THE INFATUATION | Bentobox

Restaurant Delivery Consumer Trend Report

Q1 Results · 04.08.2021

Partnership Overview

In the spirit of restaurant advocacy, throughout 2021, The Infatuation and BentoBox will partner on a series of four co-branded research studies with the intent of uncovering insights into the ongoing delivery/takeout habits of U.S. consumers—all culminating in a year-end trend report analysis.

x Bentobox

Key Takeaways

1.

Delivery Frequency Will Continue Despite Eases in Restrictions

Delivery and takeout ordering frequency is **relatively flat** vs. pre-Covid levels, though we saw **big increases in the 1x to 2x per week level from younger consumers.**

With more restaurants opening up and more vaccinations being administered, **frequency levels will continue**, especially among **moderate to heavy** delivery/ takeout consumers.

2.

Convenience Is the Main Reason Diners Will Continue Their Delivery/Takeout Habits.

Diners across all age levels are **enjoying the convenience of delivery** and takeout– the #1 driver of continued ordering.

But **nearly 1 in 2 also want to support their local eateries** in this challenging industry climate. **Heavy delivery consumers and affluent consumers** are the most likely to want to lend their support.

3.

Diners Will Order Directly from Restaurants If It's Easy

Nearly half of the diners surveyed said they're **more likely to order directly from a restaurant if it's easy**.

Younger segments were more likely to respond to **promotions and discounts and be deterred by delivery fees**, whereas older and more affluent segments will order directly because it's **beneficial to restaurants.**

Q1 Study Methodology

Research Objectives

To gain a better understanding of the food delivery/takeout ordering habits of U.S. consumers

Survey Design

Using Suzy Insights real-time research platform, a **screener question** was fielded among U.S. consumers, ages 18+ to **identify a base sample of "Diners"**–those who dined out at least once a week prior to Covid. "Diners" were then served a follow up survey consisting of **5 multiple-choice** questions.

Sample

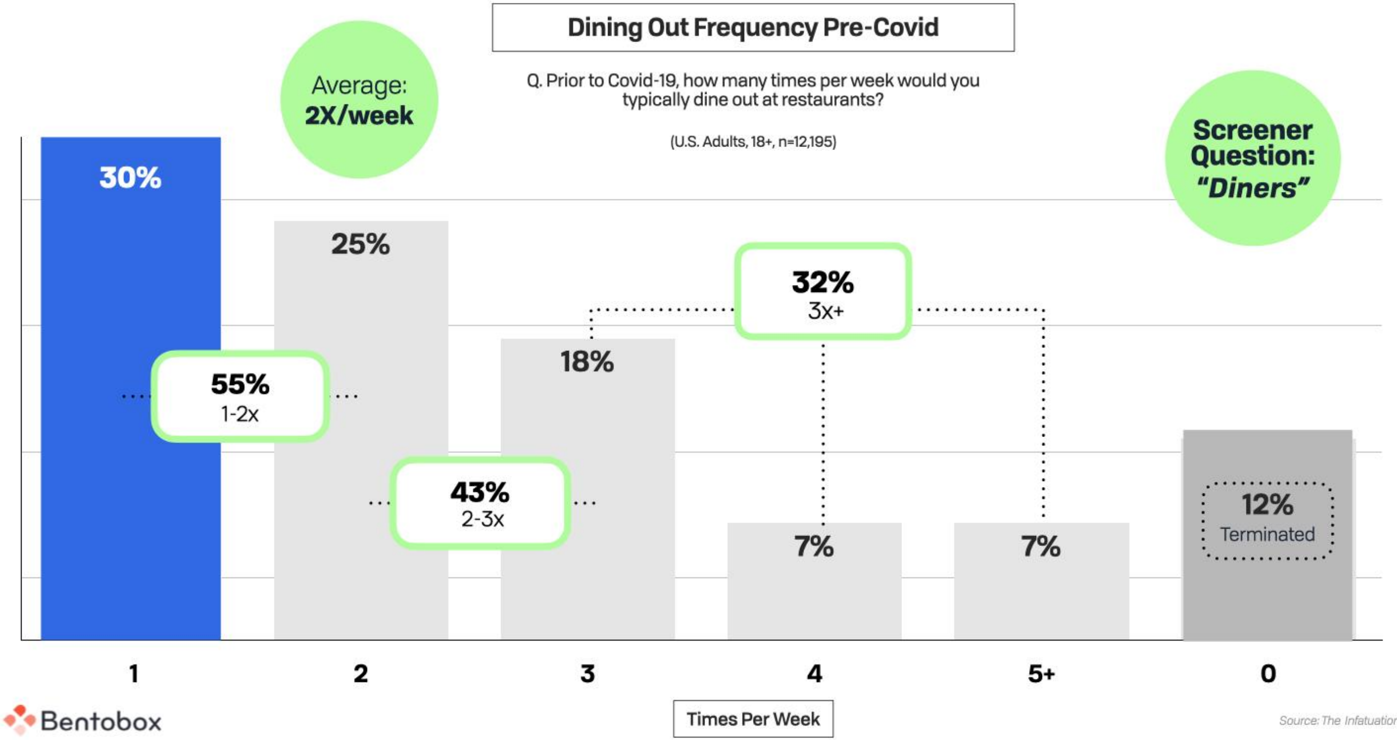
- U.S. Adults 18+
- Dined out 1+ times/week pre-Covid)
- 5-question survey, **n=1,017**

