



Restaurant Success in 2019

• INDUSTRY REPORT •



Introduction

Opening a restaurant is one of the most daunting adventures in business, but it's also one of the most exhilarating and fulfilling.

In the restaurant business today, there's greater competition and more financial challenges than ever before, whether they be food, labor, or real estate. This year, 19 states **increased minimum wage**. And although restaurants across the U.S. are diverse, there are key similarities in the ones experiencing success. These restaurants are constantly innovating and adapting — leveraging technology, data, and new staff management practices to meet the changing expectations of their guests.

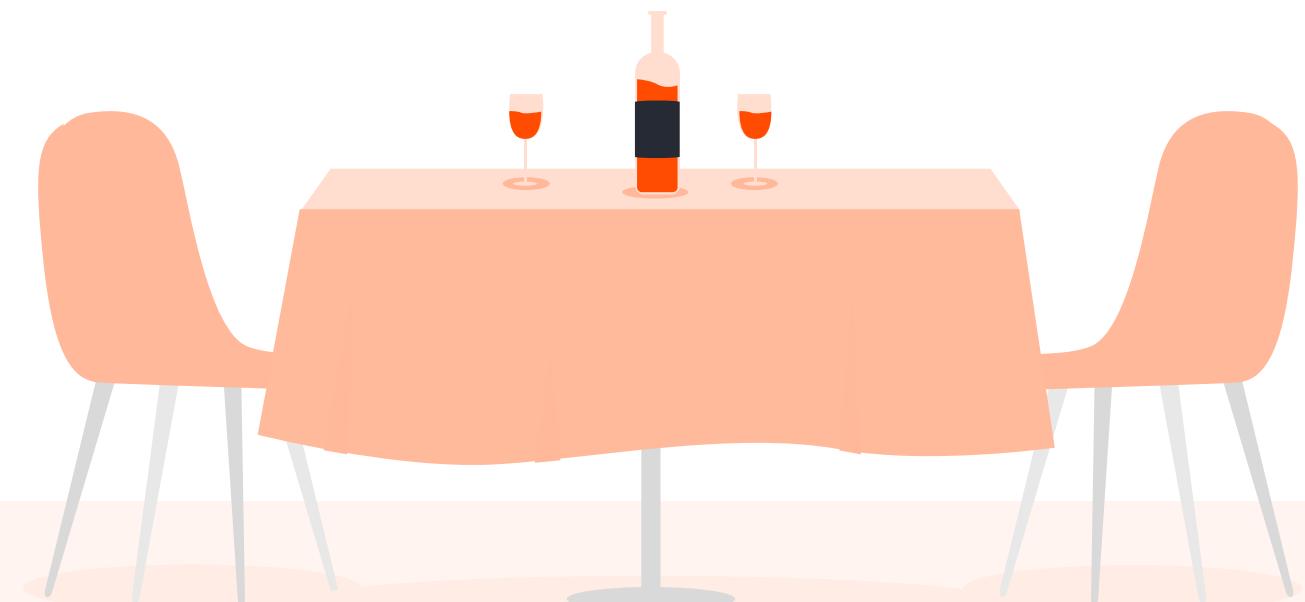
Today's successful restaurateurs are students of the industry, constantly testing new behaviors and approaches to improve the restaurant experience. Take **Saddleback BBQ**, a multi-location

restaurant in Michigan, which uses a continued service style of dining where their guests are greeted by hosts but encouraged to order from a kiosk or handheld tablets, allowing guests to dine on their own schedule. This approach helps staff spend less time running back and forth to their POS system and more time delighting guests. Or **Suviche**, a full-service sushi and ceviche Peruvian restaurant in Florida, which uses technology to receive real-time **guest feedback** to improve customer experiences, coach staff, and prevent negative Yelp reviews.

Regardless of the approach, every restaurant defines success differently. This report outlines the key takeaways, behaviors, and outcomes of the restaurant industry today to help restaurateurs build their roadmaps for success in 2019.

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Key Findings

The key takeaways, behaviors, and outcomes of the restaurant industry today, as reported by restaurant professionals and guests.

1

Managing Operating Costs and Investing in Staff Is Critical

Restaurant professionals ranked **high operating and food costs** and **hiring staff** as their top challenges to running a restaurant, with **52%** citing **high operating and food costs** and **51%** citing **hiring staff**. Training staff came in third with 35% of restaurateurs selecting it as a top challenge.

When it comes to training new hires, the majority of restaurants (**68%**) use an **employee handbook**, but only **19% use online training** and only **36% have a formal 30-day check-in**. **These resources are essential to hiring and retaining great teams.**

For example, Andreas Xenohristos, Director of Operations at **Cava Mezze**, in Washington, D.C., trains his staff with videos and easy-to-read articles, saying, “It’s so simple that you can read a few sentences and understand what you’re doing.”

2

Your Product Needs to Be as Good As Your Marketing

Why do guests choose a restaurant?

72% of guests said quality of food was important. 65% of restaurant professionals agreed, but they ranked **value (i.e. well-priced menus)** as the next most important criteria. Guests, however, ranked **taste and flavor preferences higher**.

What's the solution? Successful restaurant professionals choose quality ingredients wisely. These restaurateurs select flavors and tastes that accent main dishes so their guests enjoy great meals but they don't sacrifice their bottom lines.

For example, owner Angela Tse of **Morgan & York**, in Ann Arbor, Michigan, sources local produce to provide natural and artisan-quality meals to guests: “You’re supporting the local economy but you’re also getting the freshest ingredients. We want to provide our customers with the best products we can.”

3

Guest Technology Is Booming

Guests listed **wifi availability, online reservations, and consumer ordering programs** as restaurant technologies most important to their guest experience. Alternatively, restaurant professionals listed **gift card programs, online ordering programs**, and **wifi availability** as restaurant technologies most important to their businesses.

In this case, restaurant professionals and guests are pretty aligned on expectations. The key, however, is that successful restaurants meet their guests' expected requirements (wifi, online reservations, and ordering) while also making loyalty programs a frictionless experience and offering vouchers and promotions to transform those guests into loyal customers.

Take **Moonie's Burger House** in Cedar Park, Texas. A seamless online ordering program sends their online takeout orders directly to the kitchen, improving order accuracy and reducing frustrating phone calls. By combining a loyalty program with 3,000+ engaged customers, Moonie's Burger House has cultivated a community in Cedar Park, incentivizing guests to return again and again.

The Report

As the restaurant industry grows — and **the number of people eating out eclipses the number of people eating at home** — there are plenty of opportunities for restaurants to find success. But as a restaurant professional, it's not always easy to know what those opportunities are.

Toast surveyed **1,253 restaurant owners, operators, and staff** and **1,030 restaurant guests** across the U.S. to understand their thoughts on what makes a great restaurant, the technology trends driving change, and where the industry is headed next. In some cases, we compared the answers of restaurant professionals and guests to see how they agree — or disagree — about common restaurant practices.

The Restaurant Success in 2019 industry report is organized by the steps of the restaurant experience:

what happens before, during, and after a guest comes to dine. This report also looks at staffing and back-office best practices.

We run this report every year because **we care about the success of the restaurant industry**. At Toast, we spend every waking hour thinking about how to move the restaurant industry forward. Our mission is all about bringing restaurants into the future. It's about democratizing technology to empower everyone in our community to succeed. It's about running great businesses and chasing dreams. But more than anything, it's about empowering the restaurant community to delight their guests, do what they love, and thrive. And while some restaurant management challenges may be daunting, we're here to help along the way.



Read Past Toast Industry Reports

[2017 RESTAURANT TECHNOLOGY REPORT →](#)

[2017 RESTAURANT SUCCESS REPORT →](#)

[2018 RESTAURANT SUCCESS REPORT →](#)

CHAPTER ONE

Defining Restaurant Success

The Challenges Facing Restaurateurs in 2019



52% of restaurant professionals named high operating and food costs a top challenge.



91% of restaurant professionals expect their profits to increase in 2019.

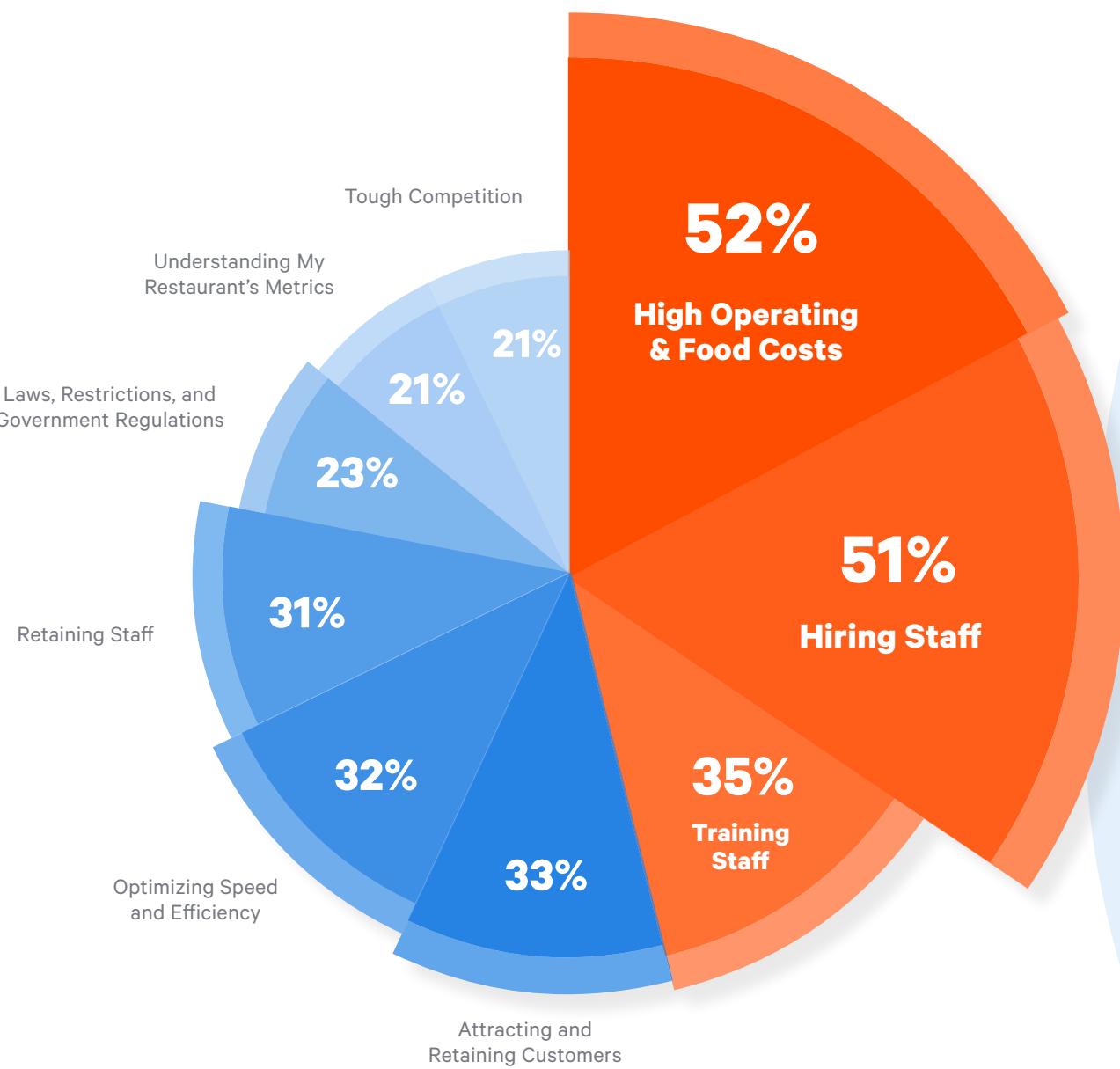


65% of restaurant professionals raised menu prices in 2018 (up from 56% the previous year).

What does it mean to run a successful restaurant? “Restaurant success” is a term we’re using throughout this report to highlight restaurants that saw an increase in net profit year-over-year. The answers to this year’s survey underscore how hard it is to run a successful restaurant, but they also show how optimistic restaurant

professionals are, despite the obstacles. **The love of hospitality and food still shines through.**

Restaurant professionals ranked their three biggest challenges to running a successful restaurant in 2019 as **hiring staff, high operating and food costs, and training staff.**



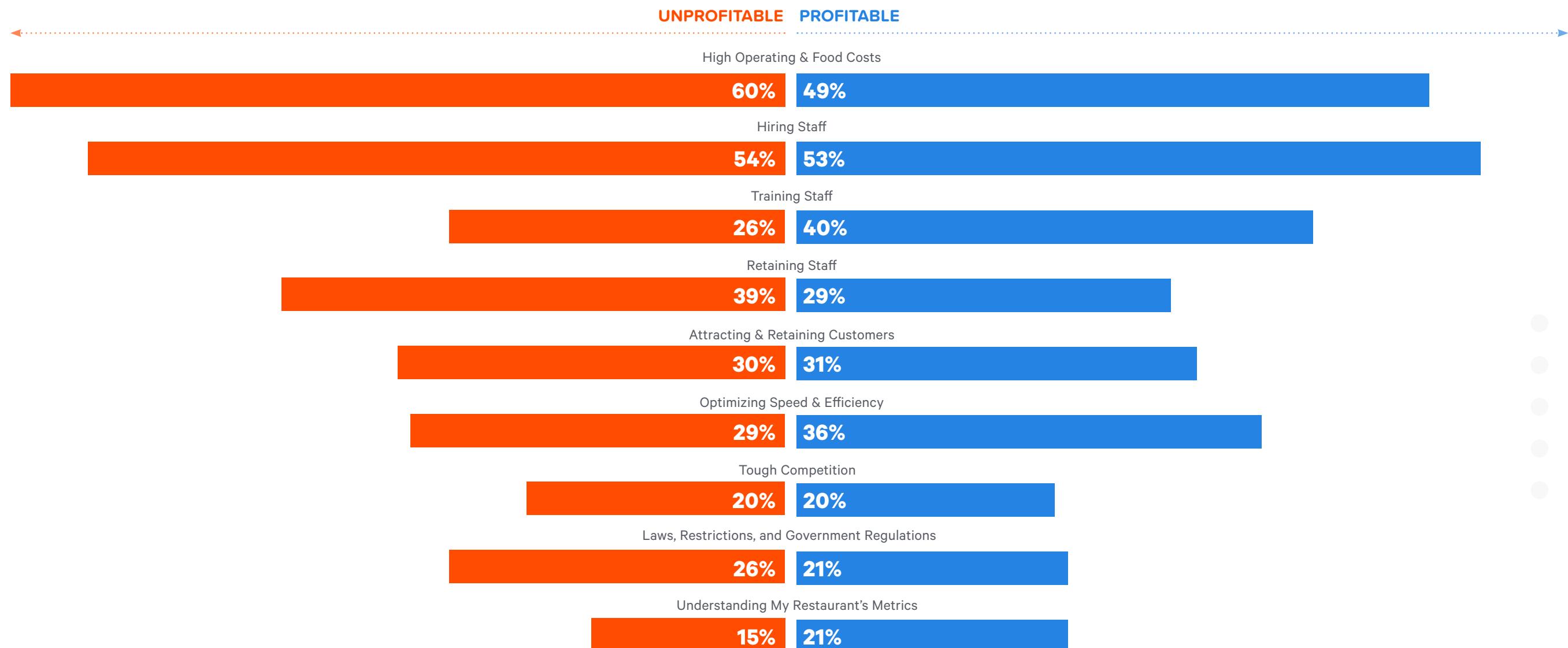
Toast wanted to dig into these challenges to understand how they translate to a successful restaurant, so we cross-checked these responses by comparing restaurants that said: “restaurants that said they saw a positive trend in net profit to restaurants that said they saw a negative trend in net profits” to understand how each group approached these challenges.

60% of unprofitable restaurants identified **high operating and food costs** as their number one challenge, while 53% of profitable restaurants identified **hiring staff** as their number one challenge. Less-profitable restaurants are likely hyper-aware that the cost of doing business — including rent, inventory, employee salaries, overtime, etc. — is eating into their bottom lines. Successful restaurants also worry about costs — 49% of them identified it as a

top challenge — but are more focused on hiring staff to support their businesses.

Unprofitable restaurants may want to focus their efforts on hiring, training, and retaining high-performing staff members, as their contributions will increase sales, helping offset high operating and food costs.

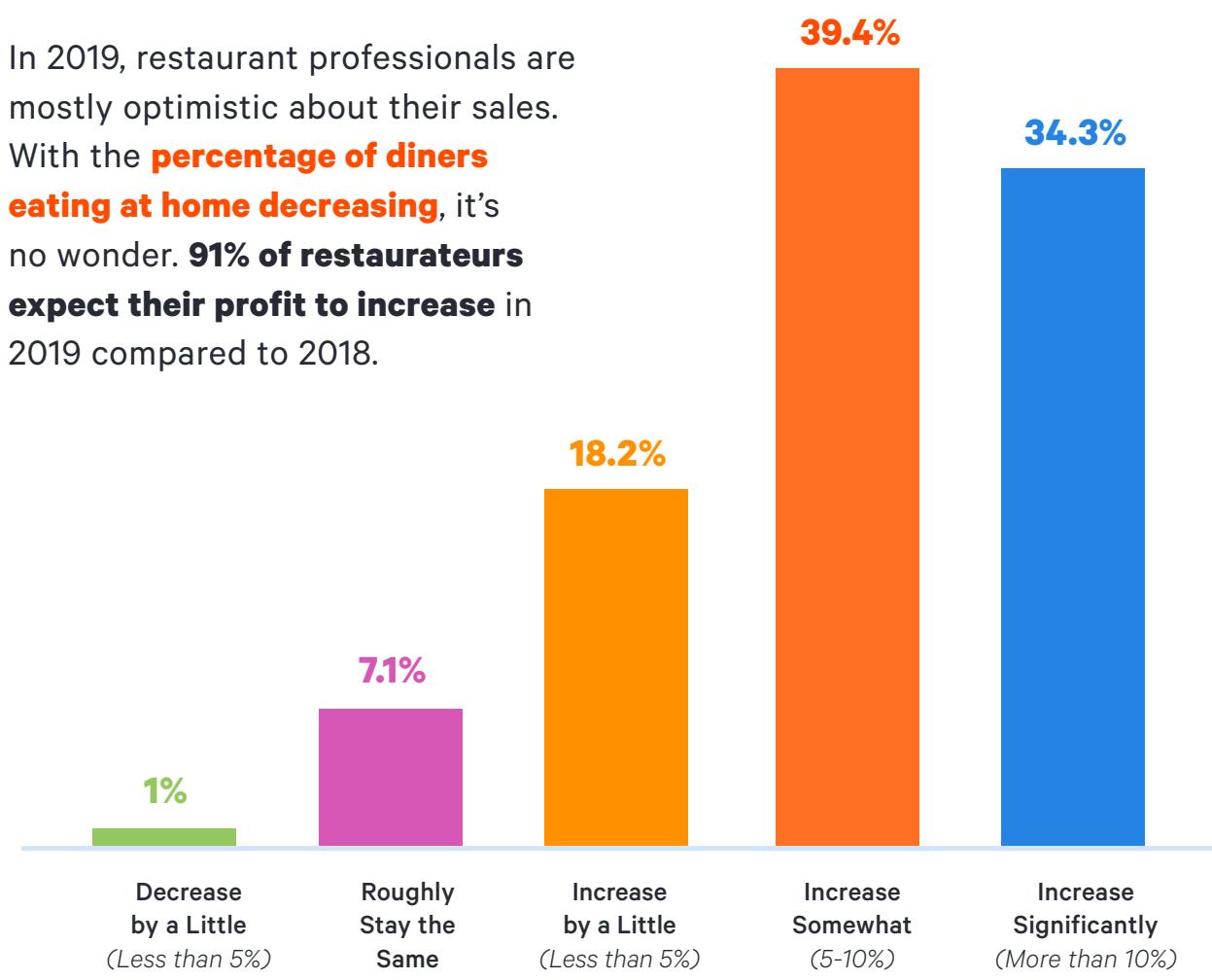
WHAT DO PROFITABLE AND UNPROFITABLE RESTAURANTS IDENTIFY AS THEIR BIGGEST CHALLENGES?





❓ HOW DO YOU THINK YOUR RESTAURANT SALES WILL INCREASE OR DECREASE IN 2019?

In 2019, restaurant professionals are mostly optimistic about their sales. With the **percentage of diners eating at home decreasing**, it's no wonder. **91% of restaurateurs expect their profit to increase** in 2019 compared to 2018.



Compare this to the amount of restaurants that actually increased sales in 2018, and you get a different story. While **62% of restaurants** saw an increase in profit in 2018, **13% of restaurants** saw profit remain steady, and **12% of restaurants** saw profits decrease.

❓ COMPARING YOUR BUSINESS'S PERFORMANCE IN 2018 VERSUS 2017, WHAT HAS BEEN THE TREND IN YOUR RESTAURANT'S NET PROFIT?



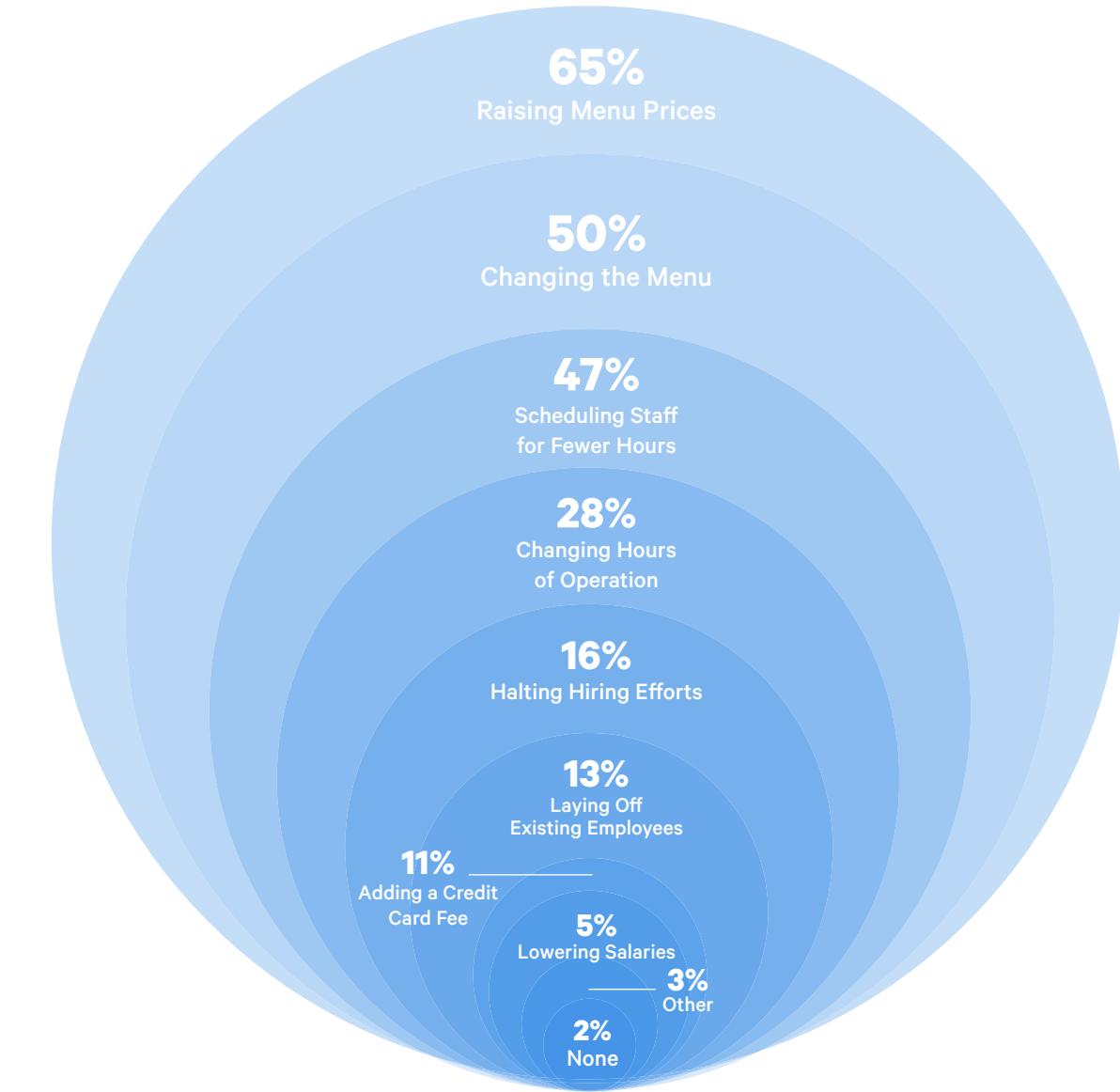
Restaurant success is on the rise as more restaurants saw profits increase this past year.

