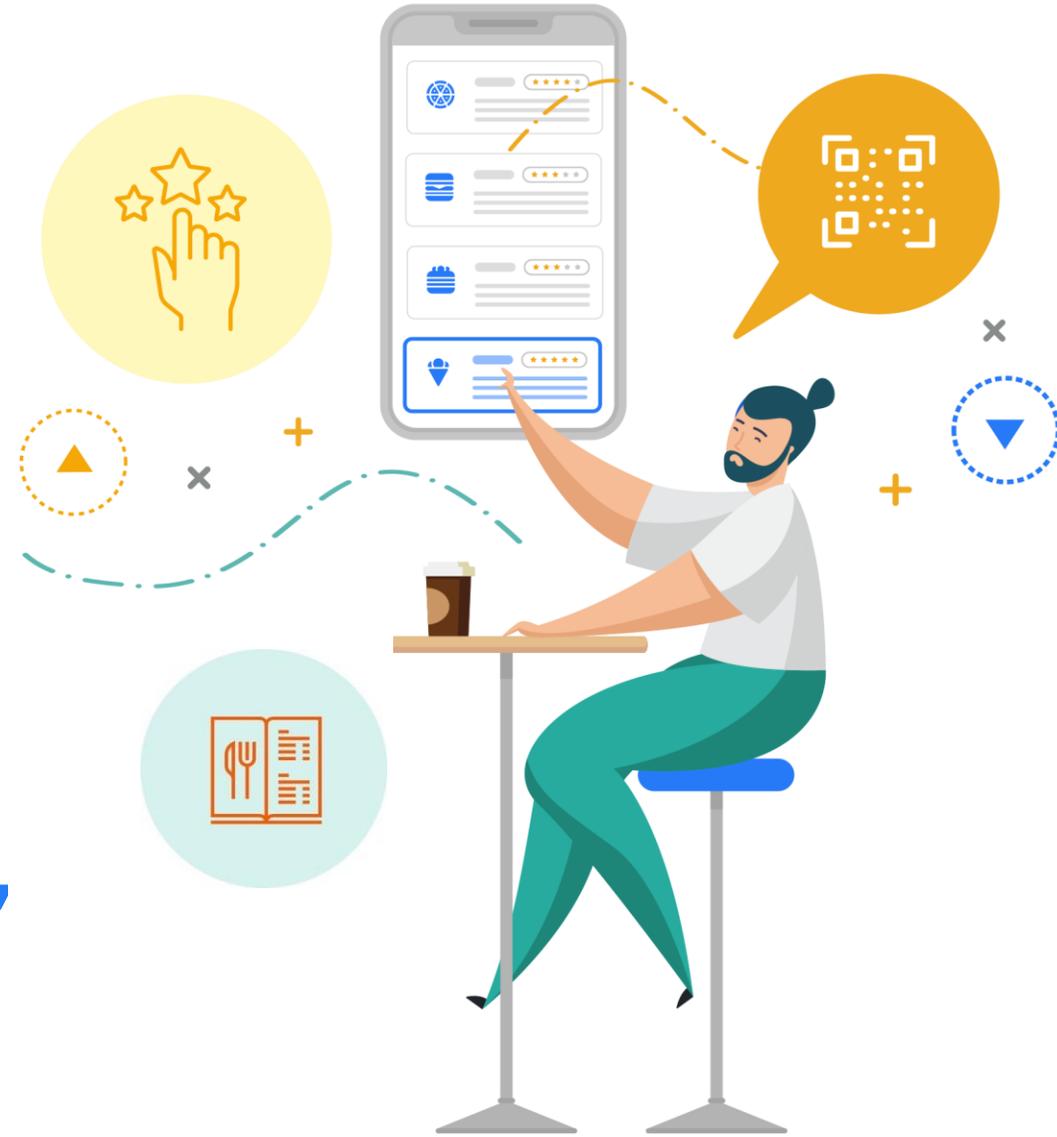




Restaurant Consumer Insights

2022 Q2: The Restaurant Experience and What Guests Think About Tipping, QR Codes & Reduced Menus

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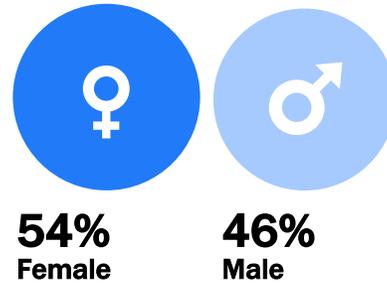




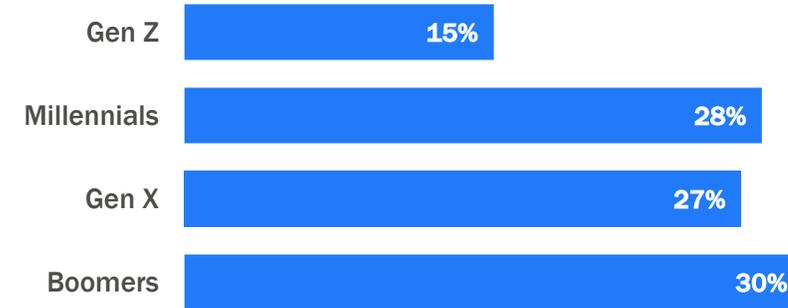
About the survey

RMS surveyed 769 people in the United States from June 10th to June 17th, 2022.

