Restaurant Scene 2022:
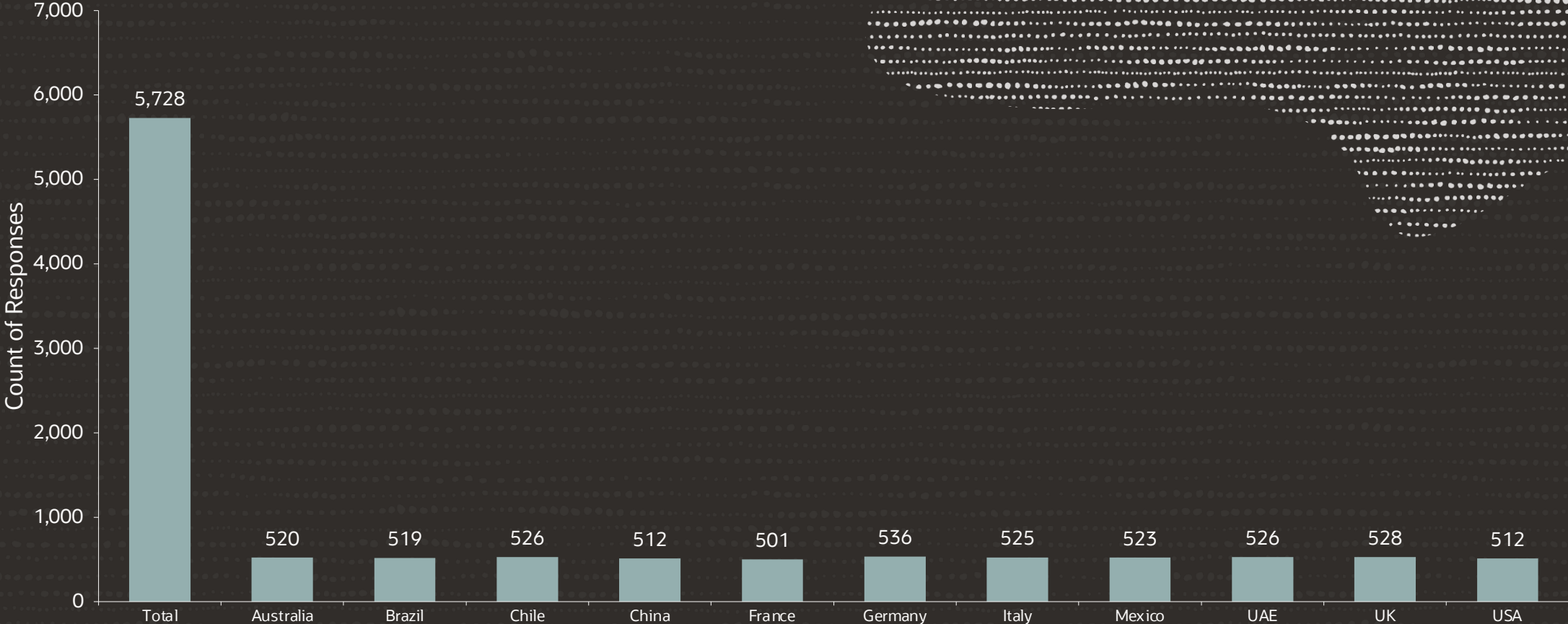## 4 Global Trends | 30 Key Stats

ORACLE

Restaurant Scene 2022: Preface

The following data is based on a global survey, commissioned by Oracle and conducted by independent research firm, Untold Insights.

The results represent the sentiments of over 5,700 consumers across 11 geographies (Australia, Brazil, Chile, China, France, Germany, Italy, Mexico, UAE, UK and US).

Our findings show optimism, openness and a rising demand for using technology throughout the food and beverage customer experience. It also illustrates the positive impact of technology-led journeys on loyalty, spend and overall influence. Finally, we see a strong correlation with transparency from restaurant brands on sustainability and environmental impact initiatives with attracting and retaining new customers.

Restaurant Scene 2022: Global Study Demographics

Count of Responses

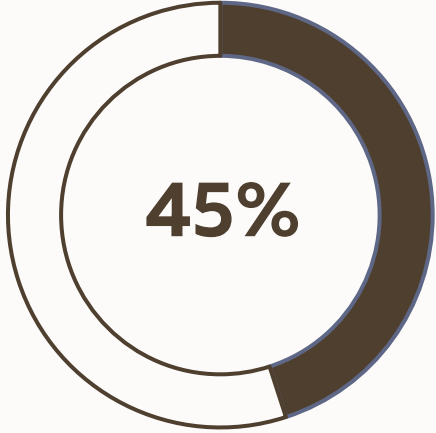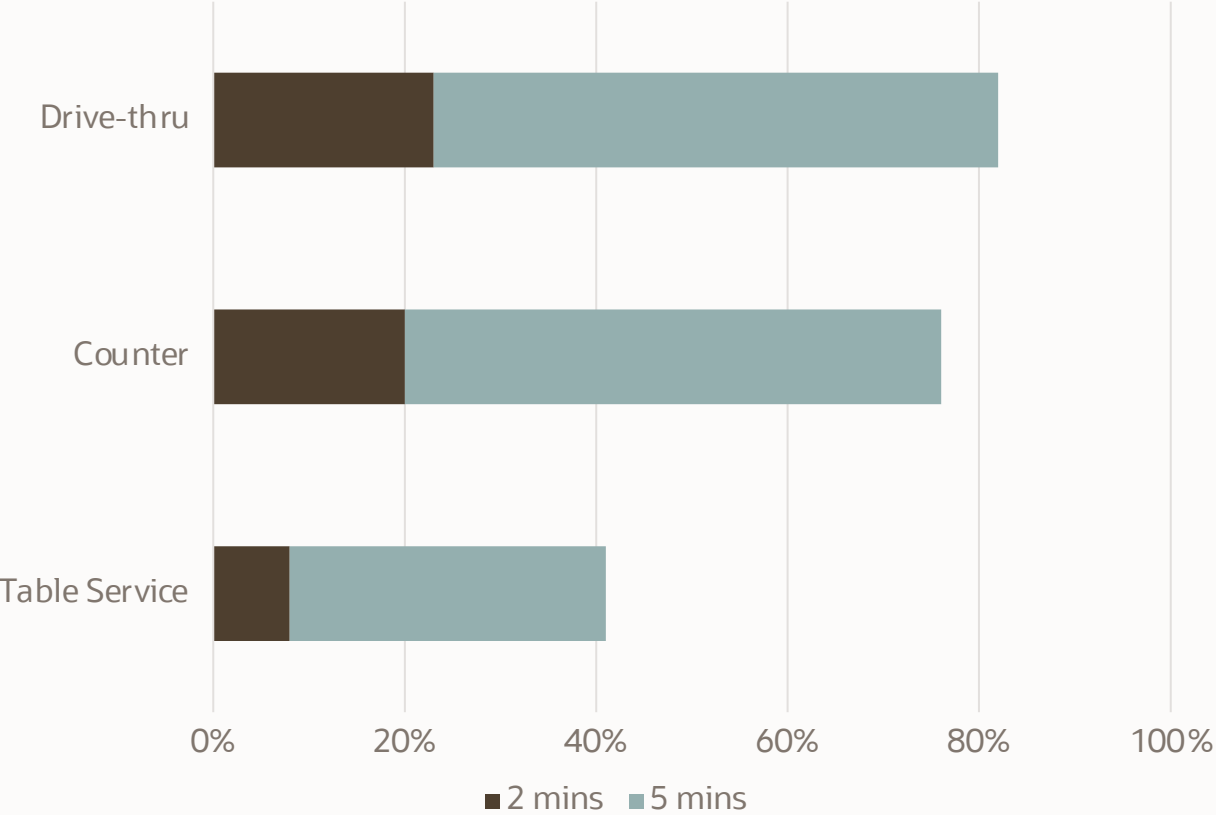|		
Total	5,728	
Australia	520	
Brazil	519	
Chile	526	
China	512	
France	501	
Germany	536	
Italy	525	
Mexico	523	
UAE	526	
UK	528	
USA	512	

Sample Size = 5,728

Global Trend 1: Incremental Off-premises Demand Impacting CSAT

Time before customers are annoyed waiting to order

45% of consumers feel **wait time** is **longer** when **ordering in-person**
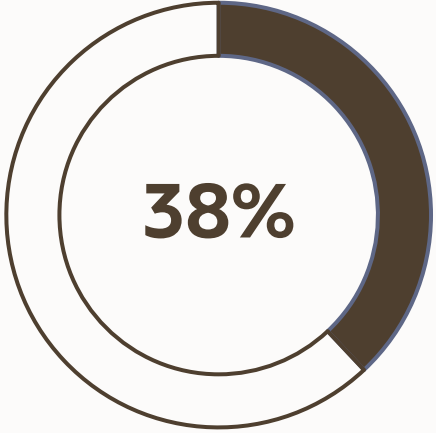
38% of consumers dining-in feel **deprioritized compared to online orders**

Global Trend 2: Click and Collect Positively Influences Spend and Loyalty

% who'd spend more if click and collect was available

59% global avg

Country	
France	
Australia	
Germany	
Italy	
United Kingdom	
United States	
Chile	
Brazil	
Mexico	
UAE	
China	

0%   20%   40%   60%   80%   100%

63%
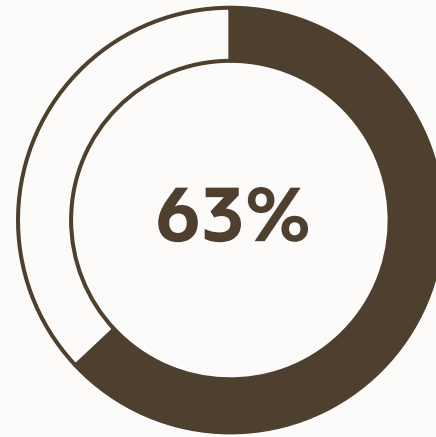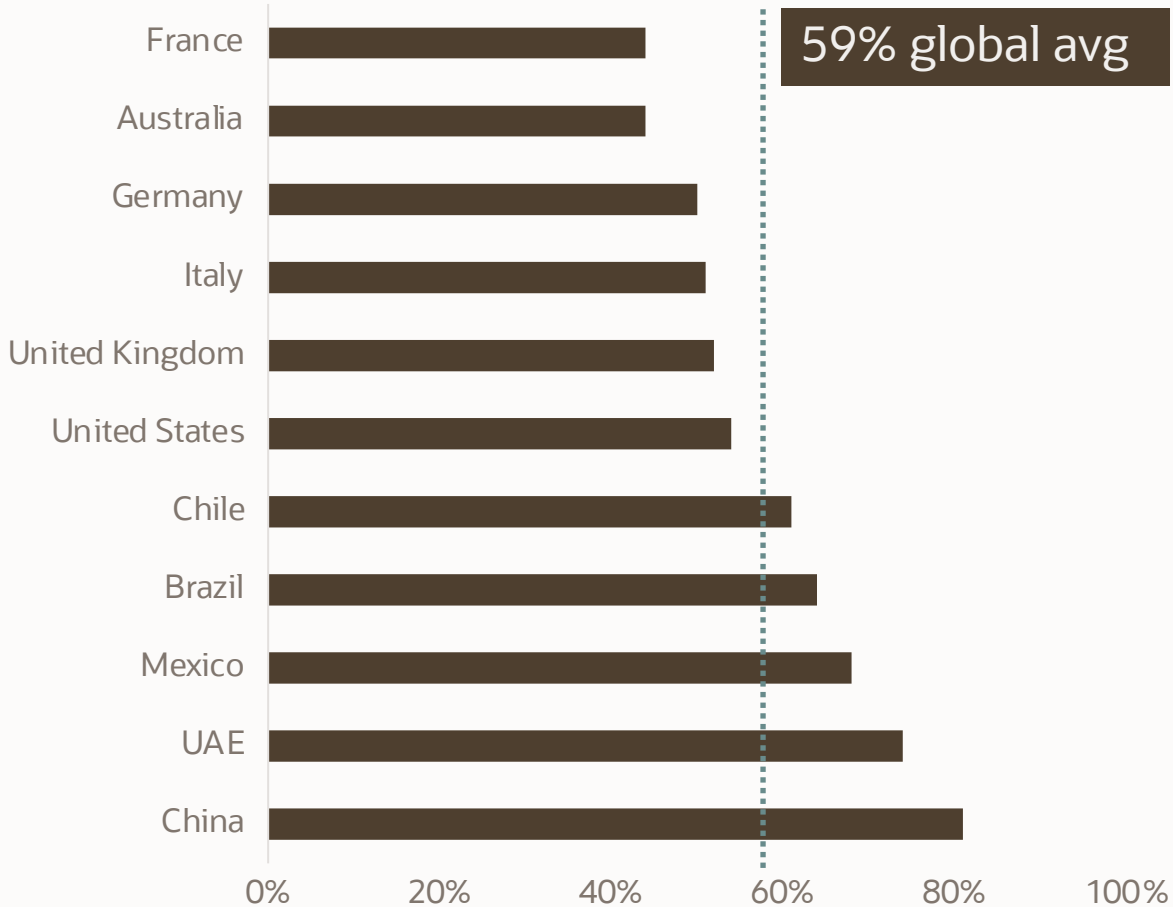
of consumers said, "I **love it & it positively impacts where** I eat"

44%
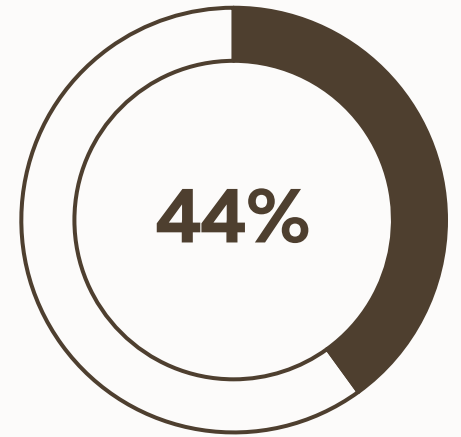
of consumers said, "it makes me **more loyal"**

Global Trend 3: Consumers Want Data-informed Personal Offers

% love the idea of personal offers based on data vs. willing to share data

	Love the Option	Will Share Data
Purchase history	45%	35%
Dietary preferences	46%	30%
Related brands	48%	16%

■ Love the Option ■ Will Share Data
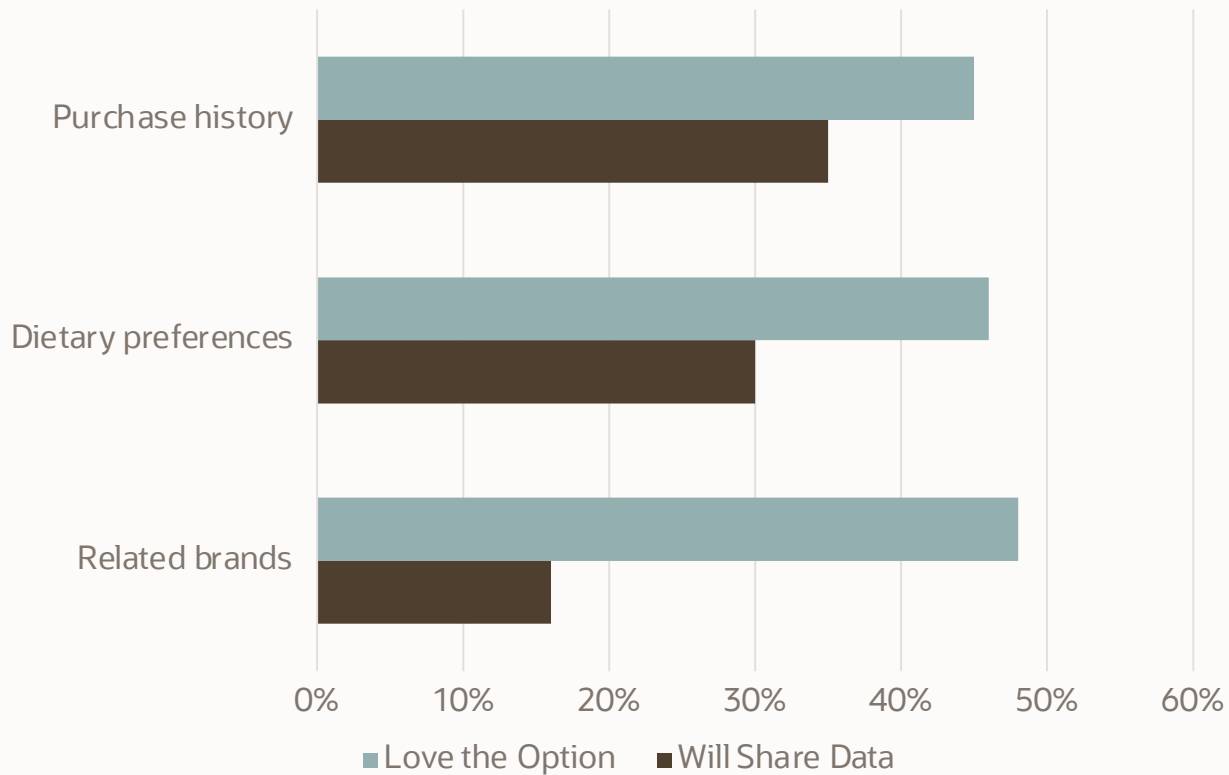
% who want visibility and control of data sharing

