ORACLE

Restaurant Scene 2022:
4 Global Trends | 30 UK Stats

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

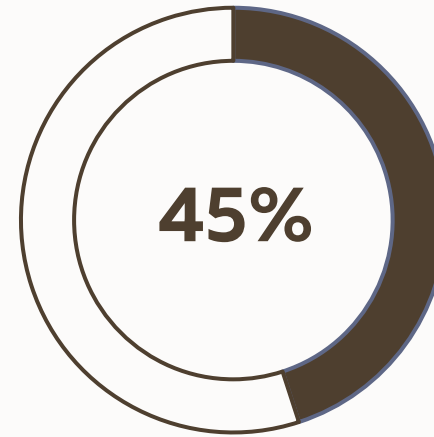|	Total	Australia	Brazil	Chile	China	France	Germany	Italy	Mexico	UAE	UK	USA
	5,728	520	519	526	512	501	536	525	523	526	528	512
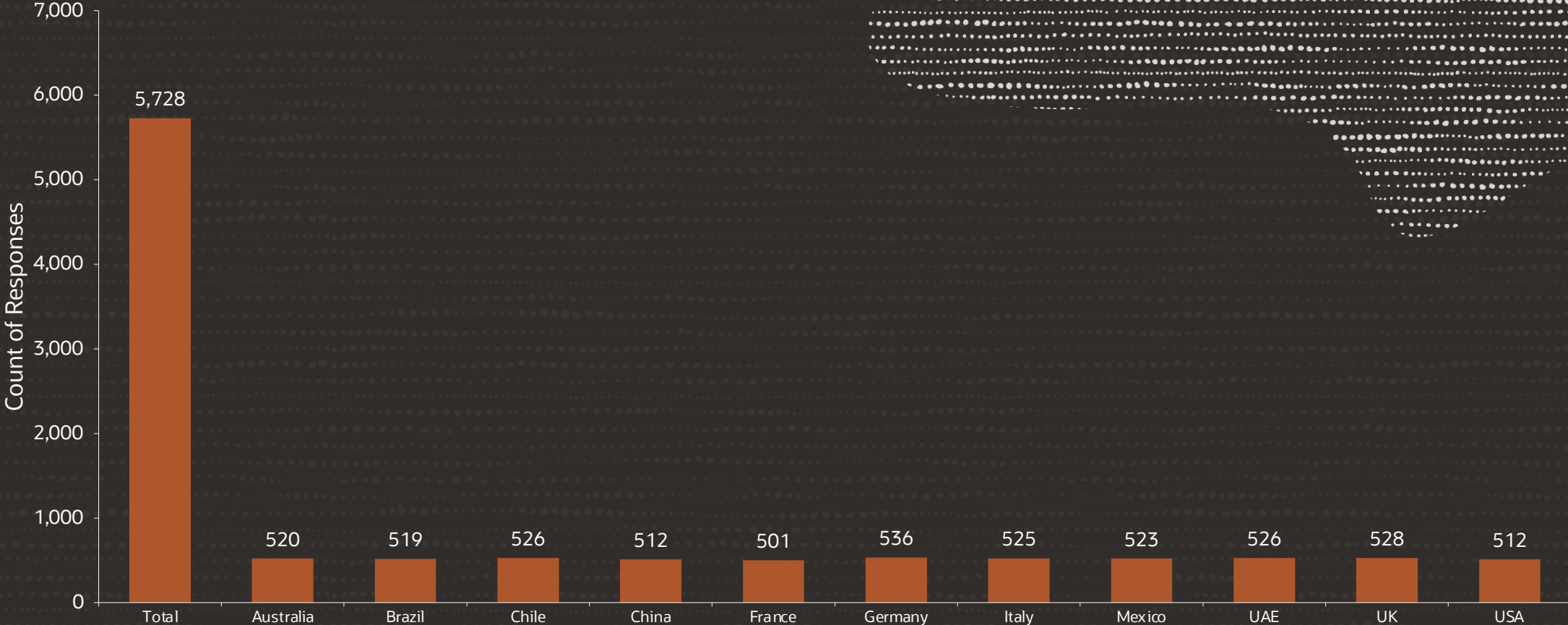
Sample Size = 5,728

Global Trend 1: Incremental Off-premises Demand Impacting CSAT

Time before customers are annoyed waiting to order

	2 mins	5 mins
Drive-thru		
Counter		
Table Service		

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

■ 2 mins ■ 5 mins
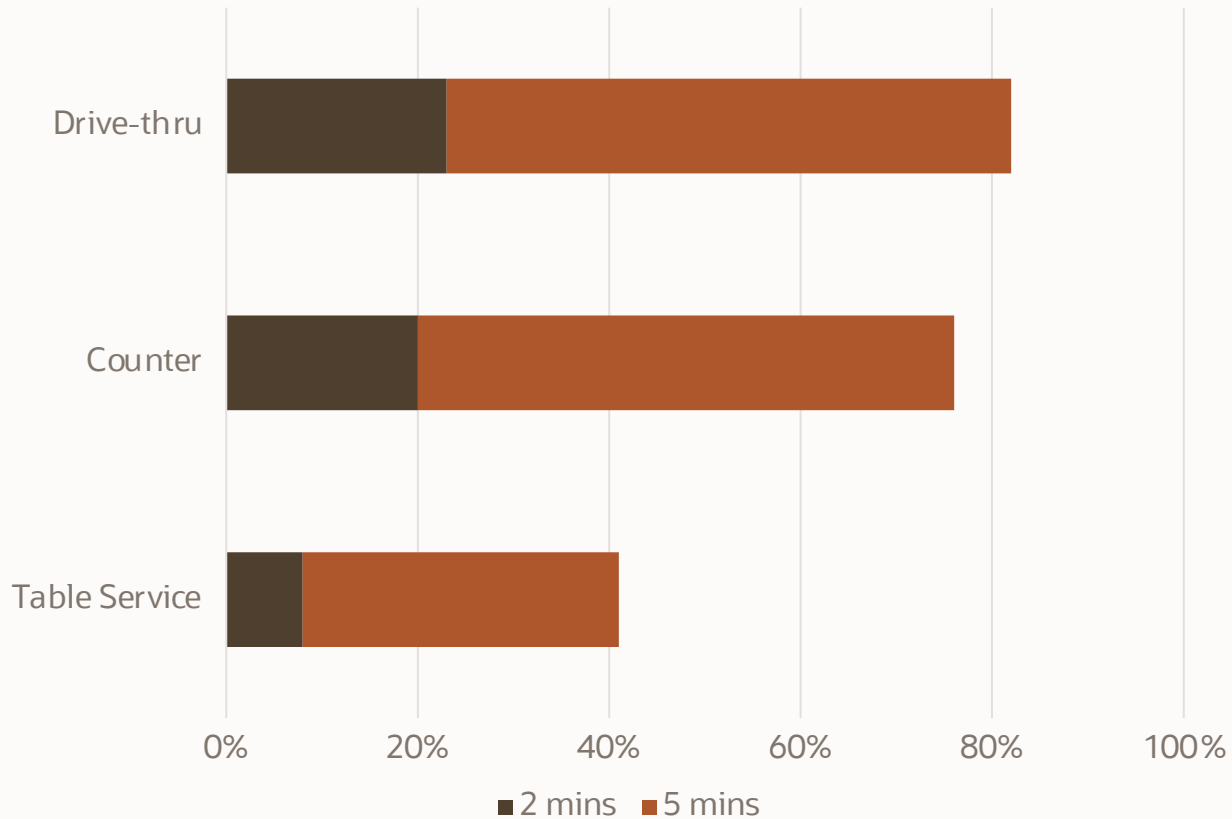
45% of consumers feel **wait time** is **longer** when **ordering in-person**
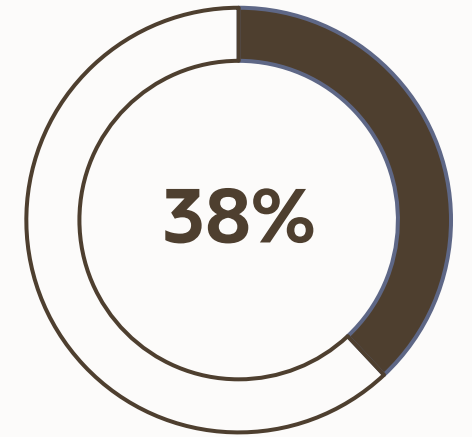
38% of consumers dining-in feel **deprioritized compared to online orders**

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	~45%
Australia	~45%
Germany	~50%
Italy	~51%
United Kingdom	~53%
United States	~54%
Chile	~61%
Brazil	~64%
Mexico	~68%
UAE	~74%
China	~81%

(x-axis: 0%, 20%, 40%, 60%, 80%, 100%)

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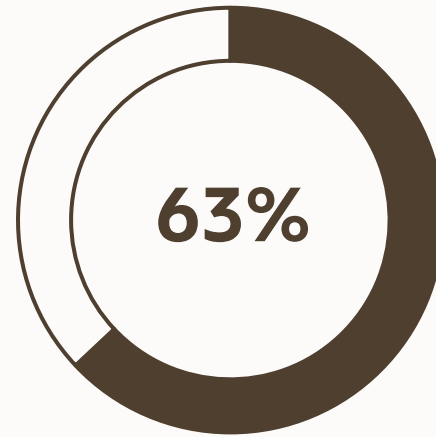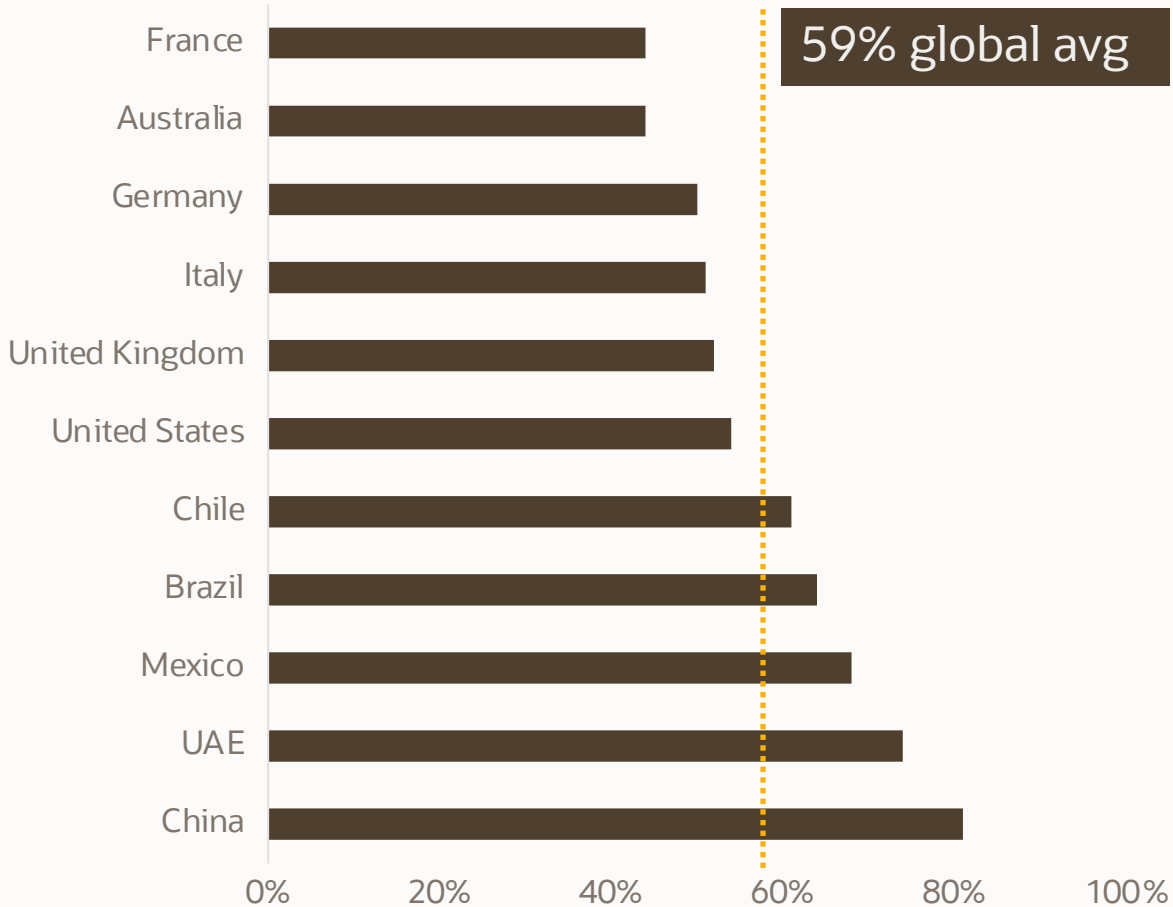
of consumers said, "I **love it & it positively impacts where** I eat"

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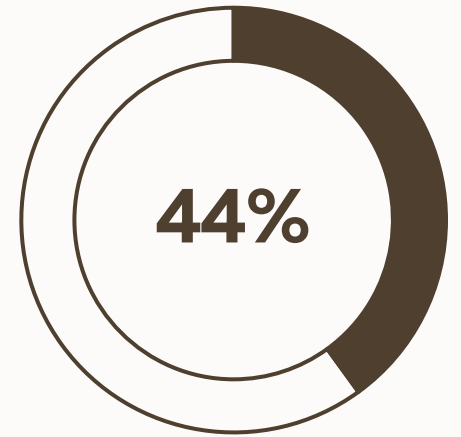
of consumers said, "it makes me **more loyal**"

Global Trend 3: Consumers Want Data-informed Personal Offers

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

Legend:
- Love the Option
- Will Share Data

Categories (top to bottom):
- Purchase history
- Dietary preferences
- Related brands

X-axis: 0%, 10%, 20%, 30%, 40%, 50%, 60%
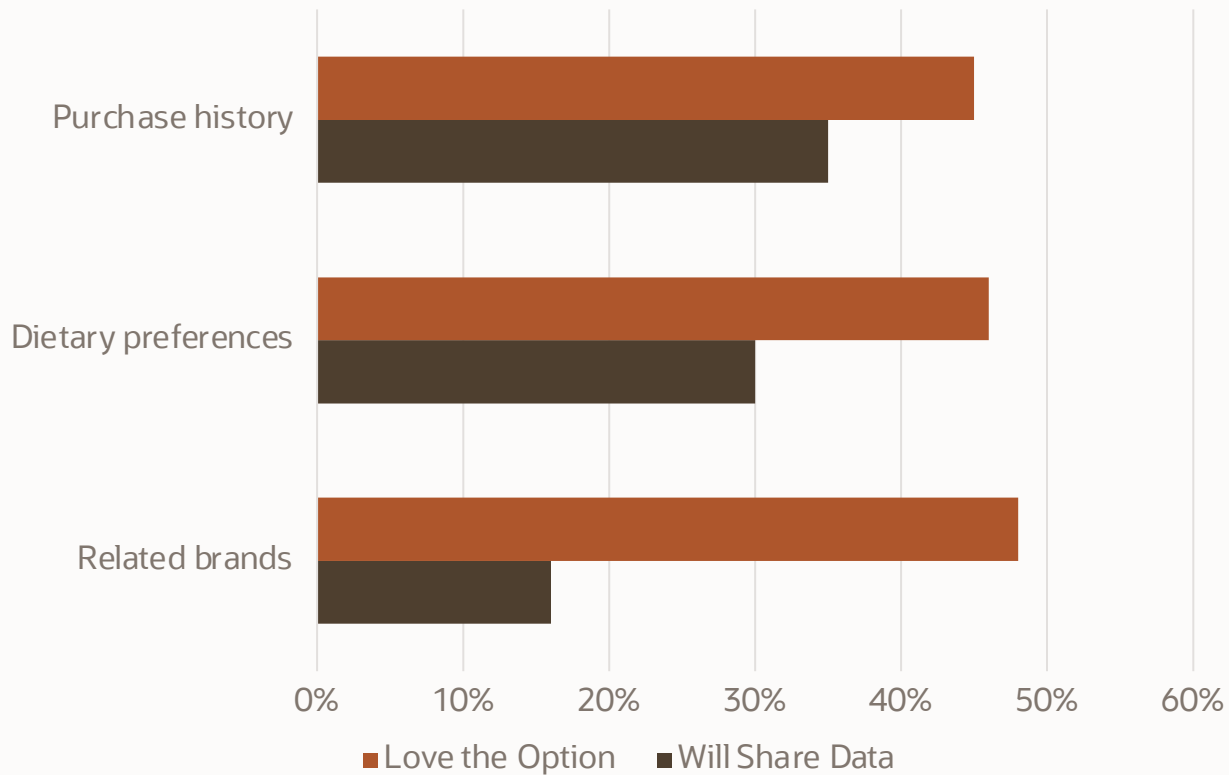
% who want visibility and control of data sharing

48% global avg

Countries (top to bottom):
- France
- China
- Germany
- Italy
- Chile
- United Kingdom
- Australia
- UAE
- Mexico
- United States
- Brazil

