

The Current State of the Digital Experience

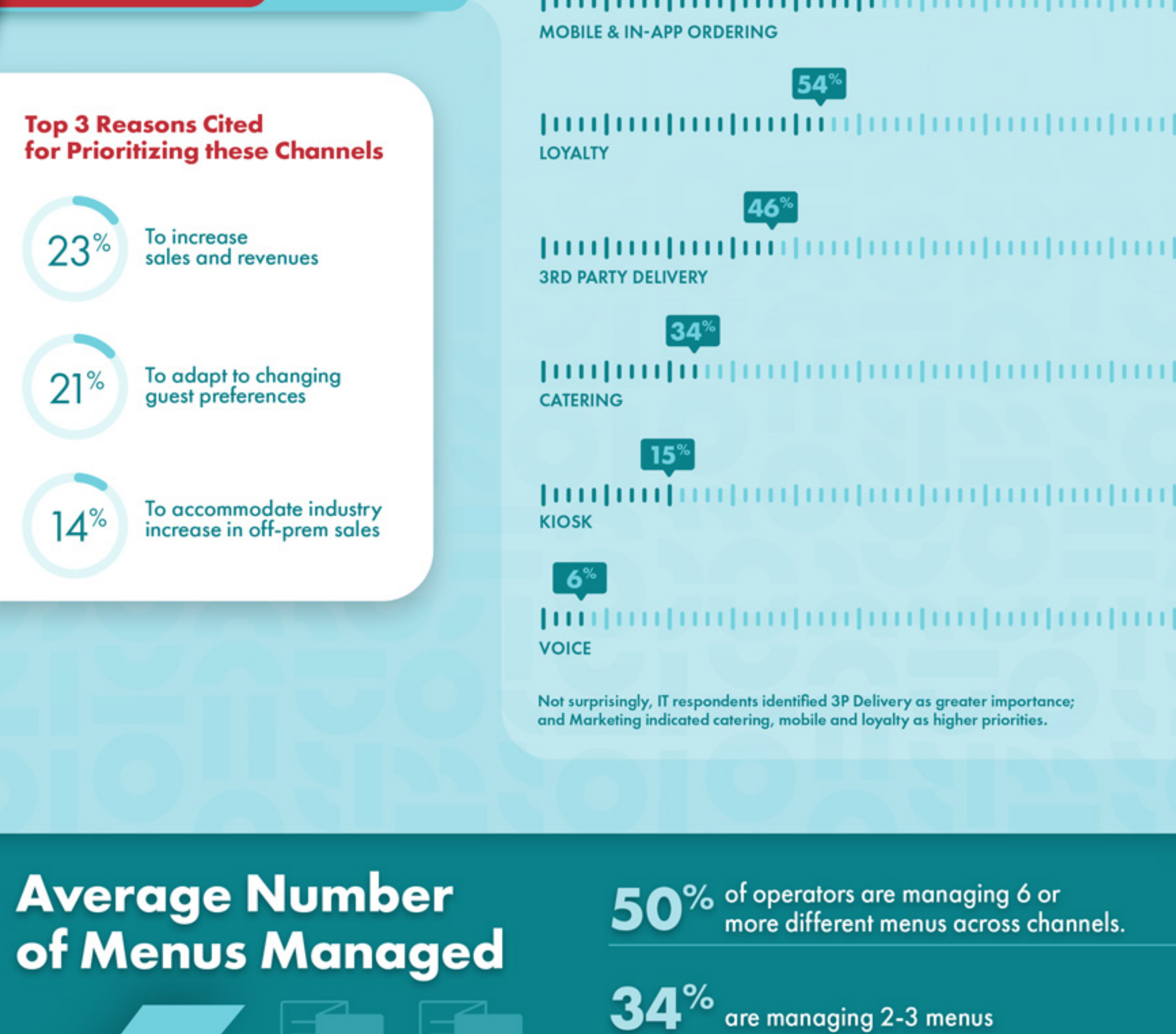
AS REPORTED BY ENTERPRISE RESTAURANT OPERATORS*

* Enterprise defined as brands with over 25 locations.