France	38%
China	41%
Germany	42%
Italy	44%
Chile	45%
United Kingdom	46%
Australia	51%
UAE	52%
Mexico	55%
United States	56%
Brazil	63%

48% global avg
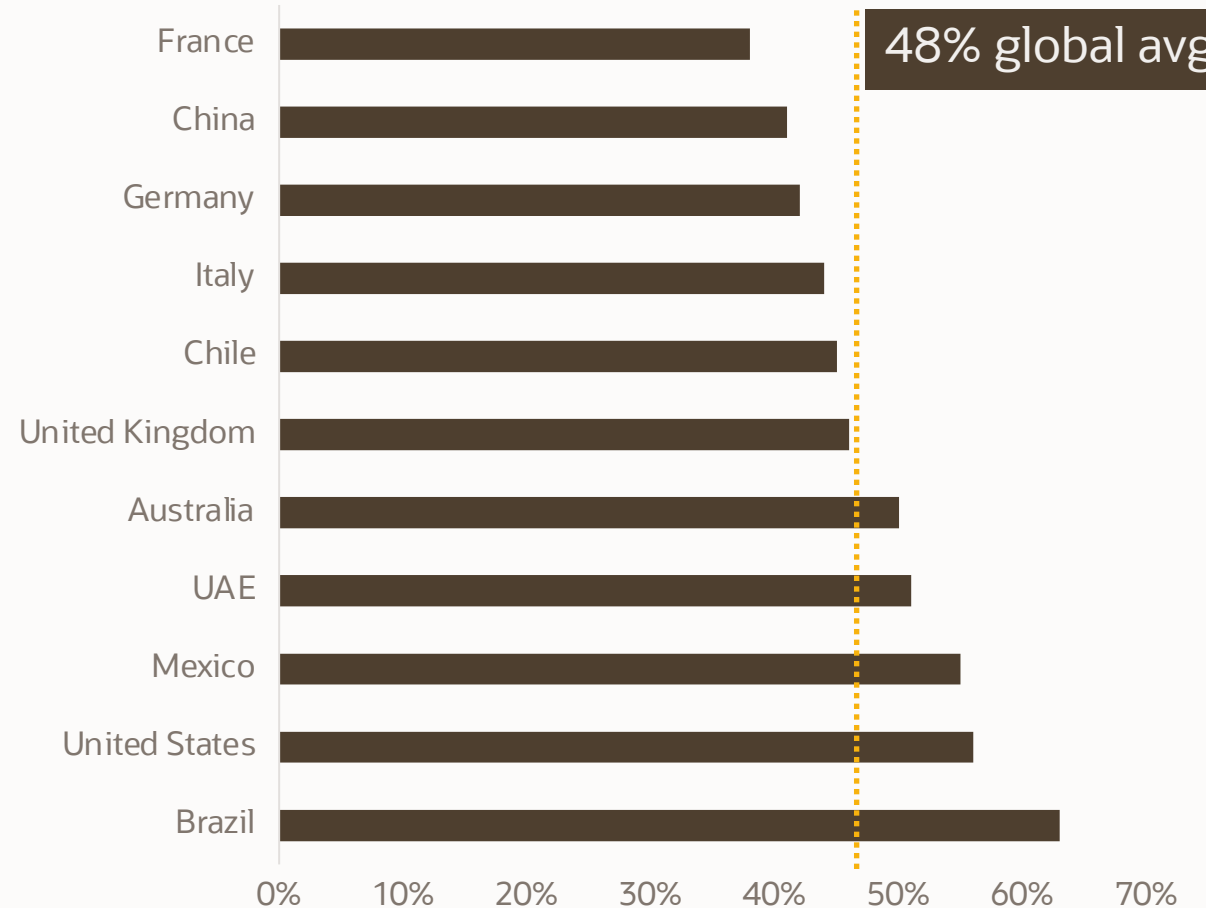
Global Trend 4: Environment, sustainability initiatives have significant influence
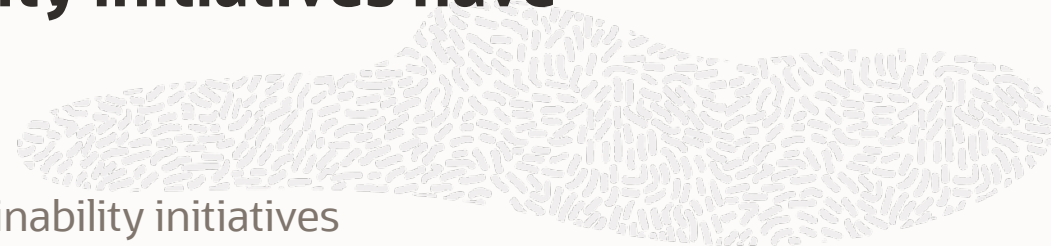
% consumers influenced by sustainability initiatives

Category	Value
Offer low / zero emission delivery	~42%
Biodegradable / recyclable packaging	~49%
Bring your own cups / refill	~80%
Social commitment transparency	~87%
Clear labeling of ingredient source	~91%
Efforts to lower food waste	~93%
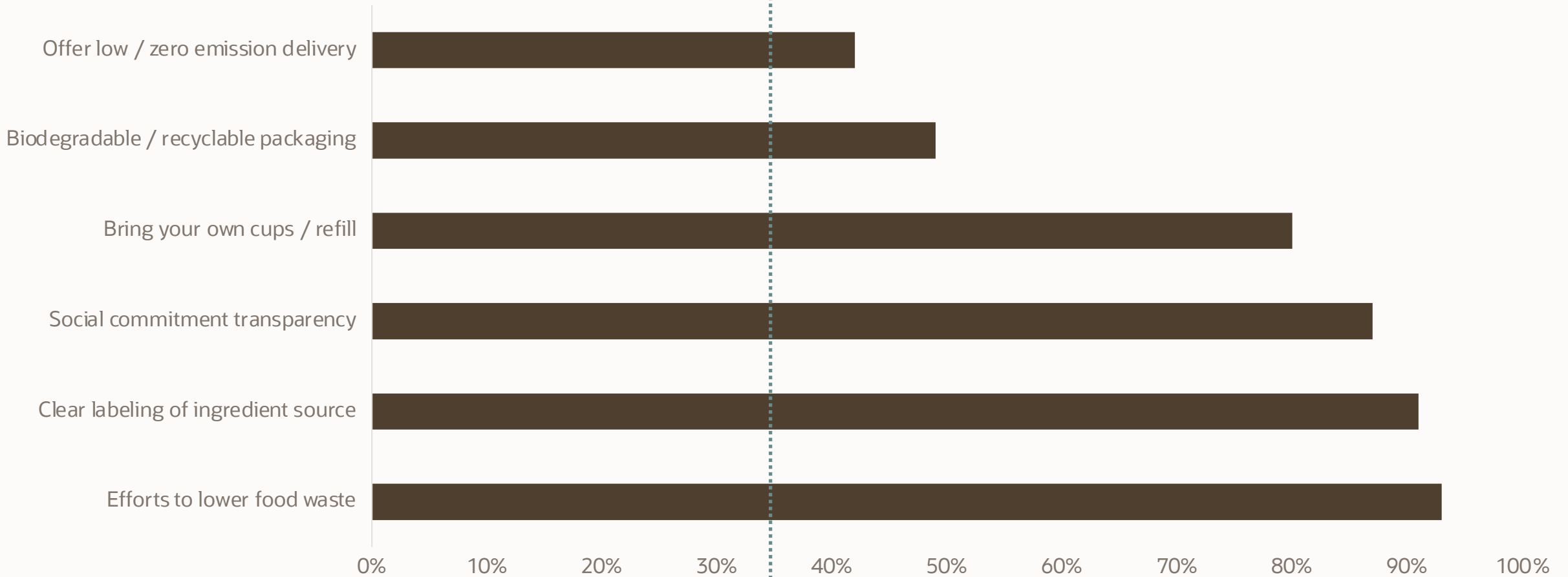
33% rated important in April 2021

30 Restaurant Consumer Trend Comparisons by Country

Consumer dine-in frequency plan for next 3-6 months

Column %

	Total	Australia	Brazil	Chile	China	France	Germany	Italy	Mexico	UAE	UK	USA
Never	5%	8%	5%	4%	2%	5%	7%	3%	2%	0%	7%	7%
Less often	17%	28%	20%	16%	4%/11%	22%	24%	17%	13%	6%	21%	18%
Once or twice a month	36%	37%	29%	44%	49%	50%	41%	41%	33%	32%	44%	29%
Once or twice a week	34%	25%	40%	33%	35%	17%	21%	36%	48%	51%	21%	36%
Every day	8%	3%	6%	3%		6%	7%	3%	5%	11%	5%	10%

Legend:
- Never
- Less often
- Once or twice a month
- Once or twice a week
- Every day
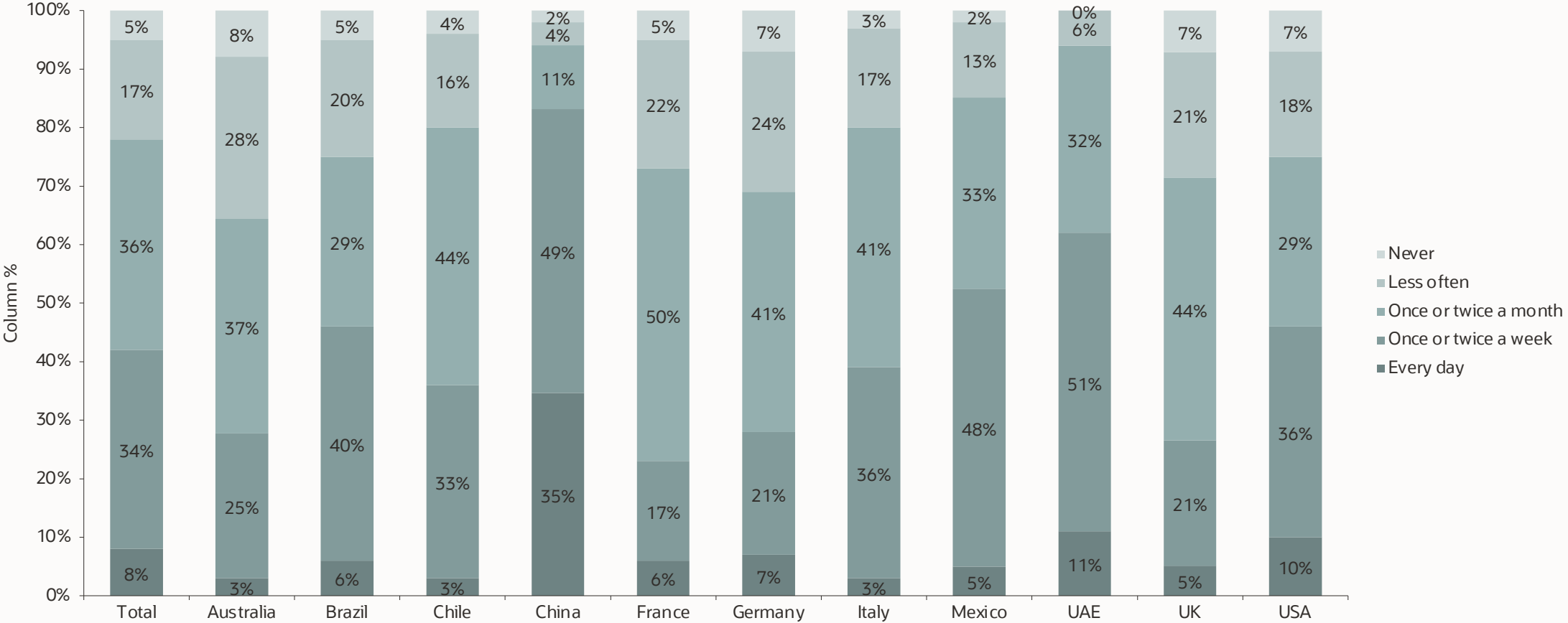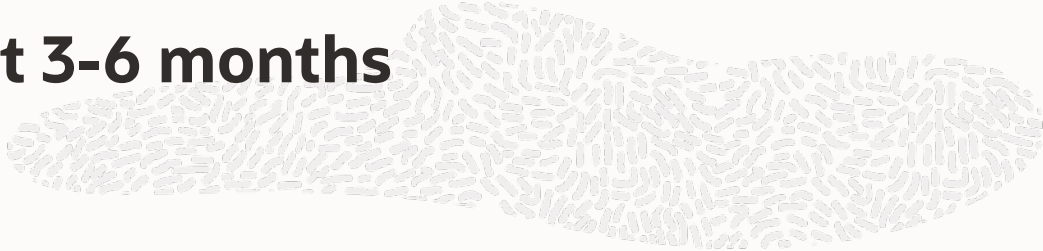
Sample Size = 5,728

Ordering preferences and wait tolerance

Preferred way to order, dining-in at a restaurant

Column %

	Total	Australia	Brazil	Chile	China	France	Germany	Italy	Mexico	UAE	UK	USA
Voice assistant	2%	3%	2%	2%	1%	3%	1%	3%	2%	4%	3%	4%
Self-service kiosk	7%	9%	7%	5%	5%	8%	5%	7%	5%	10%	5%	8%
Google or social	5%	3%	3%	6%	1%	3%	5%	5%	4%	12%	5%	5%
3rd Party mobile app	9%	6%	10%	14%	10%	8%	9%	8%	10%	10%	8%	8%
Restaurant mobile app	13%	9%	20%	16%	20%	10%	10%	10%	12%	13%	11%	10%
In-person interaction	64%	71%	59%	58%	63%	68%	70%	66%	67%	51%	68%	65%
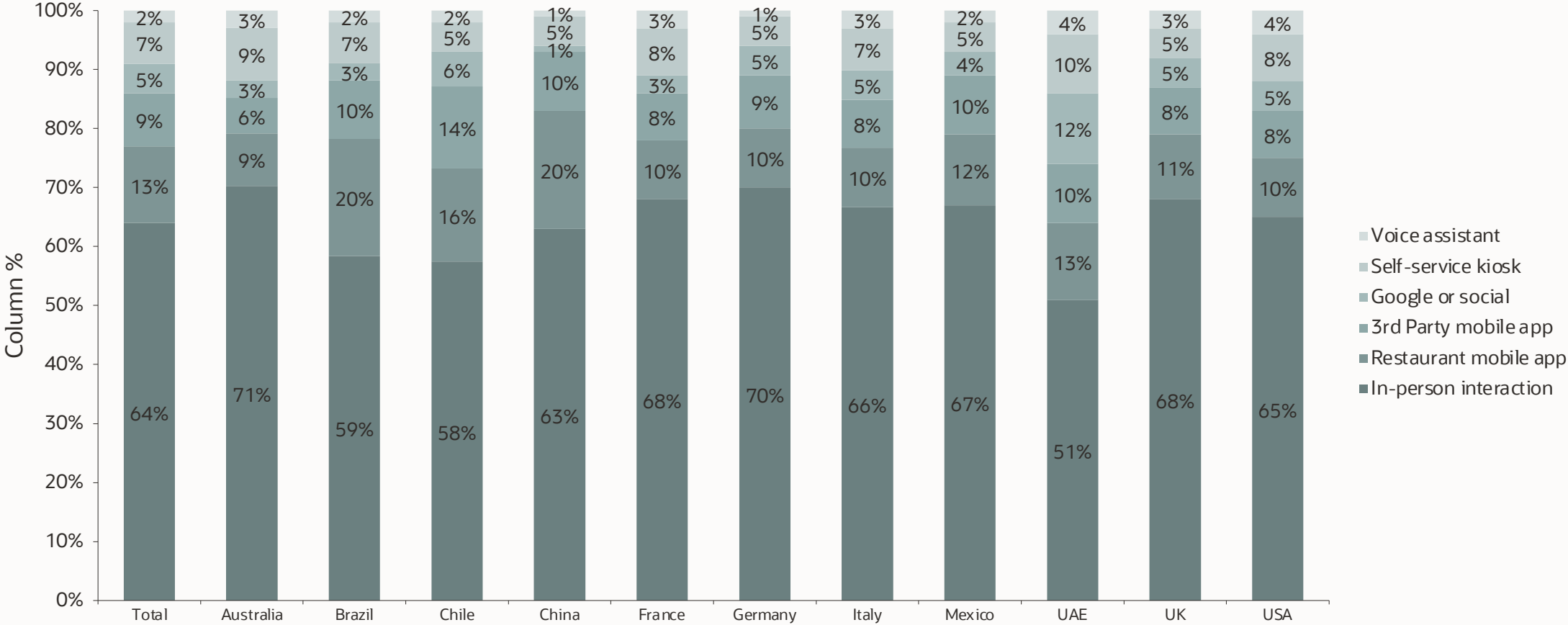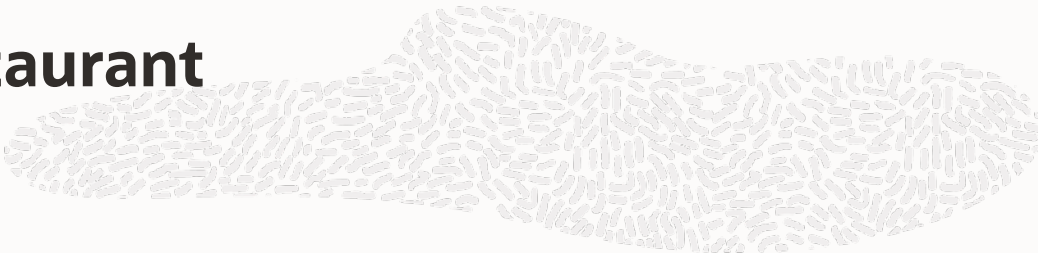
Sample Size = 5,728

