Restaurant omnichannel research.

December 8, 2020
The research goals.

• See how people prefer to order food.
• Find out if like ordering more online or in-store at fast casual restaurants.
• Learn which restaurants are providing the best solutions for their customers.

Methodology overview.

• MFour used Surveys On The Go® (SOTG).
• GPS used to survey consumers leaving stores.
• Then, digital behavior was observed online.

Time frame.

• In-store: 9/23 - 10/10/20.
• Online: 9/23-11/6/20.

Sample.

• 18 years of age.
• National representation.
• Natural fall out on age, gender, ethnicity.
Repeat users.

- Online returns 11% more than in-store.
- Consumers who used an app to order food have a higher intent to do it again.

Online: higher experience & satisfaction than in-store.
Restaurant-owned apps have a loyal base.

- Diners are hungry for apps.
- 51% prefer restaurant apps to websites & 3rd party apps.

**Preferred Method for Ordering Food for Delivery**

<table>
<thead>
<tr>
<th></th>
<th>RESTAURANT</th>
<th>THIRD PARTY FOOD DELIVERY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mobile app</td>
<td>51%</td>
<td>18%</td>
</tr>
<tr>
<td>Website via a phone or tablet</td>
<td>19%</td>
<td>6%</td>
</tr>
<tr>
<td>Website via a laptop or desktop</td>
<td>5%</td>
<td>Website</td>
</tr>
</tbody>
</table>

App users.
Freshness + user-friendly site = customer satisfaction.

Feedback on the food ordering experience.

<table>
<thead>
<tr>
<th>TOP TIER (over 90% satisfaction ratings)</th>
<th>SECOND TIER (80%-90% satisfaction ratings)</th>
<th>THIRD TIER (below 80% satisfaction ratings)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food tasted fresh.</td>
<td>The portion was just the right amount.</td>
<td>My order was on time.</td>
</tr>
<tr>
<td>Food was stored well.</td>
<td>I was able to order everything I wanted.</td>
<td>I was able to track order progress.</td>
</tr>
<tr>
<td>Website/app was user-friendly.</td>
<td>I was able to customize my order.</td>
<td>The delivery fee was reasonable.</td>
</tr>
<tr>
<td></td>
<td>My order was accurate.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>No items were missing from the order.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>I was satisfied with the food temp.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>FRESHNESS USER-FRIENDLY APP</th>
<th>ORDER ACCURACY MADE TO ORDER</th>
<th>ON TIME DELIVERY</th>
</tr>
</thead>
<tbody>
<tr>
<td>A&amp;W</td>
<td></td>
<td>mfour</td>
</tr>
</tbody>
</table>
Safety + contactless payment = comfortable dining.

Thoughts on the restaurants’ response to COVID-19.

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<tr>
<td>The staff always wore facial masks.</td>
<td>The restaurant was clean.</td>
<td>Contactless payment options available.</td>
</tr>
<tr>
<td>The measures made me feel safe to dine in.</td>
<td>High-touch areas cleaned and disinfected.</td>
<td></td>
</tr>
<tr>
<td>Signs posted to stop spread of COVID-19.</td>
<td>Outdoor dining tables were spread out.</td>
<td></td>
</tr>
<tr>
<td>High touch items were removed from use.</td>
<td></td>
<td></td>
</tr>
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</table>

STAFF WORE FACIAL MASKS | CLEANLINESS SAFETY ASSURANCE | CONTACTLESS PAYMENT OUTDOOR SEATING SPREAD OUT
Expect consumers to keep using apps & websites.

Shifts in online orders from COVID-19.

Use tech to buy food. (Much or somewhat more)

- In-store: 10%
- Online: 20%

Order food online or on app. (Much or somewhat more)

- In-store: 11%
- Online: 20%

Get food delivered. (Much or somewhat more)

- In-store: 9%
- Online: 18%

Once the COVID-19 pandemic has subsided, how much of your food ordering from (INSERT LOCATION) will still be online or through an app?
Panera Bread leads in best online ordering experience.

<table>
<thead>
<tr>
<th>Preferred way to order food?</th>
<th>Restaurant’s mobile app.</th>
<th>Restaurant’s website.</th>
</tr>
</thead>
<tbody>
<tr>
<td>How easy is it to order?</td>
<td>Very easy.</td>
<td>Difficult.</td>
</tr>
<tr>
<td>Happy with order?</td>
<td>Very satisfied.</td>
<td></td>
</tr>
<tr>
<td>Will order again?</td>
<td>Extremely likely.</td>
<td></td>
</tr>
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</table>

*Indicates Buffalo Wing scores significantly above or below one or both competitors*
Happy with COVID-19 precautions.

- Staff always wore facial masks.
- Took steps to keep it clean.
- Signs posted to stop spread of COVID-19.
- Contactless payment options available.
- Excellent.

Buffer Wild Wings: opportunity to improve safety guidelines.

<table>
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<th>B&amp;M</th>
<th>Buffalo Wild Wings: opportunity to improve safety guidelines.</th>
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Ordering at Panera.

- People like Panera.
  - 50% used an app—or the site—4x or more in the past 6 months.

- Consumers like to customize.
  - App + web lets people customize their order for food preferences.

- Online is better than inside.
  - Consumers prefer to order online or in an app than dine inside.

Doing great in-store.

- Outdoor dining.
- Contactless payment.
- Good variety.
- For cravings.

And online.
Ordering at Chilis.

- For special occasions.
  - 50%+ eat here to **celebrate** a special occasion.
- It’s a consistent experience.
  - NPS remains **consistent** for online and in-restaurant orders.
- They like the food.
  - Diners like: **high-quality food, fast service, value, kid’s menu.**

Doing great in-store.

- **Dining options.**
- **Strong COVID response.**
- **Contactless payment.**
Ordering at BWW.

- Also, for special occasions.
  - 50%+ eat here to celebrate a special occasion.
- They like to customize.
  - App + web lets people customize their order for food preferences.
- Coupons are a nice touch.
  - Diners like: coupons and special offers for online orders.

Has areas for improvement.

- COVID response.
- Dine-in & delivery times.
- Contactless payment.
About MFour.

MFour introduced Surveys On The Go® in 2011.

As the nation’s largest, highest-rated consumer panel, it tracks 10 million daily consumer journeys.

Clients use our panel to speak with any buyers they want—in-store, online, or on an app.

The result? Accurate data based on consumers’ actions: and context on why they made them.
MFour tracks 10 million daily consumer journeys through our app Surveys On The Go®.

As they exit your app or site, consumers are instantly pushed your survey. It’s all done via Surveys On The Go®—giving you these Point of Emotion® insights.
MFour tracks 10 million daily consumer journeys through our app Surveys On The Go®.

We GeoValidate® 12.5 million U.S. locations. Consumers who enter a GeoValidated® retail site are verified as having visited that location.

As they exit your store, shoppers are instantly pushed a survey via the Surveys On The Go® app. You get Point of Emotion® insights.
Choose better market research.