



Georgia-Pacific

# FOODSERVICE CONSUMER PREFERENCES AND MINDSETS

- ❑ RECOMMENDED AREAS OF INVESTMENT
- ❑ ATTITUDES TOWARD STAFF INTERACTION

October 2021

FSS-21-5402 | Kaylor Hildenbrand

# BACKGROUND AND METHODOLOGY

GP PRO and the foodservice team is always looking to learn from both customers and consumers. With increased focus on delivery, multiple pivots in operations and extensive labor challenges, the team wanted to explore consumer response to some of those changes and where consumer interest might lie going forward to help inform the guidance we offer to our customers.

To that end, an online survey was conducted in early October 2021 utilizing Fuel Cycle for programming and execution and Dynata for a consumer sample of 1000+ individuals who have had experience with various restaurant types and dining occasions over the past 2 months. The survey was fielded to reflect US demographics.

Note that some totals might not equal 100% due to rounding.



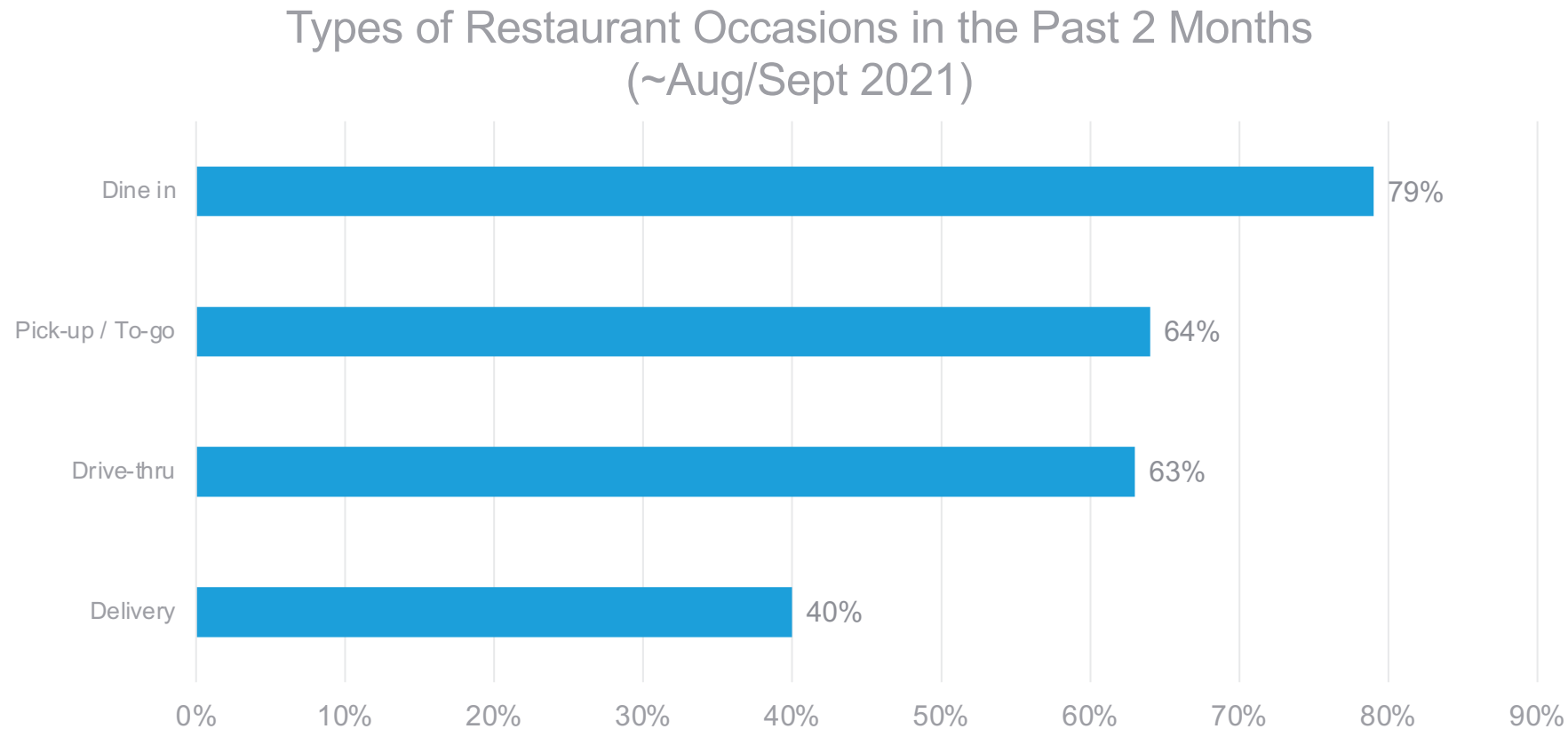
# EXECUTIVE SUMMARY

- Dine-in is back with 79% of consumers having a dine-in experience within the past 2 months.
- QSR and casual dining segments are being patronized more commonly compared to other segments.
