

# Changes in Consumer Habits:

Looking back on  
the last 12  
months for  
restaurants and  
food service  
establishments



**Order Confirmed.**  
Your food is on the way

🕒 22 mins



# Who we are

At Intouch Insight, we provide experiential and operational expertise to businesses around the world. We specialize in supporting multi-location businesses as they deliver on their brand promise. Leveraging our automated customer experience platform, brands are able to produce the high-value actions that **earn customers for life**.

## Learn more:

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**Disclaimer:** The views expressed in this study are representative of the survey data collected. Please continue to follow the advice of medical professionals and your regional government officials for recommendations around health and safety protocol.



# March

*Sunday Monday Tuesday Wednesday Thursday Friday Saturday*

24	25	26	27	28	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

## Introduction & Update

It has been just over a year since the first lock-down measures were experienced due to the Covid-19 pandemic. Business across all sectors have been affected, but the food services industry has been on the front line of change.

To understand how consumer expectations were changing, we leveraged our customer experience intelligence platform, LiaCX®, and survey capabilities to gather feedback through two surveys conducted in **May 2020** and then again in **October 2020**.

In order to continue understanding the long-term effects and trends on the restaurant sector, we launched our **3rd survey, reaching over 1200 survey respondents**

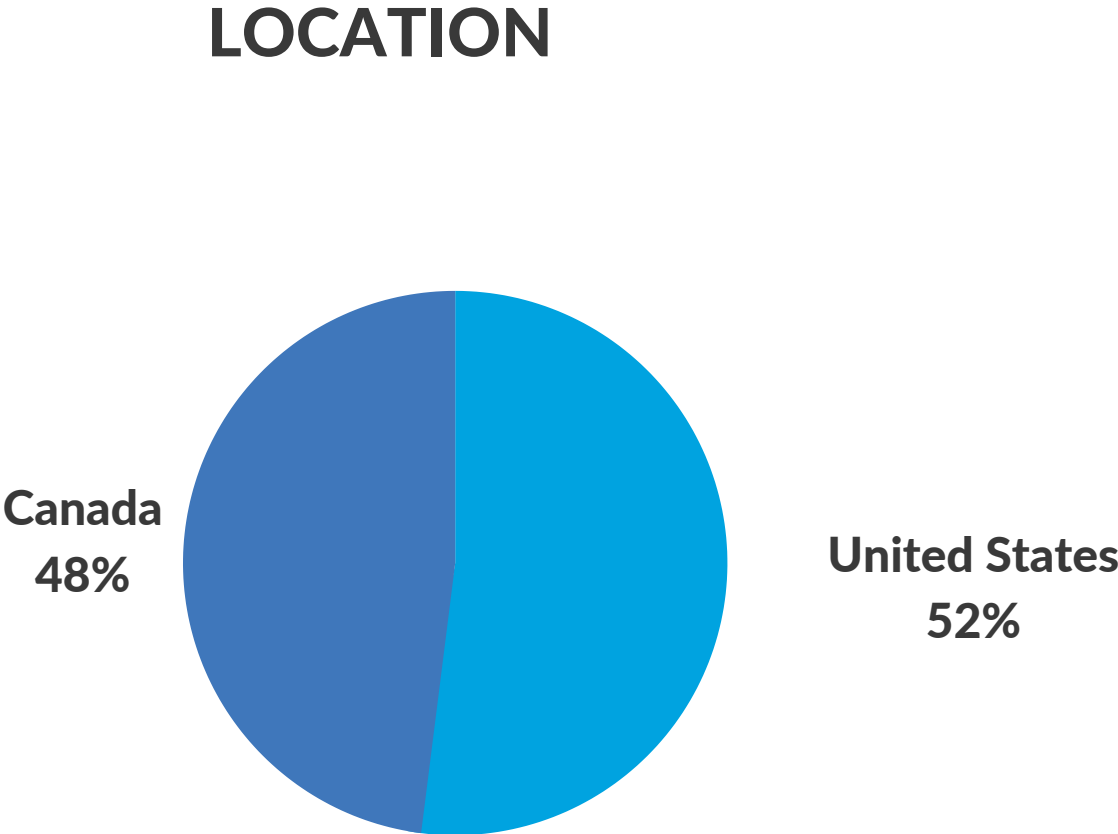
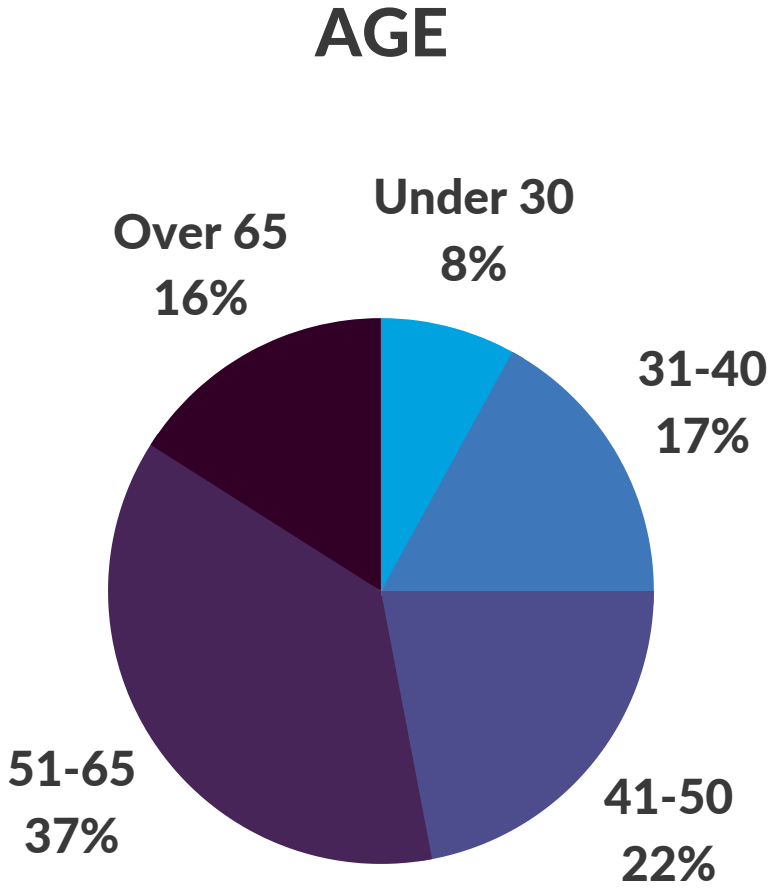
In order to better understand how things have changed and continue to deliver useful insights to businesses across the food services industry, we explored some new areas around customer experience and feedback.

**What's covered in the report:**

- What consumers expect from businesses,
- How their habits are solidifying,
- Where businesses can focus their efforts to drive the greatest impact.



# Survey Demographics





# Initial findings

In May 2020, when asked what aspects were considered extremely important when making a decision to order prepared food, **cleanliness**, **quality of food** and **quality of service** topped the list.

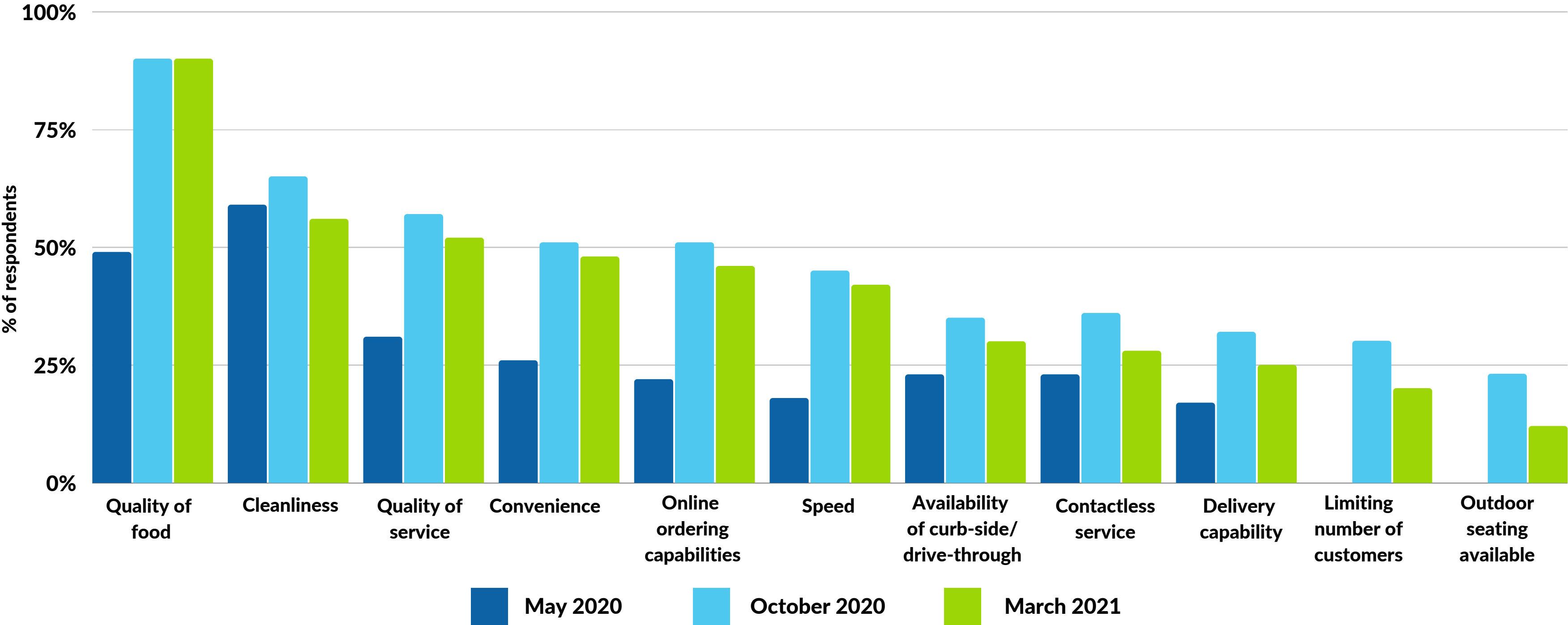
October 2020 the same top three items were rated as extremely important, but **quality of food took the top spot** by a significant margin.

This trend continues in the latest survey results with **very similar results** to last fall.





Which of the following aspects do you consider **extremely important** when making a decision to order prepared food?

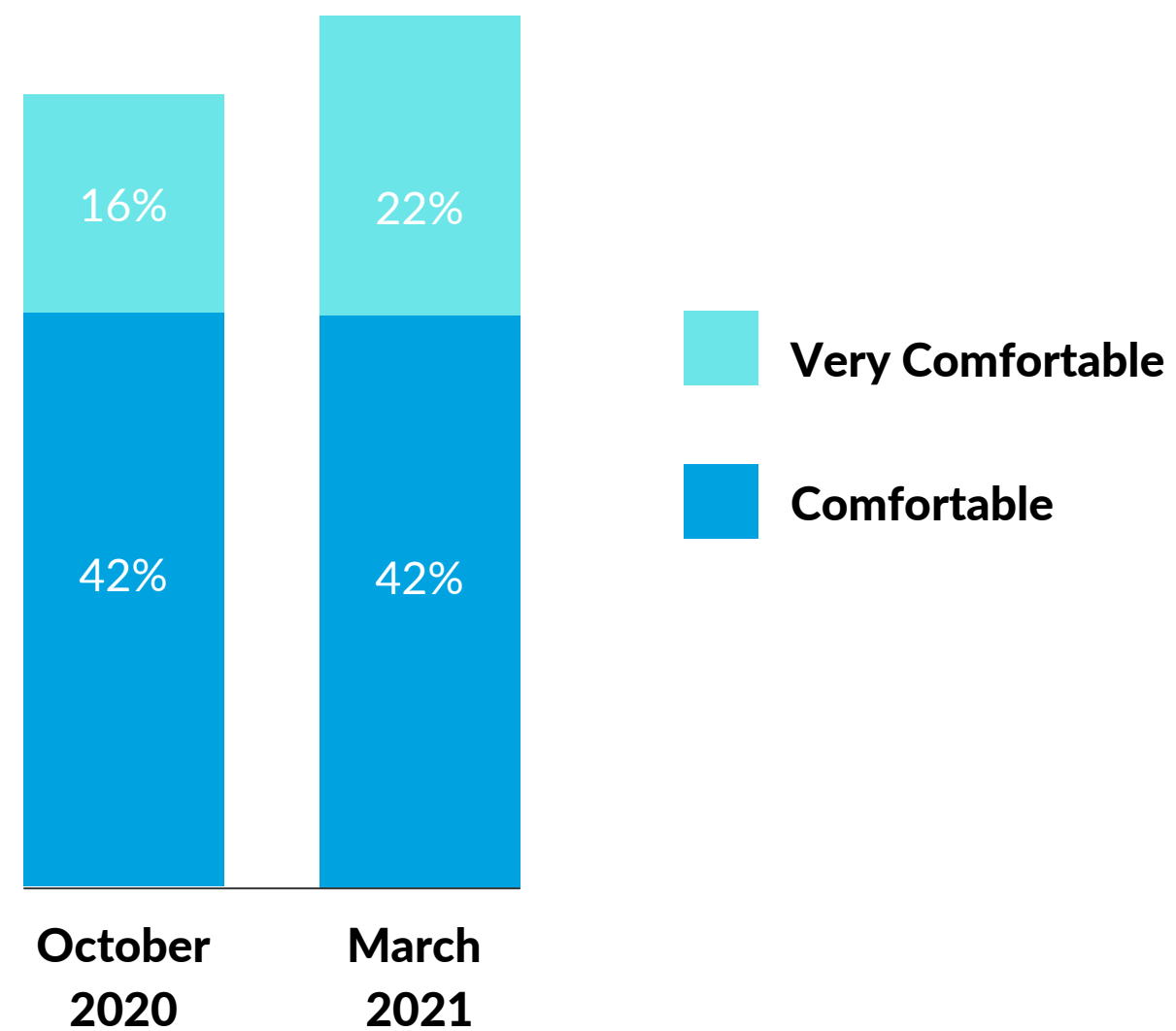


Note: As businesses experienced rapid change early on in the pandemic, new items were added to this question between May and October 2020, therefore no data was collected in May 2020 for certain aspects displayed above.



