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A Note to Readers

For nearly three years, the State of What
Feeds Us reports have kept tabs on consumer
restaurant behavior amid ever-changing
social and environmental circumstances.
Now in its seventh installment, the study
pays particular attention to inflation and the
dramatic impact on restaurant habits.

For the first time, the report compares coffee chains to QSRs and highlights growing competition for customers. Also for the first time, the study explores consumer sentiment surrounding plant-based menus, food waste, and other sustainability efforts.

And, like previous reports, this study continues to examine drive-thru visits, restaurant app engagement, loyalty programs, mobile ordering, and, of course, wait time.

Here are the key takeaways:

- With shorter drive-thru lines, coffee chains are tempting fast food customers. 6 in 10 consider visiting a coffee chain if fast food drive-thru lines are long.
- Price increases have consumers hunting for discounts and offers. 3 in 4 consumers are looking for deals on fast food.
- For discounts and freebies, consumers are downloading more apps and joining more loyalty programs.
- When it comes to mobile order pickup, consumers are frustrated and impatient.

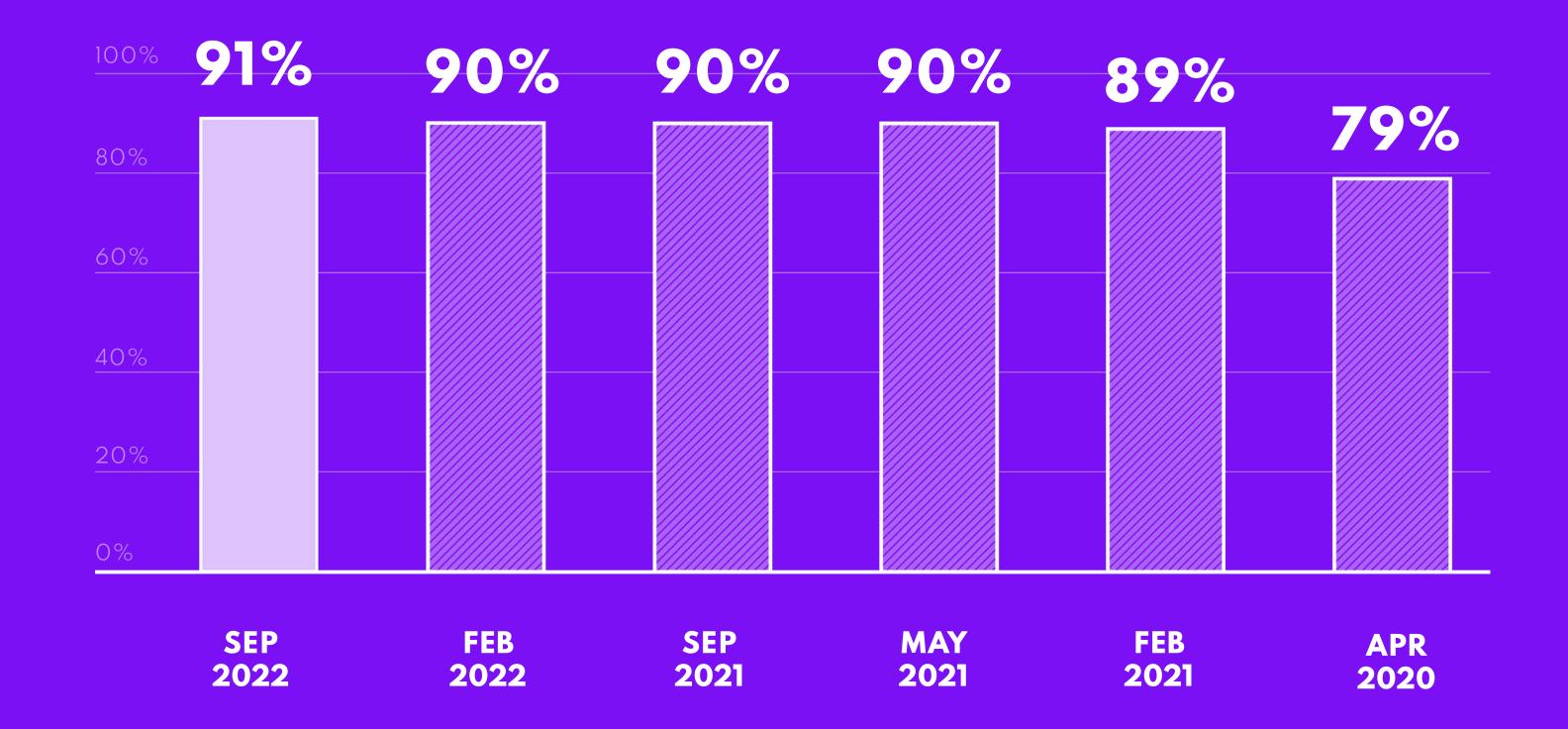
 A third of consumers don't want to wait more than four minutes.
- Consumers want restaurants to take sustainability seriously. Consumers will visit those that do more often, but they aren't willing to pay more for it.



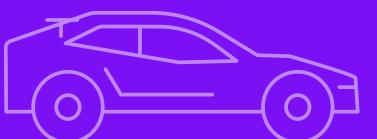


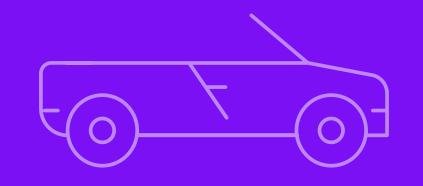
Customers Visiting Drive-Thru Last Month

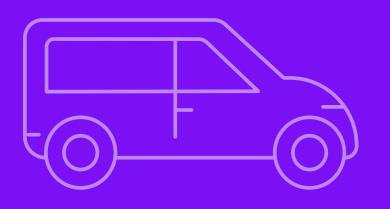
Drive-thru visits remain strong.

