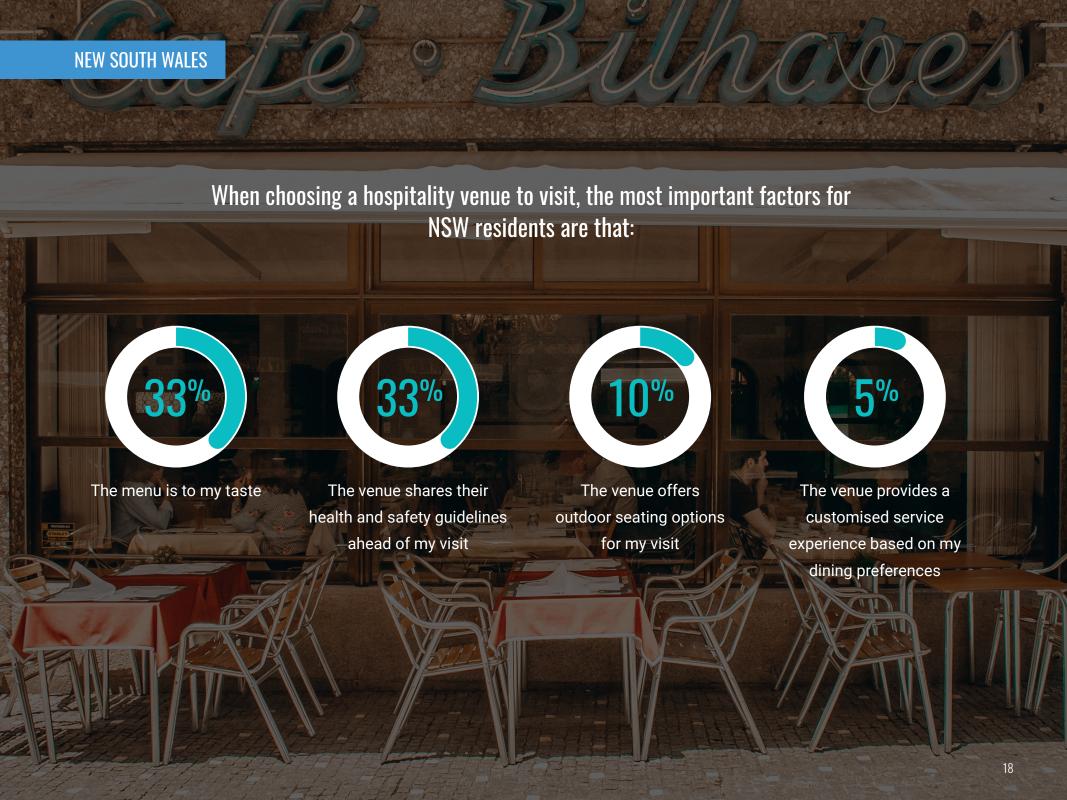
will only use takeaway/delivery until a vaccine is found



15% would only visit venues that require wait staff to wear masks

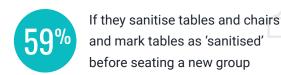


12% will only visit venues that have contactless dining (i.e. digital menus or ordering/payment options)

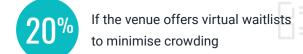




# For NSW respondents, varied health and safety actions make them feel more comfortable visiting hospitality venues, with the following reasons being top of mind as they return to dining:











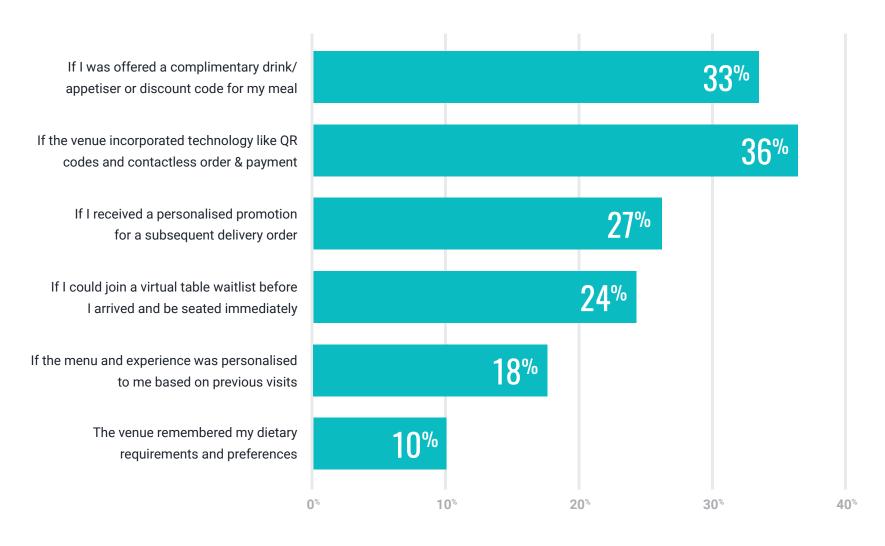


- If they have control of foot traffic within the restaurant to avoid guests coming into contact with each other
- If the restaurant incorporated physical barriers to maintain social distancing
- If the guests were required to wear masks when moving around the venue

- If the restaurant offered personal hand sanitisers on each table
- If the venue pre-screened guests with temperature checks and a health and safety questionnaire
- If the restaurant sent me a detailed outline of their health/safety procedures before dining



## What's in a repeat visit? NSW respondents stated that the following factors would encourage them to revisit a hospitality venue:





### 81% of NSW residents would be willing to share personal data with a venue under the right circumstances. These reasons include:



For COVID-19 tracing efforts



To receive discounted offers or promotions



To confirm and receive home food deliveries



To be added to a virtual waitlist so I can arrive when my table is ready



To receive communication & updates in regard to COVID-19 precautions/processes



For a more personalised dining experience



### **NEW SOUTH WALES**

With local lockdowns and statewide restrictions in place, we dug into NSW residents' views on restaurants reopening.