This trend is further reinforced by a 6% increase in the number of people reporting that they feel **comfortable or very comfortable** entering a restaurant, since last fall.

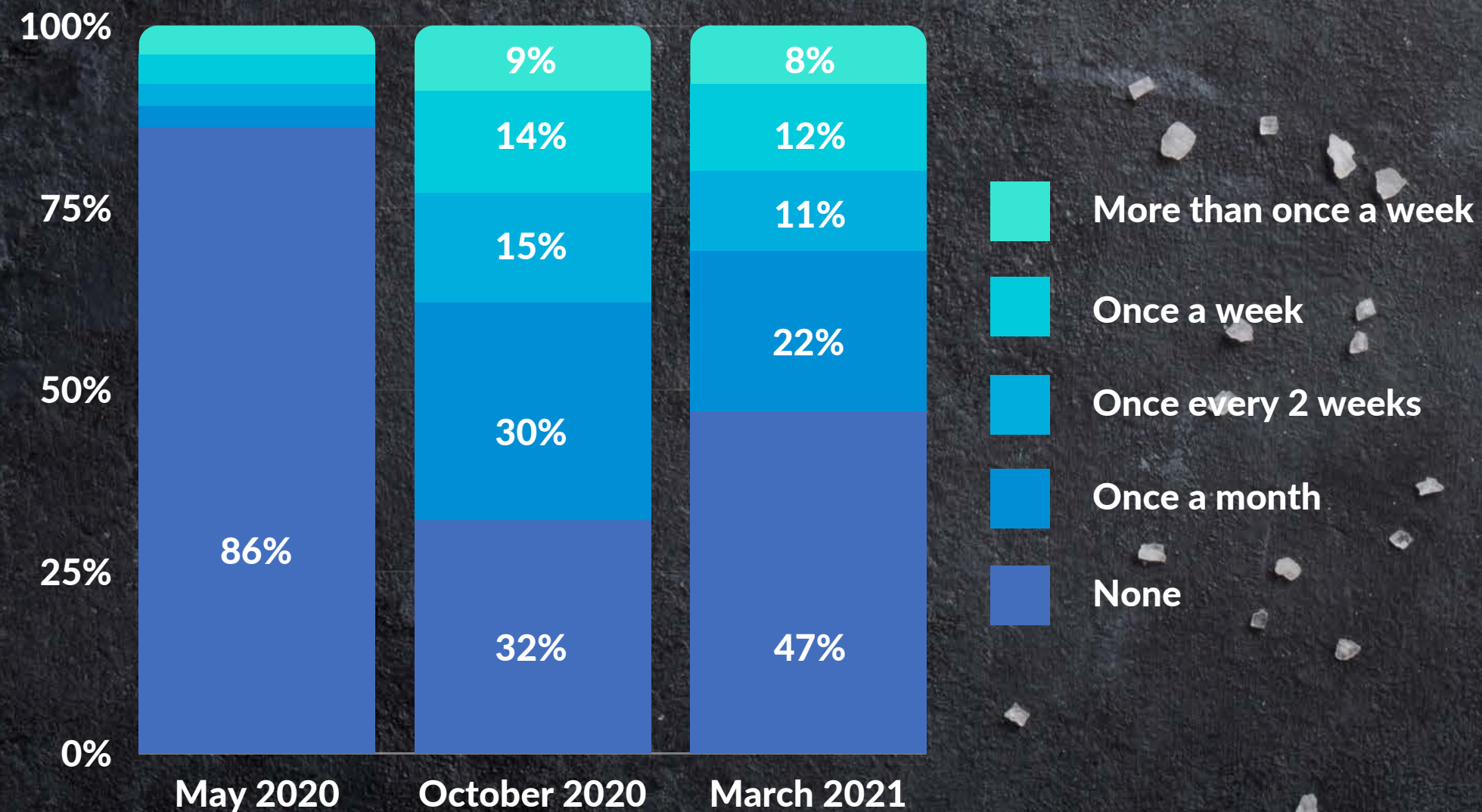
Percentage of respondents who reported feeling comfortable or very comfortable entering a restaurant.





With lock-down measures returning in many jurisdictions, we have seen a **drop in dining-in at restaurants**, but not to the same extent that was experienced almost a year ago.

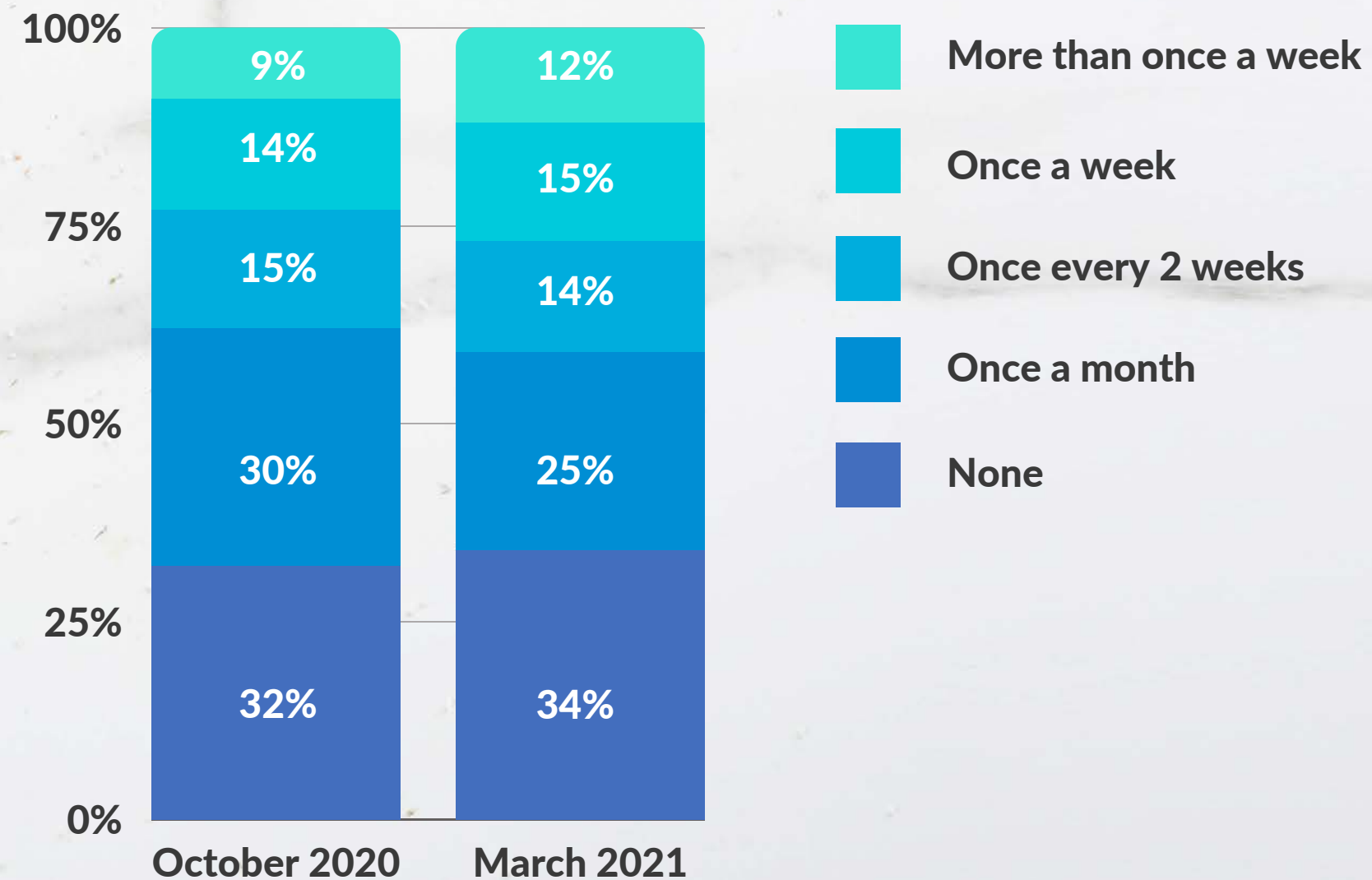
Percentage of respondents reporting the frequency of trips made to dine-in at a restaurant





To further understand the real impact of the lock-downs, we compared the data for respondents who reported **no lock-downs in their area**, and this subset of the latest results are very comparable to last October.

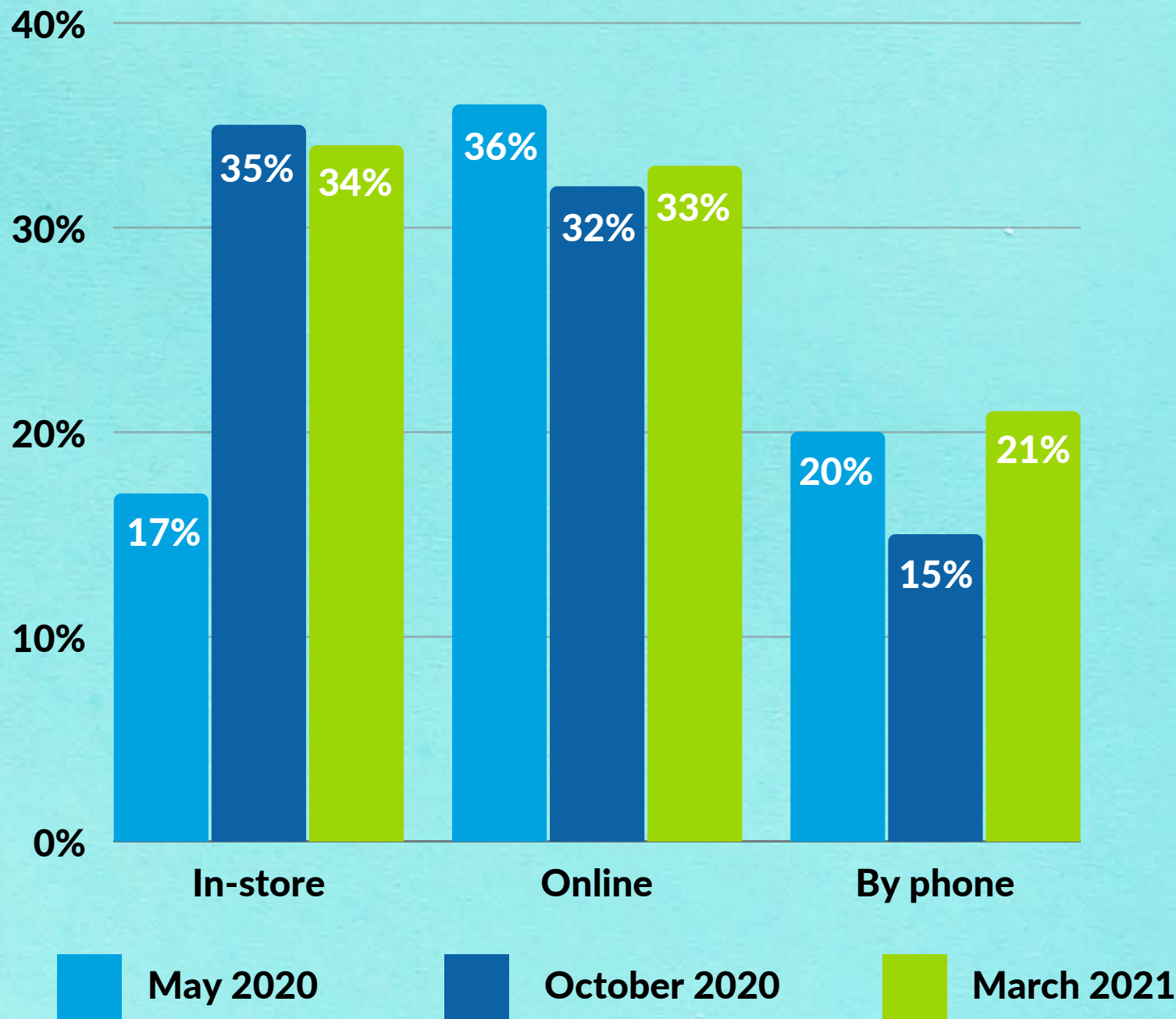
Percentage of respondents reporting the frequency of trips made to dine-in at a restaurant - No recent lock-downs reported





And when it comes to how people are **purchasing prepared food**, we have seen an **increase of in-store purchases over the last 12 months**, but alternative methods continue to be very popular.