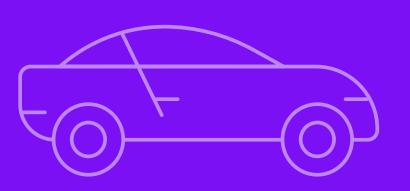




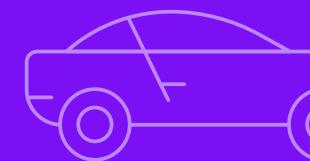




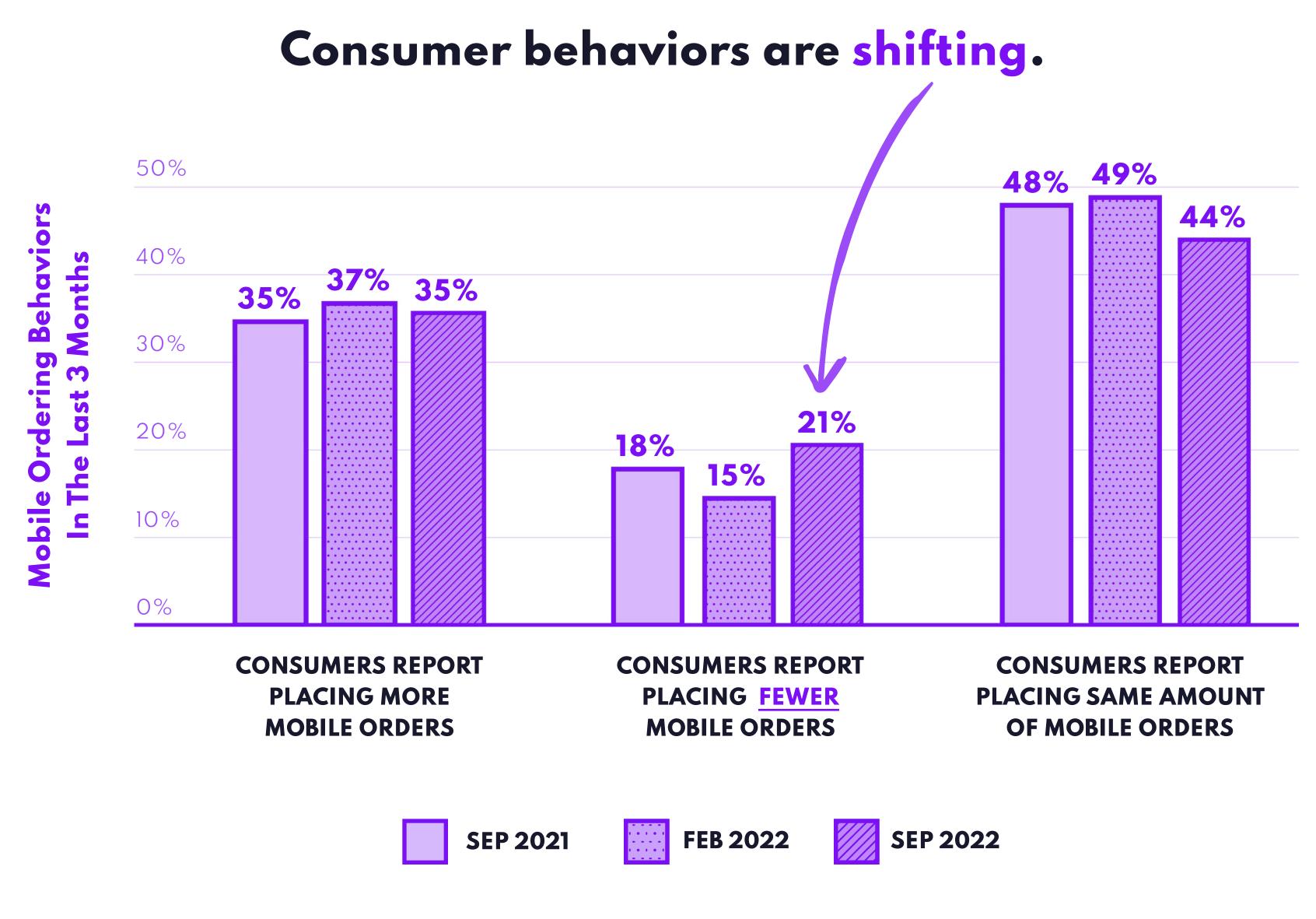












SPOTLIGHT However, high-income earners are placing more mobile orders than other earners in the last three months. of earners over \$100K 33% 34% of earners of earners \$50K - \$100K under \$50K





MAITING

upon arrival continues to be a sore spot.



ORDER ISN'T READY UPON ARRIVAL



ORDER IS READY, BUT STILL NEED TO WAIT

SEP 2022

40%

FEB 2022

50%

SEP 2021

44%











SPOTLIGHT

NEW to top frustrations list: Staff is preoccupied upon customer arrival.

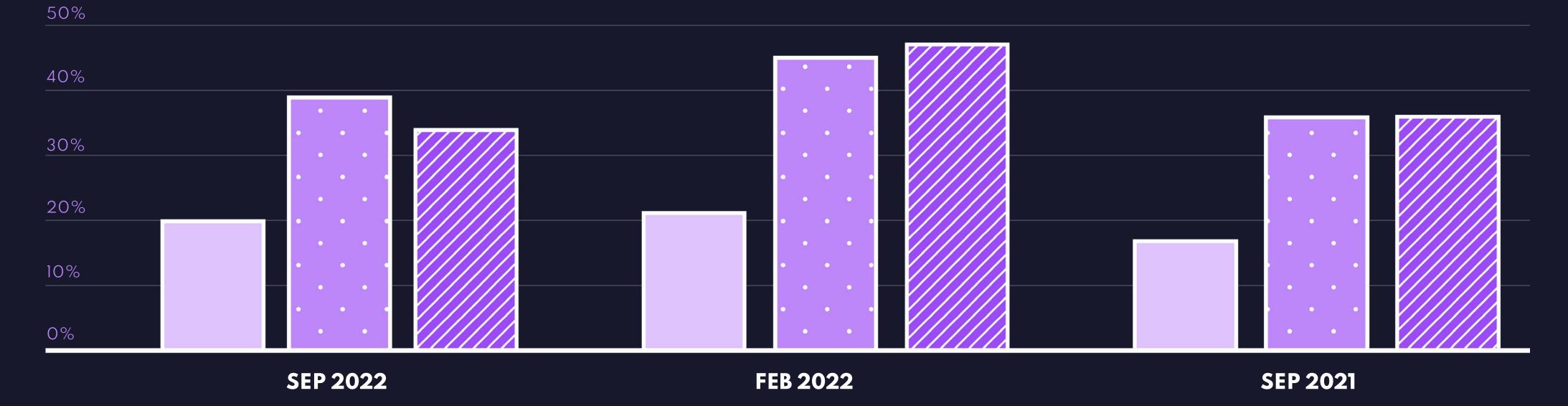
Mobile Pickup Frustration Trends













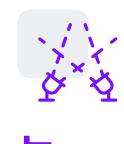


When it comes to mobile order pickup, consumers are highly impatient.