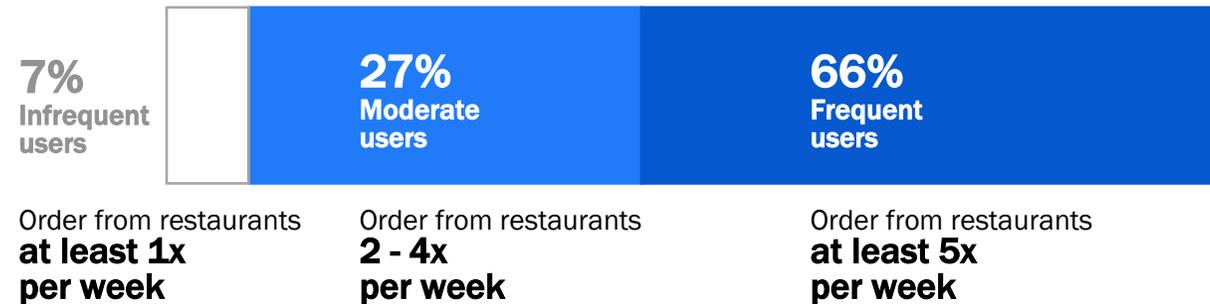
Gender



Generation



Restaurant usage





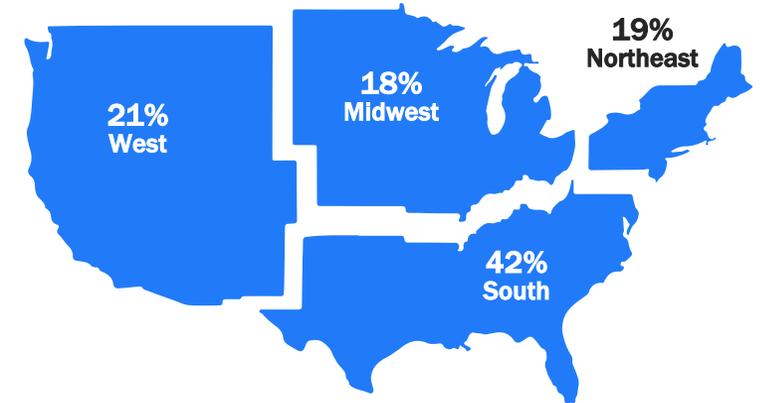
Respondent breakdown

RMS surveyed 769 people in the United States from June 10th to June 17th, 2022.

Employment status

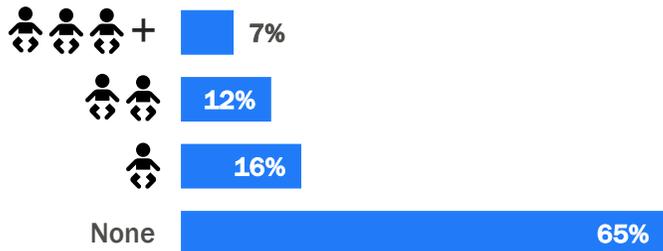


Region

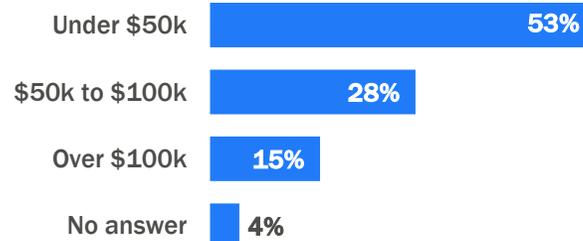


Children

Under the age of 16 in the household



Household Income



Geographic area





Experience

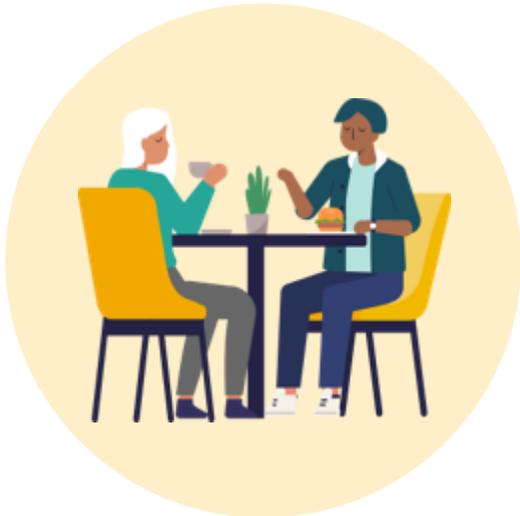
Guests are still eager to visit restaurants, with the majority of respondents reporting at least one monthly visit to a sit-down or limited-service restaurant.

Intentions when dining out revolve around having a family dinner or just a casual night out. For limited-service, customers seem to be more driven by special deals they heard about.