Restaurants should only reopen with a waitlist or reservations to maintain social distancing & capacity guidelines

Restaurants should go back to normal as soon as possible

Restaurants should not reopen unless they are using technology that protects diners (e.g. virtual menus, contactless ordering & payment options, etc.)

Restaurants should only open with outdoor dining





# **VICTORIA**

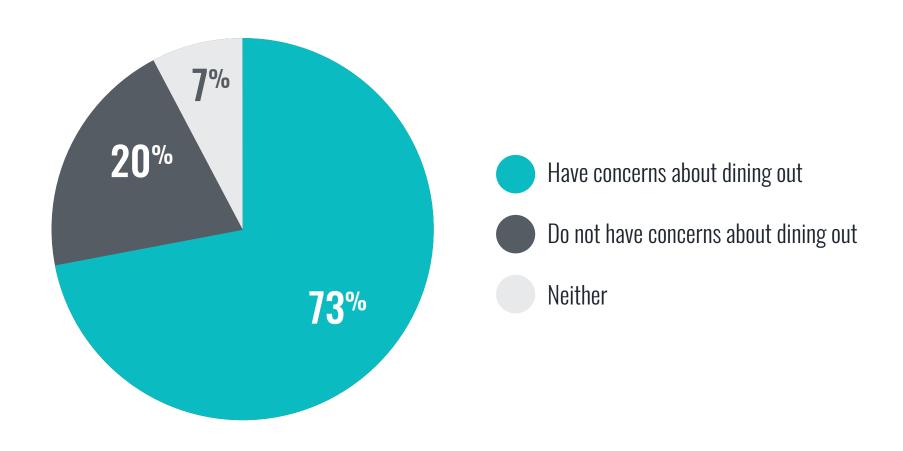


- Three quarters (73%) of people in VIC have concerns about dining out or going out for a drink over the next three months, and one in three (35%) say they will dine out less than before COVID-19 both second only to NSW.
- More Victorians believe a venue sharing its
  health and safety procedures (32%) is more
  important than the quality of its menu (30%).
- Outdoor dining has been labelled an important step for Victorian venues reopening, and 11% of Victorians will only dine at outdoor venues post-COVID - more than in any other state.

- Only 31% think restaurants should go back to normal as soon as possible, while 34% say they should only reopen with waitlists or other social distance guidelines. 28% say technology that protects guests - like virtual menus and contactless payment - would make them feel comfortable.
- Almost half (46%) say dining out will help them 'feel normal' again - more than in any other state.



When it comes to dining out at restaurants today, the data shows that Victoria residents are hesitant to return to eating out.





With 72% of VIC respondents saying that they are hesitant to return to eating out, operators must be prepared to meet the varied interests and health and safety needs of guests. Of those surveyed in VIC:



**38**% are comfortable ordering pick-up



26% will only visit a venue that maintains 1.5 metres or more between tables



27% would only visit venues where they limit the total number of guest



**22**% would only visit venues in their local neighborhood



12% would only visit venues they have previously visited

As restaurant doors reopen, operators have plenty to consider:

35% plan to dine out less than before COVID-19

have no concerns whatsoever about dining out

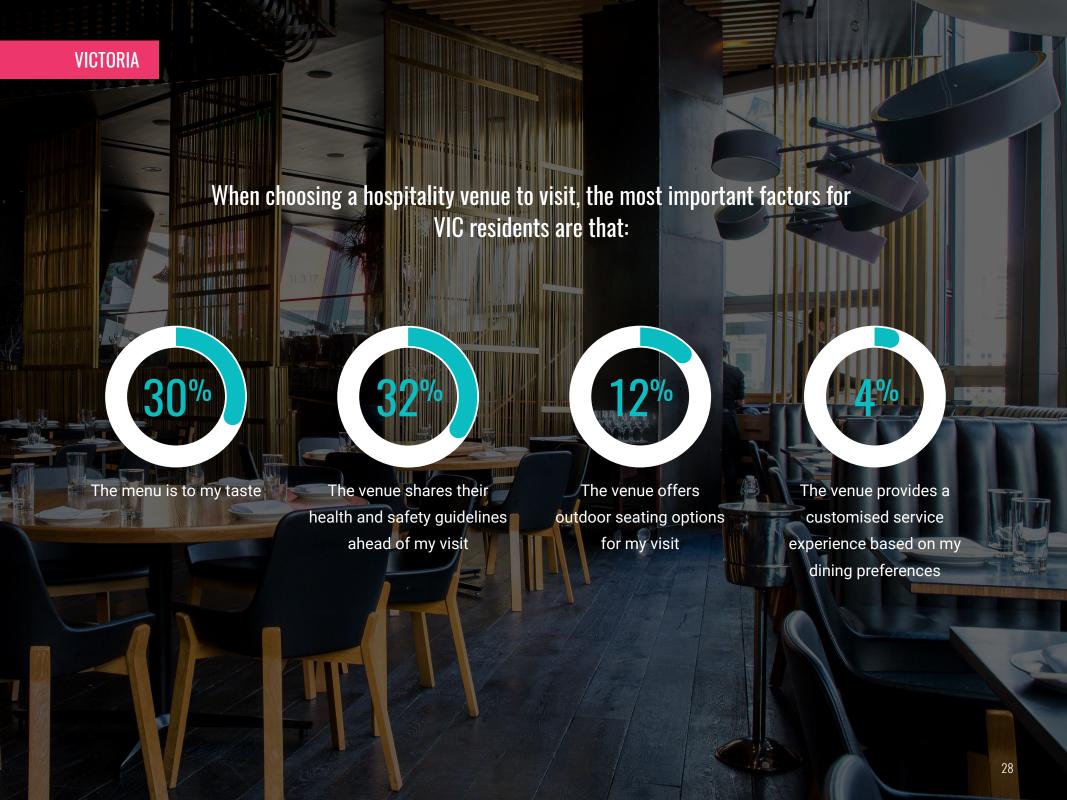
will only use takeaway/delivery until a vaccine is found