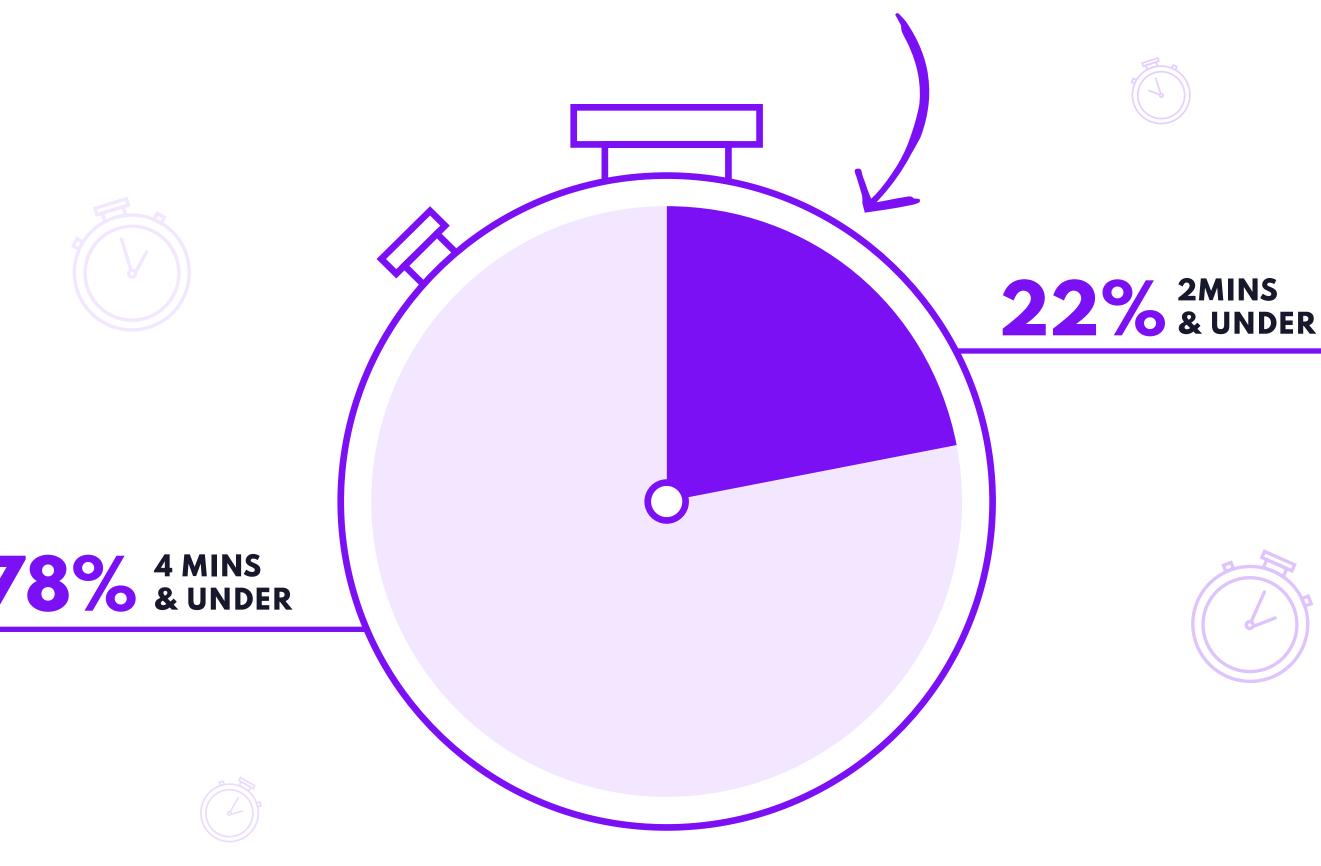
33% of consumers overall

want wait times **under**

4 minutes.



Of those customers, nearly a quarter want wait times under 2 minutes.

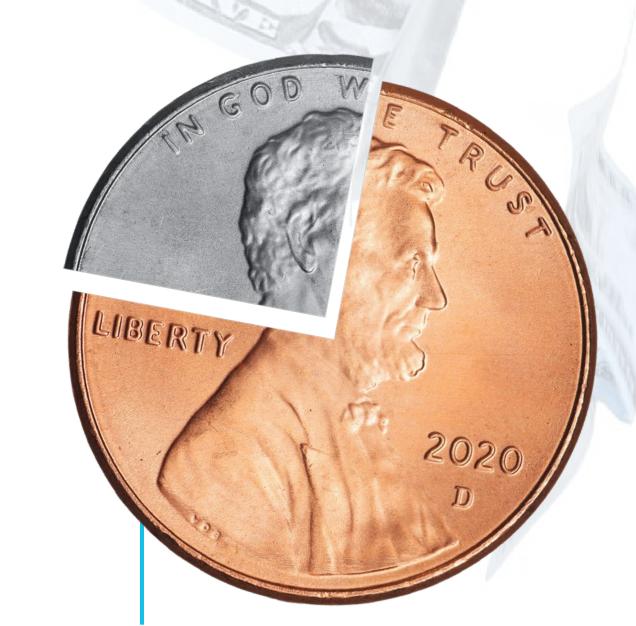








Price increases have consumers hunting for discounts and offers.



are looking for deals.



consumers
looking for
offers,

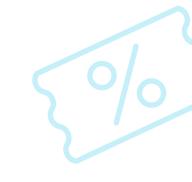
consumers have taken notice of more deals from fast food restaurants.

Top Ways Consumers Find Coupons and Deals











Gen Z outpace all other groups on social media.

44%

of this group are finding coupons and deals on social media.

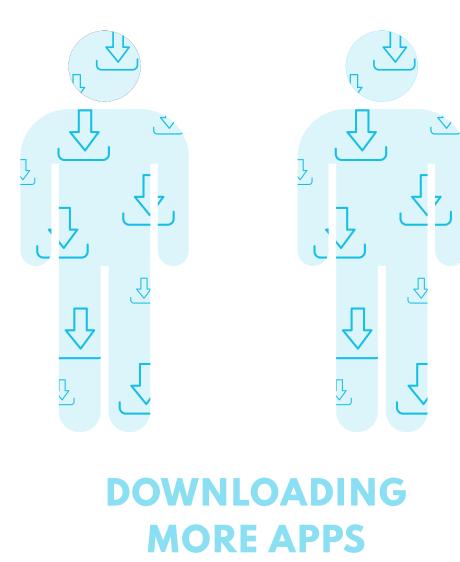


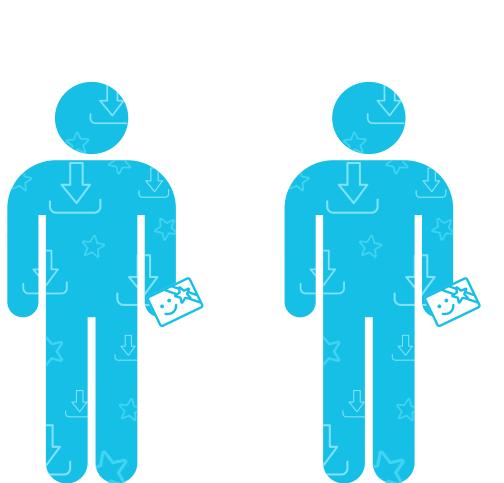


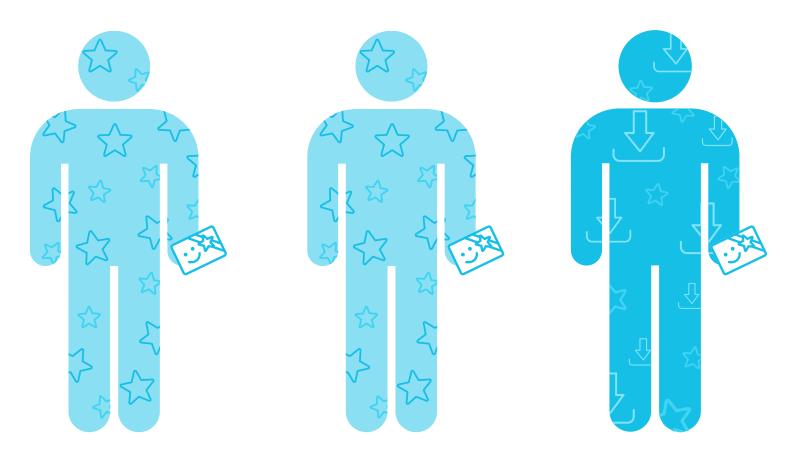


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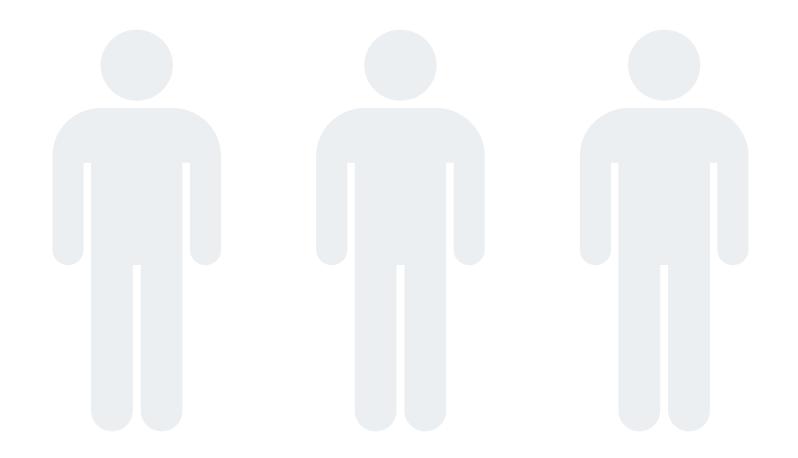
downloading more
apps or joining more
loyalty programs for
discounts and freebies.