Insight One

70%

reported at least one visit to a **sit-down restaurant** in the past month



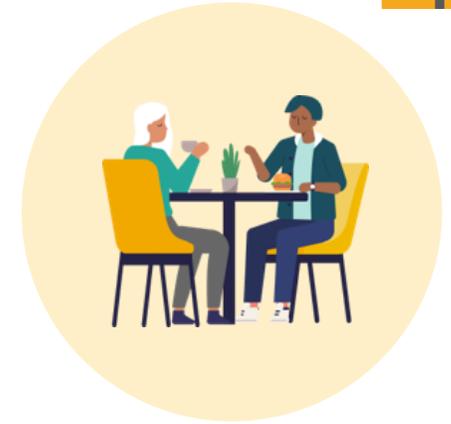
50%

reported at least one visit to a **limited-service restaurant** in the past month

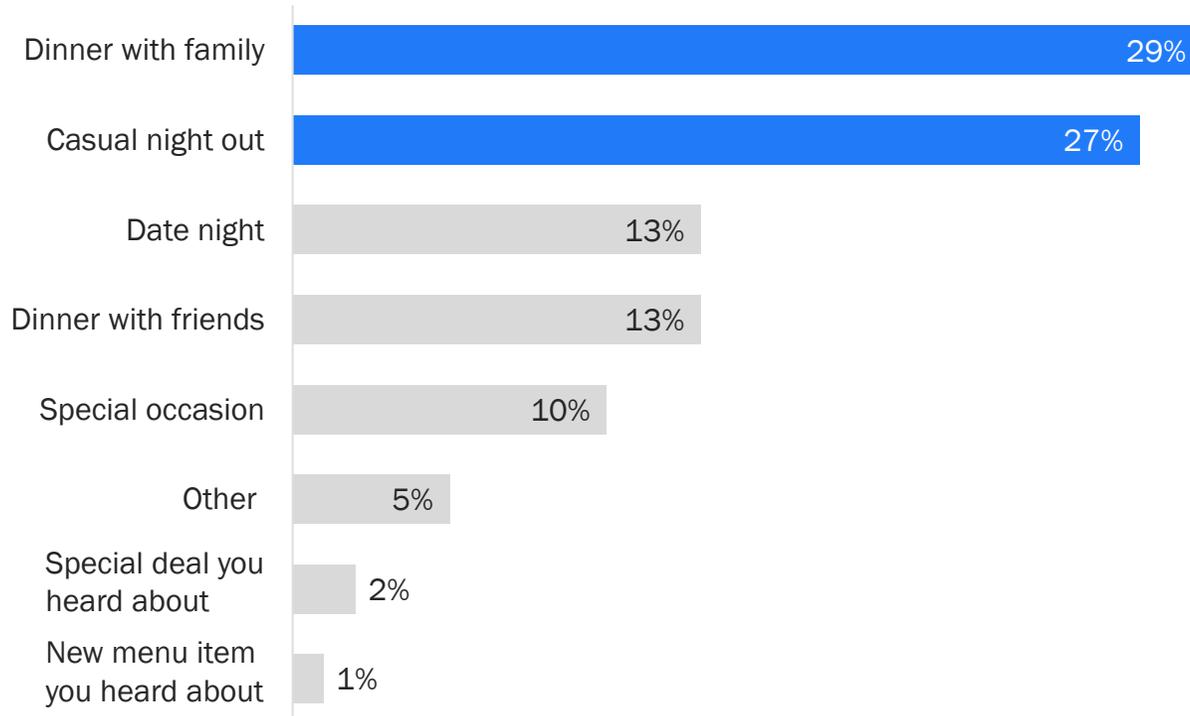


Insight Two

Of those that visited a **sit-down restaurant**, most went to enjoy a **family dinner** or a **casual night out**



Which of the following best describes the reason for your last visit to a sit-down restaurant?



Additional Insights

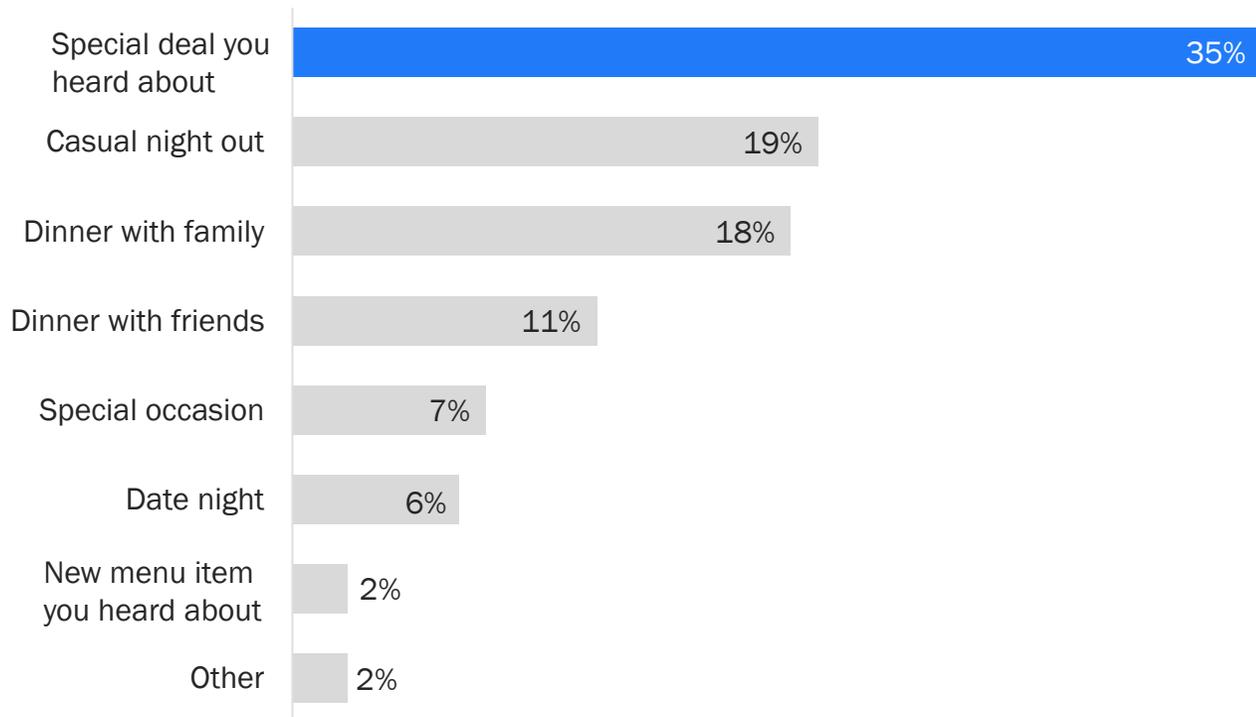
When asked about their likelihood to return 85% of respondents said they would be “likely” or “very likely” to return to the last sit-down restaurant they visited.