- Consumers suggest a restaurant looking to improve operations focus on order accuracy (42% selected) and speed of service (36% selected), with a focus on face-to-face hospitality/customer service also of high interest (29% selected, while only 20% selected heat retention for delivery orders).
- 43% want the opportunity to report an incorrect/unsatisfactory delivery order through the app.
- When it comes to desired level of staff interaction, younger consumers are more likely to value DIY experiences and access to help when needed, while older consumers lean toward the desire for more interaction.



# DINE-IN IS STILL A THING

While the convenience of delivery and drive-thru / to-go meals remain popular, consumers seem to be taking advantage of the dine-in experience once again.



S5 – In what way(s) have you enjoyed a restaurant meal over the past 2 months?

Base=1145

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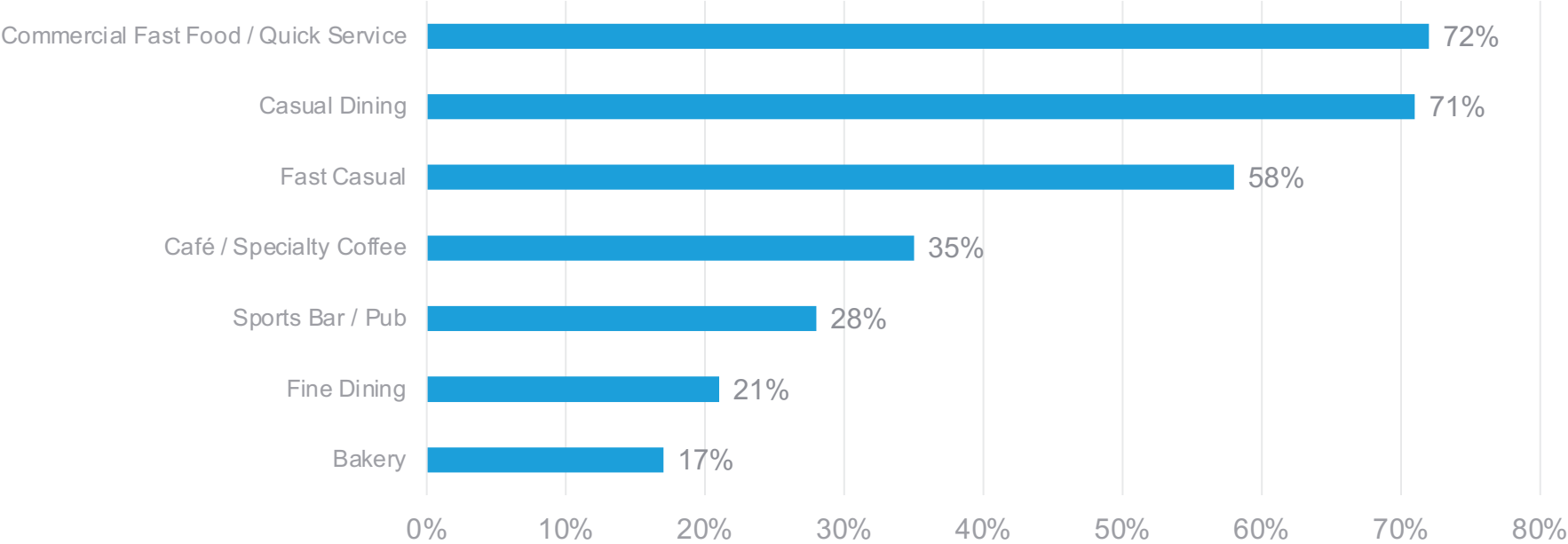


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# CONSUMERS ARE ENJOYING A VARIETY OF MEAL EXPERIENCES

Not surprisingly, limited service/casual dining meals are being enjoyed by guests more commonly than specialty establishments or other segments. However, experiences in the sports bar and fine dining segments could signal a return to entertainment and celebration.