JOINING MORE LOYALTY PROGRAMS

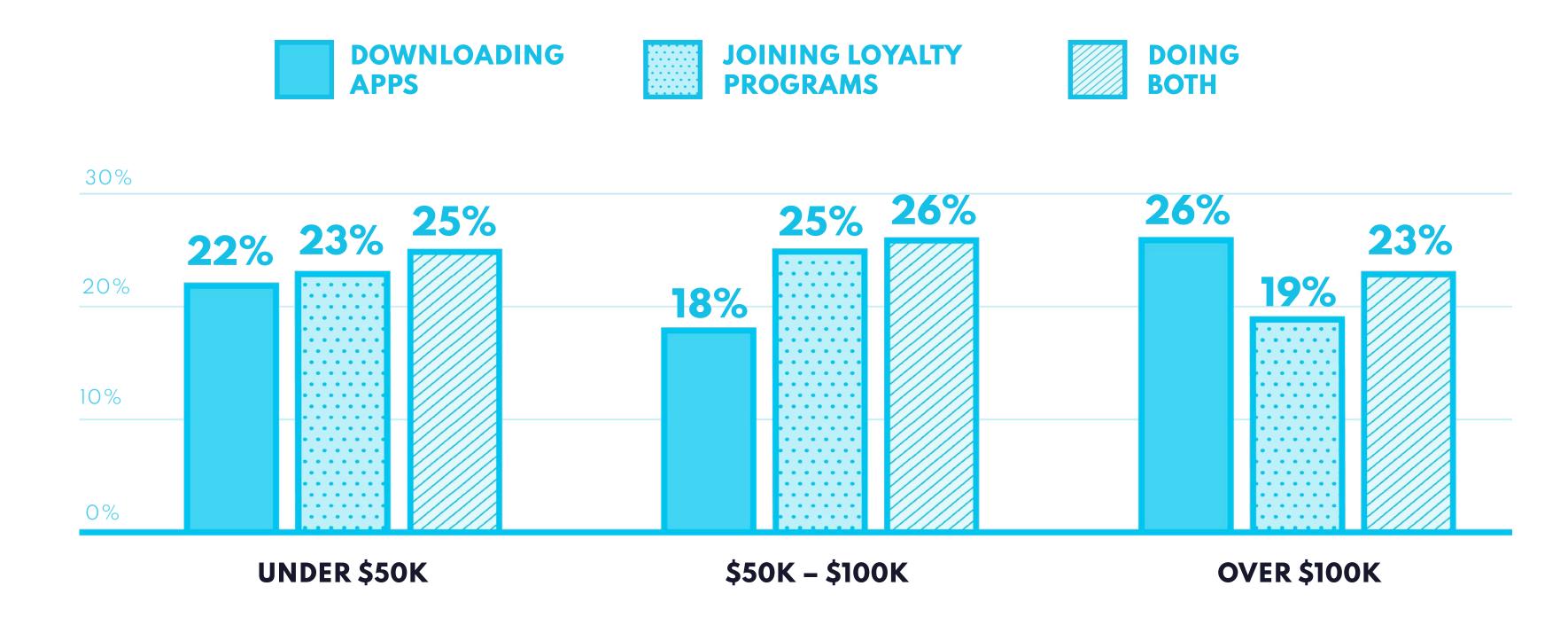


DOING BOTH



How Consumers Seek Out Deals & Offers

Consumers are
turning to apps
and loyalty
coupons to unlock
deals and offers.





High-income earners

prefer app downloads to receive deals and offers.

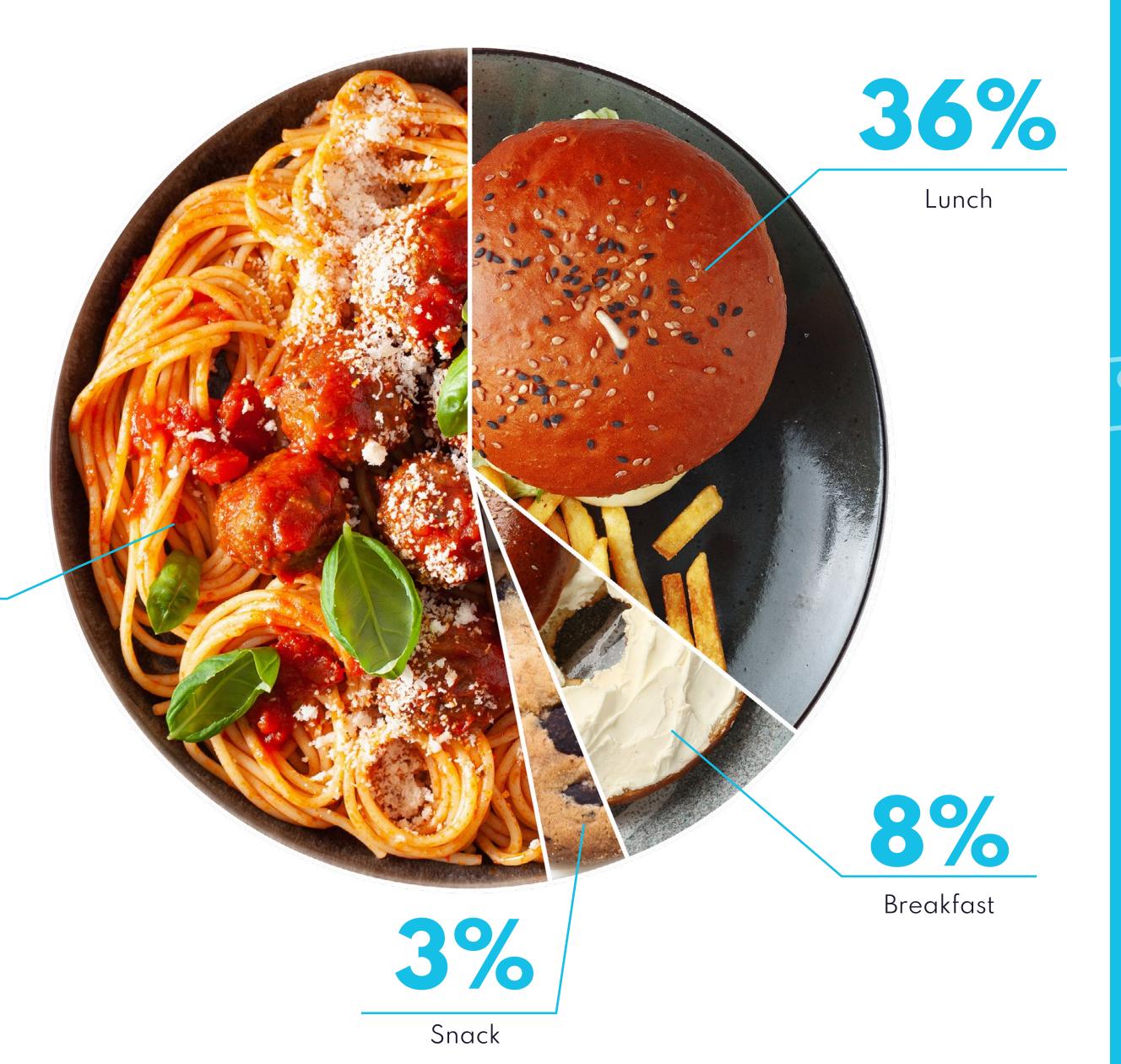


Coupons and deals for dinner are most popular.

