

# The Current State of the Digital Experience

AS REPORTED BY ENTERPRISE RESTAURANT OPERATORS\*

\* Enterprise defined as brands with over 20 locations.

## TOP DIGITAL & OMNI-CHANNEL PRIORITIES IN 2020

**75% of enterprise operators ranked Online Ordering as their top digital priority in 2020.**

The high importance and focus on online ordering signifies that, while not a new channel, enterprise operators have not been able to optimize its performance. Solidifying this foundational functionality is job #1 for better multi-channel management in 2020.



- Top 3 Reasons Cited for Prioritizing these Channels**
- 23% To increase sales and revenues
  - 21% To adapt to changing guest preferences
  - 14% To accommodate industry increase in off-peak sales

**Average Number of Menus Managed**

# 6

50% of operators are managing 6 or more different menus across channels.  
34% are managing 2-3 menus  
25% are managing more than 10 menus!

Many operators call this "Menu Mayhem"

For restaurants managing 4 or more menus; top reasons to consider a new POS are:



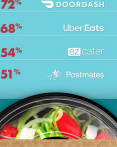
## Average Number of Delivery Partners

# 4

Q5's on average use fewer third-party delivery partners than Fast Casual Restaurants

Every restaurant surveyed is using at least one third-party delivery provider; with an average of 4 and max of 8 used.

There is a direct correlation between the number of menus and delivery partners. More delivery partners means more menus being managed.



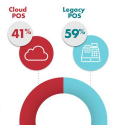
## Average Number of Middlewares Used

# 2

On average, enterprise operators are using two middleware aggregators. Operators managing 10+ menus have up to 4 middleware solutions.

## Average Number of POS Systems Used

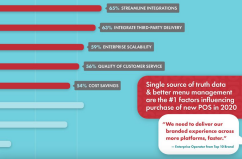
# 3



54 enterprise brands use over 22 different POS systems.

Signals high dissension in the POS industry. There is no clear leader or winner yet.

## The top factors influencing Operators' decision to purchase a new POS



Single source of truth data & better menu management are the #1 factors influencing purchase of new POS in 2020

"We need to deliver our branded experience across more platforms, faster."

## How are POS vendors performing?

(Average Grade = "C" or "Fair")  
Not a strong vote of confidence.



**3★ Average Rating**  
★★★★☆

88% of dissatisfied respondents (poor or very poor) are most frustrated with their POS' inability to integrate with third-party delivery and lack of scalability.

## Who Participated?

65 respondents from 54 enterprise restaurant brands. Participating brands have an average of 673 locations. Represents 15% of the total Enterprise Restaurant Market



## Input into purchasing decision by role:

