



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.



- B&M (100)
- A&W (100)

- B&M (100)
- A&W (61)

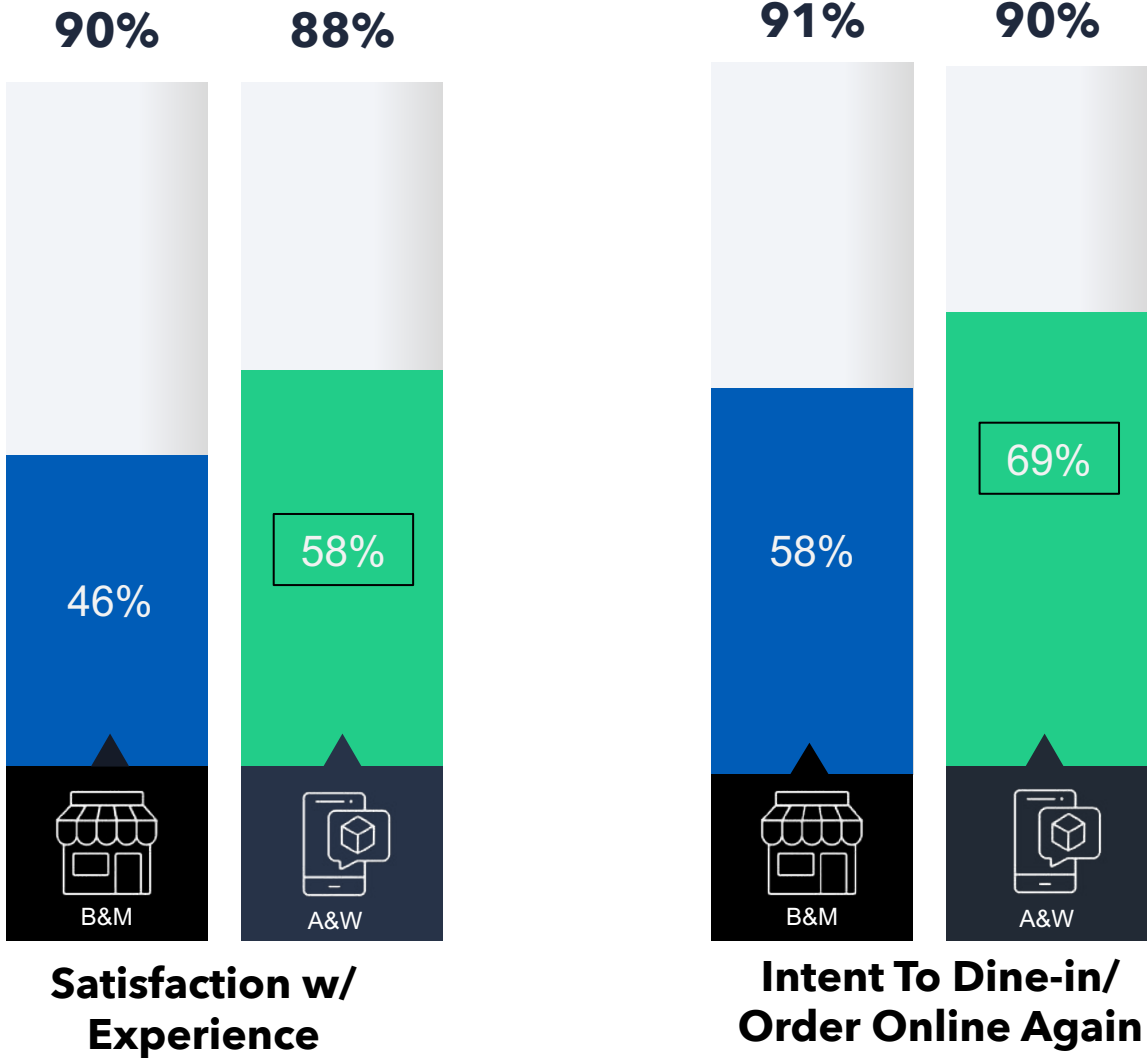
- B&M (100)
- A&W (59)

Online: higher experience & satisfaction than in-store.

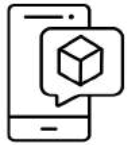


Repeat users.

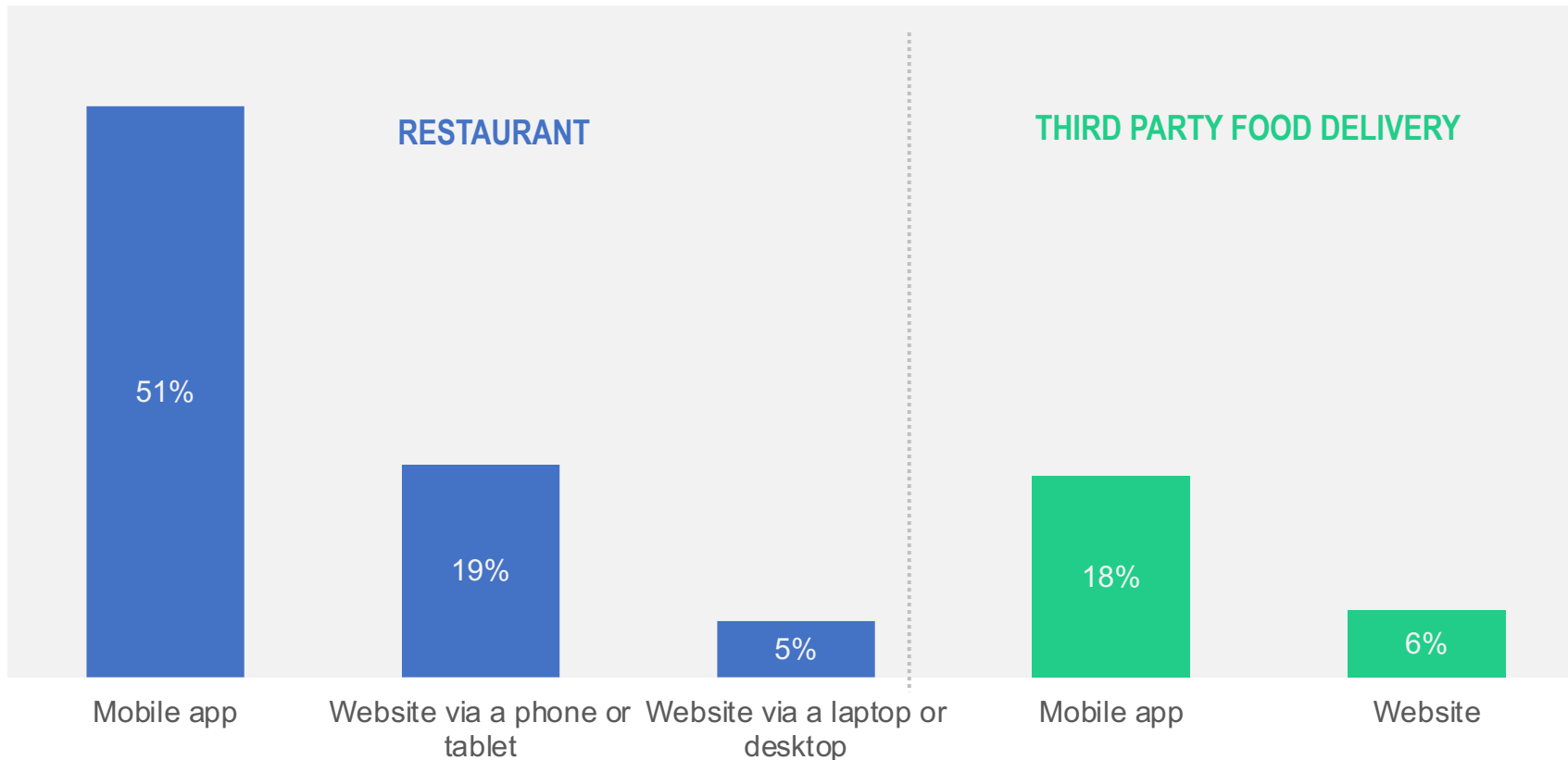
- Online returns 11% more than in-store.
- Consumers who used an app to order food have a higher intent to do it again.