Insight Three

Of those that visited a **limited-service restaurant**, **more than 1 in 3** went because of a special deal they heard about



Which of the following best describes the reason for your last visit to a limited-service restaurant?



Additional Insights

When asked about their likelihood to return 82% said they would be “likely” or “very likely” to return to the last limited-service restaurant they visited.



Summary of Experience

1. Guests are still eager to visit restaurants. In the past month:
 - **70%** reported at least one visit to a **sit-down restaurant**
 - **50%** reported at least one visit to a **limited-service restaurant**
2. Of those that visited a sit-down restaurant, most went to **enjoy a family dinner or a casual night out**. **85%** of said they would be **likely to return** to the last sit-down restaurant they visited.
3. Of those that visited a limited-service restaurant, more than **1 in 3** went because of a **special deal** they heard about. **82%** said they would be **likely to return** to the last limited-service restaurant they visited.



Tipping Habits & Intentions

Tipping habits have evolved since the beginning of the COVID-19 pandemic. 1 in 2 now find themselves tipping more often.

And while suggestive tipping at checkout might help your servers, 1 in 2 respondents dislike this method.

Insight Four

79% of respondents believe tipping is an effective way to support restaurant staff



Some tipping habits have evolved during the pandemic:

51%

reported **tipping more often** now than before the pandemic.

41%

reported **tipping more than the customary 15-20%**.

40%

said they are **tipping for services that they did not tip for** prior to the pandemic.



Insight Five

**When it comes to checking out at restaurants,
almost 1 in 2 respondents dislike tipping suggestions**

Share of participants who responded "agree" or "strongly agree"

**48% dislike tipping
suggestions on
check out screens**

51% feel obligated to tip
when suggested amounts or
percentages are displayed
on checkout screens

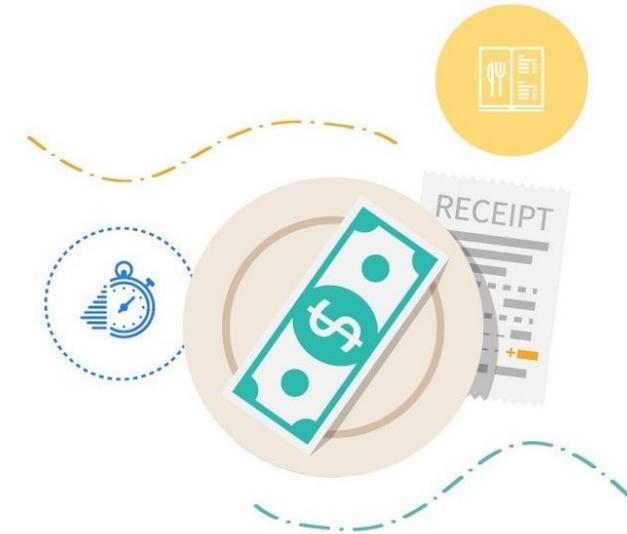
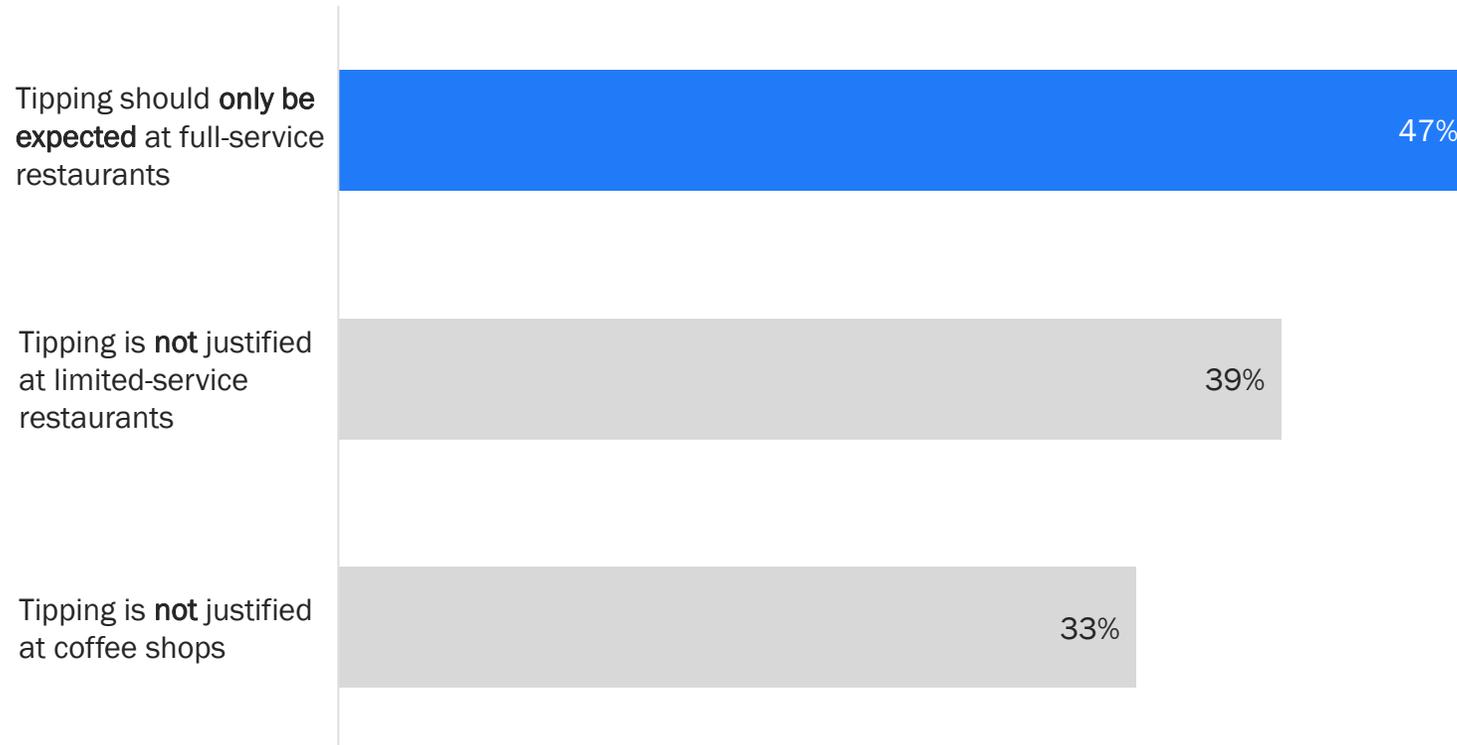
44% find tipping suggestions
to be **too high**