Preferred way to order, when getting takeout

Column %

	Total	Australia	Brazil	Chile	China	France	Germany	Italy	Mexico	UAE	UK	USA
Voice assistant	4%	4%	2%	4%	3%	5%	3%	6%	4%	5%	6%	7%
Self-service kiosk	9%	10%	7%	6%	5%		12%	10%	6%	6%	9%	8%
Google or social	8%	5%	6%	10%	5%	17%	6%	8%	6%	13%	7%	10%
3rd Party mobile app	27%	26%	26%	34%	34%	7%	16%	26%	38%	32%	26%	18%
Restaurant mobile app	32%	30%	34%	32%	45%	24%	29%	31%	25%	35%	31%	33%
In-person interaction	20%	26%	25%	13%	9%	28%	33%	18%	20%	10%	21%	25%

Legend:
- Voice assistant
- Self-service kiosk
- Google or social
- 3rd Party mobile app
- Restaurant mobile app
- In-person interaction

Sample Size = 5,728

Preferred way to order, at the drive-thru

Sample Size = 5,728

Legend: Voice assistant, Self-service kiosk, Google or social, 3rd Party mobile app, Restaurant mobile app, In-person interaction

	Total	Australia	Brazil	Chile	China	France	Germany	Italy	Mexico	UAE	UK	USA
Voice assistant	6%	8%	4%	4%	4%	4%	3%	10%	6%	10%	8%	7%
Self-service kiosk	18%	13%	11%	15%	22%	22%	20%	19%	24%	20%	19%	10%
Google or social	7%	6%	3%	10%	4%	8%	8%	11%	4%	10%	6%	8%
3rd Party mobile app	19%	10%	20%	23%	26%	21%	14%	20%	15%	23%	14%	20%
Restaurant mobile app	22%	19%	28%	30%	33%	23%	16%	18%	26%	18%	17%	18%
In-person interaction	28%	44%	33%	18%	11%	22%	39%	22%	25%	20%	36%	38%

Consumer sentiment on whether in-person orders take <u>significantly</u> longer than order-ahead and drive-thru customers

Column %

	Total	Australia	Brazil	Chile	China	France	Germany	Italy	Mexico	UAE	UK	USA
Disagree	18%	20%	21%	16%	9%	22%	25%	16%	17%	15%	17%	25%
Neutral	36%	36%	27%	39%	30%	47%	44%	45%	37%	30%	35%	28%
Agree	45%	44%	52%	45%	61%	32%	31%	39%	46%	55%	48%	47%
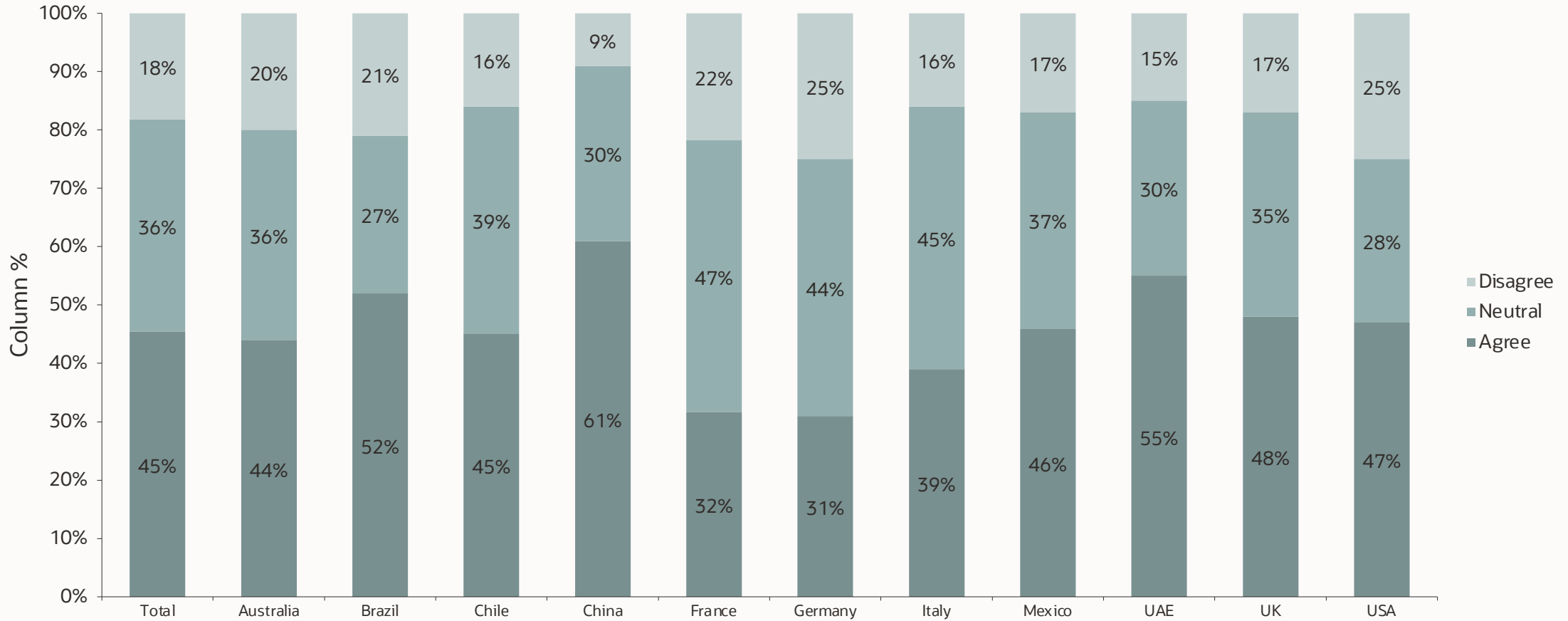
Sample Size = 5,728

Consumer sentiment on whether online and delivery orders are prioritized over in-person customers

Sample Size = 5,728

Legend: Disagree, Neutral, Agree

	Total	Australia	Brazil	Chile	China	France	Germany	Italy	Mexico	UAE	UK	USA
Disagree	20%	17%	22%	18%	7%	21%	26%	22%	24%	18%	18%	21%
Neutral	43%	44%	33%	43%	46%	44%	48%	41%	39%	45%	45%	44%
Agree	38%	39%	45%	39%	47%	36%	26%	37%	36%	37%	37%	34%
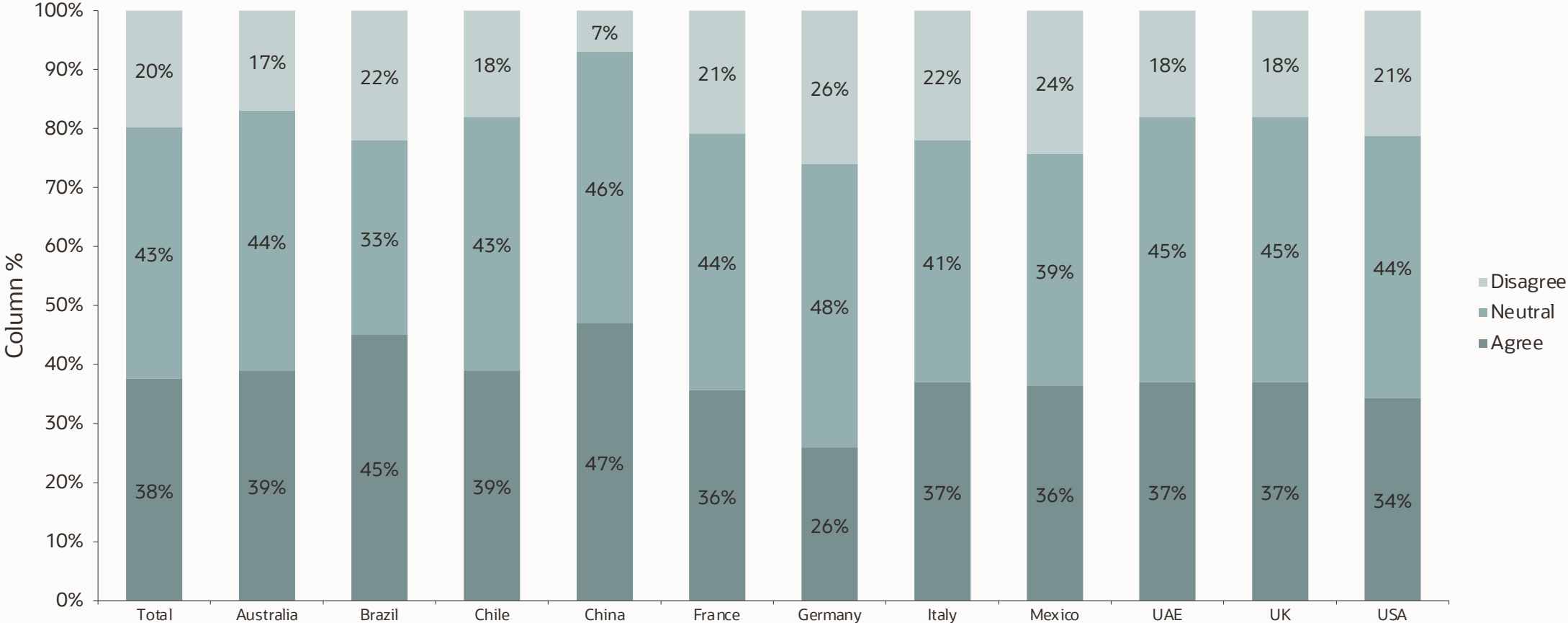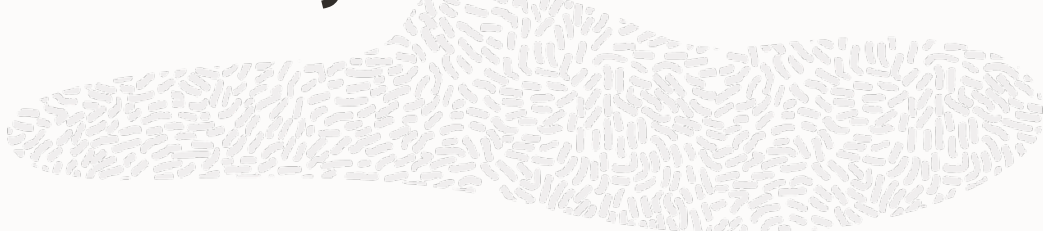
Consumer sentiment on the restaurant atmosphere impact of delivery riders and drivers picking up orders

Column %

	Total	Australia	Brazil	Chile	China	France	Germany	Italy	Mexico	UAE	UK	USA
Disagree	34%	31%	43%	34%	24%	26%	29%	35%	46%	32%	31%	40%
Neutral	37%	38%	33%	40%	44%	43%	38%	42%	35%	32%	36%	31%
Agree	29%	30%	24%	26%	31%	31%	32%	22%	19%	36%	33%	29%
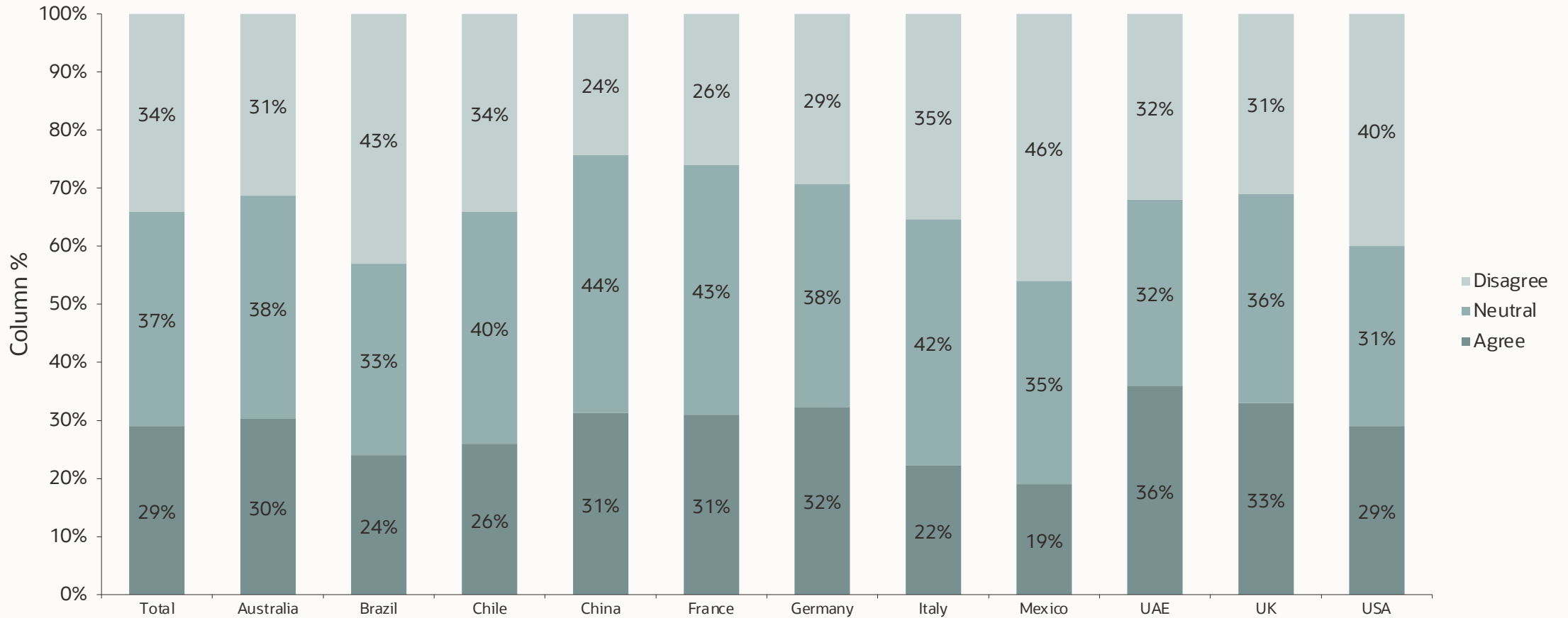
Sample Size = 5,728

Time before consumers are annoyed, waiting to order when seated at a table in a restaurant

Column %

	Total	Australia	Brazil	Chile	China	France	Germany	Italy	Mexico	UAE	UK	USA
20 minutes or more	18%	16%	15%	29%	14%	14%	16%	21%	23%	20%	20%	14%
15 minutes	19%	20%	15%	17%	22%	24%	21%	26%	17%	17%	17%	14%
10 minutes	30%	32%	29%	27%	27%	31%	34%	33%	29%	25%	34%	27%
5 minutes	25%	26%	32%	21%	25%	25%	24%	16%	24%	23%	23%	33%
2 minutes	6%	5%	6%	4%	8%	5%	4%	2%	6%	10%	5%	9%
1 minute	2%	1%	3%	1%	4%	1%	1%	2%	2%	4%	2%	2%

Sample Size = 5,728

Time before consumers are annoyed, waiting to order when ordering at a counter

Column %

	Total	Australia	Brazil	Chile	China	France	Germany	Italy	Mexico	UAE	UK	USA
20 minutes or more	8%	7%	9%	15%	10%	3%	5%	6%	14%	10%	6%	6%
15 minutes	11%	6%	7%	15%	12%	10%	8%	12%	15%	13%	9%	8%
10 minutes	25%	20%	19%	28%	26%	27%	24%	34%	27%	28%	27%	21%
5 minutes	36%	41%	39%	26%	32%	42%	41%	35%	29%	30%	43%	35%
2 minutes	16%	21%	21%	13%	14%	15%	18%	11%	10%	15%	13%	23%
1 minute	4%	5%	5%	3%	5%	3%	4%	2%	5%	4%	2%	6%

Sample Size = 5,728

Time before consumers are annoyed, waiting to order when ordering in a drive-thru

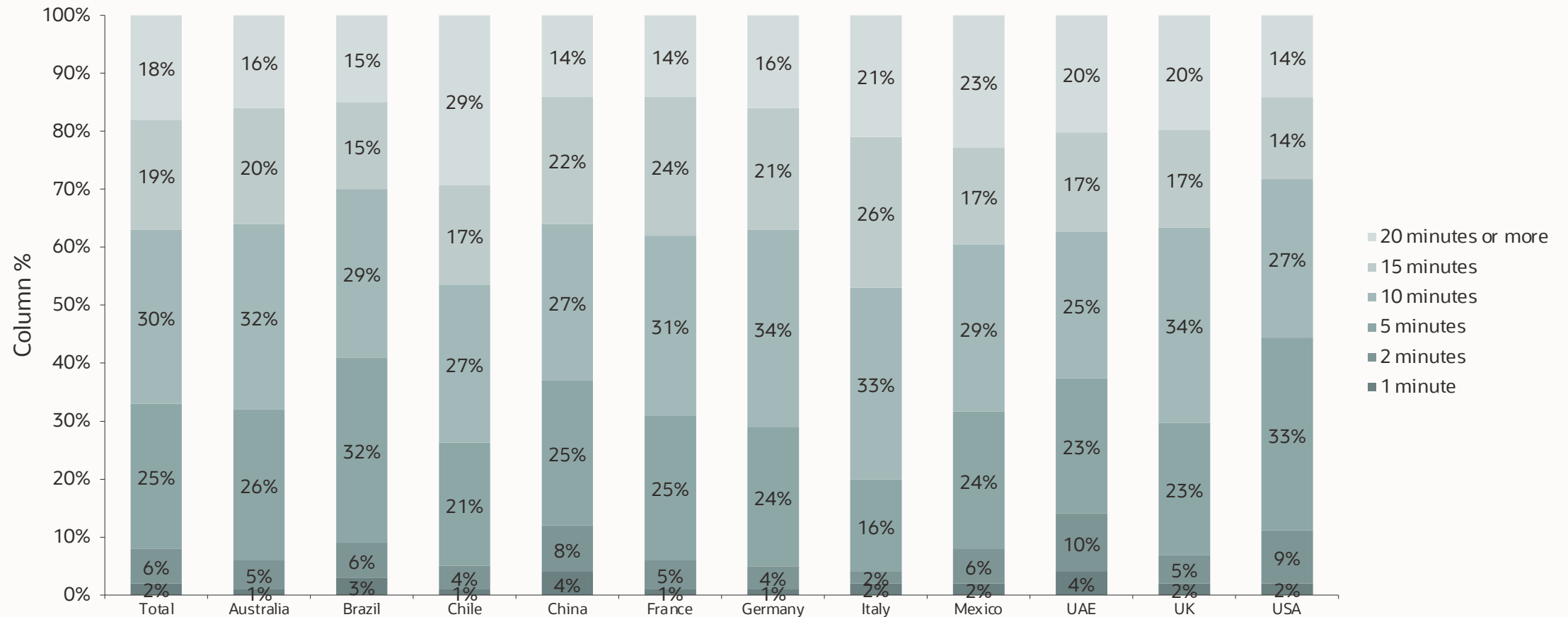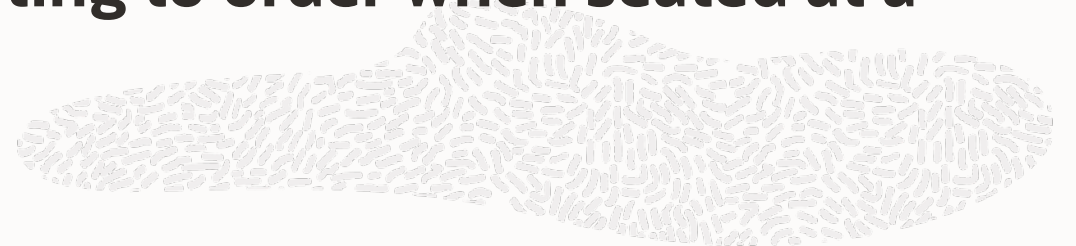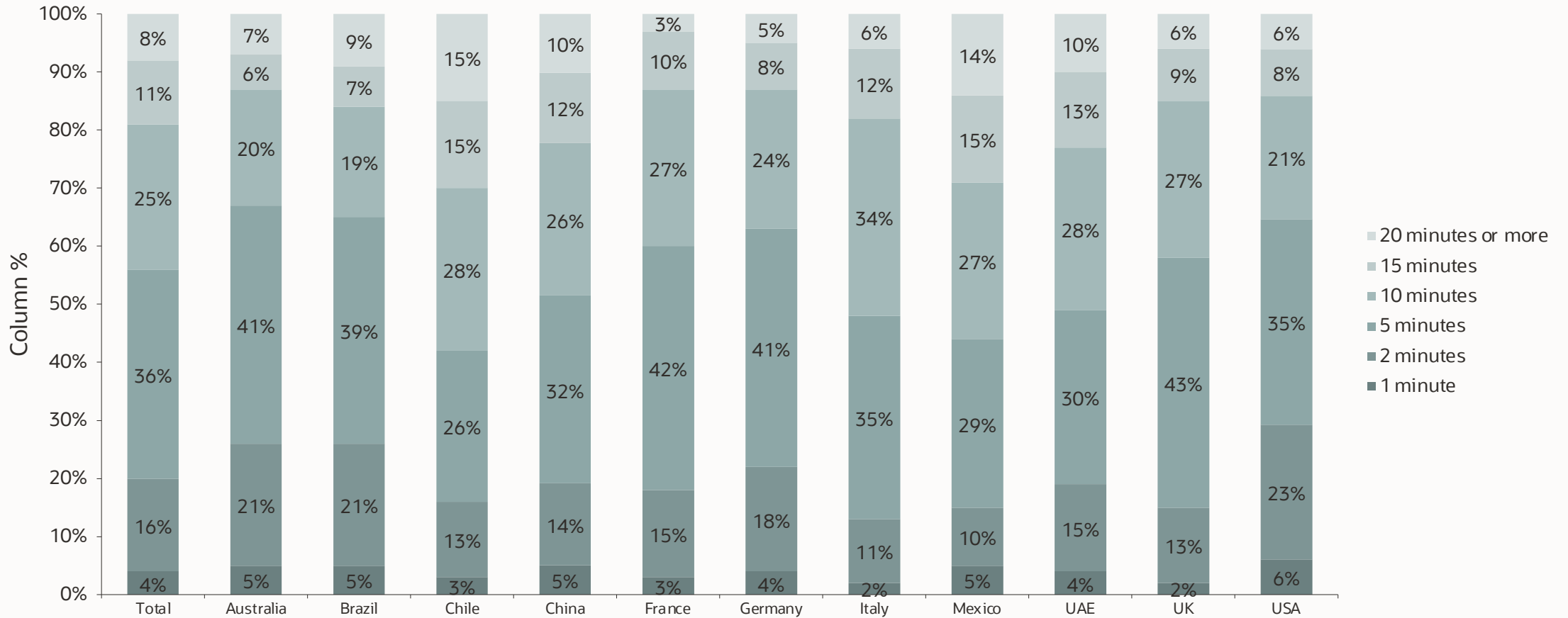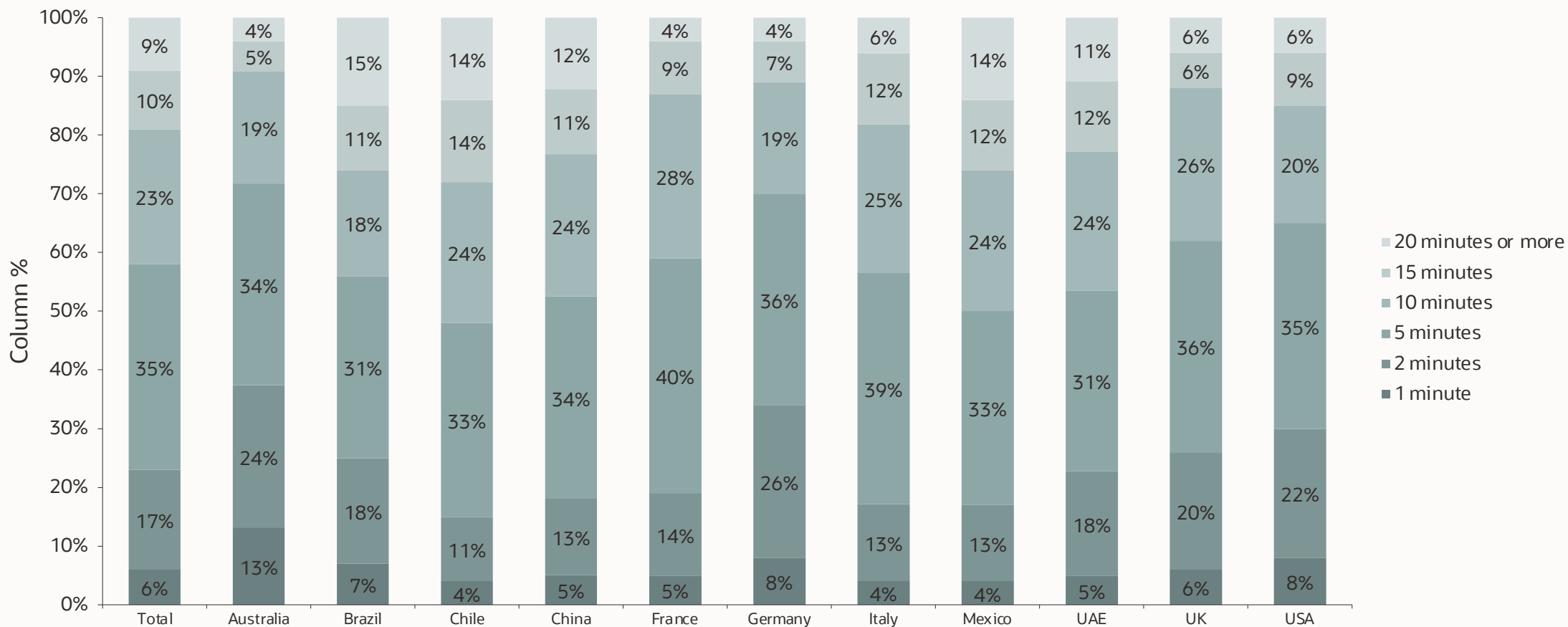Sample Size = 5,728

Time before consumers are annoyed, waiting to receive their order when seated at a table in a restaurant

Column %

	Total	Australia	Brazil	Chile	China	France	Germany	Italy	Mexico	UAE	UK	USA
20 minutes or more	31%	40%	30%	43%	21%	18%	37%	32%	38%	24%	35%	24%
15 minutes	24%	23%	20%	24%	26%	26%	23%	29%	26%	21%	23%	23%
10 minutes	24%	18%	24%	21%	26%	33%	23%	23%	22%	25%	22%	24%
5 minutes	15%	13%	18%	10%	19%	17%	12%	12%	11%	18%	16%	19%
2 minutes	5%	4%	6%	3%	5%	5%	3%	3%	2%	7%	4%	8%
1 minute	2%	1%	3%	0%	2%	1%	1%	1%	1%	5%	1%	3%

Sample Size = 5,728

Time before consumers are annoyed, waiting to receive their order when ordering at a counter

Column %

	Total	Australia	Brazil	Chile	China	France	Germany	Italy	Mexico	UAE	UK	USA
20 minutes or more	13%	13%	13%	24%	14%	6%	6%	8%	22%	12%	12%	8%
15 minutes	18%	14%	18%	23%	21%	14%	15%	21%	22%	20%	18%	17%
10 minutes	32%	32%	28%	29%	32%	34%	33%	37%	36%	29%	30%	31%
5 minutes	28%	31%	28%	19%	27%	35%	35%	26%	15%	27%	31%	30%
2 minutes	8%	8%	11%	5%	5%	8%	8%	6%	3%	10%	8%	11%
1 minute	2%	1%	3%	1%	1%	3%	2%	2%	2%	3%	2%	4%

Sample Size = 5,728

Time before consumers are annoyed, waiting to receive their order when ordering in a drive-thru

Column %

	Total	Australia	Brazil	Chile	China	France	Germany	Italy	Mexico	UAE	UK	USA
20 minutes or more	12%	8%	19%	21%	18%	6%	5%	8%	21%	12%	9%	7%
15 minutes	13%	9%	14%	16%	16%	13%	13%	17%	15%	15%	10%	10%
10 minutes	28%	25%	27%	26%	26%	34%	26%	32%	31%	29%	31%	27%
5 minutes	33%	40%	29%	27%	29%	34%	40%	32%	26%	30%	35%	36%
2 minutes	11%	16%	9%	8%	8%	11%	12%	10%	6%	12%	12%	15%
1 minute	3%	2%	3%	2%	3%	2%	4%	2%	2%	3%	3%	4%