Last year we found that 51% of restaurants saw profits increase between 2016 and 2017, 17% saw profits decrease, and 16% saw profits stay the same. This data suggests that restaurant success is on the rise — a larger amount of restaurants saw profits increase last year than the previous year.



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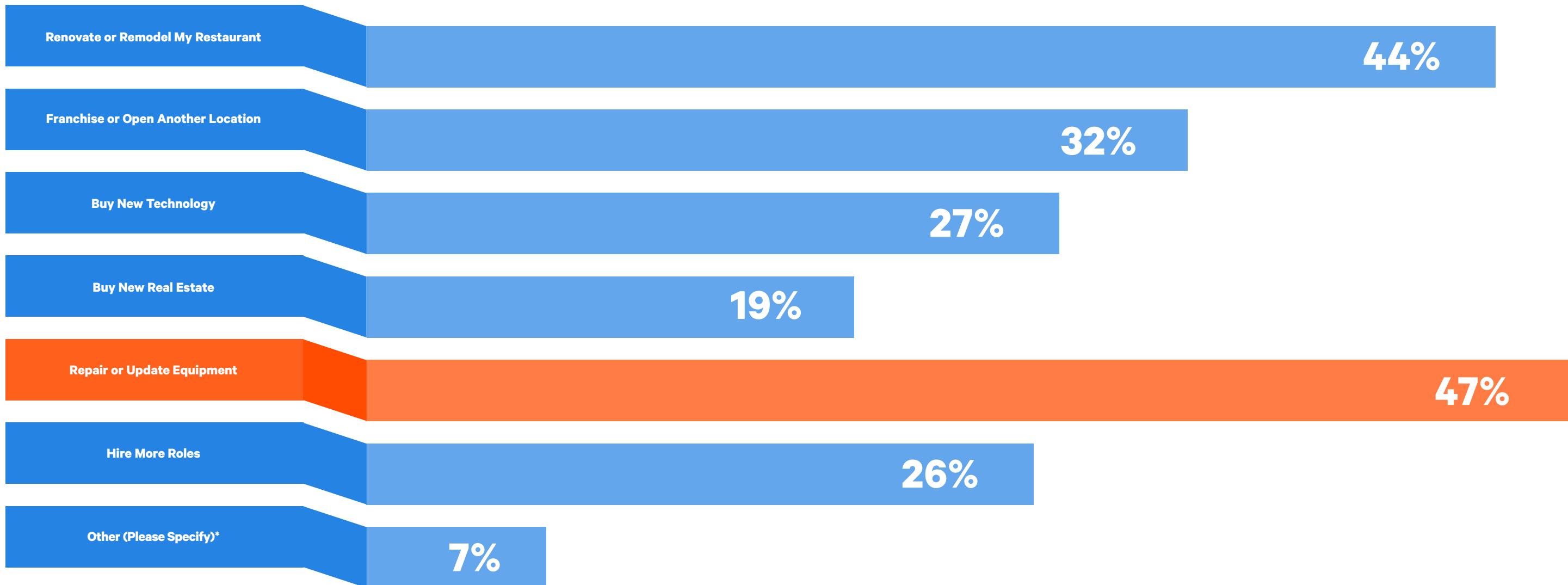
HAVE YOU HAD TO MAKE ANY OF THESE POTENTIALLY CHALLENGING BUSINESS DECISIONS IN THE PAST YEAR AS A RESULT OF THE CHANGING ECONOMY?



The changing economy certainly makes it challenging to run a restaurant in 2019. The **shortage of restaurant workers** and new regulations — such as minimum wage and overtime laws — impact the restaurant industry and choices on compensation, menu prices, and more. As a result, some

restaurants have had to make some challenging business decisions to stay open. In the past year, **65% raised menu prices** (up from 56% the previous year), **50% changed their menus**, and **47% scheduled staff for fewer hours to adapt to the changing economy**.

? IF YOU HAD ADDITIONAL CAPITAL, WHAT WOULD YOU INVEST IT IN TO GROW YOUR BUSINESS?



With more money in their pockets, restaurateurs could allocate funds to solve some of these challenges.

How would they spend the extra cash if they had it?

47% said they would invest in repairing or updating equipment, 44% said they would renovate or remodel their restaurants, and 32% said they would franchise or open another location. Clearly, restaurateurs are thinking

about how new equipment can improve their workflows and how additional locations or expansions can improve their revenue.

Other answers from restaurant professionals included buying a liquor license (**which can cost upwards of \$40,000**), increasing staff wages, selling new products like ice cream, expanding with additional seats and

outdoor space, investing in staff training, and investing in advertising.

One restaurateur even mentioned adding a living wage surcharge for staff, and another mentioned that lack of available staff doesn't allow them to run at full capacity, and they have to turn away business as a result.



Running restaurants is hard.

According to IBISWorld research, 67% of revenues go to wages and purchasing expenses and the average restaurant has just a 6.2% profit margin. With this thin of a profit margin, restaurants are forced to look for opportunities to increase profits, but today's environment of increasing competition (especially from quick service and fast casual concepts), rising wage

costs driven by low unemployment and minimum wage reform, and rising ingredient costs have forced operators to find areas to increase profits simply to maintain prior profitability.

One of the easiest ways for a restaurant to quickly increase profits is by looking at its menu. With ingredient costs fluctuating daily on paper invoices, it

can be almost impossible to keep on top of real-time menu profitability, but by focusing on key ingredients (for instance key proteins) or top-selling menu items, operators can uncover opportunities to either re-price, re-portion, or feature differently with menu items that can significantly increase their profits. Software to automate these processes can be an

extremely helpful tool for time-strapped operators to ensure they are driving profits to their bottom lines.



Rory Crawford
BevSpot Co-Founder



CHAPTER TWO

Curating the Restaurant Experience

Hiring and Training Quality Staff

A restaurant's staff members shape the guest experience, but good employees are notoriously hard to find. 51% of restaurateurs ranked hiring staff a top challenge, with training staff and retaining staff close behind at 35% and 31%, respectively. Restaurateurs are wasting time on re-hiring the same few positions every few months when

a staff member leaves, and replacing an hourly employee **can cost nearly \$6,000**. High turnover also impedes team bonding and collective growth, and it's also just frustrating.

Many restaurateurs are trying to improve their new employee onboarding processes in an attempt

to keep staff fulfilled and on the team longer. These investments set restaurant owners and operators apart as employers who care about the happiness and growth of their teams, but these types of investments need to continue past the first 90 days of a staff member's employment.



31% of restaurant professionals provide health insurance to their staff.



30% of restaurant professionals name "competing with high-paying job offers" a top challenge in preventing employee turnover.



8% of restaurants employ a no-tipping model and 6% add a back-of-house service charge to the check.



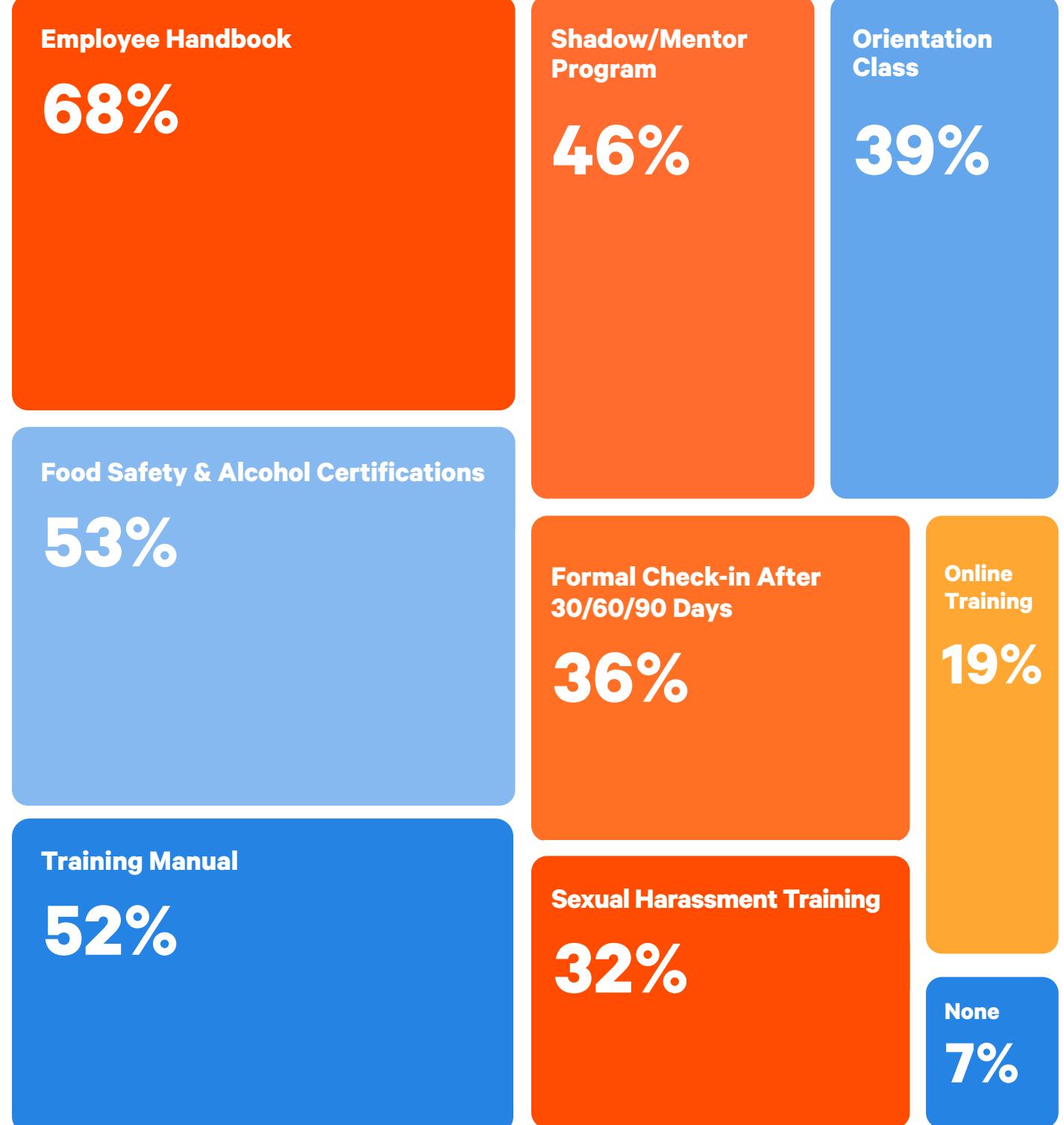
68% of restaurant professionals have an employee handbook to help in the onboarding process, and **53% provide trainings** for food safety and alcohol serving certifications. **46% of restaurant professionals put an emphasis on shadowing** and mentorship to emphasize the potential for employee growth, while **32% provide sexual harassment training** to ensure a safer environment for all staff.

However, the industry continues to grapple with **a huge employee retention problem**. Staff turnover rate in the

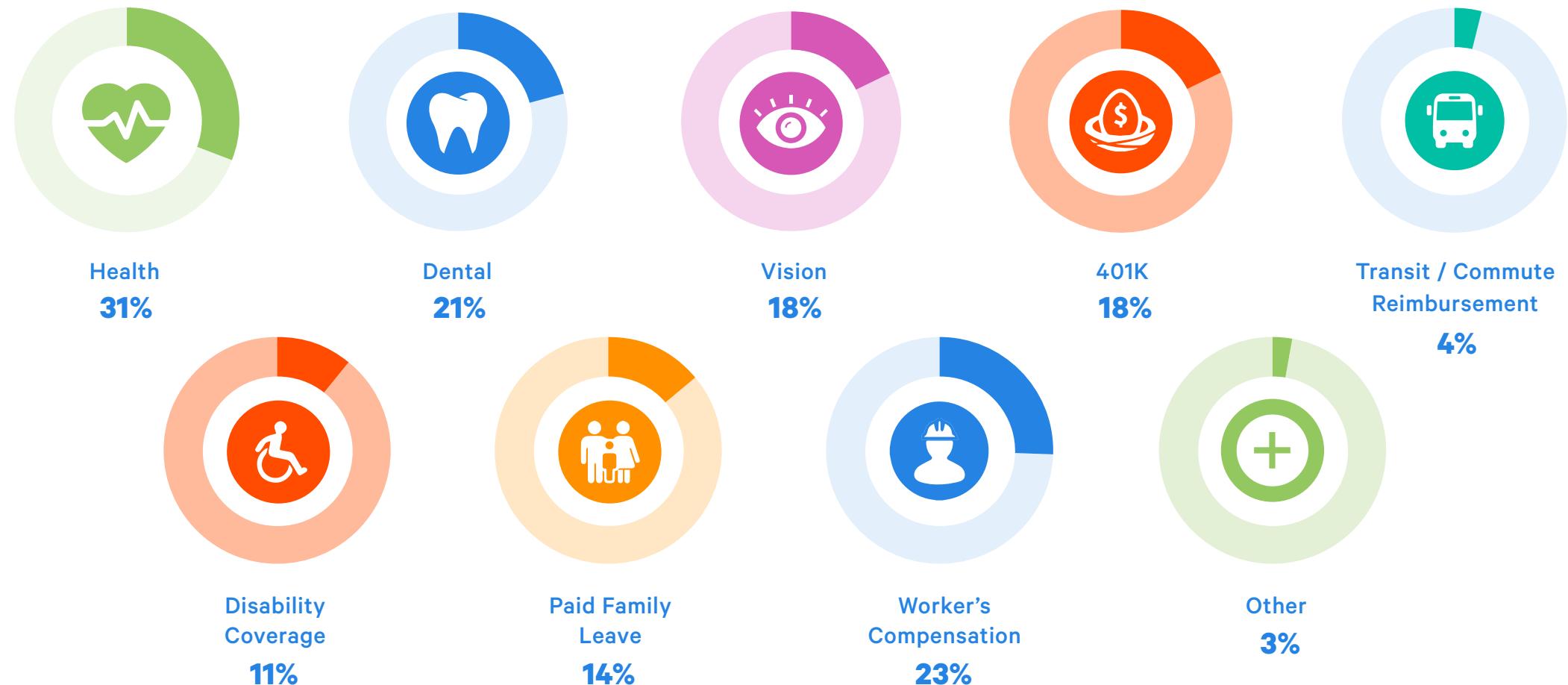
restaurant industry is at an **all-time high of 75%**, meaning that almost three-quarters of employees are unlikely to stay for a whole year.

So why do people leave? Higher-paying job offers was the number one reason why restaurateurs thought their staff members were leaving. Restaurateurs also noted that they struggle to train their employees sufficiently to excel in their roles, which is linked to the next common problem they're facing: employee performance.

? WHICH OF THESE PROGRAMS DO YOU OFFER NEW HIRES?



WHICH OF THE FOLLOWING BENEFITS DO YOU OFFER YOUR EMPLOYEES?



Restaurant employers need to get creative with **benefits**, increase opportunities for higher wages, and create a fantastic work environment if they want to keep their staff members.

Benefits – or a lack thereof – have long been a contentious topic in the service industry. The restaurant industry still has some of the **highest rates** of underinsured and uninsured workers, resulting in the financial insecurity that many restaurant workers feel. It's not uncommon to see great workers leave the

industry for a more stable paycheck and benefits, so if restaurateurs want to create a workplace where their employees feel they can have a long-term career, benefits can be extremely impactful.

However, providing benefits is not easy in this industry, especially for small businesses.

Health insurance in particular is expensive to provide in such a low-margin business, especially one with so much staff turnover, but **31% of respondents do provide health**

insurance to their staff. Most restaurants that elect to do so provide health insurance after a certain amount of time employed — not upon being hired — which is understandable due to the turnover rate and waiting periods for **insurance to kick in.**

Dental and vision benefits are less common, at 21% and 18% respectively. Worker's compensation coverage was surprisingly low, considering that in some **states it is mandatory** to carry worker's compensation insurance for all employees, at only 23%.



Sweet Cheeks BBQ in Boston implemented a 3% Kitchen Appreciation Fee. Here's why:

"As the cost of doing business in Boston increases through the rise of minimum wage, cost of food and goods, mandatory health care coverage, mandatory sick pay, and the ever-increasing cost of a growing urban market, our ability to maximize the wages of our BOH employees are encumbered, constraining their wages to the bottom line resources of the restaurant. We think that's wrong and are committed to a new approach to fix this.

The kitchen appreciation fee allows all BOH employees to directly benefit from the top line success of the restaurant. They feel the love from you, and their living wages increase. Every cent of the 3% goes directly to our BOH employees. We thank you, they thank you. We hope that this gains traction throughout the city and enjoys support from you, our dining community, and beyond."

However, we can't talk about restaurant compensation without talking about tipping. The tipping system is still very much the norm across the industry, with the exception of fast food restaurants, where tips are not expected. A small number of restaurants — by our data, **8% of the market** — are experimenting with a **no-tipping model**, opting to either pay high hourly wages to all employees or adopt a revenue/profit-sharing model. Some restaurants are even changing their staffing models, adding **robots to the kitchen** or **kiosks to the dining**

room. But these staff management models are still very much the exception, not the rule.

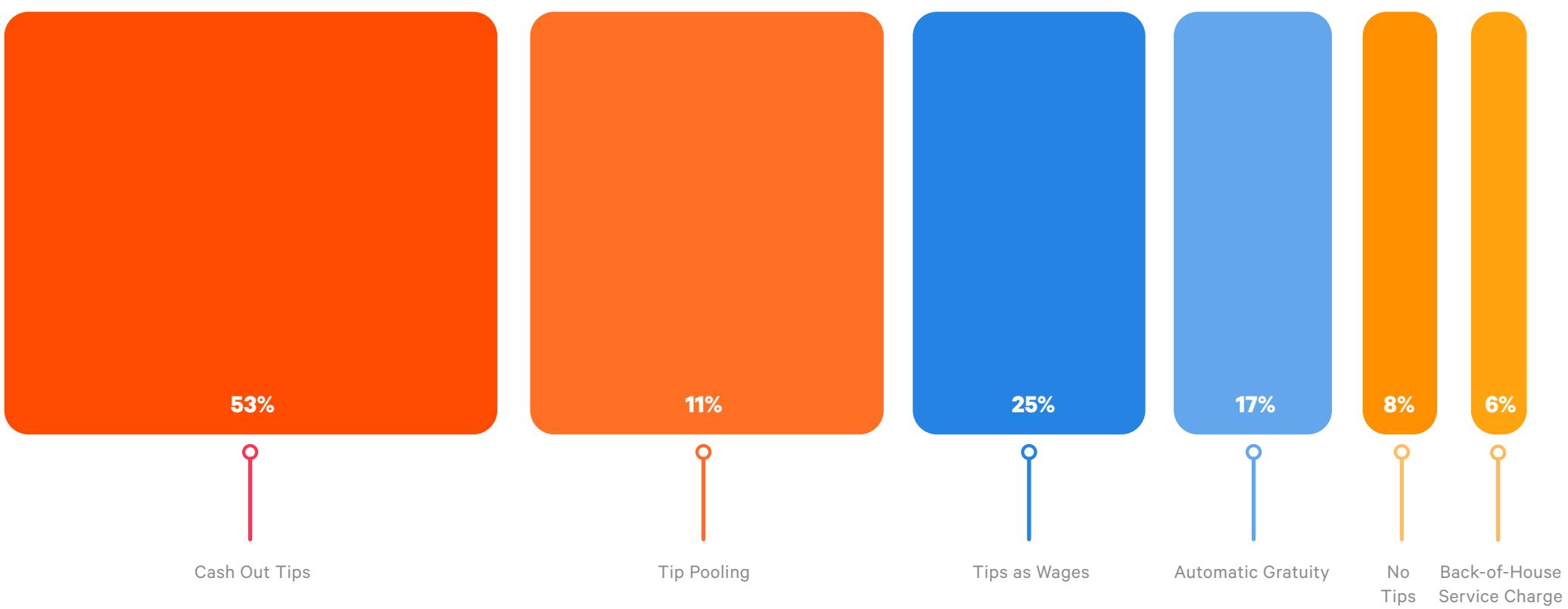
Cash out tips, meaning that servers take home the tips that they earn (minus taxes), table by table, at the end of the night, is the most common system, with **53% of surveyed restaurateurs** using this model. It's popular for many reasons, but chiefly because servers love being able to walk away with cash in hand — though they do have to report their tips to management each night for tax and tip

credit purposes.

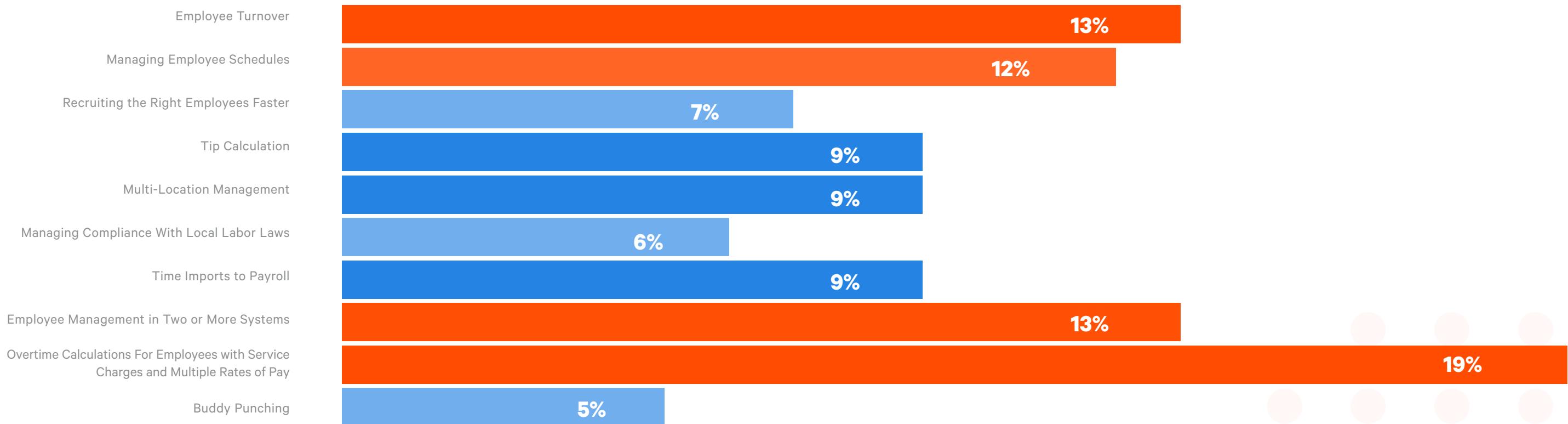
Tip pooling is somewhat less common, with **38% of restaurateurs** using this system. Some love it because servers don't have to compete for busier sections to make more money, and they see the system as more equitable across the dining room floor.