Insight Six

Almost 1 in 2 believe tipping should only be expected at full-service restaurants

Please indicate how much you agree or disagree with the statements below:

Share of participants who responded "agree" or "strongly agree"



Deep Dive

In general, US consumers believe tipping is justified. Only 1 in 3 feel tipping is not justified at coffee shops or limited-service restaurants.



Insight Seven

Restaurant goers state they **tip most** when dining at **full-service restaurants**

Assuming you received a satisfactory level of service, how much would you typically tip for the following activities?

Average tip left by guests when....	Avg. tipping % of total bill
Eating at a sit-down restaurant	16%
Ordering delivery online or from an application	11%
Ordering from a limited-service restaurant	10%
Ordering from a coffee shop or casual eatery	9%
Picking up takeout from a sit-down restaurant	8%

Deep Dive

Guests are likely to tip less when picking up takeout orders.

Summary of Tipping Habits & Intentions

4. **79%** of respondents believe **tipping** is an effective way to **support restaurant staff**. Responses show that tipping habits have evolved since the beginning of the COVID-19 pandemic.
5. When it comes to checking out at restaurants, **almost 1 in 2 respondents dislike tipping suggestions**.
6. **Almost 1 in 2** believe tipping should only be expected at **full-service restaurants**.
7. Restaurant goers state they **tip most** when dining **at full-service restaurants**. Guests are likely to tip less when picking up **takeout orders**.



QR Codes

While QR codes are helpful for operators looking to quickly switch up their menu or reduce printing costs, customers are not as enthusiastic.

However, this opinion seems to be more prominent in older generations. Gen Z and millennials are more accepting of having QR codes as part of their restaurant experience.