Field Dates

- March 23, 2021

Nearly 6 in 10 Americans Dined Out 2+ Times Per Week Prior to Covid

87% of the 12,000+ U.S. consumers who participated in our screener question were identified as "diners"–those who had dined out at **1+ times per week** prior to Covid.

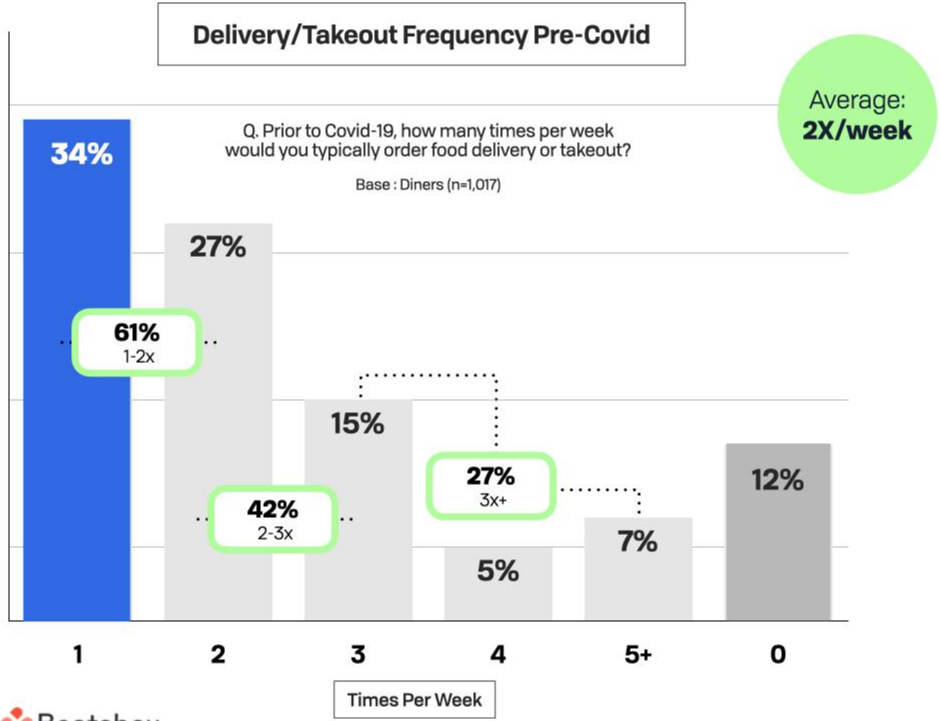


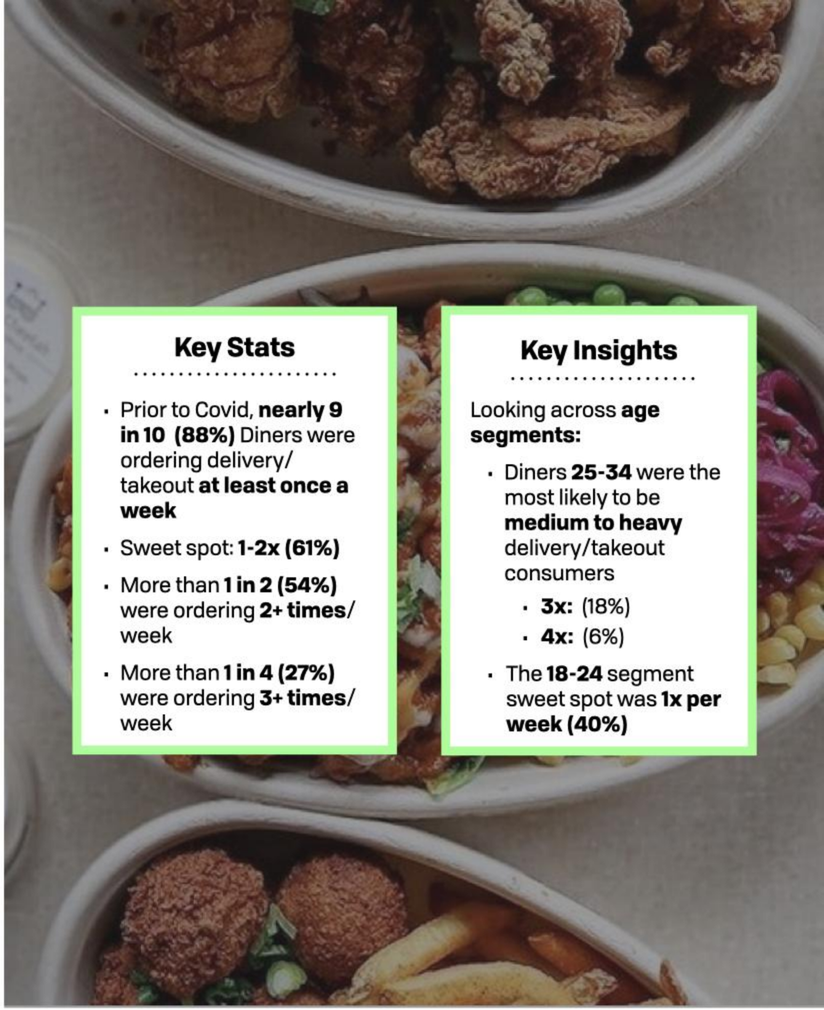
Key Stats

- **87%** of Americans **dined out 1+ times per week** prior to Covid
- **57%** dined out **2+ times** per week
- Sweet spot: **1-2x (55%)**
- Nearly **1 in 3 (32%)** dined out **3+ times**

88% Were Ordering Delivery/Takeout Pre-Covid

Pre-Covid delivery/takeout habits were on par with dining out habits, **averaging 2 times per week** for U.S. consumers. More than **1 in 2** (54%) were ordering **2+ times** per week.





