

ARE YOU GAMBLING ON YOUR CUSTOMERS?



The 2020 Food on Demand Study reveals who's running the table in off-premise delivery and strategies for your brand to hit the jackpot.

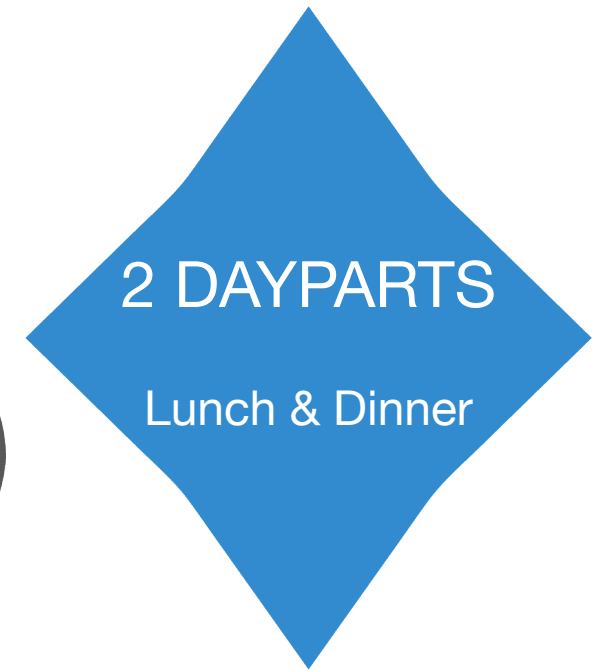
See
Level
Human Experience SM

INTRODUCTIONS + METHODOLOGY

♠ [Nicholas Upton](#), Restaurants Editor, Franchise Times

♠ [Donna Goodwin](#), Chief Operations Office & Partner, SeeLevel HX

♠ [Kal Kuchimanchi](#), Director of Operations for US/Can, UberEats



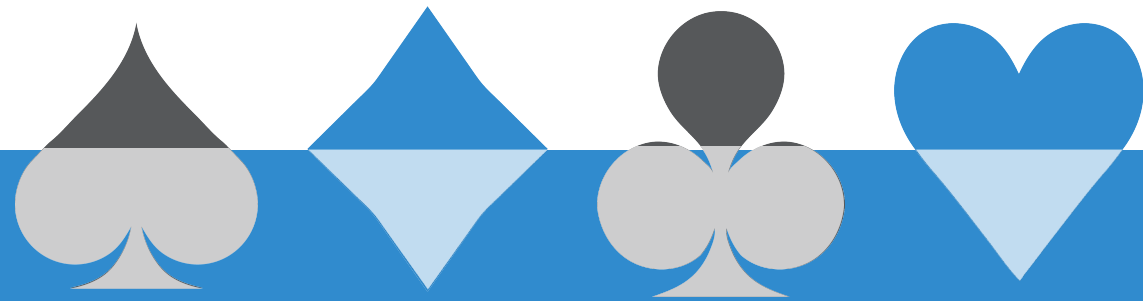
WHAT'S IN THE CARDS?

♠ Table of Contents



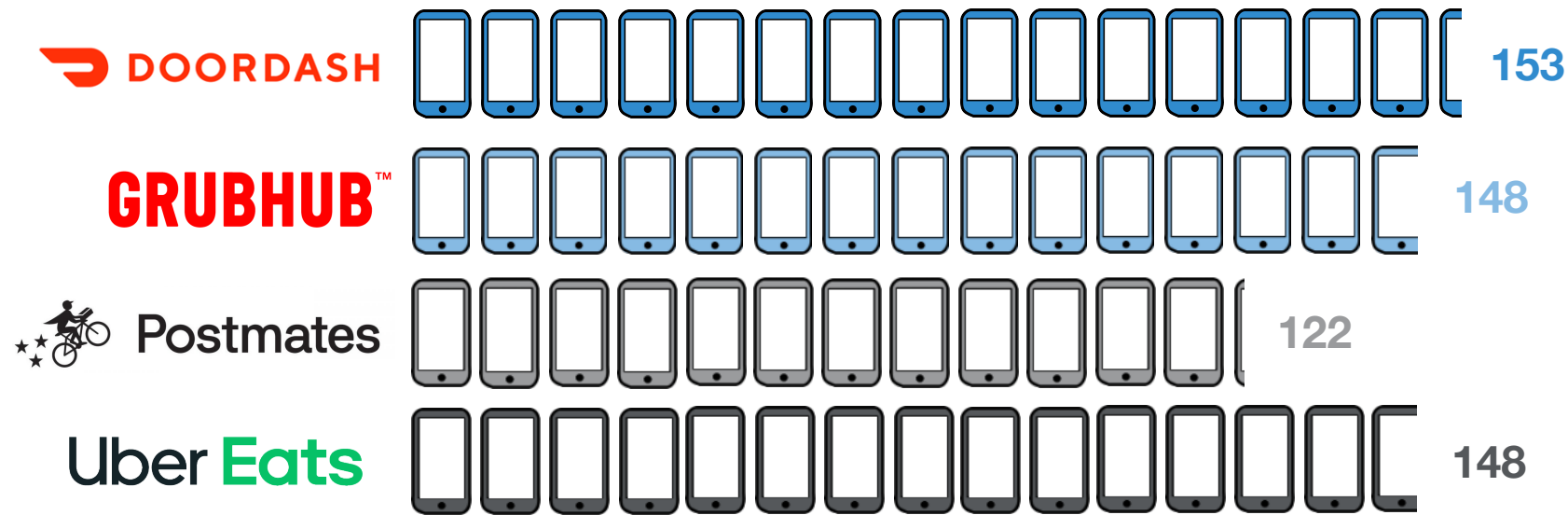
User eXperience + POPULARITY

Who's running the table in third-party delivery
mobile app user experience and popularity?



PLAYING THE PERCENTAGES - APP MENTIONS

♠ Restaurants told us that they partner with DoorDash slightly more frequently.



 = 10 mentions

**There were also 55 mentions of other delivery apps*

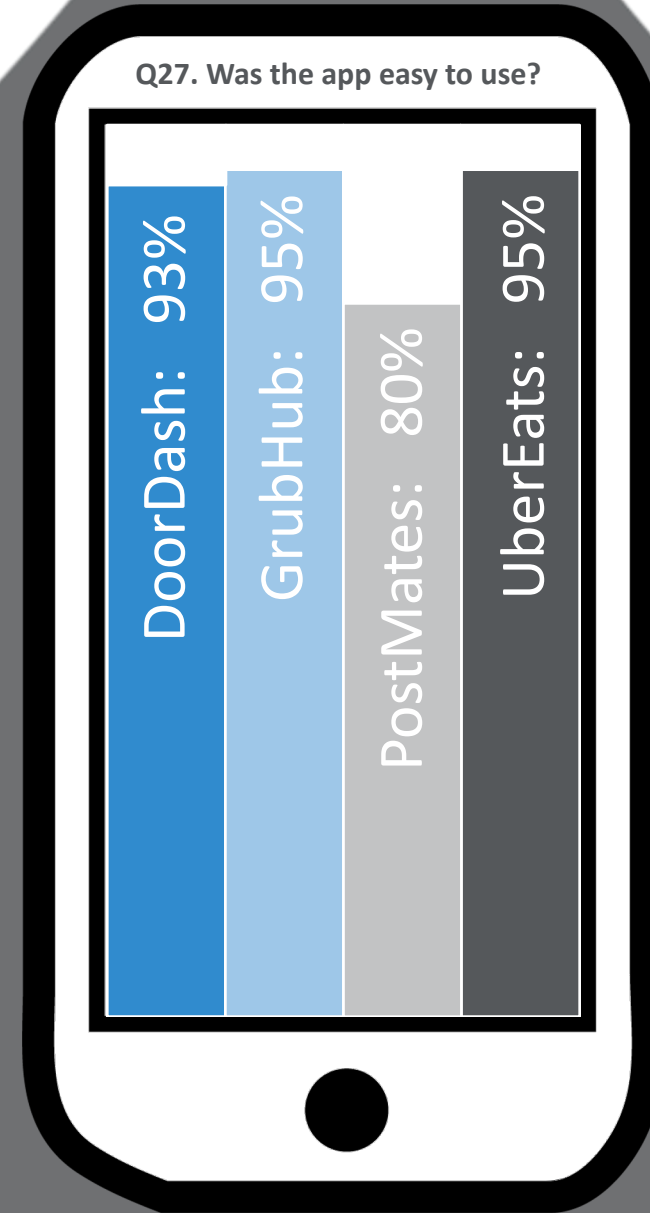
Q: Call the restaurant and ask, "What delivery food apps am I able to use to get your food delivered?"

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How can brands up the ante and receive more mentions?