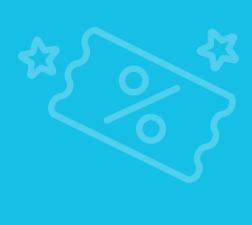
bluedot

53%

Dinner







Lunch coupons and deals are **most** * popular with Gen Z.













Coffee Chains
Take a Bite Out
of Fast Food



Consumers are buying much more than coffee.





of consumers consider coffee chains for food.



SPOTLIGHT

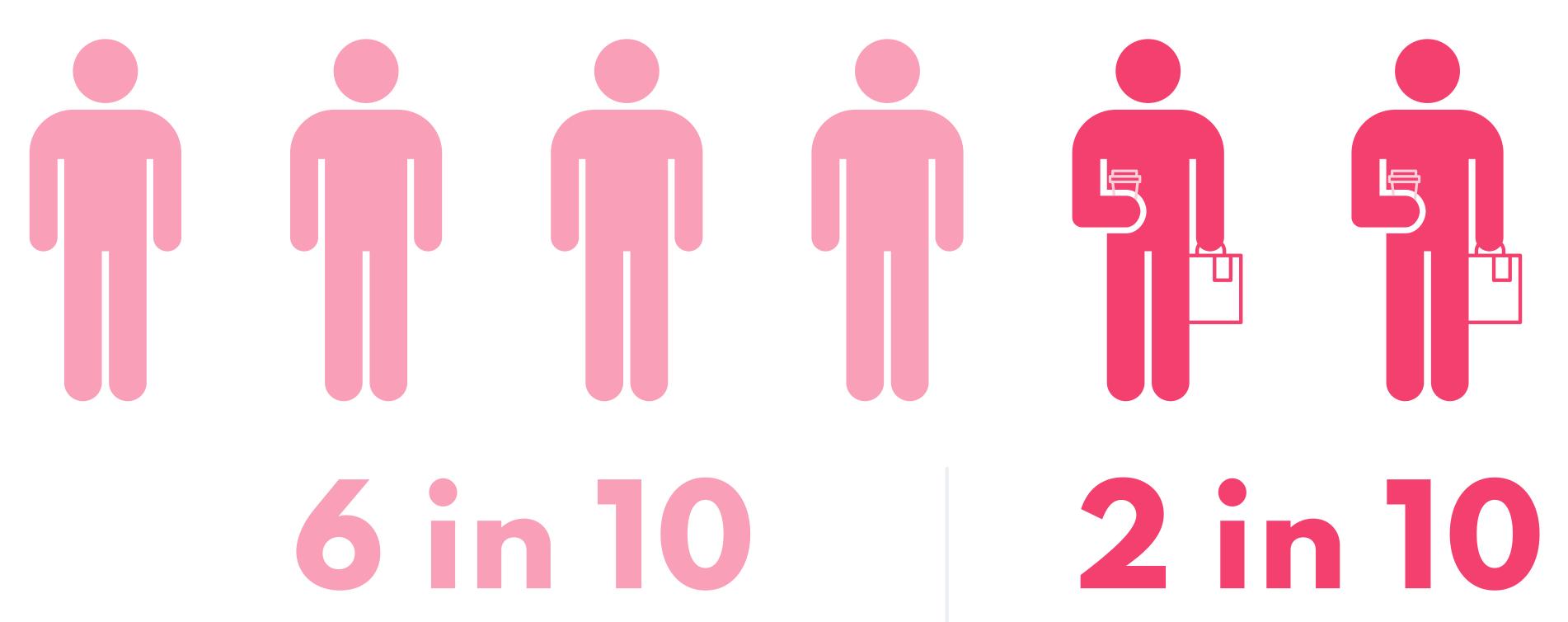
High-income earners are snacking at coffee chains.

They are more likely to consider coffee chains for a quick bite compared to other earners.





With shorter drive-thru lines, coffee chains are tempting fast food customers.



consumers consider buying food at a coffee chain if fast food drive-thrus have a long line.

have already purchased food at a coffee chain due to long drive-thru lines.



















Afternoon and daily deals draw customers to coffee chains after the morning rush.

46% Afternoon deals and offers morning rush include: **43%** Daily deals and offers

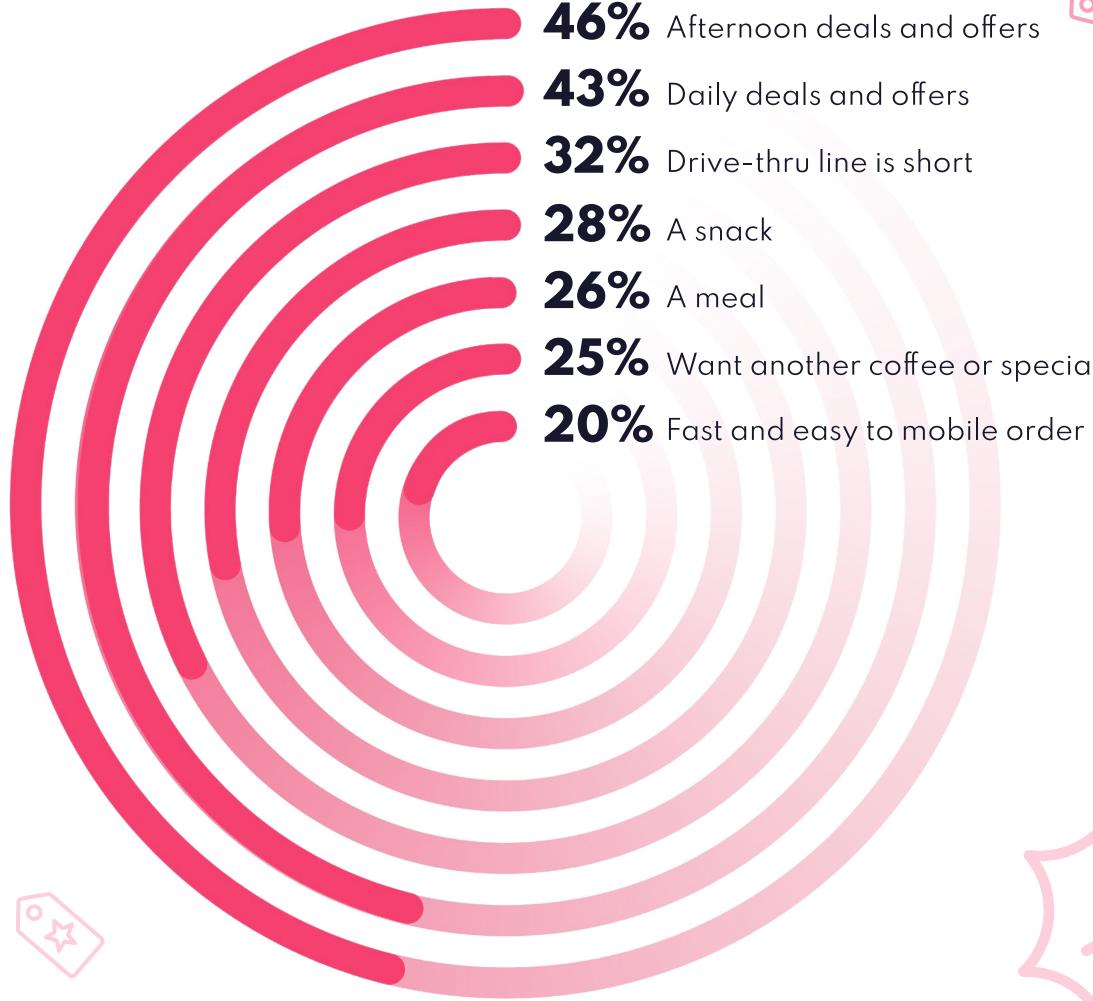
25% Want another coffee or specialty drink



most likely to visit a

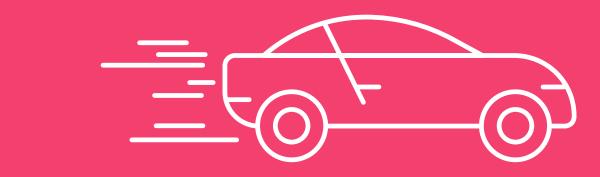
fee chain after the

Top





There's a perception coffee chain drive-thrus are faster.