Key Stats

- Prior to Covid, **nearly 9 in 10 (88%)** Diners were ordering delivery/ takeout **at least once a week**
- Sweet spot: **1-2x (61%)**
- More than **1 in 2 (54%)** were ordering **2+ times**/ week
- More than **1 in 4 (27%)** were ordering **3+ times**/ week

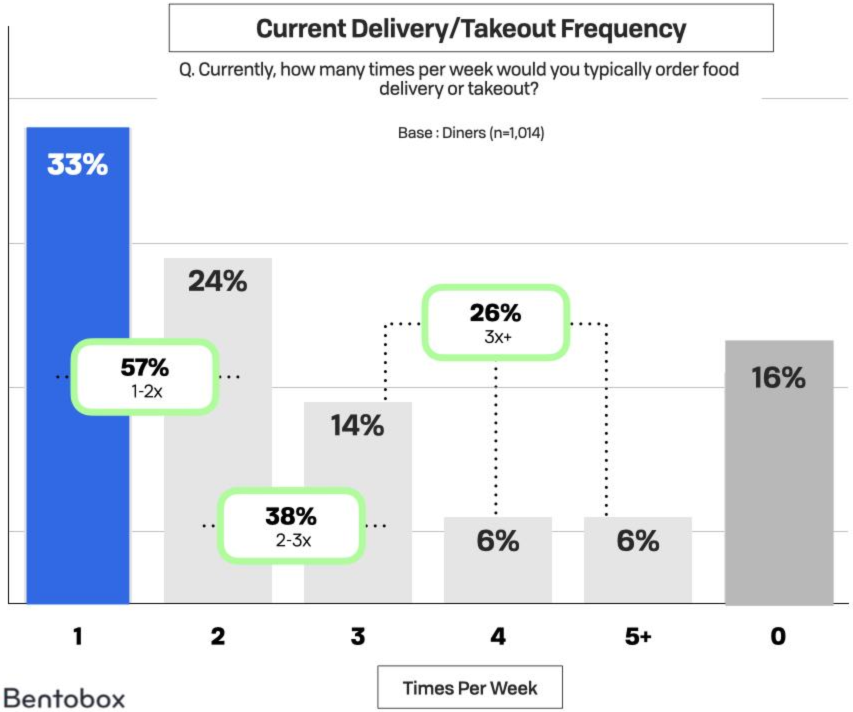
Key Insights

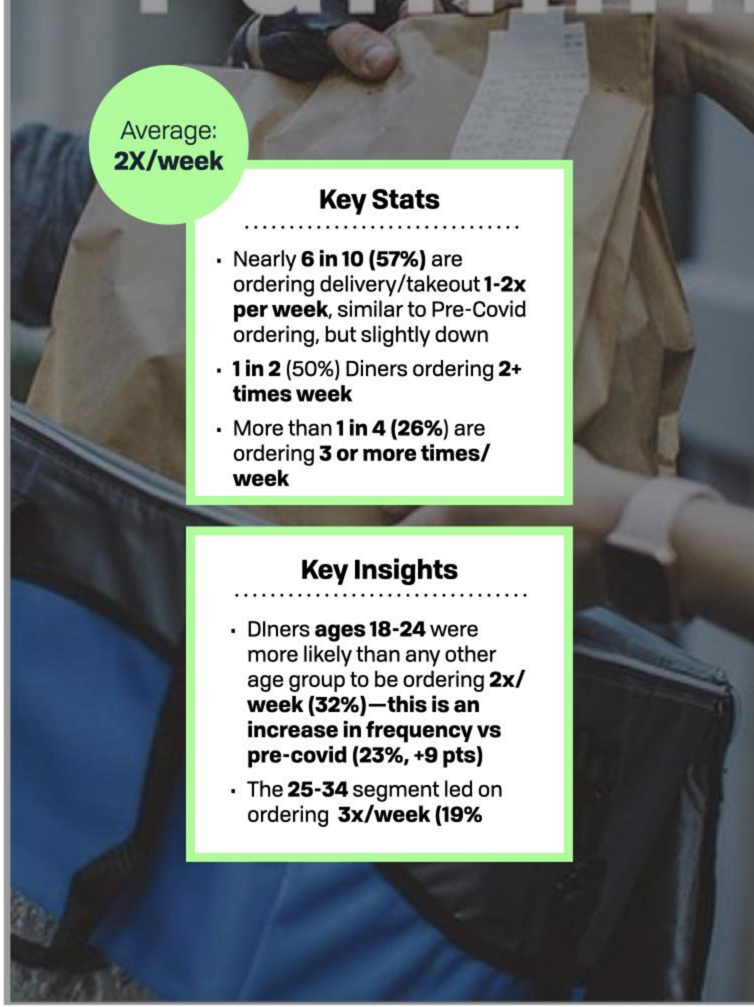
Looking across **age segments:**

- Diners **25-34** were the most likely to be **medium to heavy** delivery/takeout consumers
  - **3x:** (18%)
  - **4x:** (6%)
- The **18-24** segment sweet spot was **1x per week (40%)**

84% Are Currently Ordering Delivery/Takeout

Similar to pre-Covid behavior, Diners are **currently ordering delivery/takeout** an average of **2 times per week**.





Average: **2X/week**

Key Stats

- Nearly **6 in 10 (57%)** are ordering delivery/takeout **1-2x per week**, similar to Pre-Covid ordering, but slightly down
- **1 in 2** (50%) Diners ordering **2+ times week**