Restaurant-owned apps have a loyal base.



Preferred Method for Ordering Food for Delivery



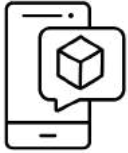
App users.

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

Freshness + user-friendly site = customer satisfaction.



Feedback on the food ordering experience.



A&W

TOP TIER (over 90% satisfaction ratings)	SECOND TIER (80%-90% satisfaction ratings)	THIRD TIER (below 80% satisfaction ratings)
Food tasted fresh.	The portion was just the right amount.	My order was on time.
Food was stored well.	I was able to order everything I wanted.	I was able to track order progress.
Website/app was user-friendly.	I was able to customize my order.	The delivery fee was reasonable.
	My order was accurate.	
	No items were missing from the order.	
	I was satisfied with the food temp.	
FRESHNESS USER-FRIENDLY APP	ORDER ACCURACY MADE TO ORDER	ON TIME DELIVERY

Safety + contactless payment = comfortable dining.



Thoughts on the restaurants' response to COVID-19.



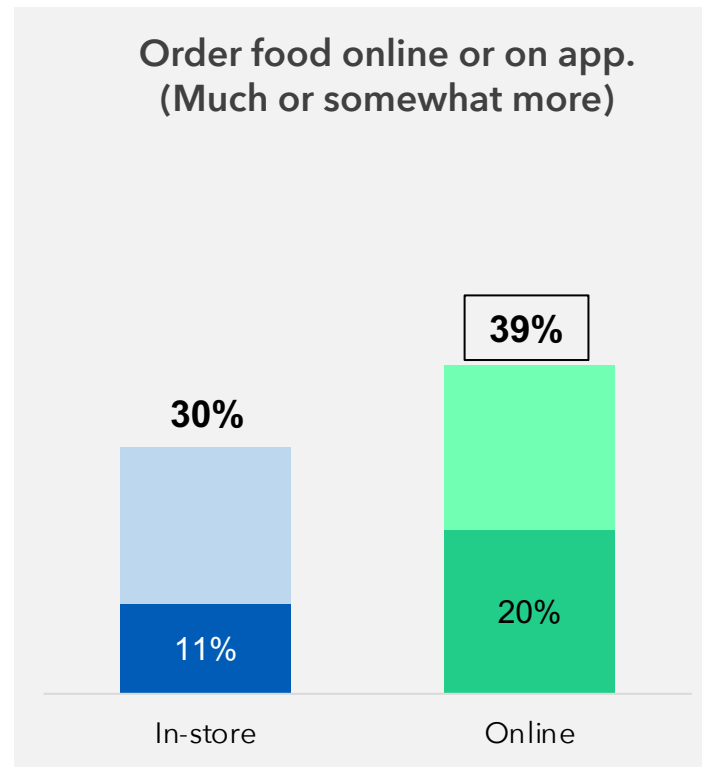
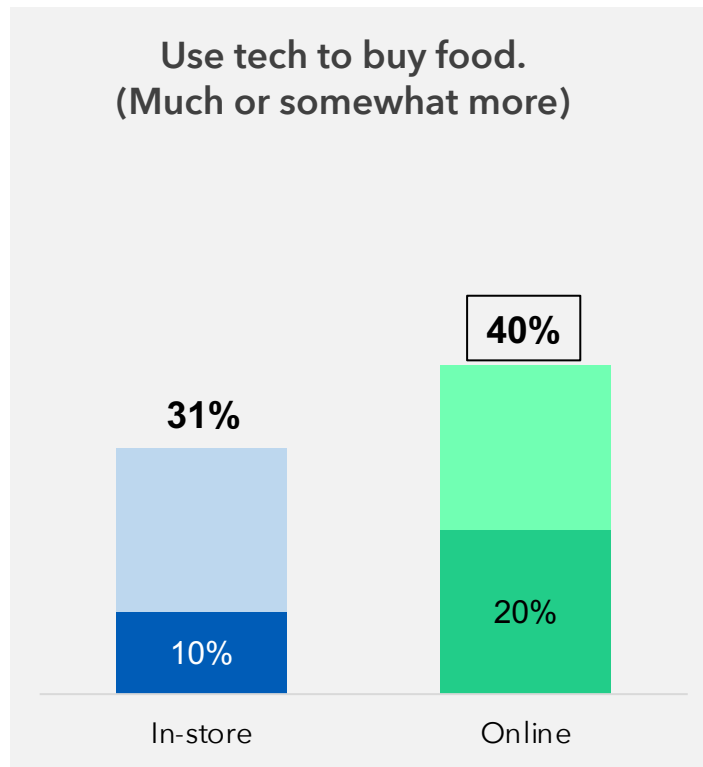
B&M

