

The State of

This second installment covers the impact of COVID-19 related to consumer sentiments for drive-thru, curbside, and contactless pickup.

Conducted in collaboration with **SeeLevel HX** research firm.

What Feeds Us

VOLUME II



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More people are visiting drive-thru, and visiting more often, compared to early COVID-19 (April 2020).



This symbol highlights a **trend analysis** comparing insights from the first study conducted in April - State of What Feeds Us (SWFU)¹ - to this second installment - State of What Feeds Us II (SWFU II).

1.

81% of respondents say anything more than **10 minutes** is too long for drive-thru.

2.

64% of respondents have downloaded at least one or more new apps to purchase food from restaurants, grocers, and other essential stores - this is up from **51%** in SWFU.

3.

There's an increase in mobile app usage to purchase food and essentials. More importantly, the gains are coming from those who previously used it less often and are now using it much more often.

4.

How you communicate health and safety is just as important as actually performing the task.

5.

Out of **28** different safety precautions, an overwhelming number of respondents (**62%**) ranked wearing masks (for staff and customers) as most important.



Drive-thru habits have changed since early COVID-19.



74%

of respondents have **visited the drive-thru the same amount or more often** than usual.



43% This is a **43%** jump from SWFU.

81% of respondents say anything more than

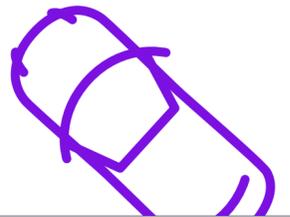
10 mins

for drive-thru is too long.

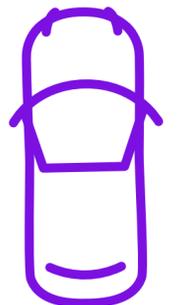
Did You Know?