X-axis: 0%, 10%, 20%, 30%, 40%, 50%, 60%, 70%
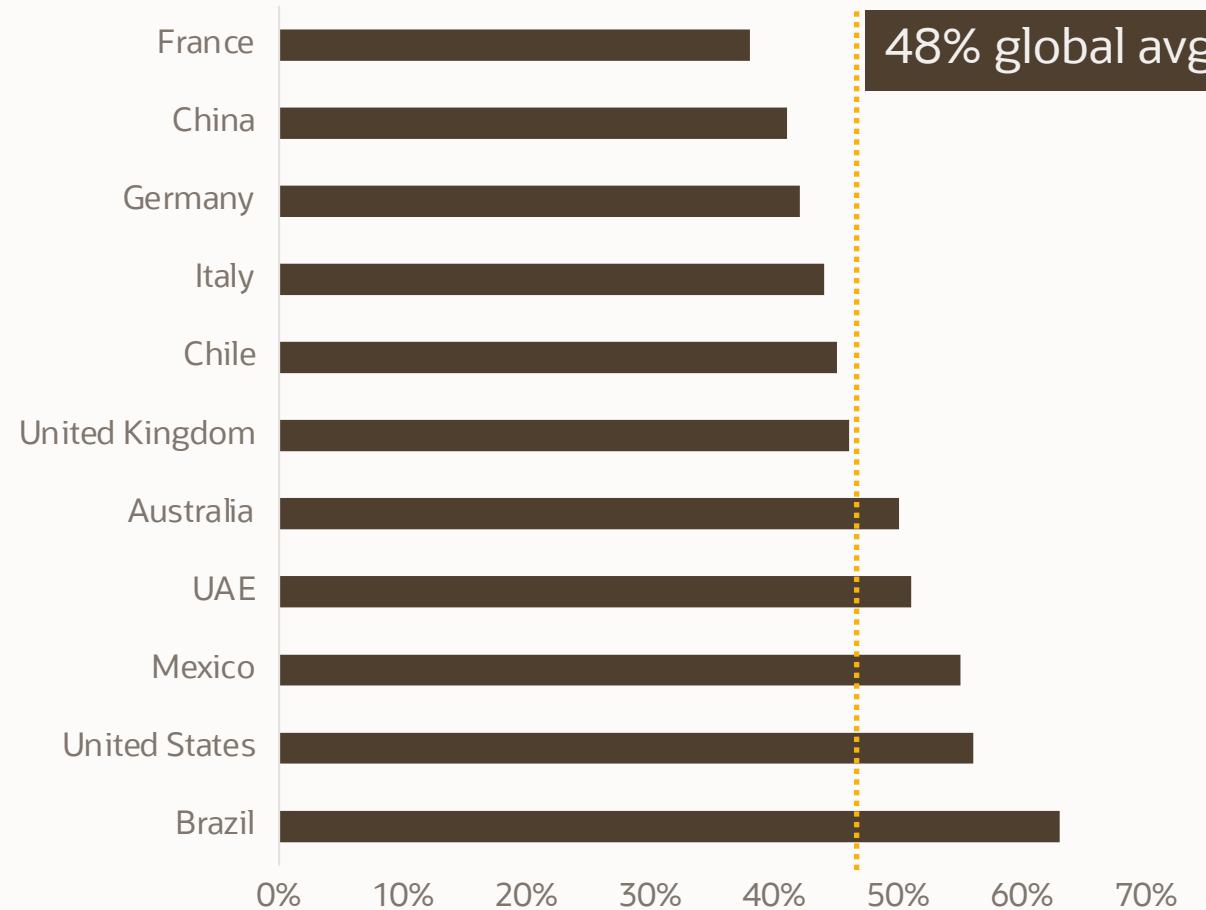
Global Trend 4: Environment, sustainability initiatives have significant influence

% consumers influenced by sustainability initiatives

Category	
Offer low / zero emission delivery	
Biodegradable / recyclable packaging	
Bring your own cups / refill	
Social commitment transparency	
Clear labeling of ingredient source	
Efforts to lower food waste	

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%
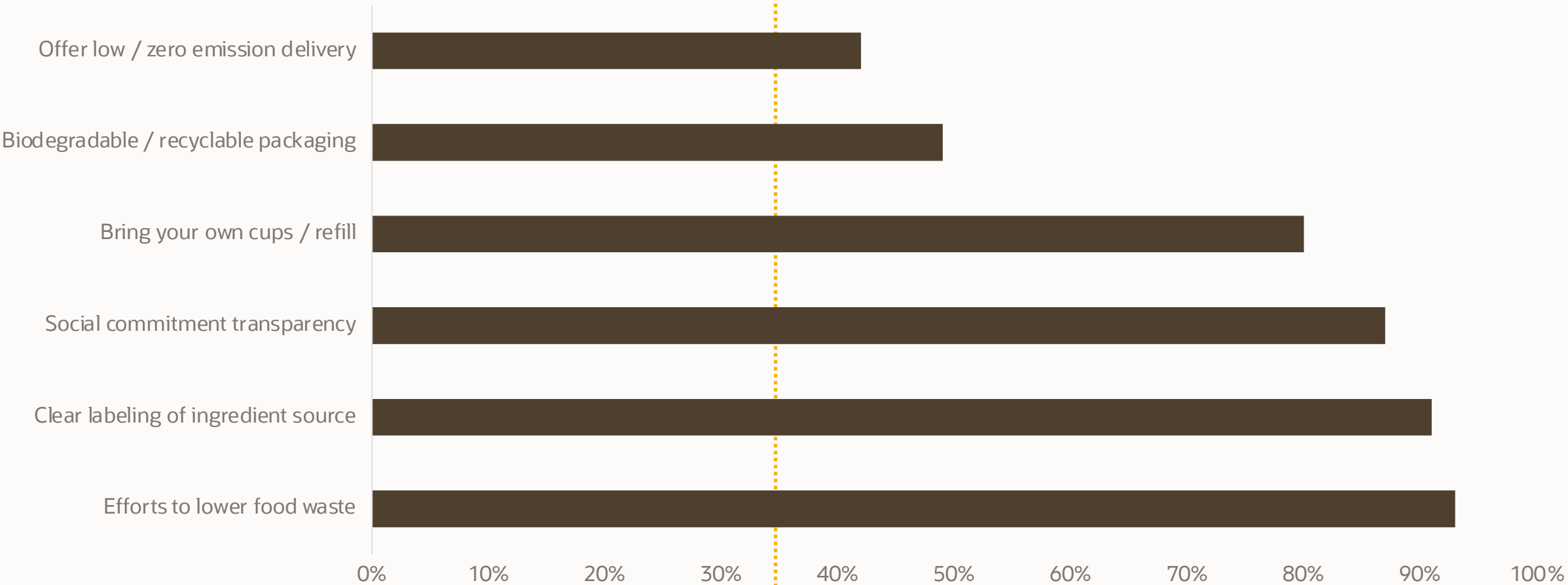
33% rated important in April 2021

30 Restaurant Consumer Trend Statistics for the United Kingdom

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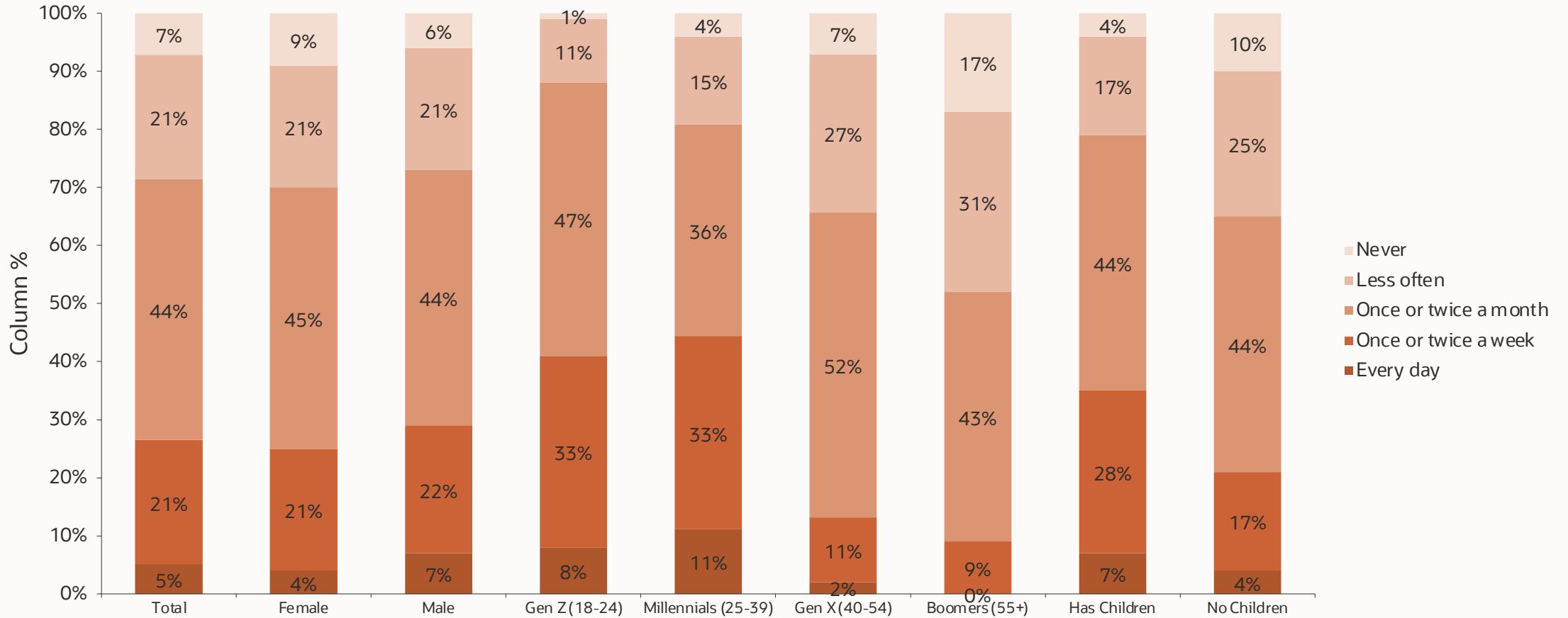
Column %

	Total	Female	Male	Gen Z (18-24)	Millennials (25-39)	Gen X (40-54)	Boomers (55+)	Has Children	No Children
Never	7%	9%	6%	1%	4%	7%	17%	4%	10%
Less often	21%	21%	21%	11%	15%	27%	31%	17%	25%
Once or twice a month	44%	45%	44%	47%	36%	52%	43%	44%	44%
Once or twice a week	21%	21%	22%	33%	33%	11%	9%	28%	17%
Every day	5%	4%	7%	8%	11%	2%	0%	7%	4%

Legend:
- Never
- Less often
- Once or twice a month
- Once or twice a week
- Every day

Sample Size = 528   Source: Untold Insights

Respondents Included = 9%, Filter Applied, (Country Profiling = UK)

Ordering preferences and wait tolerance

Preferred way to order, dining-in at a restaurant
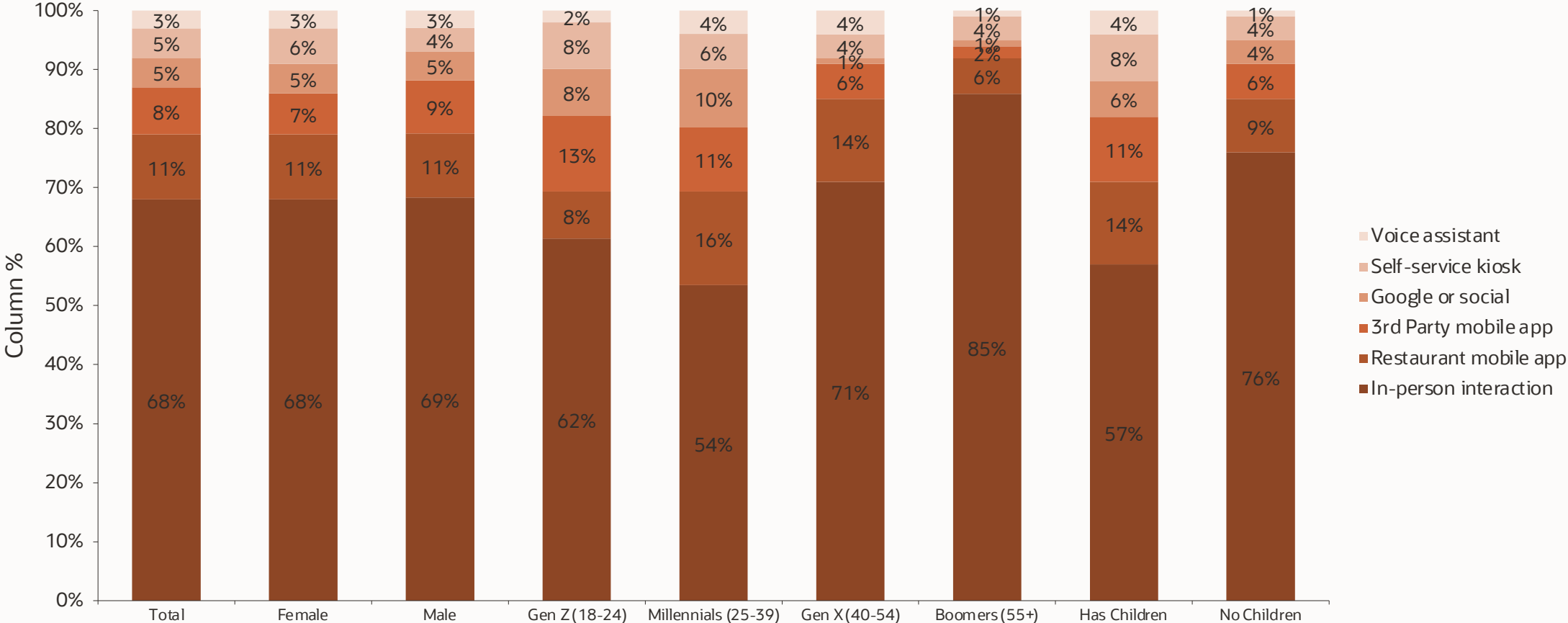
Column %

	Total	Female	Male	Gen Z (18-24)	Millennials (25-39)	Gen X (40-54)	Boomers (55+)	Has Children	No Children
Voice assistant	3%	3%	3%	2%	4%	4%	1%	4%	1%
Self-service kiosk	5%	6%	4%	8%	6%	4%	4%	—	4%
Google or social	5%	5%	5%	8%	10%	1%	1%	8%	4%
3rd Party mobile app	8%	7%	9%	13%	11%	6%	2%	6%	6%
Restaurant mobile app	11%	11%	11%	8%	16%	14%	6%	11%	9%
In-person interaction	68%	68%	69%	62%	54%	71%	85%	14% / 57%	76%

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

Sample Size = 528   Source: Untold Insights

Respondents Included = 9%, Filter Applied, (Country Profiling = UK)

Preferred way to order, when getting takeout

Column %

	Total	Female	Male	Gen Z (18-24)	Millennials (25-39)	Gen X (40-54)	Boomers (55+)	Has Children	No Children
Voice assistant	6%	6%	5%	6%	8%	3%	5%	8%	4%
Self-service kiosk	9%	9%	10%	9%	14%	7%	8%	9%	10%
Google or social	7%	8%	6%	10%	8%	6%	4%	11%	5%
3rd Party mobile app	26%	28%	24%	34%	28%	28%	13%	28%	24%
Restaurant mobile app	31%	31%	31%	34%	33%	31%	26%	32%	30%
In-person interaction	21%	18%	25%	7%	9%	23%	43%	12%	28%

Sample Size = 528   Source: Untold Insights

Respondents Included = 9%, Filter Applied, (Country Profiling = UK)