Types of Restaurants Patronized in the Past 2 Months  
(~Aug/Sept 2021)



Q1 – From which of the following types of restaurants have you ordered food in the past 2 months (consider dine-in and to-go/delivery occasions)?  
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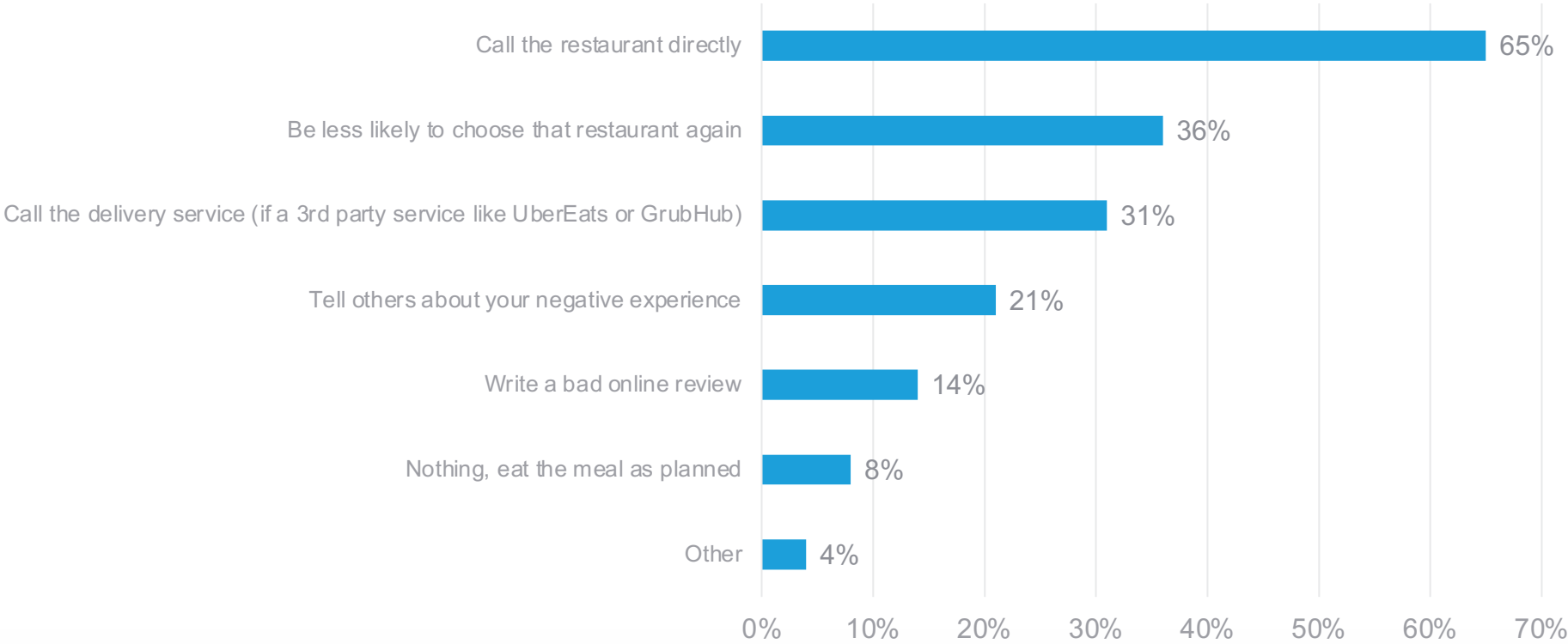


# DELIVERY MUST BE DONE WELL

When food has traveled to the guest, remediation for an order gone wrong is not as easy as approaching the counter for a correction. Still, in most cases, someone will hear about it, and it could negatively impact brand perceptions and revenue.

Guest Response When a Delivery Order Goes Wrong

(% selected)



Q4 - If you order for delivery and something is incorrect, missing, or unsatisfactory, which of the following are you likely to do? Select all that apply.