- More than **1 in 4 (26%)** are ordering **3 or more times/ week**

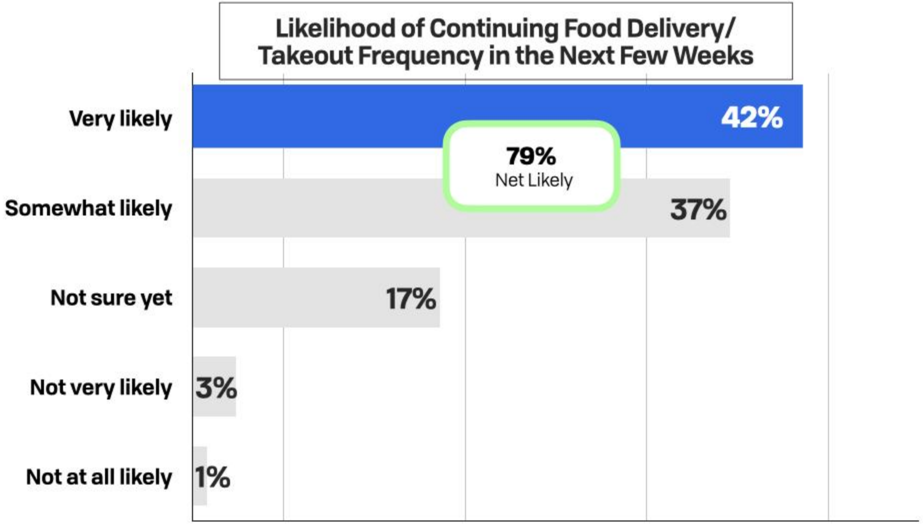
Key Insights

- DIners **ages 18-24** were more likely than any other age group to be ordering **2x/ week (32%)—this is an increase in frequency vs pre-covid (23%, +9 pts)**
- The **25-34** segment led on ordering **3x/week (19%**

Source: The Infatuation x Bentobox Consumer Restaurant Delivery Trend Report, March 2021

Nearly 8 in 10 Will Continue Ordering Delivery in the Near Future

Looking toward the next few weeks as dining starts to open up more in warmer weather, restrictions are lifted and more vaccines are administered, nearly 80% of current delivery/takeout consumers will continue to order at the same frequency.



Q. In the next few weeks, as indoor dining restrictions begin to be lifted and more vaccines are administered, how likely are you to continue ordering food delivery/takeout at the same frequency you do now?

