

WHAT DO GUESTS WANT NOW?

The customer journey at restaurants and hotels has evolved at a radical pace due to the pandemic.



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Our experience conducting a study of customer attitudes toward hotel and restaurant technology in the midst of a pandemic has been, yes, unprecedented. In fact, as COVID 19 spread across the U.S. in the spring of 2020, we concluded that any meaningful data collection would have to be pushed into the fall. The resulting study, conducted just prior to the presidential election, reflects customers' 2021 travel plans, sentiments around hotel and restaurant technology, top concerns about health and safety, and general attitudes toward hospitality-focused technology.

We're aware that this year's study is a snapshot of consumer sentiment at a precarious time. We're also confident that the overall appetite for travel and dining experiences reflected in our data is likely to grow in the coming months.

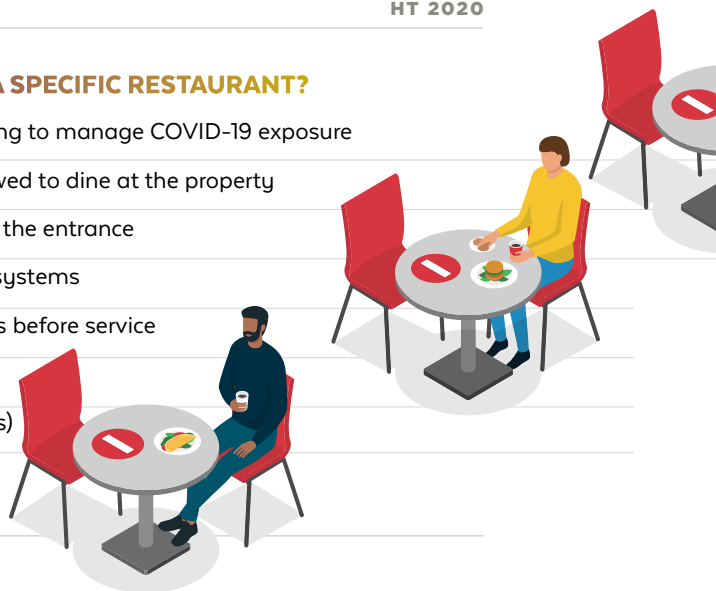
We're also heartened to note that, in this year of upheaval, some things haven't changed (spoiler: free Wi-Fi remains as popular as ever).

Our Respondents Are Seasoned Travelers & Frequent Diners

The 2020 Customer Engagement Technology Study represents the sentiments of 840 respondents who are seasoned travelers: 44% report that they took five or more trips in the past 24 months, and nearly 25% took seven or more trips during that period; 45% mostly stay at midscale hotels, 30% at upscale, 13% at economy hotels, and 10% at luxury hotels, and 2% at "alternate lodging" such as vacation rentals. Our respondents are also frequent diners: 13% report that they dine out 12 or more times per month; 69% frequent full-service family/casual restaurants, 65% frequent fast food/quick service establishments, 55% frequent fast casual restaurants, 29% frequent fine dining restaurants, and 1% report frequenting "other," such as food trucks, convenience stores, and workplace cafeterias. (Note that diner preferences add up to more than 100% because consumers could select multiple responses.)

WHAT ARE THE MOST IMPORTANT FACTORS IN SELECTING A SPECIFIC RESTAURANT?

- 73%** The restaurant clearly communicates about procedures it is using to manage COVID-19 exposure
- 71%** The restaurant has reduced the amount of guests that are allowed to dine at the property
- 70%** The restaurant provides an automatic hand sanitizer station at the entrance
- 67%** The restaurant employs enhanced air circulation and filtration systems
- 67%** The restaurant provides hand sanitizer wipes to guests at tables before service
- 63%** The restaurant uses pre-packaged condiments
- 59%** The restaurant doorways are all hands free (including restrooms)
- 51%** The restaurant uses plastic screens at the hostess station



WHAT ARE THE MOST IMPORTANT FACTORS FOR CUSTOMERS ORDERING RESTAURANT TAKEOUT, PICKUP, AND DELIVERY?

- 66%** The restaurant offers drive-thru
- 66%** Ease of online ordering process
- 65%** Ability to place food order online
- 64%** Ability to preview menus and nutritional information
- 63%** The restaurant has positive consumer reviews and high ratings
- 61%** The restaurant offers curbside pick up
- 60%** Ability to place a food order from your mobile device
- 58%** The restaurant offers food delivery
- 56%** Ability to track order status
- 55%** Ability to pay for food via your mobile device i.e., contactless payment)
- 54%** The restaurant offers its own delivery service
- 52%** Cashless tipping
- 52%** The restaurant has a mobile app

delivery, offering benefits to both guests and operators alike. This trend will likely continue as the Fourth Industrial Revolution takes hold and is dominated by robotics, the Internet of Things, artificial intelligence, autonomous vehicles, drones, and virtual and augmented reality.

What has received very little attention throughout the pandemic is environmental stewardship. Many COVID-related mitigation strategies rely on the use of disposable items. Few seem to be focused on recycling and environmental sustainability during these difficult times, but operators cannot and should not forget the importance of the environment to their guests and to the overall future of the hospitality industry.

Innovation and the ability to quickly pivot are critical to one's success. Regrettably, the pandemic will be with us for a while, and unfortunately, not every restaurant and hotel will make it. The industry has already seen several closures, and there is an ominous cloud hovering overhead that more are likely to come, especially as the pandemic lingers. Hotel and restaurant operators need to be prepared for a marathon, not a sprint, as the past 9 months have proven. While the immediate focus is on endurance, sustainability, and building consumer confidence to win back their business, operators need to begin thinking beyond COVID and what their post-COVID operations, services, and amenities will look like.

The hospitality industry has illustrated a great deal of resilience in the past, and it is this resilience that will carry the industry to the future, but this future will be forever changed by COVID-19. **HT**