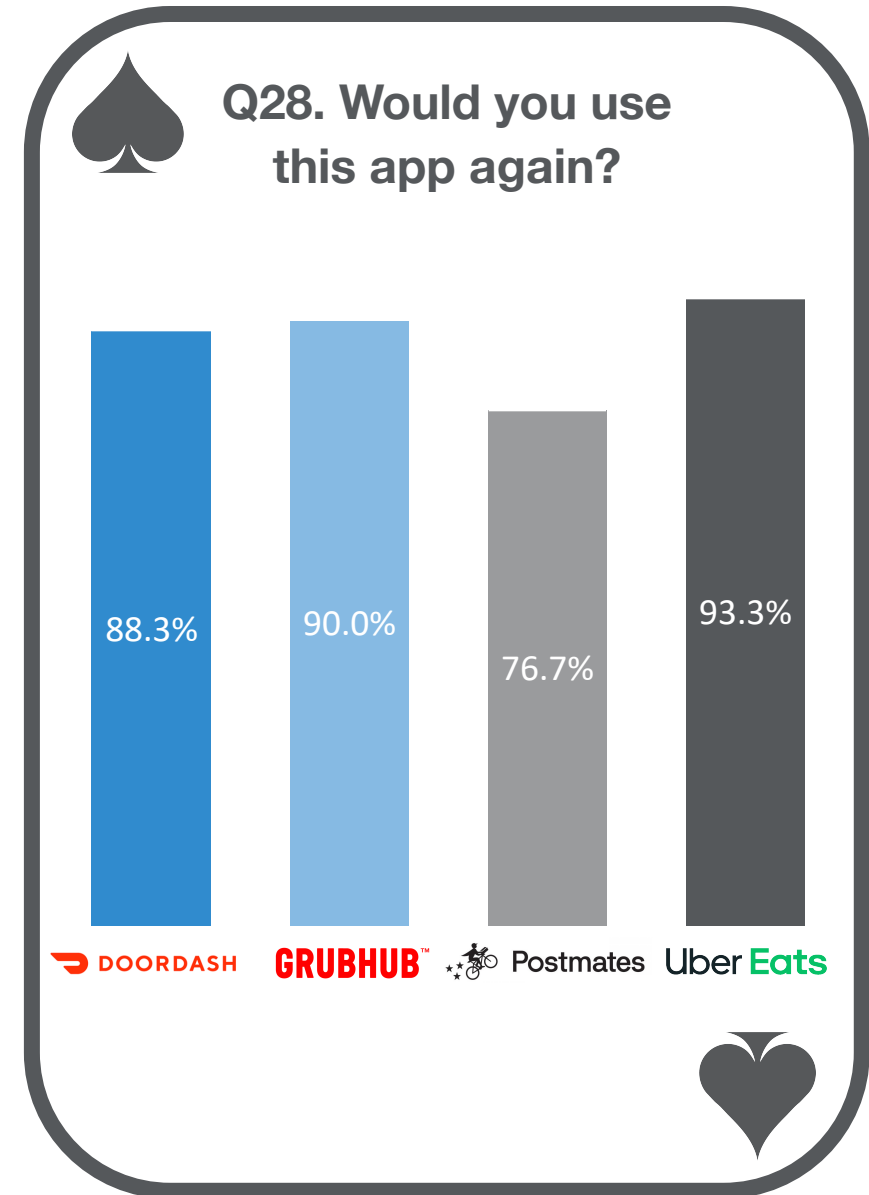
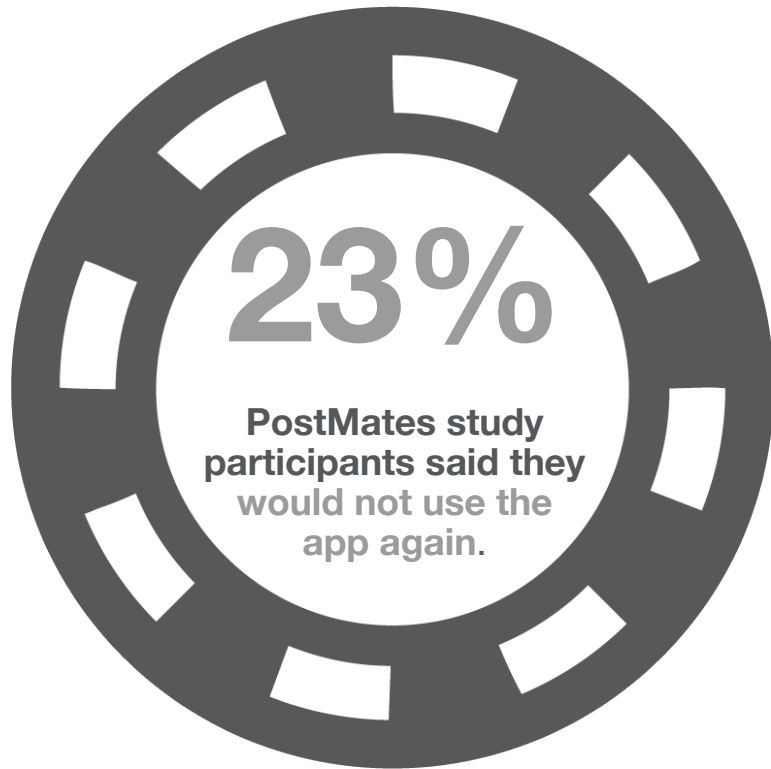
APP USABILITY SHOWDOWN

- ♠ Customer expectations change as often as the odds, so each brand's technology and UX should as well.



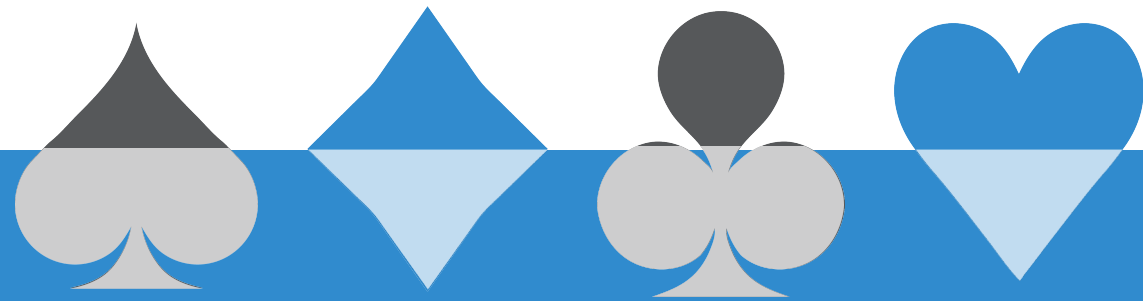
UX SHOULDN'T BE A LUCK OF THE DRAW

♠ What is your brand doing to ensure an excellent user experience with each transaction?



GETTING THE TIMING RIGHT

What cards are they really holding
when it comes to delivery times?



20-39 MINUTE ROYAL FLUSH

- ♠ Among all four companies, the timing sweet spot rested in the 20-39-minute delivery range. Below are the summarized results. For the full customer journeys, view the following four slides.



Strengths

Does a great job aligning 20-39-minute ETAs with actual delivery times.

...

Weaknesses

Quick overall to give the 20-39-minute ETA window, but actual times overall drop.



Strengths

Offers the most accurate ETA when customers choose a restaurant

...

Weaknesses

When an order is placed, they become too confident with their ETAs



Strengths

Underselling themselves; there are many more actual delivery times in the 20-39-minute range than ETAs offered.

...

Weaknesses

Offers slower delivery times in general compared to the other three



Strengths

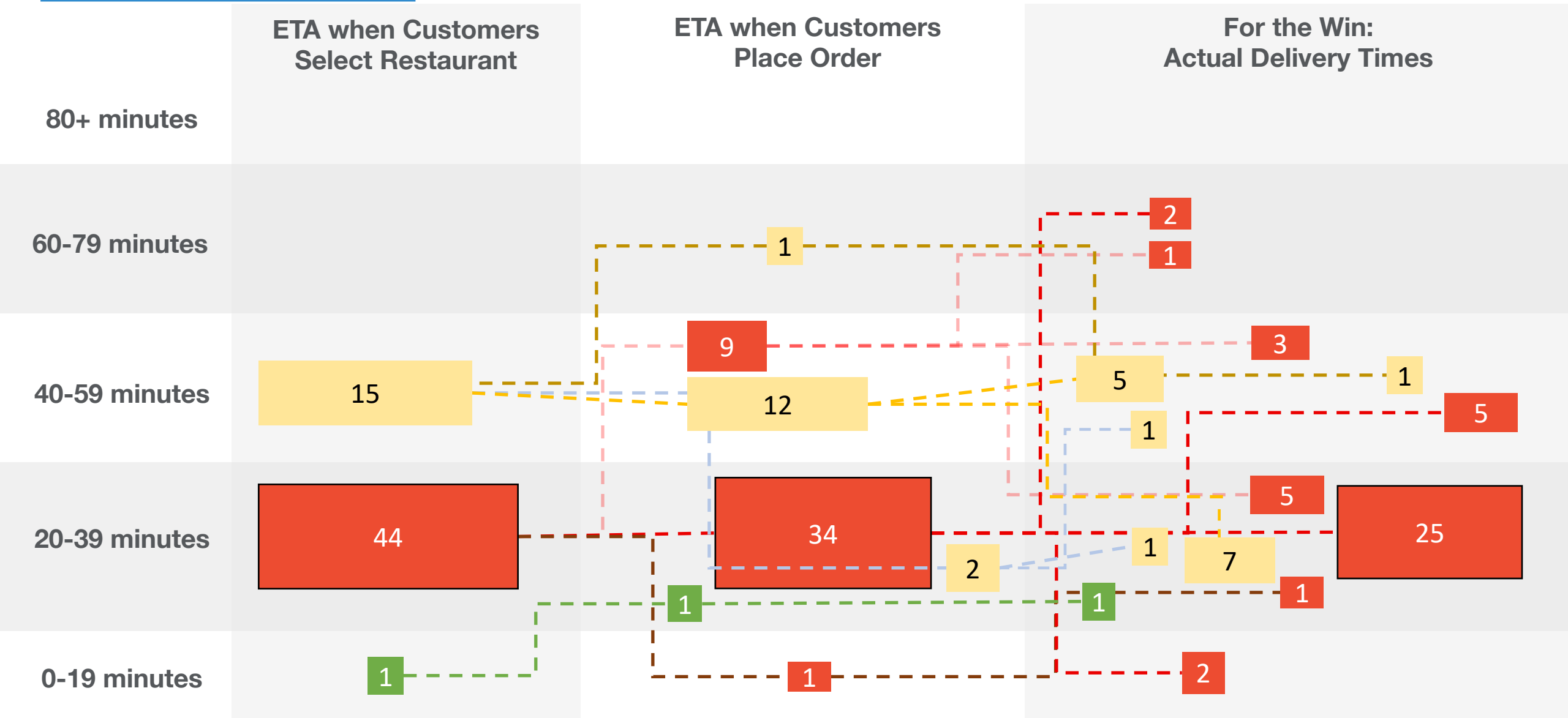
Does a great job aligning 20-39-minute ETAs with actual delivery times.

...