Percentage of respondents reporting the method most frequently used to purchase prepared food





## Key findings

The food services landscape has been forever changed. With ever-evolving rules and regulations, restaurants have innovated and consumers have taken advantage of new ways of engaging with the establishments they love.

In this study, we will provide insights into the long-lasting effects of those changes, and how businesses can meet and exceed their customer expectations moving forward.





If this is as far as you go in the study, here's what you absolutely need to know:

- **Key Finding #1: Comfort and safety have become established expectations**
  - Quality of food is back to being king, but the heightened expectations around cleanliness may be here to stay. This doesn't just apply to inside the restaurant but for employees working take-out and curbside as well!
  - Respondents continue to reinforce their need for safety as a top concern, ranking ensuring customers wear masks and improved cleanliness as the number one and two change they want to see businesses make.
- **Key Finding #2: Invest in connecting directly with your customers**
  - Respondents continue to report an increase in the number of online purchases made over the last year.
  - Survey data shows a preference towards ordering prepared food for pick-up over delivery.
  - Respondents from all three surveys reported a slightly higher frequency of ordering for delivery direct from the restaurant, rather than use a third-party delivery service.
- **Key Finding #3: Businesses still have work to do when it comes to asking for feedback**
  - Across all types of service interactions, the survey data shows that businesses are not asking for feedback consistently.
  - Respondents report that when asked for feedback, they do provide it the majority of the time.
  - The large majority of respondents who offer unsolicited feedback do so by posting online.

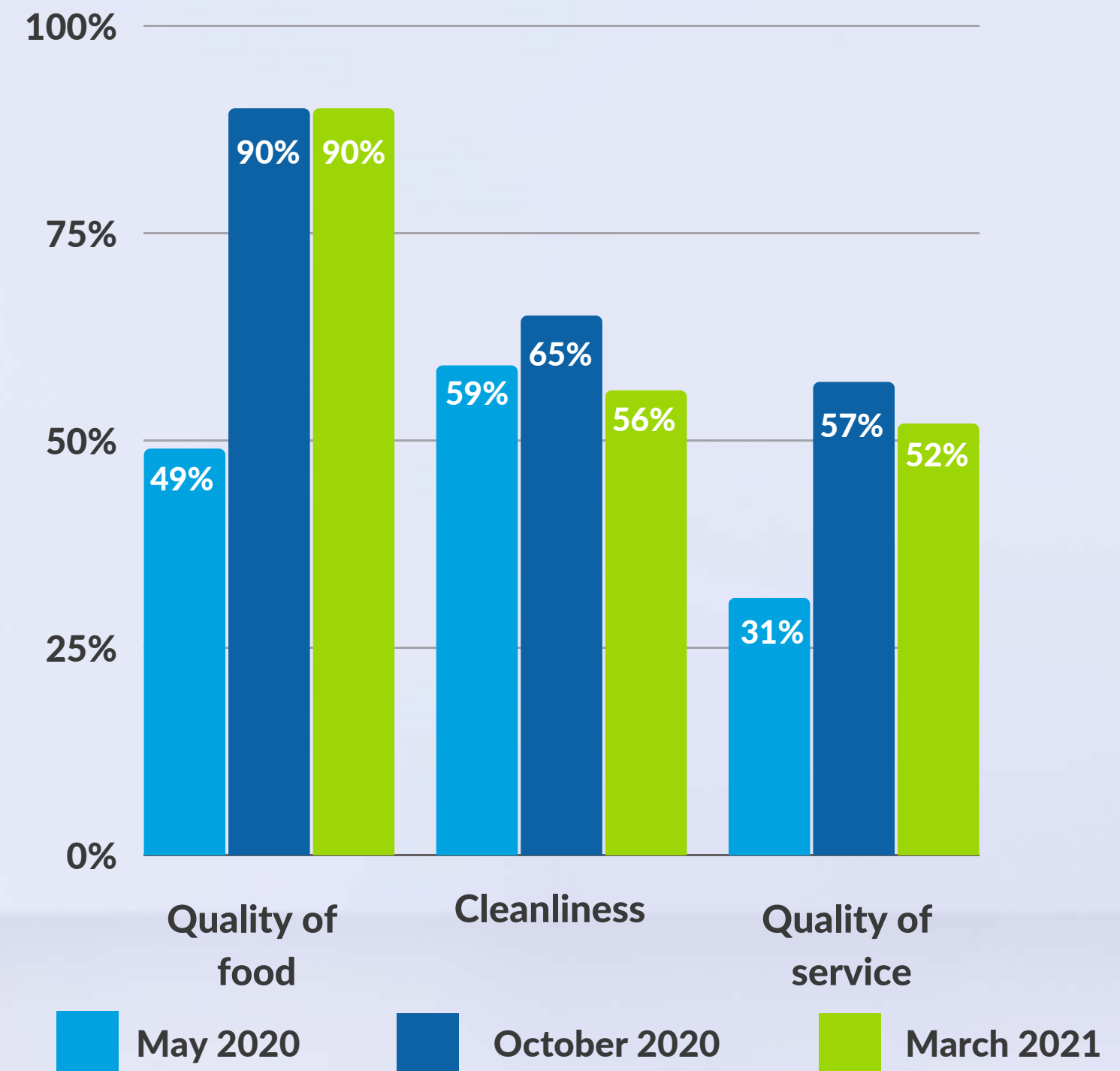


**Key finding #1**  
**Comfort and**  
**safety have**  
**become**  
**established**  
**expectations**



Similar to pre-Covid consumer behaviors, over this past year **quality of food and service** have risen back to the top in terms of key aspects rated most important when making a decision to order prepared food; but the **importance of cleanliness** has remained steady.

Percentage of respondents reporting aspects they consider extremely important when making a decision to order prepared food?





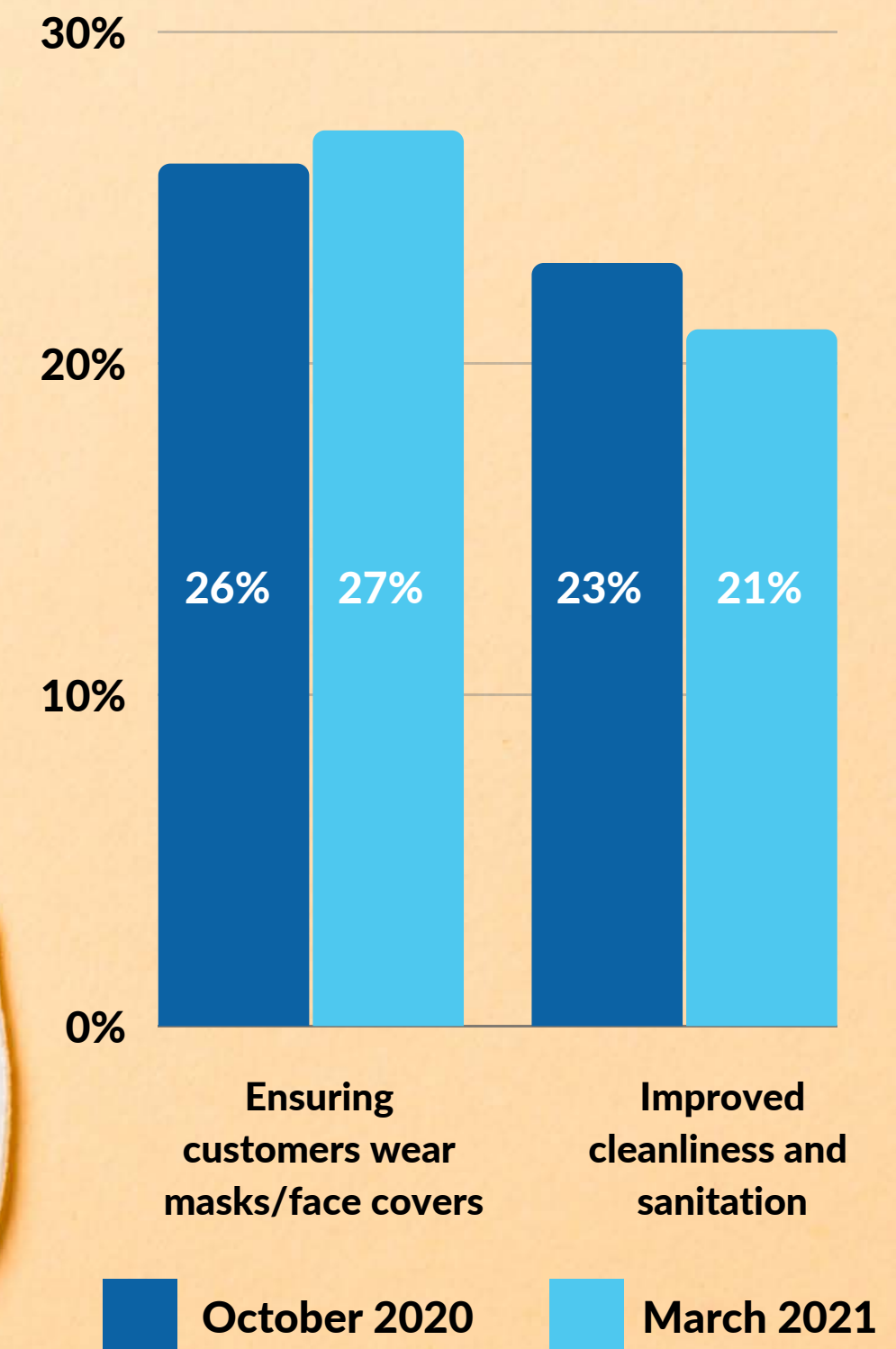
There have been minimal changes in the results from our two latest surveys to the question: **What is the number one change you want to see businesses make?**

Ensuring customers wear masks and improved cleanliness remain at the top of the list.

This reinforces consumers continued attention to safety and cleanliness practices.

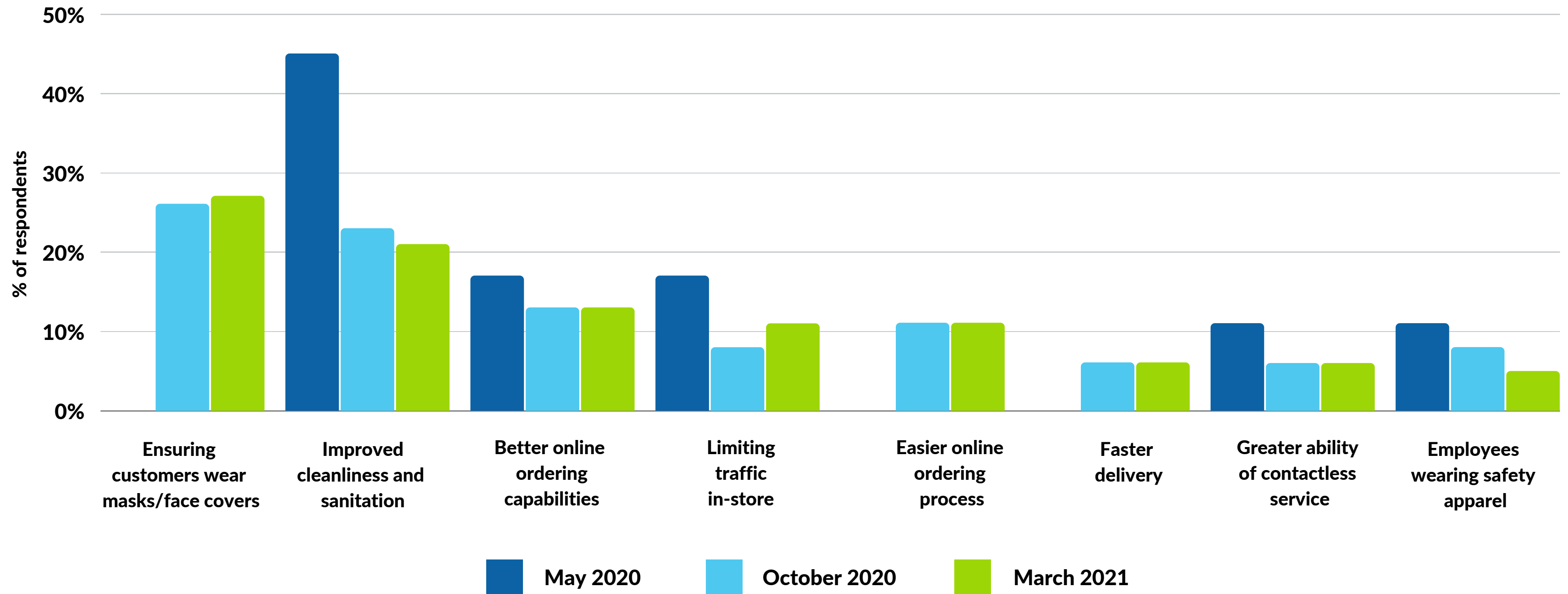
*See full results of this question on the next page.*

Percentage of respondents reporting the number one change they want to see businesses make





# What is the **number one change** you want to see businesses make?



Note: As businesses experienced rapid change early on in the pandemic, new items were added to this question between May and October 2020, therefore no data was collected in May 2020 for certain aspects displayed above.