8% of restaurants don't accept tips at all, and **6% are experimenting with a back-of-house service charge** to balance front- and back-of-house wages.

WHICH TIPPING METHOD DOES YOUR RESTAURANT USE?



WHEN YOU THINK ABOUT YOUR EXPERIENCE MANAGING LABOR AND PAYROLL, WHAT ARE THE TOP DIFFICULTIES OR FRUSTRATIONS YOU ENCOUNTER?

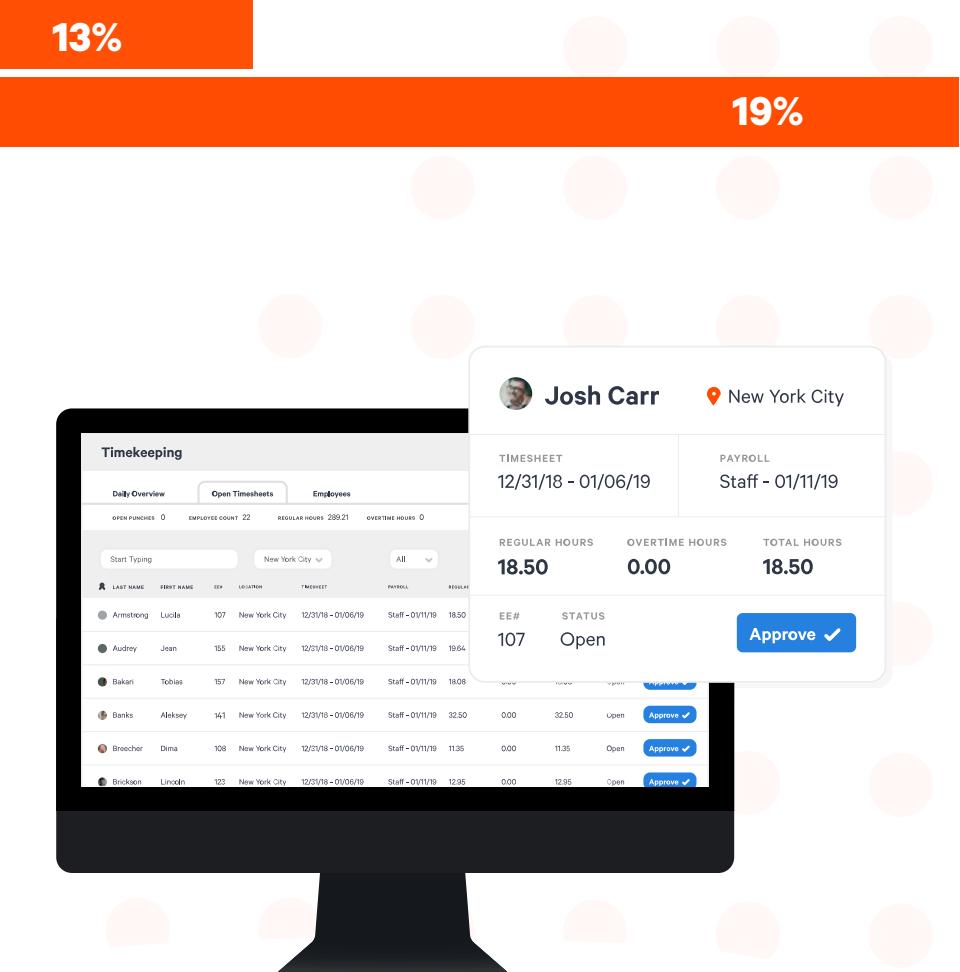


Of course, paying employees isn't always easy, and **doing payroll for restaurants** can take hours of a manager's or owner's time every pay period. Payroll is one of the most important parts of a restaurant operation: If employees aren't paid promptly and correctly, restaurant professionals will find it harder and harder to retain staff.

When it comes to labor management, dealing with **blended overtime** – meaning calculating overtime pay for employees with service charges and multiple pay rates – was the number one complaint that restaurant operators shared. If an employee

works some shifts as a server and others as an assistant manager, they must be paid for overtime hours at "a rate of not less than one-and-a-half times the weighted average of all non-overtime rates used during that workweek," **according to EPay Systems**. Not only do managers have to deal with the added financial burden that comes with paying out overtime, but it can be a pain to have to do additional calculations like this one.

Other common problems included **employee turnover**, using **multiple employee management systems**, and **calculating tips**.



Restaurant Hiring Success Kit

- [HIRING THE MODERN WORKFORCE COURSE →](#)
- [HOW TO DO PAYROLL FOR RESTAURANTS →](#)
- [STAFFING A RESTAURANT: HIRING FOR FRONT-OF-HOUSE JOBS →](#)
- [STAFFING A RESTAURANT: HIRING FOR BACK-OF-HOUSE JOBS →](#)

By integrating payroll software into POS technology, like in Toast's new **Payroll & Labor Management** system, restaurateurs cut the amount of time it takes to run payroll, a task that normally takes anywhere from **two hours to eight hours** every pay period. That's a lot of time a manager doesn't get to spend with staff or customers, doing the parts of the job that they love.



CHAPTER THREE

Before the Restaurant Experience

Marketing to Guests Where They Are



88% of guests said recommendations by friends and family influence their decision to visit a restaurant.



91% of restaurants use Facebook, and 78% use Instagram.



51% of guests ordered directly from a restaurant's website in the past month.





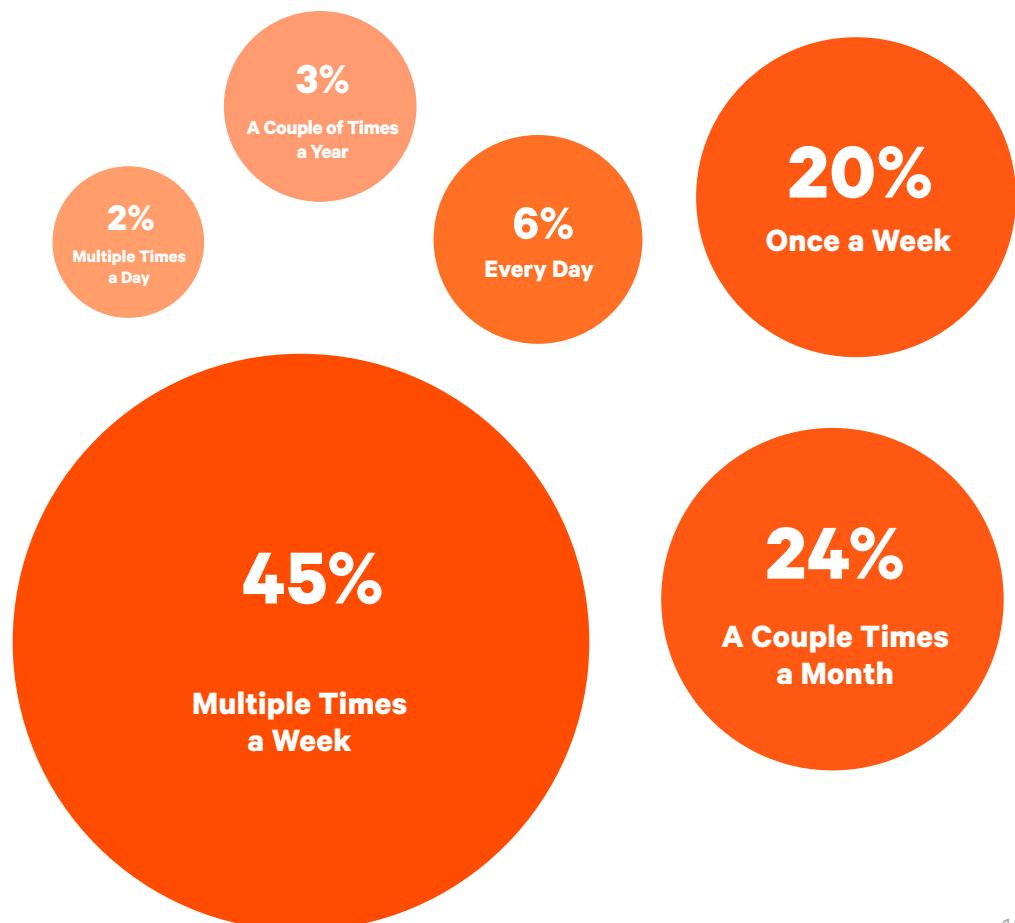
Guest Preferences

The restaurant industry has its difficulties, but it's not short on interested customers. The challenge for restaurant professionals is getting those eager eaters to choose their restaurant time and time again.

45% of our surveyed diners said they eat at a restaurant **multiple times a week**, with another 20% saying they eat at a restaurant **once a week**, and another 6% saying they eat at a restaurant **every single day**. These numbers tell restaurant professionals that the number of potential guests isn't slowing down.

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DINERS, HOW OFTEN DO YOU GO OUT TO EAT?



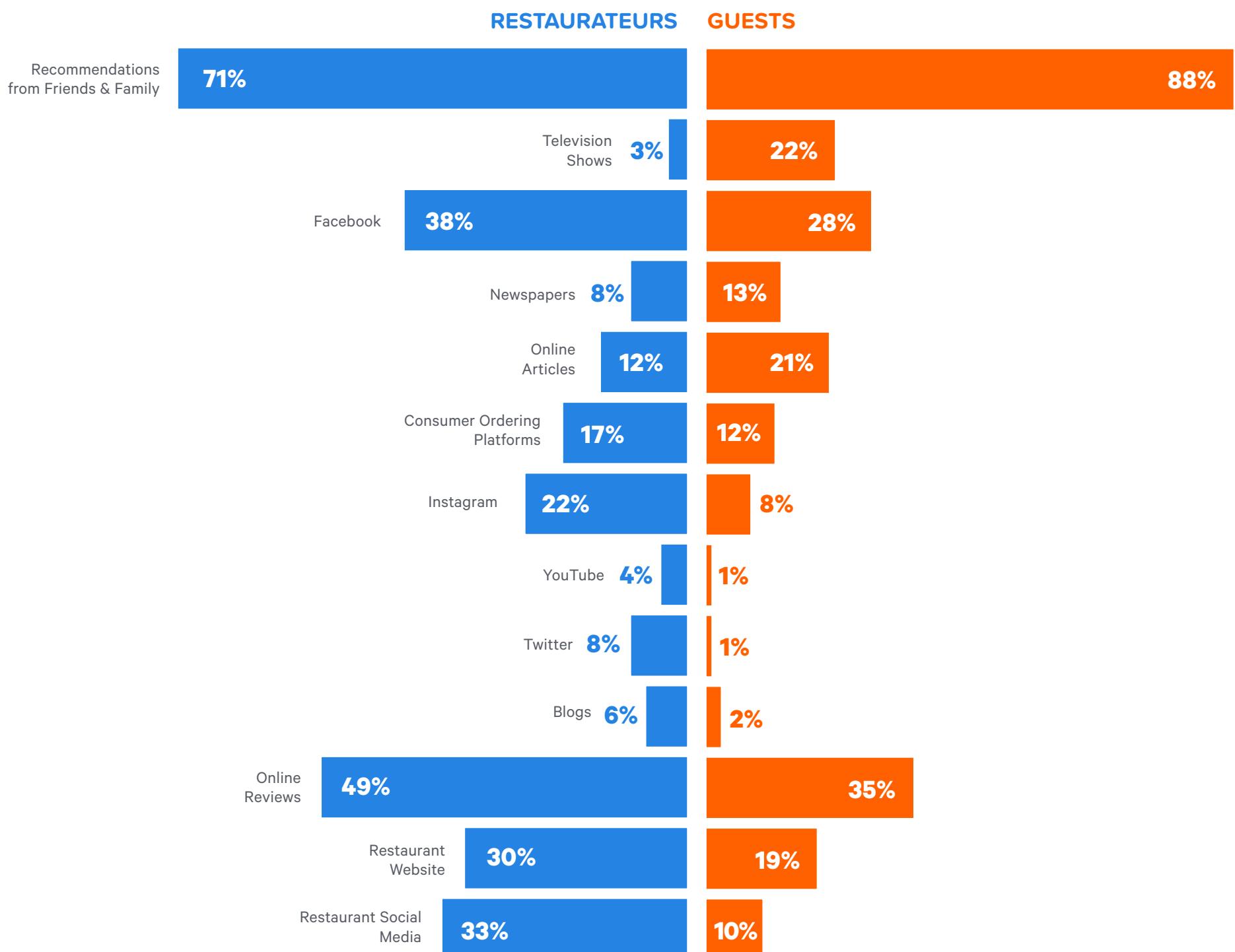
Next we diners how they choose a restaurant to dine at and restaurant professionals how they think guests find out about their restaurant. The graph to the right shows the differences and similarities between restaurant professionals' and guests' responses.

Guests and restaurateurs are very much aligned on one thing: They both understand the value of a personal recommendation. **71% of restaurateurs** guessed that their guests are influenced by friends and family recommendations, and guests confirmed it: **88%** said it was an important factor to them.

Restaurateurs somewhat overestimated the impact that Facebook has on diner decisions on where to eat. **Only 29% of guests** said it impacts their decision at all, but **39% of restaurateurs** thought it had more influence. This finding might inform how much energy or money restaurants spend on Facebook promotion – there might be **more effective ways** to draw in new guests.

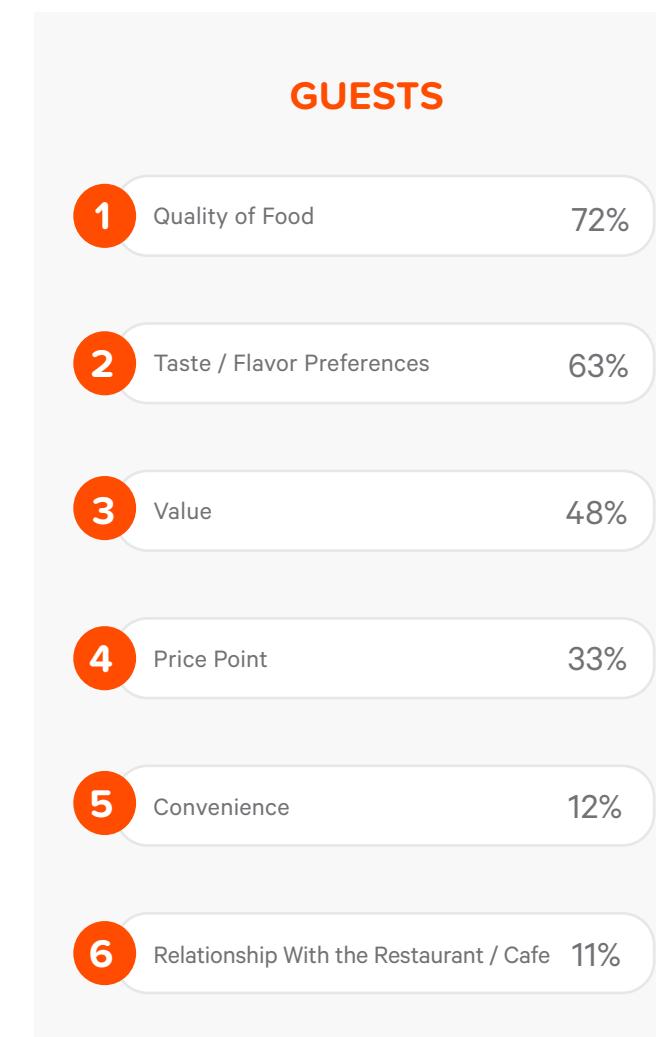
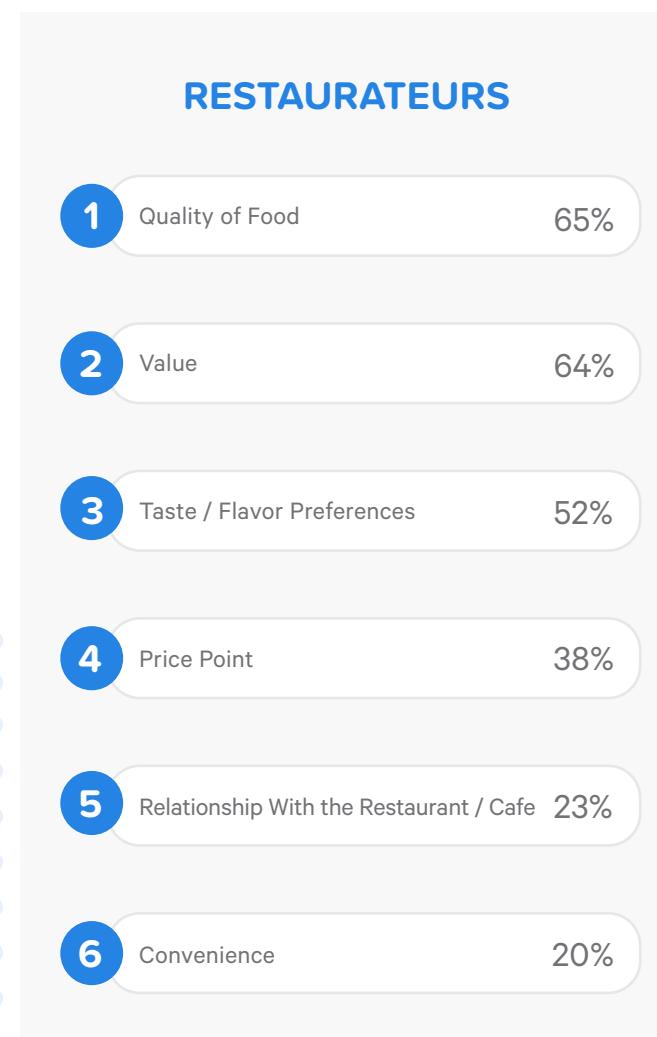
35% of guests said that online reviews factored into their decisions, but it looks like restaurateurs placed more weight on online reviews: **49% of restaurateurs** thought it had more influence. Restaurateurs know that online reviews can literally **make or break** their businesses – a **Harvard Business School study** showed that a one-star increase on Yelp can increase revenue by 5-9%.

HOW DO GUESTS CHOOSE A RESTAURANT TO DINE AT? GUESTS AND RESTAURATEURS SHARED THEIR THOUGHTS.



We asked *how* guests find restaurants, but also *why*. When it comes to choosing a restaurant, customers have tons of different factors to balance. Price-to-taste ratio? Different cuisines? Level of formality? General vibe? Health or dietary restrictions? The list goes on. Restaurateurs and diners both ranked

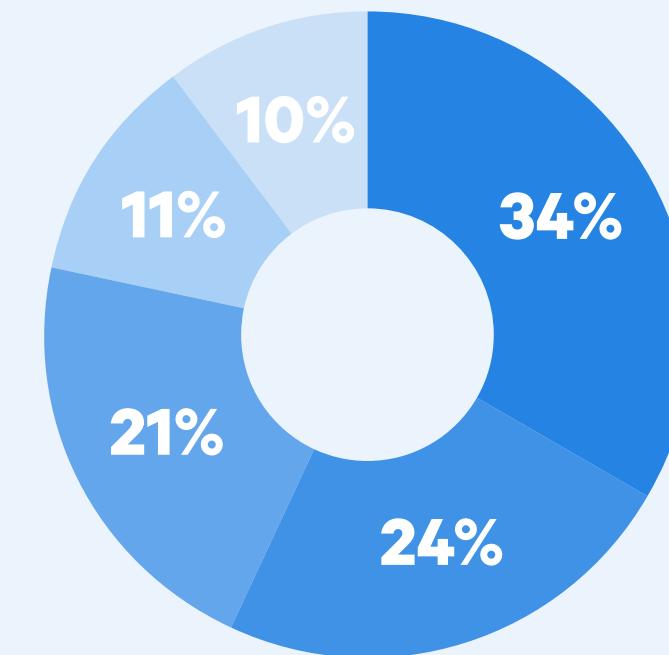
WHY DO PEOPLE CHOOSE ONE RESTAURANT OVER ANOTHER? RESTAURATEURS AND GUESTS WEIGH IN.



quality of food as the most important priority. But **64% of restaurateurs surveyed** thought **value** would rank very high on reasons to dine at a restaurant, when only **48% of guests** cited it in their top three reasons to choose a certain establishment.

Social Media

WHO AT YOUR RESTAURANT HANDLES ALL OF YOUR MARKETING CAMPAIGNS AND EFFORTS?



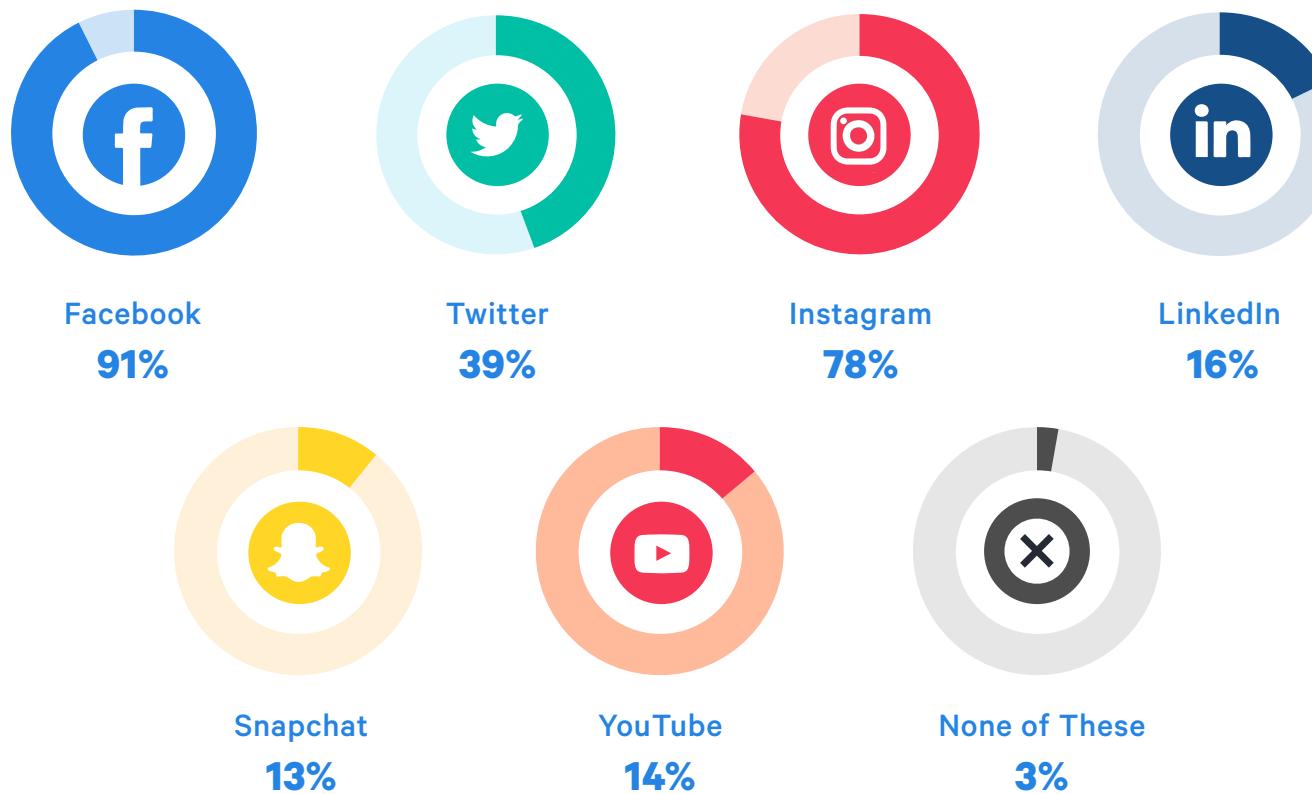
- 34% — A Dedicated Employee(s) Who Focuses on Marketing
- 24% — An Employee, Owner, or General Manager Who Mainly Has Other Responsibilities and Focuses a Small Amount of Time (Less Than 25%) on Marketing
- 21% — An Employee Who Devotes a Significant Portion of Their Time (More Than 25%) But Who Has Other Responsibilities
- 11% — My Restaurant Does Not Do Any Marketing
- 10% — I Don't Know

Restaurants in the U.S. have come to understand the value of marketing: The country has more than **660,000 restaurants**, and great food isn't always enough to stand out anymore. If you have great pictures of your menu's offerings and you post them across social media, you will catch the eye of many potential new customers. However, good food photos and catchy, memorable copy don't just come out of nowhere, so we wanted to find out exactly who's taking care of marketing for restaurants.