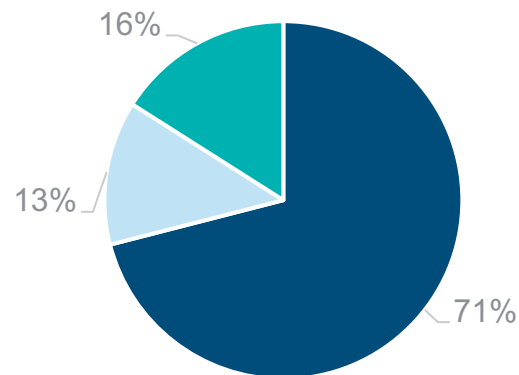
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# DIGITAL IS NOT THE SILVER BULLET FOR THE GUEST EXPERIENCE

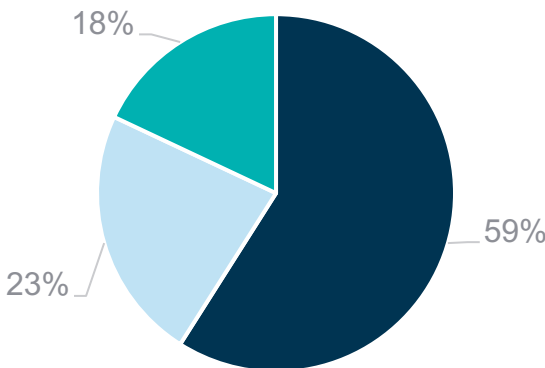
In response to COVID-19, many restaurants pivoted to contactless experiences. Guests, however, expressed a preference for more traditional experiences such as having a printed menu at a casual dining restaurant (71%), and placing their order with a person at a FF/QSR restaurant (59%).

Guest Preference for Menu Presentation (Casual Dining)



- Physical printed menu
- QR code to access a digital menu
- No preference

Guest Preference for Placing an Order (FF/QSR)



- Placing your order with an employee at the counter
- Kiosks for placing your order (do it yourself)
- No preference

Q5 - Now, thinking about viewing the menu for an in-person visit to a casual dining restaurant (with waiter service), which, if either, do you prefer?  
Q6 - Now, thinking about ordering during an in-person visit to a fast food or quick serve restaurant (no waiter service), which, if either, do you prefer regarding ordering food?  
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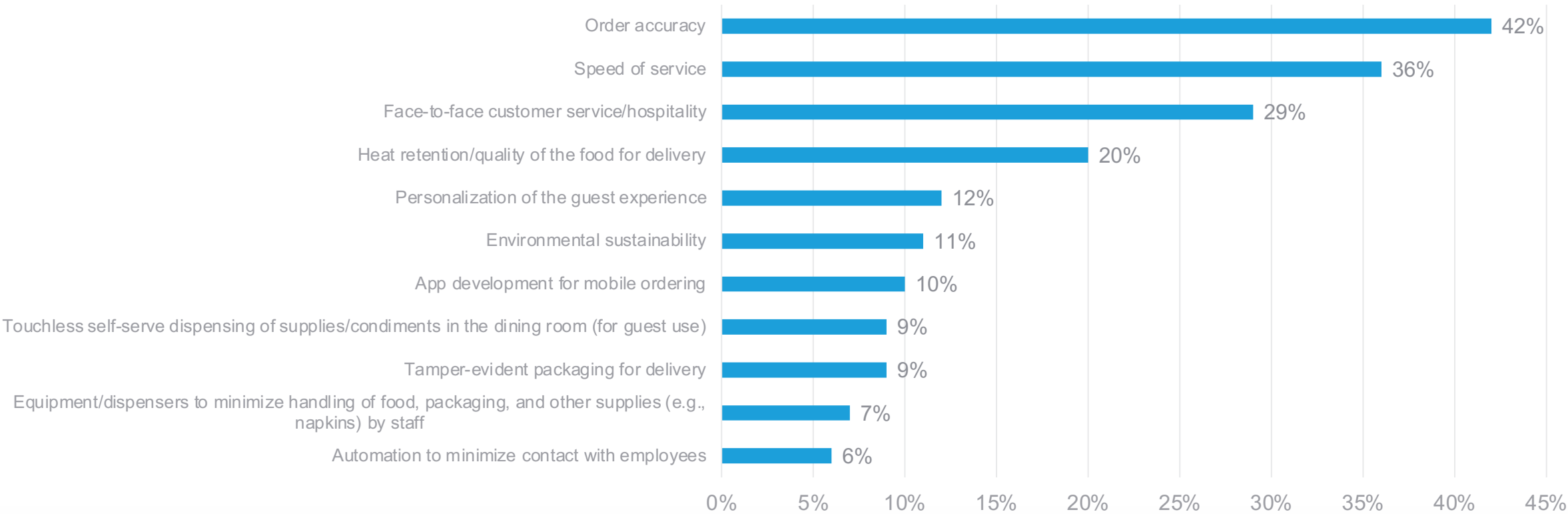


# GUESTS PRIORITIZE ORDER ACCURACY AND SPEED OF SERVICE

Asked in what area(s) a restaurant should consider investing, 42% identified “order accuracy” and 36% noted “speed of service”. Perhaps reflective of the recent shifts to “contactless” experiences, 29% want restaurants to focus on investments in “face-to-face customer service/hospitality” over other more tactical elements of the dining experience.

Guest Recommended Areas of Investment

(% selected)



Q8 - If a restaurant is considering investing to improve two aspects of business operations, on which areas would you MOST want them to focus? Select up to 2.

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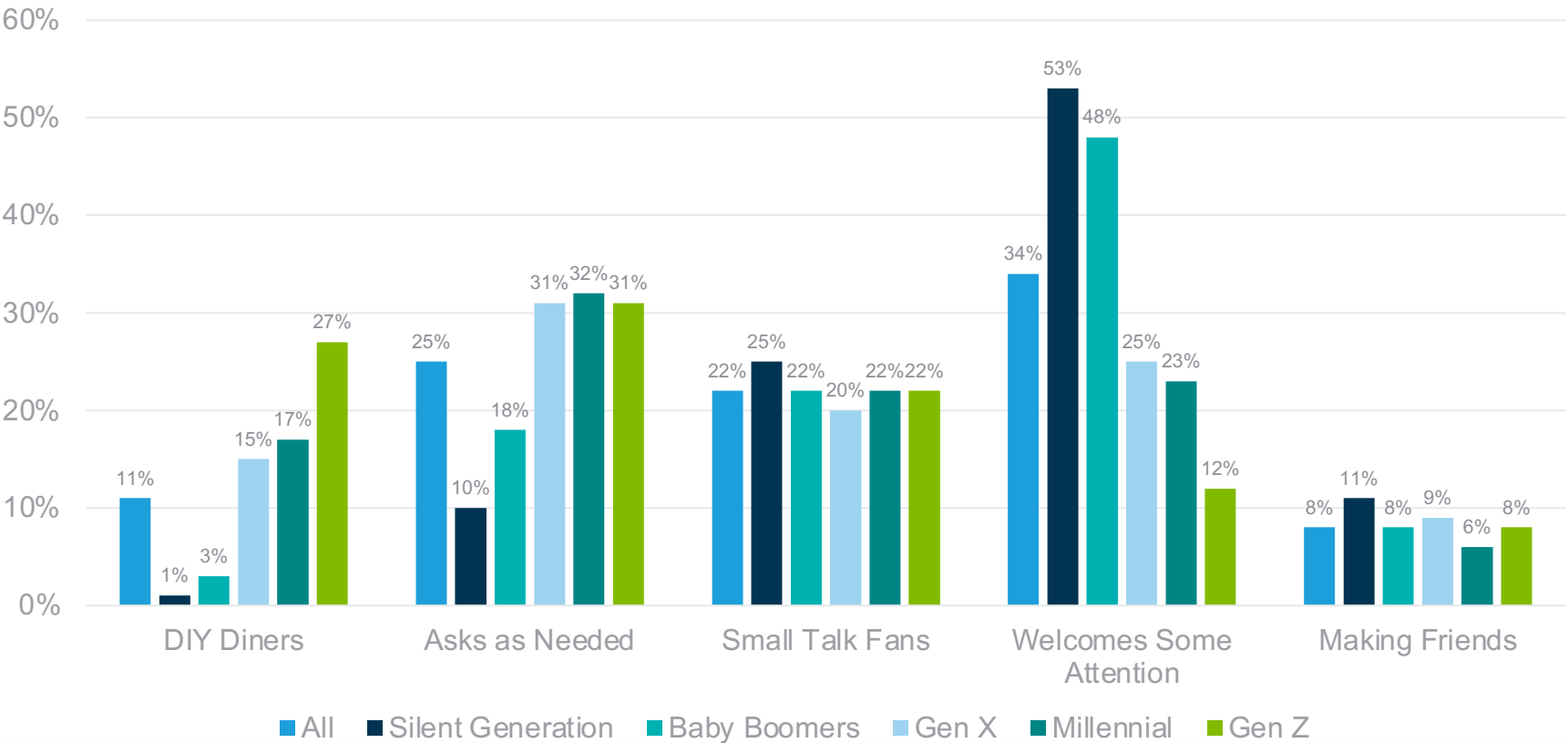




# TO ENGAGE OR NOT

Younger consumers are more likely to value DIY experiences and access to help when needed, while older consumers lean toward the desire for more interaction.