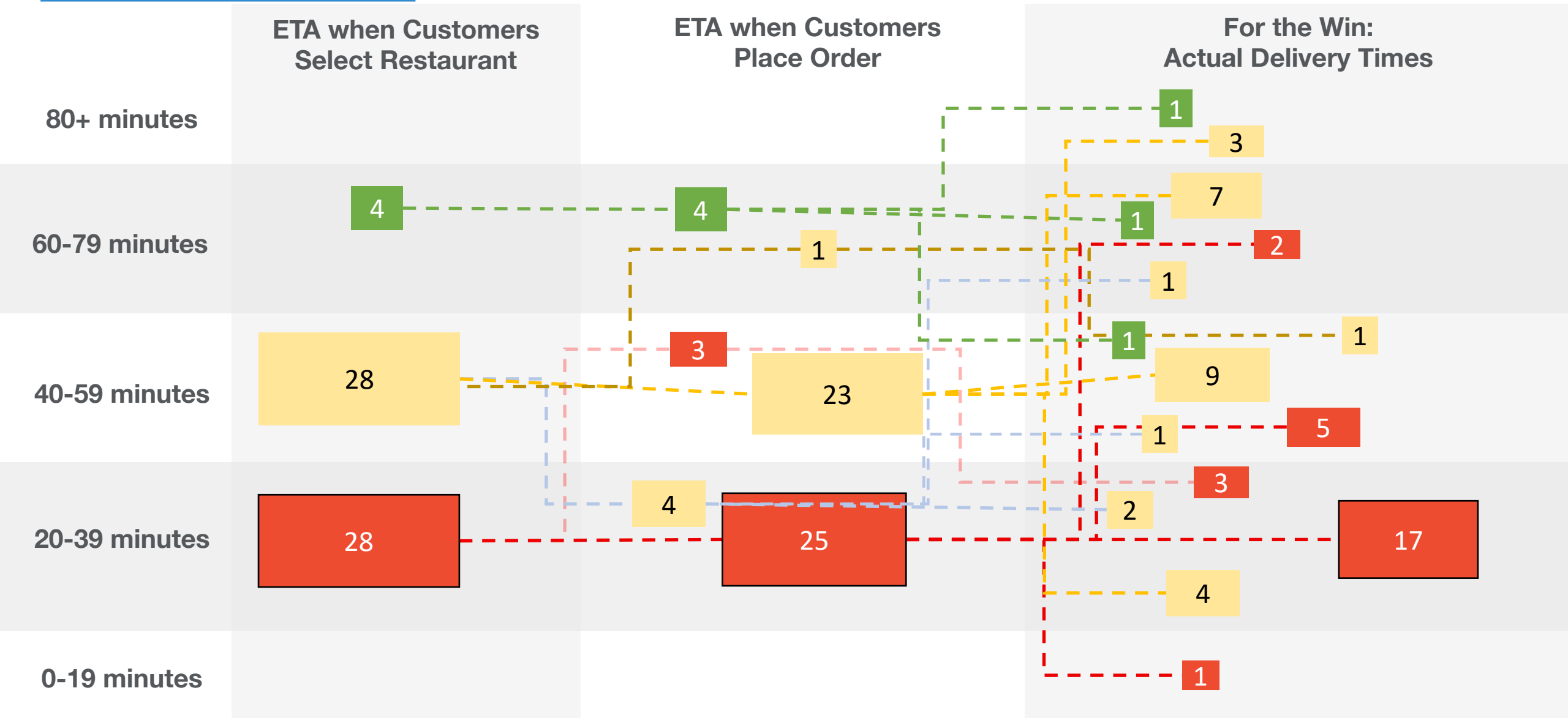
Weaknesses

Quick overall to give the 20-39-minute ETA window, but actual times overall drop.

