



Insight by Zonal, Powered by CGA

Technology's role in the customer journey

**How digital solutions can provide guests
with even better experiences from arrival
to departure when they return to restaurants,
pubs and bars in 2021**



Why technology matters to consumers

The pandemic has intensified consumers' use of technology at every stage of their interaction with restaurants, pubs and bars since early 2020. And greater availability and adoption is leading to greater satisfaction: two in five (40%) people agree that tech has improved their experiences, compared to just 11% who disagree. But what do guests like most about it? GO Technology asked consumers to rank their top benefits.



Technology's top five consumer benefits

1 Speed and convenience

Nearly a third (31%) of consumers think the quick and convenient nature of technology is its top benefit. From researching a venue to settling the bill, technology makes it quicker for guests to move through a venue. Convenience is king in so many parts of consumers' lives now, and they see tech as a gateway to that.

2 Ease of ordering

Close behind speed and convenience is the fact that technology makes ordering easy (29%). While many guests still prefer to order face to face, digital menus have given them an appealing new option for ordering food and drinks, both at the table and in advance of a visit.

3 Tracking

Apps and other digital ordering and payment methods make it easier for consumers to stay in control of their finances, and one in six (17%) cites the ability to track their orders as the top benefit of technology. As well as improving their management of restaurant, pub and bar spending, they make delivery and takeaway ordering more convenient (see box).

4 Safety

Technology has given consumers a new layer of protection during the pandemic, and advance bookings, app-based ordering and contactless payment have all helped them feel more confident about going out, and one in seven (14%) consumers cites safety as a top technology benefit. However, as confidence about safety increases in the wake of the vaccine programme, we can expect to see the convenience-related benefits of technology increase even further.

5 Seamless service

Around one in eight (13%) consumers cite seamless service as the top benefit of technology. This proves that technology doesn't have to be visible to consumers to improve their experiences: integrating consumer-friendly solutions with kitchens, stock control, payment technology and many more aspects of operations means service stages can be invisibly joined for seamless service.



Ordering in: how tech has supported consumers in the delivery revolution

CGA's data has shown how delivery and takeaway sales have soared in the last year, helping consumers to recreate the out-of-home experiences they have missed during long periods of lockdown.

As this list of priorities shows, the quality and range of food and drink are just as crucial to delivery as they are in eating-out. But time-related issues like short waiting periods and quick ordering and payment are important too — as are 'extras' like tracking orders and personalising experiences. Technology has a major part to play in meeting these and many more needs, and has made it easier than ever for consumers to order in. As lockdown eases, the big question is to what extent people start to cut their delivery spending in favour of out-of-home visits?

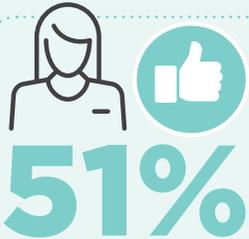
What are your top priorities for an enjoyable at-home experience via delivery or click and collect?



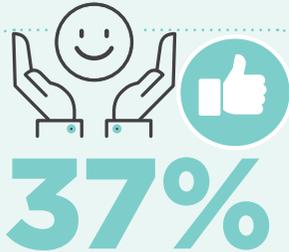
Four steps to better service

GO Technology's survey reveals consumers' priorities and pain points at four key stages of their visits—arrival, placing orders, receiving orders and settling bills—and highlights how technology can drive improvements at each step.

1. Arrival



Of consumers prefer to be welcomed in person when they arrive—but this drops to 41% of 18 to 24 year-olds

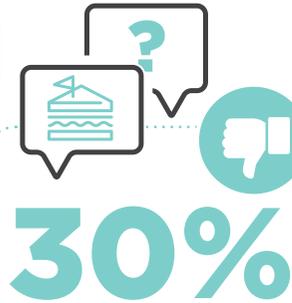


Prefer to be welcomed as a regular customer

2. Placing orders



Of consumers say friendly and helpful service is the most important aspect of placing orders—rising to 36% in cafes but dropping to 20% in late-night bars



Say struggling to get servers' attention is the most frustrating part of ordering—rising to 36% in pubs but dropping to 18% in late-night bars

What consumers want

First impressions count in hospitality, and greeting guests warmly can get their experiences off to a great start. More than a third (37%) of consumers like to be recognised as regulars when they step into a venue, and that number rises to nearly half (46%) among visitors to late-night bars, where familiarity and VIP treatment can be particularly powerful. This kind of hosting is less important in food-led and quick service venues though, where a more general friendly greeting is preferred.