TOP DIGITAL & OMNI-CHANNEL PRIORITIES IN 2020

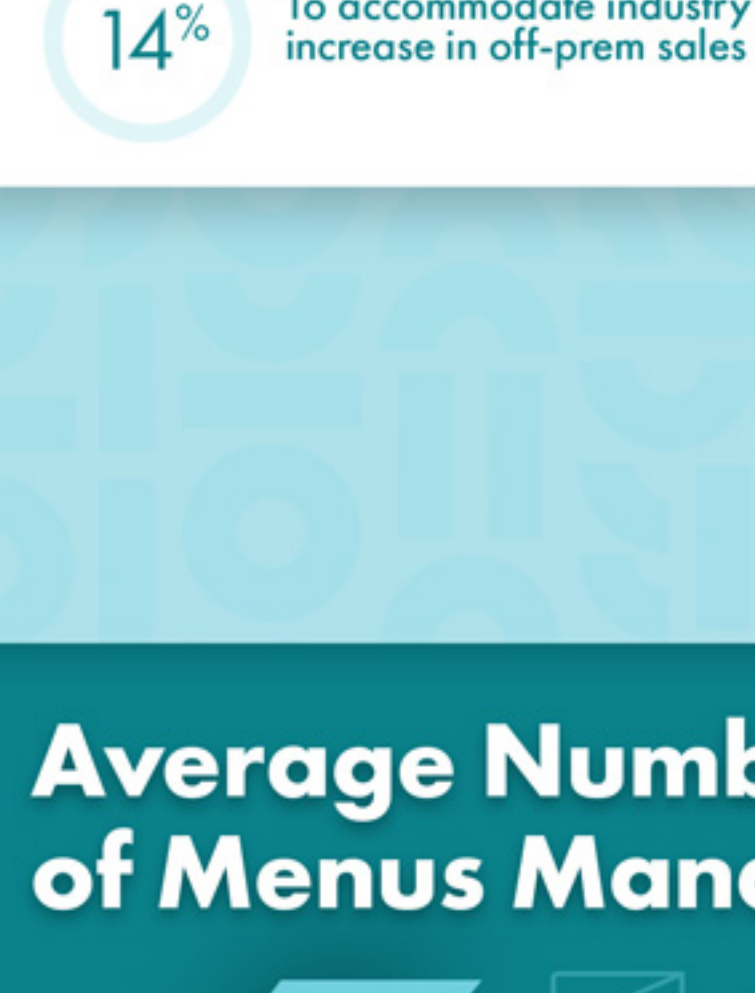
75% of enterprise operators ranked Online Ordering as their top digital priority in 2020.

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.



Not surprisingly, IT respondents identified 3P Delivery as greater importance; and Marketing indicated catering, mobile and loyalty as higher priorities.

Top 3 Reasons Cited for Prioritizing these Channels



Average Number of Menus Managed

6

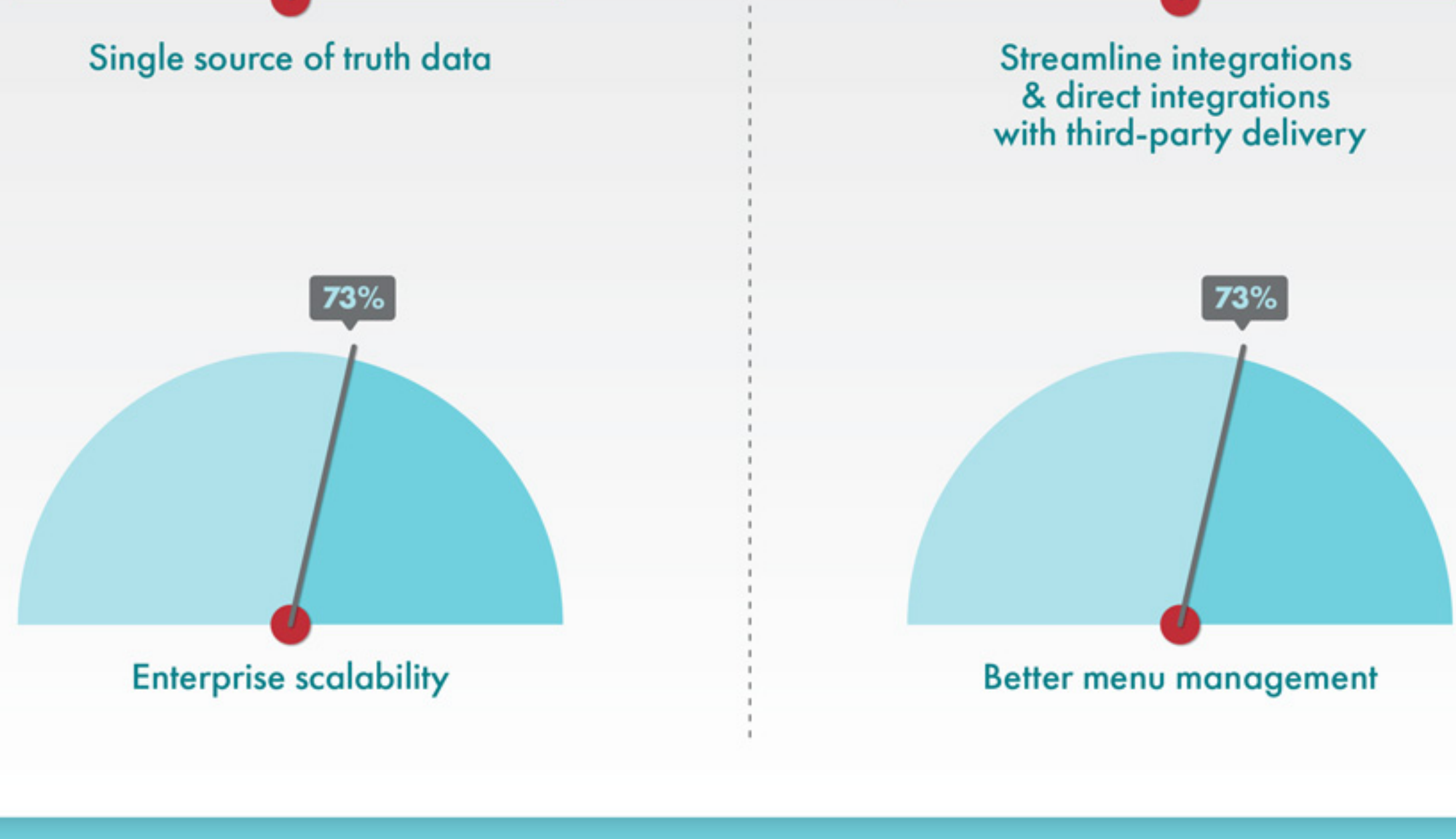
50% of operators are managing 6 or more different menus across channels.