Average speed of drive-thru service is

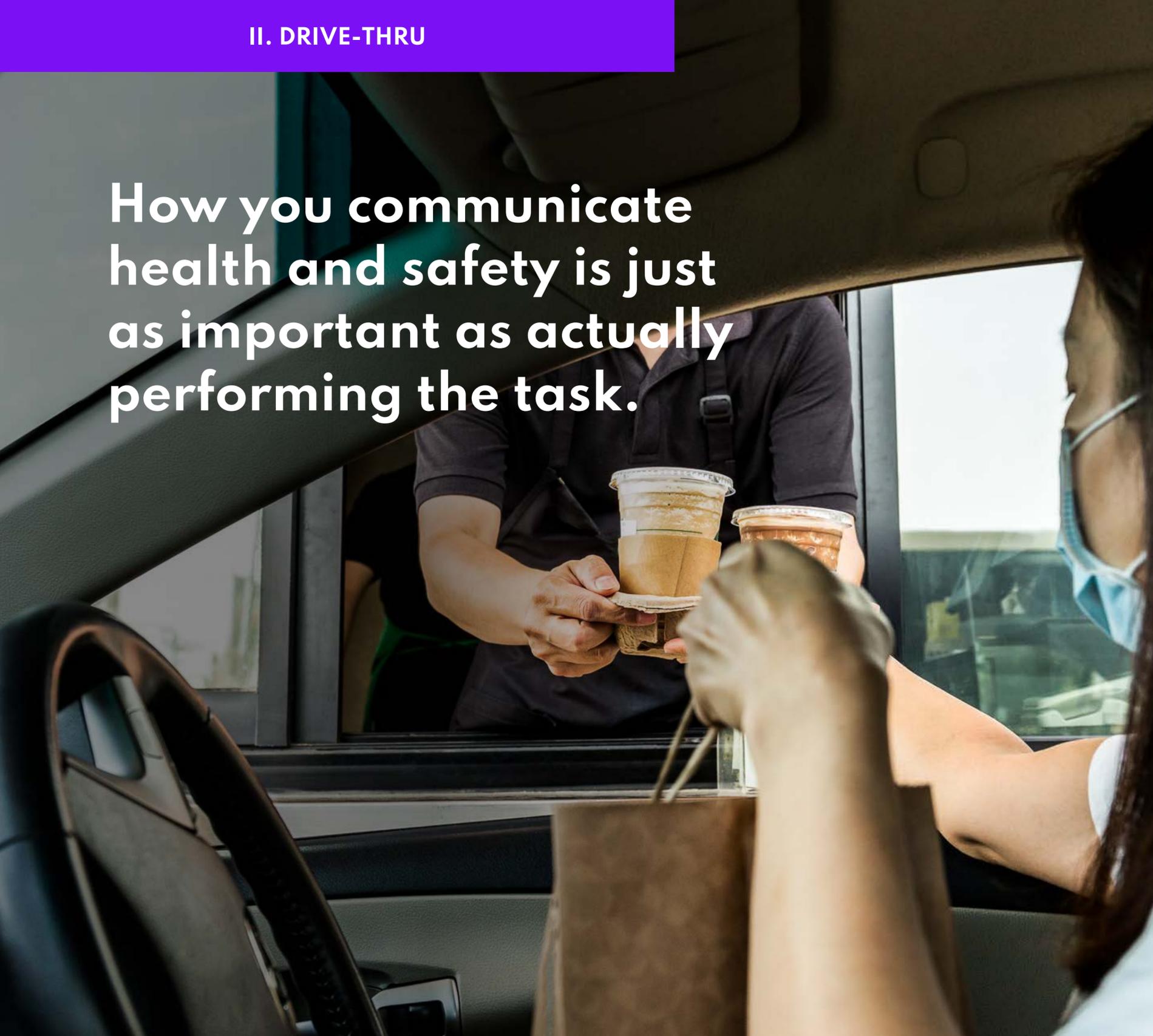
**4 mins
15 secs.¹**



That equates to **only 2 cars completing the drive-thru** before it becomes frustrating for the consumer.



How you communicate health and safety is just as important as actually performing the task.



29%

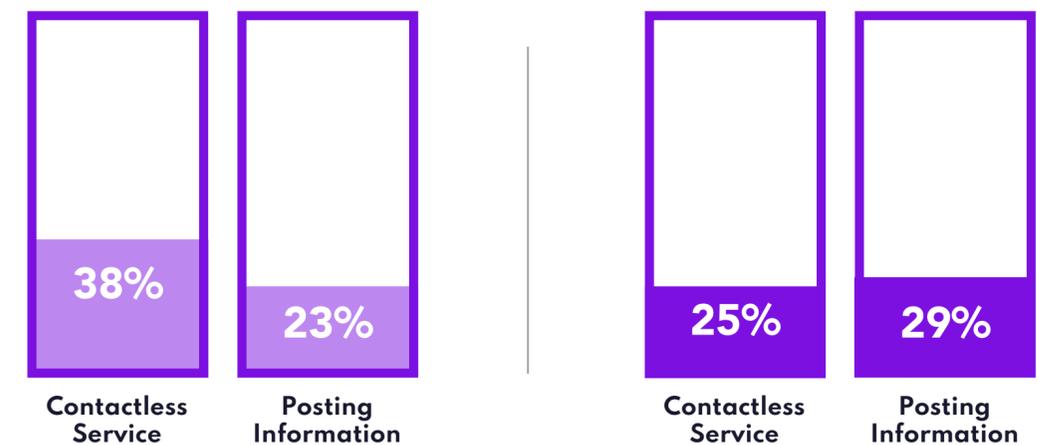
of respondents say they feel safer when sanitation and safety information is posted at the drive-thru window, followed closely by less contact or zero contact with staff (25%).



SWFU II reveals a **slight shift in consumer sentiment** on what's most important between contactless service and posting safety information.

SWFU

SWFU II



Curbside pickup is experiencing higher usage now compared to early COVID-19.

62%

of respondents have used curbside pickup at a restaurant the **same amount as before or more often than before** in the last month.

40%

have used curbside pickup at a restaurant **more than usual**, compared to SWFU with only **27%**.





We're seeing an increase in importance when it comes to staff wearing a mask and gloves at curbside.



There's been a shift in curbside consumer safety priorities.