26% would only visit venues that require wait staff to wear masks

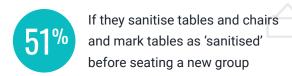


11% will only visit venues that have contactless dining (i.e. digital menus or ordering/payment options)

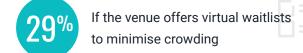


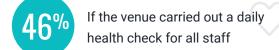


## For VIC respondents, varied health and safety actions make them feel more comfortable visiting hospitality venues, with the following reasons being top of mind as they return to dining:

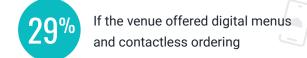










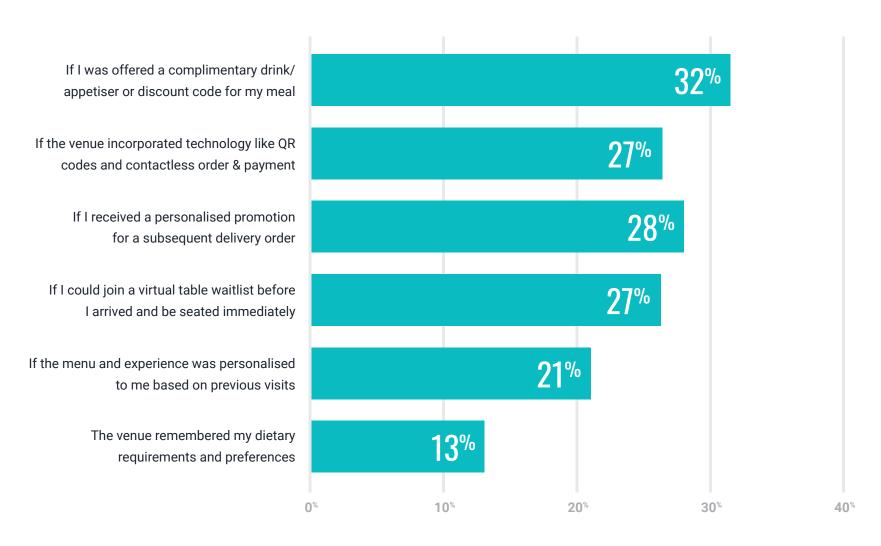


- If they have control of foot traffic within the restaurant to avoid guests coming into contact with each other
- If the restaurant incorporated physical barriers to maintain social distancing
- If the guests were required to wear masks when moving around the venue

- If the restaurant offered personal hand sanitisers on each table
- If the venue pre-screened guests with temperature checks and a health and safety questionnaire
- If the restaurant sent me a detailed outline of their health/safety procedures before dining



# What's in a repeat visit? VIC respondents stated that the following factors would encourage them to revisit a hospitality venue:





### 85% of VIC residents would be willing to share personal data with a venue under the right circumstances. These reasons include:



For COVID-19 tracing efforts



To receive discounted offers or promotions



To confirm and receive home food deliveries



To be added to a virtual waitlist so I can arrive when my table is ready



To receive communication & updates in regard to COVID-19 precautions/processes



For a more personalised dining experience



With local lockdowns and statewide restrictions in place, we dug into VIC residents' views on restaurants reopening.

Restaurants should only reopen with a waitlist or reservations to maintain social distancing & capacity guidelines

Restaurants should go back to normal as soon as possible

Restaurants should not reopen unless they are using technology that protects diners (e.g. virtual menus, contactless ordering & payment options, etc.)