12% of restaurant professionals surveyed said they don't bother with marketing at all, but a surprisingly high percentage were at the other end of the spectrum: **34% said they have a dedicated employee** whose full-time job it is to market the restaurant. It's important to note that this question included marketing campaigns and efforts such as putting out advertisements, deciding on promotions, and managing social media accounts.

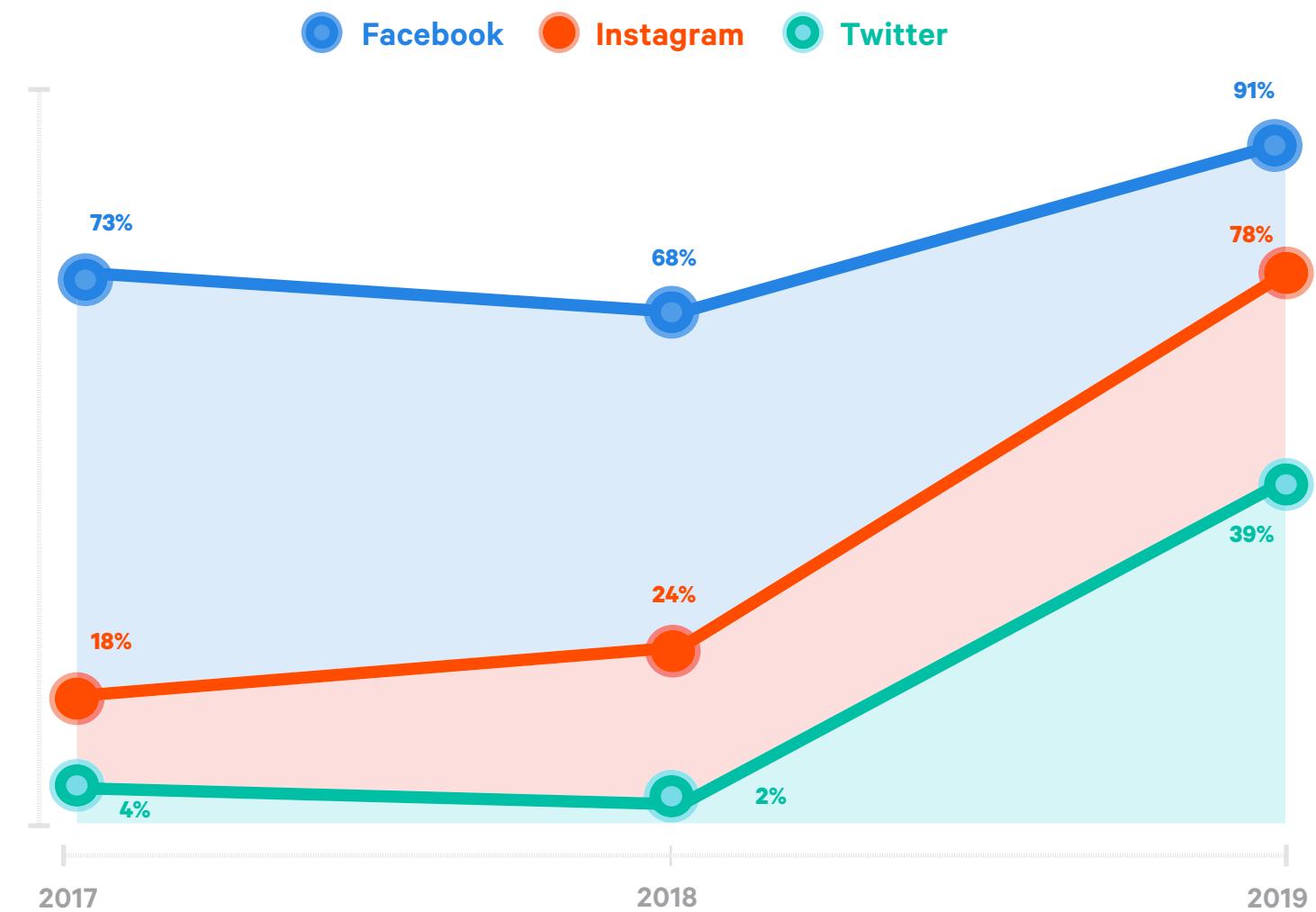
As much as social media can be fickle, if used well, there's great potential for it to drive impact for restaurants. Over the years, restaurateurs have learned to use social media more effectively, or have hired people to help with the task, and see it as a worthy time investment.

WHICH SOCIAL MEDIA PLATFORMS DO YOU USE TO MARKET YOUR RESTAURANT?



Restaurateurs have had a love-hate relationship with Facebook during the past three years. The platform's algorithm has undergone many changes that have affected how consumers see posts from pages, which may have contributed to the rocky relationships. In 2017, we reported that 73% of restaurateurs use Facebook for promotion, and in 2018, that number went down to 68%. However, this year **it's jumped back up to 91%**, as many restaurants treat their Facebook page as their website.

USAGE OF THE TOP THREE SOCIAL MEDIA PLATFORMS FOR RESTAURANTS OVER THE YEARS.



Instagram is showing a huge growth trajectory in popularity with restaurateurs. In 2017, only 18% of restaurateurs used Instagram to promote their businesses, and in 2018, it grew to 24%. In 2019, **that number has skyrocketed to 78%**.

Twitter, the third-most-popular option, saw similar rapid growth in its use, increasing from 4% in 2017 and 2% in 2018 to a whopping 39% in 2019.



While it's free to use these sites, many restaurants also pay to advertise their businesses — on social media and elsewhere. Options vary widely in cost and effectiveness. For example, partnering with a community event or a charity may cost more than

boosting a few social media posts, but it may leave a lasting impression on a restaurant's guests in the area — which could be why **53% of restaurateurs surveyed** mentioned community events as a promotion method they plan to use in 2019.

?

WHICH OF THESE ADVERTISING AND PROMOTION METHODS WILL YOUR RESTAURANT PAY FOR IN 2019?

Social Media Ads

67%

Google/Search Engine Ads

42%

**Newspaper/
Magazine Ads**

32%

Community/Event/Charity Sponsor

53%

**Public Relations/
Agency Partnerships**

24%

Television Ads

11%

Direct Mail Ads

22%

Other
5%

**None of
These**
4%

Radio Ads **2%**

Billboards **1%**

Online Ordering

Online ordering is an important part of doing business in 2019. With increased convenience in every area of our lives, more and more diners are

choosing to forgo the atmosphere of a restaurant for the comfort of their homes, but they still want to eat food from restaurants.

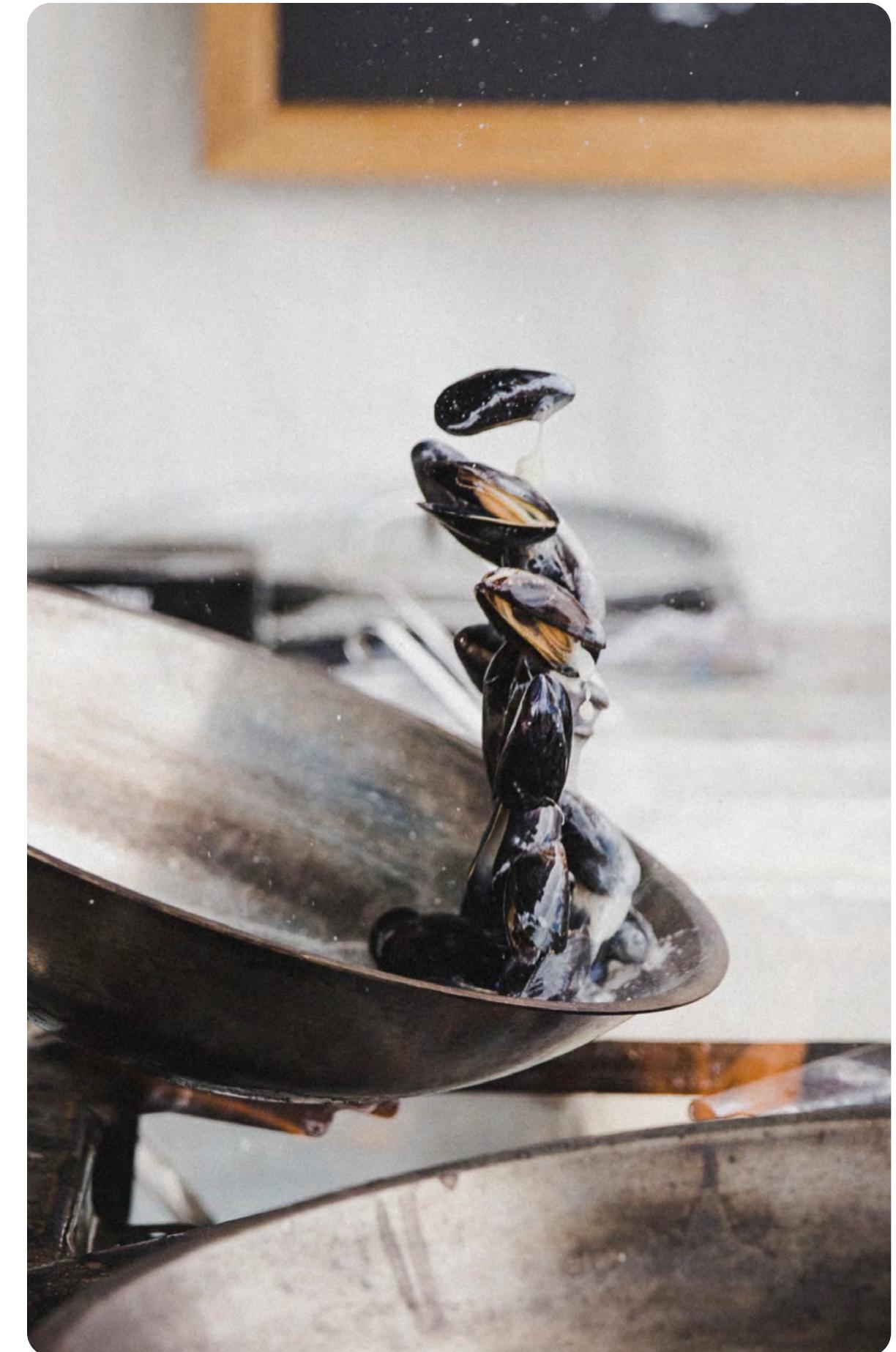
WHICH OF THE FOLLOWING HAVE YOU USED TO PLACE AN ONLINE ORDER FROM A RESTAURANT IN THE PAST MONTH?



51% of diners ordered directly from a restaurant's website in the past month, which is a form of online ordering that's most beneficial for a restaurant, because while restaurants have to pay a delivery driver, they don't have to give any fees to an online ordering aggregate site.

Speaking of those sites, **38% of guests** used an online ordering aggregator like Doordash or Grubhub in the past month. Apps like these have

been changing the takeout and delivery game. Third-party apps have grown in popularity, but so have restaurant-specific apps, especially for fast casual chains like Sweetgreen. Getting an app developed for your restaurant may not be viable for a small restaurant with one location, but if you franchise, it could be a boon to your business. The majority of diners are ordering online a couple times a month and looking for a variety of pickup and delivery options.



Customers are platform-loyal.

One of the trends this study points out is the difference between restaurants and customers regarding third-party delivery apps. It shows that customers are platform-loyal, making it extremely important for restaurants to be represented across multiple third-party delivery platforms.

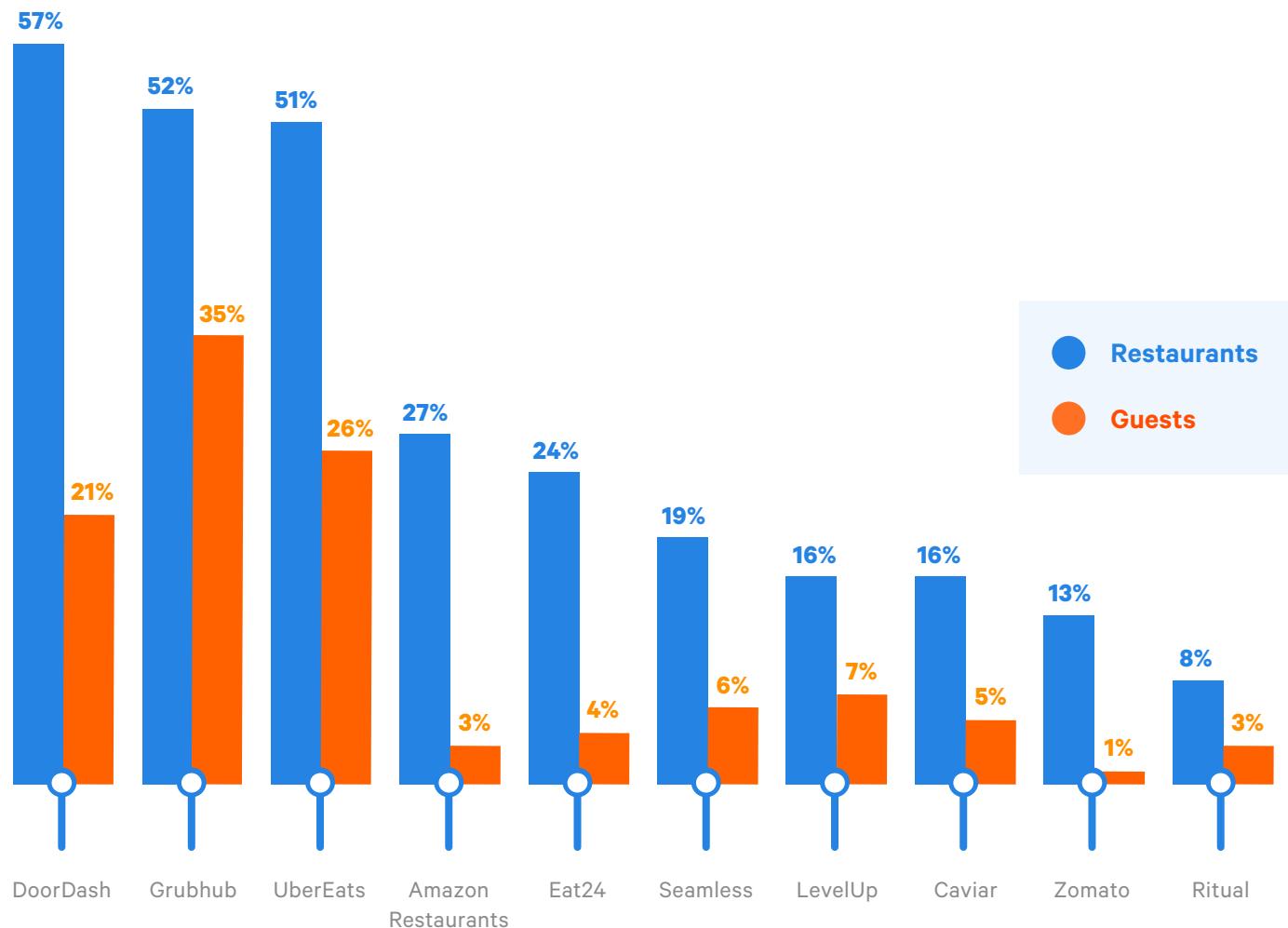
This not only diversifies the restaurants' customer bases, it also has been shown to have a direct correlation with an increase in revenue.



Sterling Douglass
Chowly CEO and Founder



WHICH ONLINE ORDERING PLATFORMS ARE YOU USING NOW?

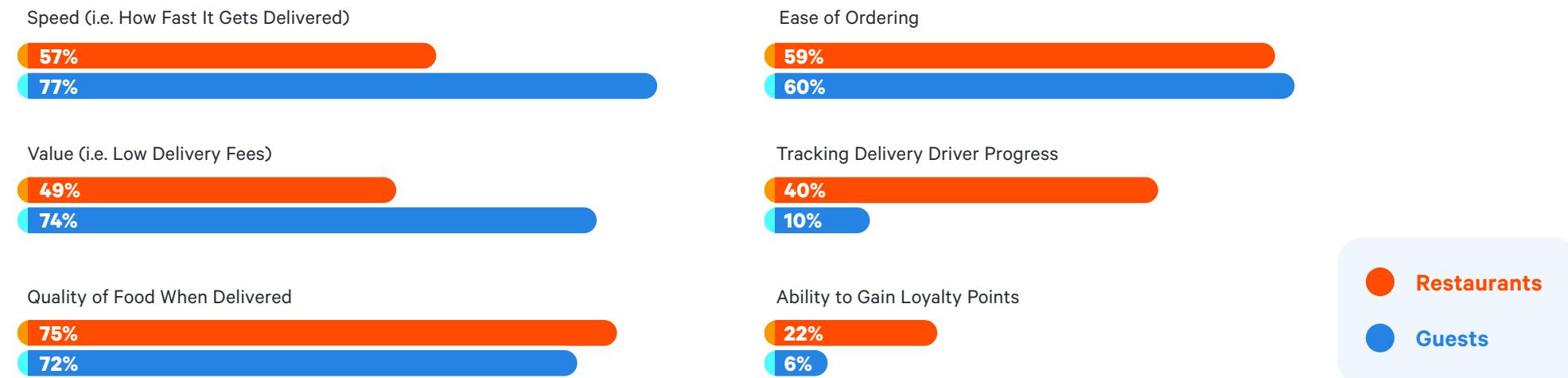


In the past year, guests ordered most on **Grubhub** (35%), **UberEats** (26%), and **DoorDash** (21%), and those three have also been the most popular with restaurateurs. The smaller sites and apps seem to be getting pushed out by these three giants, but restaurateurs still do use the less-popular sites, like Zomato and Amazon Restaurants, slightly more than diners do. It's important to note that site popularity varies regionally.

Since each online ordering system charges a fee for delivery, ranging in size, it makes sense to do a little research: ask your diners which ones they use, and stick to those.

There are many factors that go into making food delivery a good experience, and restaurant professionals and diners value these factors differently.

WHAT ARE THE MOST IMPORTANT FACTORS WHEN IT COMES TO ONLINE ORDERING FOR DELIVERY?



Restaurateurs might be interested to know that their guests care about speed over everything else. Yes, you read that right: **Delivery diners care more about the speed of arrival than the quality of the food.** 57% of restaurant professionals guessed that speed would be one of the most important aspects of delivery, but 77% of guests ranked it as most important for them.



Restaurant Marketing Success Kit

- [2019 RESTAURANT MARKETING PLAN TEMPLATE →](#)
- [HOW TO BUILD AN OBSESSION-WORTHY RESTAURANT BRAND →](#)
- [RESTAURANT SOCIAL MEDIA MARKETING IDEAS →](#)
- [WORST MISTAKES WHEN MARKETING FOR RESTAURANTS →](#)



CHAPTER FOUR

During the Restaurant Experience

Providing Best-in-Class Service with Technology



37% of restaurants already display nutritional information on their menus, while 36% plan to start.



36% of guests opt for digital receipts (either text or email), and more than 50% of restaurants offer them.



46% of restaurant professionals marked handheld POS systems as extremely important to their strategy, and 20% of guests think it's extremely important to their guest experience.

Ordering From the Menu

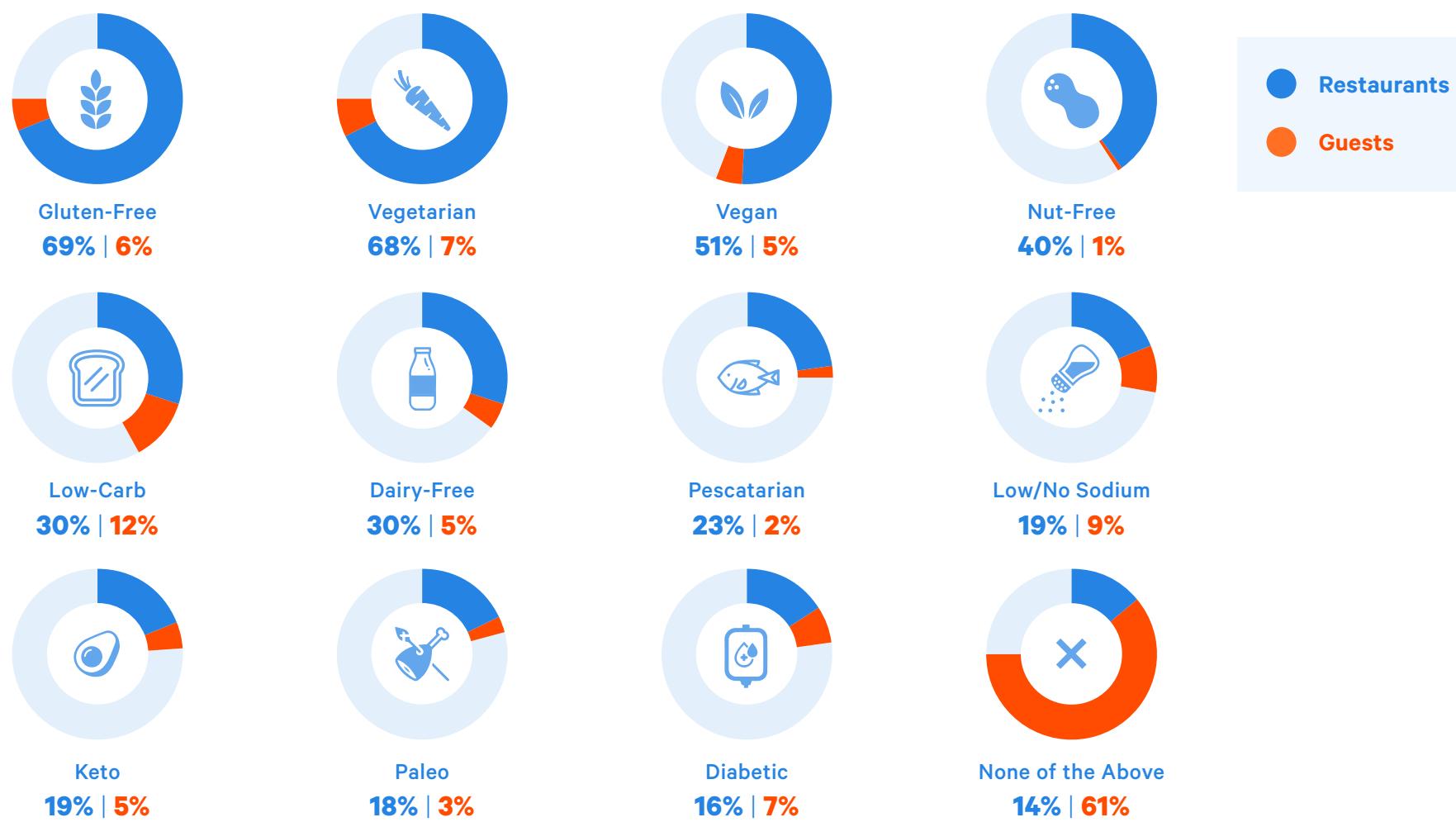
When you sit down at a restaurant or walk up to the counter, what's the first thing you look for? The menu. The menu says everything about a restaurant.