HALF

of consumers believe that coffee chain drive-thrus are **faster** than fast food drive-thrus.









Consumers are welcoming plant-based menu items.





understand what it means for a restaurant to have a plant-based menu.



© 3 in 10

have ordered from plant-based menus.













There's high demand for clean ingredients.

consumers are not to visit a restaurant that offers clean ingredients.

consumers are more likely

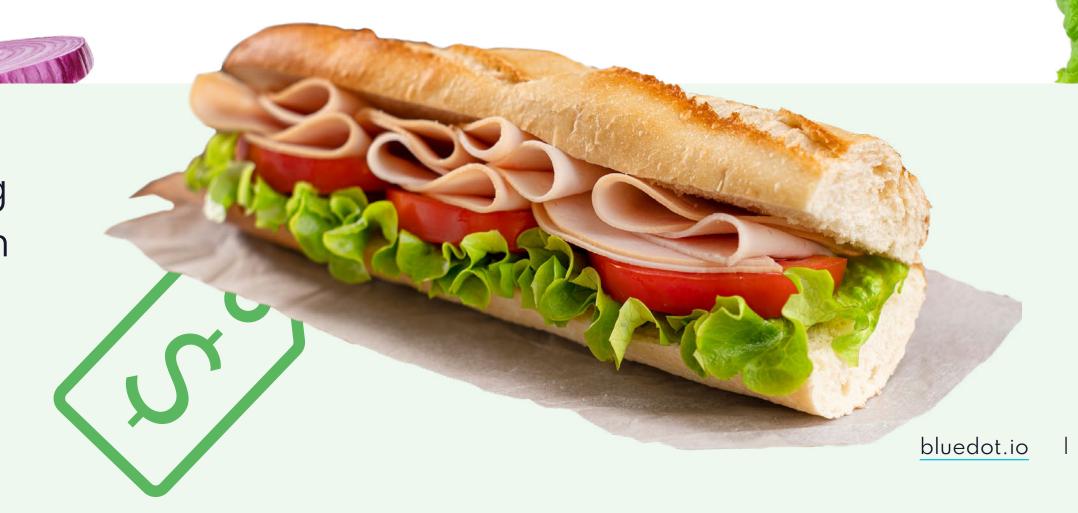




consumers are willing to pay more for clean ingredients.

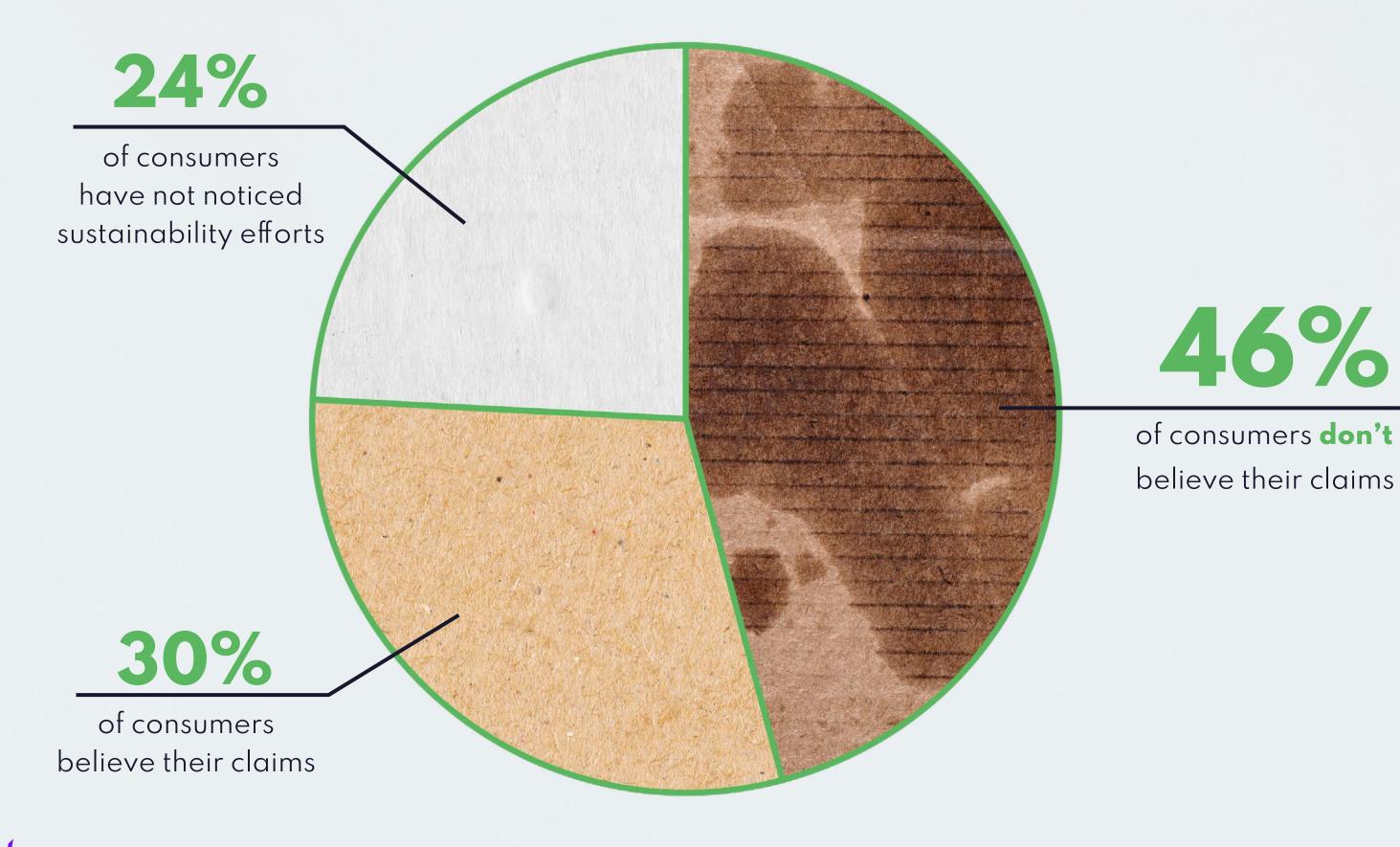






THREE-QUARTERS

of consumers recognize that restaurants are making an effort to be environmentally friendly, but many are skeptical.









Consumers want environmentally friendly restaurants, but don't want to pay more for it.









consumers are more likely





are willing to pay more for it.



Food Waste Is AProblem.

of consumers believe that fast food restaurants have excessive food waste.





Efforts to reduce food waste will win over customers.









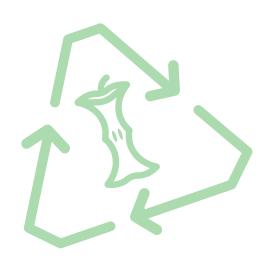




consumers would be more likely to visit a fast food restaurant if the restaurant composted or gave away their excess food or food waste.















A WHOPPING

of consumers have noticed pricing increases at restaurants.