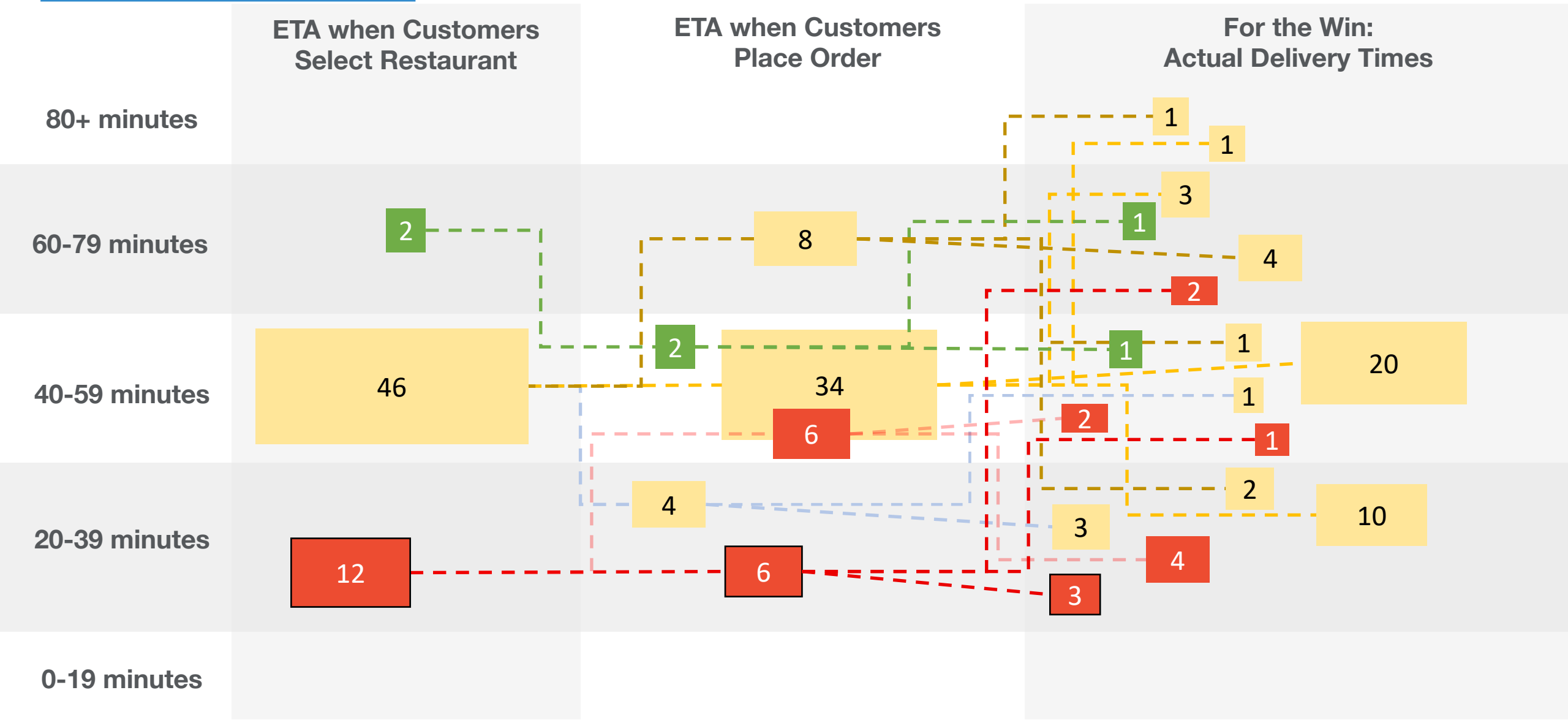
CUSTOMER JOURNEY TIMES FOR DOORDASH



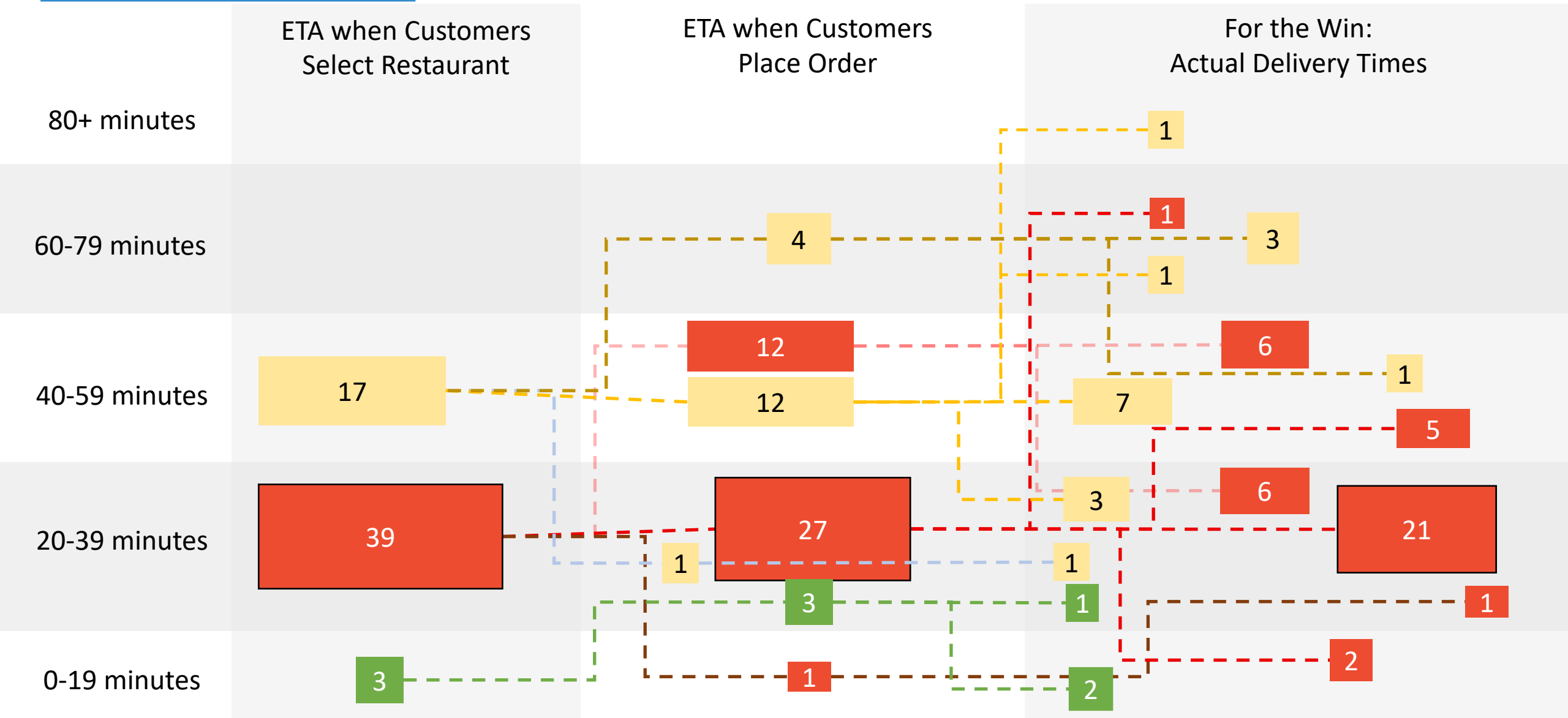
CUSTOMER JOURNEY TIMES FOR GRUBHUB



CUSTOMER JOURNEY TIMES FOR POSTMATES



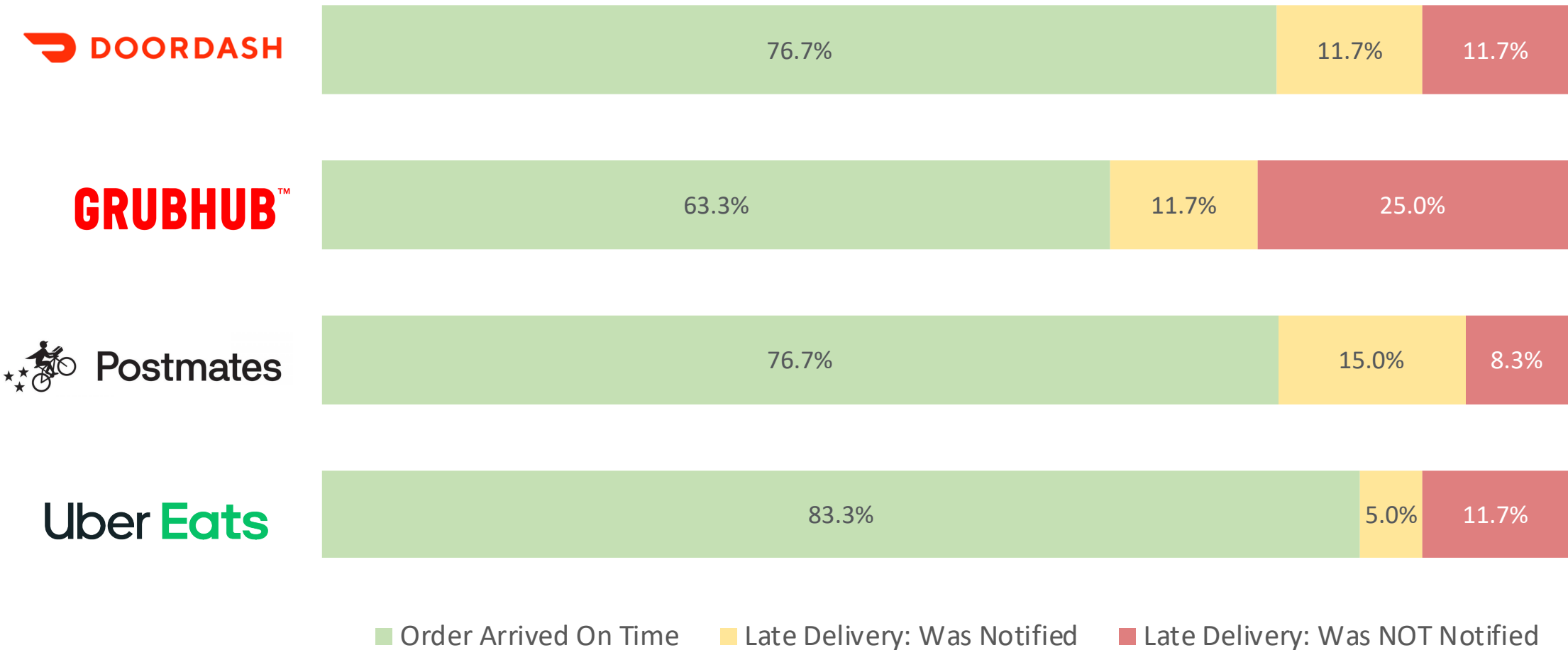
CUSTOMER JOURNEY TIMES FOR **UBEREATS**



BOUNCING BACK FROM A BAD HAND

♥ Notifying customers about late deliveries can be helpful. But is it enough to keep customers loyal to your brand?

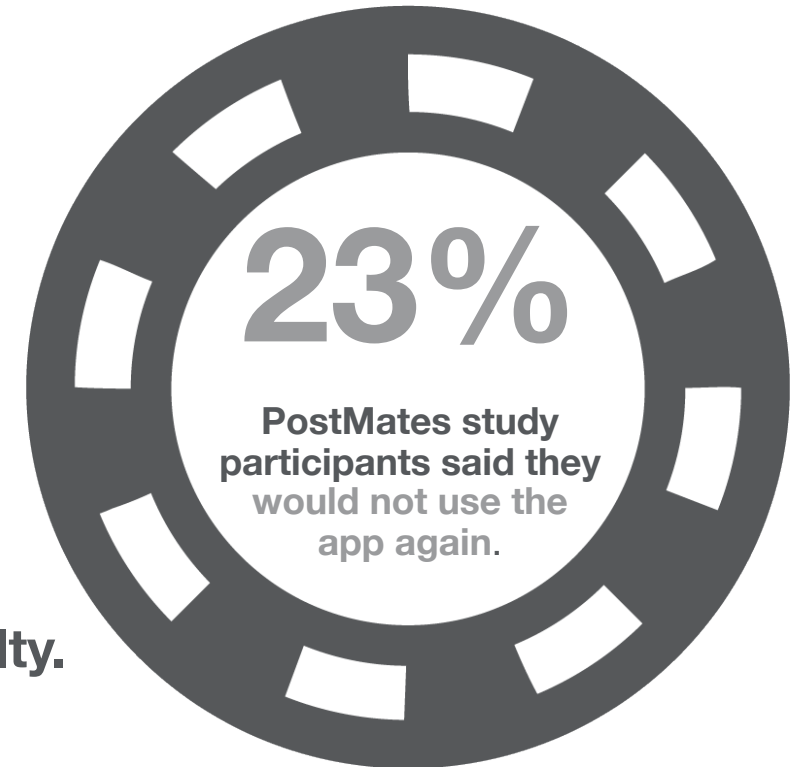
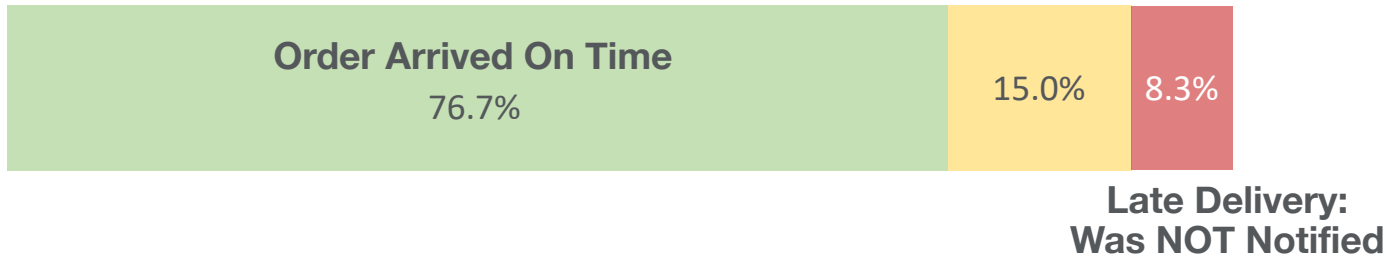
Q6. If your meal was late/delayed, were you notified?



BUT DON'T GO ALL IN JUST YET...

♥ While Postmates did well to deliver on time and notify customers if they were going to be late, they still ranked the lowest on whether study participants would use the app again.

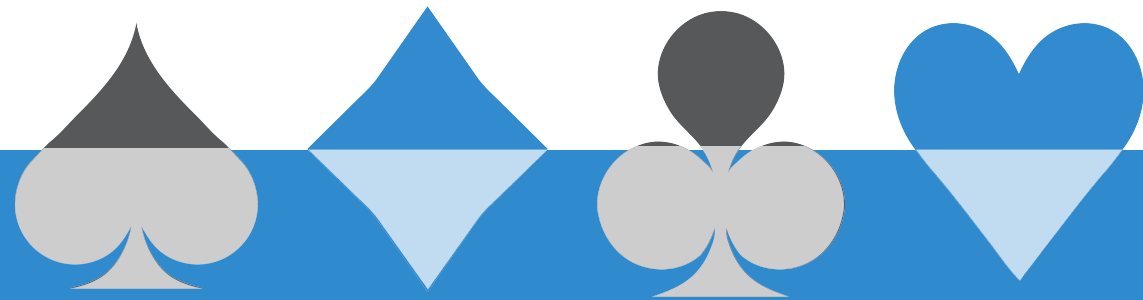
Q6. If your meal was late/delayed, were you notified?



♥ It appears you must play your cards right across many categories of third-party delivery to maintain customer loyalty.

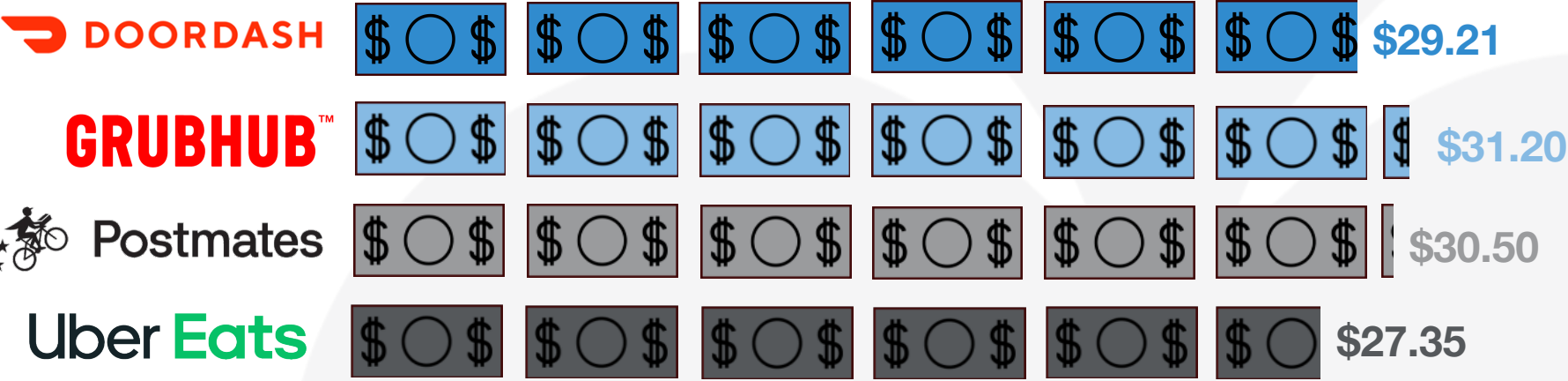
DON'T JUST ROLL THE DICE

To be in the game you must
deliver on some key table stakes.

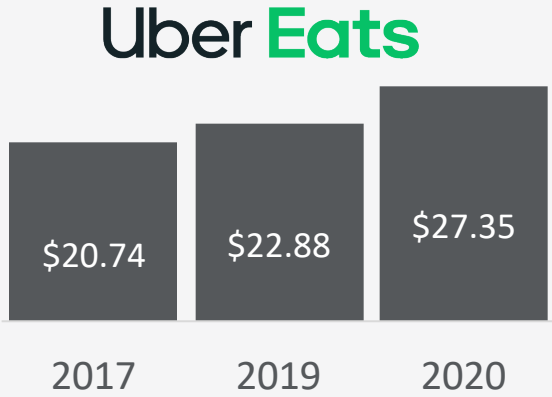
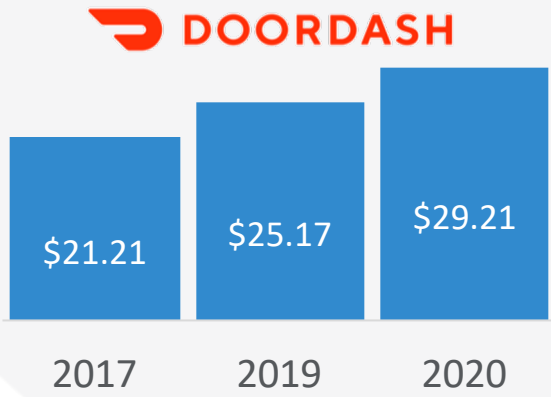


F.O.D. COSTS - TO DOUBLE DOWN OR HOLD?