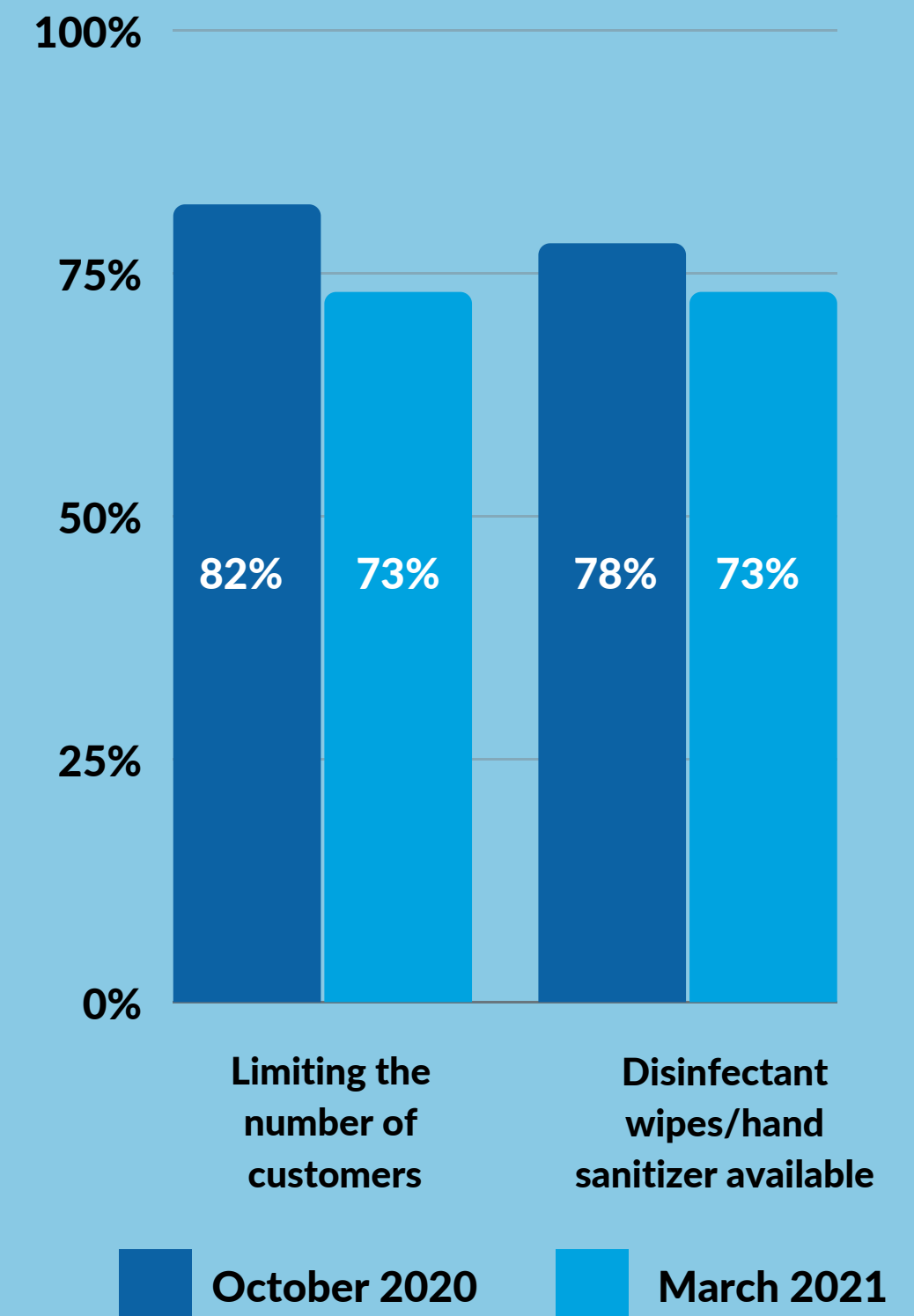


When asked, **What aspects make you feel most comfortable**, the same two answers rose to the top.

In the most recent survey, **limiting the number of customers in store** took first place as a key driver of comfort, and **availability of disinfectant wipes / hand sanitizer** came a very close second.

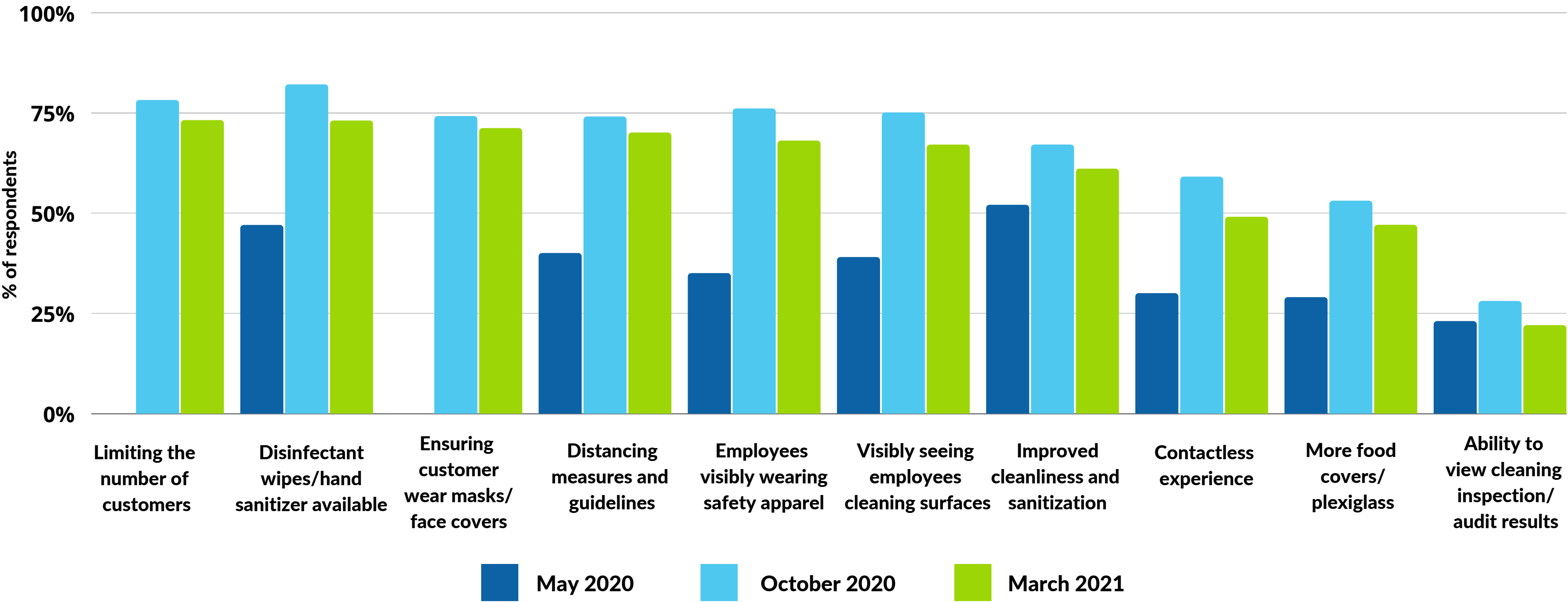
*See full results of this question on the next page.*

Percentage of respondents reporting aspects that make them feel the most comfortable when entering a restaurant





# Which of the following aspects would make you feel more comfortable when entering a physical store or restaurant?



Note: As businesses experienced rapid change early on in the pandemic, new items were added to this question between May and October 2020, therefore no data was collected in May 2020 for certain aspects displayed above.




Key finding #2

Invest in connecting directly  
with your customers





A person wearing a white button-down shirt is holding a brown cardboard tray with two disposable coffee cups. They are also holding a brown paper shopping bag. The background is a solid light blue.

As we saw in our initial findings, there have been major fluctuations in how consumers are engaging with food service establishments.

- Reported rates of **dining-in** have fluctuated in conjunction with local lock-down measures,
- **In-store purchases** of prepared food had steadily increased, and
- Heavy reliance on **online and phone orders** has **stabilized** since May 2020, with consistent adoption reported in the two latest surveys.

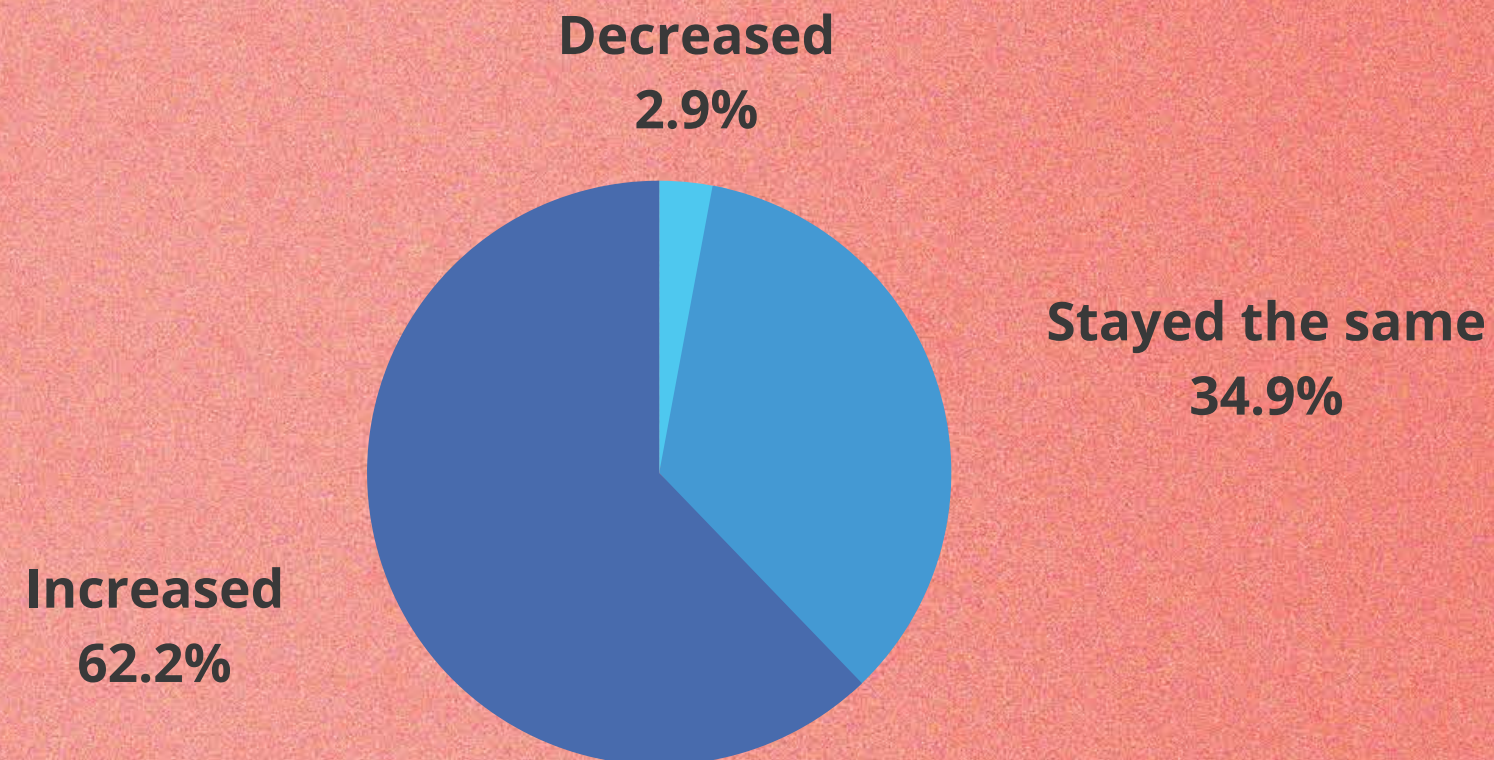
Let's dive into those habits!