When browsing a menu, guests are becoming more health-conscious: 43% of Americans claim to always be on the lookout for healthy options when shopping for food, while 52% said they were at least sometimes scouting

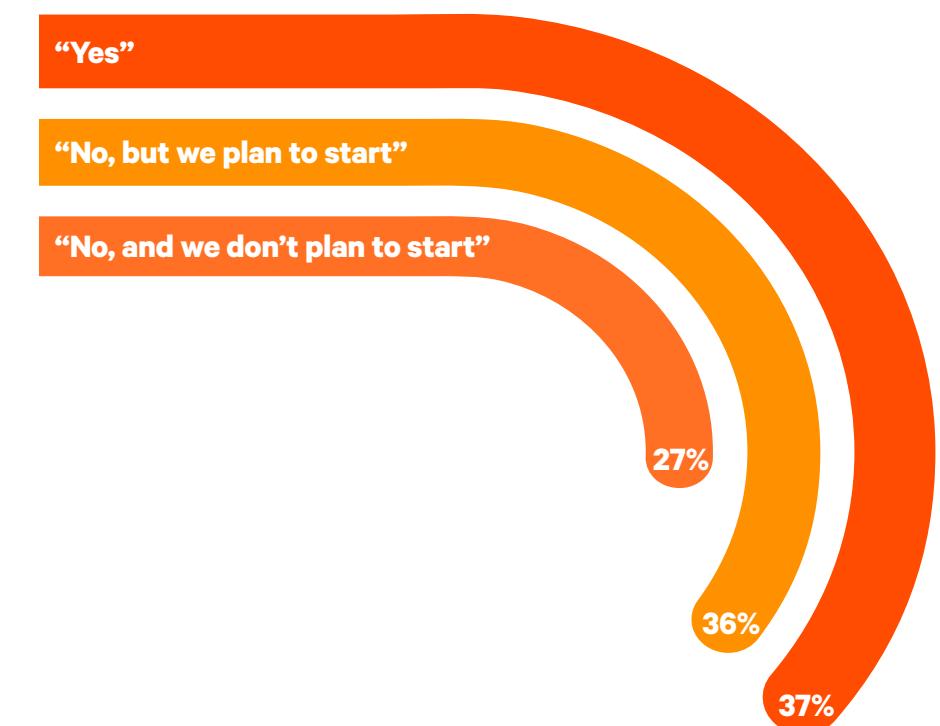
for healthy foods, according to the **International Food Information Council**.

We asked restaurant professionals whether they have menu items that cater to popular dietary restrictions, and we asked guests to select which dietary restrictions they have.

WHICH DIETARY PREFERENCES DO YOU HAVE (GUESTS) VS. DO YOU HAVE MENU ITEMS THAT CATER TO THE FOLLOWING DIETARY PREFERENCES (RESTAURANTS)?



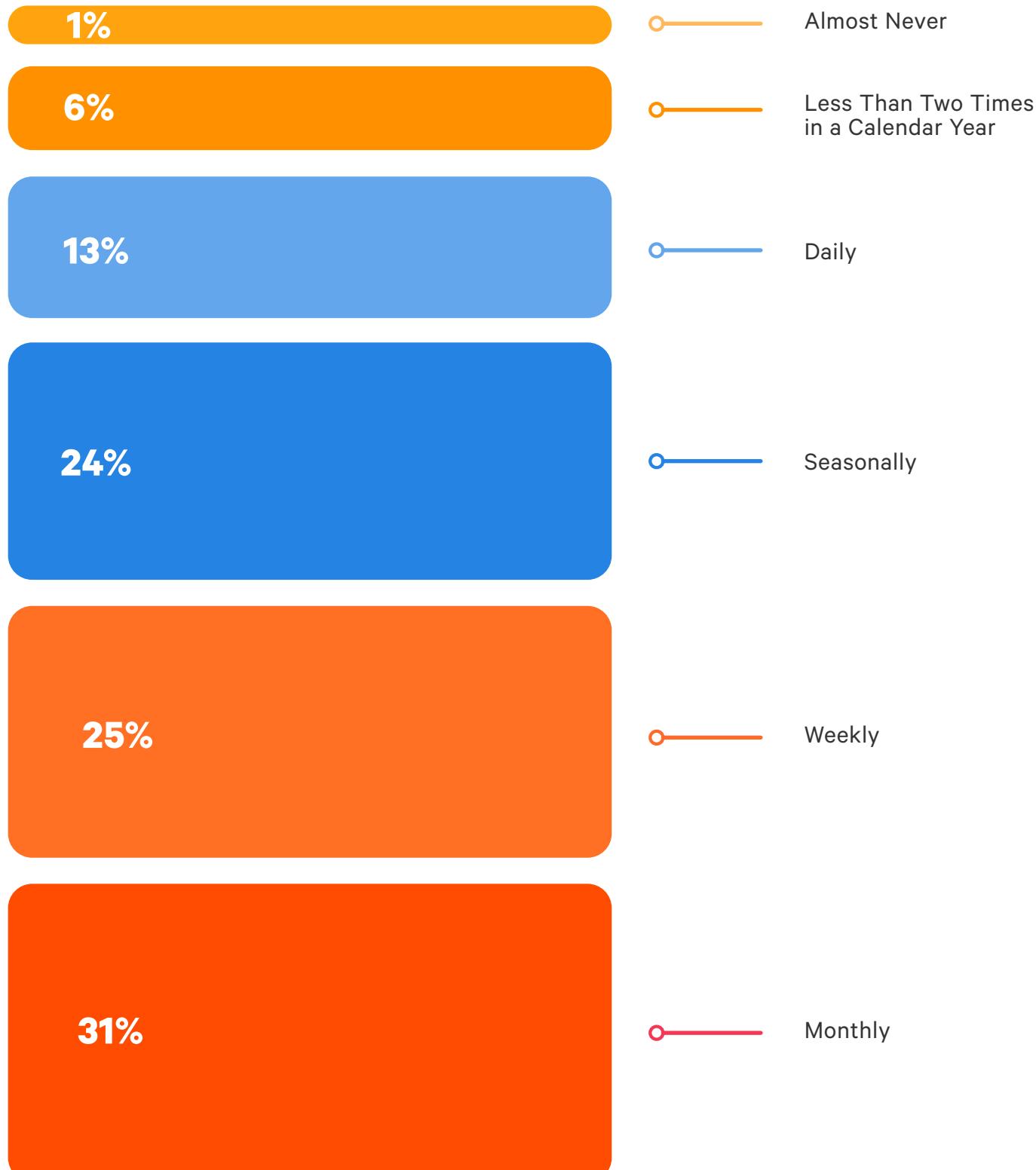
DO YOU DISPLAY NUTRITIONAL INFORMATION (E.G. CALORIES) ON YOUR PRINTED OR DISPLAY MENUS?



Restaurants are on the **vegetarian** and **gluten-free** trends, but they could focus more on **low-carb** and **nut-free** food trends. Interestingly enough, **61% of guests said they do not have a preference**.

For restaurants that are part of a chain with 20 or more fixed locations, **menu labeling laws** require them to display calorie counts on their menus. However, some restaurants with less locations are also following this trend. **37% of restaurants** already display nutritional information on their menus, while **36% of restaurants** plan to start.

HOW FREQUENTLY DO YOU UPDATE YOUR MENU?



Why do chefs update their menus? Often, the reason is to include seasonal ingredients, but it might also be to change design, update prices, and revise menu descriptions.

We asked restaurant professionals how often they update their menus in their POS systems, and the answers varied. The largest majority (31%) update their menus **monthly**, while 25% update their menus **weekly**, and 24% update their menus **seasonally** or every few months.

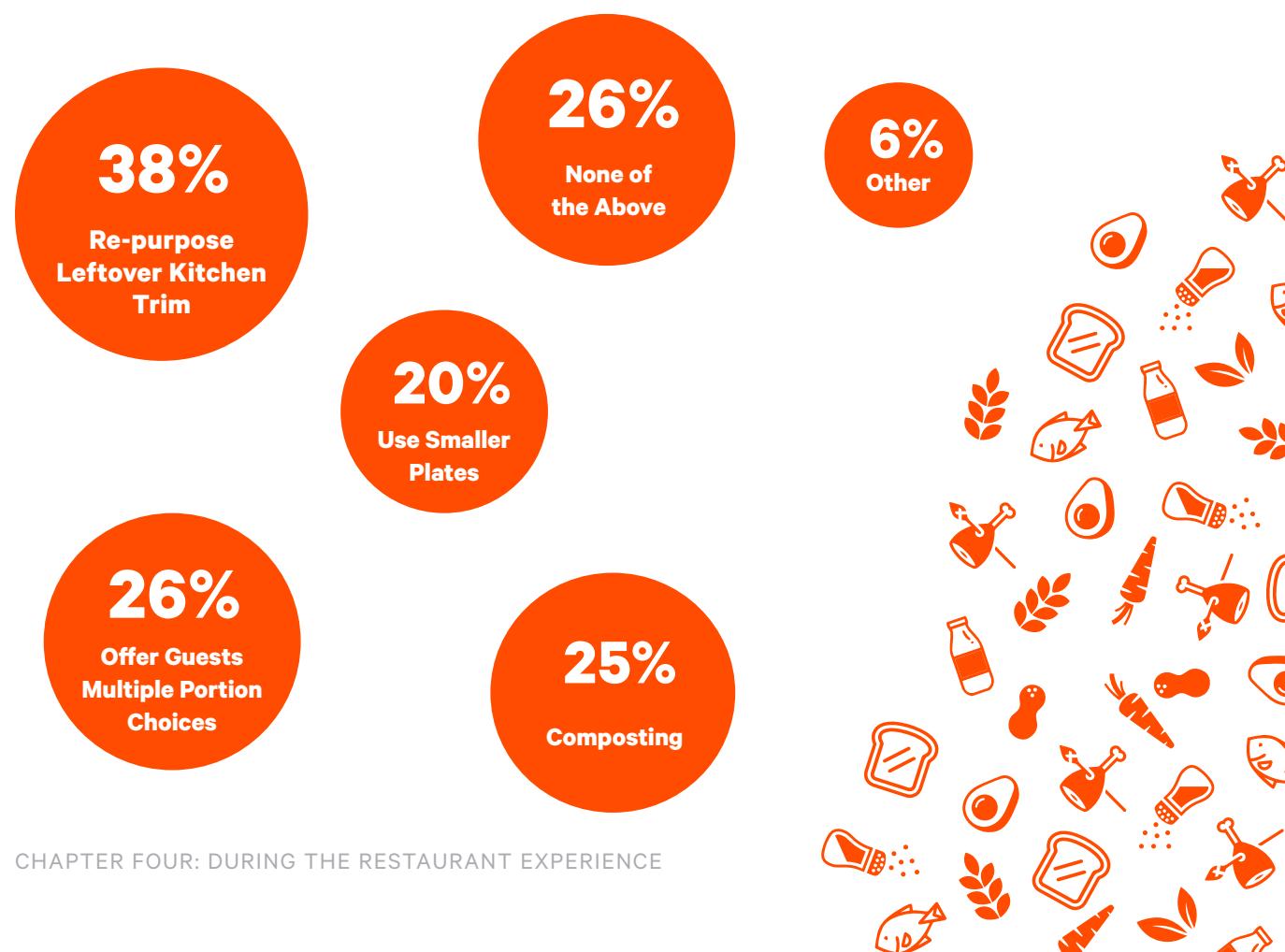
Once an order advances from the table to the kitchen, what happens? **27%** of the time, the order flows automatically to a kitchen display screen in the back of house. However, **47% of restaurants** still use printed paper tickets, or chits, and **14% actually handwrite their tickets**. **10% communicate to the kitchen verbally**, and one restaurateur even answered that they memorize orders that come through.

Speaking of the back of house, there is a movement to curtail waste in the restaurant industry. We asked restaurant professionals to share how they're reducing food waste in 2019. The most common method was re-purposing leftover kitchen trim: **38% of restaurant professionals will use leftover ingredients from one recipe in another.**

Some attempt to stop the problem at the guest level. **26% of restaurants** offer multiple portion choices for guests, so they don't send superfluous food back to the kitchen.

One-quarter of restaurants compost, which is a trend we'll be watching closely, and 26% of restaurants don't do anything at all. Other restaurateurs cited limiting the number of items prepared for service, offering an a la carte menu, and cross-utilizing ingredients as methods of reducing food waste.

HOW DO YOU REDUCE FOOD WASTE IN YOUR RESTAURANT?



Food waste is a perpetual problem for restaurants.

While you can't control what a guest might eat or leave behind, you can control your inventory. Keeping close tabs on what's on your shelves can help reduce spoilage and minimize over-ordering, which are key to keeping waste to a minimum.



John Enny
xtraCHEF Chef de Marketing

Technology

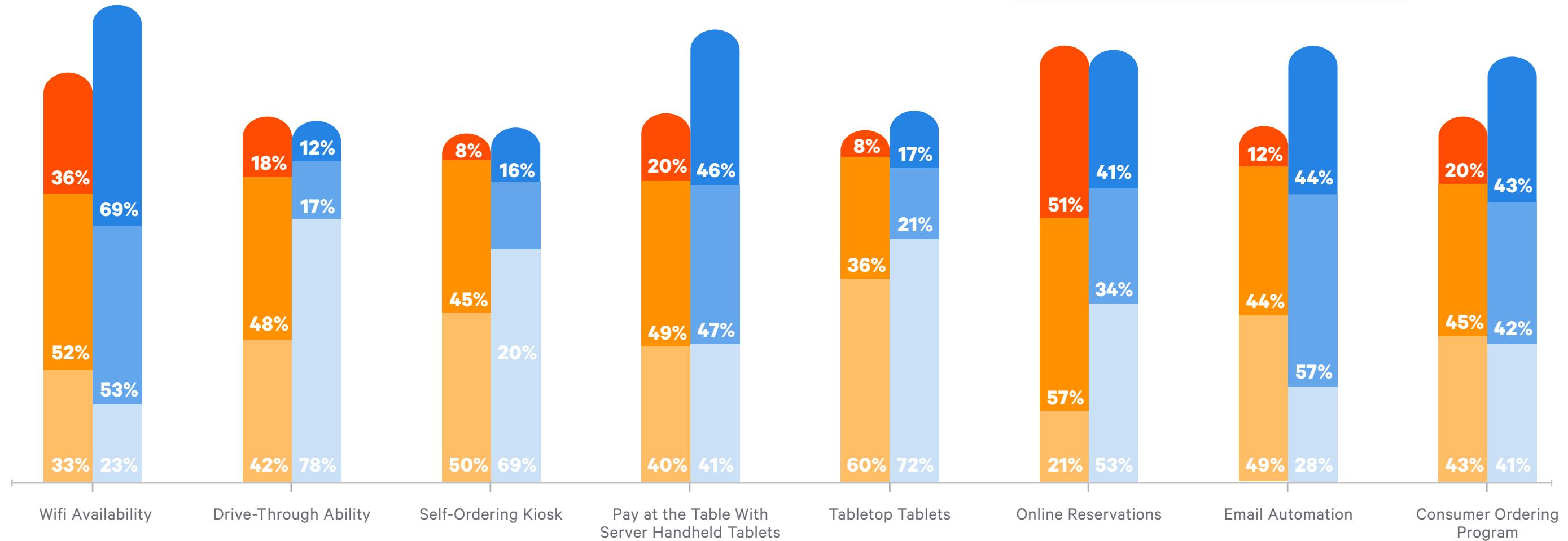
In 2019, guests are expecting more convenience when it comes to their guest experiences, and restaurateurs are scrambling to keep up.

The most important restaurant technology feature for guests is **online reservations**, with 51% marking it as extremely important (6 or 7 on a scale of 7). The most important restaurant technology for restaurants is **wifi availability**, with 69% marking it as extremely important. While there is a **movement to ban cell phones at some restaurants**, others embrace the instant gratification when guests post on social media from their table.

HOW IMPORTANT ARE THESE RESTAURANT TECHNOLOGIES TO YOUR GUEST EXPERIENCE OR YOUR RESTAURANT STRATEGY?

● Restaurants ● Guests

*Shade of respective color darkens with importance



Bring the magic of hospitality to every dining experience.

We're seeing restaurants use data from many different sources to personalize every part of service, from the host stand to the kitchen. Connecting the dots between information across restaurant technologies – including reservations, guest profiles, POS, CRM, email, and more – helps restaurants run smoothly

and allows them to bring the magic of hospitality to every dining experience.



Joseph Essas
OpenTable Chief
Technology Officer



Another technology that stood out as important for both groups was online reservations: **51% of guests** marked it as extremely important, while **41% of restaurant professionals** marked it as extremely important (though that number may be higher for full-service restaurants). The ability to reserve a table

online is ubiquitous — Google, Instagram, Facebook, and other social platforms offer direct booking online by integrating with reservation technology — and it's the number one action many fine dining and casual dining restaurant professionals hope diners will take online.

When it comes to **handhelds**, **20% of guests** think it's extremely important to their guest experience. They experience faster turnaround times for their food and drink orders, and they can pay, sign, and tip with the tap of a button. **46% of restaurant professionals** marked handhelds as extremely important to

their strategies, and 47% of restaurant professionals marked them as somewhat important. Handheld tablets send orders instantly to the kitchen, improving throughput, and give staff notifications when orders are ready, allowing them to spend less time running back and forth to the kitchen and more time with guests.

Payments

While most restaurants process credit cards — though some still require guests to take out money from an ATM — the payments industry is slowly shifting. **McKinsey** reported that digital payment use is highest among younger

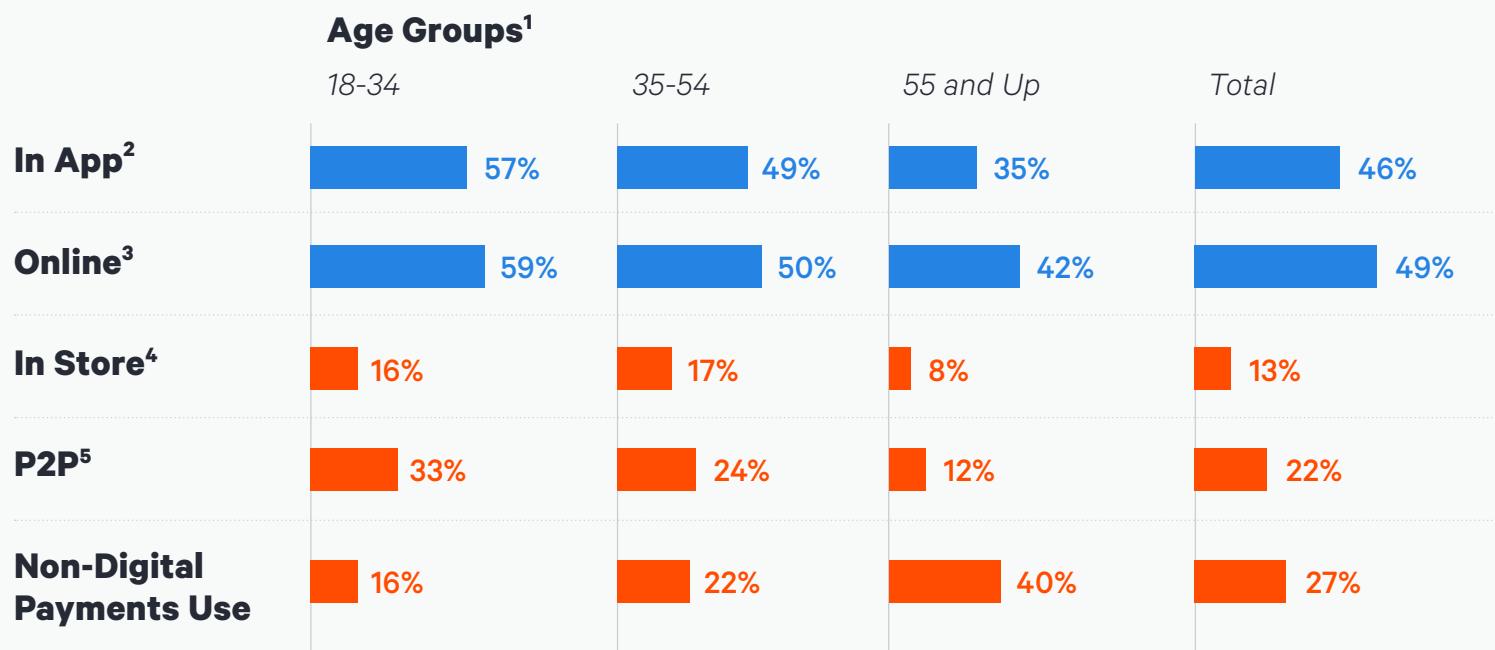
users: **57% of adults** aged 18-34 buy things using an app on their device, **59%** buy things through a website on their device, and **16%** use their device to pay by interacting with a terminal.

SOURCE

In the US, digital payment use is highest among younger users, especially for in-app and online payments.

In the past 12 months, have you performed any of these activities?

% of respondents, U.S.



¹ N= 18-32 (283); 35-54 (396); 55 and Up (422); Total (1,101).

² Buy things and/or pay for services using a retailer's app on my device (e.g., Amazon, Starbucks, Uber).

³ Buy things through a website on my device (e.g., Target.com).

⁴ Use my device to pay at retail locations by interacting with a terminal (e.g., Apple Pay, Android Pay, Samsung Pay, LevelUp).

⁵ Transfer money to friends, family, or acquaintances through an app (e.g., PayPal, Venmo, Square Pay).

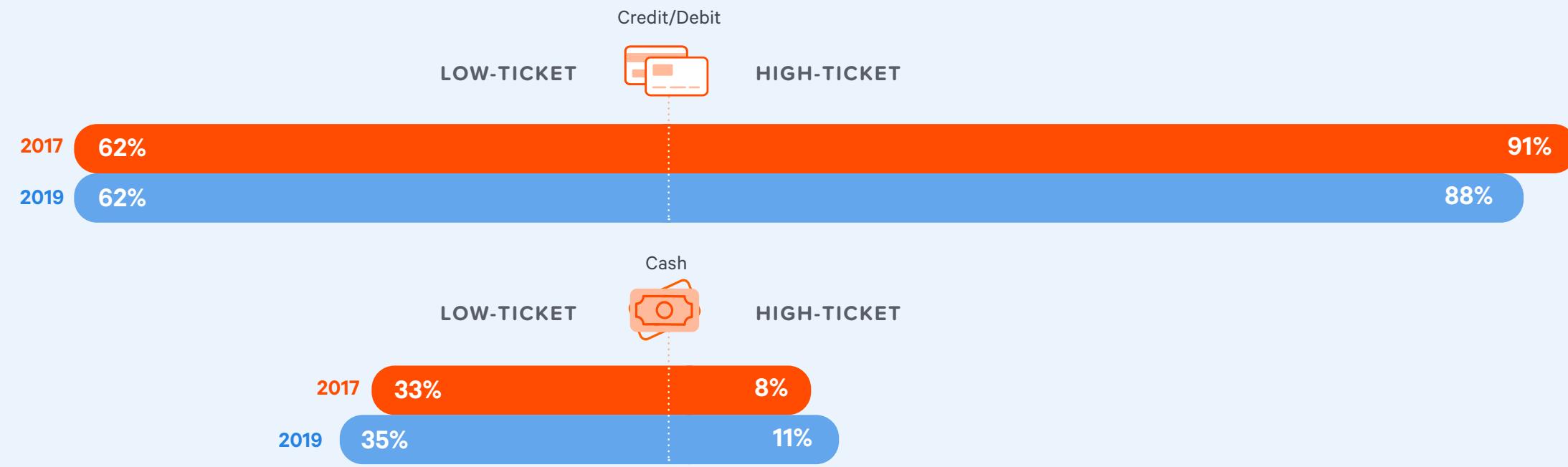
Source: McKinsey Digital Payments Survey, 2016.