Legend:
- 20 minutes or more
- 15 minutes
- 10 minutes
- 5 minutes
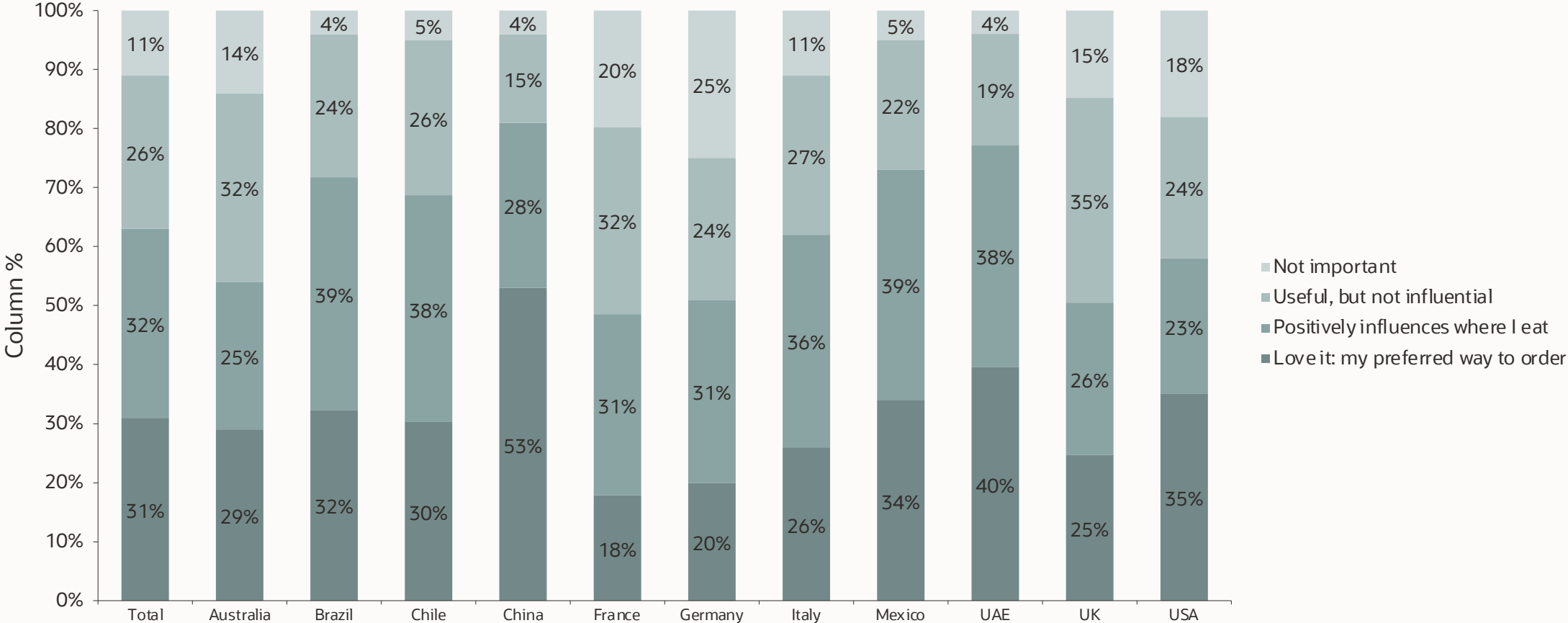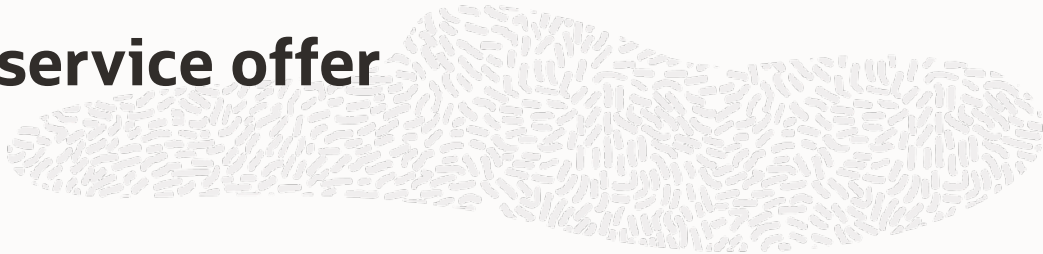- 2 minutes
- 1 minute

Sample Size = 5,728   Source: Untold Insights

Click and collect influence on spend and loyalty

Consumer sentiment on click and collect service offer

Column %

	Total	Australia	Brazil	Chile	China	France	Germany	Italy	Mexico	UAE	UK	USA
Not important	11%	14%	4%	5%	4%	20%	25%	11%	5%	4%	15%	18%
Useful, but not influential	26%	32%	24%	26%	15%	32%	24%	27%	22%	19%	35%	24%
Positively influences where I eat	32%	25%	39%	38%	28%	31%	31%	36%	39%	38%	26%	23%
Love it: my preferred way to order	31%	29%	32%	30%	53%	18%	20%	26%	34%	40%	25%	35%

Legend:
- Not important
- Useful, but not influential
- Positively influences where I eat
- Love it: my preferred way to order

Sample Size = 5,728

Consumer sentiment on click and collect's impact on their loyalty

Column %

	Total	Australia	Brazil	Chile	China	France	Germany	Italy	Mexico	UAE	UK	USA
Irrelevant to me	14%	17%	7%	9%	4%	19%	27%	11%	9%	7%	17%	22%
Does not influence my loyalty	42%	52%	34%	42%	38%	54%	45%	43%	31%	37%	51%	34%
Makes me more loyal	44%	31%	59%	49%	58%	27%	27%	45%	60%	56%	32%	43%
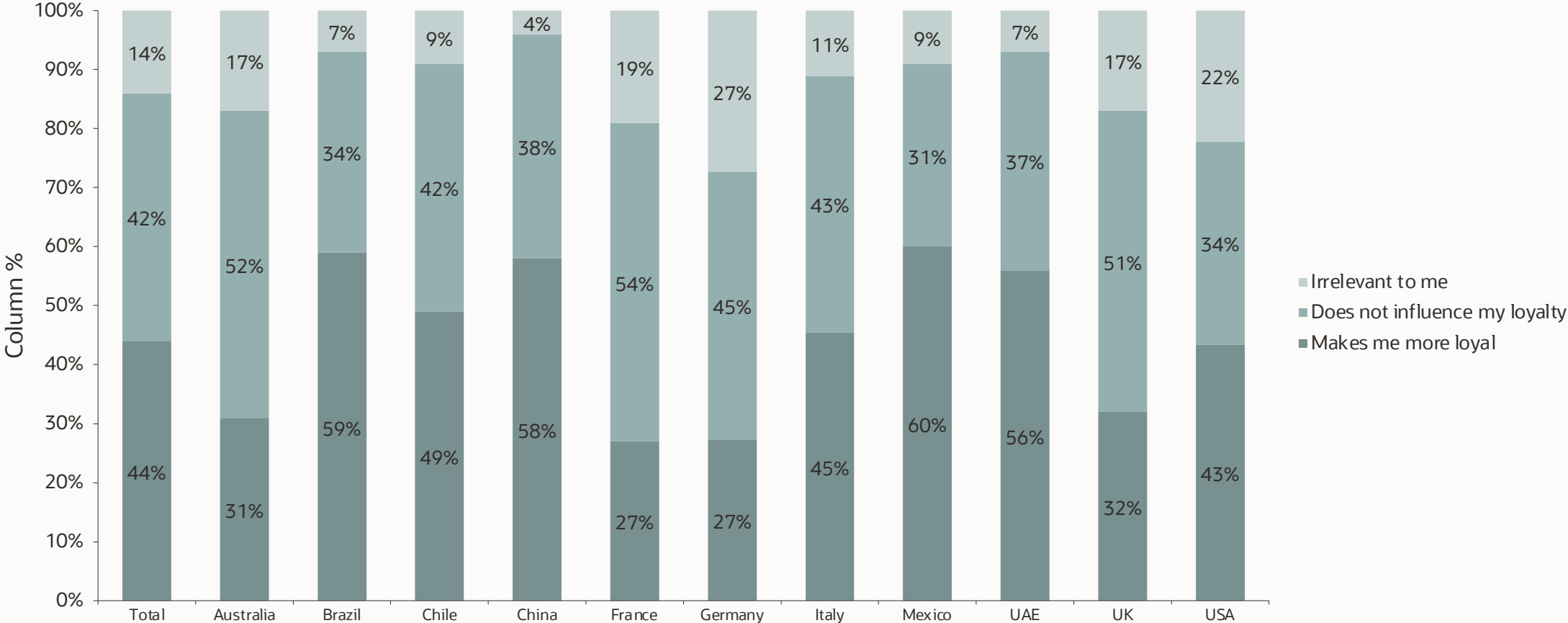
Sample Size = 5,728

Consumer sentiment on click and collect's impact on spending habits

Column %

	Total	Australia	Brazil	Chile	China	France	Germany	Italy	Mexico	UAE	UK	USA
It would not impact my spending	41%	55%	36%	39%	19%	56%	50%	49%	33%	26%	48%	46%
I'd spend a bit more	35%	26%	35%	41%	45%	29%	32%	37%	46%	41%	28%	24%
I'd spend a lot more	24%	19%	29%	20%	36%	15%	18%	14%	22%	33%	24%	30%

Legend:
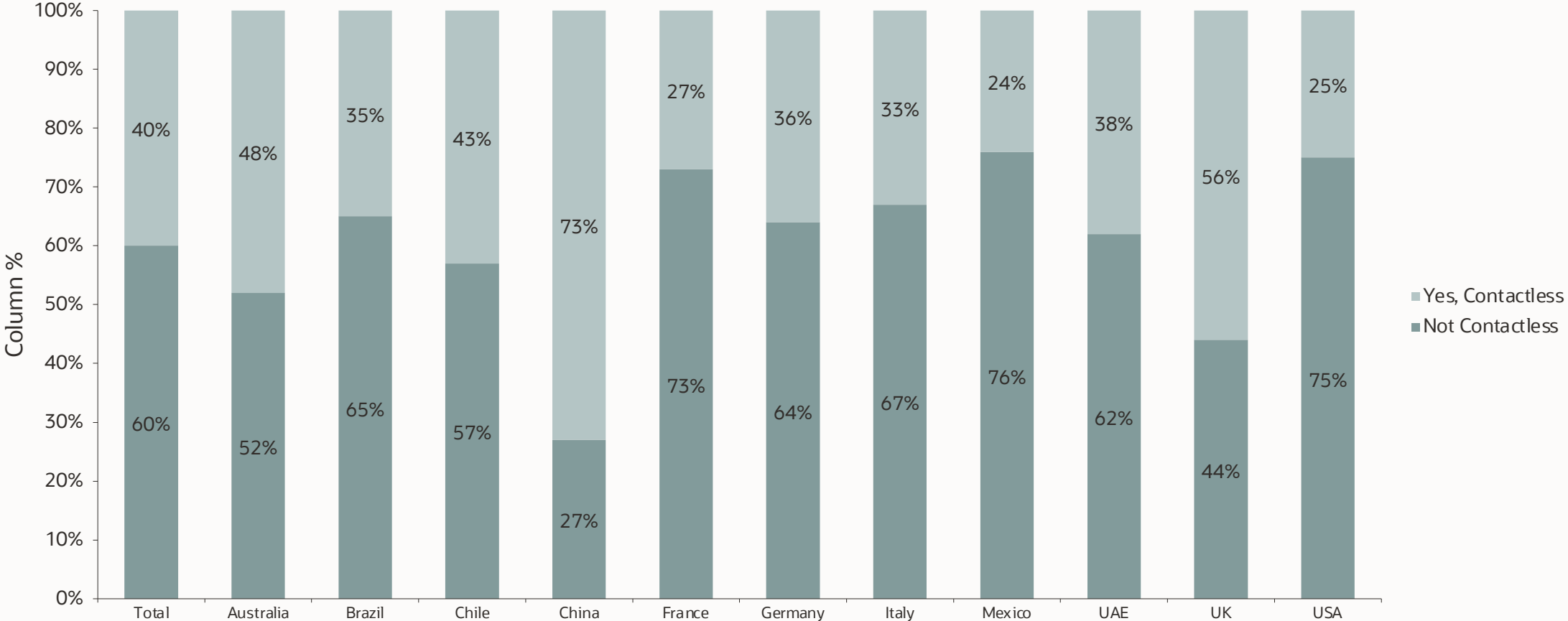- It would not impact my spending
- I'd spend a bit more
- I'd spend a lot more
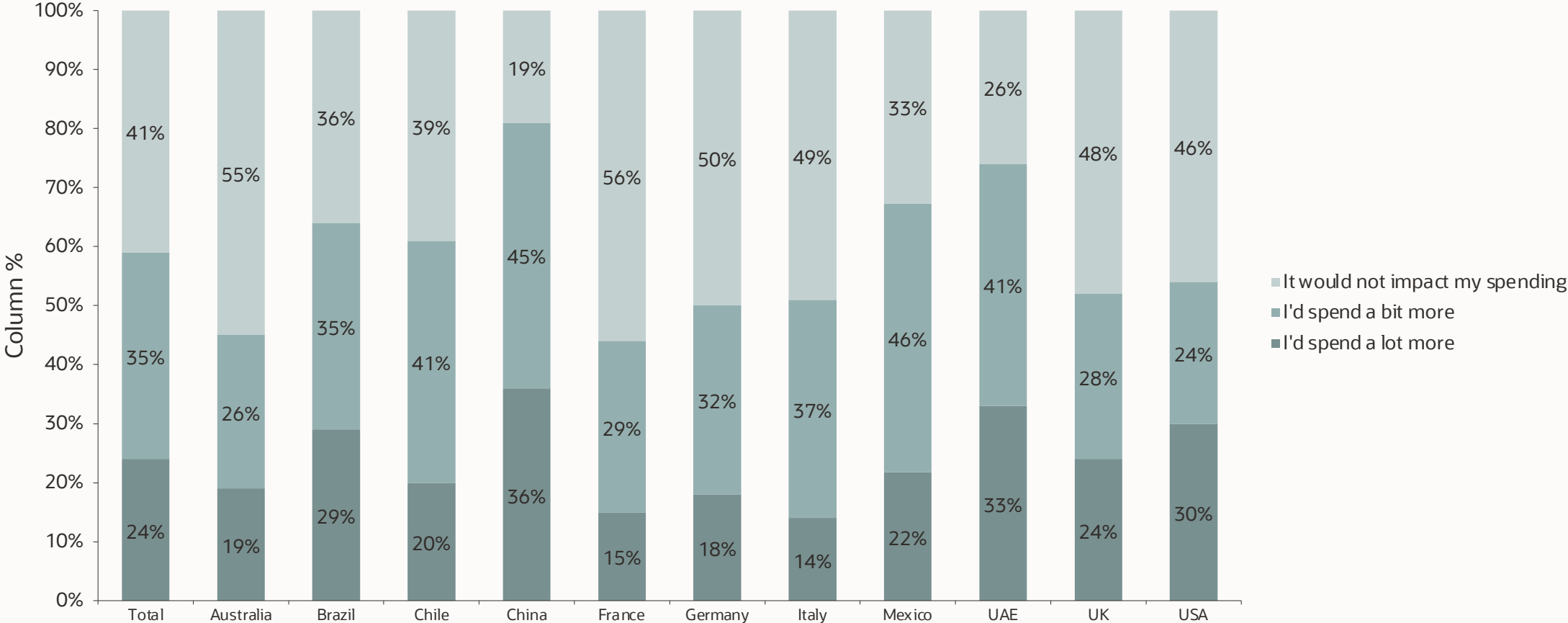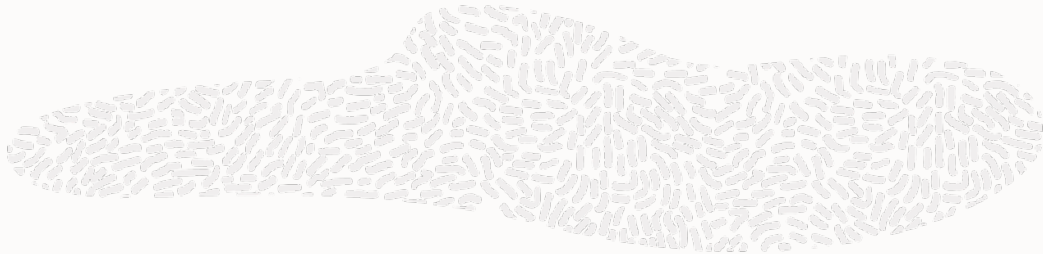
Sample Size = 5,728

Payment preferences

Preferred way to pay: contactless or no?

Legend:
- Yes, Contactless
- Not Contactless

	Yes, Contactless	Not Contactless
Total	40%	60%
Australia	48%	52%
Brazil	35%	65%
Chile	43%	57%
China	73%	27%
France	27%	73%
Germany	36%	64%
Italy	33%	67%
Mexico	24%	76%
UAE	38%	62%
UK	56%	44%
USA	25%	75%

Column %

Sample Size = 5,728

Preferred way to pay: credit card or other?

Chart — "Preferred way to pay: credit card or other?"

Column %

Country	Credit card	Other
Total	47%	53%
Australia	46%	54%
Brazil	61%	39%
Chile	48%	52%
China	16%	84%
France	65%	35%
Germany	32%	68%
Italy	48%	52%
Mexico	52%	48%
UAE	59%	41%
UK	35%	65%
USA	60%	40%

Legend: Credit card, Other

Sample Size = 5,728

Preferred way to pay: cash or other?