Restaurants should only open with outdoor dining



# QUEENSLAND

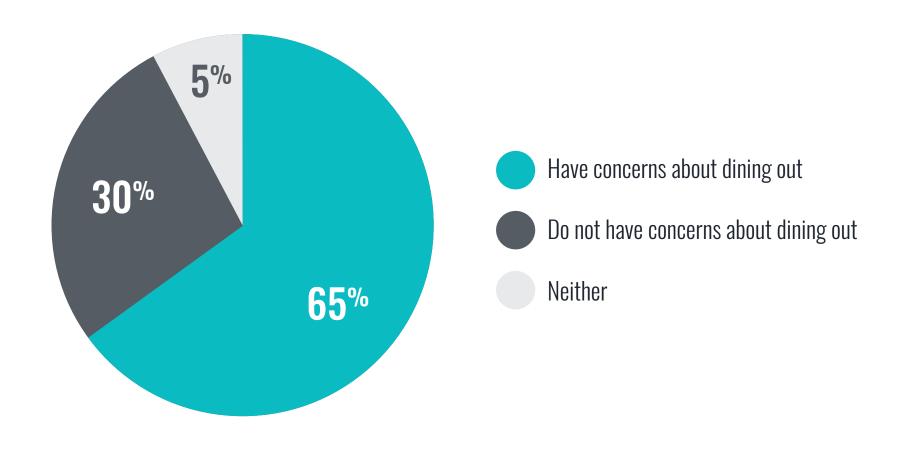


- Two thirds (65%) of Queenslanders have concerns about dining out post-COVID. However, sanitising tables and chairs (52%), daily health checks of every staff member (40%) and controlling foot traffic (39%) would make them feel comfortable visiting a venue.
- Two in three (65%) are comfortable sharing their personal data with a venue for tracing efforts more than in any other state. A further 39% would be happy to do so to receive personalised offers and promotions.

- 36% say restaurants should not reopen unless they use technology that protects diners such as contactless menus, ordering and payment options and QR codes to register guests - higher than in every state besides NSW.
- 41% say dining out helps them help their local communities, 37% that it makes them feel normal again and 34% that it reminds them of better times.



When it comes to dining out at restaurants today, the data shows that Queenslanders are hesitant to return to eating out.





With 65% of QLD respondents saying that they are hesitant to return to eating out, operators must be prepared to meet the varied interests and health and safety needs of guests. Of those surveyed in QLD:



19% would only visit venues in their local neighborhood



15% would only visit venues they have previously visited



**3**% will only visit venues that have contactless dining (i.e. digital menus or ordering/payment options)



2% would only visit venues that require wait staff to wear masks

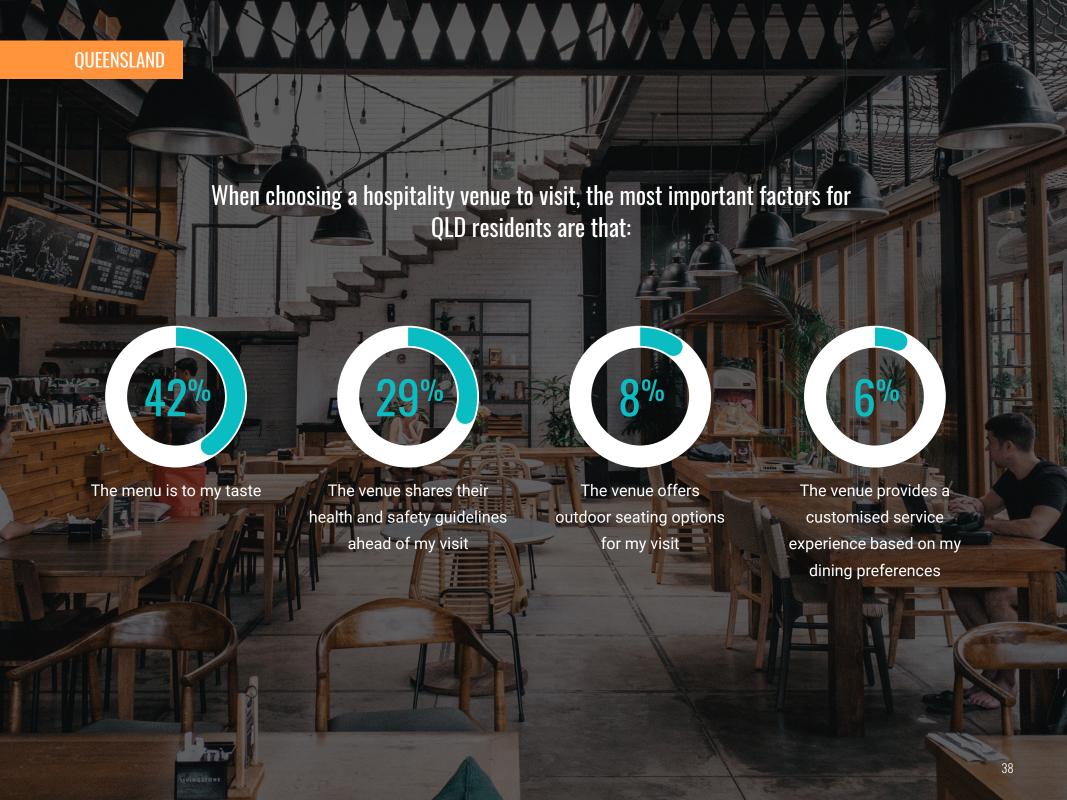
As restaurant doors reopen, operators have plenty to consider:

10%

will only use takeaway/delivery until a vaccine is found

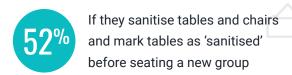
7%

will only eat at outdoor venues

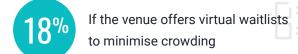




# For QLD respondents, varied health and safety actions make them feel more comfortable visiting hospitality venues, with the following reasons being top of mind as they return to dining:

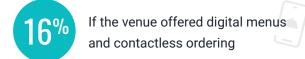




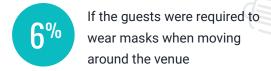




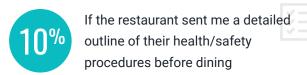




- If they have control of foot traffic within the restaurant to avoid guests coming into contact with each other
- If the restaurant incorporated physical barriers to maintain social distancing

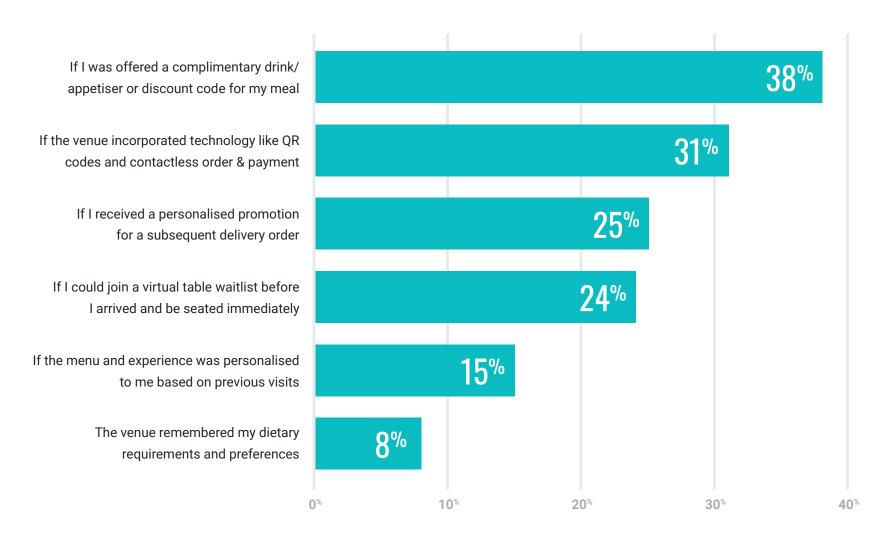


- If the restaurant offered personal hand sanitisers on each table
- If the venue pre-screened guests with temperature checks and a health and safety questionnaire





# What's in a repeat visit? QLD respondents stated that the following factors would encourage them to revisit a hospitality venue:





#### 85% of QLD residents would be willing to share personal data with a venue under the right circumstances. These reasons include:



For COVID-19 tracing efforts



To receive discounted offers or promotions



To confirm and receive home food deliveries



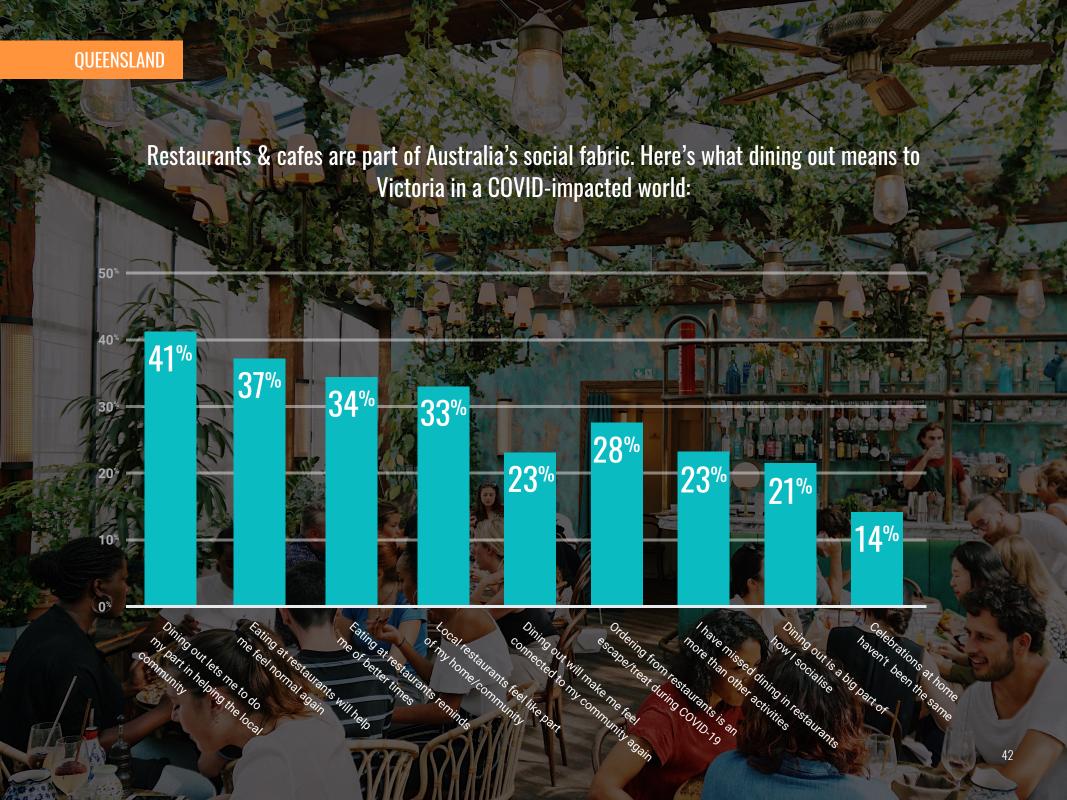
To be added to a virtual waitlist so I can arrive when my table is ready



To receive communication & updates in regard to COVID-19 precautions/processes



For a more personalised dining experience



With local lockdowns and statewide restrictions in place, we dug into QLD residents' views on restaurants reopening.