♣ Consumers swallow the higher fees for delivery thus far and will have to continue doing so until food delivery is profitable for all stakeholders.



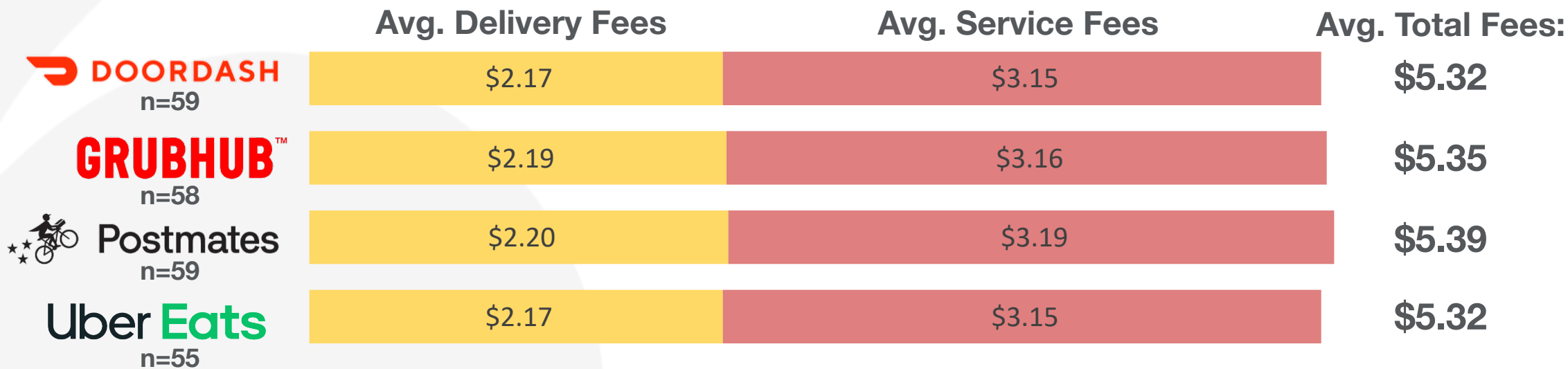
Compared to previous years:



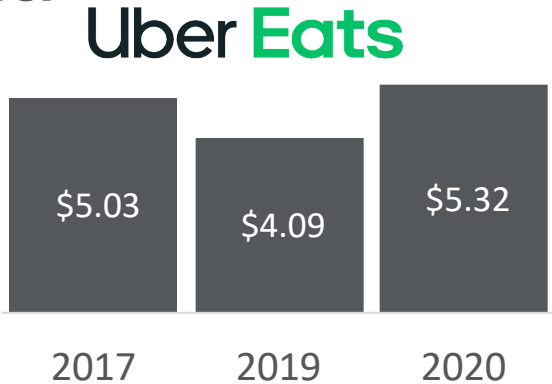
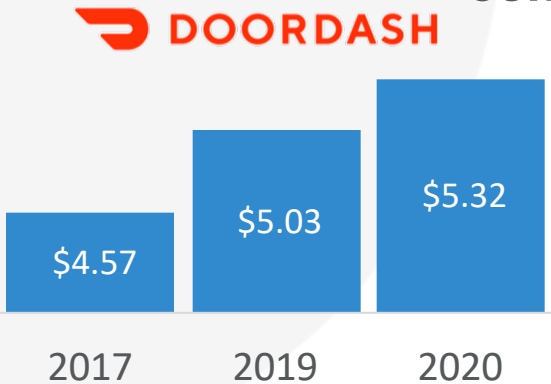
\$○\$ = \$5
Q8. Total purchase amount including delivery, fees, and tip
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DON'T LET FEES GET LOST IN THE SHUFFLE

♣ While subscription models have reduced delivery fee prevalence, service fees are not as easy to avoid and can often be hidden behind the label Taxes & Fees.



Avg. Total Fees compared to previous years:



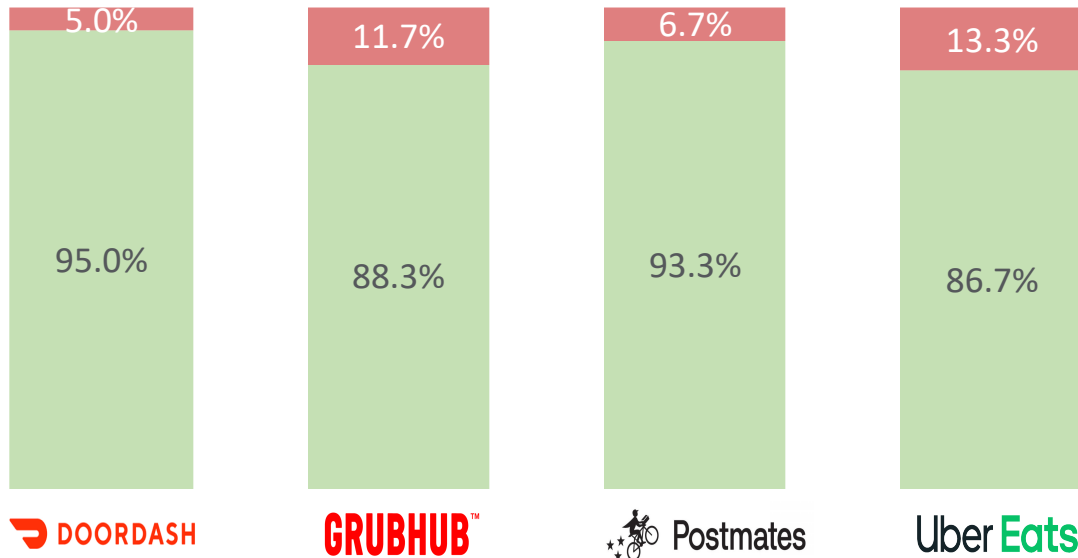
ACCURACY IS **ACE HIGH** IN THE F.O.D. GAME

♣ The average QSR loses roughly 30 seconds per inaccurate order, resulting in a loss of \$52,000 on average per location per year.

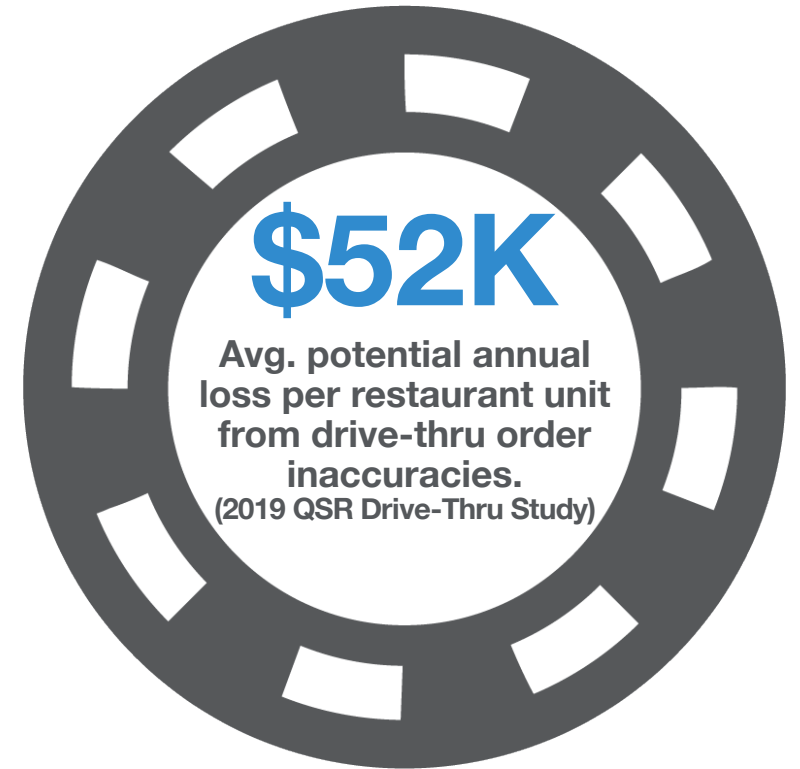
♣ Can you imagine how much money your brand is losing if an inaccurate order is delivered based on the time lost?



Q13. Was your order accurate?