Column %

	Total	Australia	Brazil	Chile	China	France	Germany	Italy	Mexico	UAE	UK	USA
Cash	44%	34%	43%	43%	24%	32%	62%	48%	60%	56%	37%	47%
Other	56%	66%	57%	57%	76%	68%	38%	52%	40%	44%	63%	53%
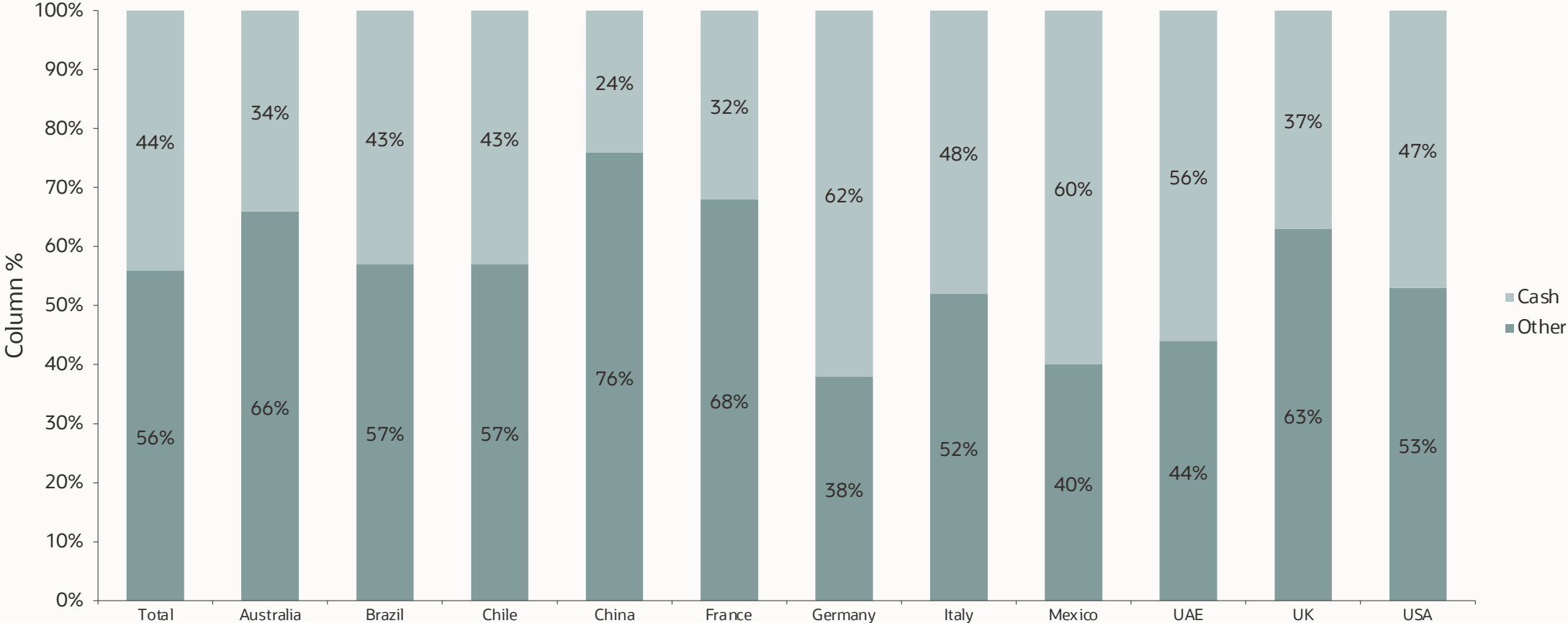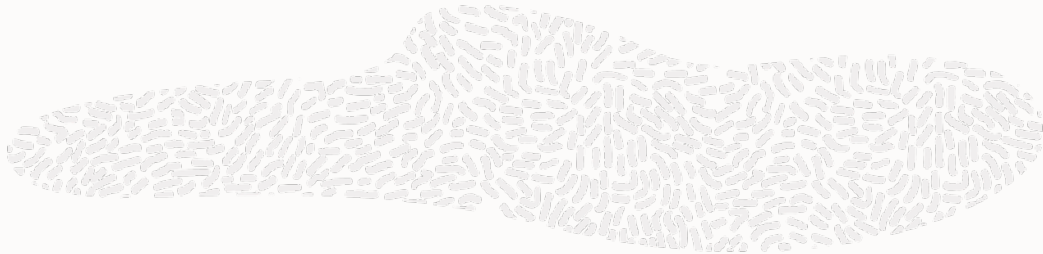
Sample Size = 5,728

Preferred way to pay: Crypto currency or other?

Chart showing "Column %" by country. Legend: Crypto currency (light), Other (dark).

Country	Crypto currency	Other
Total	4%	96%
Australia	4%	96%
Brazil	3%	97%
Chile	3%	97%
China	4%	96%
France	3%	97%
Germany	7%	93%
Italy	4%	96%
Mexico	2%	98%
UAE	6%	94%
UK	5%	95%
USA	7%	93%
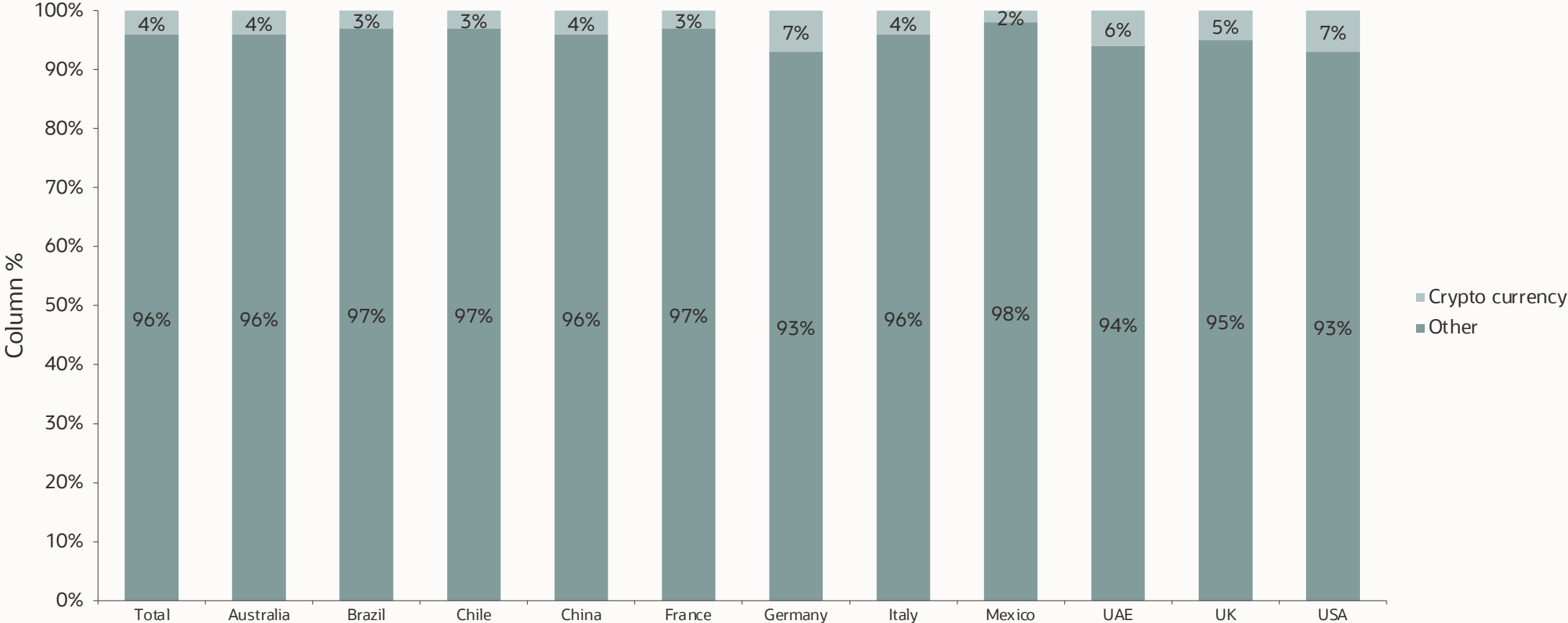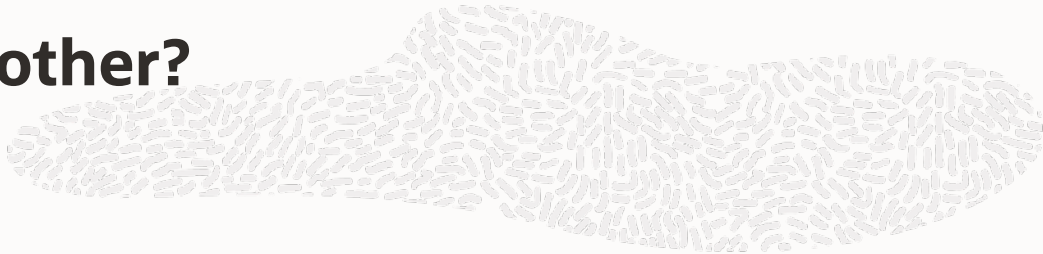
Sample Size = 5,728

Personal offers and data management

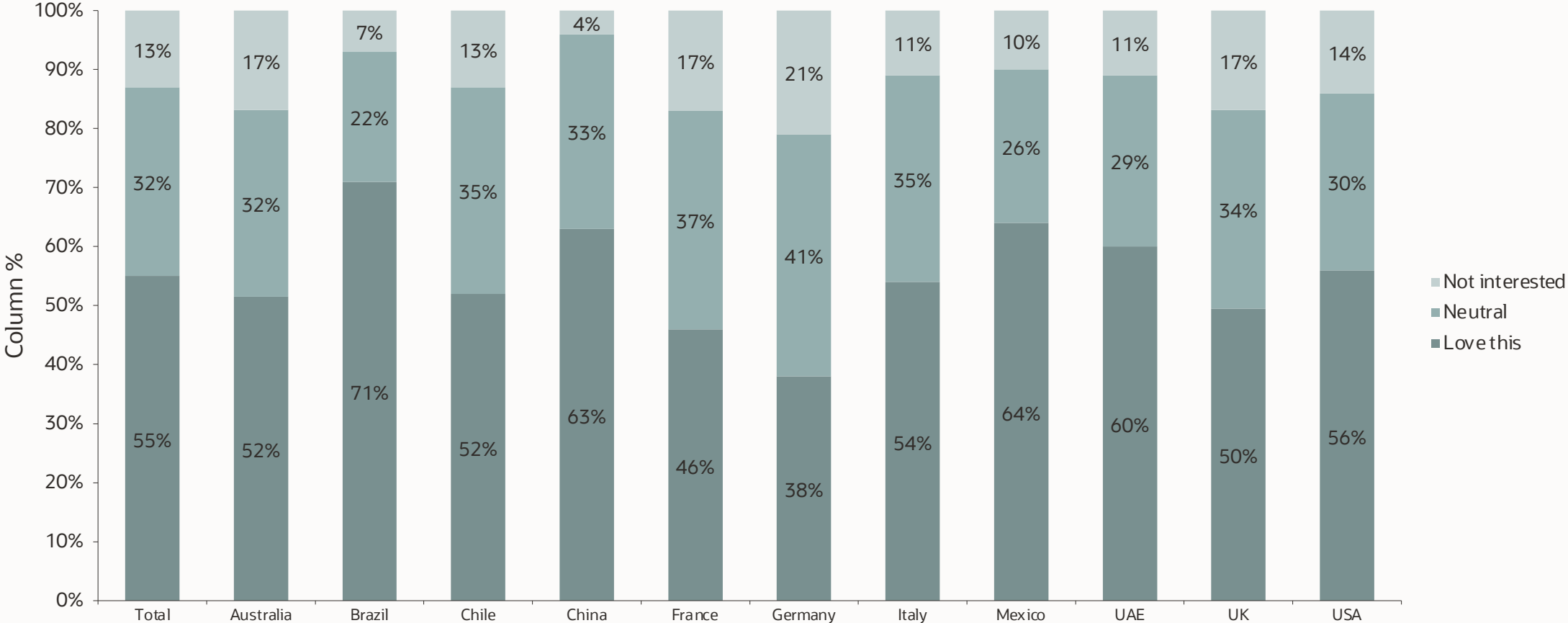# Consumer sentiment on receiving special offers and promotion notifications based on their current location

Column %

	Total	Australia	Brazil	Chile	China	France	Germany	Italy	Mexico	UAE	UK	USA
Not interested	13%	17%	7%	13%	4%	17%	21%	11%	10%	11%	17%	14%
Neutral	32%	32%	22%	35%	33%	37%	41%	35%	26%	29%	34%	30%
Love this	55%	52%	71%	52%	63%	46%	38%	54%	64%	60%	50%	56%

Sample Size = 5,728

Consumer sentiment on having the ability to manage dietary preferences and share them with restaurants they visit or order from

Stacked bar chart. Y-axis: Column % (0% to 100%). Legend: Not interested, Neutral, Love this.

Country	Love this	Neutral	Not interested
Total	46%	37%	17%
Australia	41%	37%	23%
Brazil	59%	34%	8%
Chile	44%	44%	12%
China	53%	40%	8%
France	42%	38%	20%
Germany	36%	40%	24%
Italy	43%	39%	17%
Mexico	52%	37%	11%
UAE	53%	34%	13%
UK	39%	37%	23%
USA	43%	32%	25%
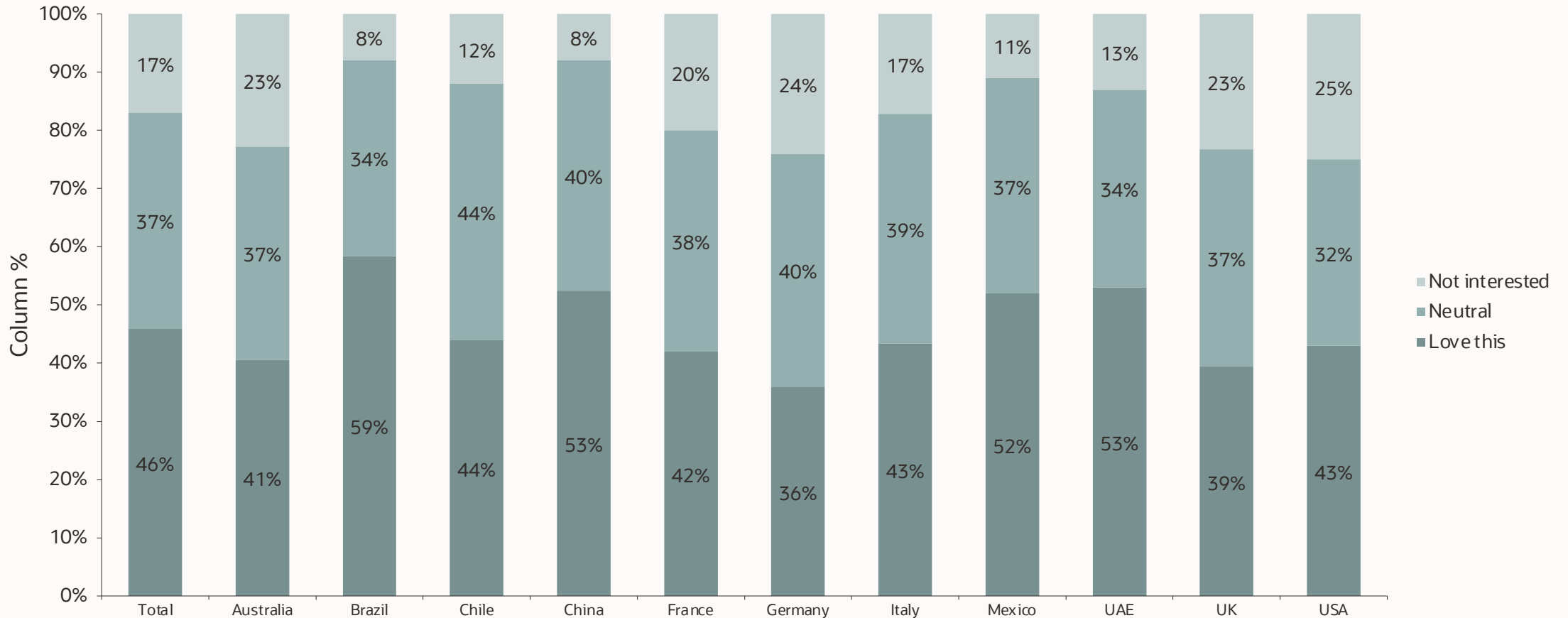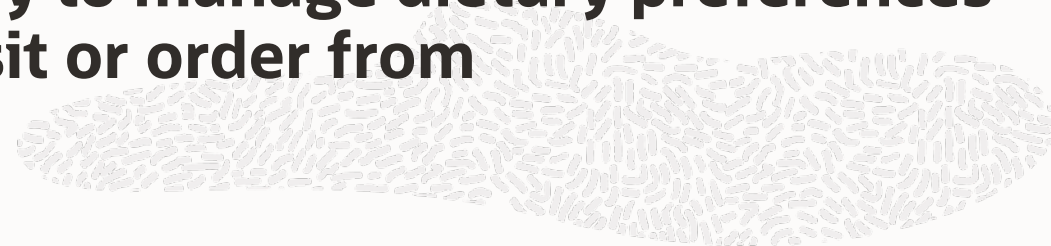
Sample Size = 5,728