We asked guests how they would most likely pay at a restaurant for high-ticket and low-ticket items, and it seems credit/debit is king: **88% prefer to pay for high-ticket items with credit/debit**, and 62% prefer to pay for low-ticket items with credit/debit.

At Toast, we predicted the number of cash transactions would decrease, but it seems it's stayed steady and even somewhat increased over the years. Conversion to mobile payments doesn't happen overnight; it can take decades. On the right is a comparison of data from 2019 and 2017.

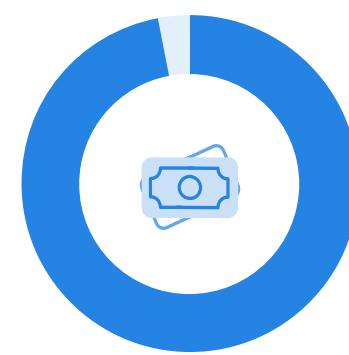
HOW ARE YOU MOST LIKELY TO PAY FOR A LOW-TICKET ITEM AT A RESTAURANT (LESS THAN \$20) VS. A HIGH-TICKET ITEM (GREATER THAN \$20)?



WHICH PAYMENT OPTIONS DO YOU OFFER AT YOUR RESTAURANT?



Credit/Debit
97%



Cash
97%



Mobile Pay
31%



Check
25%



Venmo
4%

However, restaurant professionals are becoming more aware of mobile payment trends. While a small percent of guests are using mobile pay, a significantly larger portion of restaurants — 31% — are offering it as an option. Over time, perhaps adoption will increase.

Other interesting trends are Venmo payments — **Venmo integrates with Grubhub ordering** — and check payments — which is an interesting use case, as restaurants would have to pay for a check verification service, and any bounced checks would cost them money.



Have a direct digital relationship with customers.

It's vital for today's restaurants to have a direct digital relationship with their customers. While third party delivery continues to grow and can bring new customers to the business, brands need to focus on how to better retain margins, understand who their customers are,

and engage with them in a way that can drive customer frequency and strengthen brand loyalty.

Beyond incremental sales, as hiring becomes more difficult and minimum wage continues to increase, digital

ordering also allows businesses to re-allocate staff to focus on order making instead of order taking — helping increase throughput and improve customer satisfaction. A happy customer who can order easily will be a returning customer.



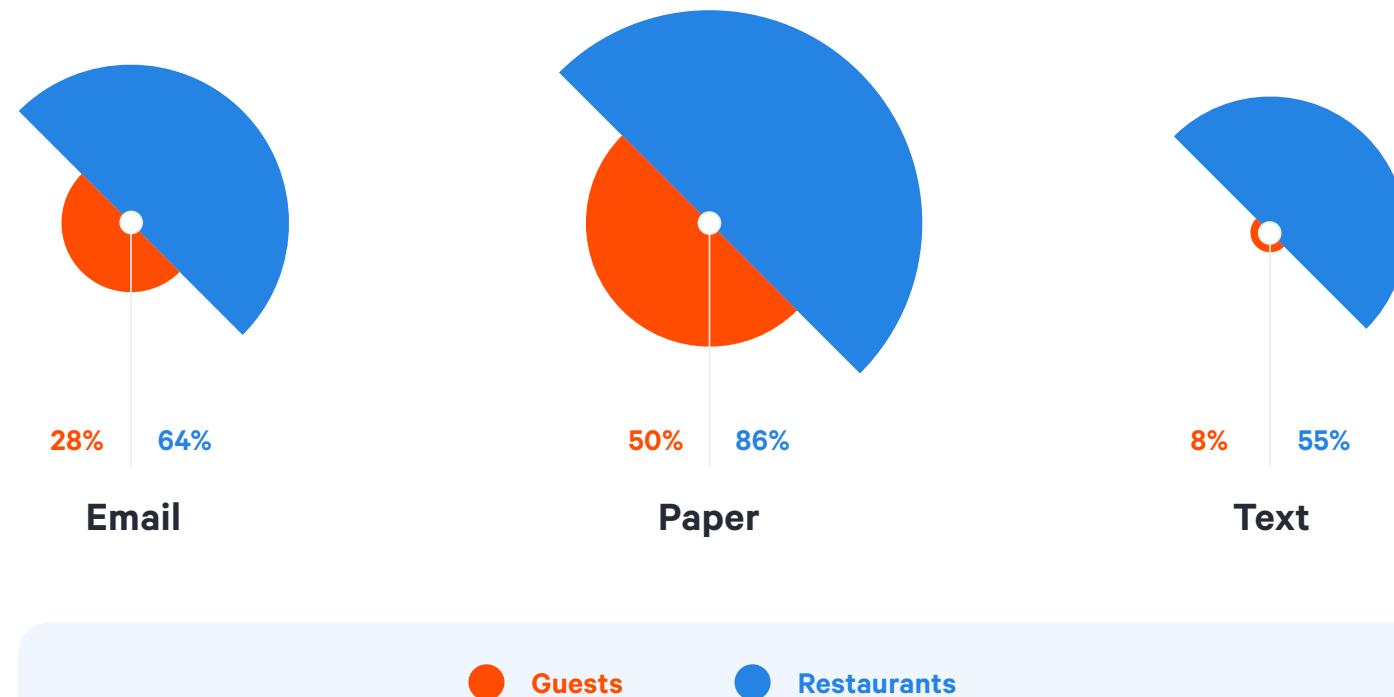
Adam Garfield
SpeedETab
Co-Founder and CEO

Receipts

Finally, the receipt. Digital receipts are becoming more and more convenient for guests, especially in fast casual atmospheres. Restaurants are also finding that **receipt marketing** can grow loyalty, social media followers, online ordering programs, positive reviews, and more.

50% of guests still prefer to receive paper receipts, while 36% are opting for digital receipts (either text or email). 14%

HOW GUESTS PREFER TO RECEIVE RECEIPTS VS. RECEIPT OPTIONS RESTAURANTS OFFER.



Finally, we asked restaurant professionals **“If you could wave a magic wand, what technology would you create to support your restaurant?”** Here are the top ten repeated words in those responses:

- | | | | |
|---|-----------|----|----------|
| 1 | POS | 6 | Software |
| 2 | Inventory | 7 | Payroll |
| 3 | Robot | 8 | App |
| 4 | System | 9 | Invoice |
| 5 | Order | 10 | Employee |

Themes that emerged were:

- Robots — to wash dishes, recognize guests with artificial intelligence, and serve food
- Payroll with break time, tip pooling, etc.
- Combined, all-in-one software for payroll, POS, inventory, and more
- Real-time wait time technology for guests
- Digital training programs for staff
- Sales forecasting and predictions
- Live inventory tracking
- Drone delivery

Customers no longer have the patience for waiting.

The largest push for mobile payments in 2019 is coming from restaurant patrons. Customers no longer have the patience for waiting. They want a fast and easy dining experience, and if you can't provide that for them, they will find another restaurant that can. In a recent hospitality industry study, 67% of restaurant patrons stated that they "craved convenience and were always looking to use the fastest and most convenient payment option available.

With mobile payments, you can create the ideal experience for your customers. Mobile payments are more secure and can provide you with crucial data for survival and growth in one of America's most competitive business landscapes. More and more restaurants are embracing Rooam's mobile payment technology, allowing guests to simply pay their checks and bar tabs from their mobile phones and leave on their own time.



Junaid Shams

Rooam CEO and Co-Founder



Restaurant Technology Success Kit

- **RESTAURANT TECHNOLOGY ROI CALCULATOR** →
- **FOOD COST CALCULATOR** →
- **THE FUTURE OF THE RESTAURANT INDUSTRY** →
- **SUSTAINABLE TECHNOLOGY TO REDUCE PAPER AND FOOD WASTE** →

CHAPTER FIVE

After the Restaurant Experience

Evaluating Guest Satisfaction and Encourage Repeat Visits

After a guest leaves the restaurant, the work doesn't end for restaurant professionals — their next task is to encourage that guest to return again and again. We'll talk about three ways to do that — email, loyalty, and gift cards — and share restaurant professionals' best practices for collecting guest feedback.





31%

of guests said they'd be happy to receive emails from a restaurant once a week.

25%

of guests said loyalty programs are extremely important to their guest experience.



69%

of restaurant professionals are now using digital gift cards, either via text or email.

24%

of restaurant professionals said loyalty programs are extremely important to their retention strategy.

Email

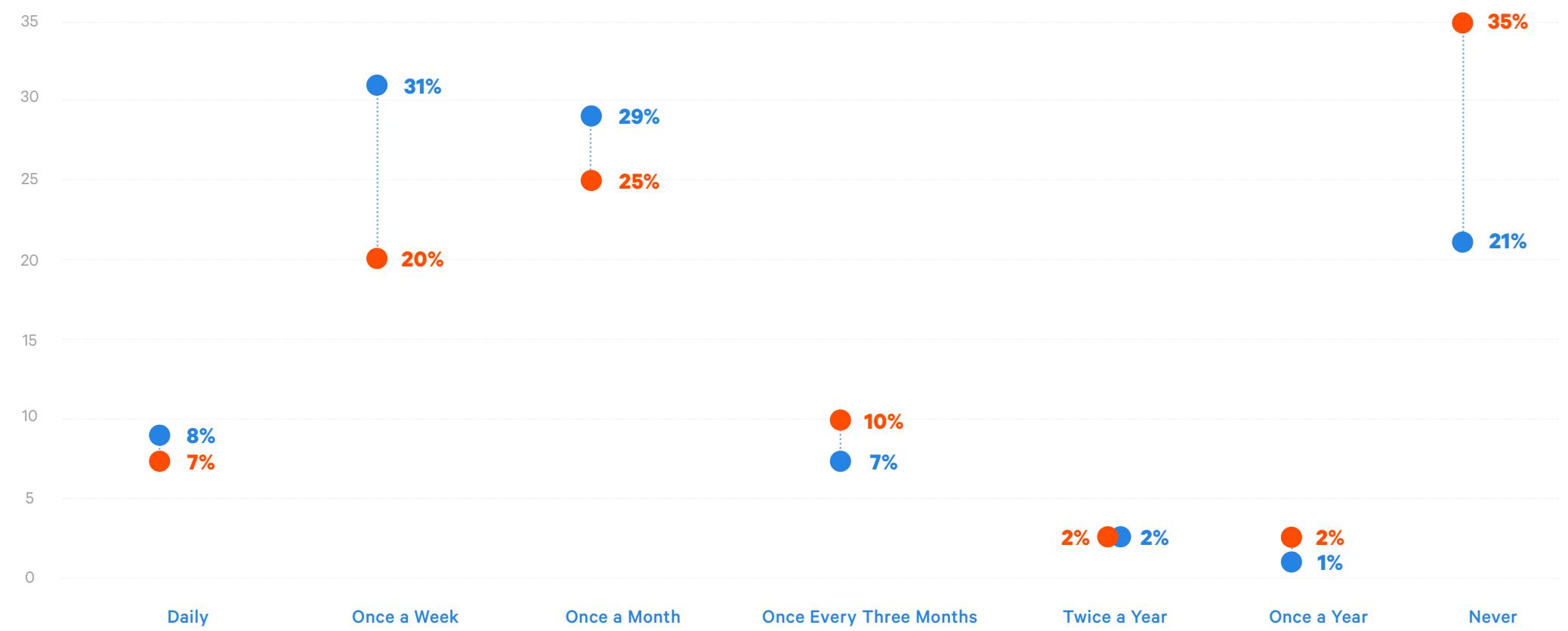
Once restaurateurs have collected emails from their customers (through **digital receipts, loyalty programs, or comment cards**), they need to decide what to do with them. Email marketing can be effective if done well, but as soon as a person feels their inbox is being flooded with emails that aren't particularly interesting or useful, they'll unsubscribe, and there goes the opportunity to keep in touch. One way to prevent unsubscribes is to send emails sparingly, but the jury's still out on what exactly constitutes "too much."

31% of guests said they'd be happy to receive emails from a restaurant once a week, and another 29% said they only wanted to hear from a restaurant once a month.

It's also important to note that **21% of guests don't ever want to hear from a restaurant**, so it's a good idea for restaurateurs to have an opt-in option on whatever form a guest submits their email.

HOW OFTEN DO YOU SEND EMAIL VS. HOW OFTEN DO YOU WANT TO RECEIVE EMAIL?

Guests Restaurants

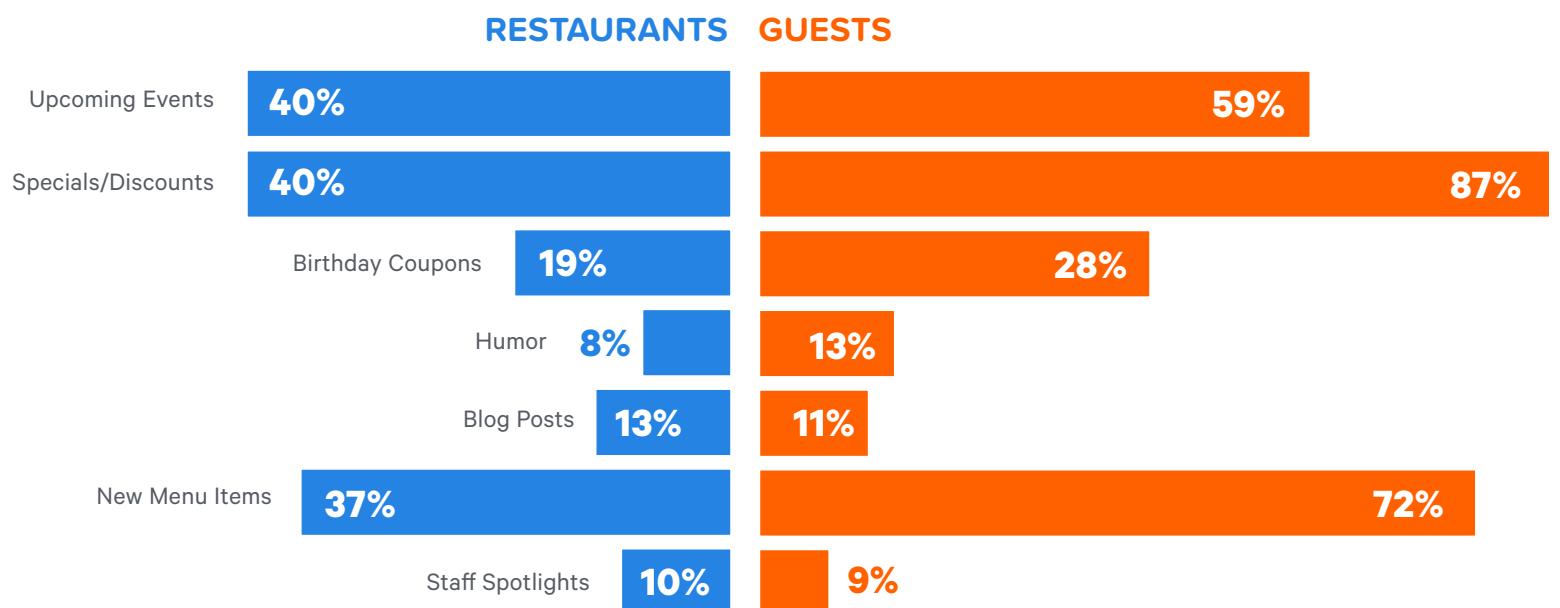


The content of a marketing email is the most important part, of course, even above frequency and timing, and different message types are valued differently by each group.

40% of restaurant operators fill their marketing emails with news about upcoming events, specials, and discounts. 37% send emails about new menu items, and another 19% send birthday coupons.

87% of guests said they loved hearing about specials and discounts – this is by far the safest bet when sending out emails. 72% of diners like to hear about new menu items, and 60% care about special events. 47% of diners said they're happy to receive birthday coupons.

WHAT RESTAURANT EMAIL DO YOU SEND VS. WHAT RESTAURANT EMAIL DO YOU THINK IS IMPORTANT?



Email marketing is a robust part of an omnichannel strategy.

The data is showing us that email marketing is becoming more and more appealing to customers, and it's all thanks to sophisticated data collection tools and the ability to personalize messages. The ability for restaurants to promote new menu items or send out special discounts that cater to a diner's specific

tastes has totally changed the game. There's no longer a need to bombard customers with a one-size-fits-all email blast, and we can see here that diners aren't paying attention to that anyway. With the right cloud-based technology in your POS, you can send targeted messages to the right customers at the right moment,

and that makes email marketing a robust part of an omnichannel strategy.



Yair Hottzer

Como USA Founder and President

Guest Loyalty

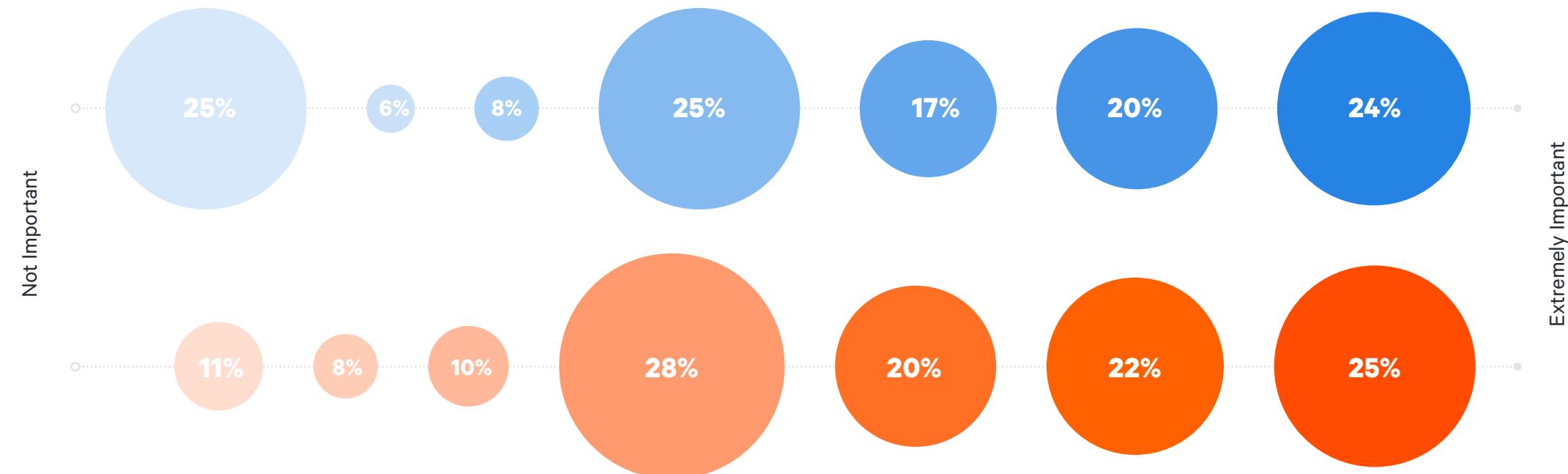
The best way to attract repeat guests is to create a restaurant loyalty program strategy that includes points, tiers, and, of course, rewards. Restaurant professionals and guests are in agreement: **25% of guests** said loyalty programs are extremely important to their guest experiences, and **24% of restaurant professionals** said they're extremely important to their retention strategies.

The takeaway here: Restaurateurs should start a restaurant loyalty program if they don't already have one. When building a restaurant loyalty program, it's important to think about the right rewards to offer. We asked guests and restaurateurs to rank four types of loyalty rewards in order of importance.

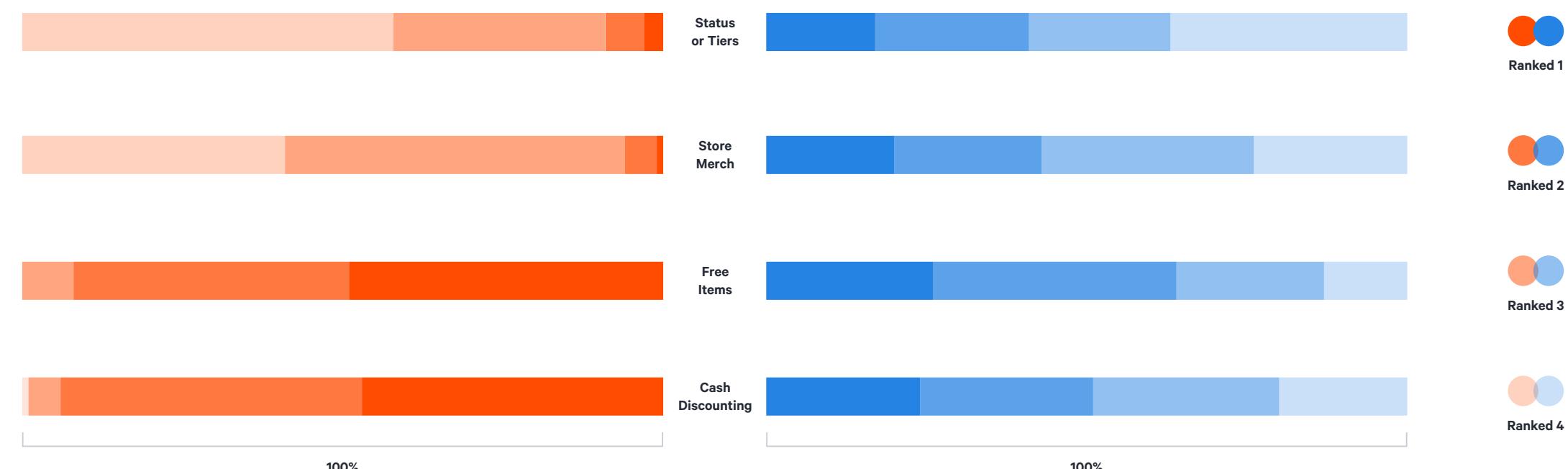
While restaurateurs ranked cash discounts, free items, store merchandise, and status tiers as almost equally important, guests love freebies – both cash discounts and free items.

● Guests ● Restaurants

HOW IMPORTANT ARE LOYALTY PROGRAMS TO YOUR RESTAURANT STRATEGY? HOW IMPORTANT ARE LOYALTY PROGRAMS TO YOUR GUEST EXPERIENCE?