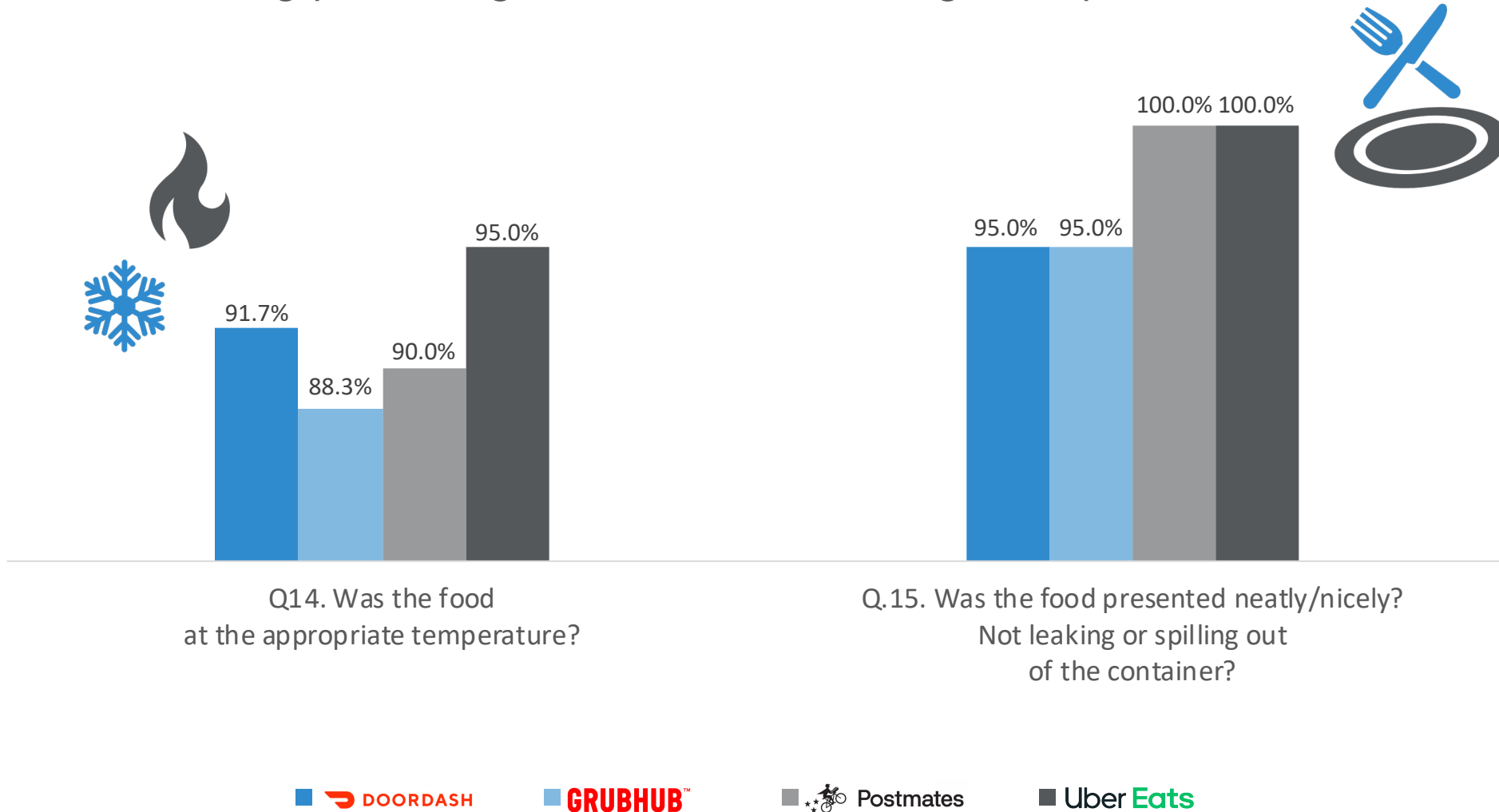


■ Yes



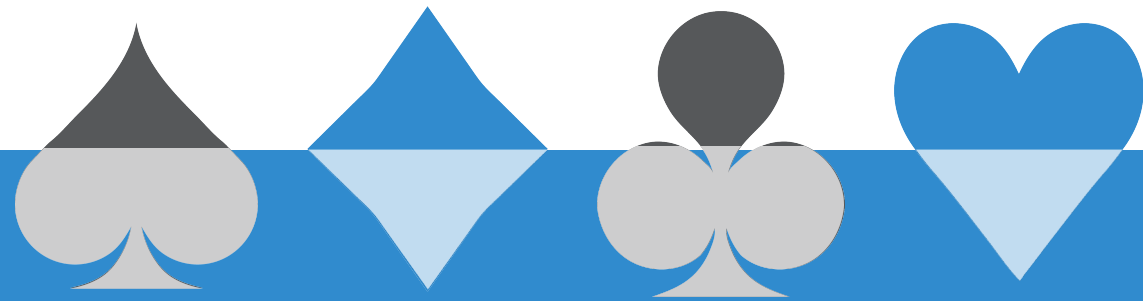
THERE'S A LOT RIDING ON THESE TABLE STAKES

- ♣ The continued increase in food delivery means brands can't miss out on delivering/presenting food well and at the right temperature.



PLACING BETS ON THE DRINKS

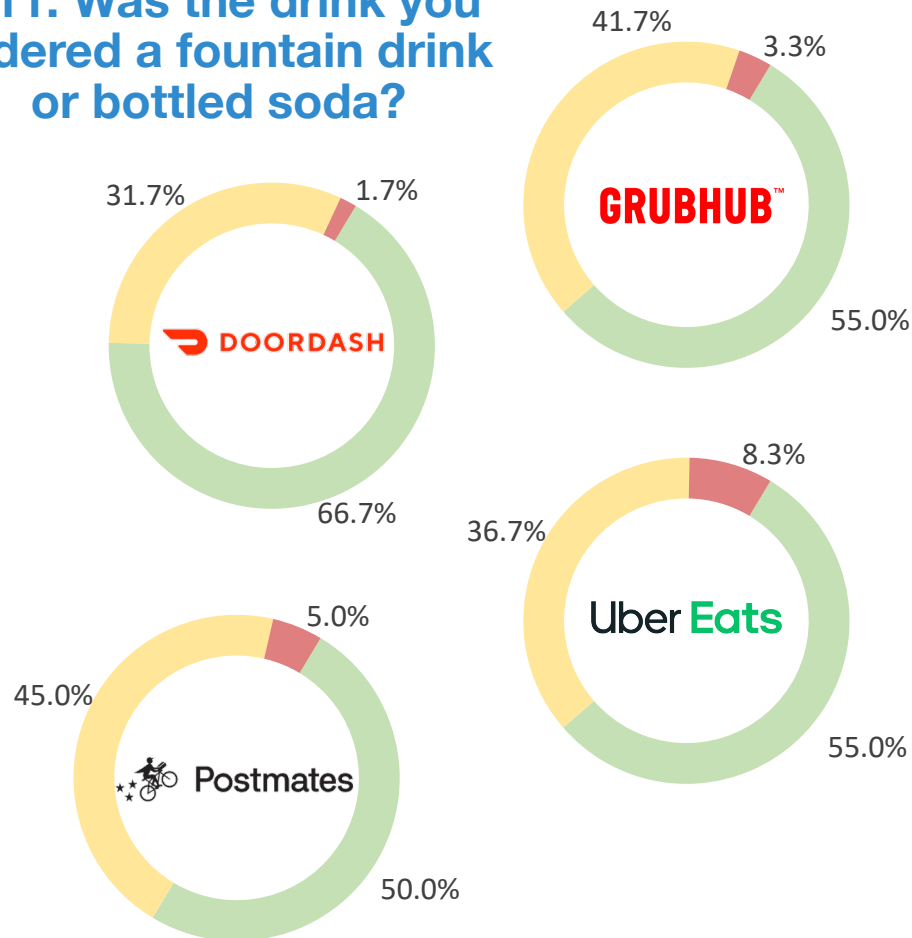
Is there a future in drink deliveries?



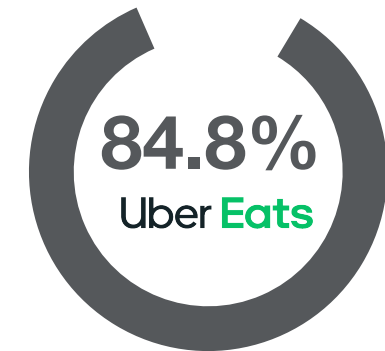
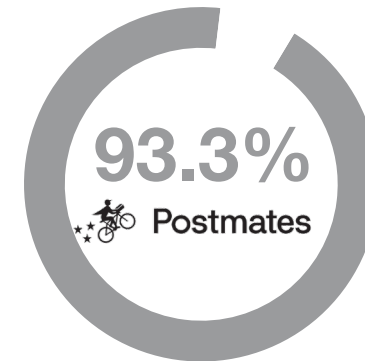
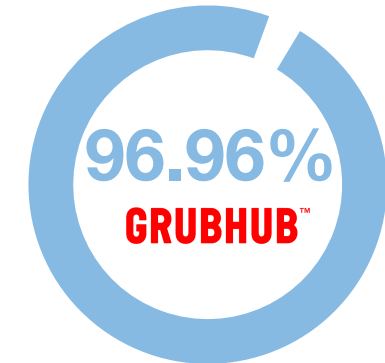
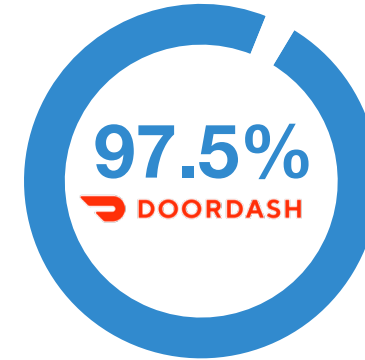
TAKING A GAMBLE ON DRINK DELIVERIES

- ◆ With an uptick in food delivery, should your brand stick to fountain drinks or make the move to bottled sodas?

Q11. Was the drink you ordered a fountain drink or bottled soda?



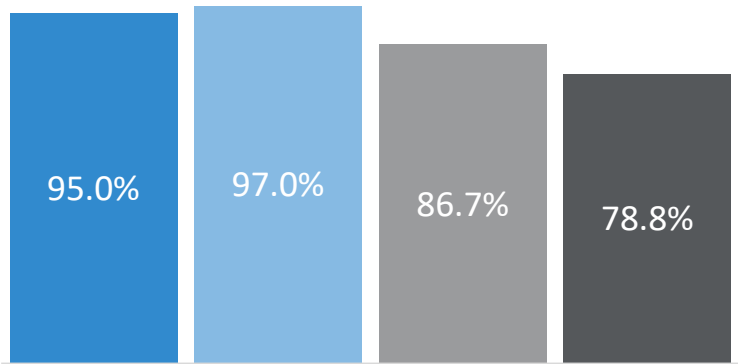
Q16. Was the drink cup in good condition?



DEALING IN THE PACKAGING

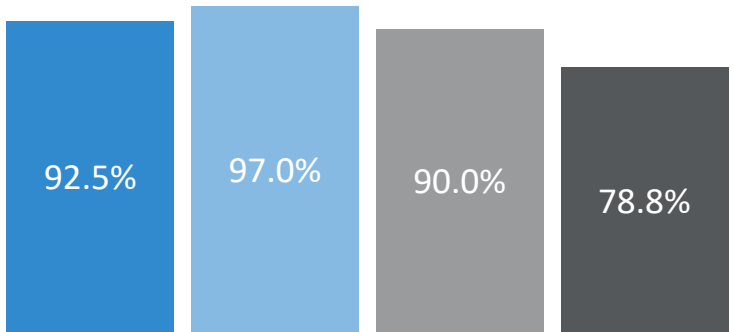
◆ The drink problem is not new and the key to solving it is in the packaging.

Q18: Did the drink taste good?