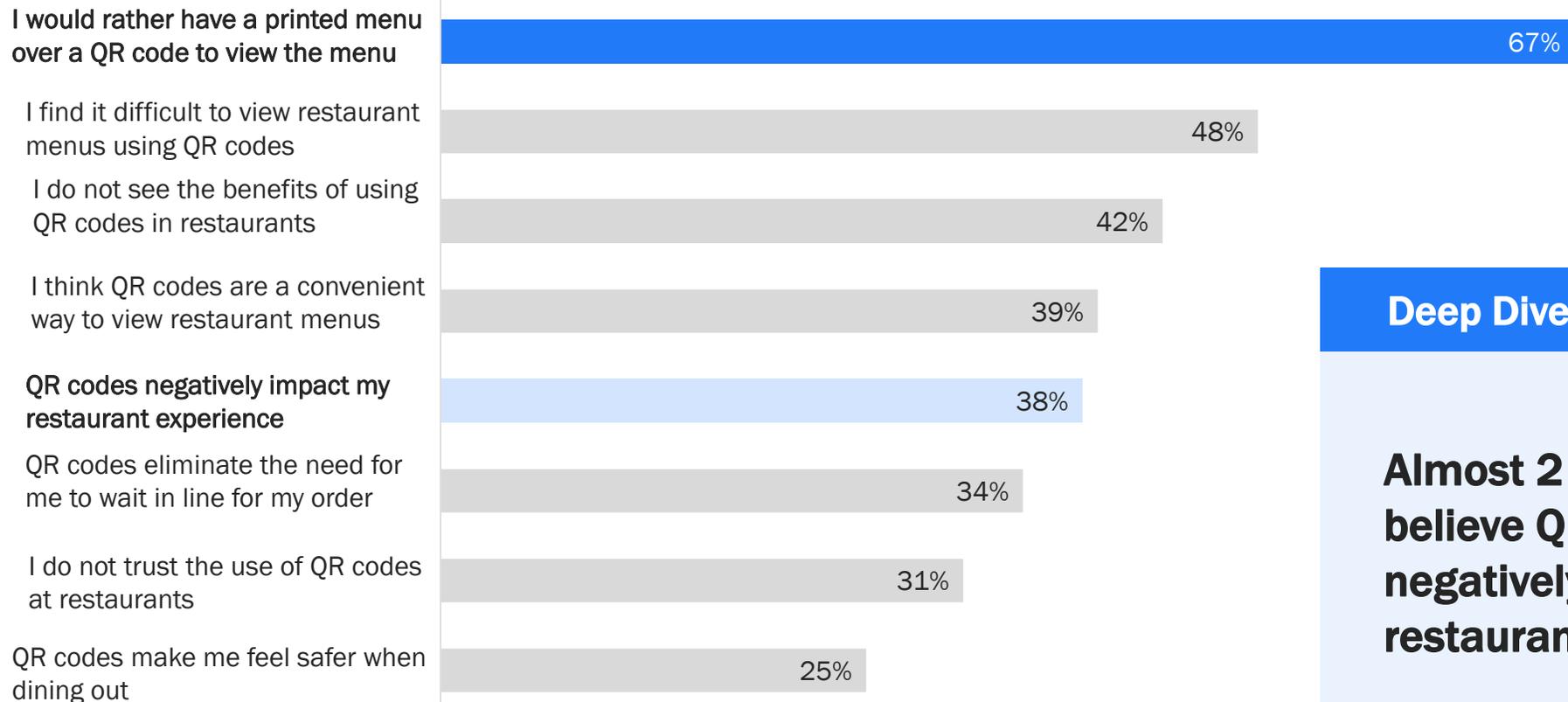
Insight Eight

2 in 3 favor printed menus over QR codes when visiting a restaurant



Please indicate how much you agree or disagree with the statements below:

Share of participants who responded "agree" or "strongly agree"



Q2 2022 n769

Deep Dive

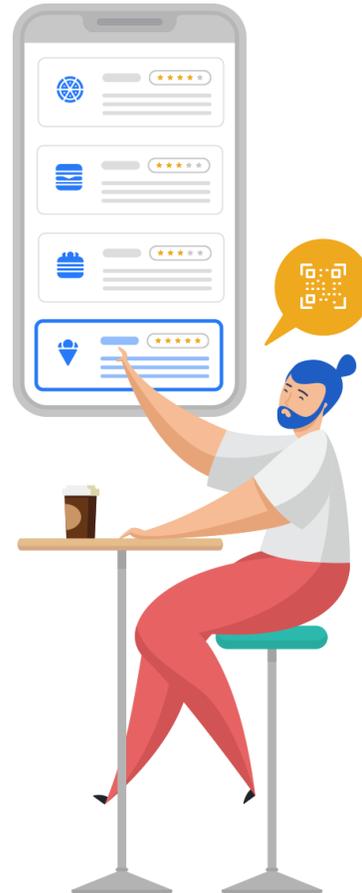
Almost 2 in 5 respondents believe QR codes negatively impact their restaurant experience.

Insight Nine

Younger generations have a more positive view of QR codes in comparison to older generations

50%

of **Gen Z and millennials** think QR codes are **a convenient way to view menus**, while only **21%** of **boomers** agree.



33%

of **Gen Z and millennials** see the **benefits** of using QR codes, while only **14%** of **boomers** agree.

Summary of QR Codes

8. **2 in 3** favor **printed menus** over QR codes when visiting a restaurant. **Almost 2 in 5** believe QR codes **negatively impact** their restaurant experience.
9. **Younger generations** have a more **positive view of QR codes** in comparison to older generations.



Menu Engineering

Responses indicate that consumers are aware of menu reduction and have noticed a lack in variety when eating out.