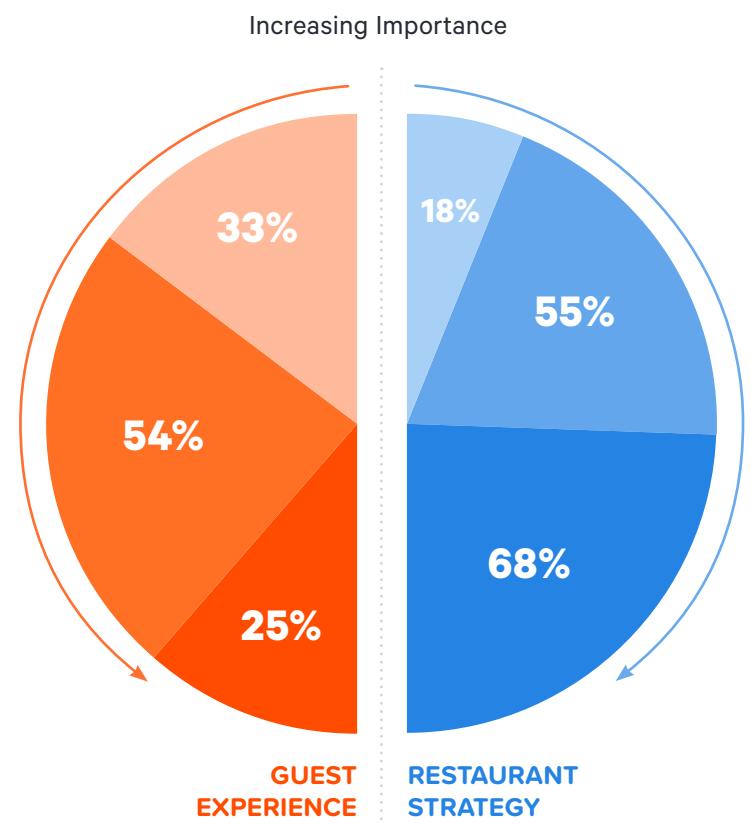
WHAT TYPES OF REWARDS ARE MOST IMPORTANT IN A RESTAURANT LOYALTY PROGRAM? RANKED IN ORDER OF IMPORTANCE,



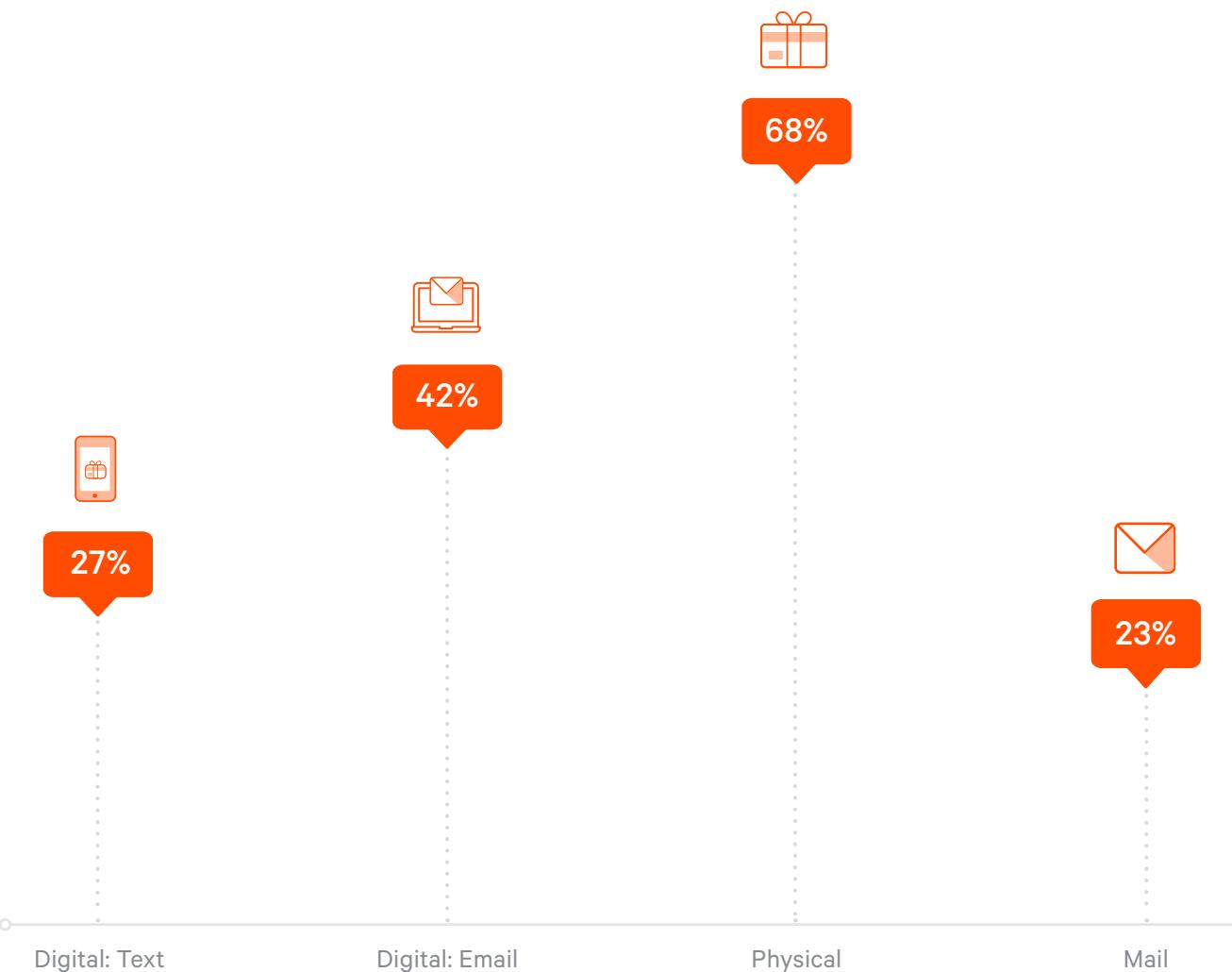
Gift Cards

Another way to keep guests coming back is to promote a restaurant gift card program. **41% of restaurant professionals** said gift cards are an extremely important part of their strategies, but only **12% of guests agreed.**

THE IMPORTANCE OF GIFT CARDS TO THE RESTAURANT STRATEGY VS. THE GUEST EXPERIENCE.

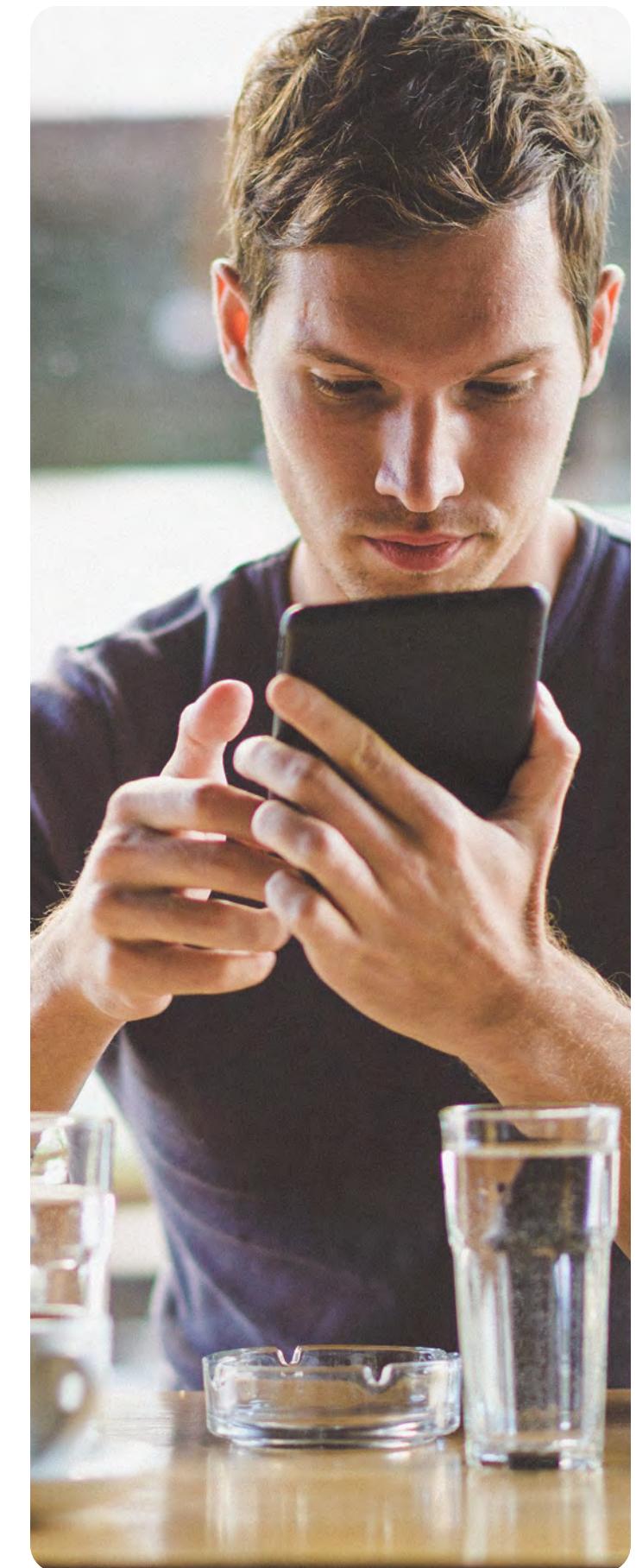


WHICH GIFT CARD DELIVERY METHODS DO YOU OFFER? SELECT ALL THAT APPLY.



Guests seem ambivalent about gift cards, but perhaps that's because they no longer want to carry around a physical gift card. Luckily, it seems the industry is trending towards digital gift card

programs. Restaurateurs still rely on physical gift cards the most, but **69% are now using digital gift cards, either via text or email.**

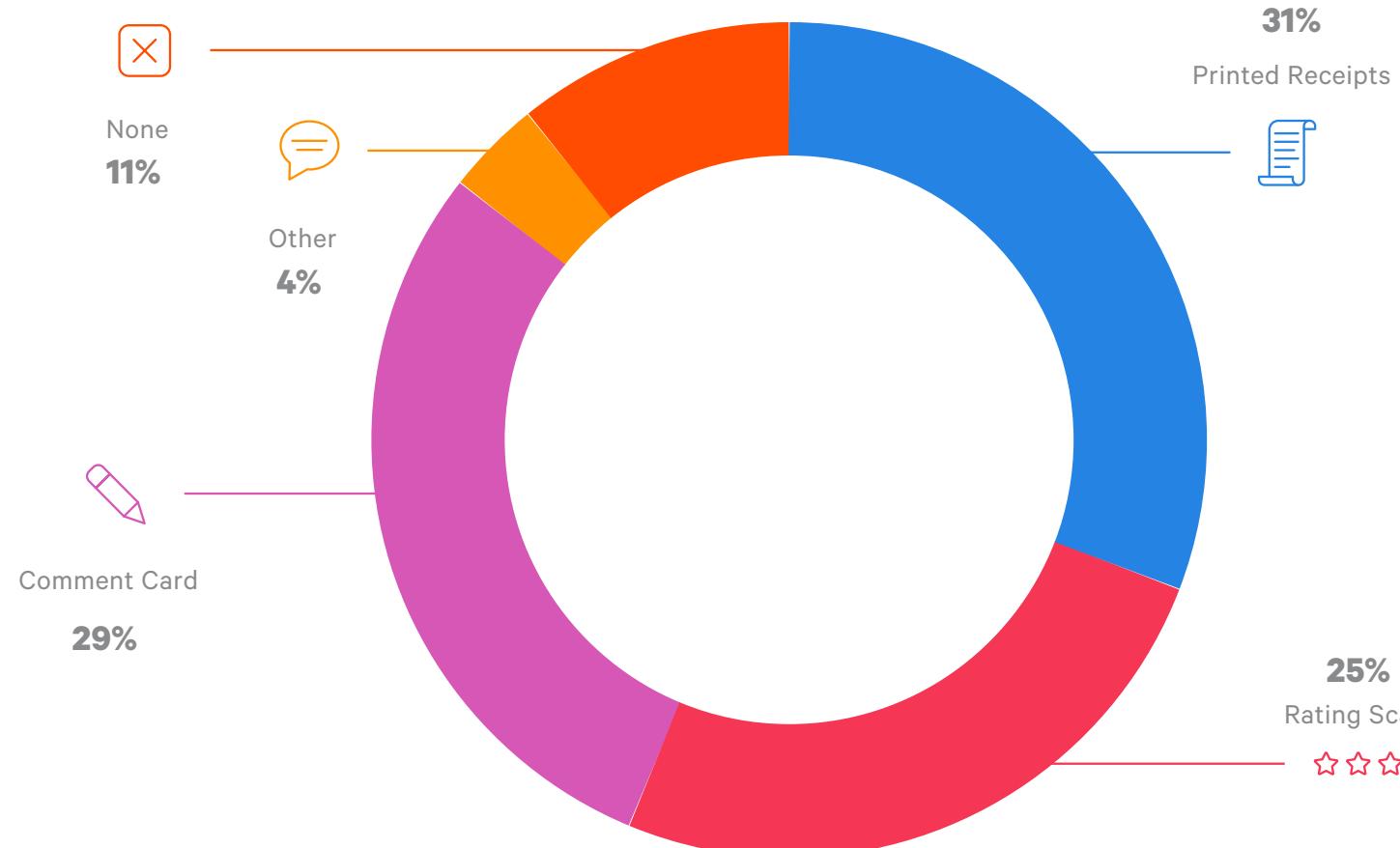


Guest Feedback

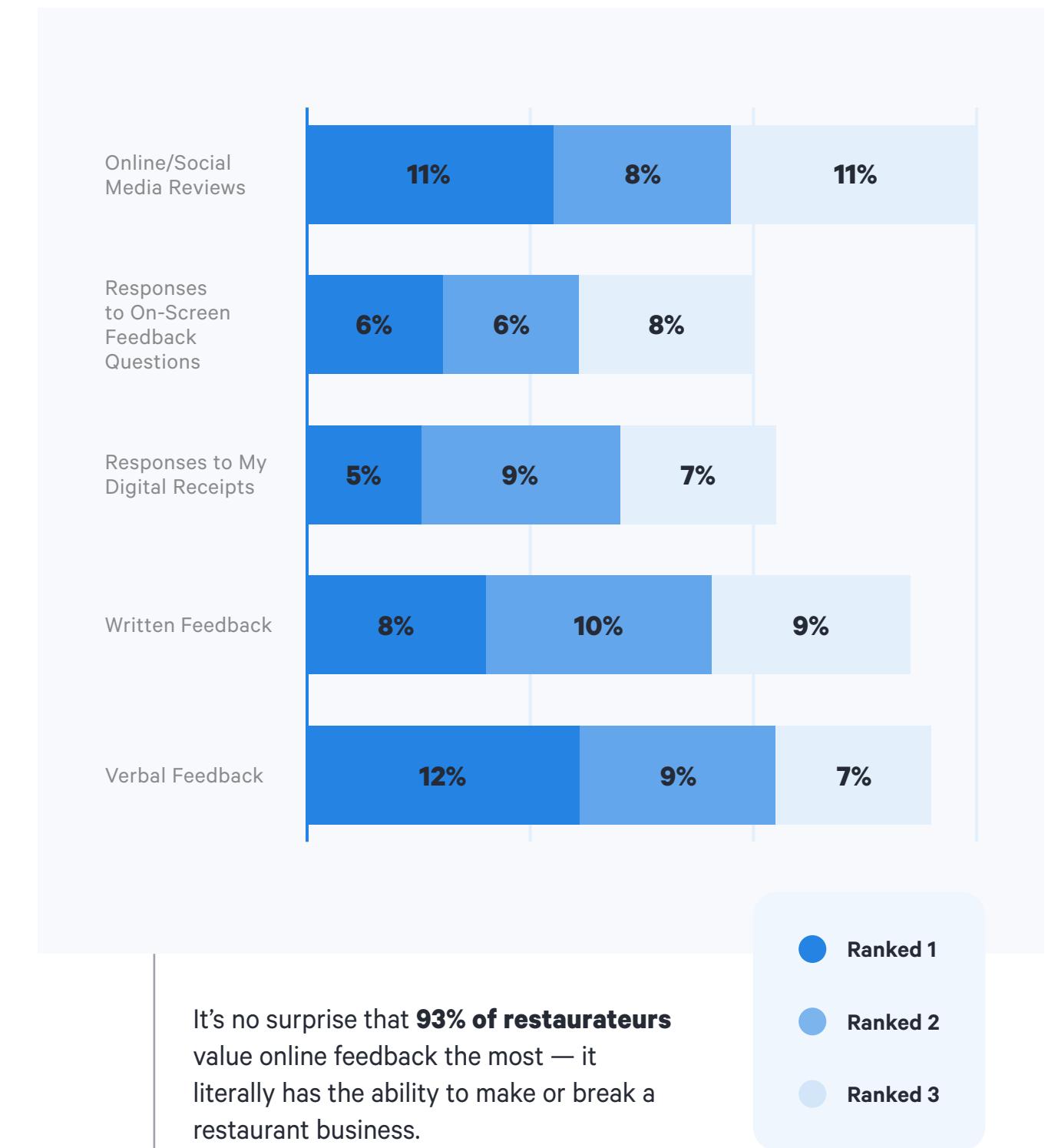
Guest feedback is one of the most important ingredients in doing good business. Whether the restaurant asks for feedback **through their POS**, on comment cards, or in a post-meal email, it's crucial to listen to what guests have to say.

29% of restaurateurs use manual comment cards, another **31% ask for feedback** on their printed receipts, and **25% use a rating scale** in digital receipts. Other restaurateurs said they speak with guests in person, monitor online reviews, and collect ratings on their websites.

HOW DO YOU CURRENTLY COLLECT GUEST FEEDBACK?



WHAT TYPE OF GUEST FEEDBACK IS MOST VALUABLE TO YOU?

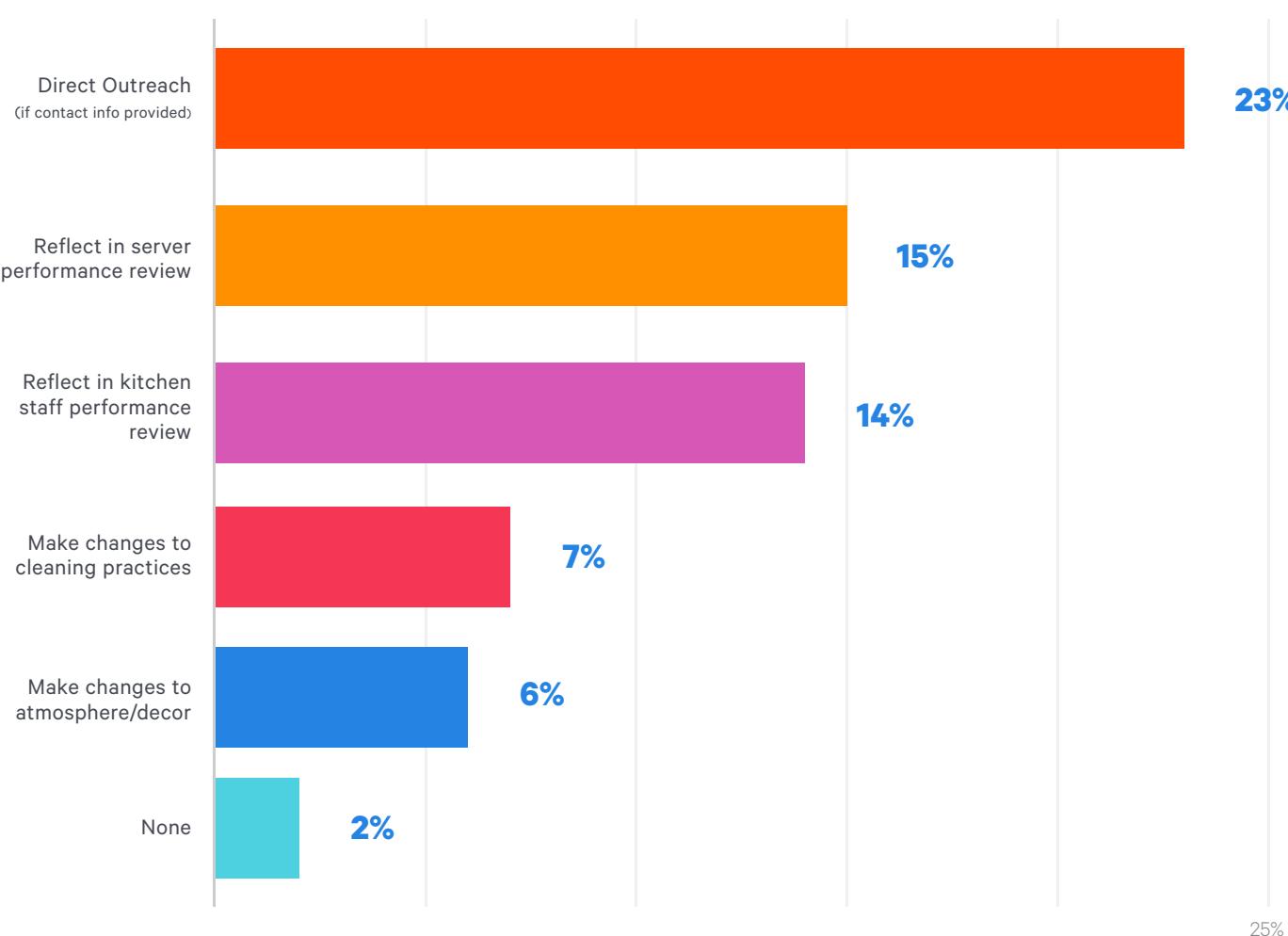


Negative Feedback

Negative feedback is never fun to receive, but it's a great indicator of what could be improved, and it's important that restaurant professionals don't take it personally. Plus, it's really all about the response.

23% of restaurateurs reach out directly to the person who gave negative feedback. 15% put the feedback to use when giving performance reviews to front-of-house or back-of-house staff. Some restaurant professionals — 2% — admitted to never taking action when receiving negative guest feedback.

① WHICH ACTION DO YOU USUALLY TAKE WHEN YOU RECEIVE NEGATIVE GUEST FEEDBACK?



Guest Experience Success Kit

- HOW TO BE A BETTER RESTAURANT SERVER →
- GUEST EXPERIENCE BOOTCAMP →
- 22 WAYS TO DELIGHT YOUR GUESTS IN 2019 →
- 3 STRATEGIES FOR GUEST FEEDBACK THAT ACTUALLY WORK →



CHAPTER SIX

Shaping the Restaurant Experience

Measuring Back-of-House and Front-of-House Trends



Restaurants use an average of **3** technology vendors to manage back-office operations.



50% of restaurant professionals say accounting, payroll, and business intelligence software are extremely important to their restaurants.