Base : Diners, Currently Order Food Delivery 1+ Times/week (n=852)

More Frequent Current Delivery Consumers are More Likely to Continue Ordering

Current Delivery Frequency	Net Very/ Somewhat Likely	Very likely	Somewhat Likely
1	74%	37%	**37%**
2	84%	38%	**46%**
3	81%	**47%**	35%
4	83%	**57%**	25%
5+	84%	**66%**	18%

Key Insights

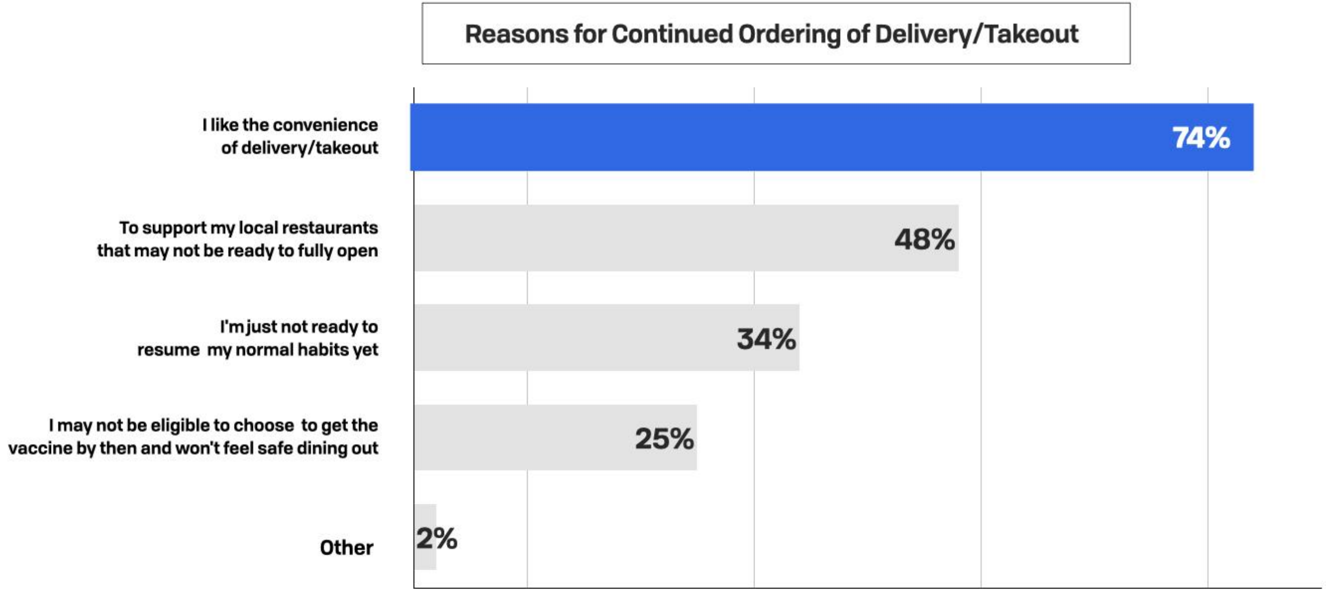
In addition to **moderate-heavy** delivery/takeout consumers strong likelihood to continue ordering, there's also a **strong likelihood among affluent consumers**:

- HHI $150K+: **56%**
- HHI $100K-150K: **47%**

Source: The Infatuation x Bentobox Consumer Restaurant Delivery Trend Report, March 2021

Convenience is the Main Driver of Continued Delivery/Takeout Habits

Nearly **3 in 4** cited **convenience** as the main motivation to continue ordering at their current frequency throughout the next few weeks–specifically by those currently ordering at the **4x/week level**. But **1 in 2** also cited **restaurant support** as a key motivation to continue the ordering habits.