Preferred way to order, at the drive-thru
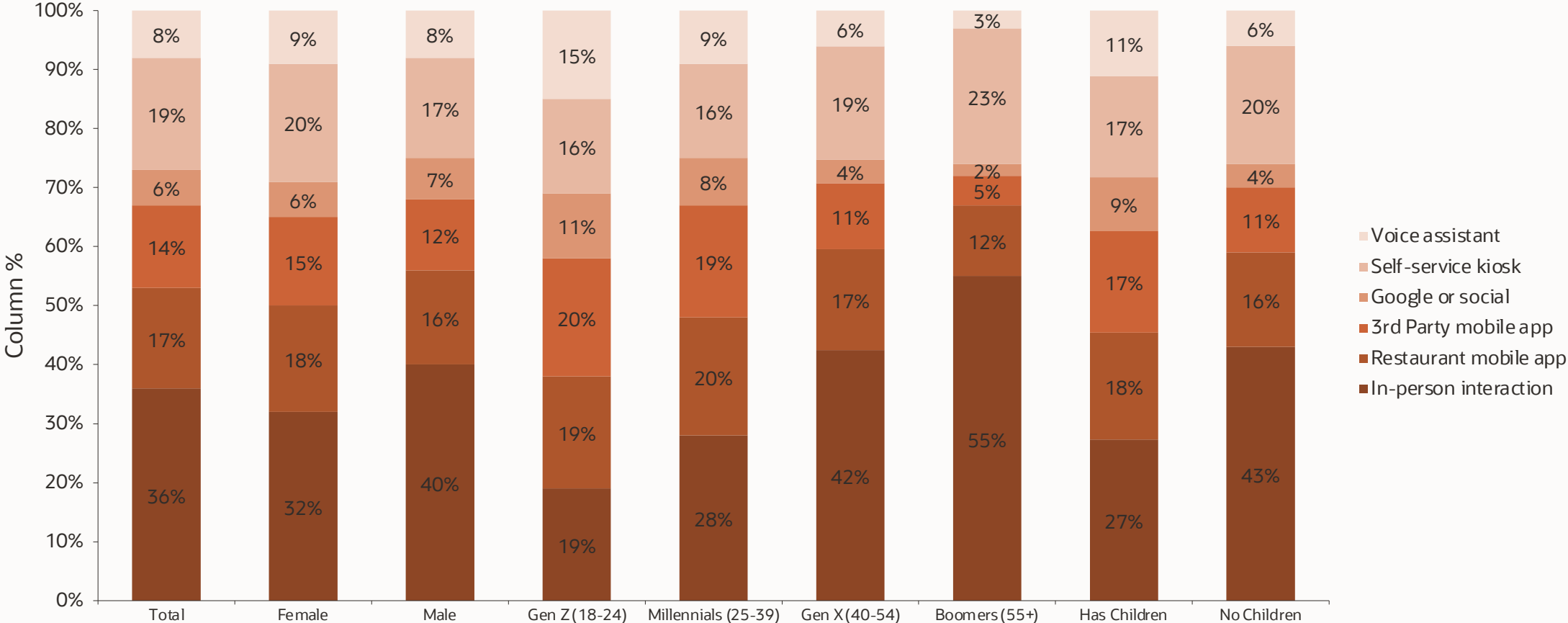
Column %

	Total	Female	Male	Gen Z (18-24)	Millennials (25-39)	Gen X (40-54)	Boomers (55+)	Has Children	No Children
Voice assistant	8%	9%	8%	15%	9%	6%	3%	11%	6%
Self-service kiosk	19%	20%	17%	16%	16%	19%	23%	17%	20%
Google or social	6%	6%	7%	11%	8%	4%	2%	9%	4%
3rd Party mobile app	14%	15%	12%	20%	19%	11%	5%	17%	11%
Restaurant mobile app	17%	18%	16%	19%	20%	17%	12%	18%	16%
In-person interaction	36%	32%	40%	19%	28%	42%	55%	27%	43%

Sample Size = 528   Source: Untold Insights

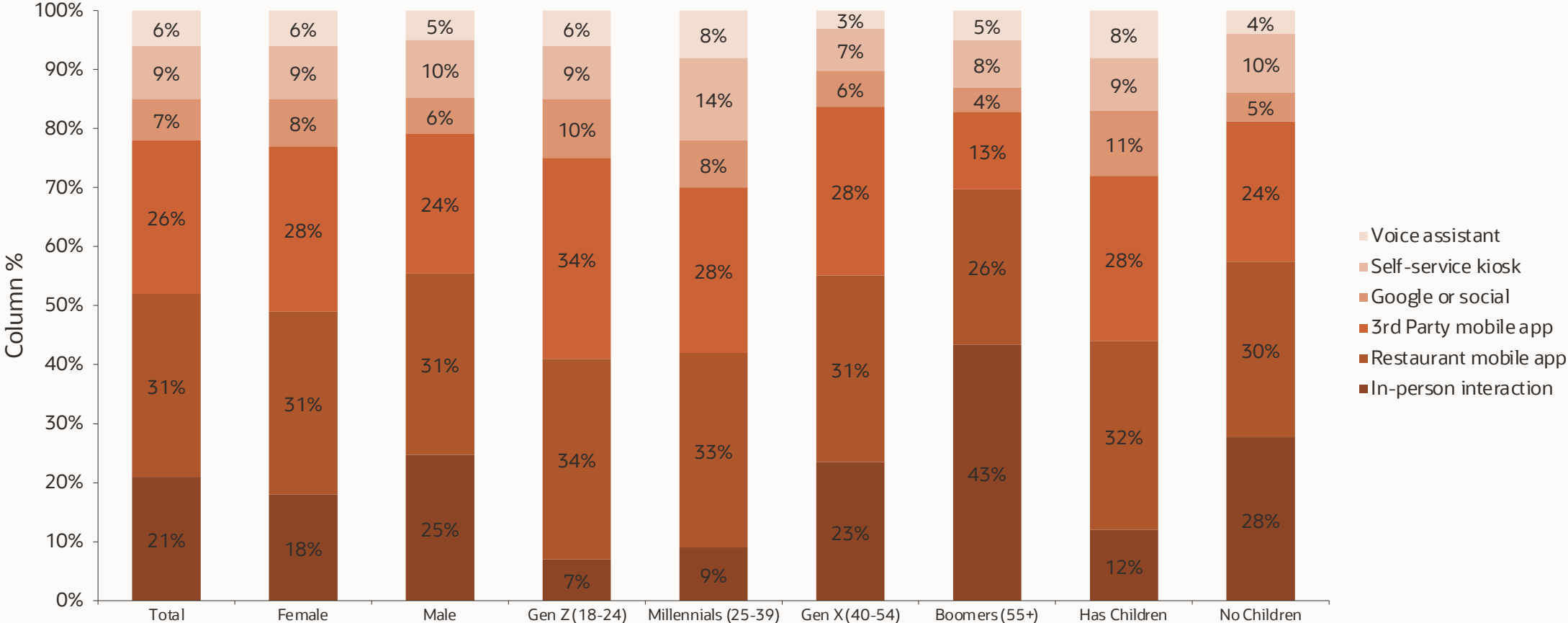Respondents Included = 9%, Filter Applied, (Country Profiling = UK)

Consumer sentiment on whether in-person orders take **significantly** longer than order-ahead and drive-thru customers
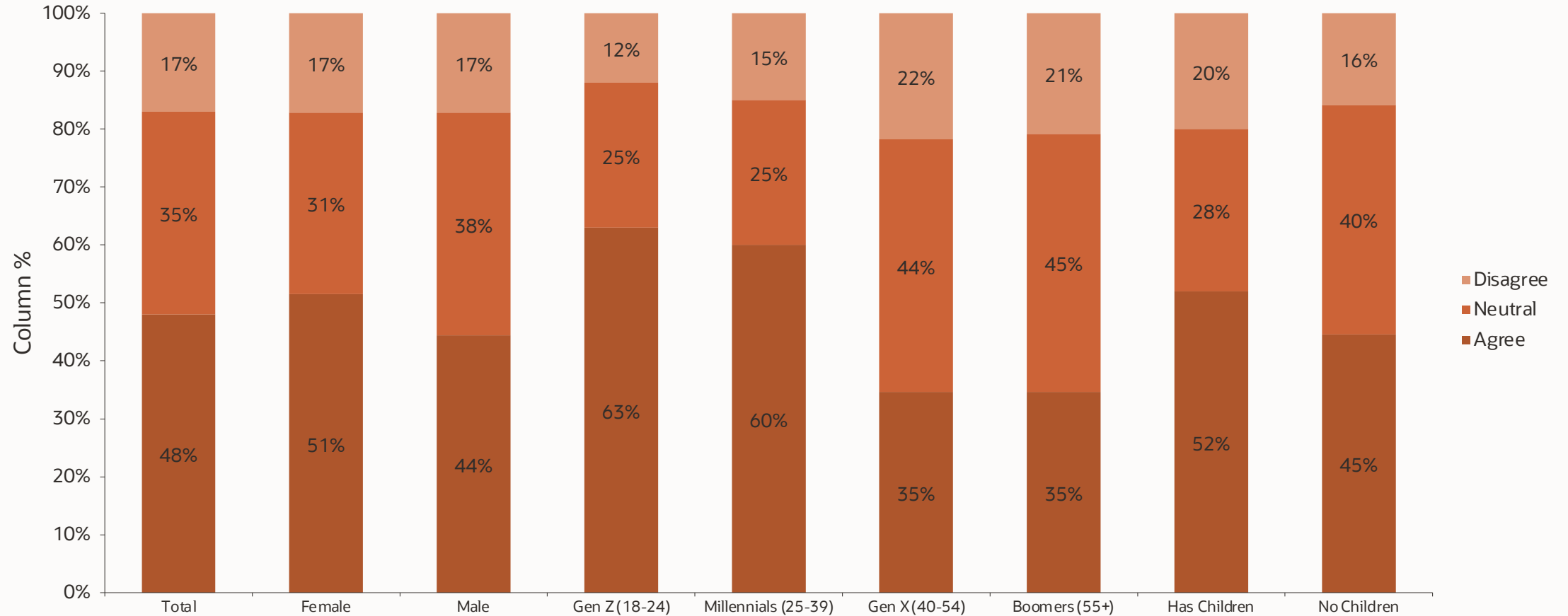
Column %

	Total	Female	Male	Gen Z (18-24)	Millennials (25-39)	Gen X (40-54)	Boomers (55+)	Has Children	No Children
Disagree	17%	17%	17%	12%	15%	22%	21%	20%	16%
Neutral	35%	31%	38%	25%	25%	44%	45%	28%	40%
Agree	48%	51%	44%	63%	60%	35%	35%	52%	45%

Sample Size = 528   Source: Untold Insights

Respondents Included = 9%, Filter Applied, (Country Profiling = UK)

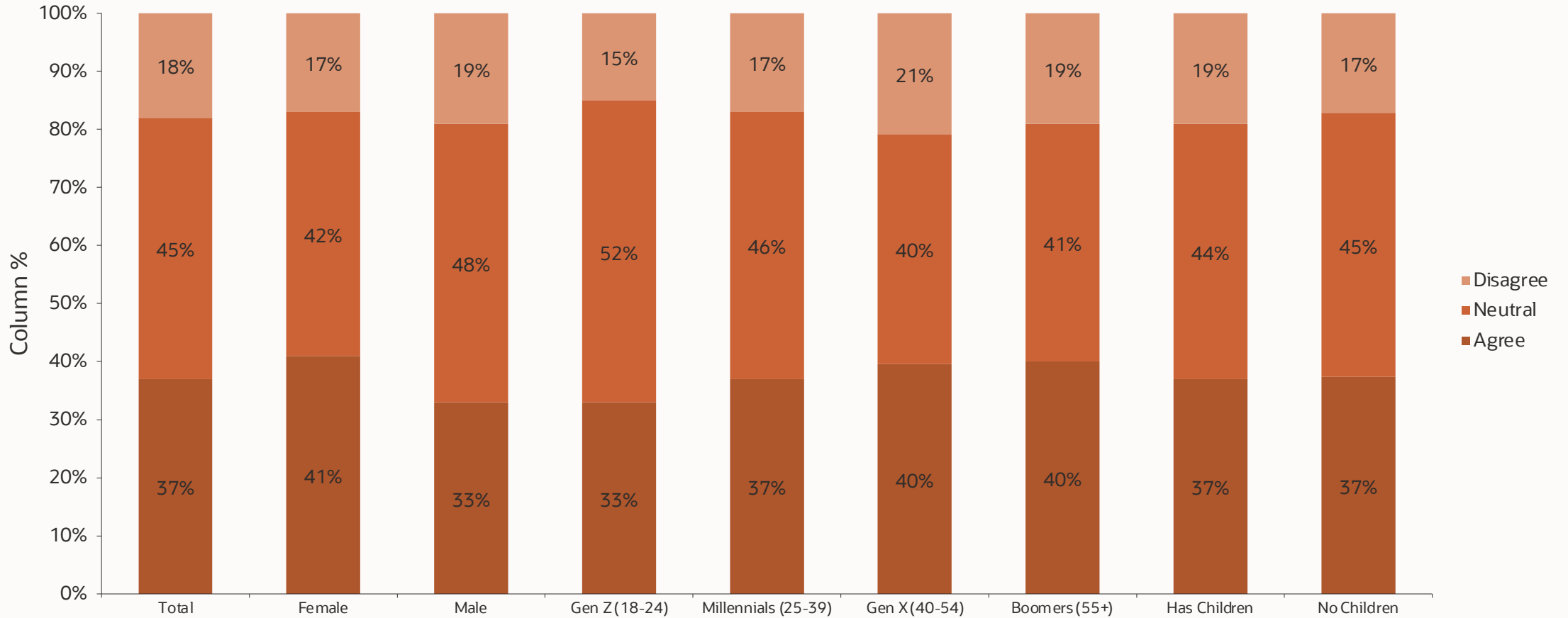# Consumer sentiment on whether online and delivery orders are prioritized over in-person customers

Column %

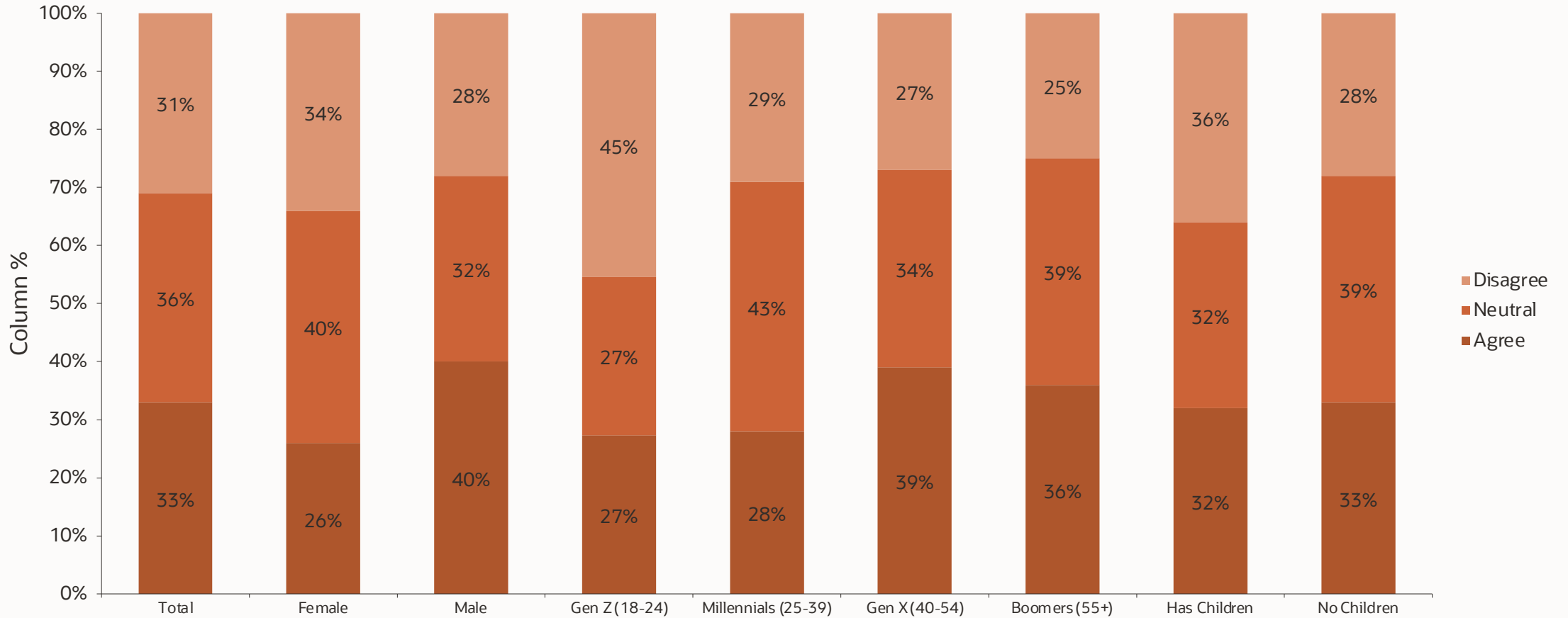|	Disagree	Neutral	Agree
Total	18%	45%	37%
Female	17%	42%	41%
Male	19%	48%	33%
Gen Z (18-24)	15%	52%	33%
Millennials (25-39)	17%	46%	37%
Gen X (40-54)	21%	40%	40%
Boomers (55+)	19%	41%	40%
Has Children	19%	44%	37%
No Children	17%	45%	37%

Sample Size = 528   Source: Untold Insights

Respondents Included = 9%, Filter Applied, (Country Profiling = UK)

Consumer sentiment on the restaurant atmosphere impact of delivery riders and drivers picking up orders

Column %

	Total	Female	Male	Gen Z (18-24)	Millennials (25-39)	Gen X (40-54)	Boomers (55+)	Has Children	No Children
Disagree	31%	34%	28%	45%	29%	27%	25%	36%	28%
Neutral	36%	40%	32%	27%	43%	34%	39%	32%	39%
Agree	33%	26%	40%	27%	28%	39%	36%	32%	33%

Sample Size = 528   Source: Untold Insights

Respondents Included = 9%, Filter Applied, (Country Profiling = UK)

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

Sample Size = 528   Source: Untold Insights

Respondents Included = 9%, Filter Applied, (Country Profiling = UK)

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

Column %

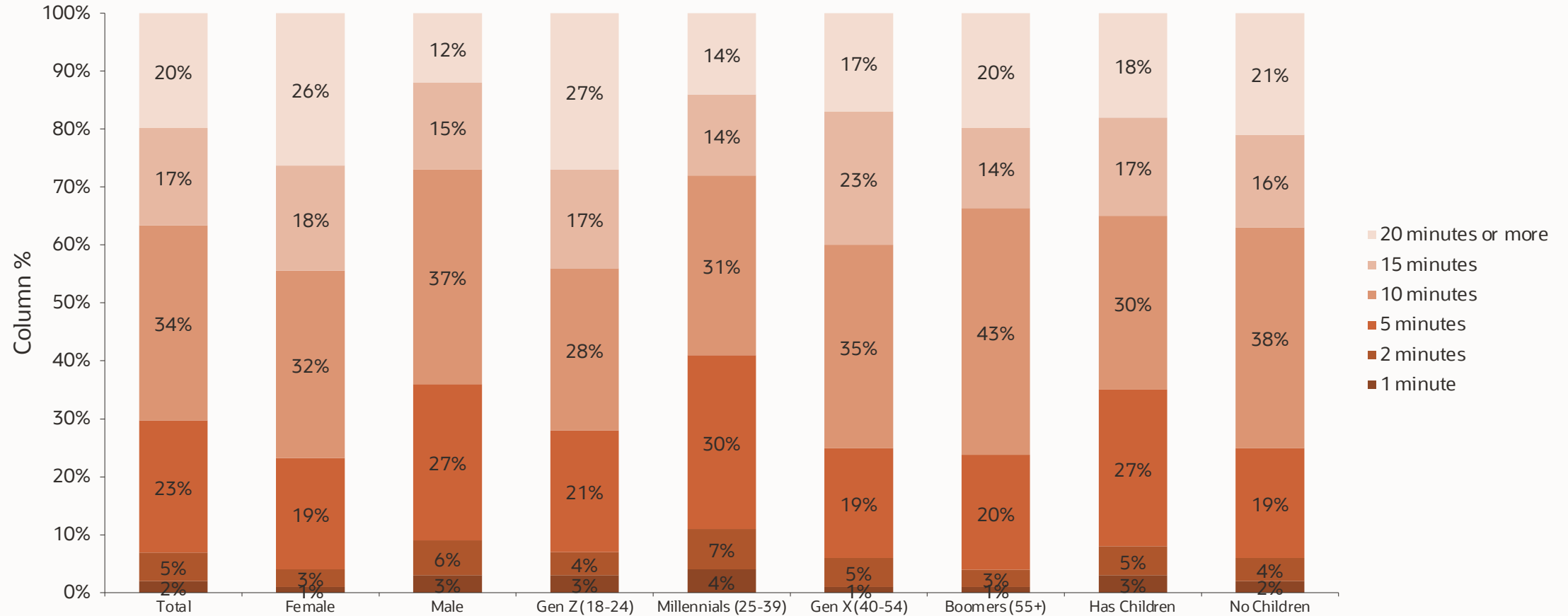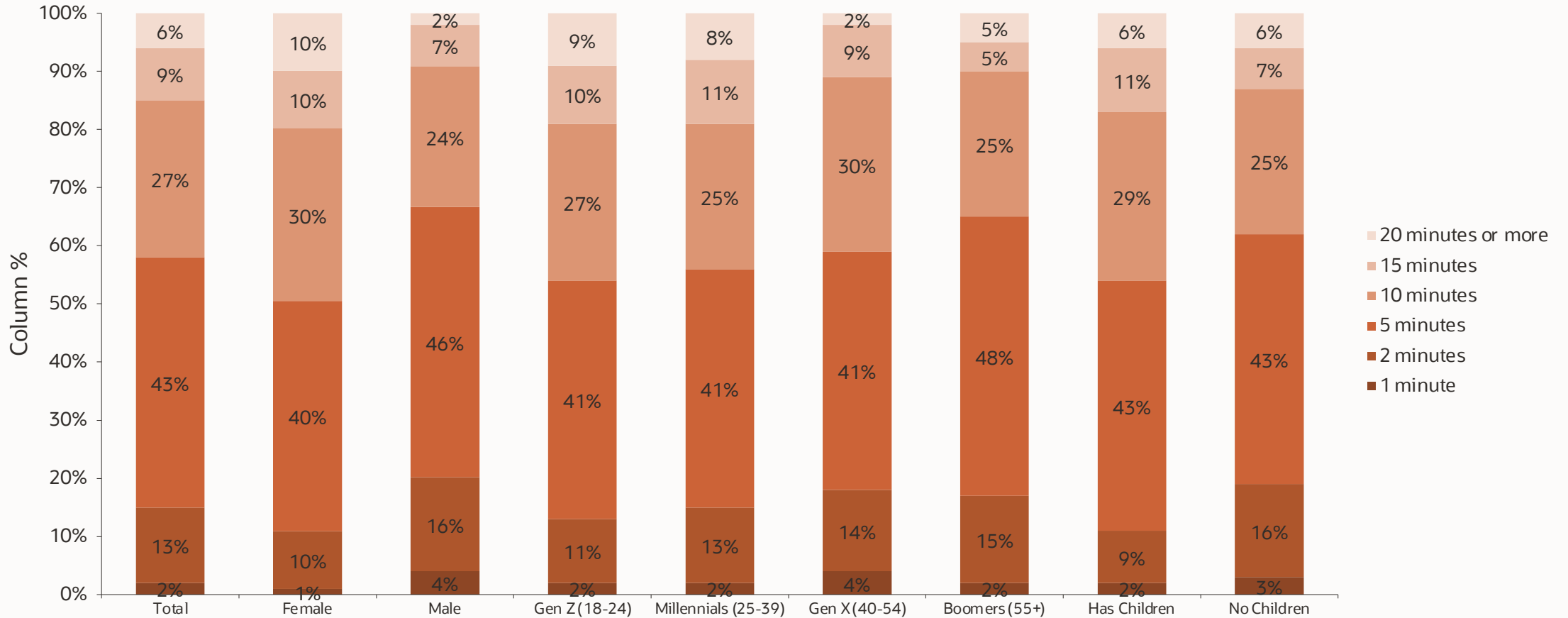|	Total	Female	Male	Gen Z (18-24)	Millennials (25-39)	Gen X (40-54)	Boomers (55+)	Has Children	No Children
20 minutes or more	6%	10%	2%	9%	8%	2%	5%	6%	6%
15 minutes	9%	10%	7%	10%	11%	9%	5%	11%	7%
10 minutes	27%	30%	24%	27%	25%	30%	25%	29%	25%
5 minutes	43%	40%	46%	41%	41%	41%	48%	43%	43%
2 minutes	13%	10%	16%	11%	13%	14%	15%	9%	16%
1 minute	2%	1%	4%	2%	2%	4%	2%	2%	3%

Sample Size = 528   Source: Untold Insights

Respondents Included = 9%, Filter Applied, (Country Profiling = UK)

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

Column %

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

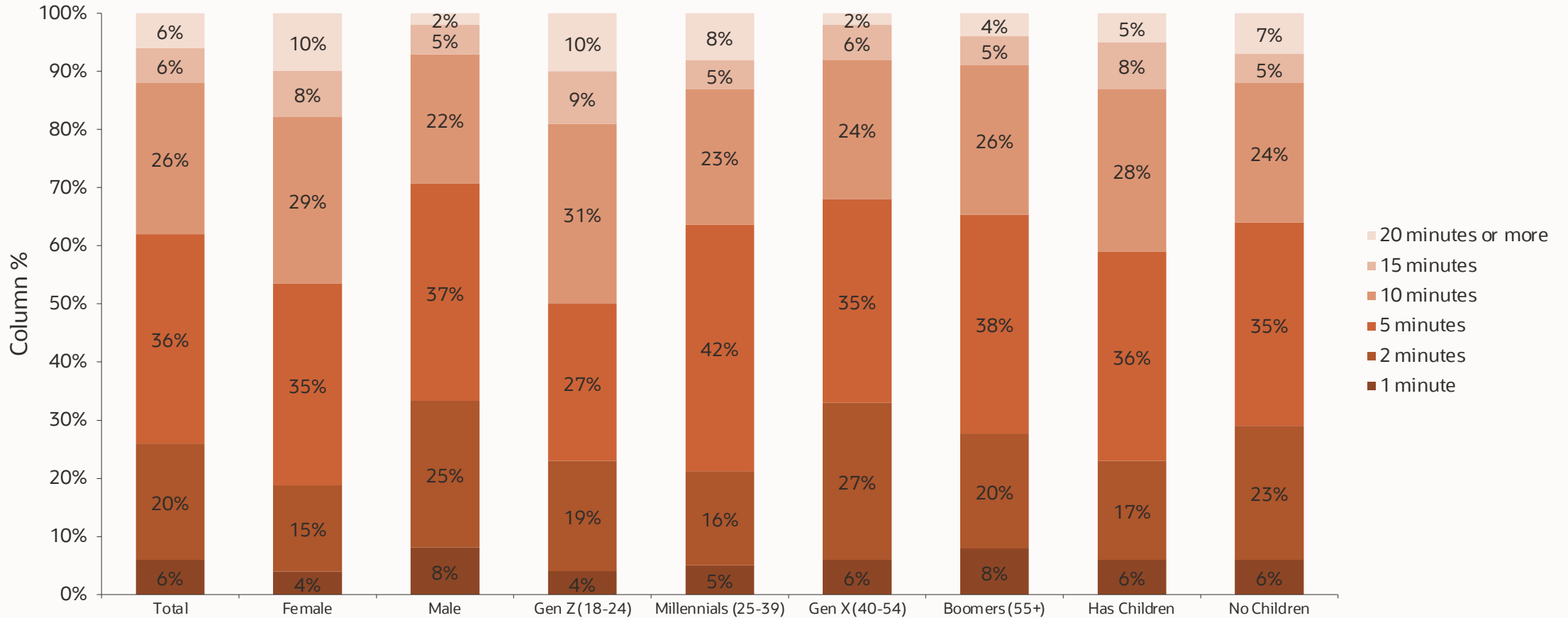|	Total	Female	Male	Gen Z (18-24)	Millennials (25-39)	Gen X (40-54)	Boomers (55+)	Has Children	No Children
20 minutes or more	6%	10%	2%	10%	8%	2%	4%	5%	7%
15 minutes	6%	8%	5%	9%	5%	6%	5%	8%	5%
10 minutes	26%	29%	22%	31%	23%	24%	26%	28%	24%
5 minutes	36%	35%	37%	27%	42%	35%	38%	36%	35%
2 minutes	20%	15%	25%	19%	16%	27%	20%	17%	23%
1 minute	6%	4%	8%	4%	5%	6%	8%	6%	6%

Sample Size = 528   Source: Untold Insights

Respondents Included = 9%, Filter Applied, (Country Profiling = UK)

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

Column %

	Total	Female	Male	Gen Z (18-24)	Millennials (25-39)	Gen X (40-54)	Boomers (55+)	Has Children	No Children
20 minutes or more	35%	41%	27%	37%	27%	42%	34%	32%	37%
15 minutes	23%	23%	23%	20%	16%	23%	31%	18%	26%
10 minutes	22%	19%	25%	19%	26%	19%	23%	22%	22%
5 minutes	16%	14%	17%	16%	23%	14%	10%	20%	12%
2 minutes	4%	2%	7%	6%	8%	3%	1%	6%	3%
1 minute	1%	1%	1%	2%	2%	0%	1%	2%	1%

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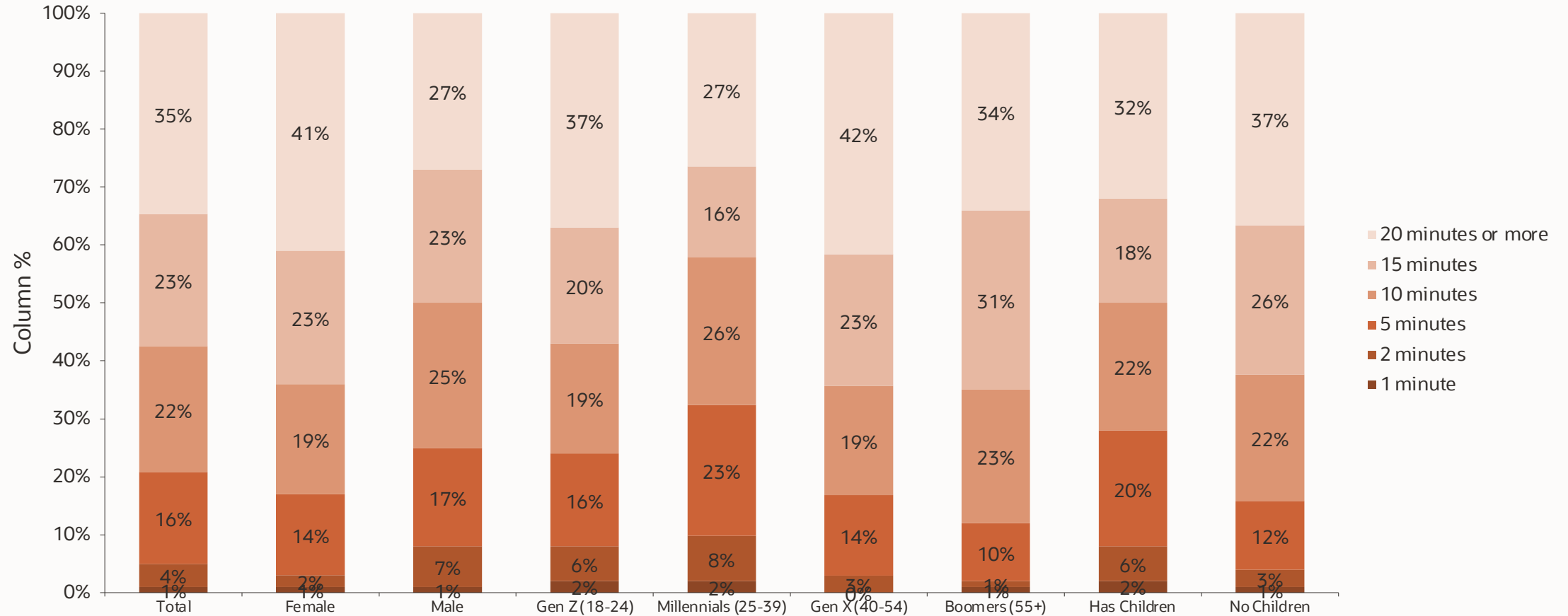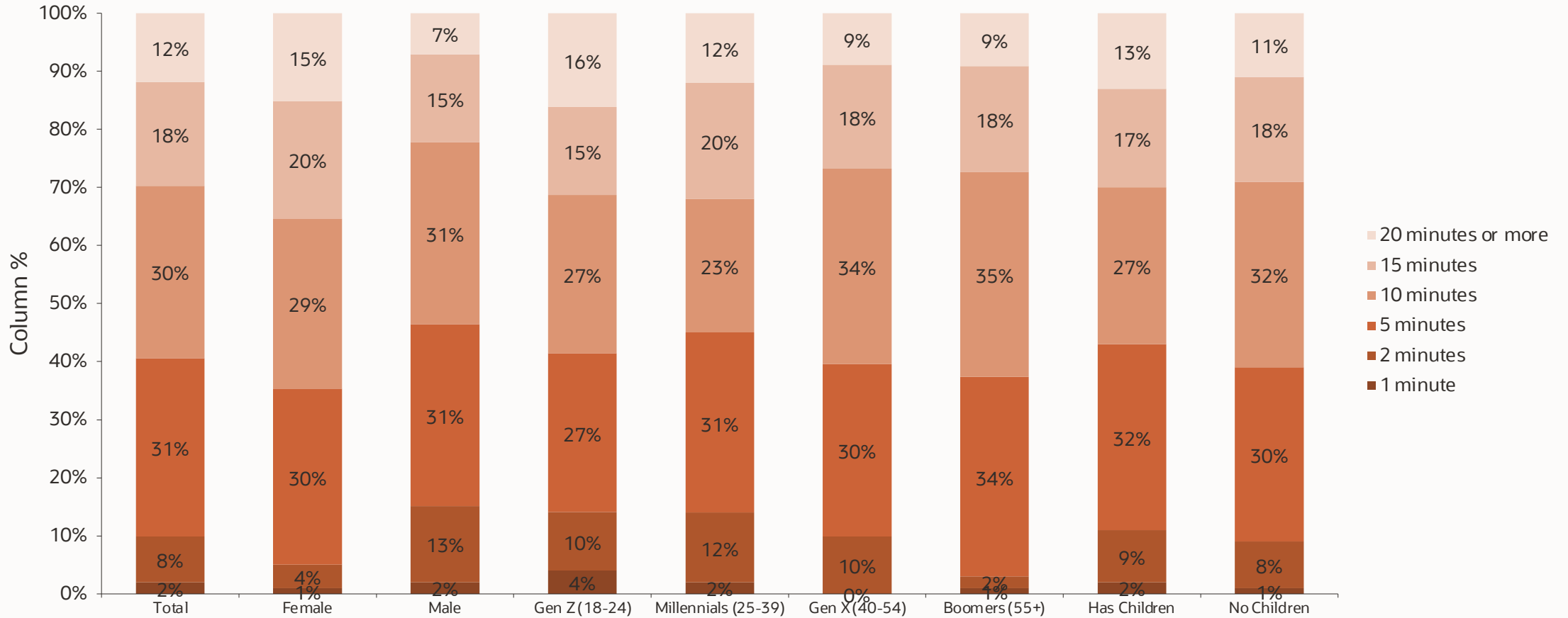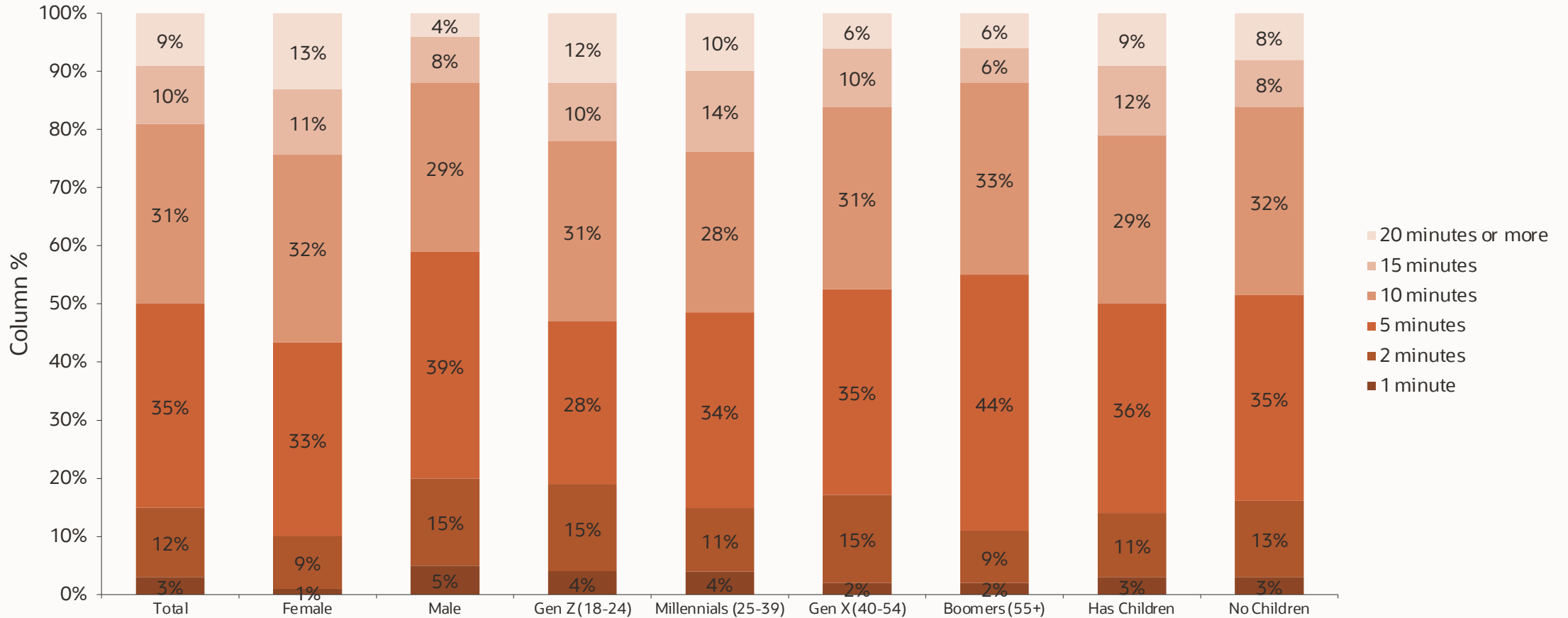- 5 minutes
- 2 minutes
- 1 minute