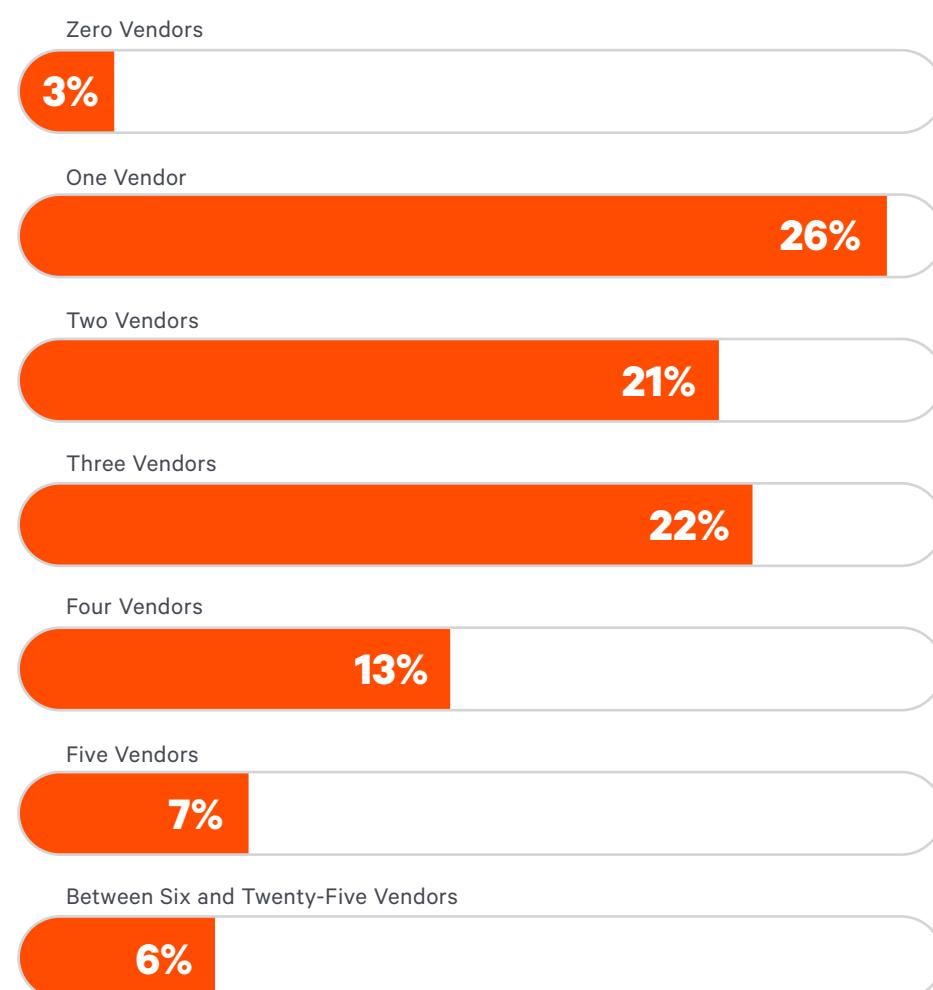


68% of restaurant professionals review sales reports on a regular basis, 45% regularly review labor reports, and 32% regularly review menu reports.

Technology works behind the scenes to shape a great guest experience.

In fact, restaurants are using an **average of three** technology vendors to tackle everything from online ordering to reservations to payroll. One-quarter of respondents said they use **one vendor**, however, and many expressed the need for an all-in-one system.

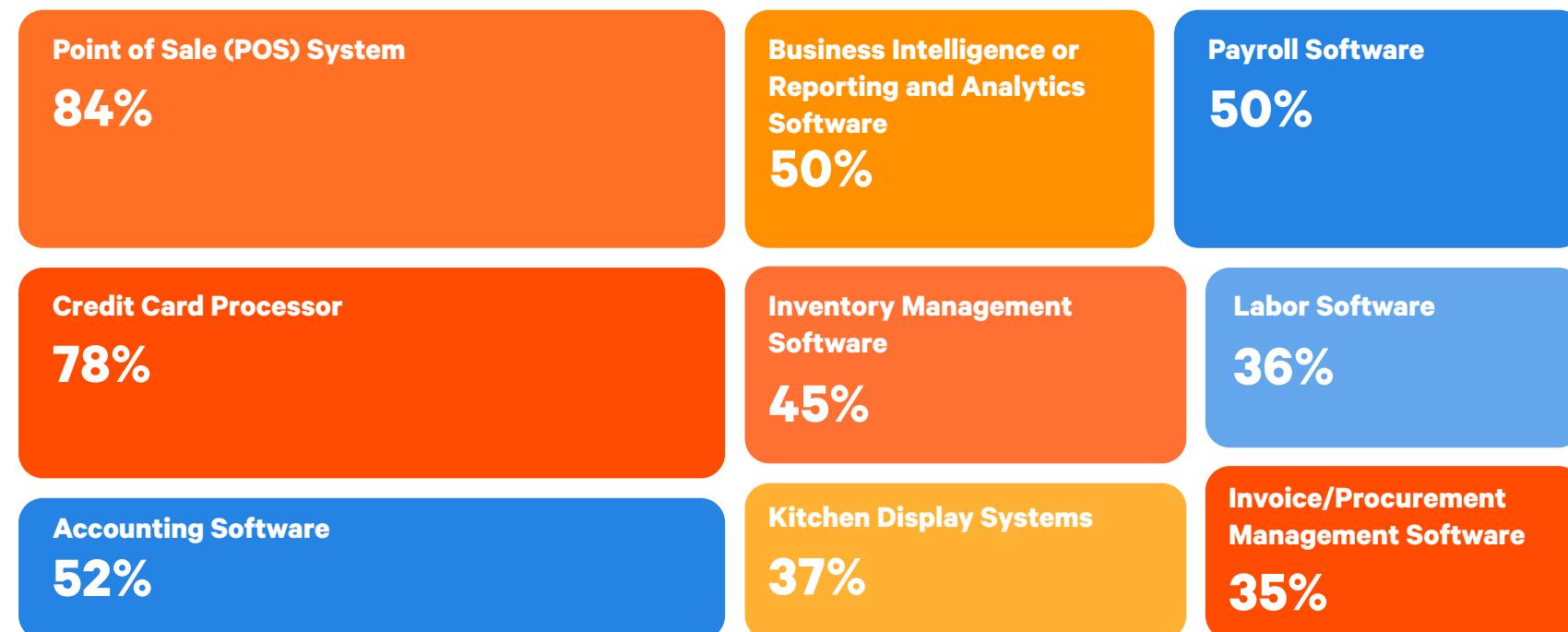
⑤ HOW MANY TECHNOLOGY VENDORS DOES YOUR RESTAURANT CURRENTLY PAY FOR?



What technologies are they using? First: the point of sale. **84% of restaurant professionals** said the point of sale system was extremely important, and **78%** said credit card processing was extremely important. Guests use credit and debit cards for almost all purchases, so it makes sense that restaurant professionals would mark these two features as integral to their businesses.

The next most popular back-office technologies were **accounting software** (52%, up from 31% in 2018) and **payroll software** (50%, up from 28% in 2018). Restaurant professionals are clearly looking for tools to protect their restaurants amid changing regulations and simplify taxes when dealing with multiple pay rates, minimum wage calculations, and blended overtime across locations.

⑥ HOW IMPORTANT ARE THESE TECHNOLOGIES TO YOUR RESTAURANT?



36% of restaurant professionals marked labor software

(e.g. scheduling, not payroll) as extremely important, up from 16% in 2018. The rise in popularity of scheduling tools like **HotSchedules** or **7shifts**, which provide staff with an app to view schedules and the ability to share feedback with their manager from their mobile phones, could contribute to this increase.



Operators are taking steps to improve operations using software.

The ever-changing technological landscape in restaurant management has led to great strides in the software and services available. It's great to see that operators are seeing platforms like MarketMan as opportunities and are taking steps to improve operations using software.

More than 75% of restaurants surveyed believe that inventory management,

accounting, procurement, and analytics are important for their businesses. Having all of these departments connected through one platform, being fed information from the POS provides actionable insights to lower costs by 5% and increase productivity by 50%.

Reducing food waste is another key component of lowering food costs and increasing your bottom line — not to

mention minimizing your restaurant's ecological footprint. Of the restaurants surveyed, 26% admitted to not having any measures in place to diminish waste. Being able to track waste right on your mobile device is tremendously helpful to quantify just how much is being wasted. Any employee with the app on their phone or tablet can quickly enter what's being thrown away, donated, or over-produced. Just a few short weeks of tracking waste

through MarketMan can help quantify where you are being wasteful so you can begin taking steps to reduce it. Now more than ever, it's crucial to stay conscious of environmental impacts.



Matthew Hardoon
MarketMan
Director of Sales

Reporting

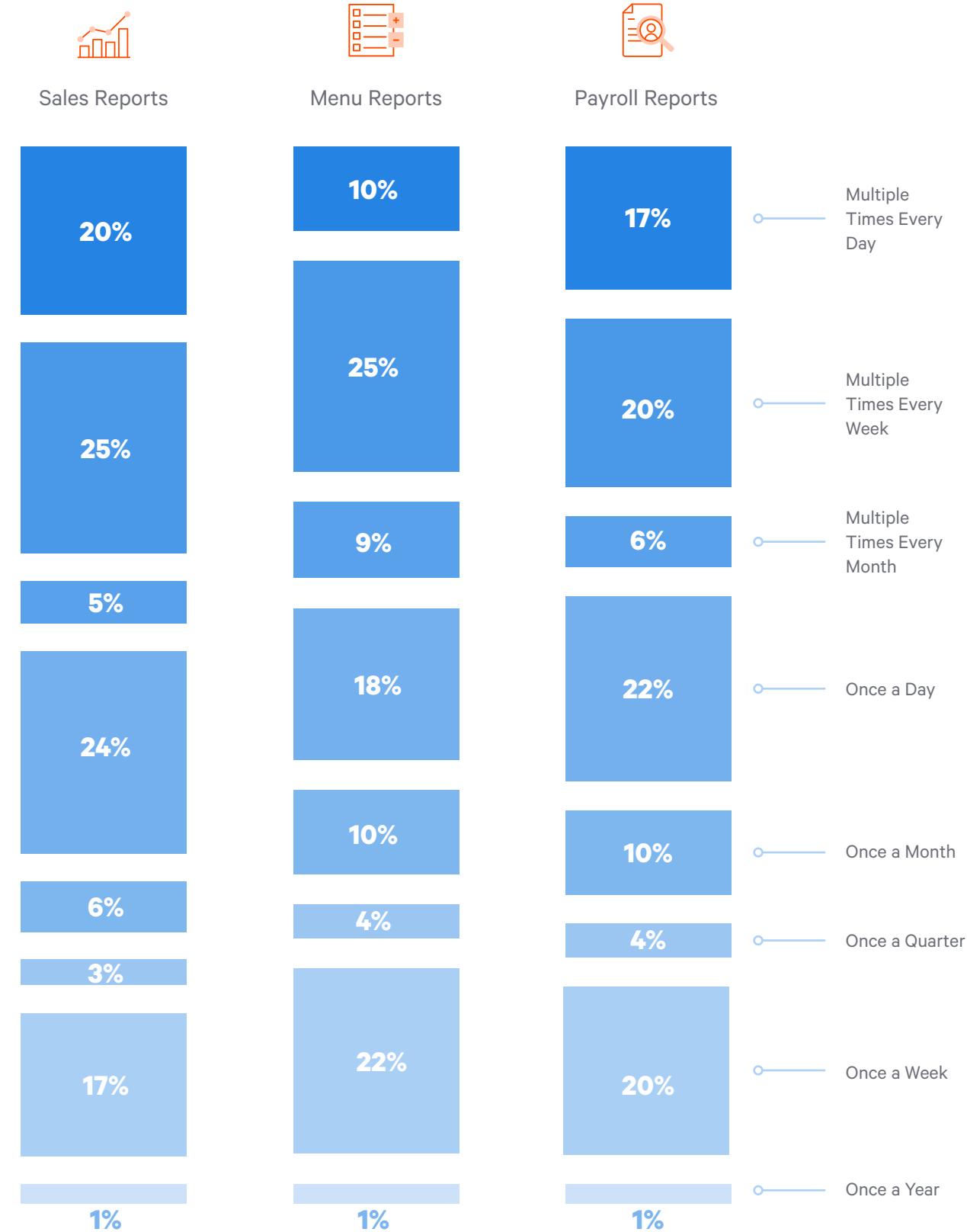
To keep a restaurant running successfully, restaurateurs need to monitor performance regularly, viewing sales reports, menu reports, and labor reports. **50% marked business intelligence** or reporting and analytics software as extremely important (up from 47% in 2017). It's clear restaurant professionals are becoming more data-driven, analyzing sales by day, menu product mix, and labor costs with advanced **restaurant analytics software**.

68% of restaurant professionals said they

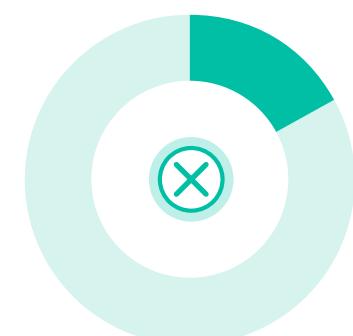
review sales reports on a regular basis. **45%** said they regularly review **labor reports**, and **32%** said they regularly review **menu reports**. All of these reports are critical when pulling an **annual restaurant P&L statement**.

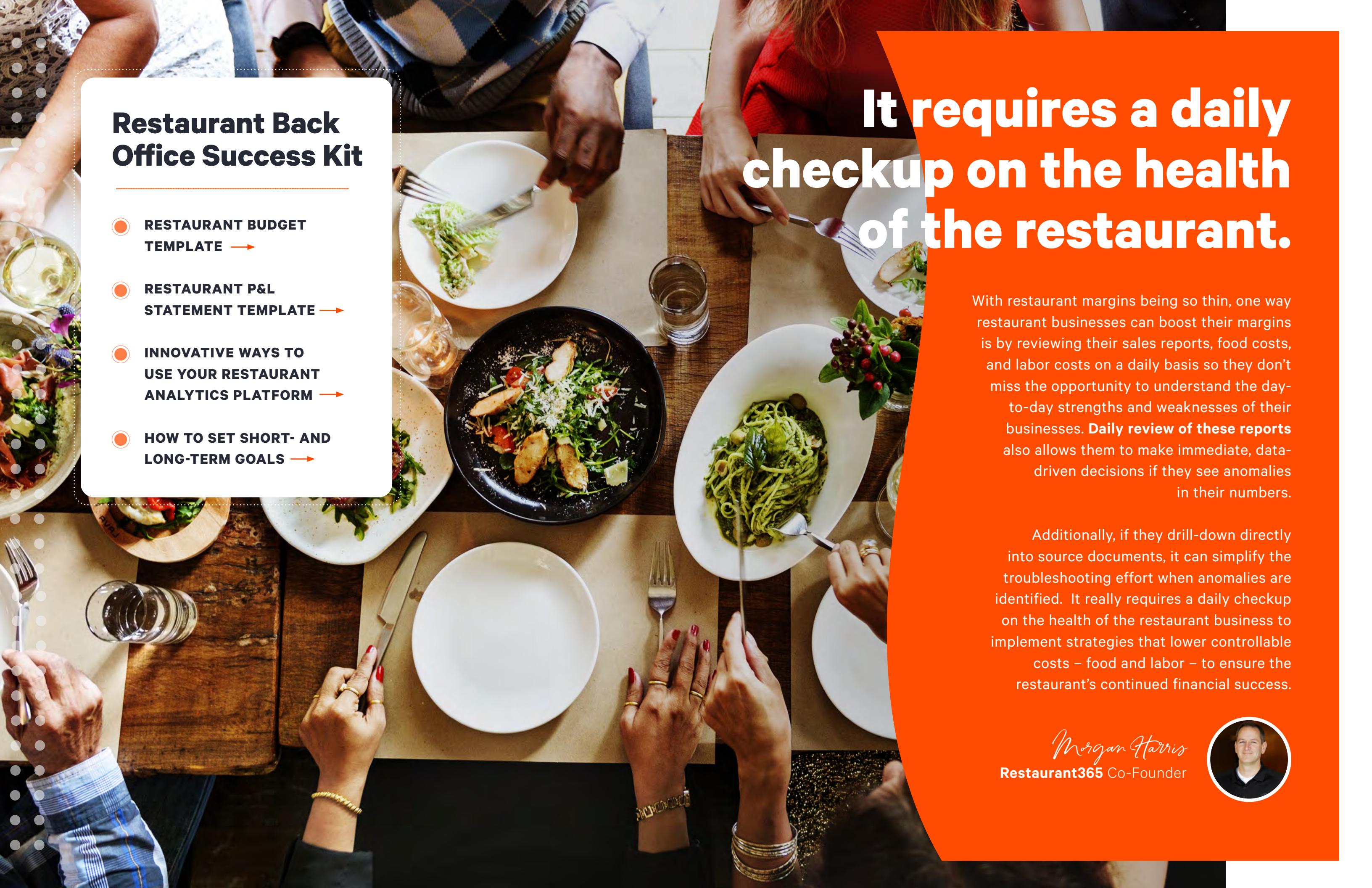
Many restaurant professionals actually refresh these analytics multiple times every day, showing a need for mobile access to these reports anywhere, anytime. Most restaurant professionals access these reports multiple times a week, and many do monthly analysis.

WHEN DO YOU GENERALLY REVIEW THESE REPORTS?



WHICH OF THE FOLLOWING TYPES OF REPORTS DO YOU REVIEW ON A REGULAR BASIS (AT LEAST ONCE A YEAR)?





Restaurant Back Office Success Kit

- RESTAURANT BUDGET TEMPLATE →
- RESTAURANT P&L STATEMENT TEMPLATE →
- INNOVATIVE WAYS TO USE YOUR RESTAURANT ANALYTICS PLATFORM →
- HOW TO SET SHORT- AND LONG-TERM GOALS →

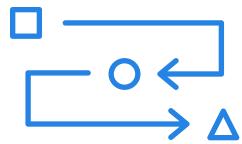
It requires a daily checkup on the health of the restaurant.

With restaurant margins being so thin, one way restaurant businesses can boost their margins is by reviewing their sales reports, food costs, and labor costs on a daily basis so they don't miss the opportunity to understand the day-to-day strengths and weaknesses of their businesses. **Daily review of these reports** also allows them to make immediate, data-driven decisions if they see anomalies in their numbers.

Additionally, if they drill-down directly into source documents, it can simplify the troubleshooting effort when anomalies are identified. It really requires a daily checkup on the health of the restaurant business to implement strategies that lower controllable costs – food and labor – to ensure the restaurant's continued financial success.

Morgan Harris
Restaurant365 Co-Founder





Report Methodology

The Toast team conducted three surveys throughout the past year:

Disclaimer: For questions where respondents were asked to select multiple check boxes or rank their top three choices, the total number of answer choices selected can be greater than the number of respondents who answered the question. This can cause the total response percentages to exceed 100%.

- In June, 2018, a survey of 859 restaurateurs was conducted, with a margin of error of 3% and a confidence level of 95%.
- In March, 2019, a survey of 1,029 diners was conducted, with a margin of error of 3% and a confidence level of 95%.
- In March, 2019, a survey of 394 restaurant professionals was conducted, with a margin of error of 5% and a confidence level of 95%.

Of the restaurant professionals who responded:

- 55% were fine dining or casual dining restaurants; 22% were quick service / fast casual restaurants; 15% were cafe / bakery / deli restaurants; 5% were bar / nightclub restaurants; 2% were pizzeria restaurants; and 1% were other (e.g. institution dining, event catering, or delivery and take-away only).
- 35% were CEOs / Owners / Partners; 35% were General Managers; 14% were Assistant Managers; 7% were COOs / Directors of Operations; 4% were Head Chefs; 4% were CIOs / Directors of IT; and 2% were CMOs / Directors of Marketing.
- 6% opened less than 12 months ago; 11% opened from 12 months to less than 2 years ago; 25% opened from 2 years to less than 5 years ago; 28% opened from 5 years to less than 10 years ago; 18% opened from 10 years to less than 20 years ago; and 12% opened more than 20 years ago.
- 38% had 1 location; 24% had 2-3 locations; 21% had 4-9 locations; 13% had 10-99 locations; 4% had 100+ locations.
- 3% had less than 5 employees; 12% had from 5-9 employees; 42% had 10-19 employees; 33% had 20-49 employees; 9% had more than 50 employees.
- The average monthly sales for restaurants surveyed was \$147,108.84.

Of the guests who responded:

- 34% identified as male; 65% identified as female; and 1% preferred not to answer.
- 4% were Generation Z (born between 1997-2012); 30% were Millennial (born between 1981-1996); 27% were Generation X (born between 1965-1980); 36% were Boomers (born between 1946-1964); 4% were Silent (born between 1928-1945).
- 80% identified as Caucasian or White; 6% identified as African American or Black; 4% identified as Asian American or Asian; 4% identified as Spanish, Hispanic, or Latino; 1% identified as Native Alaskan, Native American, Native Hawaiian, or other Pacific Islander; and 1% identified as Other.



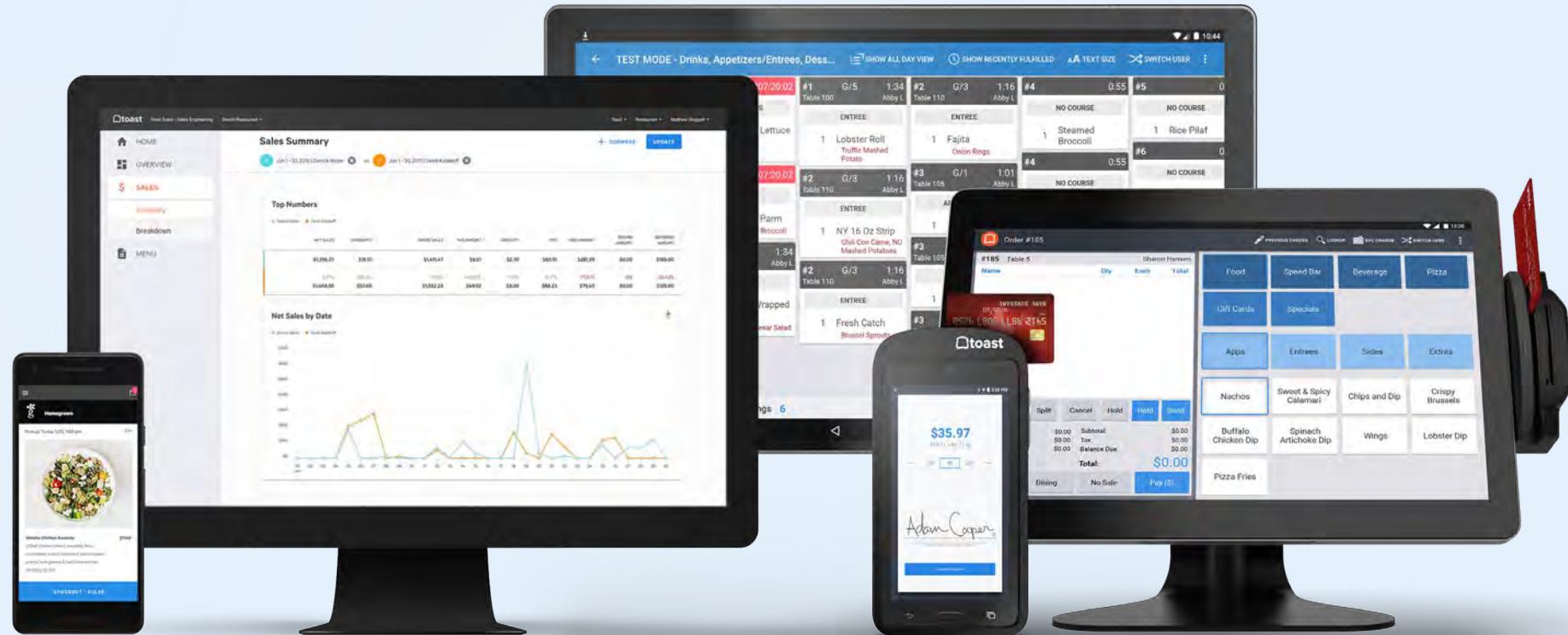
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