



SEVENROOMS

Direct Discovery & Booking Behaviors

2023



Executive Summary

This research highlights how the way consumers discover, book and order from restaurants has changed. The experiential economy is currently undergoing a second coming where businesses who are deliberately designing engaging experiences are winning on the current competitive battleground for consumers' attention and money.

Booking directly gives restaurants the ability to provide a better experience as they're able to build a direct, more meaningful connection with their customers from the first interaction. At the same time, customers get more bang for their buck, a better overall dining experience and a more meaningful connection with the hospitality industry.



Paul Hadida

General Manager APAC at SevenRooms



Australia's Diners

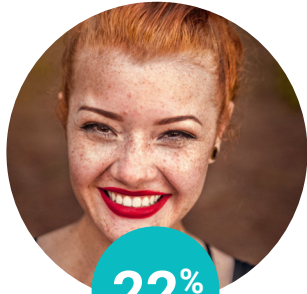
Australia is a melting pot of different cultures, cuisines and people. In a 'foodie' nation, they're all bound by their love for food, and celebrating special occasions. However, how we discover and dine at restaurants varies, with Aussies recognising themselves as one of five central personas.



33%

Special Occasion Diner

I go out to restaurants largely for special occasions and spend ample time researching which venue (and menu) is the perfect fit for the outing.



22%

Spontaneous Diner

I dine out frequently, but rarely book ahead. I let my mood, my feet and the sounds, smells and ambience emitted from a venue guide my decisions. It's walk-ins only for this spontaneous diner.



22%

Less is More Diner

I have a small handful of go-to venues, and rarely deviate from them. Once my loyalty has been established, it's difficult to lose. I always book ahead to ensure they're ready to welcome me with open arms.



13%

Homebody Diner

I don't dine out frequently, but I frequently order online to enjoy my favourite dishes and delicacies from the comfort of my sofa.



10%

Influencer Diner

There's no such thing as too much choice. I dine out often and always keep things fresh by checking out the most exciting new spot in town. I book ahead to avoid disappointment.



Singapore's Diners

That diversity is just as prominent, if not more so, in Singapore, the third most densely populated country in the world. Not only does it rank near the top of population density lists, but it's also one of the world's premier food hubs; where everyone has a favourite venue - from fine dining to the humble hawker. That's certainly true of our research with over half of Singaporeans identifying as either a spontaneous or special occasion diner.



28%

Spontaneous Diner

I dine out frequently, but rarely book ahead. I let my mood, my feet and the sounds, smells and ambience emitted from a venue guide my decisions. It's walk-ins only for this spontaneous diner.



23%

Special Occasion Diner

I go out to restaurants largely for special occasions and spend ample time researching which venue (and menu) is the perfect fit for the outing.



23%

Less is More Diner

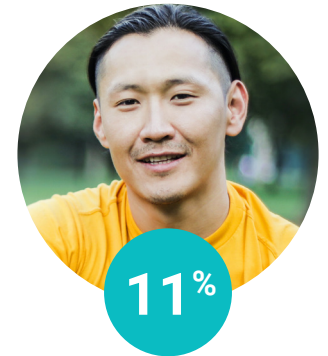
I have a small handful of go-to venues, and rarely deviate from them. Once my loyalty has been established, it's difficult to lose. I always book ahead to ensure they're ready to welcome me with open arms.



15%

Influencer Diner

There's no such thing as too much choice. I dine out often and always keep things fresh by checking out the most exciting new spot in town. I book ahead to avoid disappointment.



11%

Homebody Diner

I don't dine out frequently, but I frequently order online to enjoy my favourite dishes and delicacies from the comfort of my sofa.

Discovery

Restaurant discovery has changed exponentially. Word of mouth and foot traffic still exists, but in today's digital-first society, it's no longer the be all and end all. Today, there are many channels through which Australians are discovering venues.



4 in 5

Australians discover new restaurants through **friends and family's referrals**

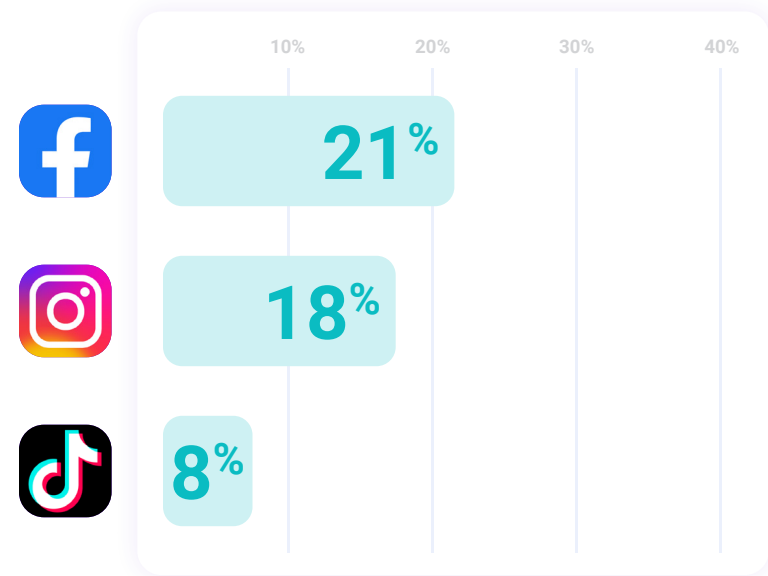


Aussies use **Google to find new venues**



Aussies use a **restaurant's direct website**, rather than third-party channel

Social media is part of the discovery process too, though.



When choosing a new restaurant, convenience (85%) and cuisine (83%) are the most important by a significant margin.

53% of consumers say **personal referrals are important** when selecting a restaurant, while **44%** say the availability of the time and party size they're searching for is.