Sample Size = 528   Source: Untold Insights

Respondents Included = 9%, Filter Applied, (Country Profiling = UK)

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

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

Column %

	Total	Female	Male	Gen Z (18-24)	Millennials (25-39)	Gen X (40-54)	Boomers (55+)	Has Children	No Children
20 minutes or more	9%	13%	4%	12%	10%	6%	6%	9%	8%
15 minutes	10%	11%	8%	10%	14%	10%	6%	12%	8%
10 minutes	31%	32%	29%	31%	28%	31%	33%	29%	32%
5 minutes	35%	33%	39%	28%	34%	35%	44%	36%	35%
2 minutes	12%	9%	15%	15%	11%	15%	9%	11%	13%
1 minute	3%	1%	5%	4%	4%	2%	2%	3%	3%

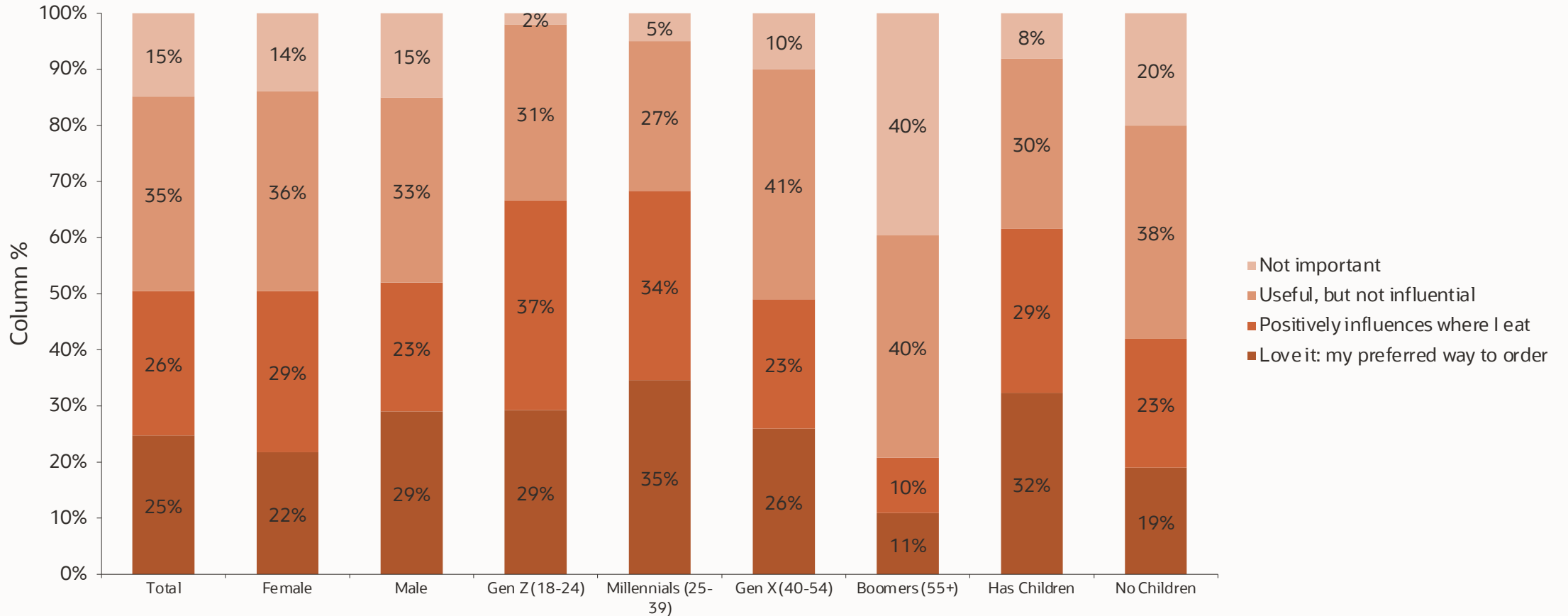Sample Size = 528   Source: Untold Insights

Respondents Included = 9%, Filter Applied, (Country Profiling = UK)

Click and collect influence on spend and loyalty

Consumer sentiment on click and collect service offer

Column %

	Total	Female	Male	Gen Z (18-24)	Millennials (25-39)	Gen X (40-54)	Boomers (55+)	Has Children	No Children
Not important	15%	14%	15%	2%	5%	10%	40%	8%	20%
Useful, but not influential	35%	36%	33%	31%	27%	41%	40%	30%	38%
Positively influences where I eat	26%	29%	23%	37%	34%	23%	10%	29%	23%
Love it: my preferred way to order	25%	22%	29%	29%	35%	26%	11%	32%	19%

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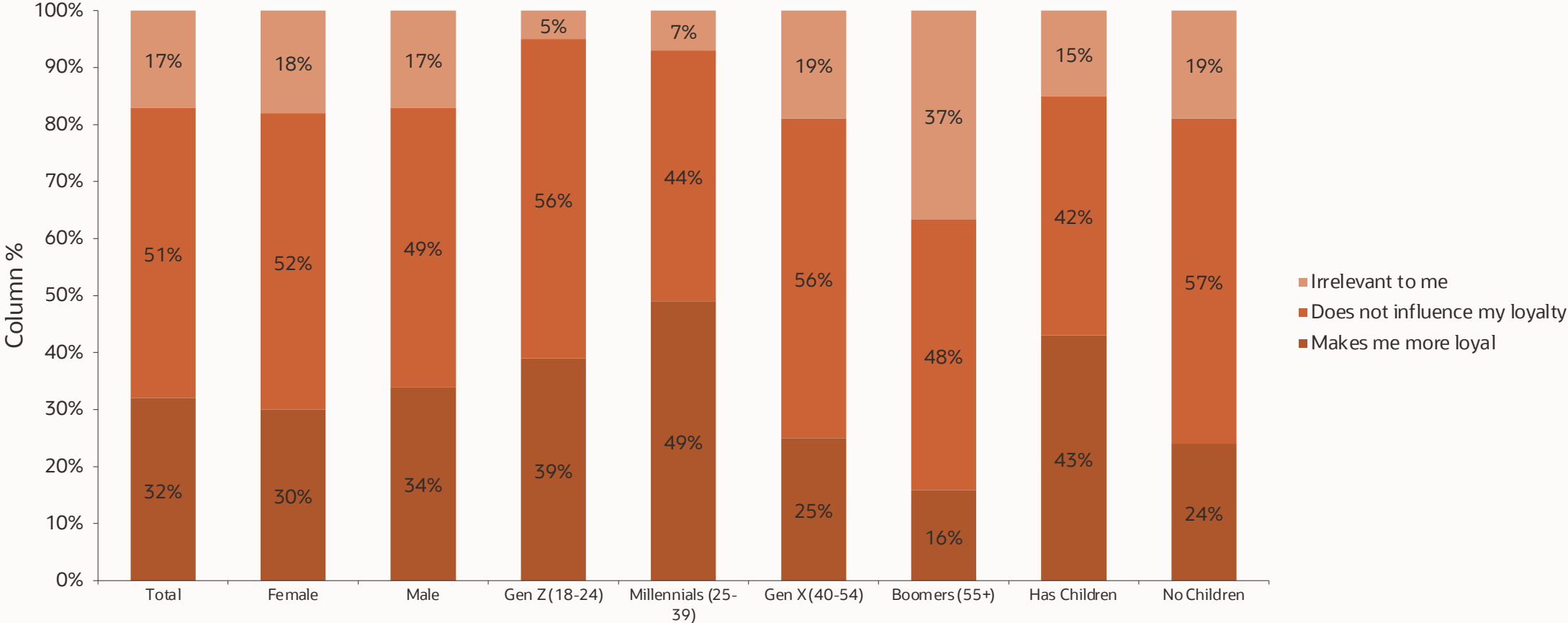- Love it: my preferred way to order

Sample Size = 528   Source: Untold Insights

Respondents Included = 9%, Filter Applied, (Country Profiling = UK)

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

Column %

	Total	Female	Male	Gen Z (18-24)	Millennials (25-39)	Gen X (40-54)	Boomers (55+)	Has Children	No Children
Irrelevant to me	17%	18%	17%	5%	7%	19%	37%	15%	19%
Does not influence my loyalty	51%	52%	49%	56%	44%	56%	48%	42%	57%
Makes me more loyal	32%	30%	34%	39%	49%	25%	16%	43%	24%

Sample Size = 528   Source: Untold Insights

Respondents Included = 9%, Filter Applied, (Country Profiling = UK)

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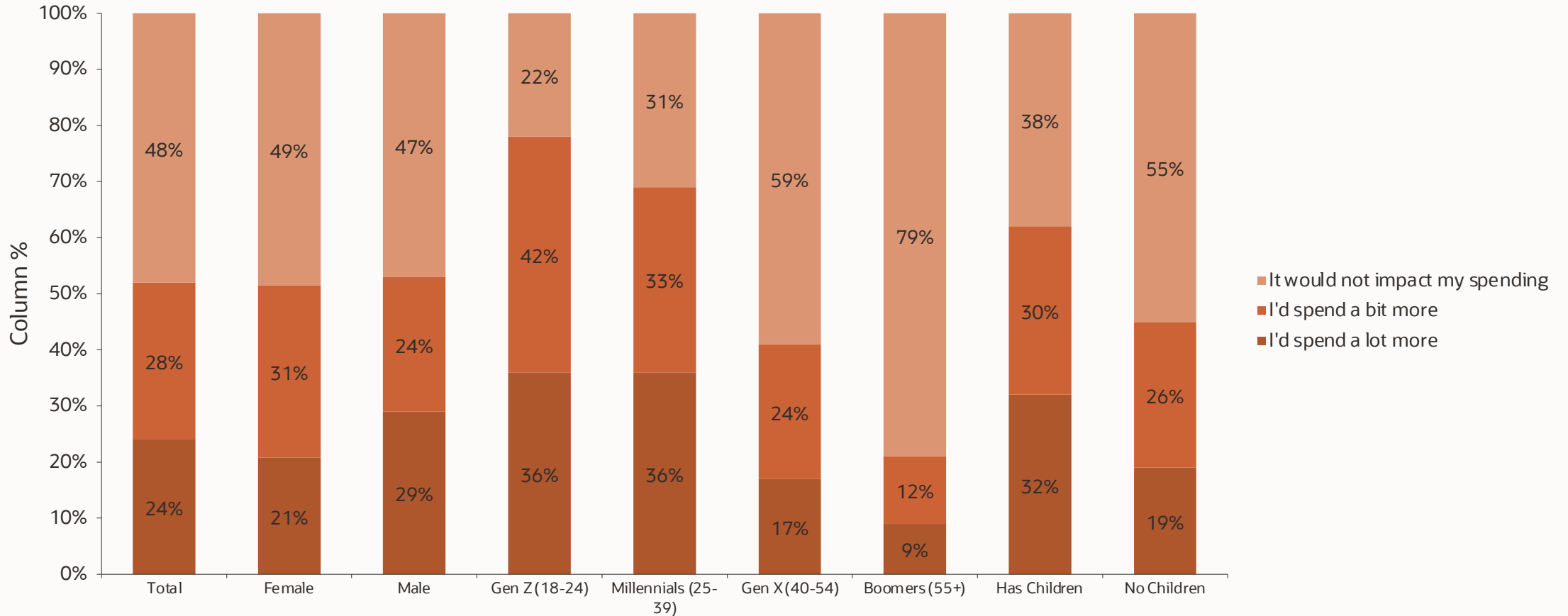
Column %