Q. Which of the following are reasons you'll continue to order delivery/takeout?

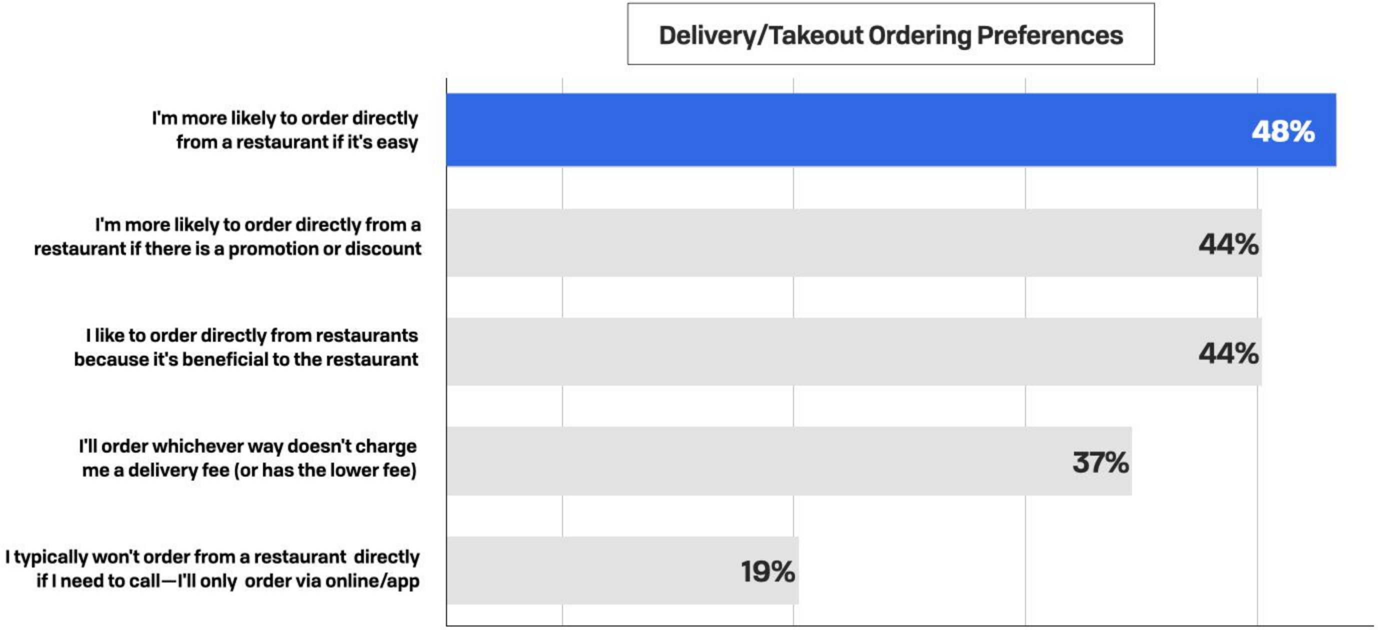
Base : Diners , Currently Order Food Delivery 1+ Times/week, 'Very' or 'Somewhat' To Continue to Order at the Same Frequency (n=671)

Key Insights

- For all age segments, '**convenience**' was **#1 response**, though highest among heavy delivery/ takeout consumers, **4x/ week (86%)** and among **A25-34 (79%)**
- Heavy delivery/takeout consumers, ordering **5x+/ week (61%)**, were the most likely to continue ordering to **support local restaurants**

Nearly 1 in 2 Diners Will Order Directly from Restaurants If It's Easy

Promotions and discounts are also an incentive to order directly, and equally as important as supporting restaurants. Less than 20% are deterred from ordering directly if they need to call the restaurant.



Q. Thinking about food delivery/pickup, please tell us which of the below statements you agree with regarding ordering directly from a restaurant vs. using a third-party app/service.

Base : Diners (n=1,000)

Key Insights

- **Younger age segments** were most likely to respond to restaurant promotions & discounts, **A18-24 (47%) & A25-34 (48%)**, and also those ordering **4x per week (52%)**
- **51%** of **A18-24** were more likely to swayed based on paying delivery fees-their **#1 response.** As age increases, importance of delivery fees decreases.

Respondent Demographic Profile

72%/28%	41	57%	61%
Female/Male	Average Age	Ages 25-44	Bachelor's Degree+

71%	1 in 3	63%	67%
Employed	HHIs $100K+	Married	Kids

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