Restaurants should only reopen with a waitlist or reservations to maintain social distancing & capacity guidelines

Restaurants should go back to normal as soon as possible

Restaurants should not reopen unless they are using technology that protects diners (e.g. virtual menus, contactless ordering & payment options, etc.)

6% Restaurants should only open with outdoor dining

# SOUTH AUSTRALIA



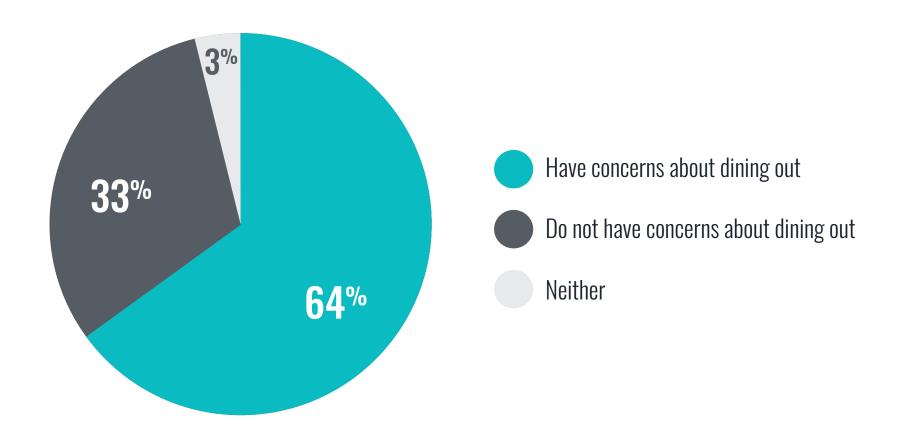


- 64% of South Australians have concerns about dining out, but say that if a venue sanitises tables and chairs (46%), controls foot traffic (40%) and provides personal sanitisers on each table (30%) it would make them feel more comfortable visiting.
- While 38% believe restaurants should return to normal as soon as possible - more than in any other state - 30% believe they should implement reservation and waitlists. A further 18% say that they should not reopen unless they use technology that protects diners such as contactless menus, ordering and payment options and QR codes to register guests.

- More diners in SA (41%) would be happy to share their personal data with a venue to receive personalised offers than to track the spread of COVID-19 (39%).
- While many Australian diners believe health and safety measures are the most important factor when choosing a venue today, 45% in SA say the menu is the most important factor for them - higher than in any other state.



When it comes to dining out at restaurants today, the data shows that South Australia residents are hesitant to return to eating out.





With 64% of SA respondents saying that they are hesitant to return to eating out, operators must be prepared to meet the varied interests and health and safety needs of guests. Of those surveyed in SA:



21% are comfortable ordering pick-up



25% will only visit a venue that maintains 1.5 metres or more between tables



23% would only visit venues where they limit the total number of guest



10% would only visit venues in their local neighborhood



11% would only visit venues they have previously visited

As restaurant doors reopen, operators have plenty to consider:

26% plan to dine out less than before COVID-19

have no concerns whatsoever about dining out

8%

will only use takeaway/delivery until a vaccine is found



6% would only visit venues that require wait staff to wear masks

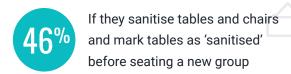


8% will only visit venues that have contactless dining (i.e. digital menus or ordering/payment options)

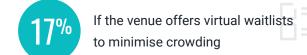


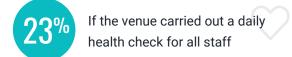


# For SA respondents, varied health and safety actions make them feel more comfortable visiting hospitality venues, with the following reasons being top of mind as they return to dining:

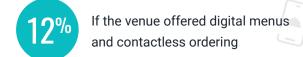










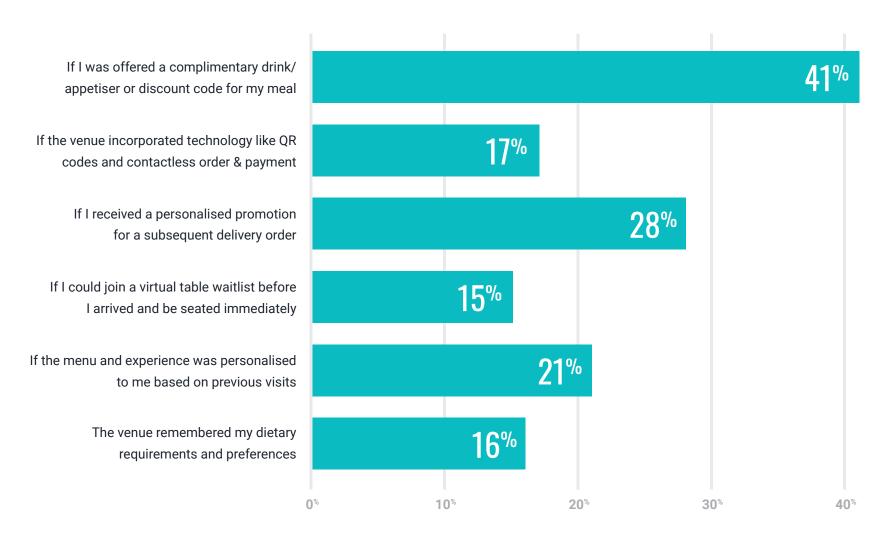


- If they have control of foot traffic within the restaurant to avoid guests coming into contact with each other
- If the restaurant incorporated physical barriers to maintain social distancing
- If the guests were required to wear masks when moving around the venue