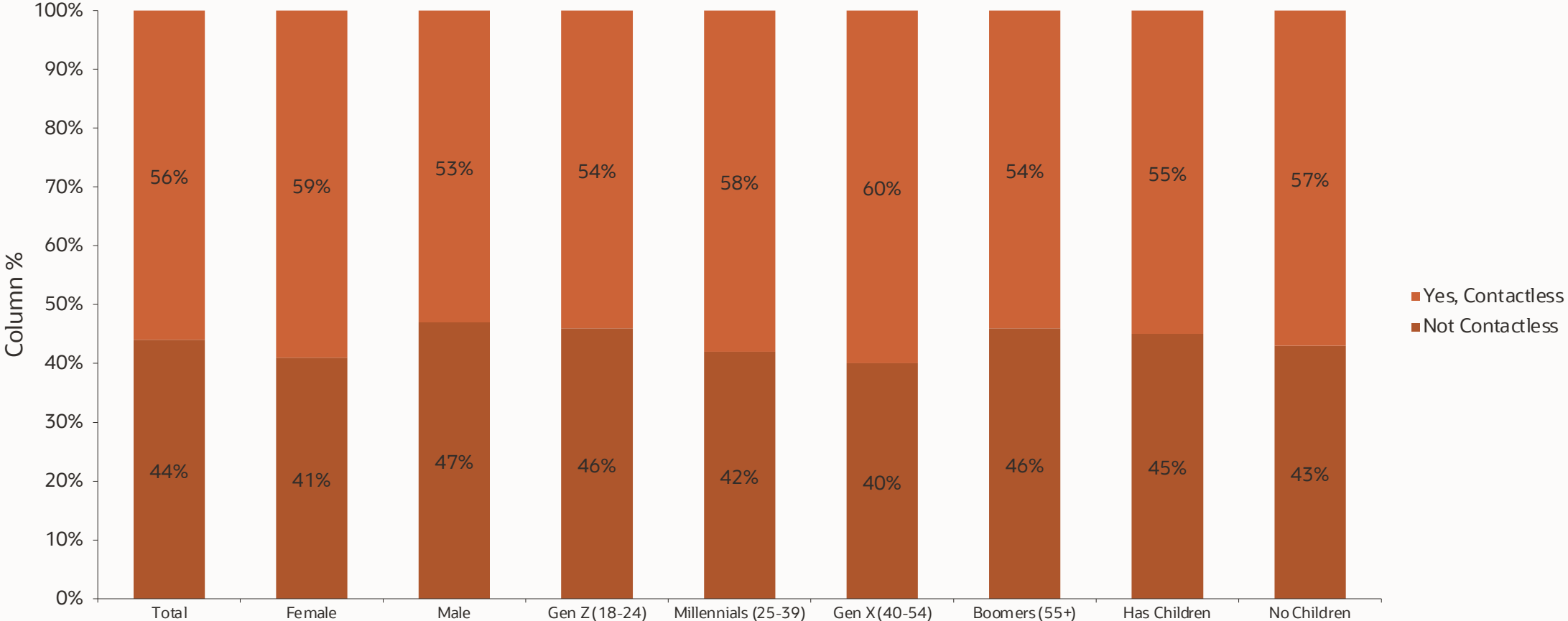|	It would not impact my spending	I'd spend a bit more	I'd spend a lot more
Total	48%	28%	24%
Female	49%	31%	21%
Male	47%	24%	29%
Gen Z (18-24)	22%	42%	36%
Millennials (25-39)	31%	33%	36%
Gen X (40-54)	59%	24%	17%
Boomers (55+)	79%	12%	9%
Has Children	38%	30%	32%
No Children	55%	26%	19%

Sample Size = 528   Source: Untold Insights

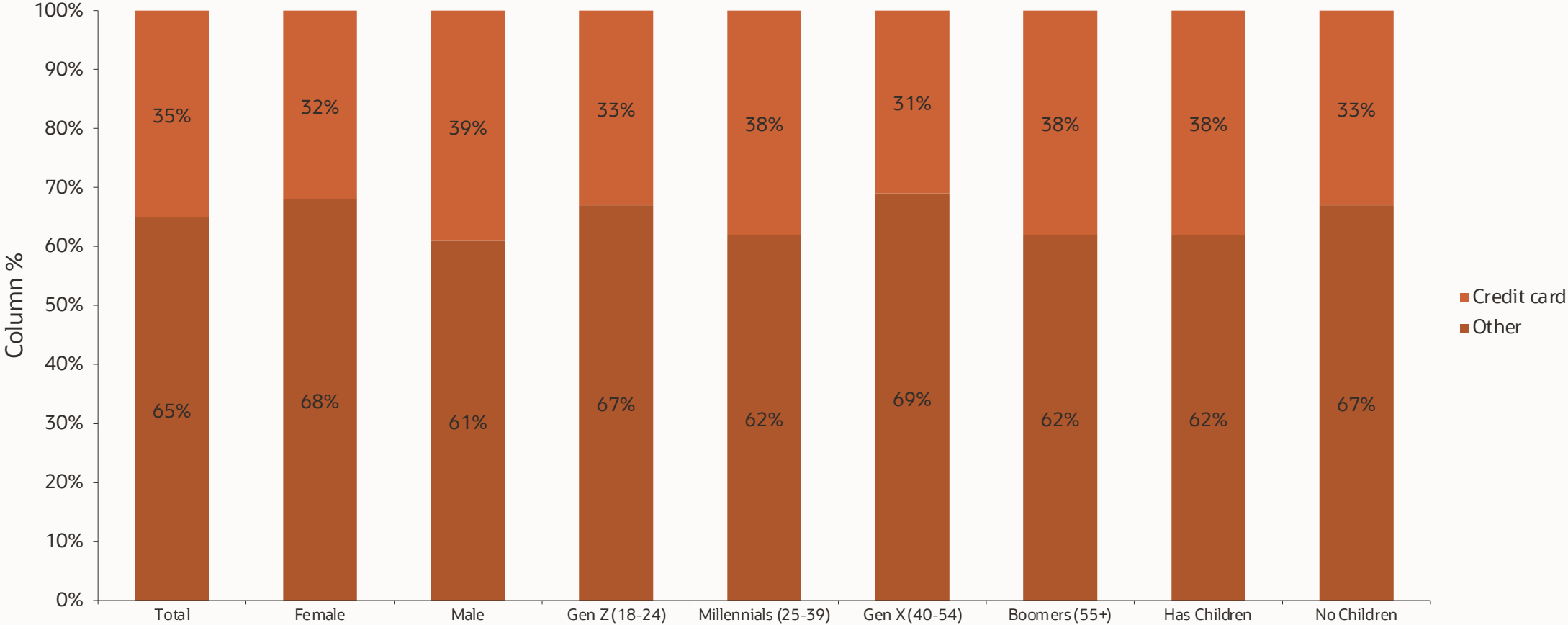Respondents Included = 9%, Filter Applied, (Country Profiling = UK)

Payment preferences

Preferred way to pay: contactless or no?

Column %

	Total	Female	Male	Gen Z (18-24)	Millennials (25-39)	Gen X (40-54)	Boomers (55+)	Has Children	No Children
Yes, Contactless	56%	59%	53%	54%	58%	60%	54%	55%	57%
Not Contactless	44%	41%	47%	46%	42%	40%	46%	45%	43%

■ Yes, Contactless
■ Not Contactless

Preferred way to pay: credit card or other?

Column %

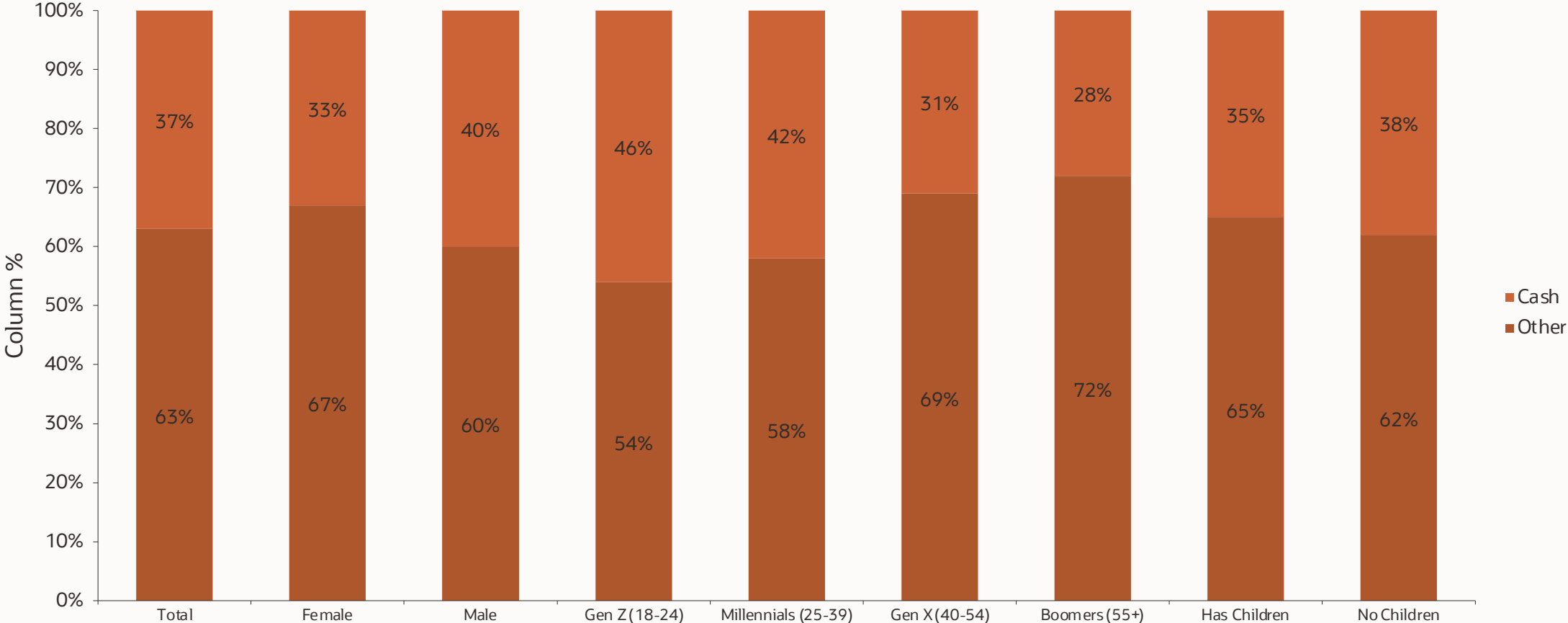|	Total	Female	Male	Gen Z (18-24)	Millennials (25-39)	Gen X (40-54)	Boomers (55+)	Has Children	No Children
Credit card	35%	32%	39%	33%	38%	31%	38%	38%	33%
Other	65%	68%	61%	67%	62%	69%	62%	62%	67%

■ Credit card
■ Other

Sample Size = 528   Source: Untold Insights

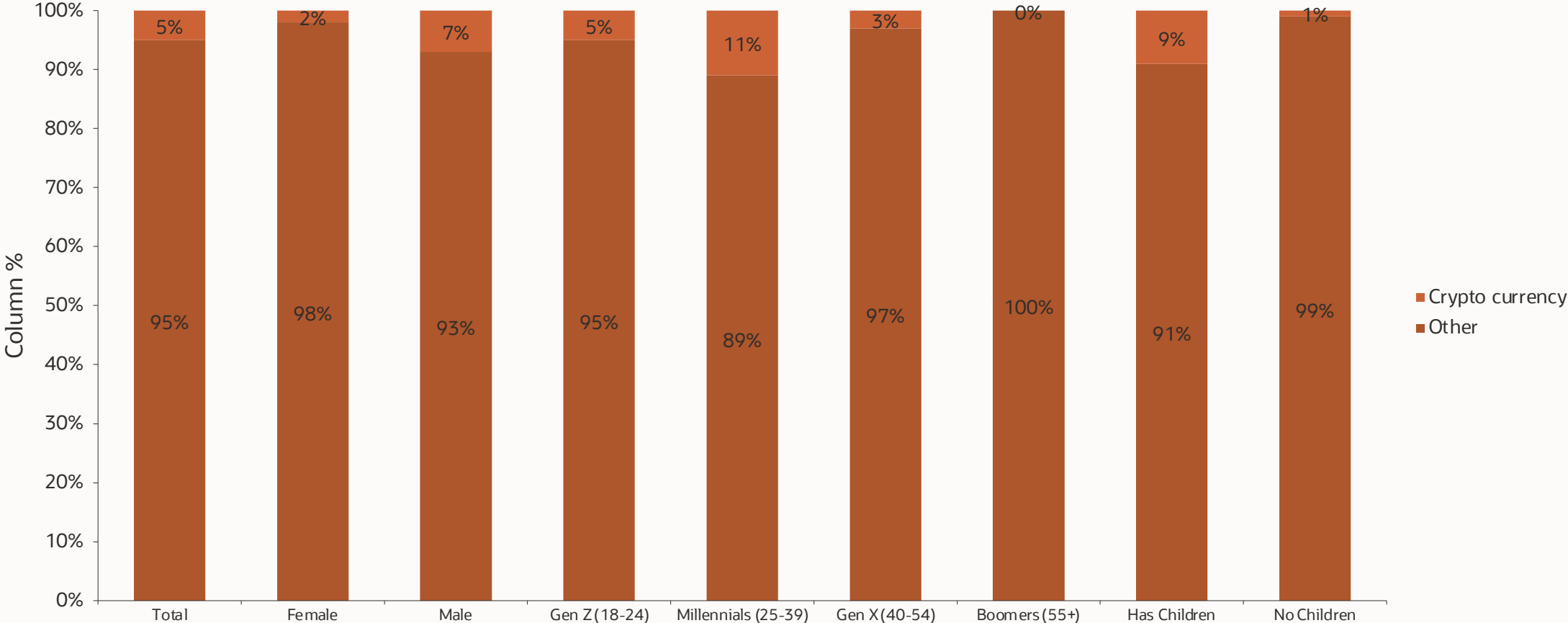Respondents Included = 9%, Filter Applied, (Country Profiling = UK)

Preferred way to pay: cash or other?

Column %

	Total	Female	Male	Gen Z (18-24)	Millennials (25-39)	Gen X (40-54)	Boomers (55+)	Has Children	No Children
Cash	37%	33%	40%	46%	42%	31%	28%	35%	38%
Other	63%	67%	60%	54%	58%	69%	72%	65%	62%

Sample Size = 528   Source: Untold Insights

Respondents Included = 9%, Filter Applied, (Country Profiling = UK)

Preferred way to pay: Crypto currency or other?

Column %

Legend:
- Crypto currency
- Other

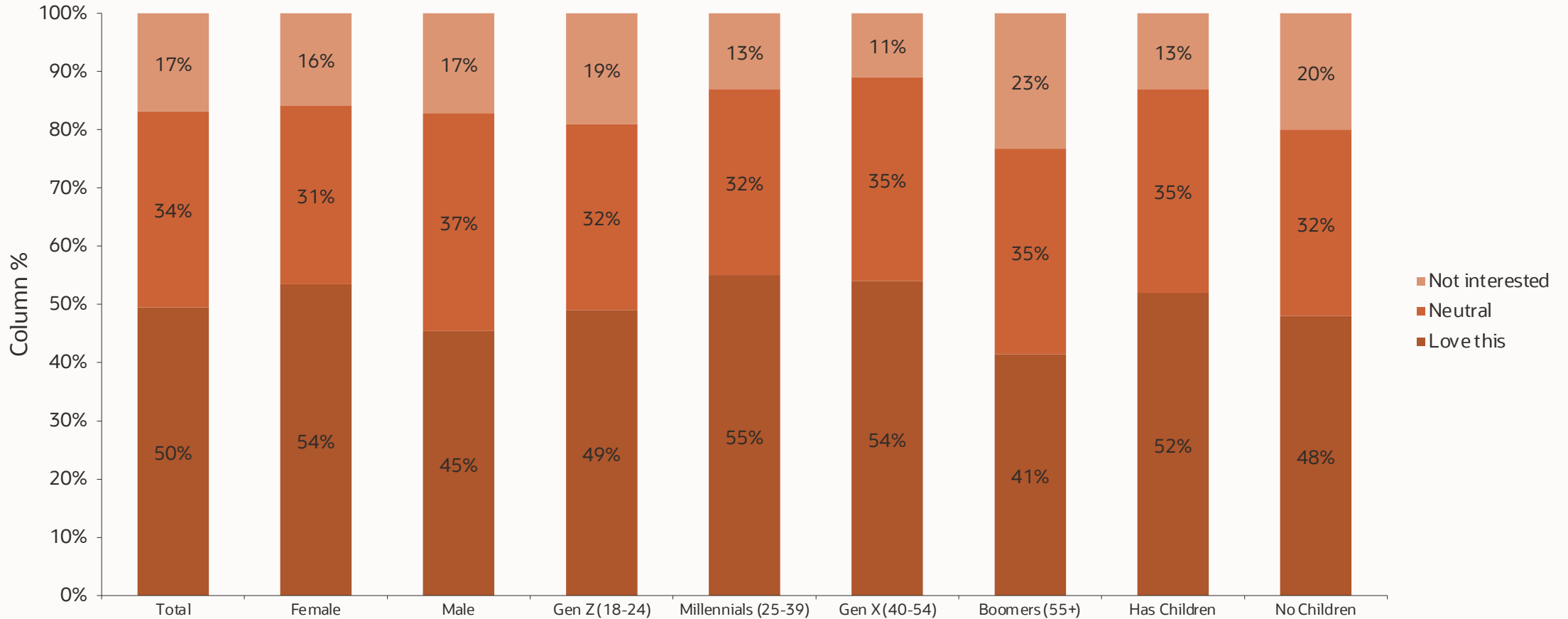|	Total	Female	Male	Gen Z (18-24)	Millennials (25-39)	Gen X (40-54)	Boomers (55+)	Has Children	No Children
Crypto currency	5%	2%	7%	5%	11%	3%	0%	9%	1%
Other	95%	98%	93%	95%	89%	97%	100%	91%	99%

Sample Size = 528   Source: Untold Insights

Respondents Included = 9%, Filter Applied, (Country Profiling = UK)