Consumer sentiment on receiving preference suggestions based on their purchase history

Column %

	Total	Australia	Brazil	Chile	China	France	Germany	Italy	Mexico	UAE	UK	USA
Not interested	17%	26%	8%	12%	6%	23%	24%	16%	10%	13%	23%	23%
Neutral	38%	38%	27%	39%	42%	40%	44%	43%	28%	37%	43%	41%
Love this	45%	37%	65%	49%	52%	37%	33%	41%	62%	50%	34%	37%
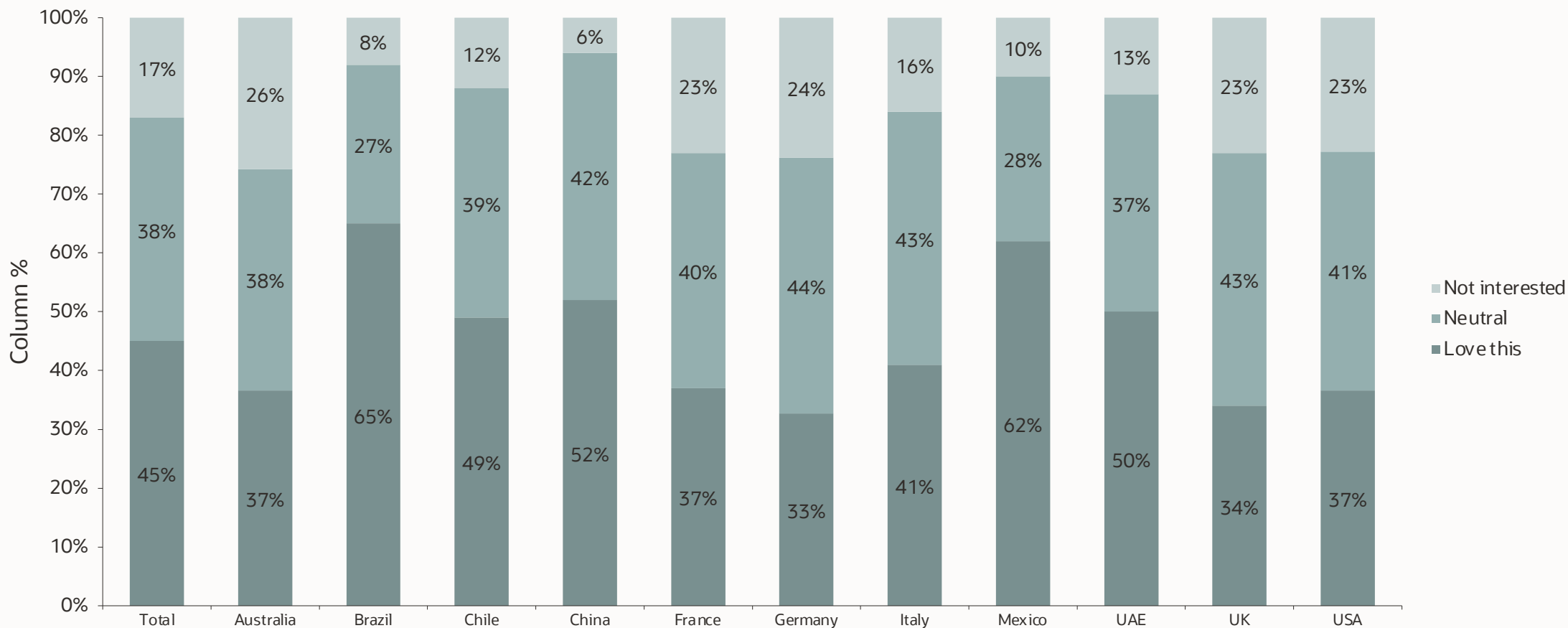
Sample Size = 5,728

Consumer sentiment on understanding and controlling who has access to the data they share with restaurants and delivery companies

Column %

	Total	Australia	Brazil	Chile	China	France	Germany	Italy	Mexico	UAE	UK	USA
Not interested	14%	16%	9%	12%	17%	20%	16%	14%	11%	14%	14%	13%
Neutral	38%	35%	28%	43%	43%	43%	43%	42%	33%	35%	40%	30%
Love this	48%	50%	63%	45%	41%	38%	42%	44%	55%	51%	46%	56%
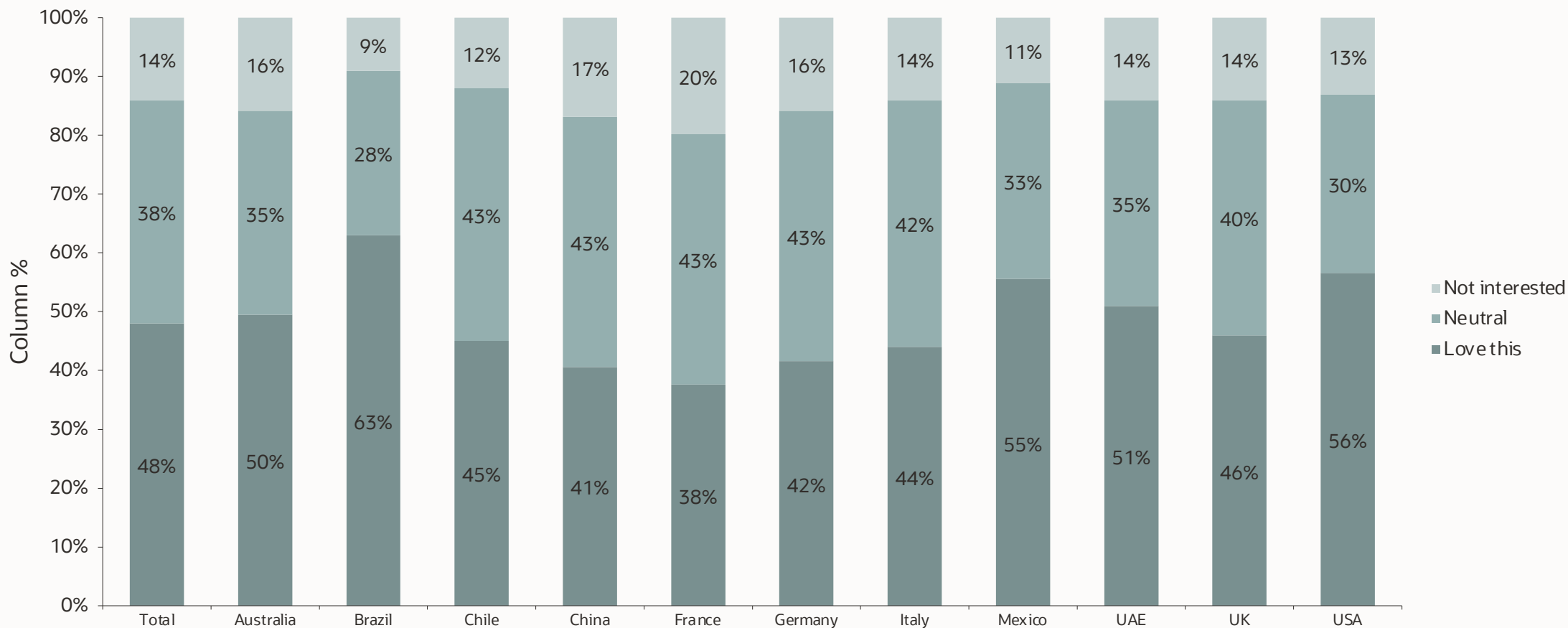
Sample Size = 5,728

Consumer sentiment on receiving offers from partner brands of the places they order from (e.g. other restaurant brands or stores)

Column %

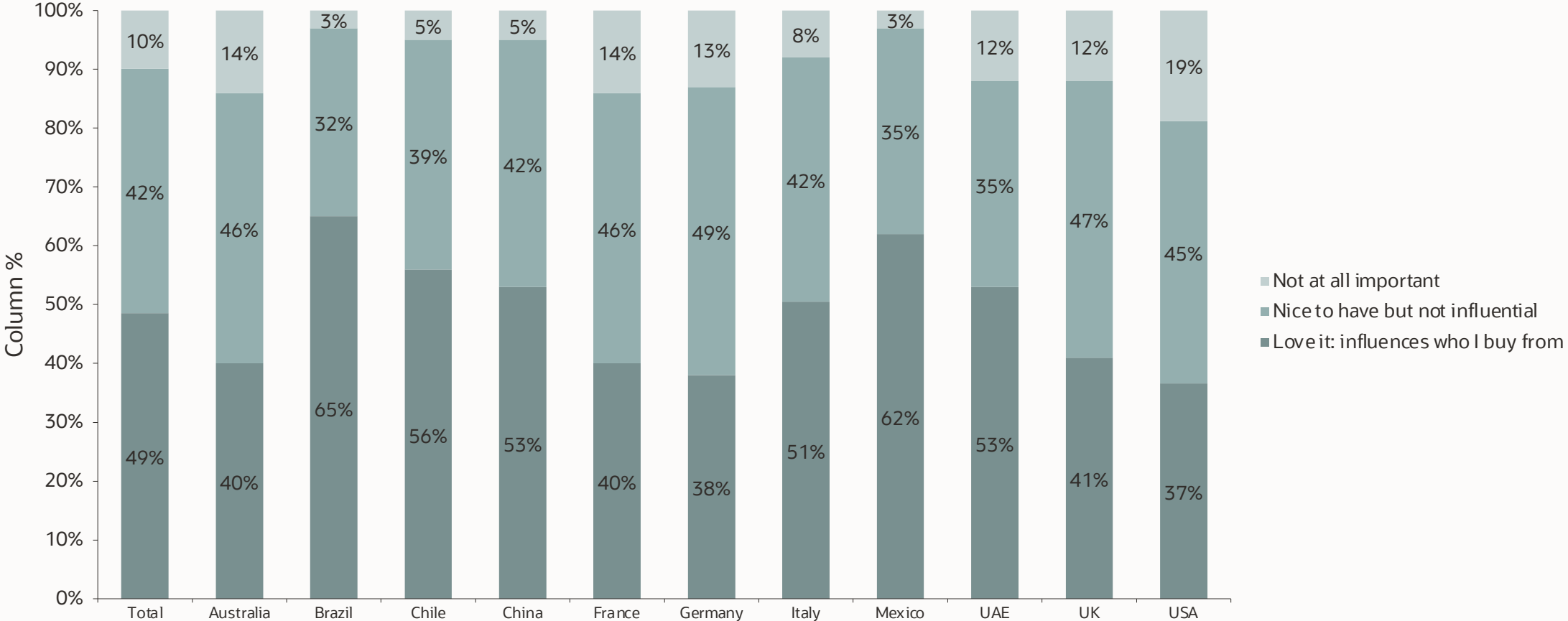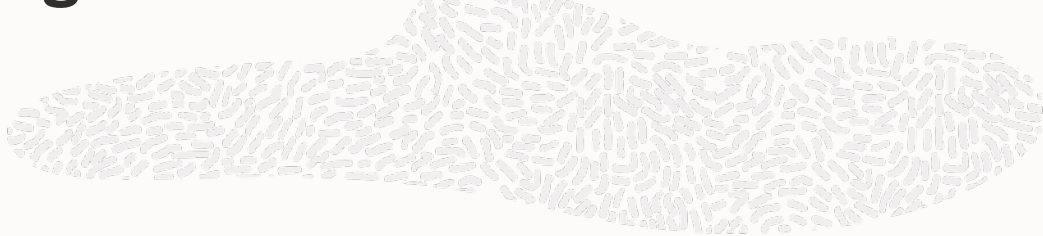|	Not interested	Neutral	Love this
Total	16%	36%	48%
Australia	25%	37%	37%
Brazil	8%	27%	64%
Chile	10%	35%	55%
China	4%	34%	61%
France	23%	38%	39%
Germany	24%	47%	29%
Italy	16%	38%	46%
Mexico	7%	31%	63%
UAE	12%	31%	57%
UK	24%	37%	39%
USA	20%	38%	43%
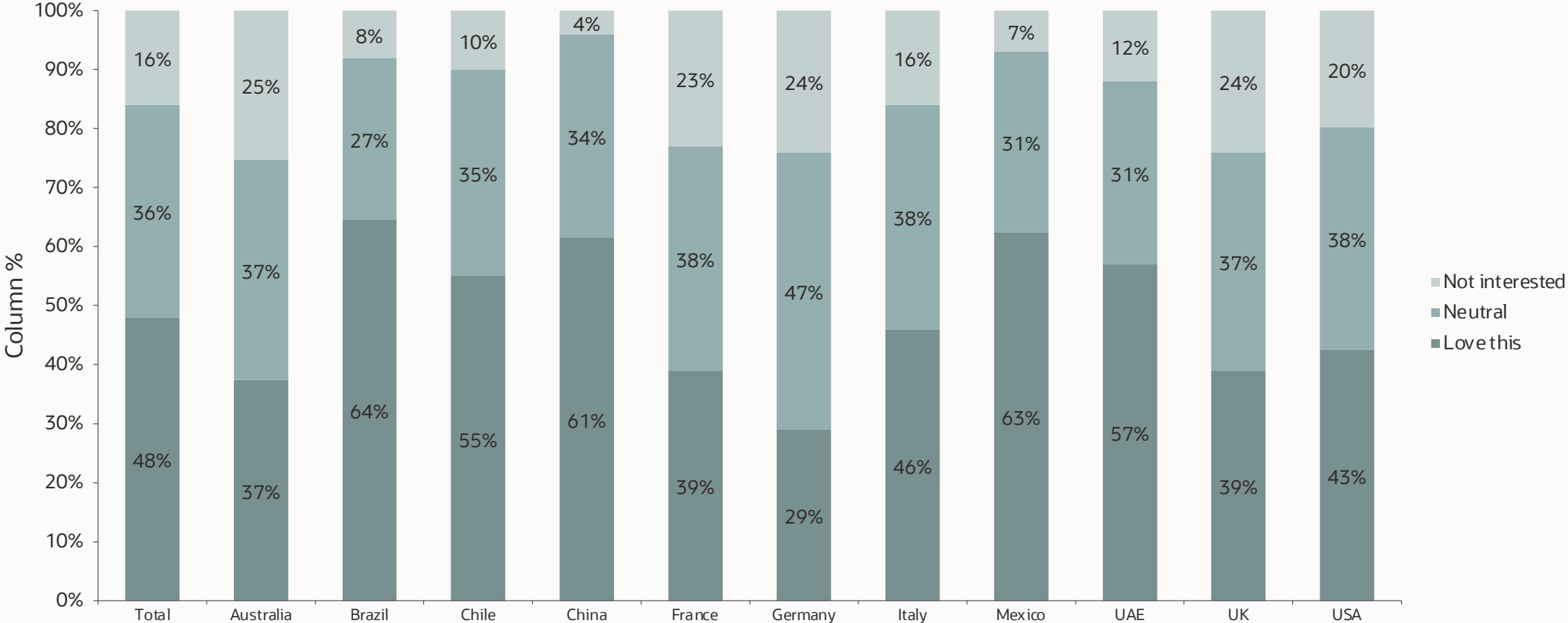
Sample Size = 5,728

Environmental, sustainability and corporate governance (ESG) influence on loyalty

Biodegradable or recyclable food packaging influence on consumer buying decisions

Column %

Legend:
- Not at all important
- Nice to have but not influential
- Love it: influences who I buy from

	Total	Australia	Brazil	Chile	China	France	Germany	Italy	Mexico	UAE	UK	USA
Not at all important	10%	14%	3%	5%	5%	14%	13%	8%	3%	12%	12%	19%
Nice to have but not influential	42%	46%	32%	39%	42%	46%	49%	42%	35%	35%	47%	45%
Love it: influences who I buy from	49%	40%	65%	56%	53%	40%	38%	51%	62%	53%	41%	37%