TOP TIER (over 90% satisfaction ratings)	SECOND TIER (80%-90% satisfaction ratings)	THIRD TIER (below 80% satisfaction ratings)
The staff always wore facial masks.	The restaurant was clean.	Contactless payment options available.
	The measures made me feel safe to dine in.	High-touch areas cleaned and disinfected.
	Signs posted to stop spread of COVID-19.	Outdoor dining tables were spread out.
	High touch items were removed from use.	
STAFF WORE FACIAL MASKS	CLEANLINESS SAFETY ASSURANCE	CONTACTLESS PAYMENT OUTDOOR SEATING SPREAD OUT

Expect consumers to keep using apps & websites.

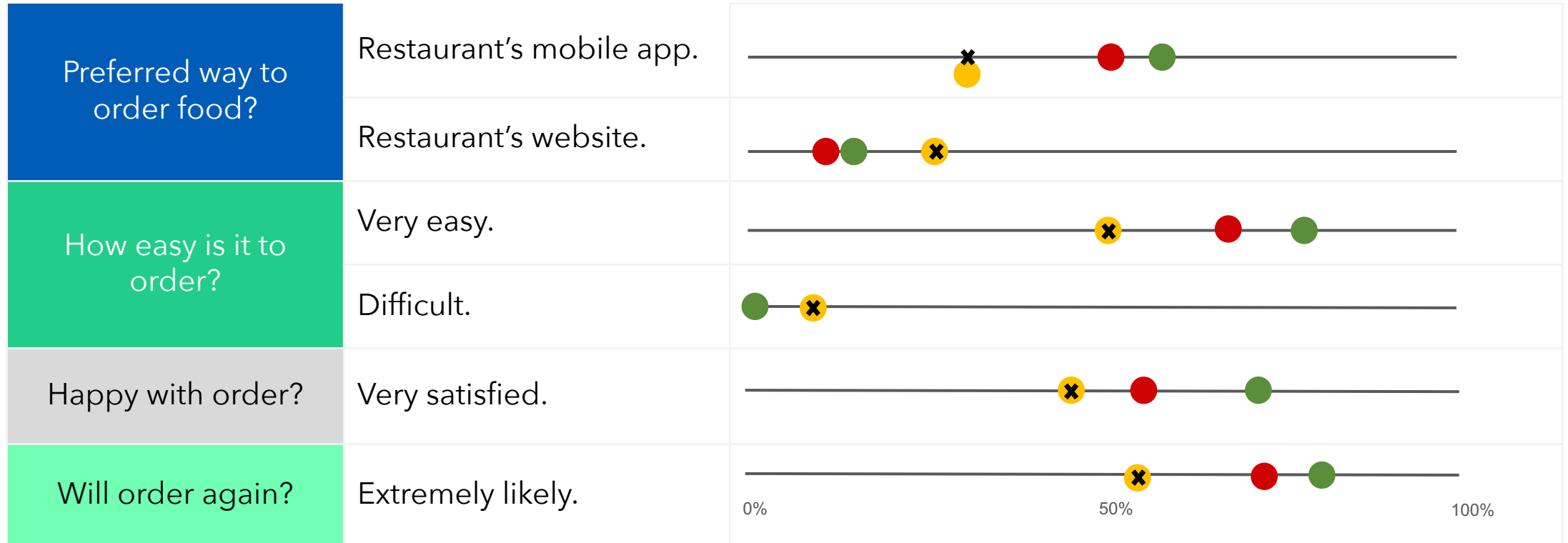


Shifts in online orders from COVID-19.