Personal offers and data management

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

Column %

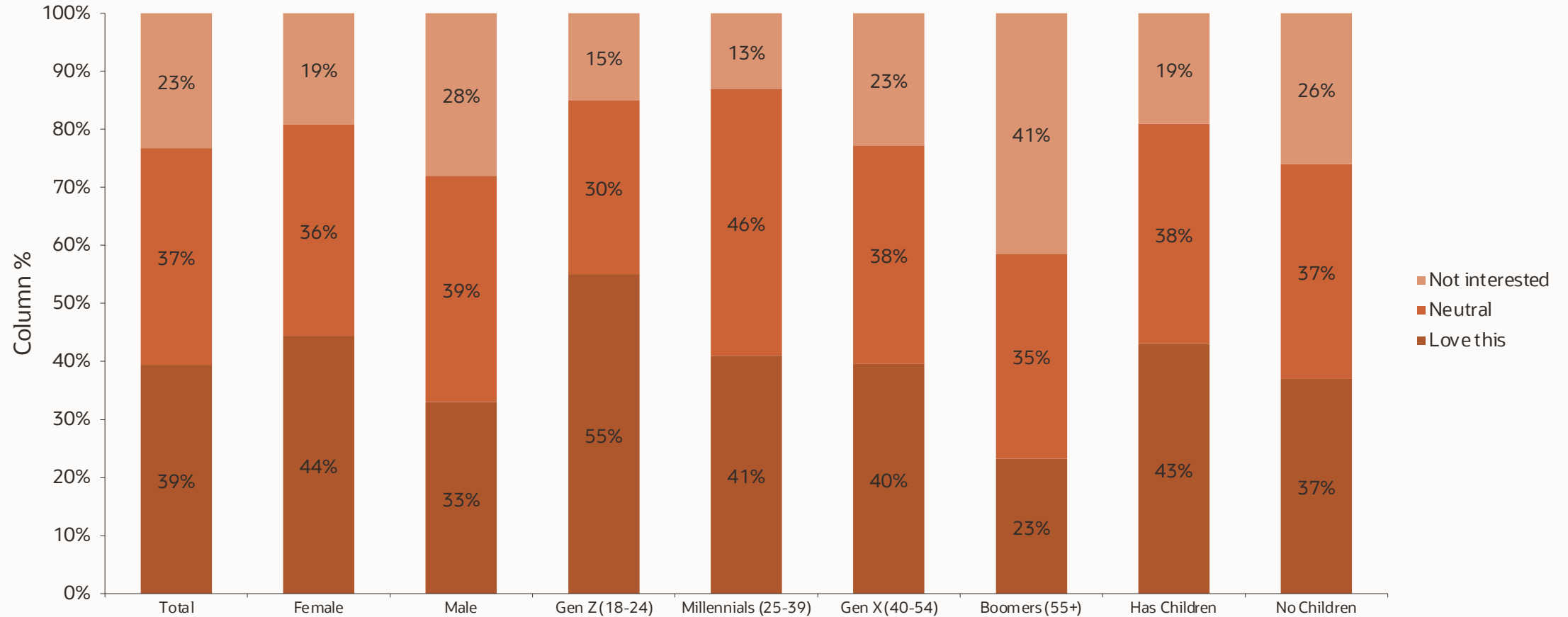|	Total	Female	Male	Gen Z (18-24)	Millennials (25-39)	Gen X (40-54)	Boomers (55+)	Has Children	No Children
Not interested	17%	16%	17%	19%	13%	11%	23%	13%	20%
Neutral	34%	31%	37%	32%	32%	35%	35%	35%	32%
Love this	50%	54%	45%	49%	55%	54%	41%	52%	48%

Sample Size = 528   Source: Untold Insights

Respondents Included = 9%, Filter Applied, (Country Profiling = UK)

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

Column %

Legend:
- Not interested
- Neutral
- Love this

| Category	Not interested	Neutral	Love this
Total	23%	37%	39%
Female	19%	36%	44%
Male	28%	39%	33%
Gen Z (18-24)	15%	30%	55%
Millennials (25-39)	13%	46%	41%
Gen X (40-54)	23%	38%	40%
Boomers (55+)	41%	35%	23%
Has Children	19%	38%	43%
No Children	26%	37%	37%

Sample Size = 528   Source: Untold Insights

Respondents Included = 9%, Filter Applied, (Country Profiling = UK)

Consumer sentiment on receiving preference suggestions based on their purchase history
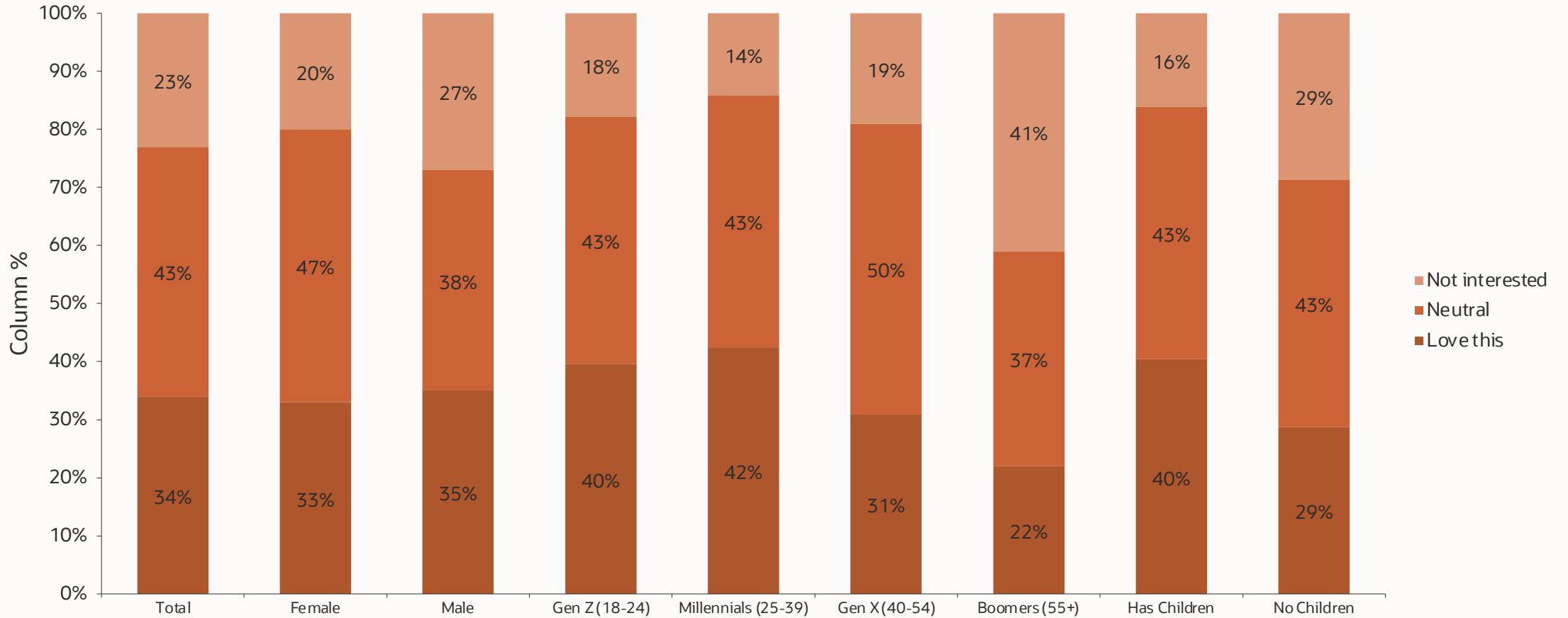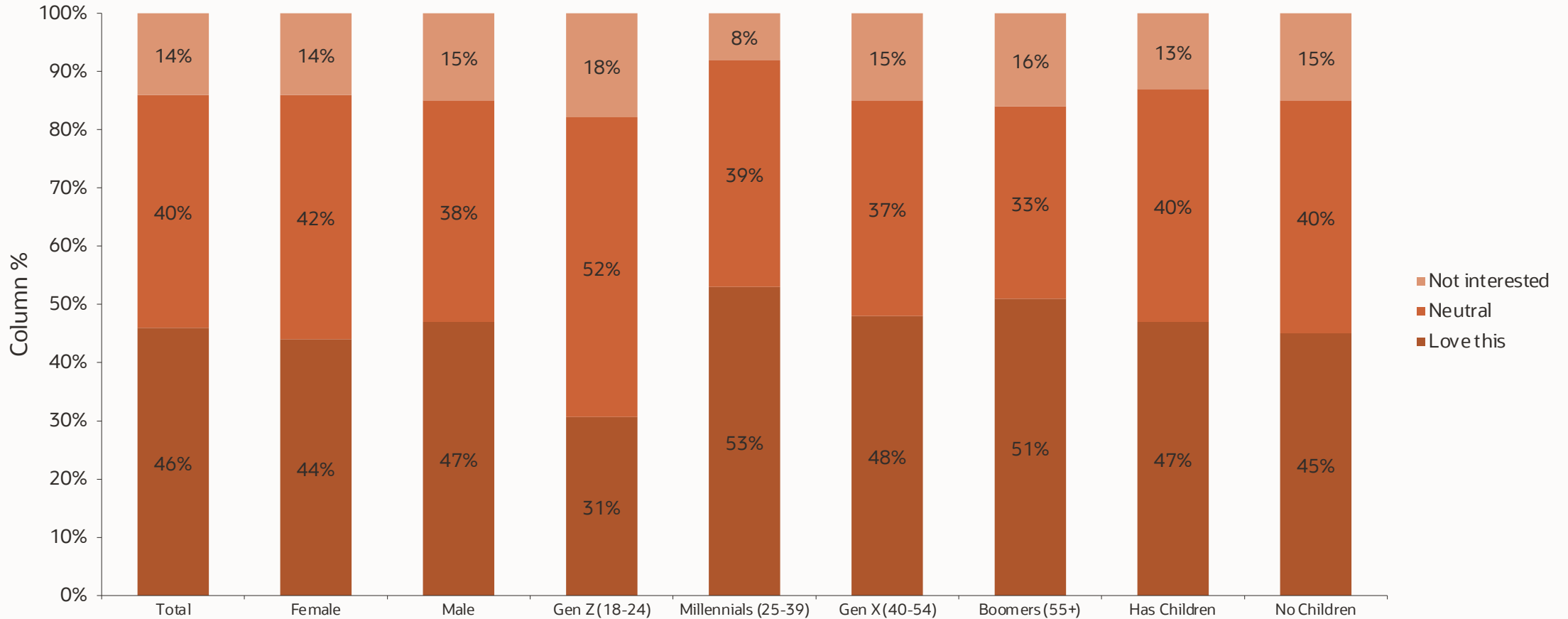
Sample Size = 528   Source: Untold Insights

Respondents Included = 9%, Filter Applied, (Country Profiling = UK)

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

Column %

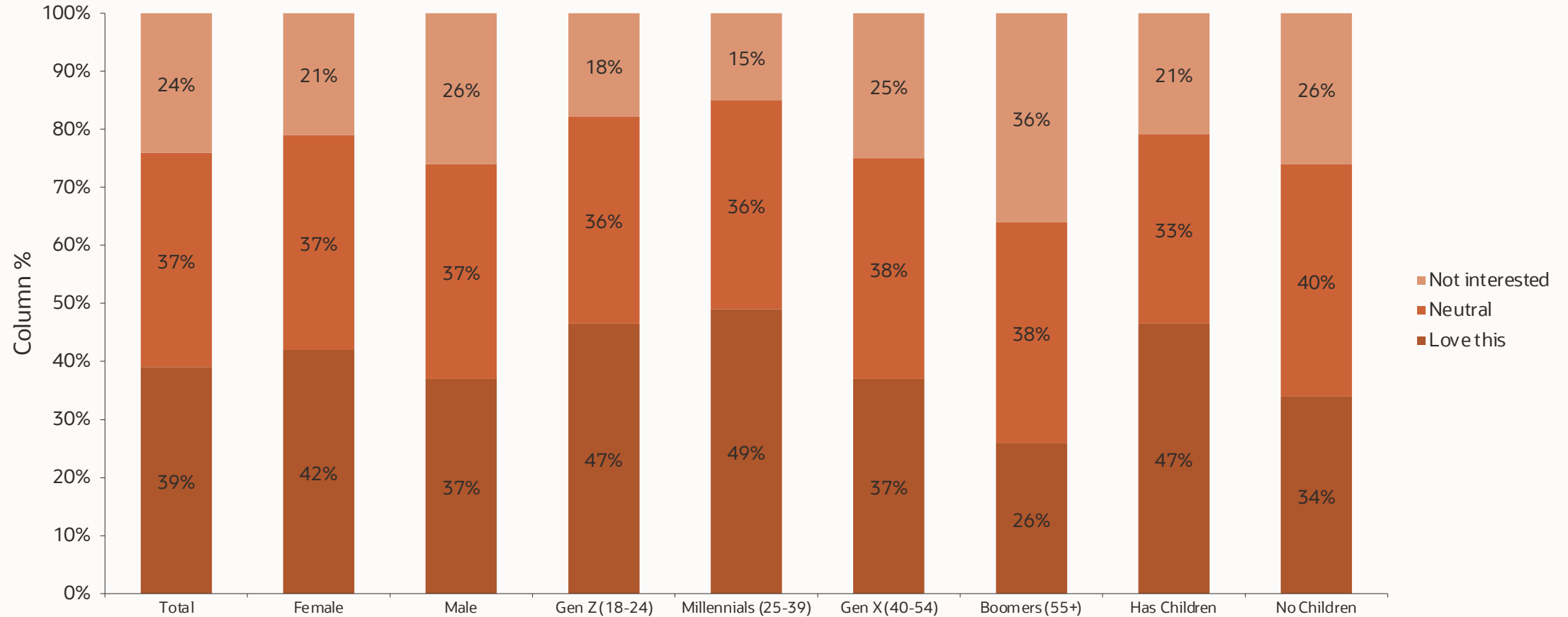|	Total	Female	Male	Gen Z (18-24)	Millennials (25-39)	Gen X (40-54)	Boomers (55+)	Has Children	No Children
Not interested	14%	14%	15%	18%	8%	15%	16%	13%	15%
Neutral	40%	42%	38%	52%	39%	37%	33%	40%	40%
Love this	46%	44%	47%	31%	53%	48%	51%	47%	45%

Sample Size = 528   Source: Untold Insights

Respondents Included = 9%, Filter Applied, (Country Profiling = UK)

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

Column %

	Total	Female	Male	Gen Z (18-24)	Millennials (25-39)	Gen X (40-54)	Boomers (55+)	Has Children	No Children
Not interested	24%	21%	26%	18%	15%	25%	36%	21%	26%
Neutral	37%	37%	37%	36%	36%	38%	38%	33%	40%
Love this	39%	42%	37%	47%	49%	37%	26%	47%	34%

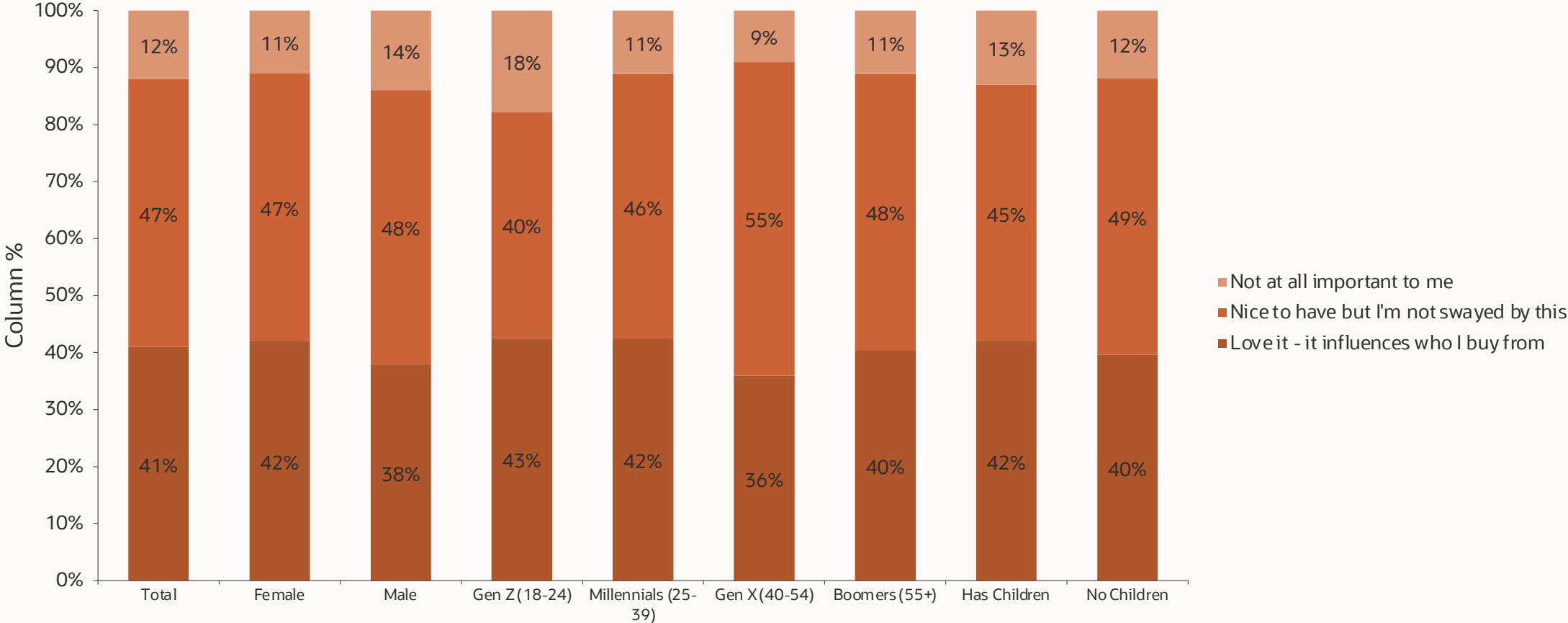Sample Size = 528   Source: Untold Insights

