



SEVENROOMS

RESTAURANT RECKONING: DYNAMIC DINER REPORT

Understanding Diners In
A New Era Of Hospitality



FOREWORD



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When COVID-19 hit the U.S. in March 2020, hospitality operators throughout the country had to quickly adapt their businesses, implementing a new playbook overnight for navigating new revenue streams and ever changing regulations, all with a continued focus on the health and safety of staff and guests. Now, as we enter a new era for hospitality, there are many opportunities ahead as operators embrace technology to help them stay flexible while providing exceptional experiences both on- and off-premise to guests.

That's why SevenRooms decided to commission our ***Restaurant Reckoning: Dynamic Diner Report***. Through this study, we took a deeper look at how the global pandemic has changed guest expectations for dining out and ordering in. Our goal, as always, is to help our operators be as prepared as possible to not only meet these new guest expectations but exceed them, leveraging four new diner personas to provide best-in-class experiences to their guests.

From what encourages a guest to dine out or order delivery, to what steps restaurants need to take for guests to feel comfortable doing so, this data helps showcase the importance of a direct relationship with guests in driving profitability to businesses when they need it most. Above all, it provides a playbook for how operators can deliver extraordinary experiences that keep guests coming back for more.



UNDERSTANDING GUEST WANTS AND NEEDS IN A NEW ERA

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. **In fact, Americans that expressed interest in dining out will only keep their reservations at a new restaurant if certain measures are met, including:**



More than half (53%)
Six-Foot Social Distancing



More than half (52%)
Employee Face Masks



Nearly 1 in 3 (29%)
Guest Face Masks While
Moving Around the Venue



Just over 1 in 5 (21%)
On-Site Health Screenings

As restaurant doors reopen, operators have plenty to consider:

38% say they are looking **forward to dining out again** over the next three months.

23% said they will **only order for pickup and/or delivery** for the rest of 2020.

THE PICK-UP PATRON

Not all Americans are ready to venture back out to restaurant dining rooms.

In fact, **more than 1 in 4 specified they will not feel comfortable dining out until there is a vaccine.**

But that doesn't mean they're a lost cause. Rather, any savvy operator should be quick to capitalize on the pick-up patron. Their doorstep doesn't have to be the last stop.

Nearly 1 in 5 of Americans would revisit a restaurant if given a promotion or deal for a subsequent order.

Of Americans interested in off-premise dining:

51% are comfortable ordering for **pick-up**.

43% are comfortable ordering for **delivery**.





THE SAFETY-SAVVY CONSUMER

Physical health is top of mind for guests when choosing where to dine out. While many operators have adjusted to CDC health and safety guidelines, the most important safety measures to entice Americans to visit or revisit a venue are:



Physical barriers between tables



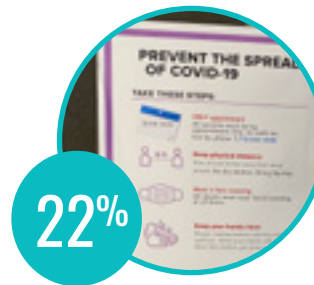
Personal table hand sanitizer



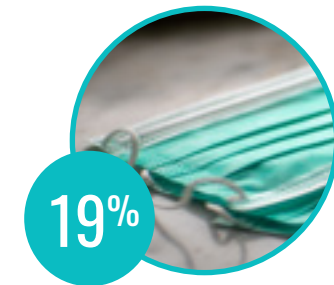
Dining Pods



Food coverings (in plastic or glass) when served



Detailed outline of health and safety procedures



Providing face masks upon arrival



THE TECH-CONSCIOUS CONTACTLESS DINER

Tech not only enables a more seamless dining experience, but also helps restaurants deliver on a contactless one to meet the needs of health-conscious consumers.

13%

of Americans will **only dine out** at restaurants with contactless dining options.

Additional tech-forward features most likely to encourage Americans to visit a restaurant include:

22%



Joining a waitlist before they arrive, so they can be seated immediately

21%



Technology to aid in Coronavirus (COVID-19) contact tracing efforts

17%



Technology like QR codes for contactless ordering and paying

THE CAREFREE GUEST

Some Americans are eager to get back to their going out routine, and may not necessarily require outdoor dining, virtual waitlists or contactless order and pay to bring them to a venue.

Of those Americans interested in dining out:

29% are comfortable dining at venues that have indoor seating

VS

42% are comfortable with outdoor seating

25% are comfortable dining at restaurants they have never been to before

VS

37% comfortable dining at restaurants they are familiar with and have been to before

15% of guests interested in dining out are **comfortable visiting other venues, like bars.**





LEVERAGING DATA TO BUILD LOYALTY

As operators try to deliver guest experiences to satisfy all four personas, the common theme throughout will be utilizing data to personalize each and every dining experience – whether for take-out or dining in.

Guests who are comfortable sharing their data with restaurants are happy to do so for specific benefits, including:

☆ DEALS



1 IN 2 (50%)

To receive discounted offers or promotion

NEARLY HALF (48%)

To receive delivery or pick-up promotions or offers

♡ HEALTH



NEARLY 1 IN 2 (45%)

For contact tracing efforts

NEARLY 1 IN 3 (29%)

For personalized communication and updates around restaurant COVID precautions and processes

🍴 PERSONALIZED DINING



NEARLY 1 IN 4 (24%)

A more personalized dining experience

(i.e. a menu tailored to dietary preferences)



For more information on SevenRooms, please visit sevenrooms.com.

Methodology

SevenRooms commissioned YouGov PLC – a third party, professional research and consulting organization – to poll the views of 1,237 individuals who agreed to take part. Fieldwork was undertaken online between July 31 – August 3, 2020. The figures have been weighted and are representative of all US adults (aged 18+).