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.



✘ Indicates Buffalo Wing scores significantly above or below one or both competitors

Buffalo Wild Wings: opportunity to improve safety guidelines.



B&M

Happy with COVID-19 precautions.

Response to COVID-19.

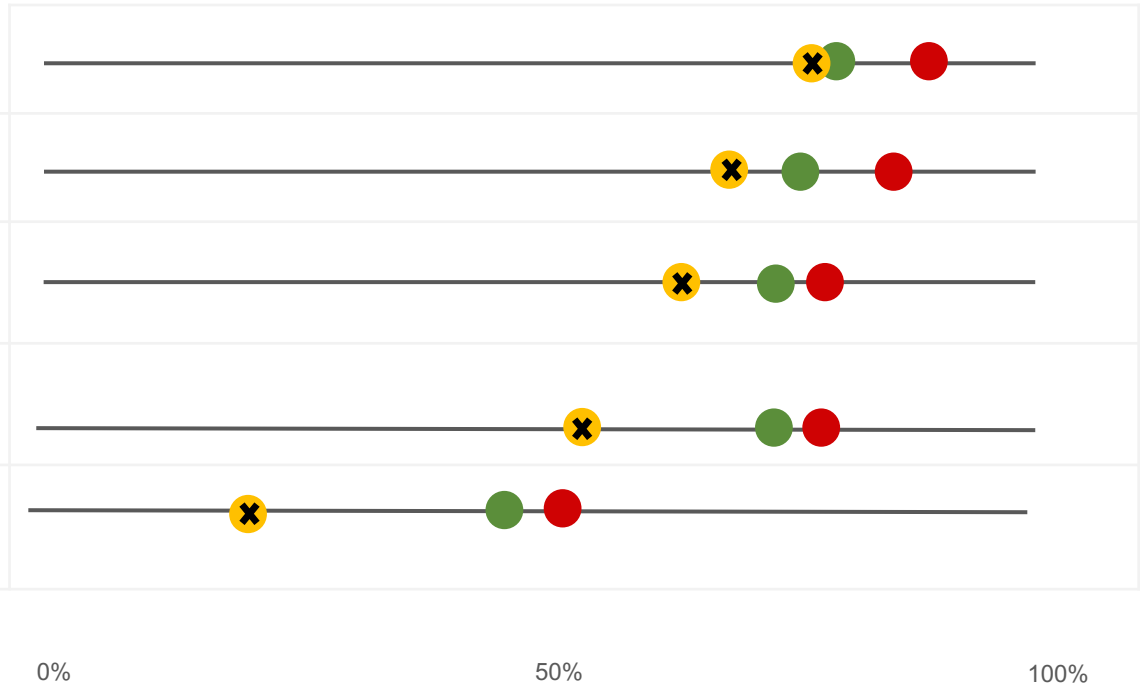
Staff always wore facial masks.

Took steps to keep it clean.

Signs posted to stop spread of COVID-19.

Contactless payment options available.

Excellent.



x Indicates Buffalo Wing scores significantly above or below one or both competitors



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.

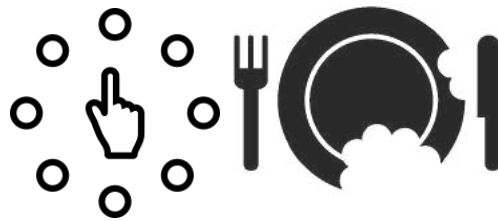


Outdoor dining.



Contactless payment.

And online.



Good variety.

For cravings.



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.



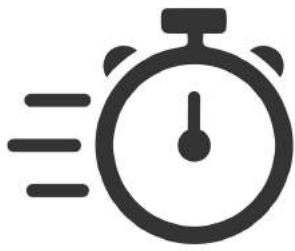
Contactless payment.



Has areas for improvement.



COVID response.



Dine-in
& delivery times.



Contactless
payment.

Ordering at BWV.

- 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.



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.



App & Web.

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.





Brick & Mortar.

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.