- If the restaurant offered personal hand sanitisers on each table
- If the venue pre-screened guests with temperature checks and a health and safety questionnaire
- If the restaurant sent me a detailed outline of their health/safety procedures before dining



# What's in a repeat visit? SA respondents stated that the following factors would encourage them to revisit a hospitality venue:





### 80% of SA residents would be willing to share personal data with a venue under the right circumstances. These reasons include:



For COVID-19 tracing efforts



To receive discounted offers or promotions



To confirm and receive home food deliveries



To be added to a virtual waitlist so I can arrive when my table is ready



To receive communication & updates in regard to COVID-19 precautions/processes



For a more personalised dining experience

8%

With local lockdowns and statewide restrictions in place, we dug into SA residents' views on restaurants reopening.

Restaurants should only reopen with a waitlist or reservations to maintain social distancing & capacity guidelines

Restaurants should go back to normal as soon as possible

Restaurants should not reopen unless they are using technology that protects diners (e.g. virtual menus, contactless ordering & payment options, etc.)

Restaurants should only open with outdoor dining





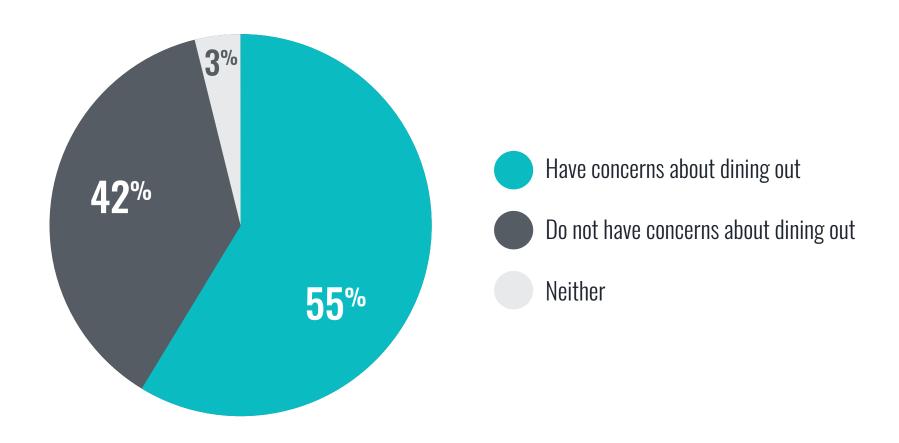


- People living in WA are less concerned than any other state about dining out or going out for a drink over the next three months. 41% say they have no concerns whatsoever, and just 21% say they will dine out less than before COVID-19.
- WA diners say a **venue's menu (43%) is more important** than venue's health and safety procedures (31%).
- 42% say a complimentary drink or discount would encourage them to revisit, followed by receiving a tailored promotion or offer (35%) and a personalised menu and experience (18%).

- When it comes to the factors encouraging diners to revisit a venue, only 8% in WA said incorporating technology like QR codes and contactless ordering and payment was important - less than any other state.
- More than a third of WA diners (35%) say that restaurants should go back to normal as soon as possible - second only to SA.



When it comes to dining out at restaurants today, the data shows that Western Australia residents are nearly split on whether or not they have concerns with eating out.





With 72% of WA respondents saying that they are hesitant to return to eating out, operators must be prepared to meet the varied interests and health and safety needs of guests. Of those surveyed in WA:



24% are comfortable ordering pick-up



17% will only visit a venue that maintains 1.5 metres or more between tables



16% would only visit venues where they limit the total number of guest



14% would only visit venues in their local neighborhood



12% would only visit venues they have previously visited

As restaurant doors reopen, operators have plenty to consider:

plan to dine out less than before COVID-19

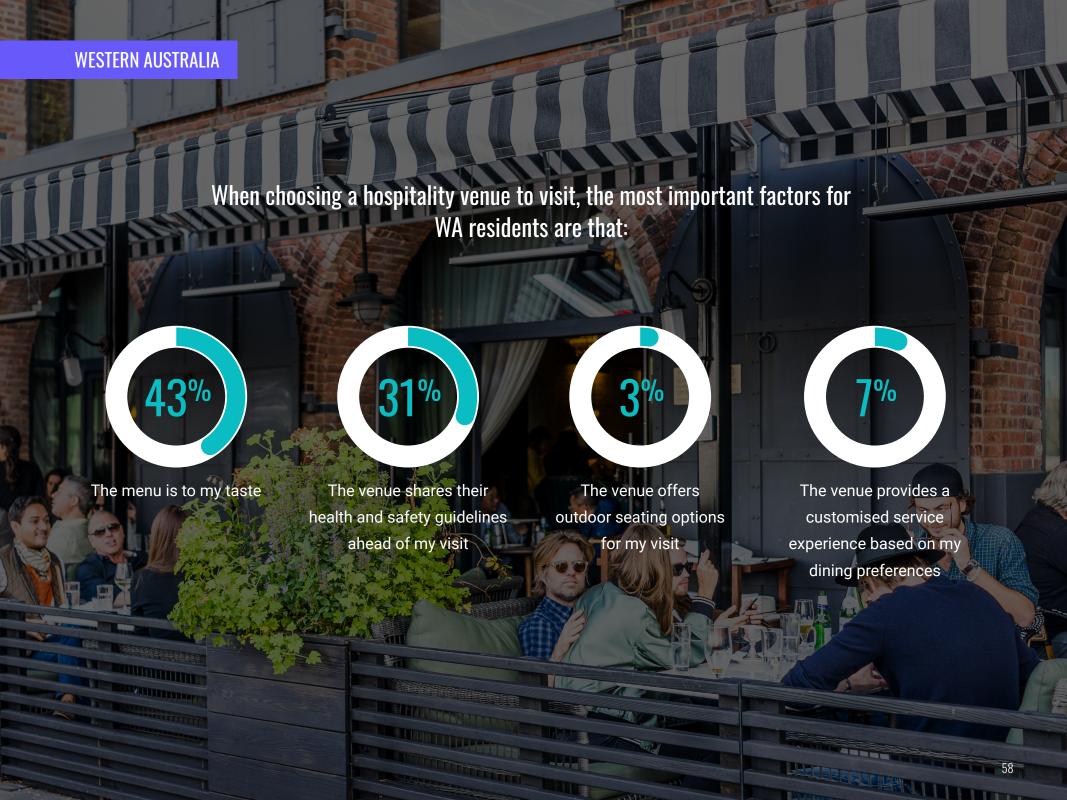
have no concerns whatsoever about dining out

9%

will only use takeaway/delivery until a vaccine is found

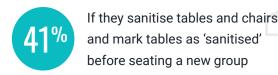


6% will only visit venues that have contactless dining (i.e. digital menus or ordering/payment options)

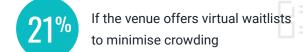




# For WA respondents, varied health and safety actions make them feel more comfortable visiting hospitality venues, with the following reasons being top of mind as they return to dining:







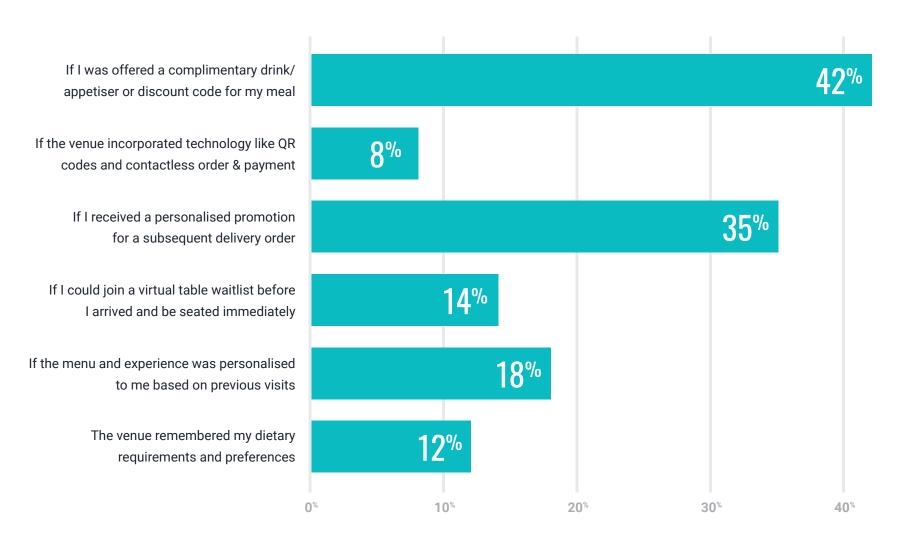
- If the venue carried out a daily health check for all staff
- 20% If the staff were required to wear masks, gloves and other PPE
- 12% If the venue offered digital menus and contactless ordering

- If they have control of foot traffic within the restaurant to avoid guests coming into contact with each other
- If the restaurant incorporated physical barriers to maintain social distancing
- If the guests were required to wear masks when moving around the venue

- 25% If the restaurant offered personal hand sanitisers on each table
- If the venue pre-screened guests with temperature checks and a health and safety questionnaire
- If the restaurant sent me a detailed outline of their health/safety procedures before dining



# What's in a repeat visit? WA respondents stated that the following factors would encourage them to revisit a hospitality venue:





### 83% of WA residents would be willing to share personal data with a venue under the right circumstances. These reasons include:



For COVID-19 tracing efforts



To receive discounted offers or promotions



To confirm and receive home food deliveries



To be added to a virtual waitlist so I can arrive when my table is ready



To receive communication & updates in regard to COVID-19 precautions/processes



For a more personalised dining experience



#### WESTERN AUSTRALIA

With local lockdowns and statewide restrictions in place, we dug into WA residents' views on restaurants reopening.

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Restaurants should go back to normal as soon as possible

Restaurants should not reopen unless they are using technology that protects diners (e.g. virtual menus, contactless ordering & payment options, etc.)

Restaurants should only open with outdoor dining