Me not needing to leave my car:



SWFU



SWFU II



Staff meeting me at curbside with mask & gloves:



SWFU



SWFU II



Minimal or zero contact and interaction with staff:



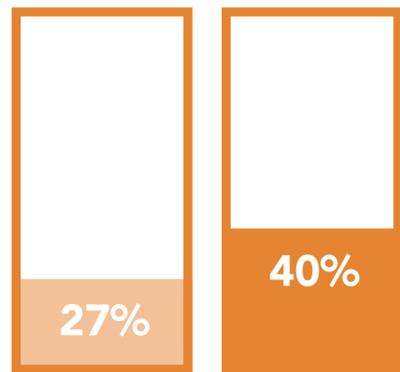
SWFU



SWFU II



Curbside pickup from restaurants is on the rise.



SWFU

SWFU II



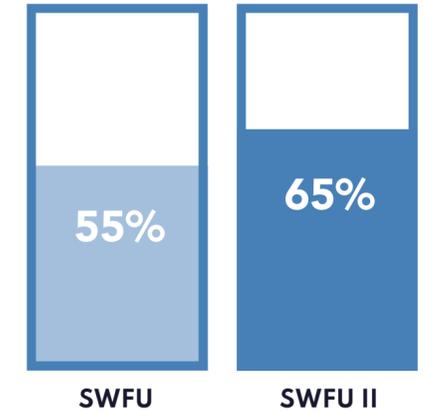
Consumers don't want to wait for in-store order pickup (carryout).



67% of respondents say waiting

6 mins

or more is too long and frustrating for in-store pickup (carryout).



More people have picked up in-store at a restaurant the same amount or more often than before in the last month. This is a **10%** increase from the start of April.

3 OUT OF **4**

respondents (**72%**) experience fear and/or anxiety over walking into a store/restaurant. **This is down from 80%** in SWFU.

There's a significant increase in mobile app usage to purchase food and essentials.



64%

64% of respondents have downloaded at least one or more new apps to purchase food from restaurants, grocers, and other essential stores.

This is up nearly 15% from April (51% in SWFU).



App Usage

Same amount or more often than before:



SWFU



SWFU II

Same amount as before:



SWFU



SWFU II

More often or much more often than before:



SWFU



SWFU II

8%

The gains (8%) are coming from those who previously used apps less often and are now using them much more often to purchase food and essentials.



39%

Respondents continue to use apps the same amount as three months ago (39% in SWFU).



are using mobile apps to order food, groceries and other products the same or more often than before - up slightly from 85% in SWFU.

64%

of respondents prefer notifying restaurants of arrival via the app or texting. Of which, it's an even split between **automated checkins via the app** or **texting the restaurant directly**.

Note: **App customers typically generate higher CLTV** compared to one-time texting customers.¹



49%

49% have downloaded two or more - up just slightly from **45%** in SWFU.

Employees NOT wearing masks is by far the #1 reason respondents will not return to an establishment.

62%

Out of 28 different safety precautions, an overwhelming number of respondents (62%) ranked wearing masks (for staff and customers) as most important.