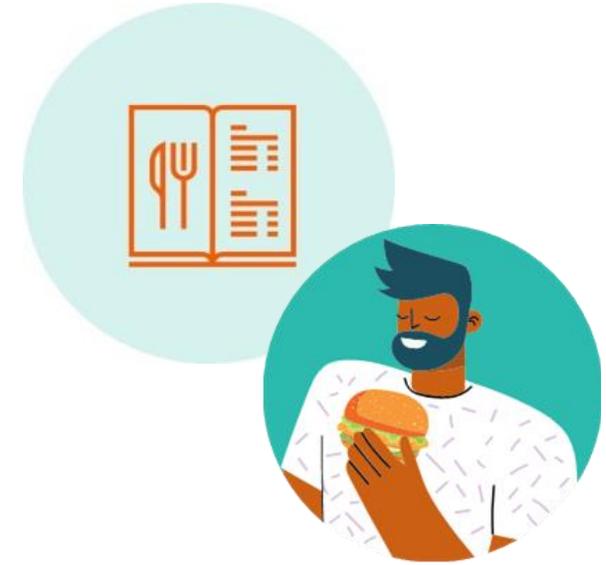
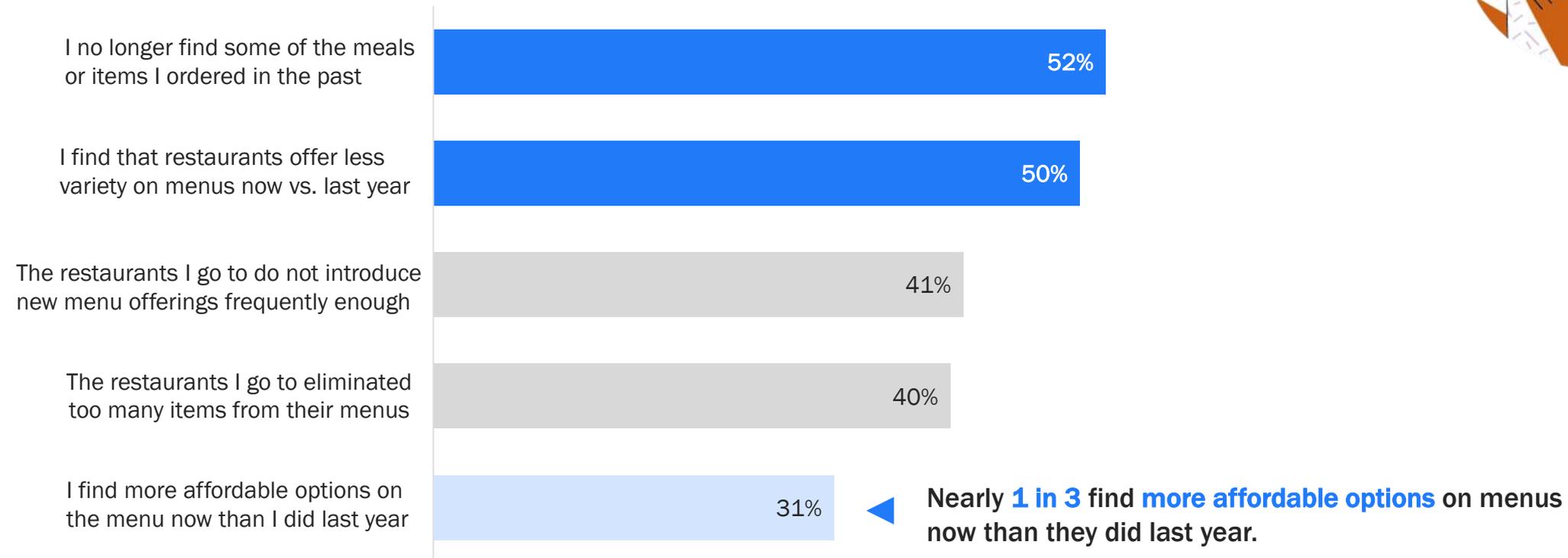
Family and bundle meals, however, have become a promising option for those looking to satisfy the entire household.

Insight Ten

When it comes to menus, **1 in 2** no longer find what they ordered in the past and feel there is **less variety**

Please indicate how much you agree or disagree with the statements below:

Share of participants who responded "agree" or "strongly agree"

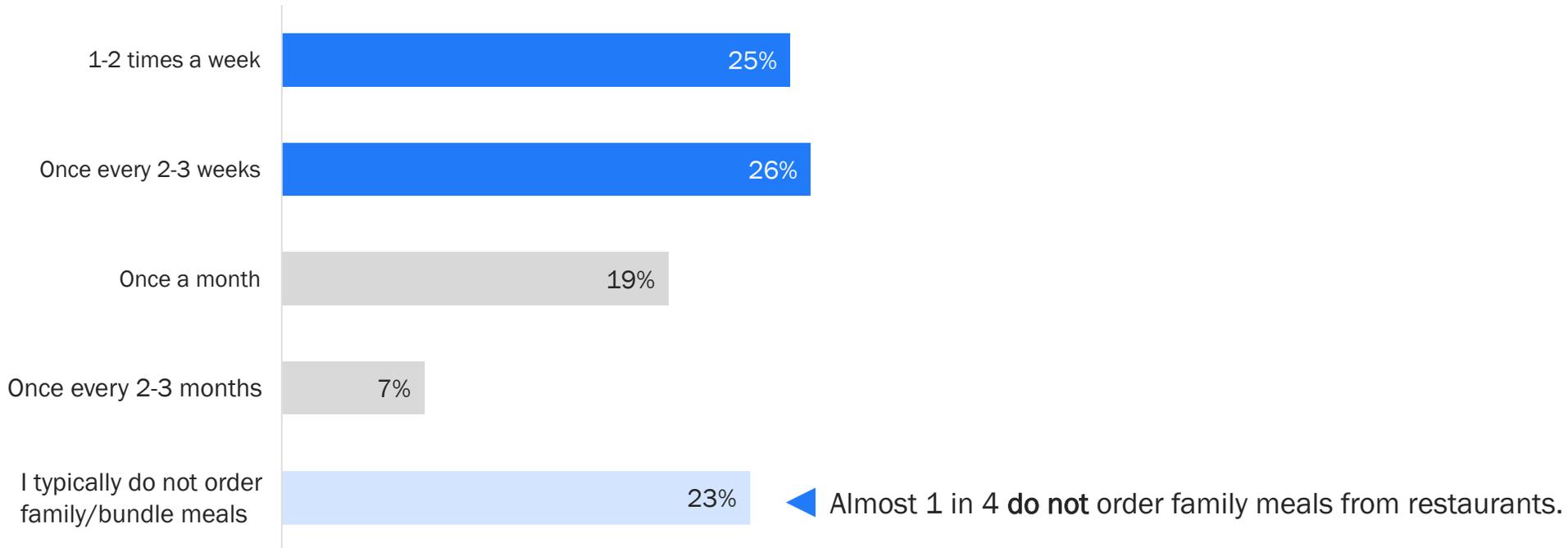


Insight Eleven

More than **50%** of households with 3 or more people order family meals at least every two weeks

How frequently do you order family or bundle meals from restaurants?