Respondents Included = 9%, Filter Applied, (Country Profiling = UK)

Environmental, sustainability and corporate governance (ESG) influence on loyalty
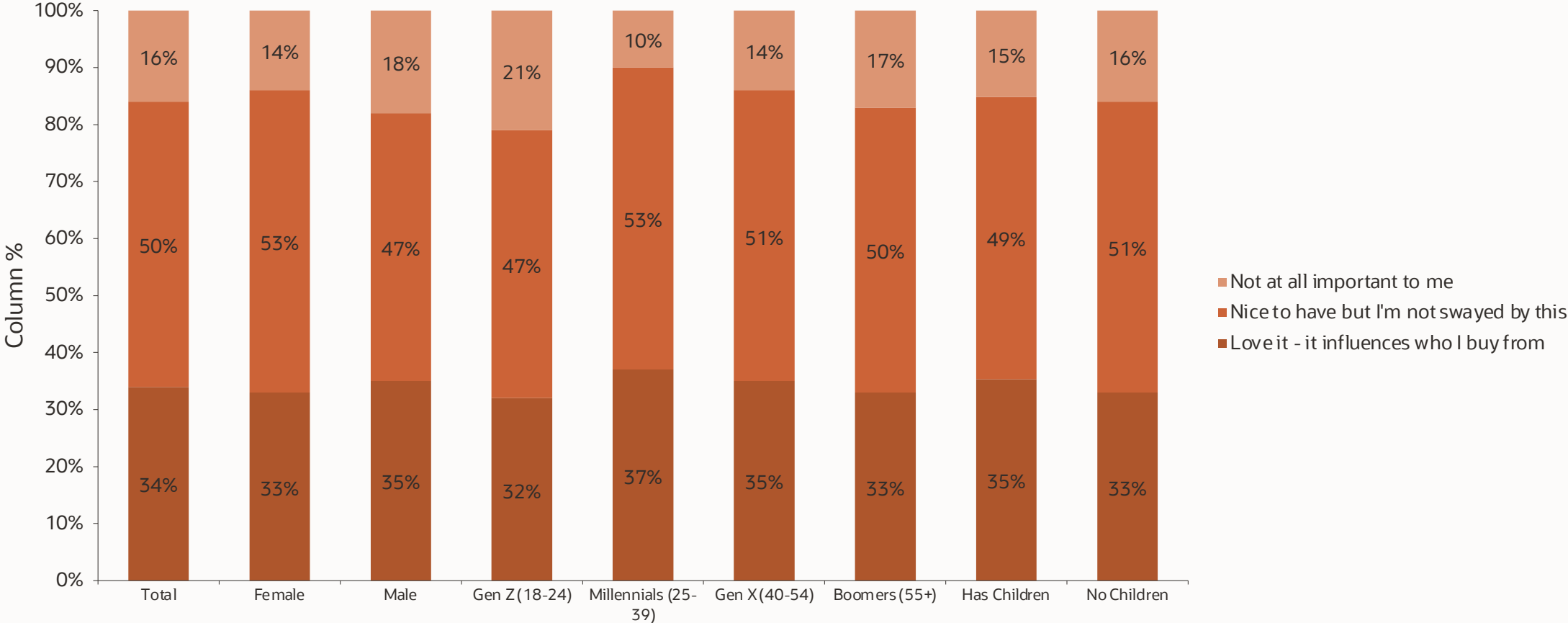
Biodegradable or recyclable food packaging influence on consumer buying decisions

Legend:
- Not at all important to me
- Nice to have but I'm not swayed by this
- Love it - it influences who I buy from

Category	Not at all important to me	Nice to have but I'm not swayed by this	Love it - it influences who I buy from
Total	12%	47%	41%
Female	11%	47%	42%
Male	14%	48%	38%
Gen Z (18-24)	18%	40%	43%
Millennials (25-39)	11%	46%	42%
Gen X (40-54)	9%	55%	36%
Boomers (55+)	11%	48%	40%
Has Children	13%	45%	42%
No Children	12%	49%	40%

Column %

Sample Size = 528   Source: Untold Insights

Respondents Included = 9%, Filter Applied, (Country Profiling = UK)

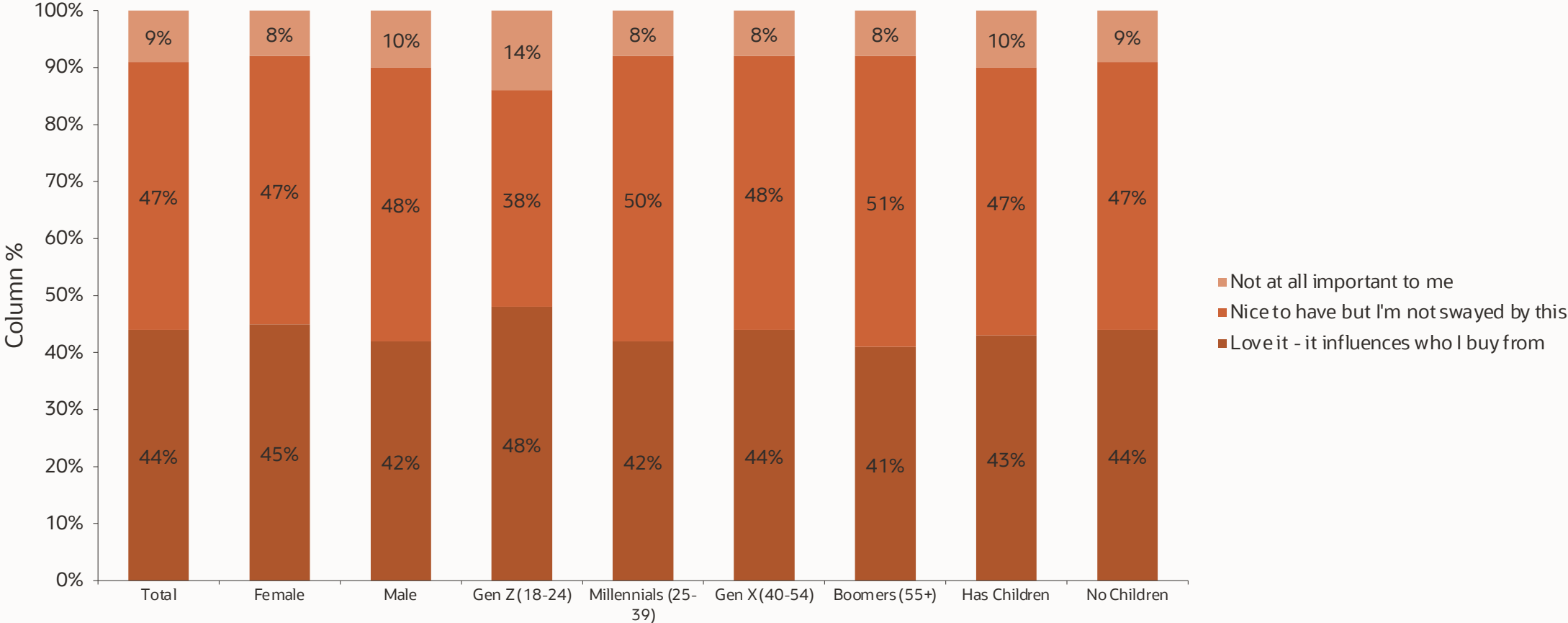# Low or zero emission takeout delivery services influence on consumer buying decisions

Column %

	Total	Female	Male	Gen Z (18-24)	Millennials (25-39)	Gen X (40-54)	Boomers (55+)	Has Children	No Children
Not at all important to me	16%	14%	18%	21%	10%	14%	17%	15%	16%
Nice to have but I'm not swayed by this	50%	53%	47%	47%	53%	51%	50%	49%	51%
Love it - it influences who I buy from	34%	33%	35%	32%	37%	35%	33%	35%	33%

■ Not at all important to me
■ Nice to have but I'm not swayed by this
■ Love it - it influences who I buy from

Efforts to lower food waste influence on consumer buying decisions

Legend:
- Not at all important to me
- Nice to have but I'm not swayed by this
- Love it - it influences who I buy from

Y-axis: Column %

	Total	Female	Male	Gen Z (18-24)	Millennials (25-39)	Gen X (40-54)	Boomers (55+)	Has Children	No Children
Not at all important to me	9%	8%	10%	14%	8%	8%	8%	10%	9%
Nice to have but I'm not swayed by this	47%	47%	48%	38%	50%	48%	51%	47%	47%
Love it - it influences who I buy from	44%	45%	42%	48%	42%	44%	41%	43%	44%

Sample Size = 528   Source: Untold Insights

Respondents Included = 9%, Filter Applied, (Country Profiling = UK)

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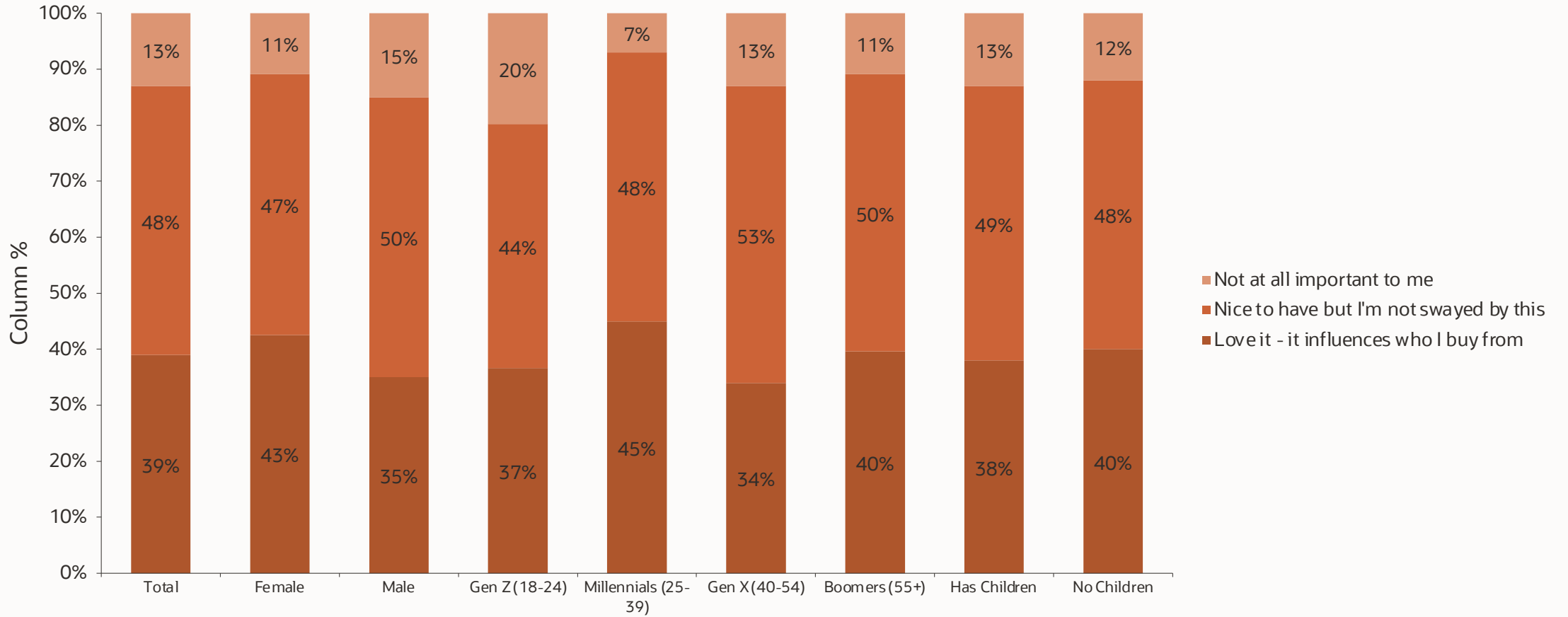
Column %

Legend:
- Not at all important to me
- Nice to have but I'm not swayed by this
- Love it - it influences who I buy from

Category	Not at all important to me	Nice to have but I'm not swayed by this	Love it - it influences who I buy from
Total	13%	48%	39%
Female	11%	47%	43%
Male	15%	50%	35%
Gen Z (18-24)	20%	44%	37%
Millennials (25-39)	7%	48%	45%
Gen X (40-54)	13%	53%	34%
Boomers (55+)	11%	50%	40%
Has Children	13%	49%	38%
No Children	12%	48%	40%

Sample Size = 528   Source: Untold Insights

Respondents Included = 9%, Filter Applied, (Country Profiling = UK)

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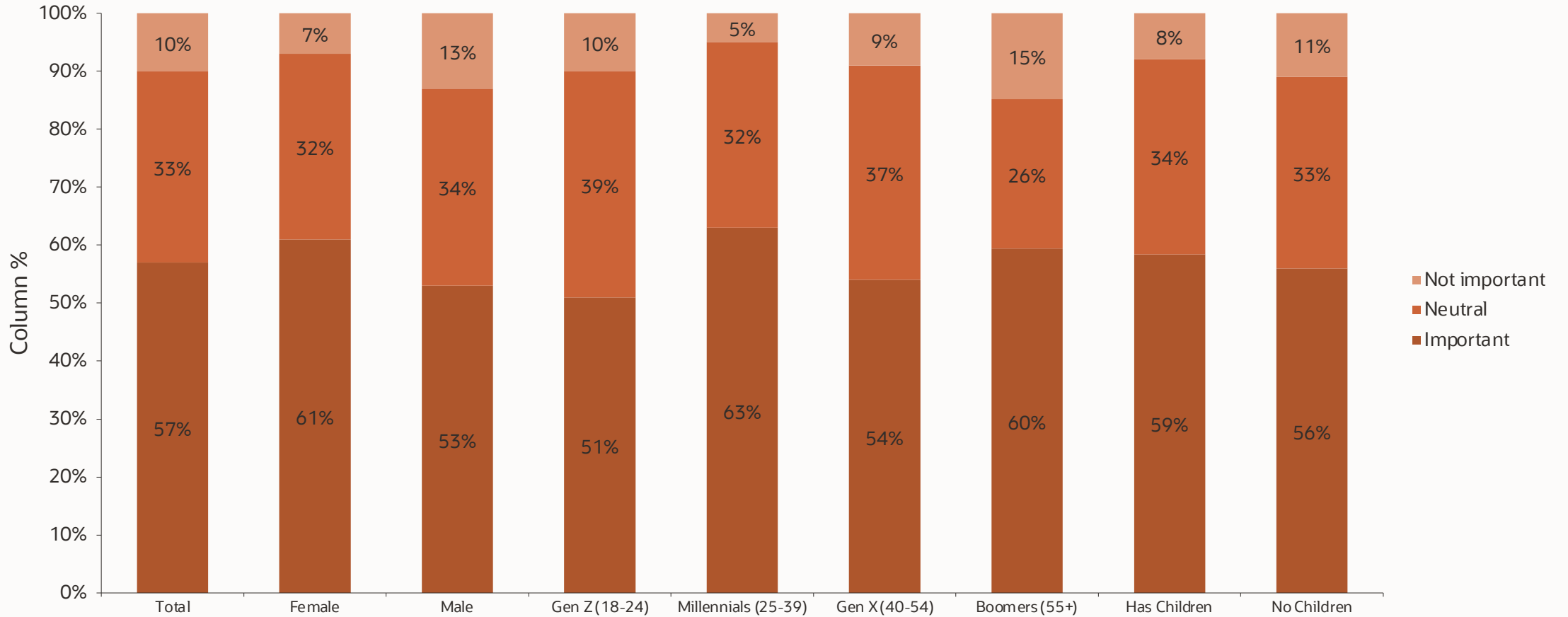
Column %

Category	Not important	Neutral	Important
Total	10%	33%	57%
Female	7%	32%	61%
Male	13%	34%	53%
Gen Z (18-24)	10%	39%	51%
Millennials (25-39)	5%	32%	63%
Gen X (40-54)	9%	37%	54%
Boomers (55+)	15%	26%	60%
Has Children	8%	34%	59%
No Children	11%	33%	56%

Sample Size = 528   Source: Untold Insights

Respondents Included = 9%, Filter Applied, (Country Profiling = UK)

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

Request a call back