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Q19. Was the drink full strength?
(Not diluted from melted ice)

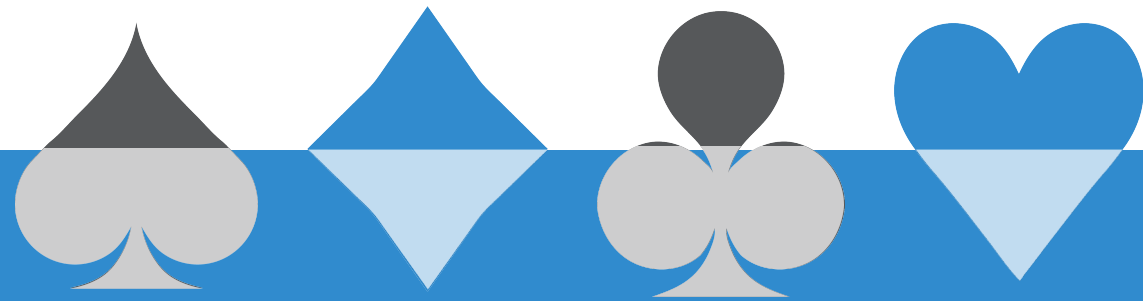


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FINDING THE WINNING DEALER

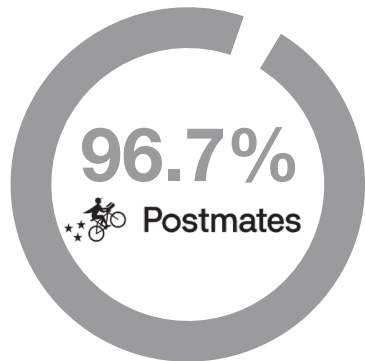
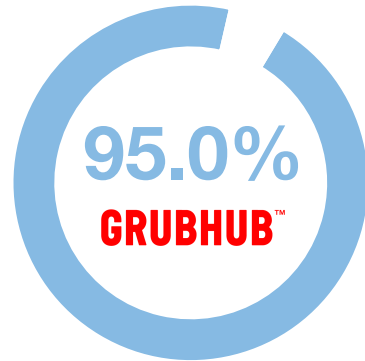
Drivers can stack the deck in your favor.
How are they representing your brand?



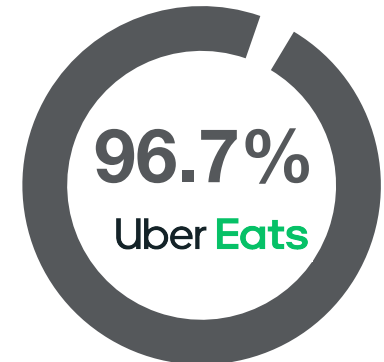
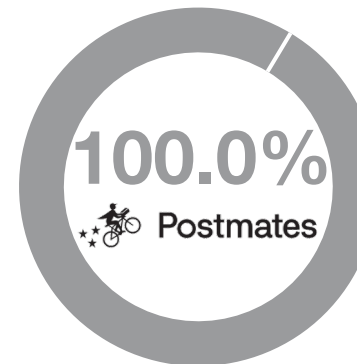
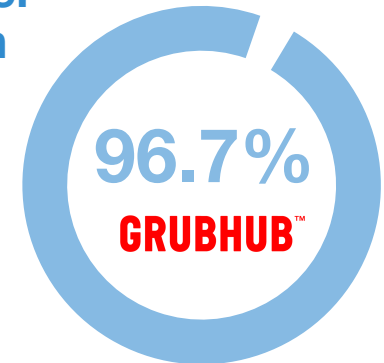
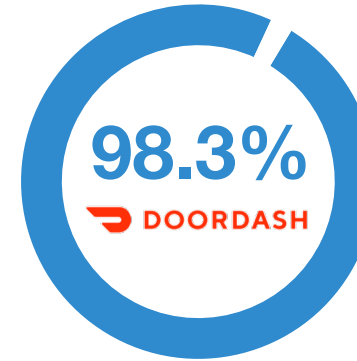
WHO'S DEALING YOUR CARDS?

- ♠ When it comes to food delivery, drivers are dealing the cards for restaurant brands. They must be at the top of their game to keep your brand thriving in the FOD space.

Q20. Was the driver friendly and polite?

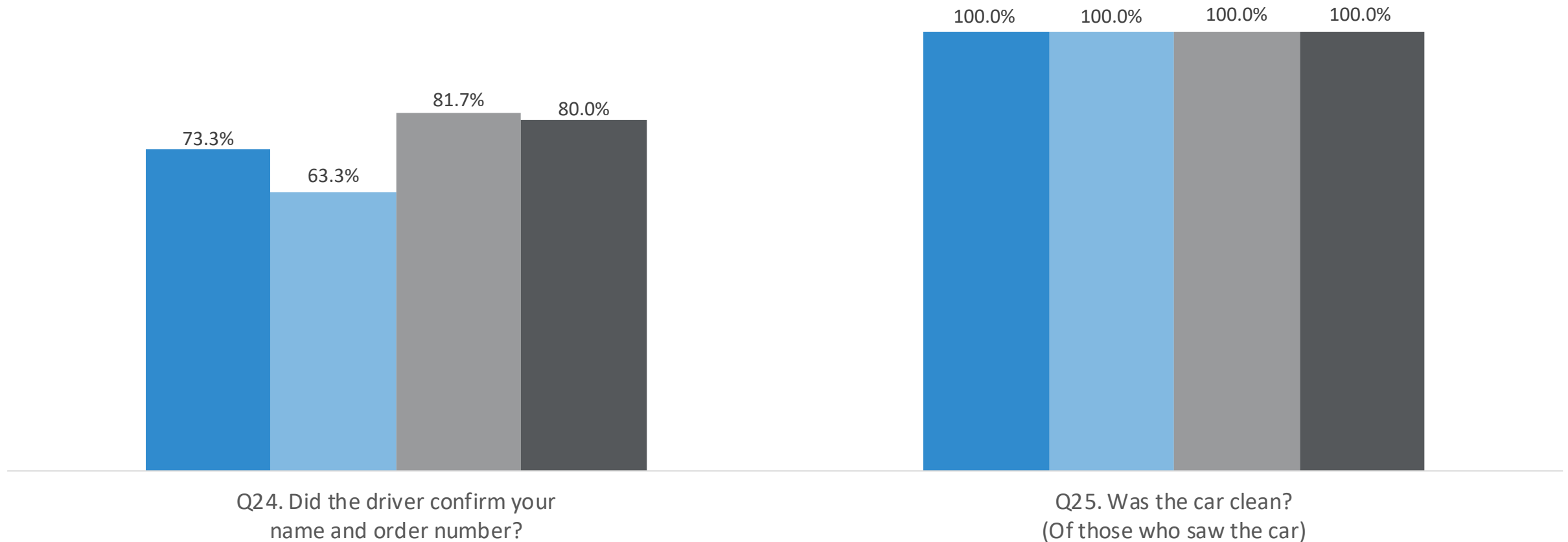


Q21. Was the driver neat and clean in appearance?



WHO'S DEALING YOUR CARDS? (CONT.)

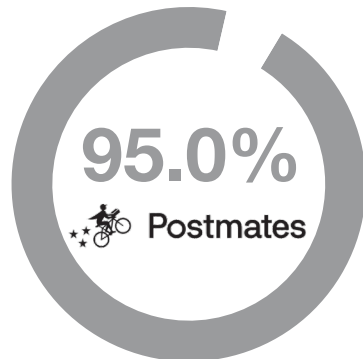
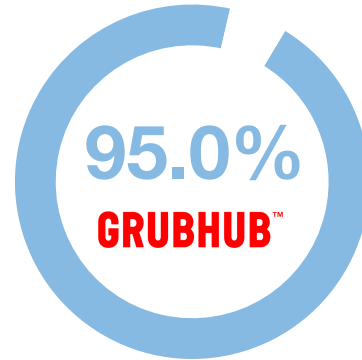
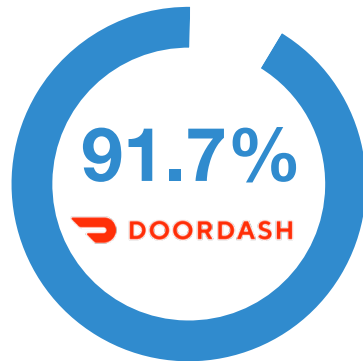
- ♠ Face cards: It's recommended to confirm information more, but car cleanliness may not be as important anymore.



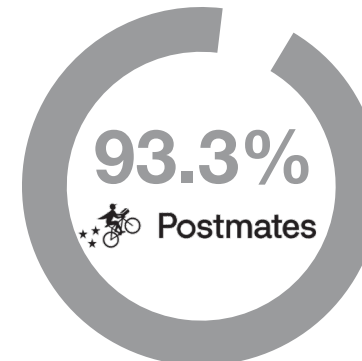
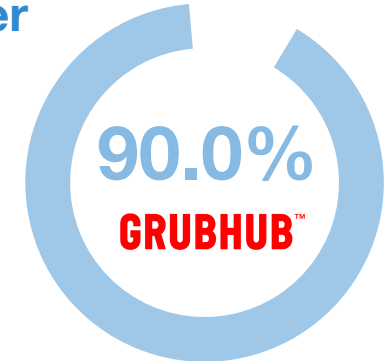
HIT THE JACKPOT WITH A PROPER GREETING

♠ Instill greetings and “thank yous” are coming up aces

Q22. Did the driver greet or acknowledge you?

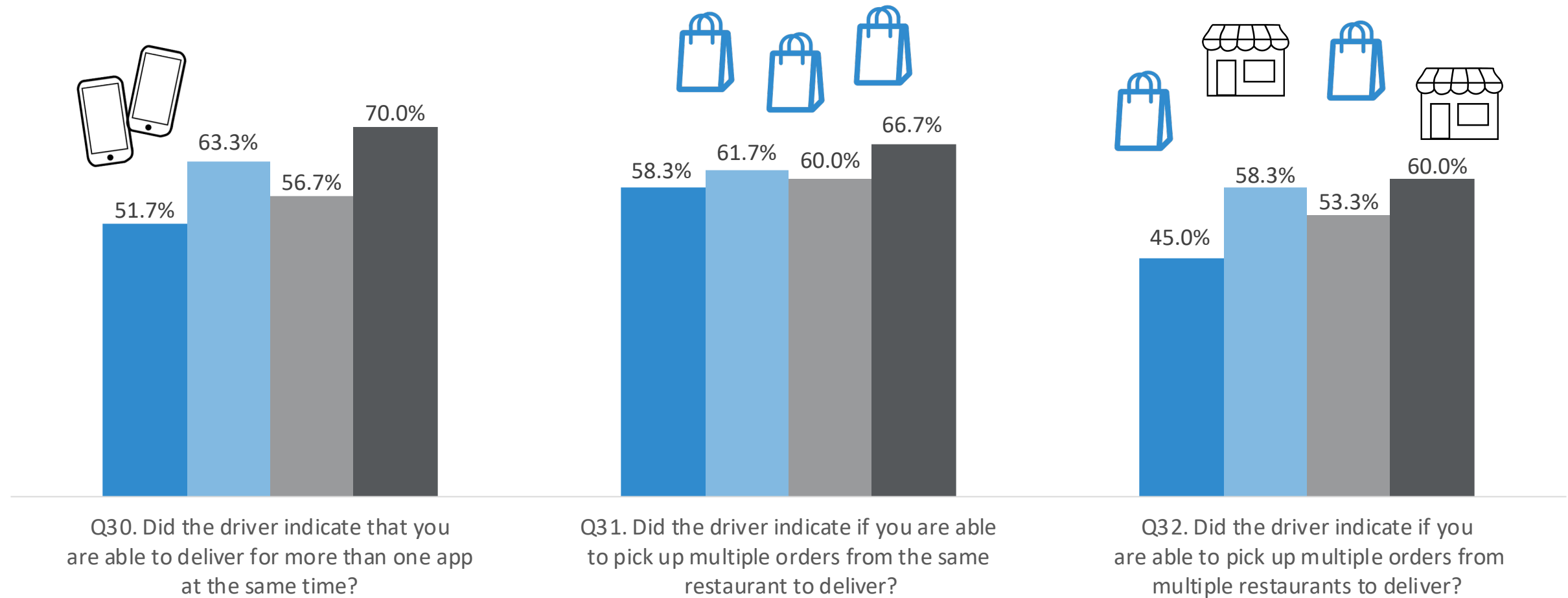


Q23. Did the driver thank you?