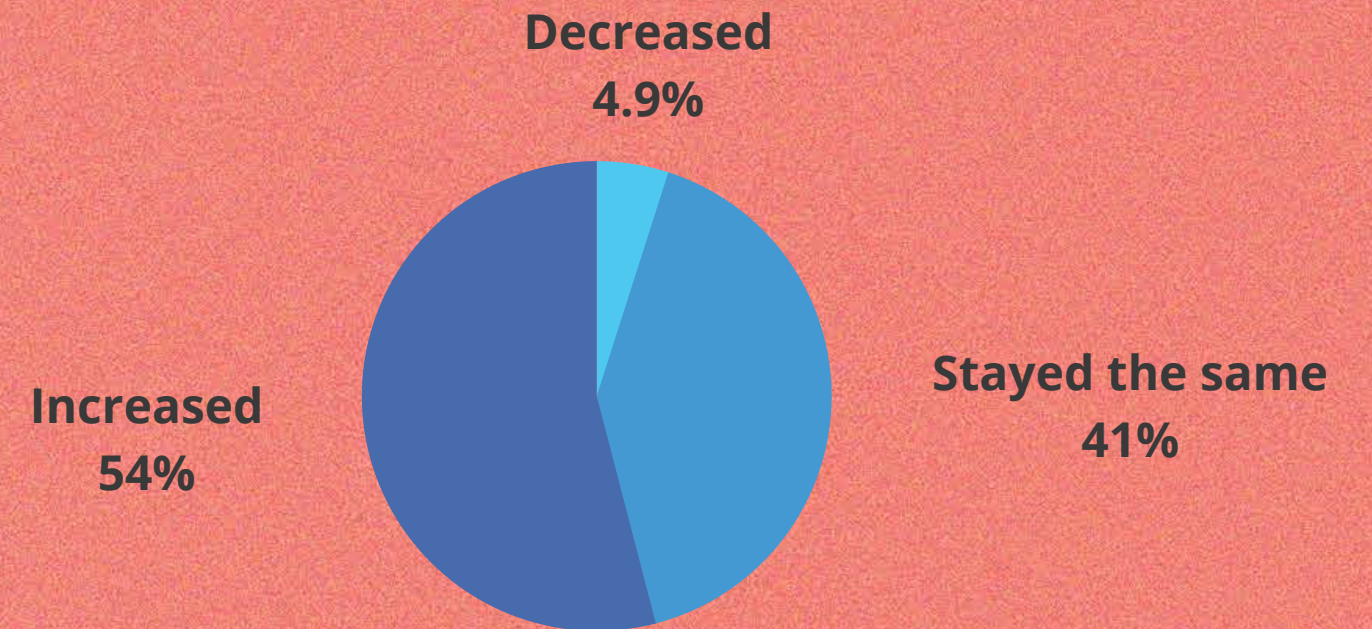
**62% of respondents** report an increase in the number of online purchases made over the last year, compared to **54% last fall** and **51% the previous spring**, and there is no exception for the food services industry!

Has the number of online purchases you have made increased, decreased or stayed the same ?

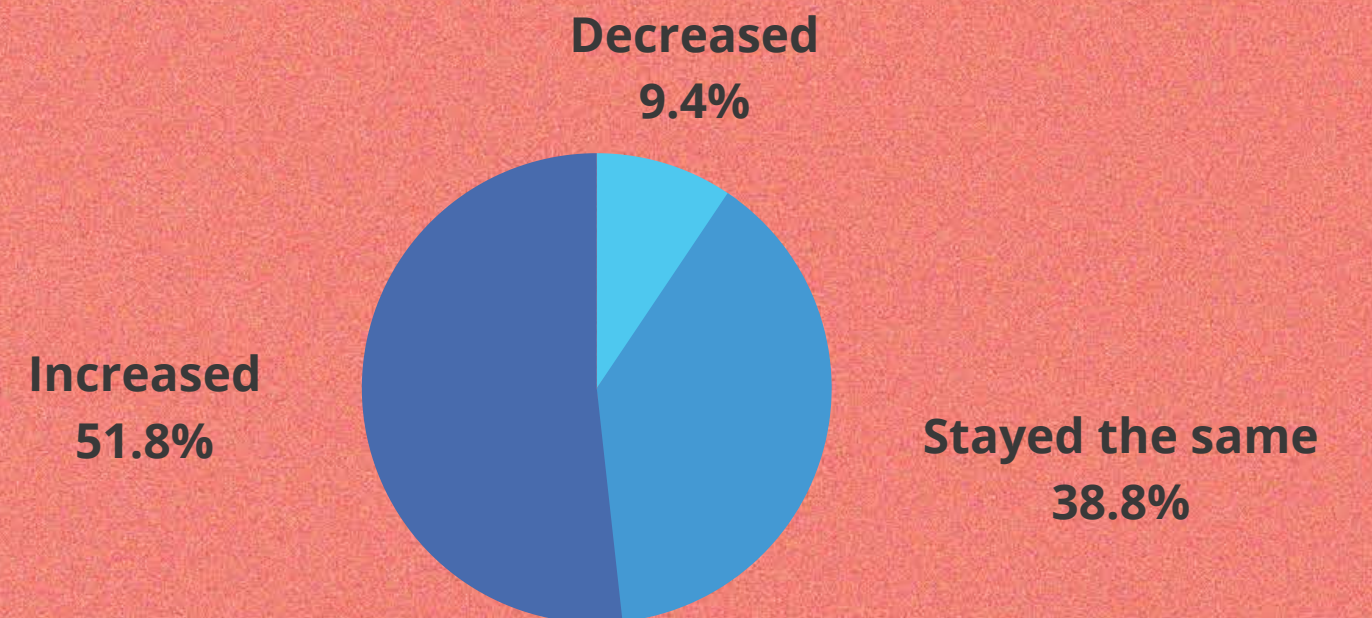
March 2021



October 2020



May 2020



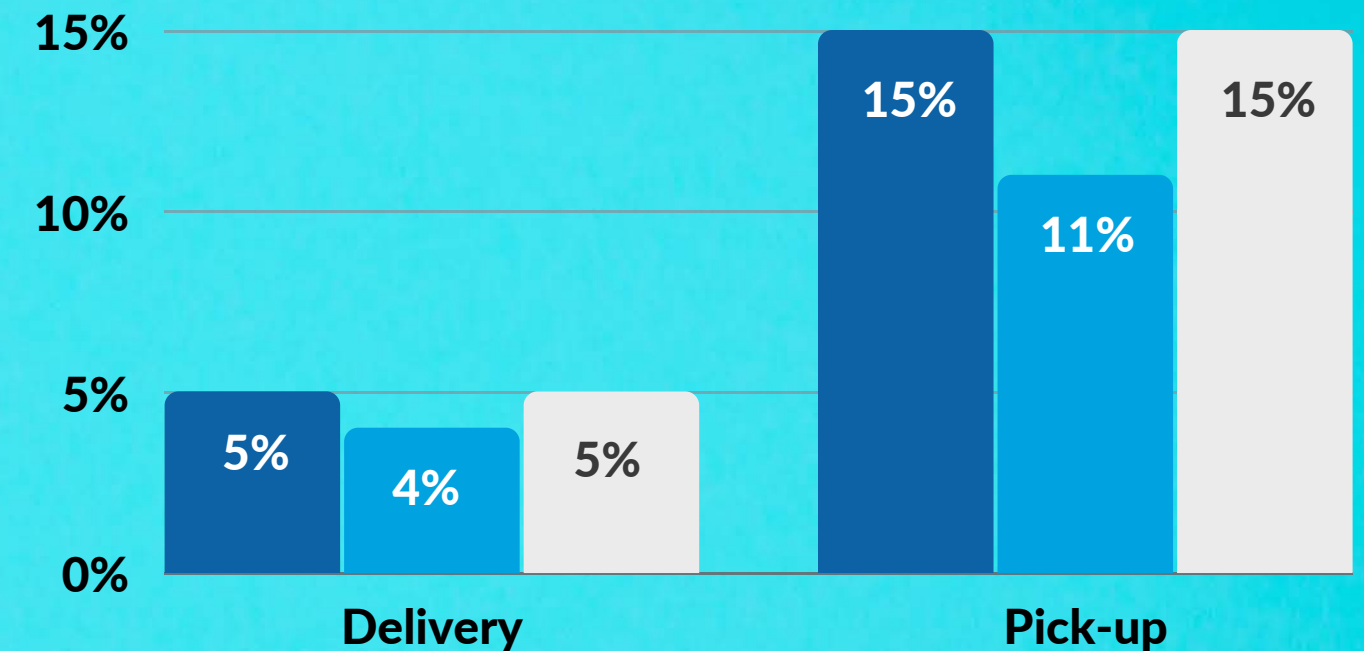


Survey data shows a **preference towards ordering prepared food for pick-up** over delivery, regardless of how those orders are being placed.

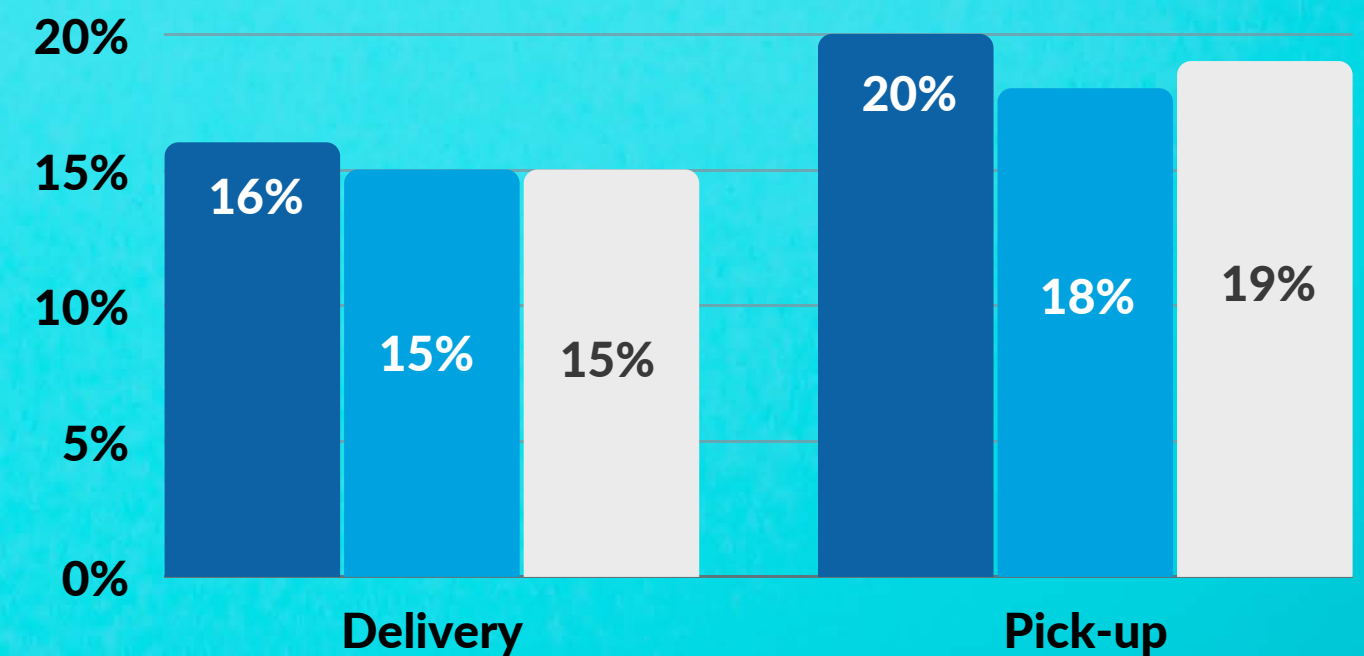
By phone



Percentage of respondents reporting the method most frequently used to purchase prepared food



Online



May 2020      October 2020      March 2021





**TAKE OUT  
FOOD**

**Take-out** has the highest overall adoption in terms of frequency of visits, but **drive-thru** has the highest reported frequency, with 23% of respondents from our latest survey reporting using the drive-thru more than once per week, compared to 15% for take-out.

*See full results of this question in two pages.*



**Curb-side pickup is the least frequently used method**, with 56% of respondents in both March 2021 and October 2020 reporting having not used that method at all.

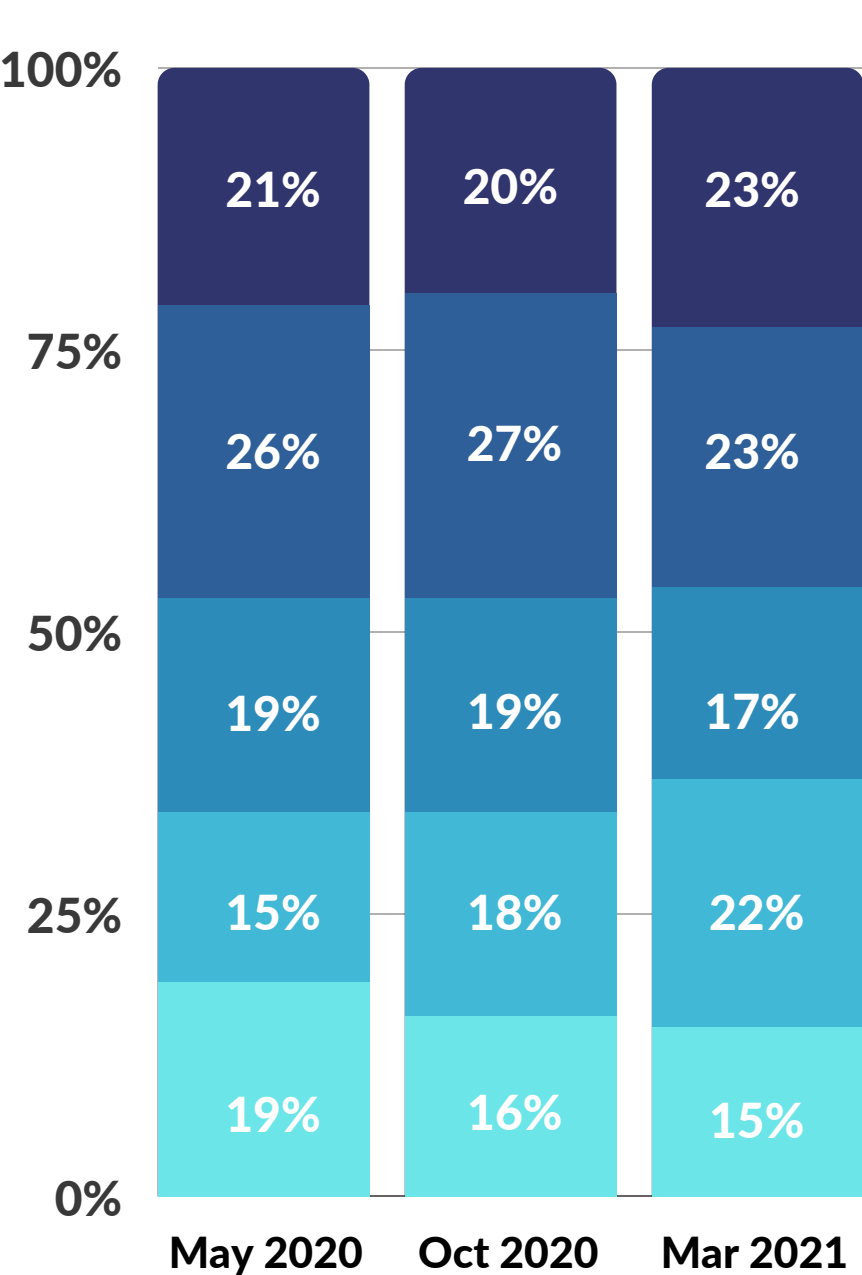
*See full results of this question on next page.*



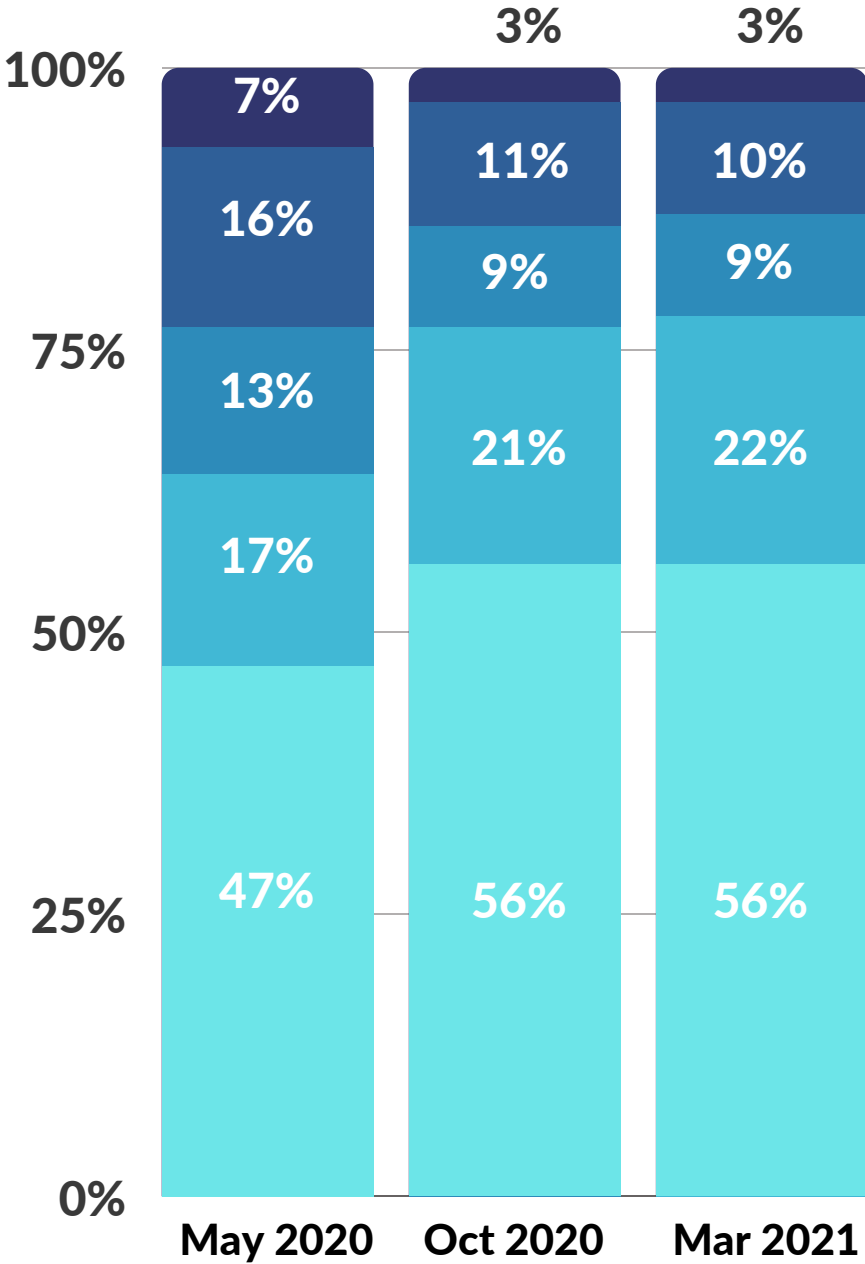


# Pick-up: Drive-thru vs Curb-side vs Take-out

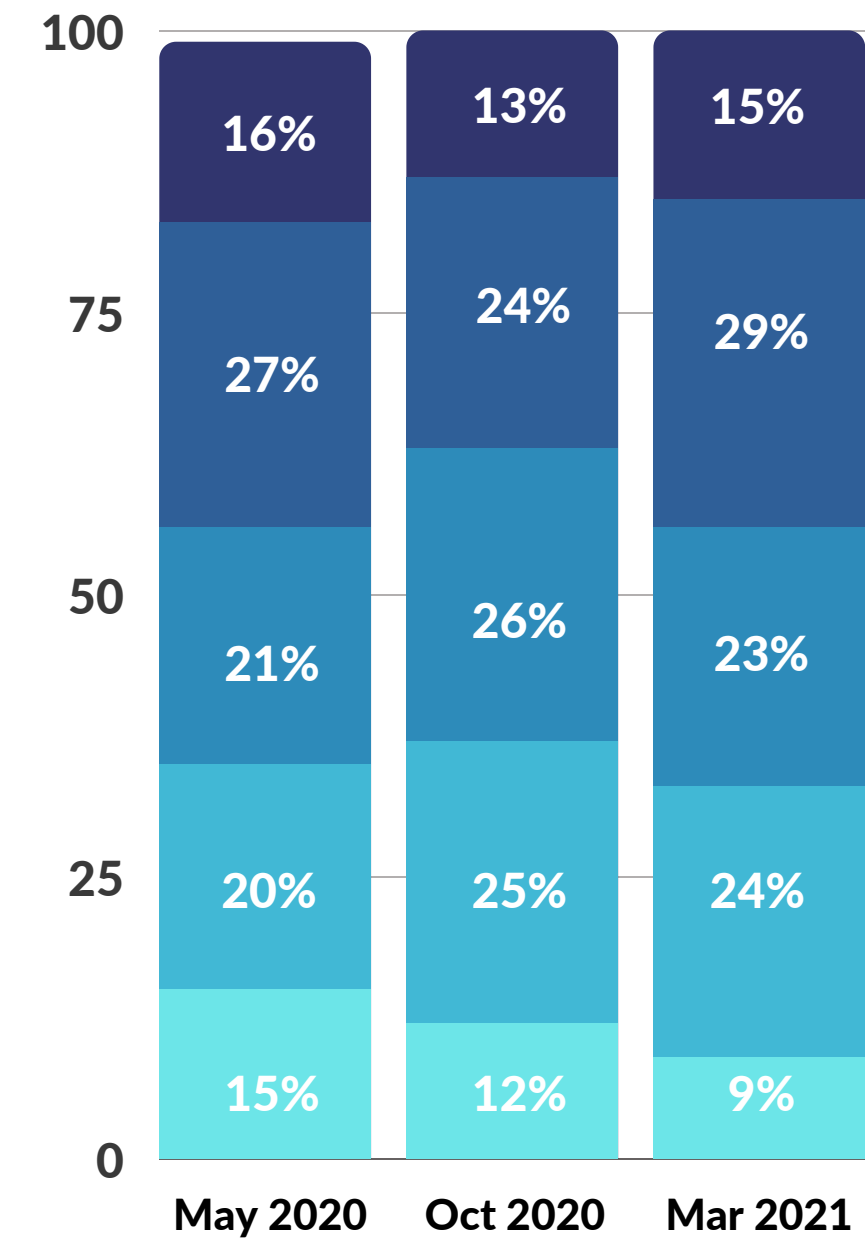
Percentage of respondents reporting the frequency of drive-thru pick-up orders



Percentage of respondents reporting the frequency of curb-side pick-up orders



Percentage of respondents reporting the frequency of take-out pick-up orders



More than once a week    Once a week    Once every 2 weeks    Once a month    None



Respondents from all three surveys reported **slightly higher frequency of ordering for delivery direct from the restaurant.**

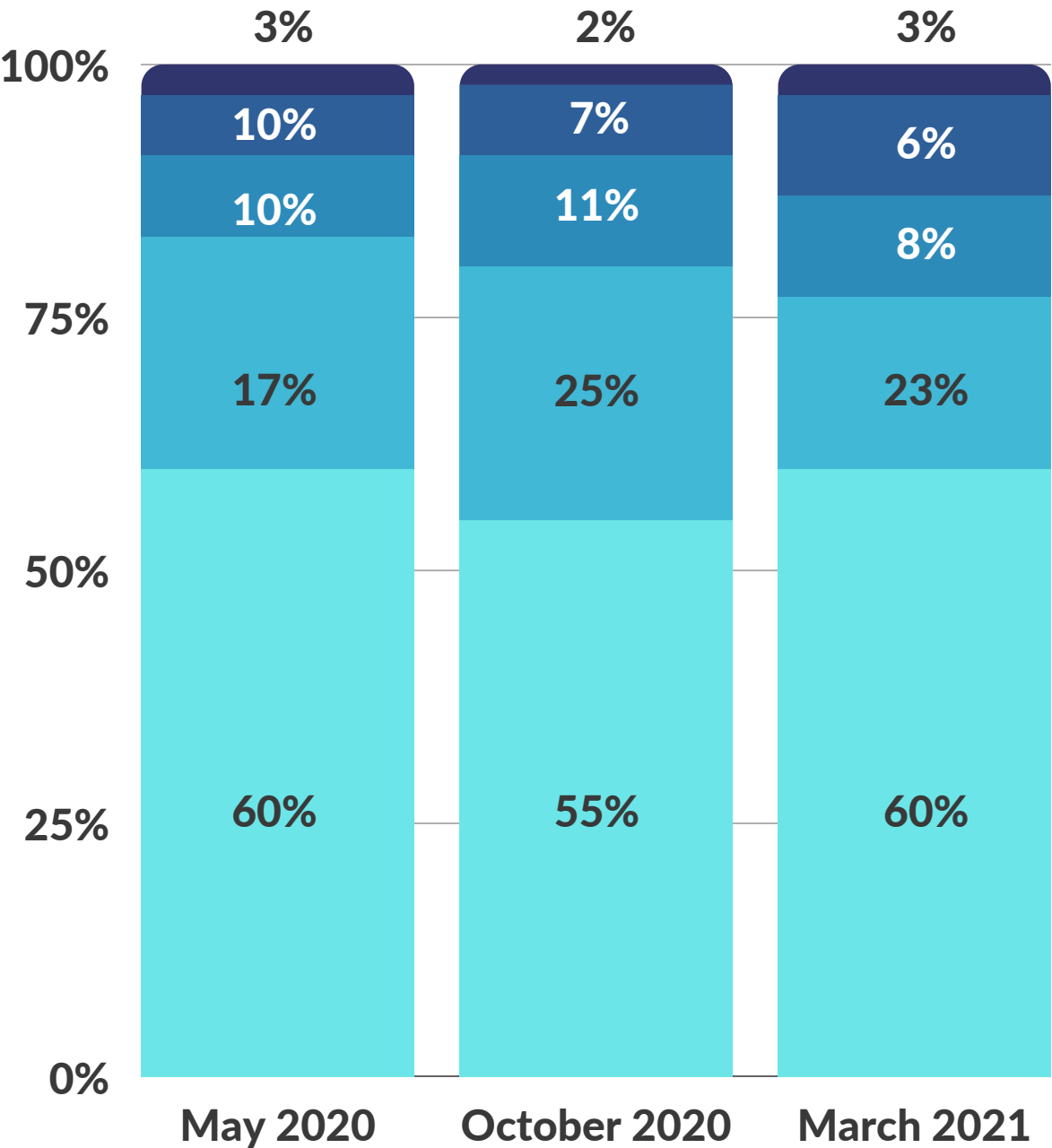
But if you do not have an established delivery service in place, using a 3rd party service is still a viable option since adoption rates aren't markedly different.



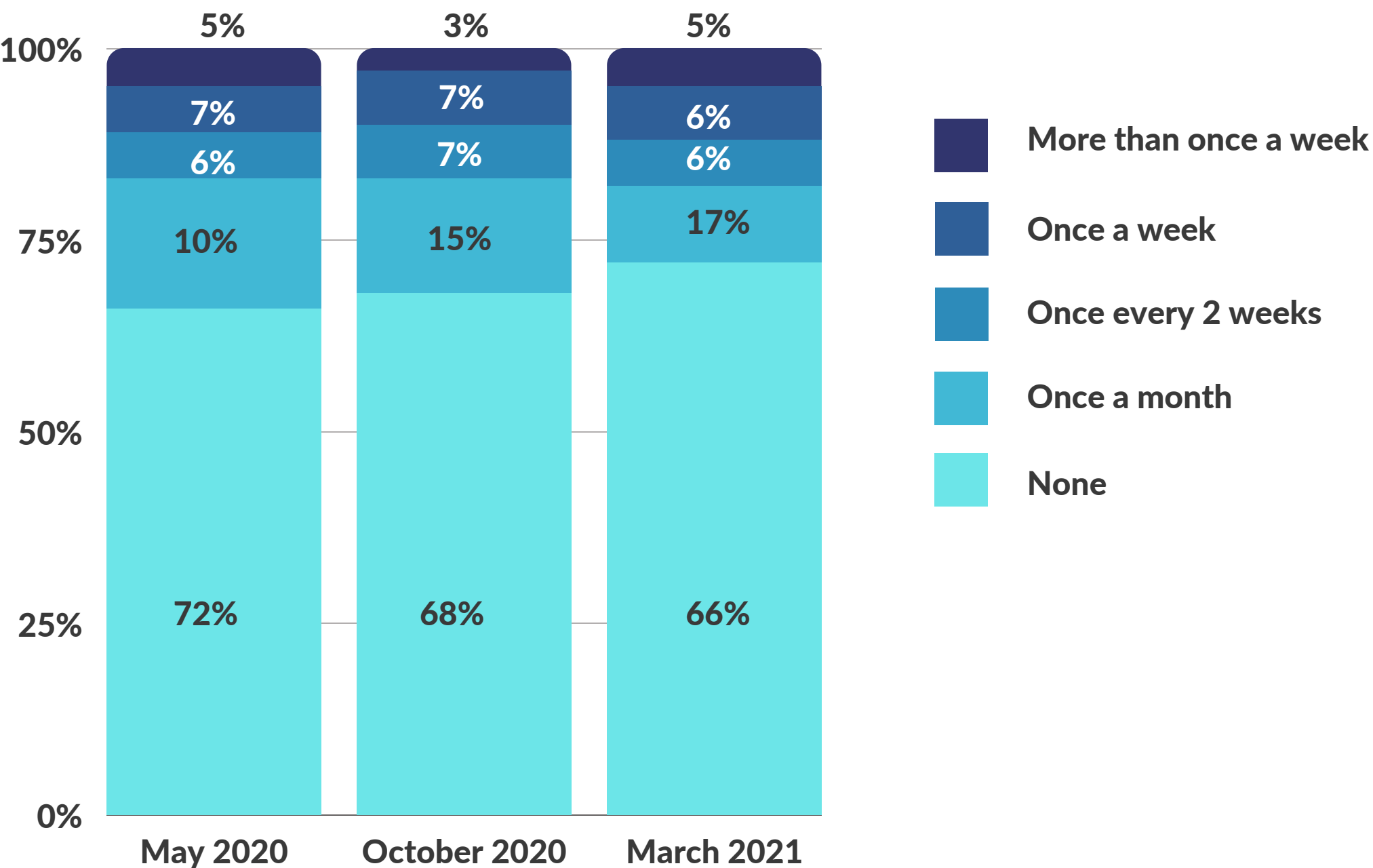


# Delivery: Direct from restaurant vs 3rd party delivery service

Percentage of respondents reporting the frequency of delivery orders placed direct from restaurant

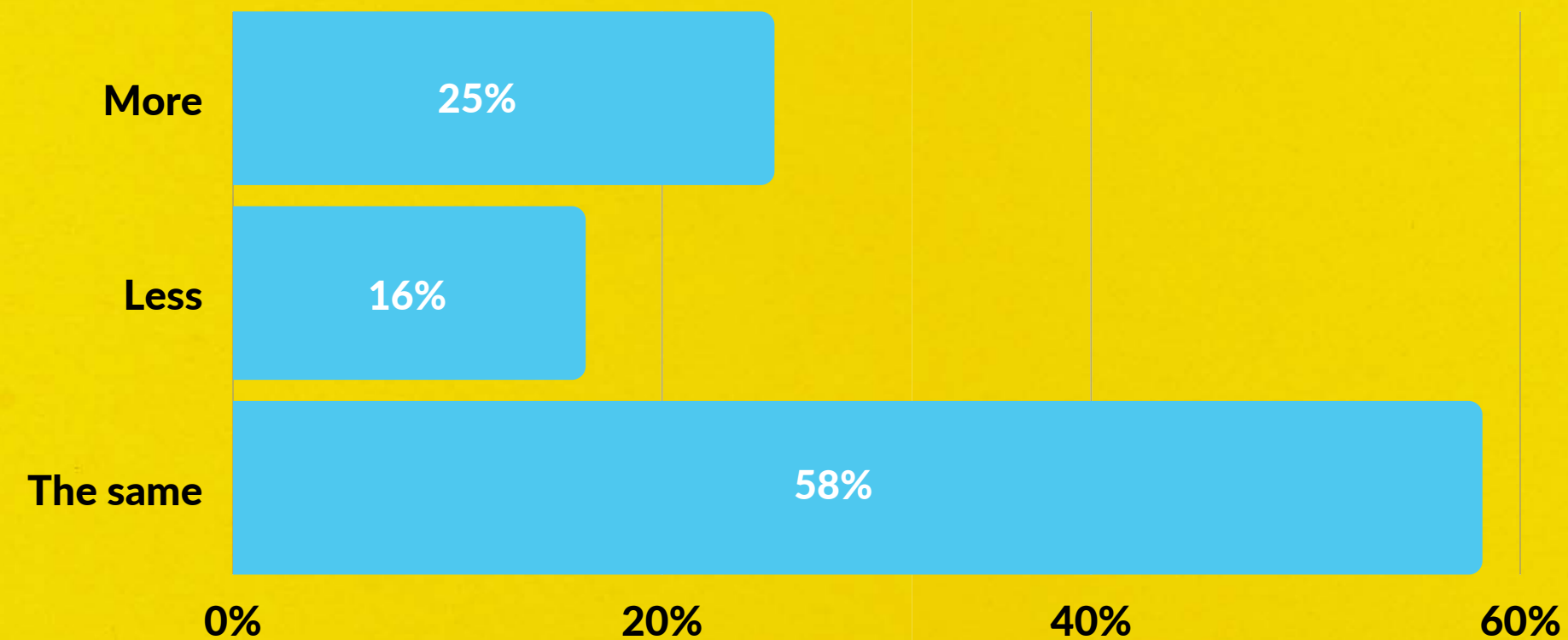


Percentage of respondents reporting the frequency of delivery orders placed using a food delivery service





Interestingly, in this latest survey, **25%** of respondents say that they **buy local** more than before the pandemic.





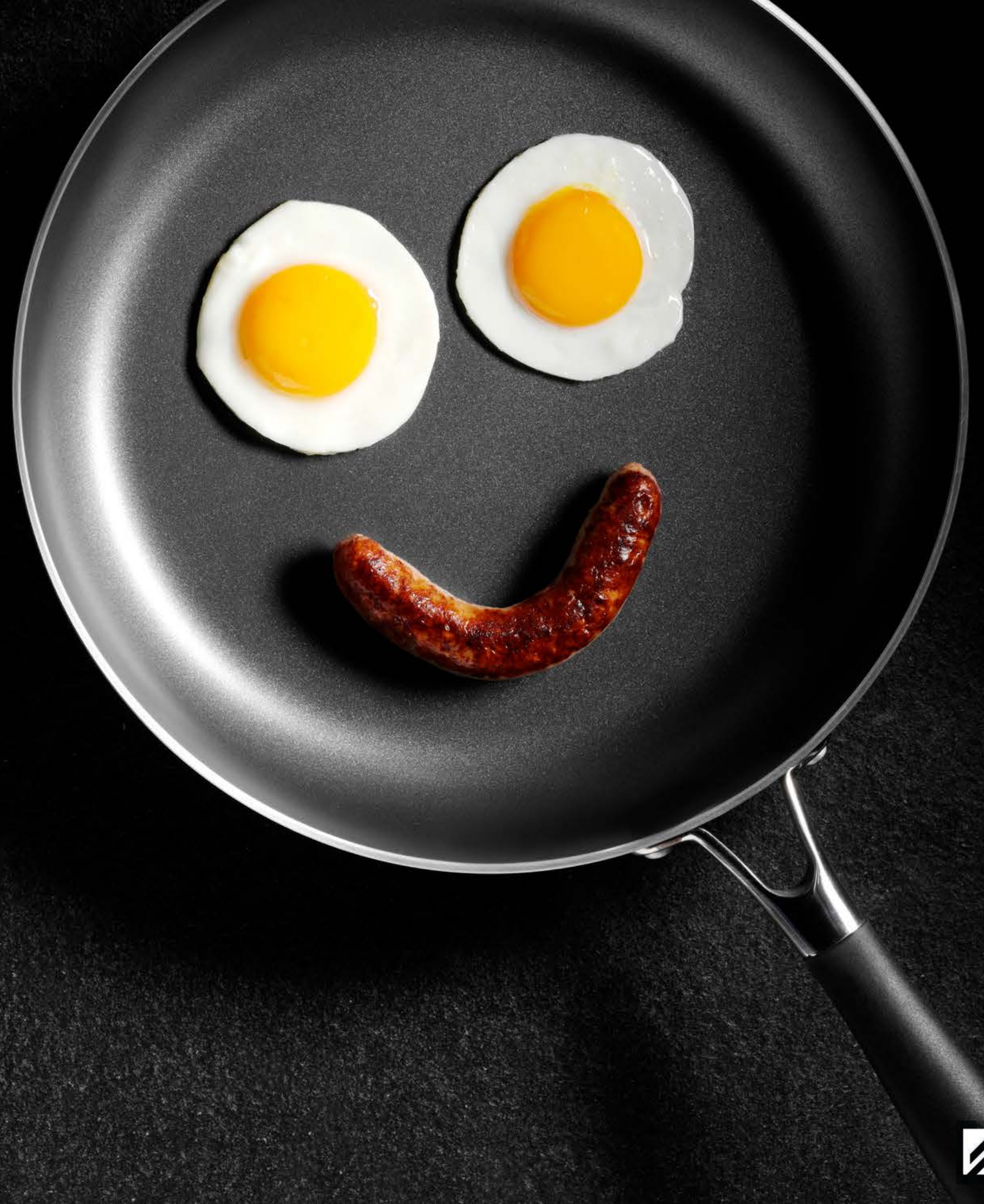
This increased emphasis on 'shop local', in combination with the preference to order for pick-up and engage directly with restaurants, creates a big opportunity for food services establishments to **connect with new local customers and drive loyalty with existing ones.**





**Key finding #3**

**Businesses still have  
work to do when it  
comes to asking for  
feedback**

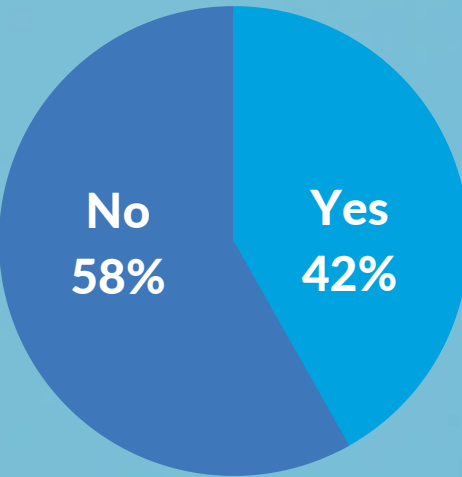




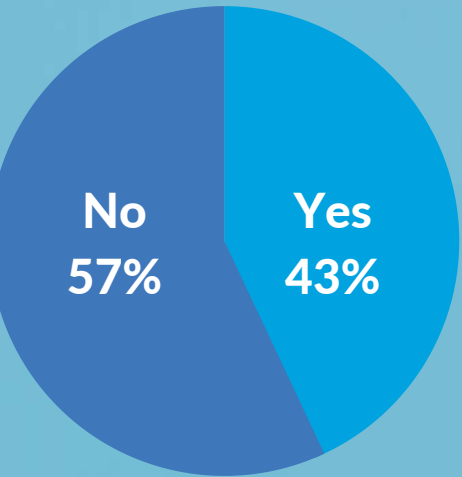
When it comes to consistently asking customers for feedback, **businesses still have work to do.**