Guests' Mindsets Relative to Employee Interaction



- DIY Diners:** Self-serve everything (ordering, payment, etc.) and not have to talk with anyone.
- Asks as Needed:** I will ask for what I need. Otherwise, the less interaction, the better.
- Small Talk Fans:** I like a little small talk, a friendly exchange.
- Welcomes Some Attention:** I enjoy good customer service and a certain level of attention, but not to the point that it interrupts my own experience.
- Making Friends:** I prefer to be greeted and I enjoy conversation. It helps me feel appreciated and connected to the brand.

Q9 – Generally speaking (and knowing your sentiment might change based on that day’s mood or situation), which of the following best describes your preferred approach to interacting with restaurant employees?  
Base=1145



# PEOPLE MATTER

## DIY Diners 11%



1% Silent Generation  
3% Baby Boomers  
15% Gen X  
17% Millennial  
27% Gen Z

## Asks as Needed 25%



10% Silent Generation  
18% Baby Boomers  
31% Gen X  
32% Millennial  
31% Gen Z

## Small Talk Fans 22%



25% Silent Generation  
22% Baby Boomers  
20% Gen X  
22% Millennial  
22% Gen Z

## Welcomes Attention 34%



53% Silent Generation  
48% Baby Boomers  
25% Gen X  
23% Millennial  
12% Gen Z

## Making Friends 8%



11% Silent Generation  
8% Baby Boomers  
9% Gen X  
6% Millennial  
8% Gen Z

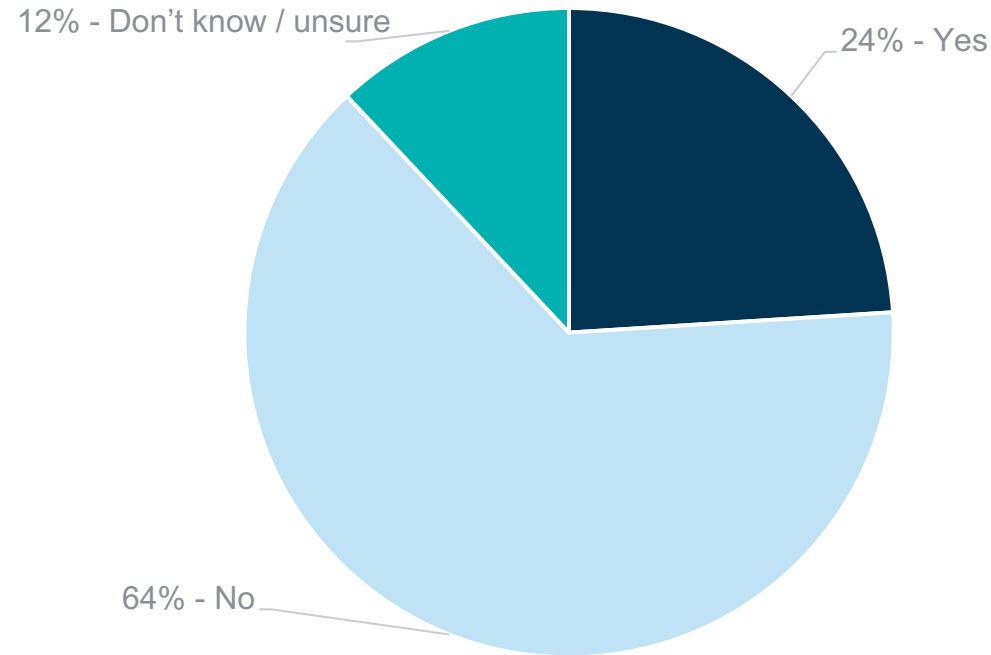
Q9 – Generally speaking (and knowing your sentiment might change based on that day’s mood or situation), which of the following best describes your preferred approach to interacting with restaurant employees?  
Base=1145



# IMPACT OF COVID-19 ON MINDSET RELATIVE TO STAFF INTERACTION

Asked whether their experience with COVID-19 had any impact on how much they prefer to interact with restaurant staff, nearly two-thirds (64%) said it had no impact, while one-fourth (24%) indicated a shift in perspective. This could indicate that attitudes are not likely to change drastically once COVID-19 is under control.

## Impact of COVID-19 on Mindset Relative to Employee Interaction?



Q10 – Would your response [regarding mindset] have been different prior to any experience with COVID-19 in the US?

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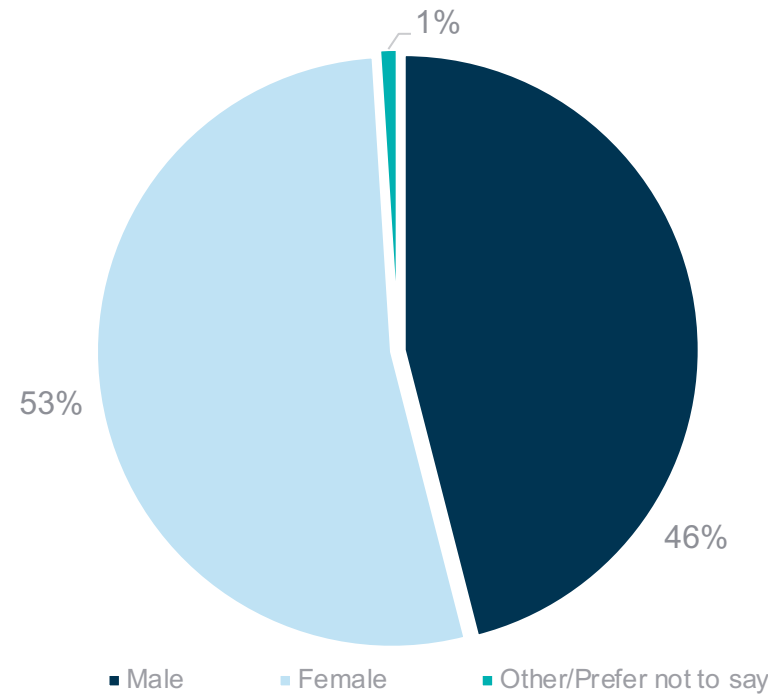
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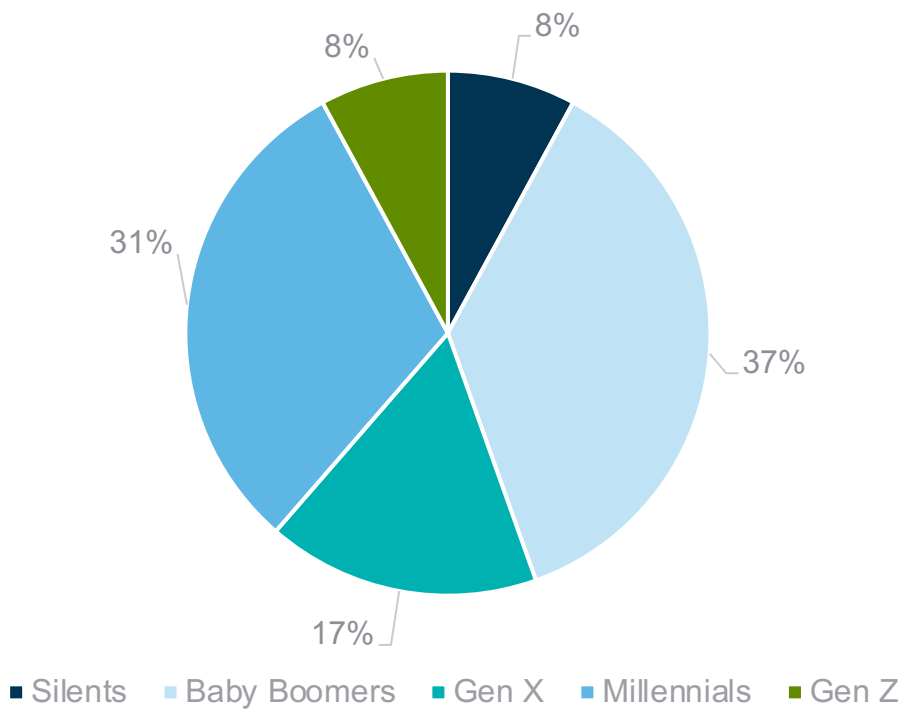
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# DEMOGRAPHICS

Gender



Age / Generational Breakdown



# DEMOGRAPHICS

Geographical Region Breakdown