Where technology comes in

By integrating booking systems with guests' previous visits, venues can get a holistic view of their preferences. That can help staff to prepare personalised arrivals—by showing guests to a preferred table, for example, or suggesting menu items based on past orders. A tailored approach is crucial though, as not everyone will appreciate venues researching their habits.

What consumers want

GO Technology's research reveals the three clear priorities for consumers when they order their food and drinks: friendly, efficient and knowledgeable service. Similar concerns emerge when guests are asked about their biggest frustrations in the ordering process (see box). Identifying the appropriate speed of service is paramount: not so fast that guests feel rushed, but not so slow that they feel neglected.

Where technology comes in

Technology can't make servers more friendly, but it can give them the tools they need to do their job well. Digital ordering and payment processes ease the pressure on teams on the floor and help them avoid duplication of tasks—like taking orders by hand then entering them into a till. That frees up servers to spend more time at tables or respond promptly to guests' needs. Technology can also give staff easier access to availability information and answers to common queries about dishes, equipping them with better knowledge for better service.



The three top frustrations of placing orders in pubs, bars or restaurants



Struggling to get my server's attention



Items I want not being available



Being rushed to place my order

3. Receiving orders



29%

Of consumers think food being perfectly cooked and served at the right temperature is the most important aspect of receiving orders



24%

Think waiting too long is the most frustrating aspect of receiving orders

What consumers want

Well over a quarter (29%) of consumers prioritise the cooking and temperature aspects of food when they receive their orders. Those factors rank well ahead of other aspects, like delivery of food and drinks within a reasonable time (19%), receiving everything that has been ordered (13%) and the attentiveness of staff in delivery (12%). In the same vein, speed, temperature and accuracy emerge as the three biggest bugbears of receiving orders (see box). But it's important to remember that delivery is more about timing than speed, because serving food too quickly can damage perceptions of quality.

Where technology comes in

Digital solutions that improve communication between front of house teams and kitchens can solve all three of guests' top frustrations when receiving orders—by speeding up service, facilitating swift delivery of food when it's cooked, and ensuring everything that is ordered is delivered.

4. Settling bills



18%

Of consumers think being able to pay immediately, and a wide choice of payment options, are the most important aspects of settling bills



18%

Think automatically adding service charge is the most frustrating aspect of settling bills

What consumers want

The last impressions of a visit are as important as the first, and making it quick and easy to settle bills leaves guests with positive impressions. Being able to pay immediately and by the method they prefer emerge as the two top priorities in the GO Technology research, while a long list of frustrations is led by the automatic addition of a service charge (18%), an incorrect bill (14%), struggling to get a server's attention (14%) and having to wait to get their bill (11%).

Where technology comes in

The growing popularity of app-based payment is speeding up the bill stage of customers' journeys, while handheld readers have made things quicker for card users. Digital ordering solutions meanwhile improve accuracy, and can help to facilitate requests to split bills.



Top three frustrations when it comes to receiving orders in pubs, bars or restaurants

24%

Waiting too long for the order

20%

My order being wrong

20%

My food being cold

The view from CGA

“Restaurants, pubs and bars have worked very hard at integrating technology into their operations in the last few years, and this research shows that their efforts are paying off. Digital solutions are making consumers’ journeys through venues easier, faster and safer, and an industry that once lagged behind others in its adoption of technology is taking great strides forward.

As they get back to eating and drinking out, consumers will be engaging with technology more deeply than ever before, and it is going to be a key battleground for market share in 2021 and beyond. Ensuring that all digital solutions provide a genuine benefit, and balancing them with the face-to-face elements of hospitality that people have missed so much, will be crucial. The businesses that can make best use of tech at both front and back of house could well be the quickest to recover in the months ahead.”

Karl Chessell, Business Unit Director – Hospitality Operators and Food, EMEA

The view from Zonal

“Although many aspects of hospitality were gradually becoming more digitised even before the pandemic, the last 12 months have certainly accelerated this adoption. What this new research shows is that having accepted the technology, consumers now see how it improves their hospitality experiences.

“This is because technology not only removes pain points that have always existed, such as not being able to get the attention of a server or having to wait too long to settle the bill, but it also helps operators deliver more tailored and personalised experiences to their guests. Letting technology take some of the strain of service also frees up staff to concentrate on those elements that consumers rate so highly like greeting guests and swiftly answering queries. Businesses that can offer customers such a journey will reap the rewards this year and beyond.”

Alison Vasey, Group Product Director, Zonal

About the data

This report is based on figures from Zonal and CGA’s GO Technology survey, a sample of 5,000 nationally representative British consumers. All figures are taken from the February 2021 edition of the survey.



For further information on GO Technology, please contact info@zonal.co.uk