Sample Size = 5,728

Low or zero emission takeout delivery services influence on consumer buying decisions

Sample Size = 5,728

Legend:
- Not at all important
- Nice to have but not influential
- Love it: influences who I buy from

Country	Not at all important	Nice to have but not influential	Love it: influences who I buy from
Total	12%	46%	42%
Australia	20%	49%	30%
Brazil	7%	38%	55%
Chile	5%	44%	50%
China	7%	50%	44%
France	16%	48%	36%
Germany	16%	54%	30%
Italy	8%	43%	49%
Mexico	5%	40%	55%
UAE	12%	43%	45%
UK	16%	50%	34%
USA	24%	45%	31%
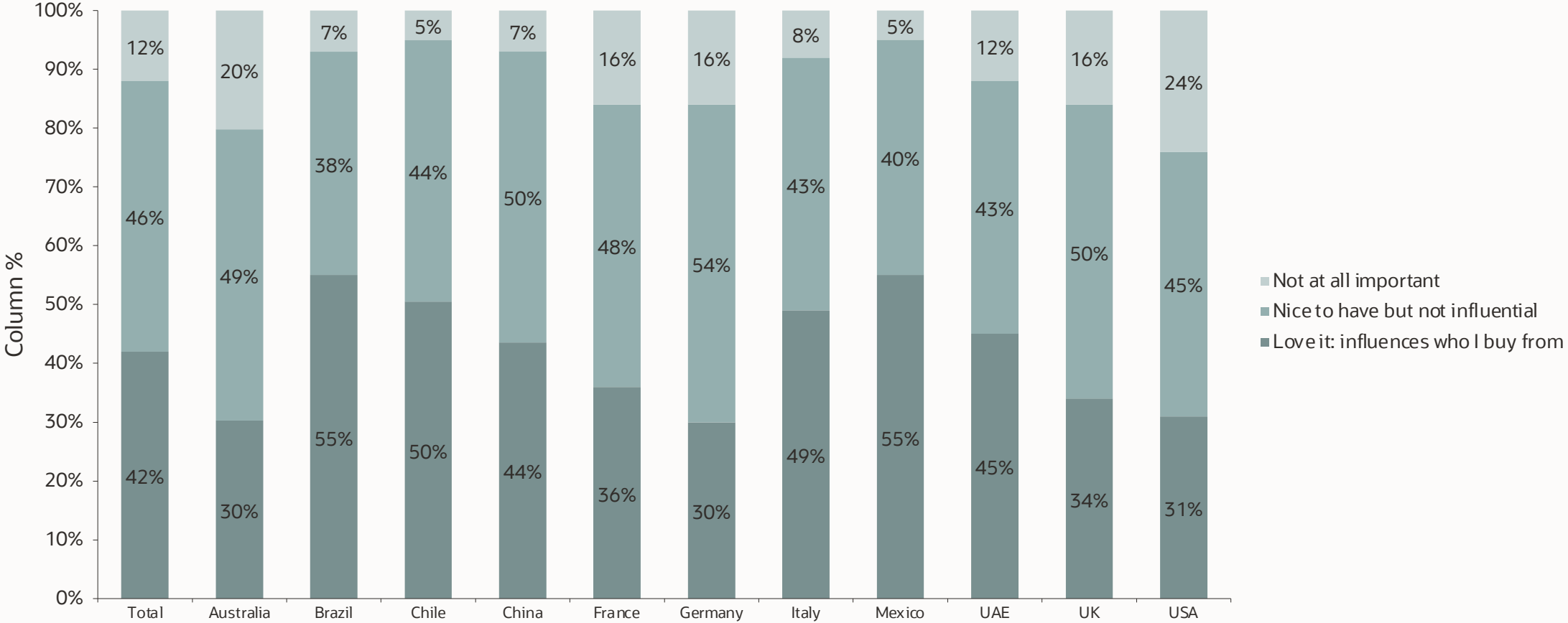
Efforts to lower food waste influence on consumer buying decisions

Legend:
- Not at all important
- Nice to have but not influential
- Love it: influences who I buy from

Country	Not at all important	Nice to have but not influential	Love it: influences who I buy from
Total	7%	39%	54%
Australia	11%	43%	46%
Brazil	3%	28%	68%
Chile	4%	36%	60%
China	3%	40%	57%
France	10%	40%	50%
Germany	10%	45%	45%
Italy	6%	38%	56%
Mexico	3%	34%	63%
UAE	9%	33%	58%
UK	9%	47%	44%
USA	13%	39%	47%

Y-axis: Column %
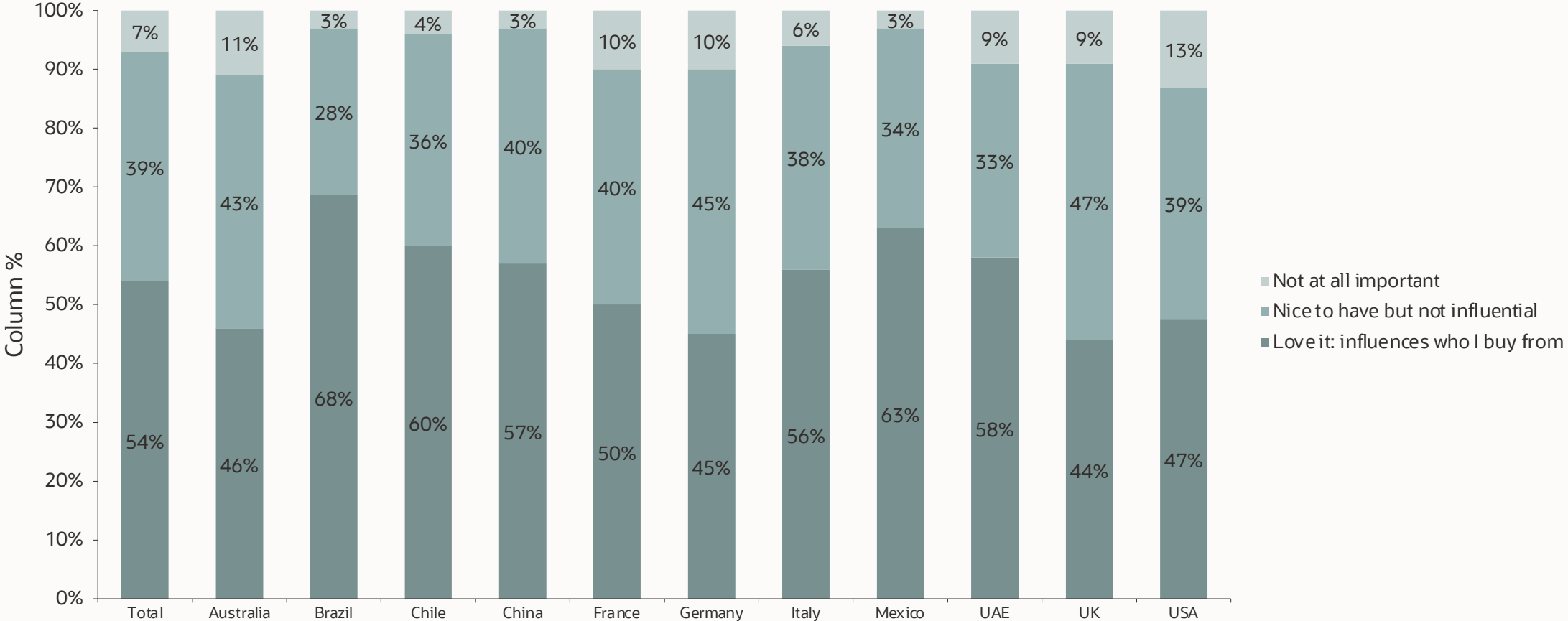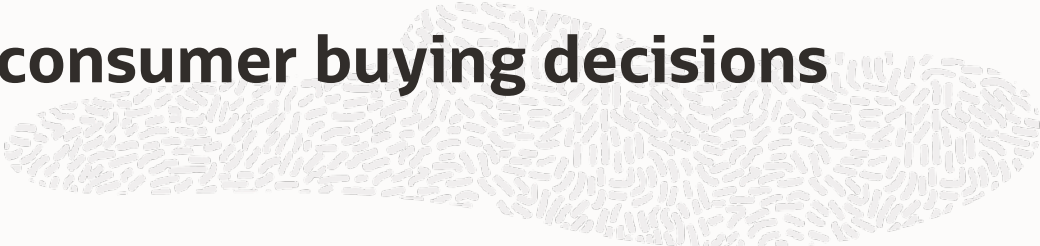
Sample Size = 5,728

Clear labelling of food source and ingredients influence on consumer buying decisions

Column %

	Total	Australia	Brazil	Chile	China	France	Germany	Italy	Mexico	UAE	UK	USA
Not at all important	9%	14%	5%	5%	4%	12%	11%	5%	5%	11%	13%	16%
Nice to have but not influential	38%	41%	31%	37%	36%	38%	46%	35%	36%	34%	48%	39%
Love it: influences who I buy from	52%	45%	64%	58%	60%	50%	43%	59%	59%	56%	39%	45%

Legend:
- Not at all important
- Nice to have but not influential
- Love it: influences who I buy from
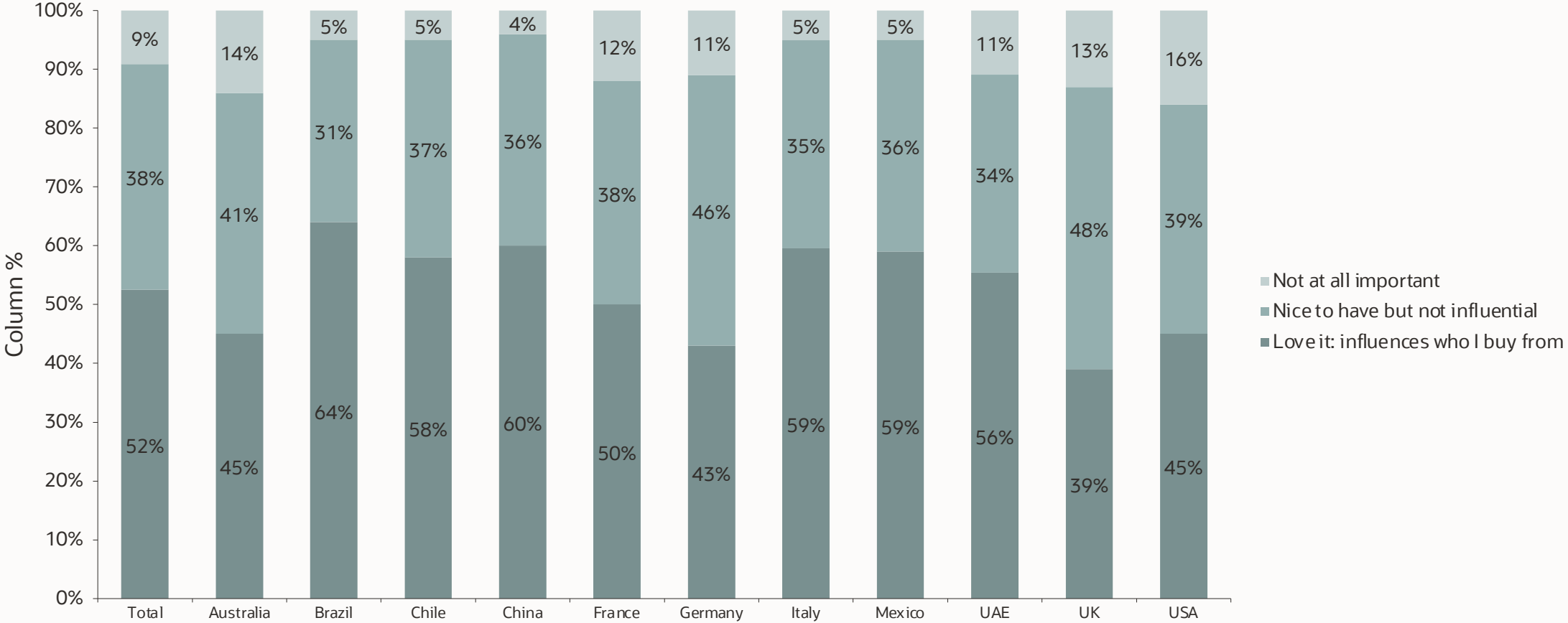
Sample Size = 5,728

Consumer sentiment on the importance of restaurants always offering a healthy option on their menu

Column %

	Not important	Neutral	Important
Total	5%	25%	70%
Australia	9%	33%	58%
Brazil	1%, 9%		90%
Chile	3%	22%	75%
China	1%	11%	88%
France	5%	29%	66%
Germany	10%	37%	53%
Italy	4%	25%	71%
Mexico	2%	19%	80%
UAE	3%	20%	77%
UK	10%	33%	57%
USA	10%	32%	58%
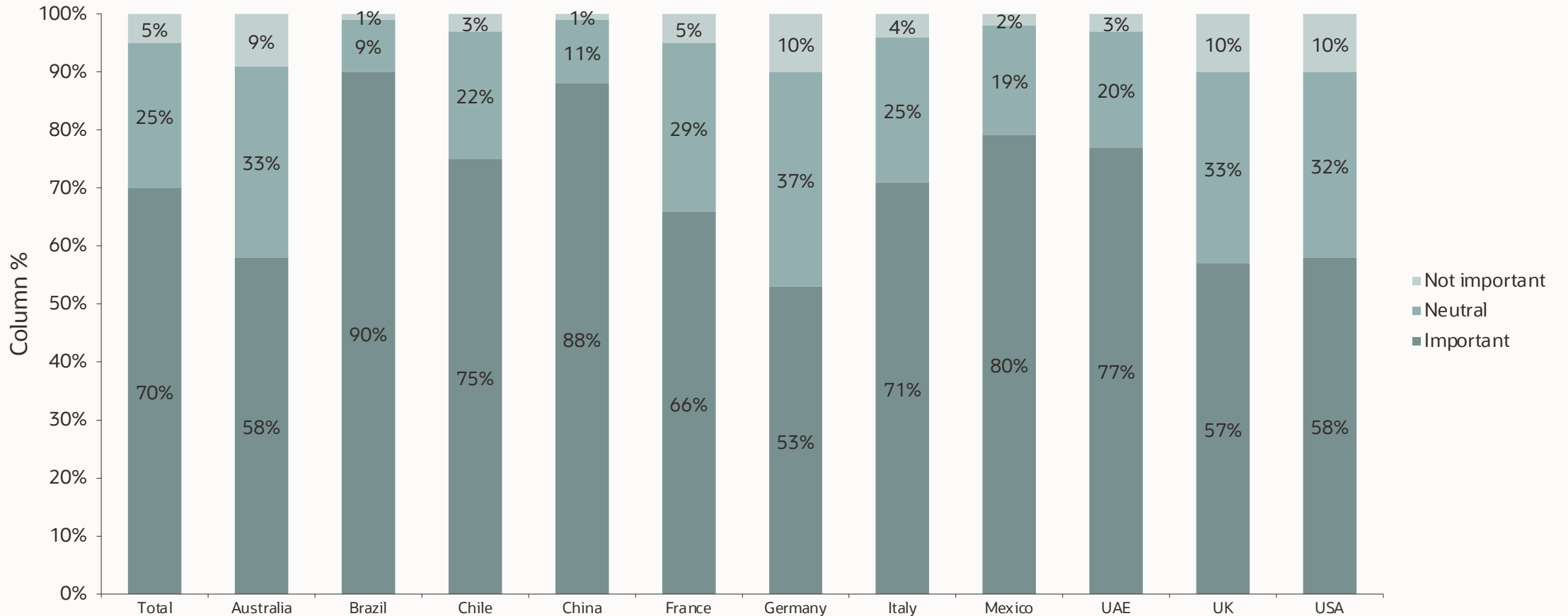
Sample Size = 5,728

2022: The Year of Ambition

Restaurant technology and digitization of the customer experience is here to stay. A well-orchestrated approach to handling multiple selling channels, personal data control, more informed personal offers and transparency on management of environmental impact and healthy options are all on the table for 2022.

Oracle helps ambitious restaurateurs transact in new ways and place their customers at the center of every business decision to deliver great guest experiences.

If you're looking to invest in your technology strategy, we're here to advise you on how to deliver quick wins, and long-term growth.

Contact us to learn how Oracle can help you stay agile and ahead of your customers' expectations:

Chat live

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