(Family or bundle meals typically include 2 or more entrées, sides and sometimes beverages, and are intended to satisfy an average family or small group of people.)





Insight Twelve

When asked **why they opted** for family or bundle meals...

67% mentioned getting better value, pricing & deals

- 26% reported getting better value
- 27% reported getting a better overall price
- 13% mentioned that they are more affordable and simply a better deal

26% appreciate the portion sizes and the ability to meet the entire family's needs

- Leftovers were also a compelling factor

16% highlighted ease and convenience

Insight Thirteen

Value and quantity seem to be important factors for guests looking to cater to the entire family

Other important factors identified by RMS:

The **variety** (9%) offered in family meals is also appealing to consumers.

These meals provide something for everyone in the household to enjoy. This is particularly relevant as consumers are more aware of menu reductions and have noticed less variety in individual meals.

The theme of **togetherness** is important for certain consumers (6%).

A family meal purchased from restaurants is an invitation for all members of the household to gather and share a meal.

Insight Thirteen Cont.

What consumers are saying...

“There is typically more food for less money than if you bought individually, making it a much better deal.”

“It helps create more bond around family.”

“They are often an easy way to feed everyone something they like for a reasonable price.”

“It’s a bit of everything, and everyone can have what they want.”

Insight Fourteen

Of those that said they **did not typically order** a family or bundle meal...

50% mentioned that it was due to different tastes and preferences within their households. **One family meal does not cater to the preferences of all.**

Only 12% mentioned **price.**

“Each person in my family has different likes and dislikes, so it is often difficult to purchase a bundle meal made up of similar food items.”

“Because everyone in my house always wants something different.”

“We all like different foods so we end up purchasing food from multiple restaurants.”

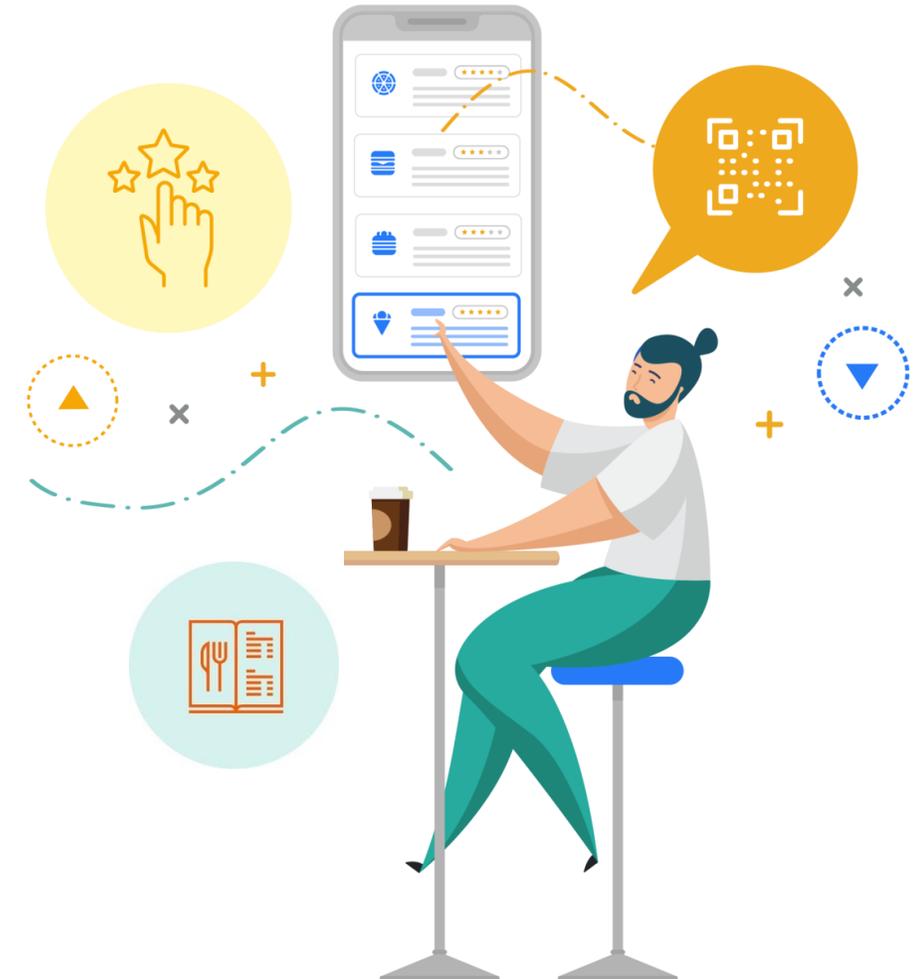
Summary of Menu Engineering

10. When it comes to menus, **1 in 2 no longer find what they ordered in the past** and feel there is **less variety**.
11. **More than 50% of households** with 3 or more people **order family meals** at least every two weeks.
12. When asked why they opted for family or bundle meals, **67%** mentioned getting **better value, pricing & deals**. Portion sizes and convenience were also mentioned.
13. **Value and quantity** seem to be important factors for guests looking to cater to the entire family.
14. Of those that said **they did not typically order** a family or bundle meal, 50% mentioned that it was **due to different tastes and preferences** within their households.

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