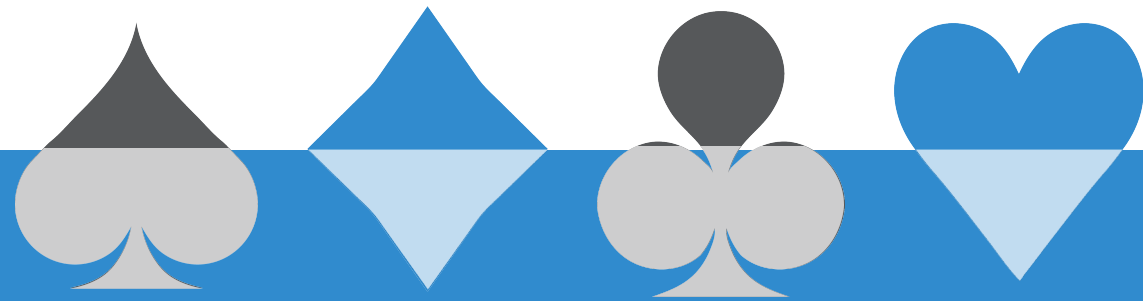
DEALING IN MULTIPLE DELIVERIES

♠ According to the drivers...



DRAWING THE COVID WILD CARD

Time to pull out the 2020 wild card
and address its impact on the FOD game.



PLAYING THE WILD CARD

♥ While it seems all 2020 bets are off thanks to COVID-19, the **table stakes in off-premise delivery remain the same.**



Speed of Service



Order Accuracy



Customer Service



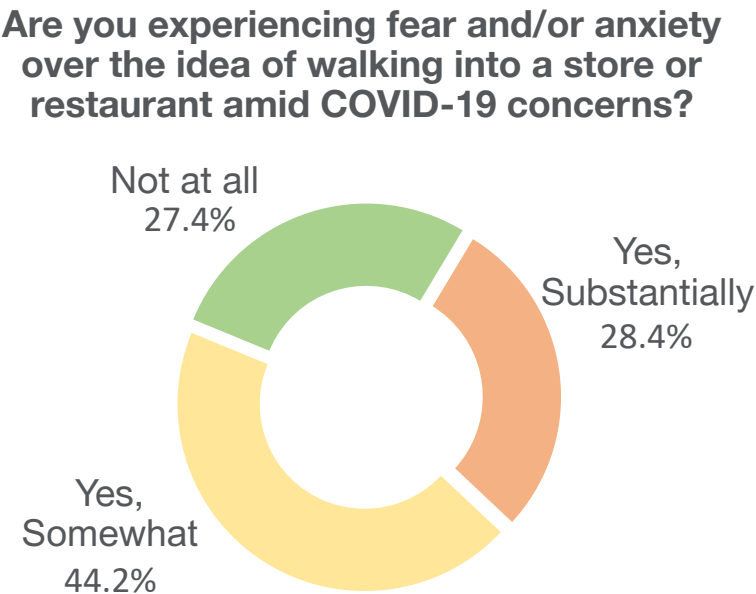
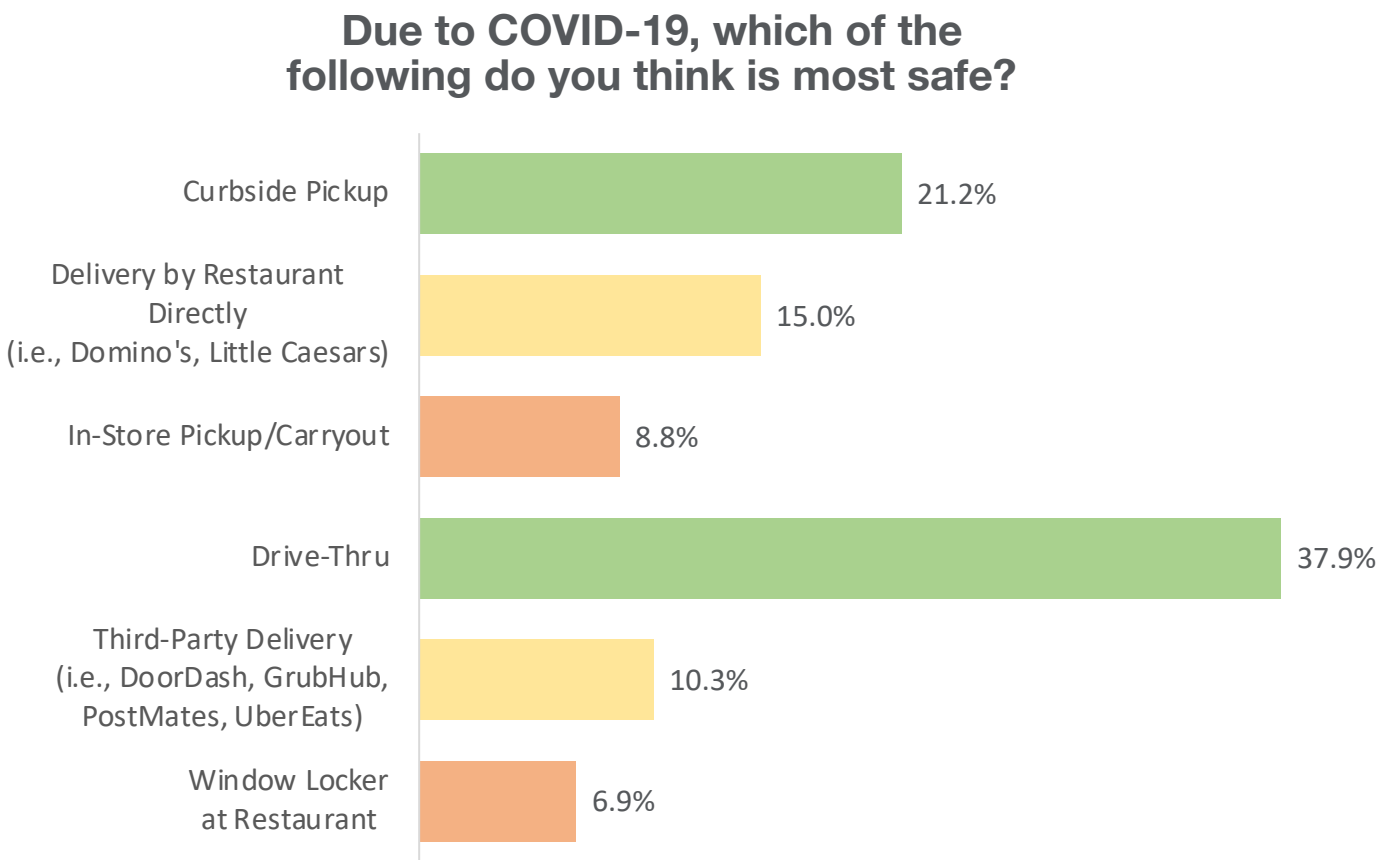
Taste



♥ The element that may look different because of COVID-19 is **how brands deliver** in these arenas.

HOW TO PLAY YOUR ACE DURING COVID-19

♥ In a separate COVID-19 related consumer study, the following results regarding shifts in customer expectations were reported.



HOW TO PLAY YOUR ACE DURING COVID-19 (CONT.)

♥ In a separate COVID-19 related consumer study, the following results regarding shifts in customer expectations were reported.



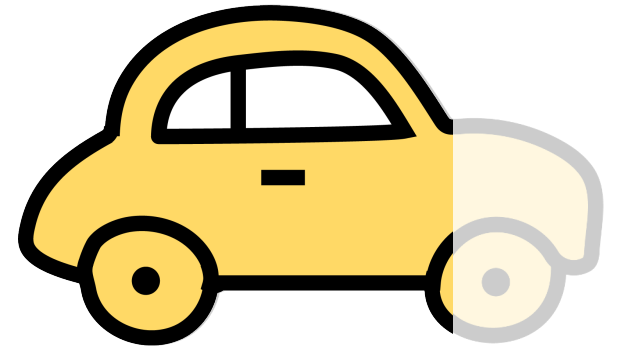
Amid COVID-19,

49%

have downloaded
either 1, 2 or 3 new apps.

74%

use third-party delivery
services the same amount or more
than usual since COVID-19.



50%

are using mobile apps
more often than before
for food, groceries, etc.

PLAYING YOUR CARDS RIGHT TAKES COOPERATION

♠ In a 2020 COVID-19 consumer survey, we discovered that the top 4 customer concerns when it comes to visiting retail and restaurant establishments are:



Employee
Masks



Customer
Masks



Social
Distancing



Surface
Sanitization

♠ Due to the evolving customer expectations during COVID-19, SeeLevel HX developed **CoOperate4Safety**, a voluntary certification program that brings together businesses, consumers and municipalities to help stop the spread of COVID-19 while also improving the confidence of customers when visiting establishments.

- ♠ Monthly CoOperators (*teams certified in safety & sanitation practices*)
Assessing Each Location's Performance
- ♠ Certification Signage to Promote your Participation
- ♠ Social Media Monitoring
- ♠ Updated Establishment Ratings Monthly
- ♠ Personalized QR Code with Window Cling
- ♠ And More!

[Learn more about
CoOperate4Safety »](#)

CURIOUS IF YOUR BRAND IS
GAMBLING ON ITS
CUSTOMERS?



Contact SeeLevel HX CEO Lisa van Kesteren
to discuss a customer feedback program for your brand.

lisa.vankesteren@seelevelhx.com

770.851.1170

See
Level
Human Experience SM