Percentage of respondents reporting they had been asked to provide feedback on a recent experience

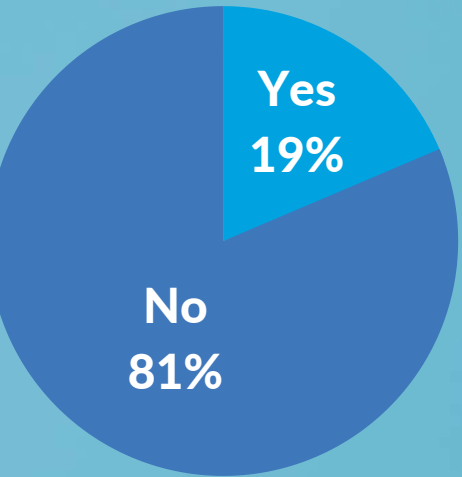
In-store purchase / service interaction



Online purchase / service interaction



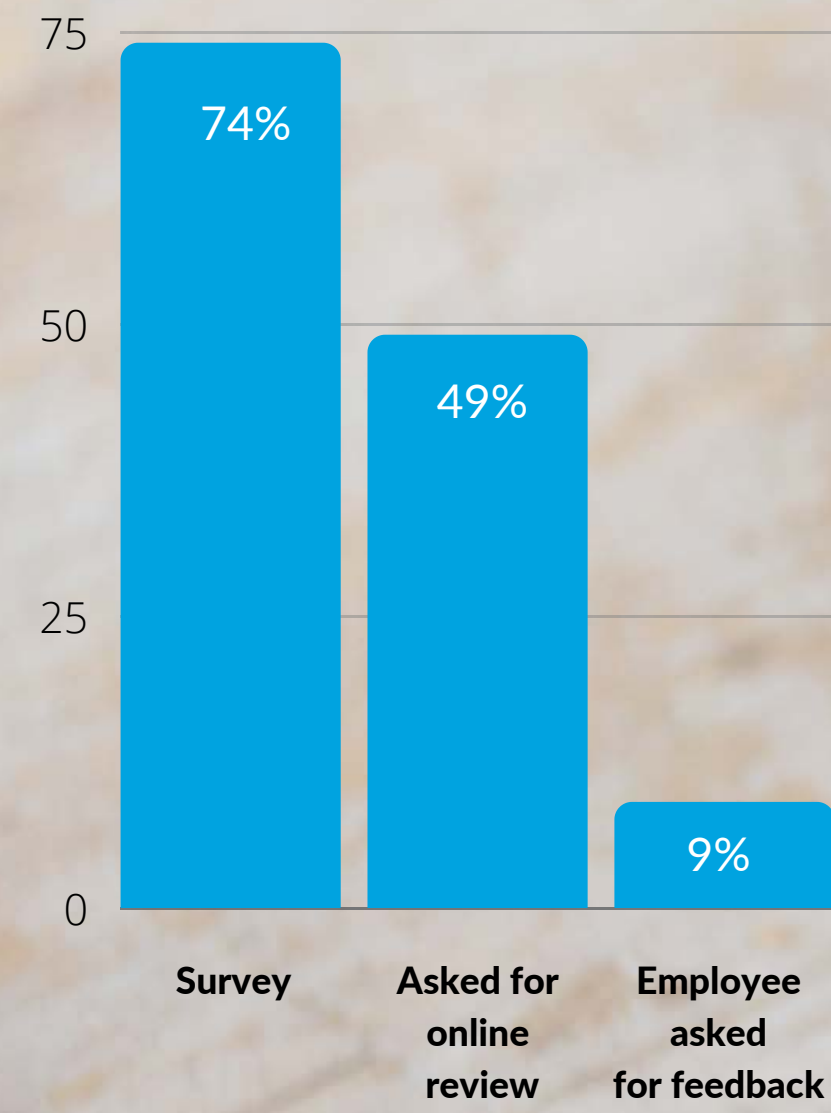
Phone purchase / service interaction





# Surveys lead the pack in terms of the most frequently used method to solicit feedback.

Percentage of respondents reporting how the business they interacted with asked for feedback





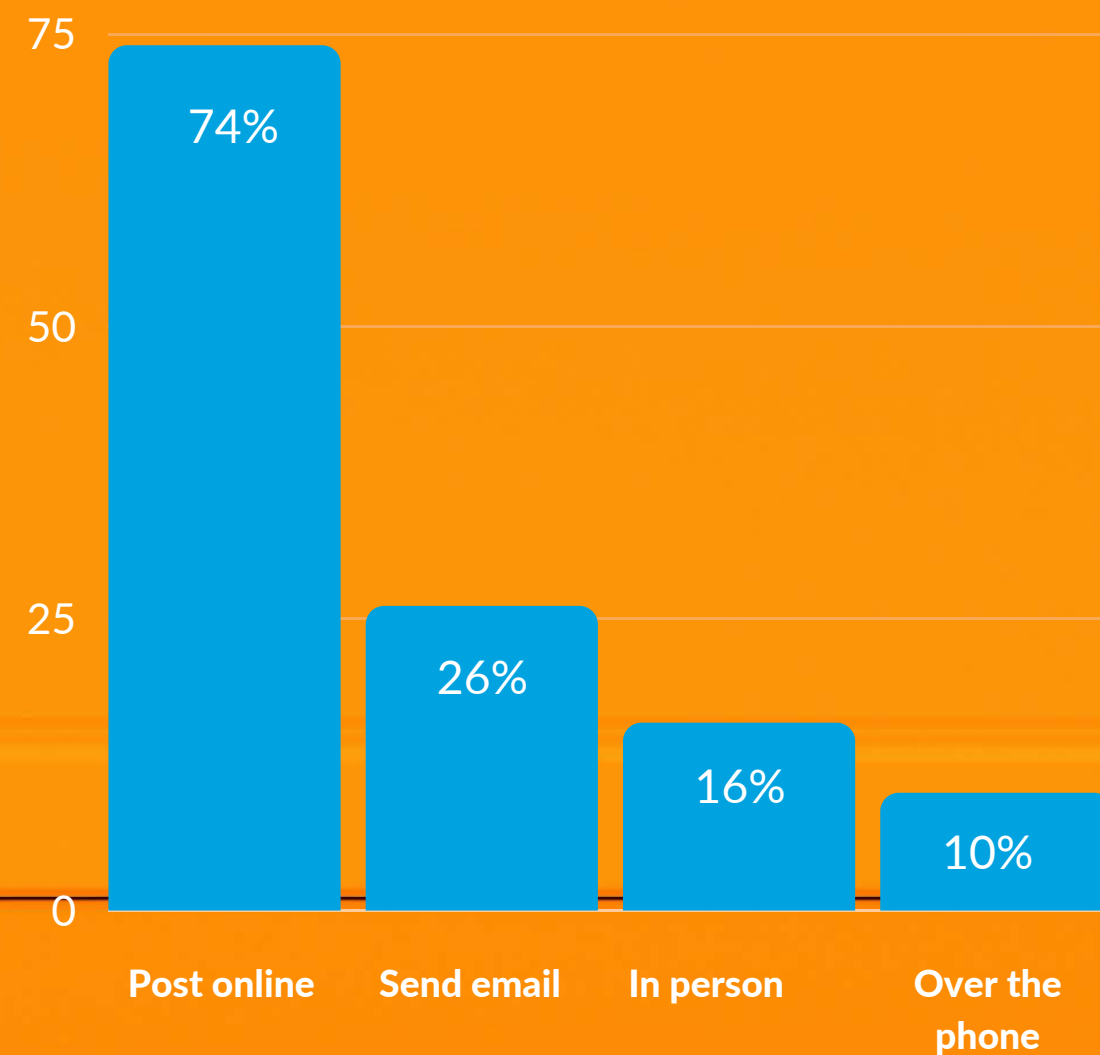
80% of our respondents **reported providing feedback when asked.**





Of the people who were **not asked for feedback, but provided it anyway**, 74% are posting that feedback online.

Percentage of respondents reporting the method they used to provide un-solicited feedback





# The next chapter

With a year under our collective belts facing this global pandemic, we are hopeful that we are getting close to the end of this crisis. restaurants, there are a few things that we know for certain:

- Consumer needs continue to shift away from basic needs back to pre-Covid drivers, like **quality**.
- As consumers have had a year of engaging with businesses in different ways, these **habits have now been established and are here to stay**.
- There are opportunities for all businesses to **engage with their customers in a more meaningful way** to understand what consumers value most about their brand.







As we all look ahead, here are a few key takeaway to keep in mind:

- Consumers expect - and will continue to expect - you to provide them with a **safe, secure and clean experience**;
- Take advantage of **customers' preference to connect locally and directly**. Even national brands can take a grassroots approach to engage with the community in which they operate;
- Give your **customers a place to give you their feedback** - don't let them run wild and take to the internet.
- Since customers are likely to come in to your restaurant to pick up food, **look for ways to collect feedback from them directly!** For example, place QR codes in waiting areas so they can scan and take a survey while they wait.



Now more than ever, it is critical to understand how your customers want to engage with you. Invest in those experiences to maximize your return on investment and future-proof your business!

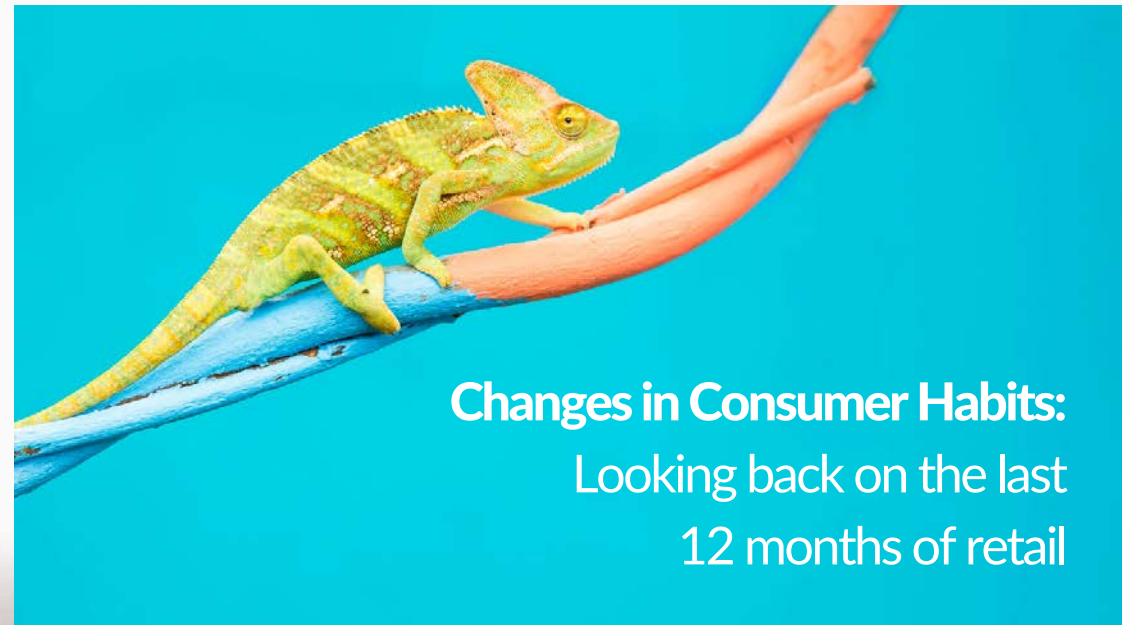




## Check out our other reports



March 2021



May 2020

- Changes in Consumer Habits: A Field Study on the Future of Retail
- Changes in Consumer Habits: A Closer Look at Restaurants and Food Service Establishments
- Changes in Consumer Habits: Implications for Convenience and Gas Stations

October 2020

- Changes in Consumer Habits: A Six Month Comparison on the Evolution of Retail
- Changes in Consumer Habits: Looking ahead, learnings for restaurants and food service establishments
- Changes in Consumer Habits: A Six Month Assessment on the implications for Convenience and Gas Stations

To download all past reports, visit: [www.intouchinsight.com/consumer\\_habits\\_reports](http://www.intouchinsight.com/consumer_habits_reports)



# About us

At Intouch Insight, our focus is on enabling businesses to collect insights that drive improvement and influence outcomes. Though a lot has changed over our past 40 years in business, our focus remains the same.

We are on a mission to be the leading software and services provider, offering an integrated solution that enables our clients listen to their customers, interpret the results, and act to align operations with customer expectations.

By leveraging our deep expertise and flexible software platform, our clients are empowered to delight their customers and improve their bottom line.



**Please note:** For additional survey points and data insights please contact [letschat@intouchinsight.com](mailto:letschat@intouchinsight.com).



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