(Up from 85% in September 2021)







Price increases are dramatically changing consumer restaurant habits.

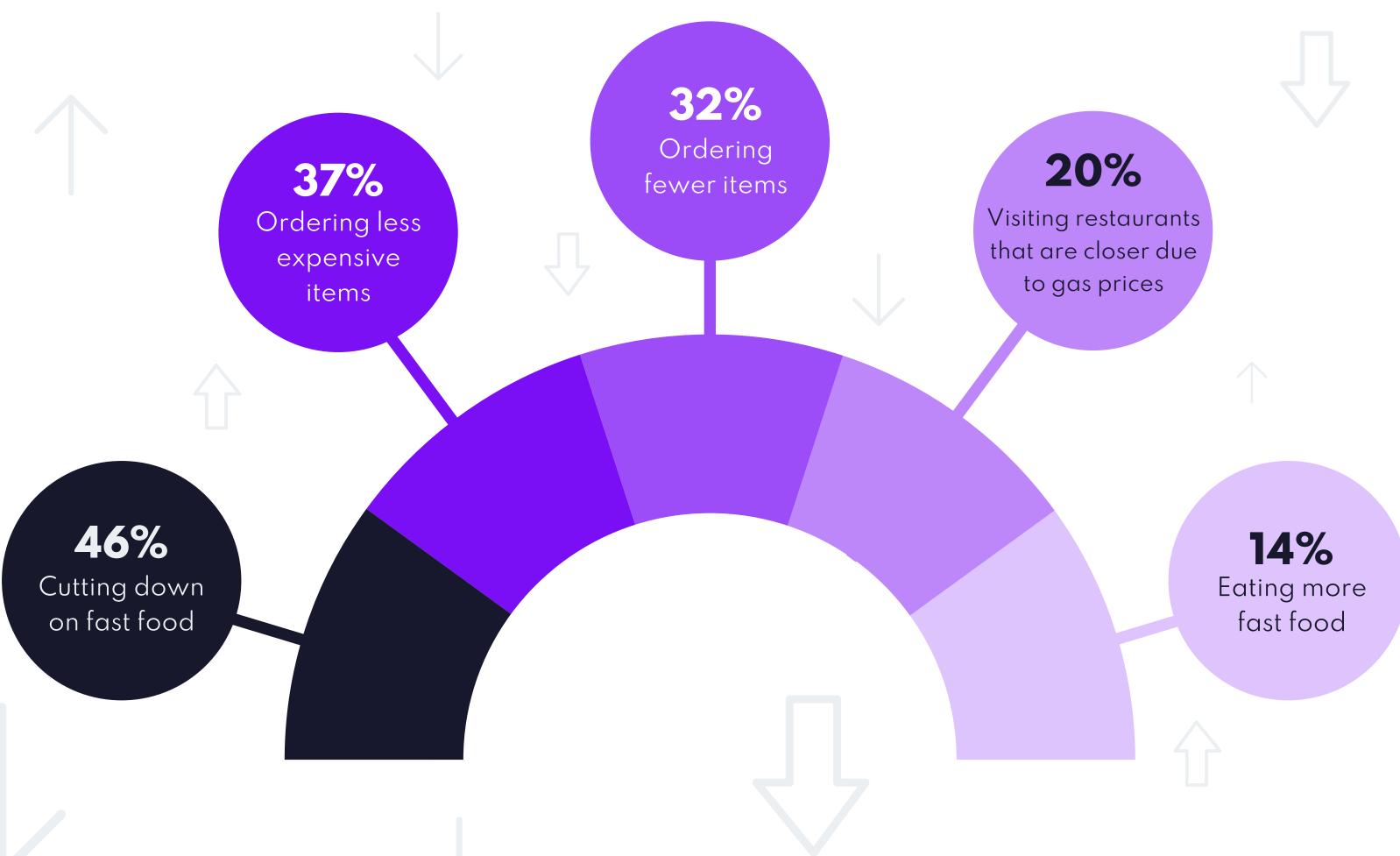


of consumers report price increases have impacted their habits.





Top changes include:





(7)

Restaurant visits have dropped the last three months due to inflation.

Reasons for drop in restaurant visits:



Fuel Cost

31% of consumers



Less Money

27% of consumers



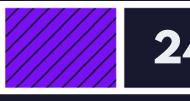


S

Most insulated food and beverage segments:



Independent coffee houses

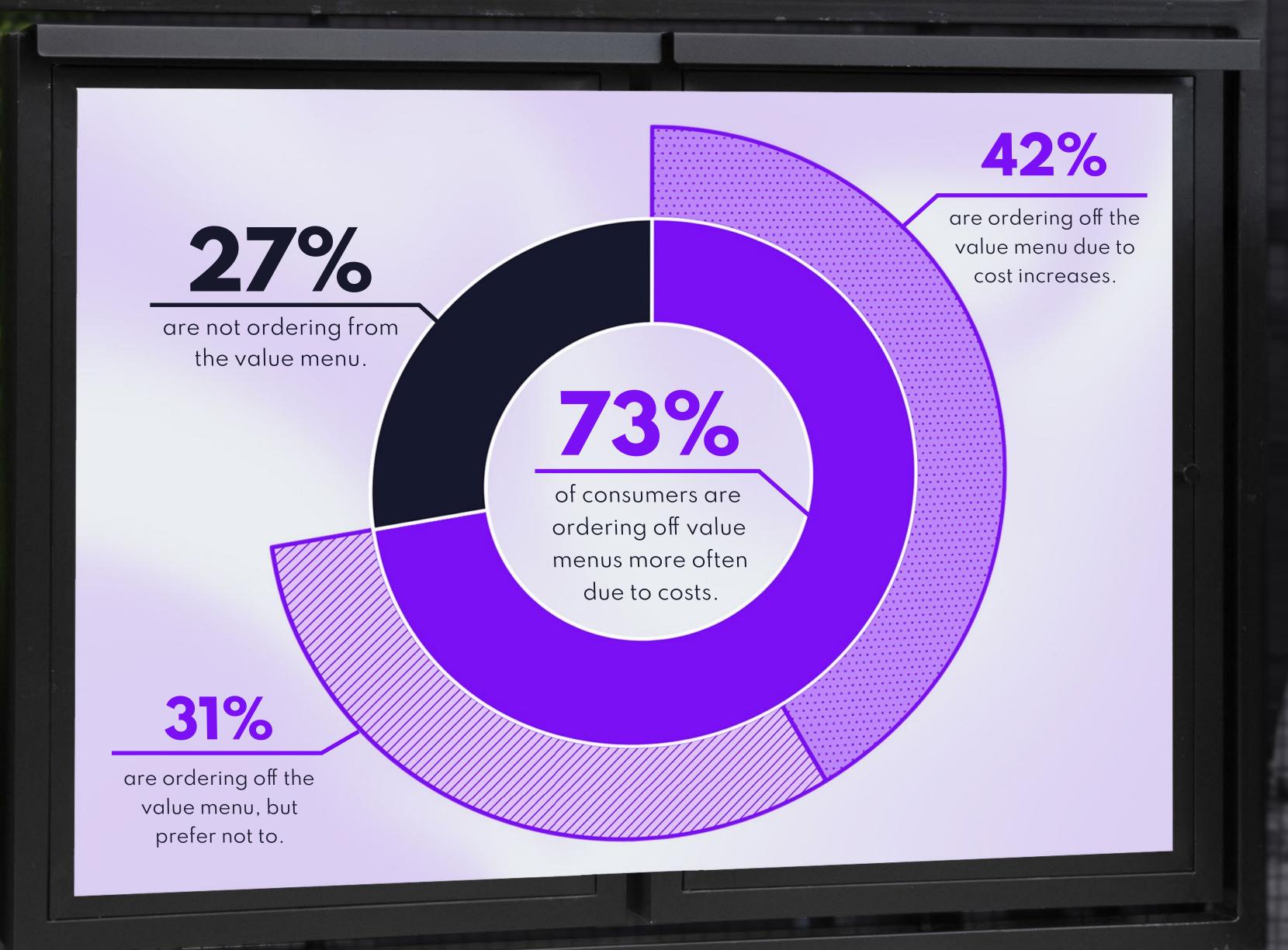


24%

Convenience stores



Value menus are popular.







of consumers have noticed that they're paying the same amount of money for smaller portion sizes.