NEARLY

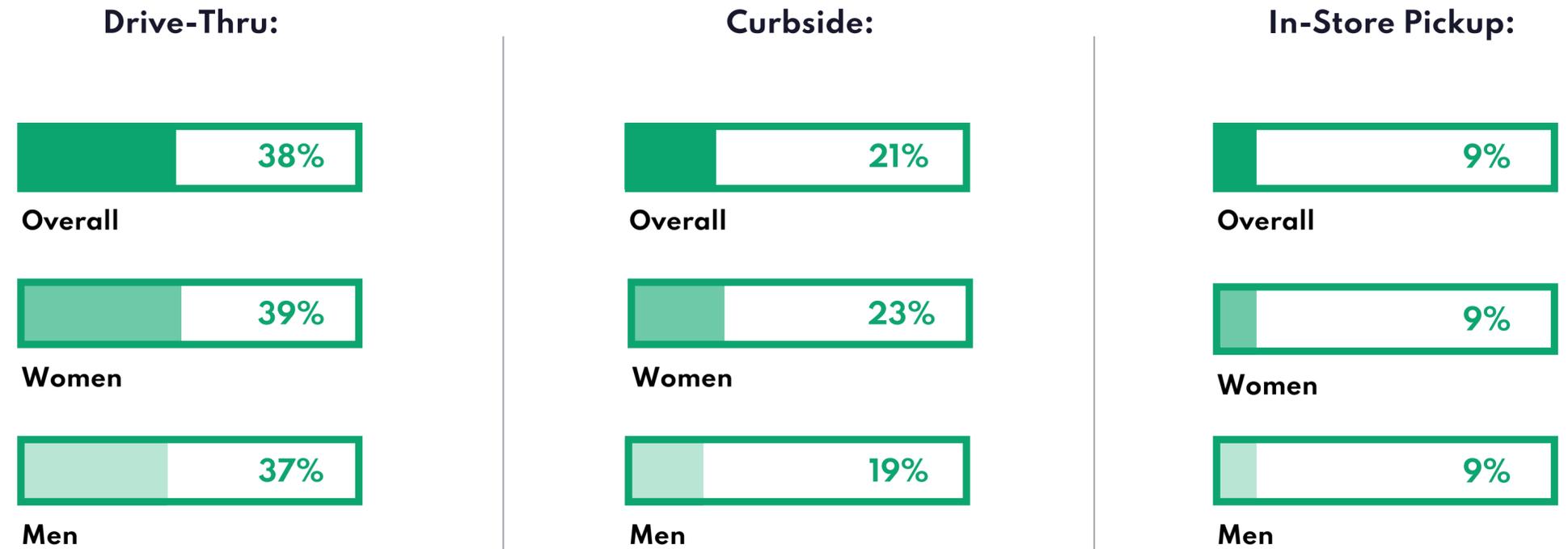
40%

of respondents feel the drive-thru is the safest option (compared to restaurant delivery, 3rd party delivery, carryout, etc.), followed by curbside pickup.



Women perceive drive-thru as **3.5X** safer than in-store pickup.

What's safest? From consumer perception, drive-thru wins every time.

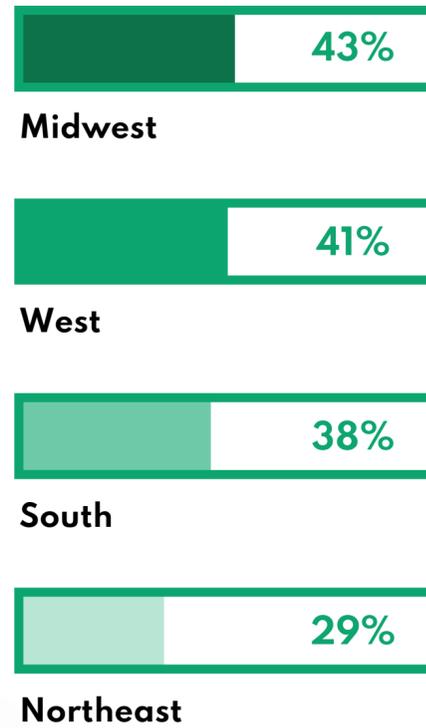


Nationally, **drive-thru** considered safest among different order and pickup options.