Discovery

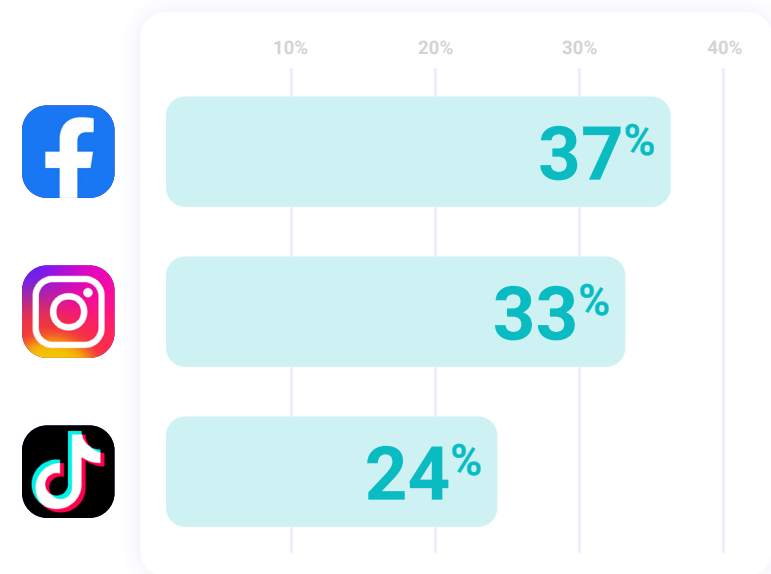
While social media was a prominent channel for Australians, its impact and influence for Singaporeans was even more significant.

Over half of Singaporeans use restaurant profiles on social media, and **43% use influencers on social media** to discover new restaurants.

That figure increased to **60% of 18-34-year-olds**.



Social media was a far more prominent discovery channel than in Australia, too.



Convenience (78%), cuisine (74%) and personal referrals (47%) are the top three most important factors for Singaporeans when dining at a new restaurant. Rounding out the top four, like Australia, was the availability of a booking to suit their needs.



Motivations to Go Direct

Discovery is the first phase of the pre-dining experience; booking is the second. In the wake of the pandemic, guests have higher expectations than ever before, and meeting and exceeding them starts long before they arrive in the venue.

The point of booking is about more than making an exceptional first impression, it's where venues who offer direct options - rather than through a third-party - can collect the approved data required to give guests the experience they deserve.

Direct channels are better for guests and venues alike.

The motivation to book direct stems across better dining experiences, easier management of preferences such as allergies or preferred seating location, and the desire to directly support restaurants. **Australians said they were more likely to book a reservation directly if...**



70%

They'd previously dined at the restaurant



37%

The restaurant offered them a complimentary drink or appetiser as incentive



35%

The restaurant was able to offer them a better overall dining experience

More than three-quarters of Aussies agree that booking directly is better for the restaurant itself. Meanwhile, **65%** said third-party booking and delivery apps were too expensive.



Motivations to Go Direct

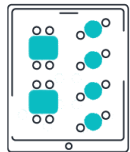
Like their Aussie counterparts, Singaporeans also recognise the value - to both them and the venue - of booking directly. To book a reservation directly, Singaporeans are more likely to be incentivised by a better seating location, a better overall dining experience, or a complimentary drink or appetiser.

Singaporeans said they were more likely to book a reservation directly if...



62%

They'd previously dined at the restaurant



44%

The restaurant gave them a better seating location



40%

The restaurant was able to offer them a better overall dining experience



Like in Australia, **three-quarters of Singaporeans** agree that booking directly is better for the restaurant. Meanwhile, 66% said third-party booking and delivery apps were too expensive.



Special Occasions

While the process of discovering and booking a restaurant has changed, what will never change is the social significance of dining out, and the memories it facilitates. That's certainly a sentiment that many Australians can attest to.

Around one-third of Australians see themselves as 'special occasion' diners - the most common diner persona.

That's reflected in the frequency of their visits, with 31% dining out once a month and 29% for special occasions such as a birthday or anniversary.

When booking a restaurant for a date or special occasion, 43% of Aussies (and 51% of 18-34-year-olds) only visit their 'go-to' or book a well-researched restaurant to show off, rather than booking somewhere new.





Special Occasions

In Australia, there is - for the time being at least - a focus on quality over quantity. But that's not the case in Singapore, where locals are still looking for special occasions, but are also dining out more often and more spontaneously.

Over a quarter of Singaporean diners classify their dining personalities as 'spontaneous diners' - and that could impact the high frequency of their dining out.



Dine out **multiple times** per week



Dine out **once** a week





About SevenRooms

SevenRooms is a guest experience and retention platform that helps hospitality operators create exceptional experiences that drive revenue and repeat business. Trusted by thousands of hospitality operators around the world, SevenRooms powers tens of millions of guest experiences each month across both on- and off-premises. From neighborhood restaurants and bars to international, multi-concept hospitality groups, SevenRooms is transforming the industry by empowering operators to take back control of their businesses to build direct guest relationships, deliver exceptional experiences and drive more visits and orders, more often. The full suite of products includes reservation, waitlist and table management, online ordering, mobile order & pay, review aggregation, email marketing and marketing automation.

Founded in 2011 and venture-backed by Amazon, Comcast Ventures, PSG and Highgate Ventures, SevenRooms has dining, hotel F&B, nightlife and entertainment clients globally, including: MGM Resorts International, Mandarin Oriental Hotel Group, The Cosmopolitan of Las Vegas, Wynn Resorts, Jumeirah Group, Hard Rock Hotels & Resorts, Wolfgang Puck, Michael Mina, Bloomin' Brands, Giordano's, Australian Venue Company, Altamarea Group, AELTC, The Wolseley Hospitality Group, Dishoom, Live Nation and Topgolf.

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