Glossary



Mobile order pickup Ordering on mobile device and picking up at curbside, in-store, or drive-thru



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



Curbside pickup: Picking up an order in the parking lot or curb



In-store pickup (carryout): Picking up an order inside the store



Fast food: McDonald's, Burger King, Taco Bell, etc.

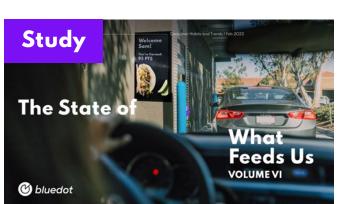


Casual dining, Sit down: Applebee's, Chili's, Olive Garden, etc.



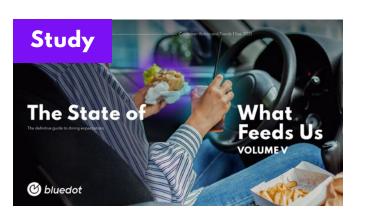
Coffee chains: Starbucks, Dunkin', Peet's Coffee, etc.

Sources



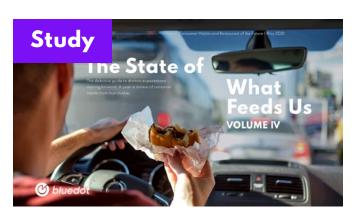
February 2022:

State of What Feeds Us VI



September 2021:

State of What Feeds Us V



May 2021:

State of What Feeds Us IV

Methodology

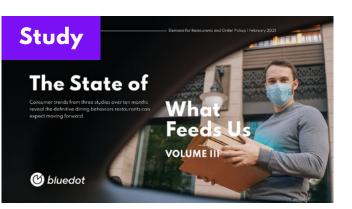
The survey was conducted via SurveyMonkey on August 4th among a national sample of 1,631 American adults aged 18 and older.

Income

Low	Middle	High
≤\$50K	\$50K - \$100K	\$100K+

Generational

Gen Z	Millennials	Gen X	Boomers
18 – 29 year olds	30 – 44 year olds	45 – 60 year olds	Over 60 year olds



February 2021:

State of What Feeds Us III



August 2020:

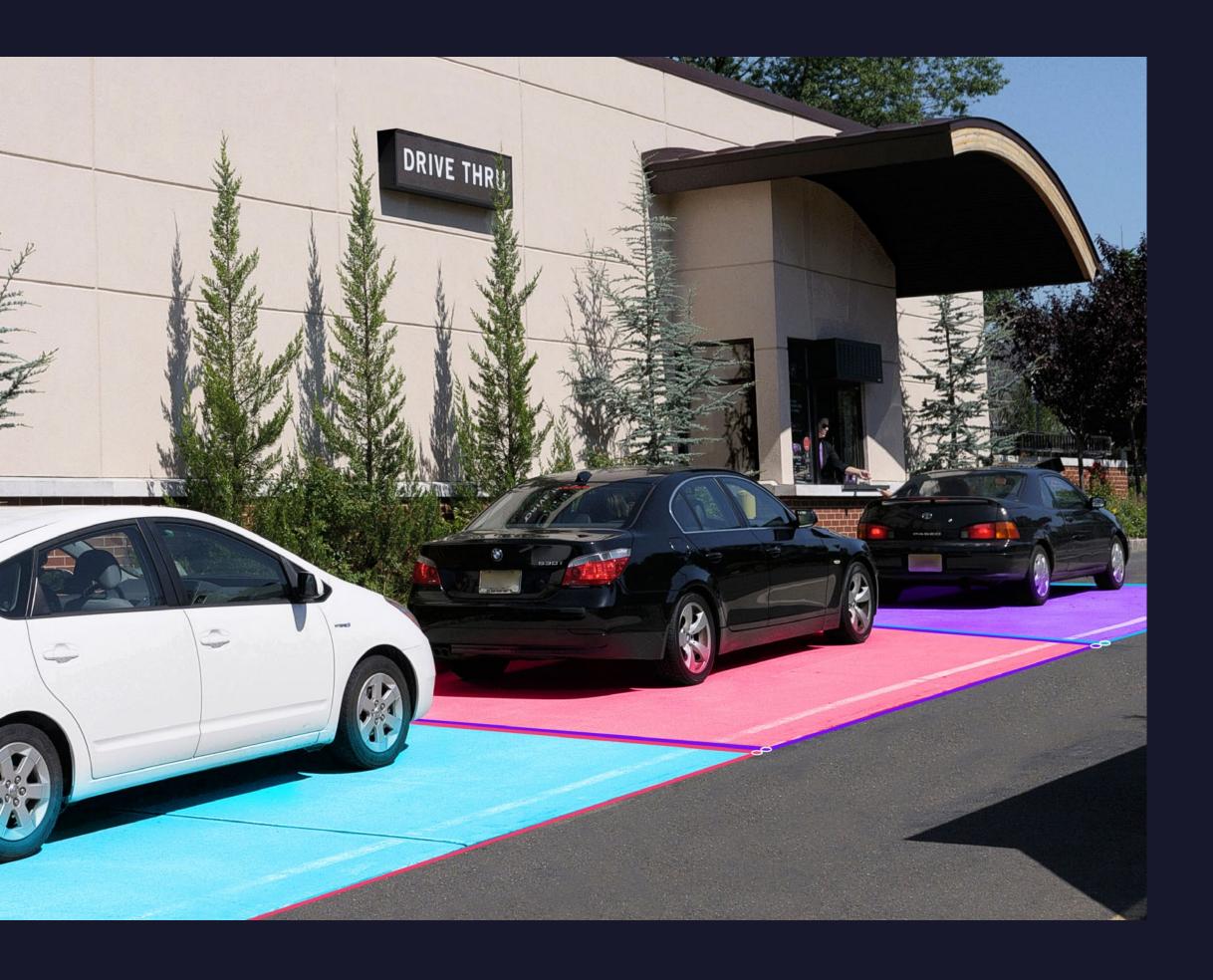
State of What Feeds Us II



April 2020:

State of What Feeds Us





About Bluedot

Bluedot's award-winning customer arrival platform powers real-time, context-rich, actionable insights for brands. The company's hyperaccurate location technology identifies exactly when and where a user arrives whether that's entering a drive-thru or store, pulling into a curbside pickup space, or at a parking lot. Bluedot enables businesses to provide timely messaging, proximity offers, loyalty identification, frictionless order pickups, gamification, and more. Easy to implement, Bluedot is inherently compliant with GDPR and CCPA.

Bluedot works across key industries including retail, restaurants, and transportation. Bluedot is trusted by many of the largest enterprises such as KFC, Dunkin', Six Flags, IAG and McDonald's among others.

For more information on Bluedot and its solutions, visit bluedot.io.