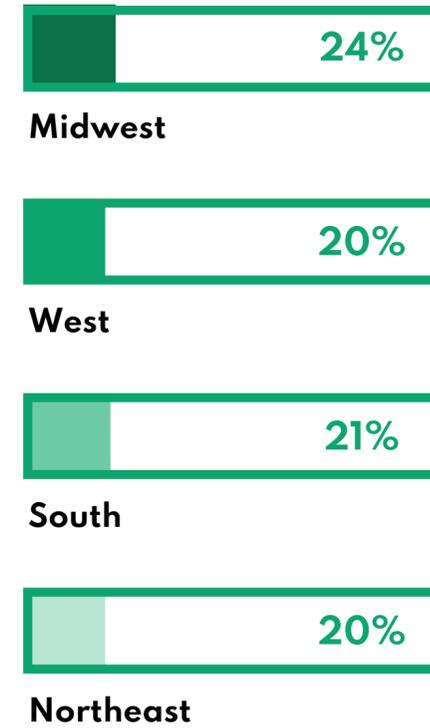


Top 3 Order and Pickup Options by Region

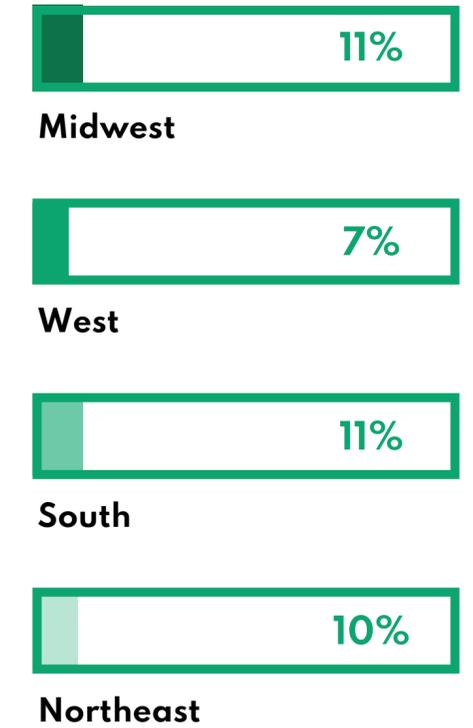
Drive-Thru:



Curbside:

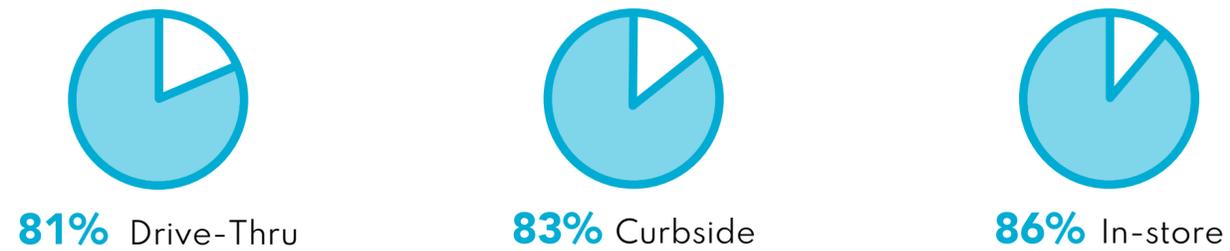


In-Store Pickup:



The closer you get to stepping into a physical store, the less waiting is expected and tolerated.

Percentage of consumers who feel frustrated waiting 10 mins or more:



Gender Differences on Waiting

Willing to wait more than 10 minutes at a drive-thru:



Women



Men

Rank minimal wait times as one of the largest safety factors:



Women



Men



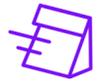
In choosing between fast food drive-thru brands, menu preference is still a main determining factor. Respondents are less price sensitive.



Glossary



Drive-Thru: Picking up an order via drive-thru lane/window



Curbside: picking up an order in the parking lot



In-Store Pickup/Carryout: picking up an order inside the store



Methodology

The survey was conducted and completed by SeeLevel HX between June 23-July 2, 2020, among a national sample of 1,501 American adults aged 18 and older. Qualified respondents were those who had visited a fast food drive-thru in the past month. Within the general population, the age groups were slightly balanced to be representative of the U.S.

Sourcesⁱ

Source: Trend analysis is based on the State of What Feeds Us study conducted in April 2020.

Source: App users tend to generate higher CLTV compared to non-app using customers.

Source: The average speed of service at the drive-thru is from QSR Drive-Thru Study 2019.

About Us



Bluedot's location technology for mobile apps powers meaningful interactions between brands and their customers across key industries including retail, quick service restaurants, and transportation. With pinpoint accuracy, Bluedot's easy-to-implement location technology can identify when a mobile app user arrives at a business, places mobile orders at drive-thrus, arrives at a curbside or pick-up spot, or passes a toll location. Inherently compliant with GDPR and CCPA, Bluedot focuses on protecting end-user privacy and never shares or sells personal information.

Top global QSR brands trust Bluedot for their location-based needs. For information on Bluedot and its solutions, visit bluedot.io.



Founded in 2008 by a mystery shopping pioneer, Lisa van Kesteren, SeeLevel HX supports the improvement of customer experience, brand reputation and brand loyalty through competitive intelligence, market research and other customer feedback services. With over 55 years of combined industry experience, 792,000 secret shoppers and employees in every time zone across the nation, SeeLevel HX continues to be a leader in mystery shopping for the QSR and fast casual, retail, financial services and automotive industries. For more information or to see business at the level of your customers, visit seelevelhx.com