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

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.

72% GRUBHUB

72% DOORDASH

68% Uber Eats

54% ezcater

51% Postmates

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

Cloud POS

41%

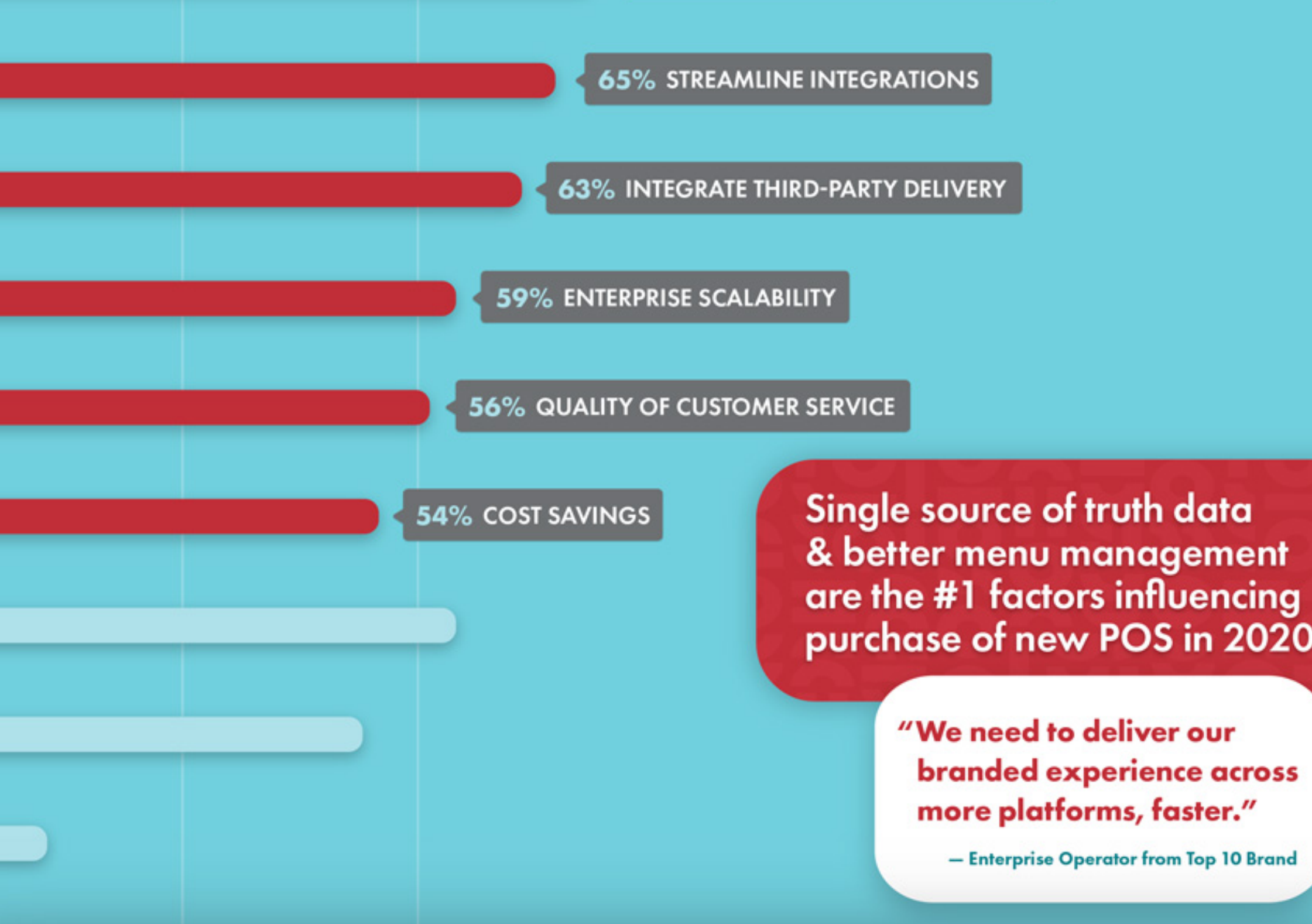
Legacy POS

59%

54 enterprise brands use over 22 different POS systems.

Signals high dissolution 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 brand experience across more platforms, faster."

— Enterprise Operator from Top 10 Brand

How are POS vendors performing?

(Average Grade = "C" or "Fair")

Not a strong vote of confidence.

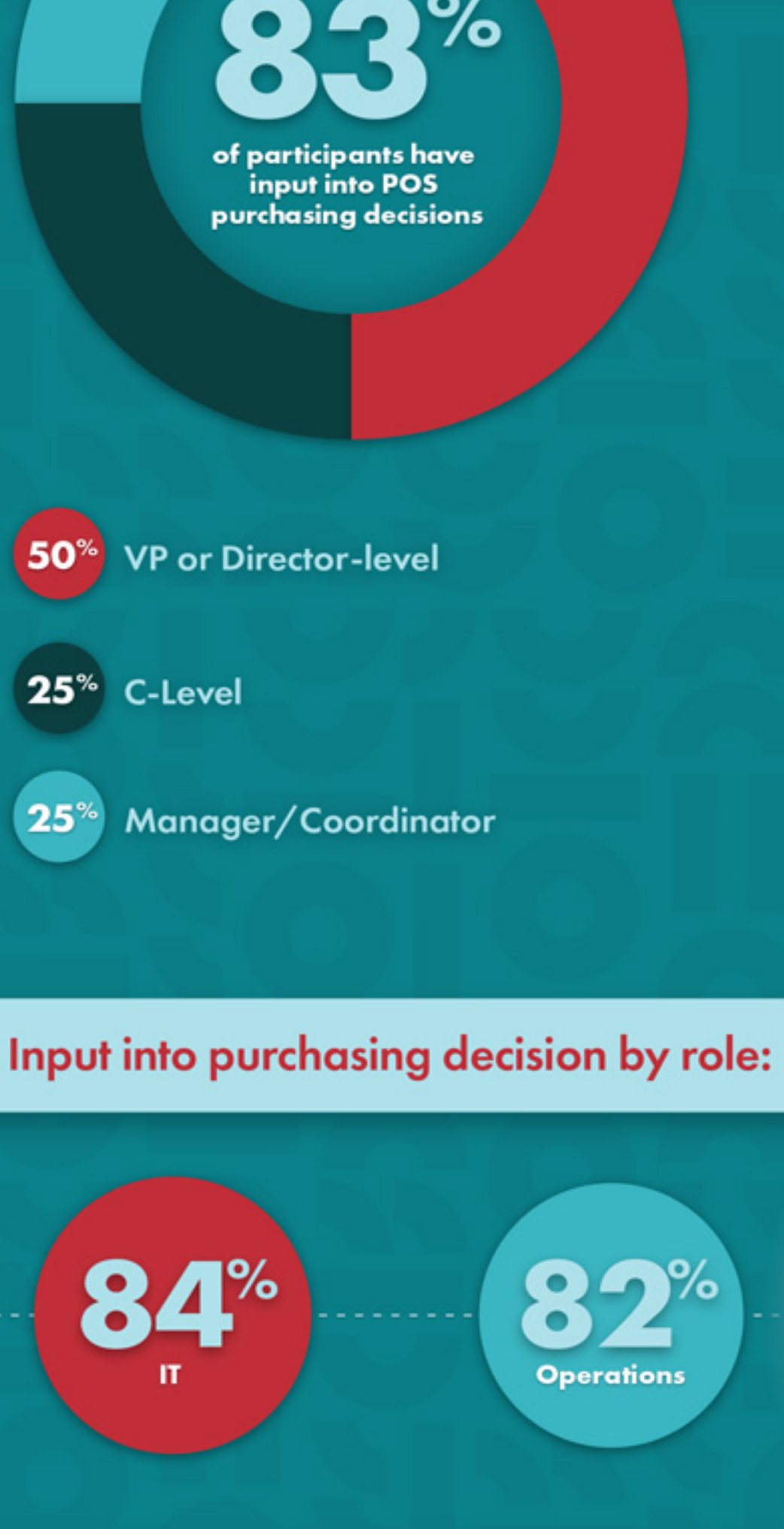


88% of dis-satisfied respondents (poor or very poor) are most frustrated with their POS' inability to integrate with third-party delivery and lack of scalability.

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:

