



# Restaurant Delivery Consumer Trend Report

Q3 Results October 2021



# Overview

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In the spirit of restaurant advocacy, throughout 2021, BentoBox embarked on a series of four branded research studies with the intent of uncovering insights into the ongoing delivery/takeout habits of U.S. consumers.





# Methodology

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## 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 6 multiple-choice questions.

## Sample

- U.S. Adults 18+
- Order take out or delivery 1+ times/week
- 6-question survey, n=1,034

## Field Dates

- September 20-21, 2021





# Demographic Profile

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**79%/21%**

Female/Male

**45**

Average Age

**65%**

Ages 25-54

**51%**

Bachelor's Degree+

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**61%**

Employed

**21%**

HHIs \$100K+

**56%**

Married

**62%**

Kids



The background of the slide features two pizzas in their cardboard boxes. The pizzas are topped with tomato sauce, melted cheese, pepperoni, mushrooms, and sliced tomatoes. The boxes are open, and the pizzas are partially visible. The text 'Q3 Results' is centered over the image in a white box.

# Q3 Results



# Key Takeaways

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1.

## **Takeout/Delivery frequency down in Q3**

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Summer optimism for large-scale vaccinations and easing restrictions prompted more diners to visit restaurants in lieu of takeout/delivery.

2.

## **Amid COVID surges, consumers question future dining habits**

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As we approach the holiday season and cases continue to surge nationally, more than half of the diners surveyed will consider ordering in instead of dining out.

3.

## **Ease and convenience drive motivation for takeout/delivery**

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49% surveyed identified convenience as the #1 reason they will order takeout/delivery for the holiday season. It is also the #1 motivation for driving takeout orders directly from restaurants (46%).



# Ordering Frequency Decreases in Q3

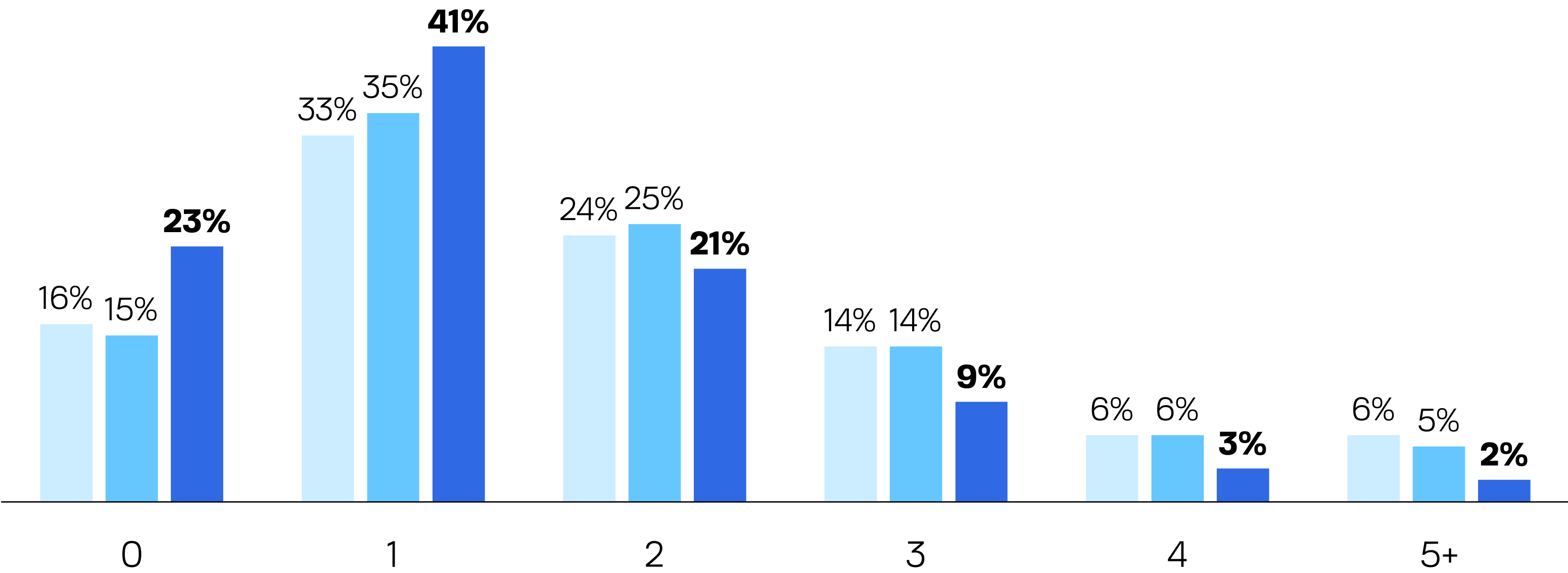
As restrictions eased, seasons changed and more became vaccinated, ordering frequency decreased at every level compared to 1H. In **Q3**, **35%** of diners ordered delivery/takeout **at least 2+/week** down from **50% in Q2**. The decrease is most dramatic amongst heavy takeout consumers.

## Current Delivery/Takeout Frequency

Q. Currently, how many times per week would you typically order food delivery or takeout?

(Base : Diners, Q1: n= 1,014, Q2: n=1,020, Q3 n= 1,034)

Q1 Q2 Q3





# In Q3 Delivery/Takeout Order Frequency Dips Below Pre-COVID Levels

In the 1H of 2021, diners mirrored their pre-COVID delivery/takeout habits. In Q3, there was an overall *decrease* of ordering delivery/takeout vs. pre-pandemic levels, driven by heavy takeout consumers (2+ times/week). There was an *increase*, however, for those *ordering 1+ time/week* vs. pre-pandemic levels.

Weekly Delivery/Takeout Frequency							
	Pre- COVID	Q1	Q2	Q3	Q3 vs. Q2+/-	Q3 vs. Q1+/-	Q3 vs. Pre-COVID +/-
0	12%	16%	15%	<b>23%</b>	+8	+7	+11
1	34%	33%	35%	<b>41%</b>	+6	+8	+7
2	27%	24%	25%	<b>21%</b>	-4	-3	-6
3	15%	14%	14%	<b>9%</b>	-5	-5	-6
4	5%	6%	6%	<b>3%</b>	-3	-3	-2
5+	7%	6%	5%	<b>2%</b>	-3	-4	-5
1+	88%	84%	85%	<b>76%</b>	-8	-7	-11

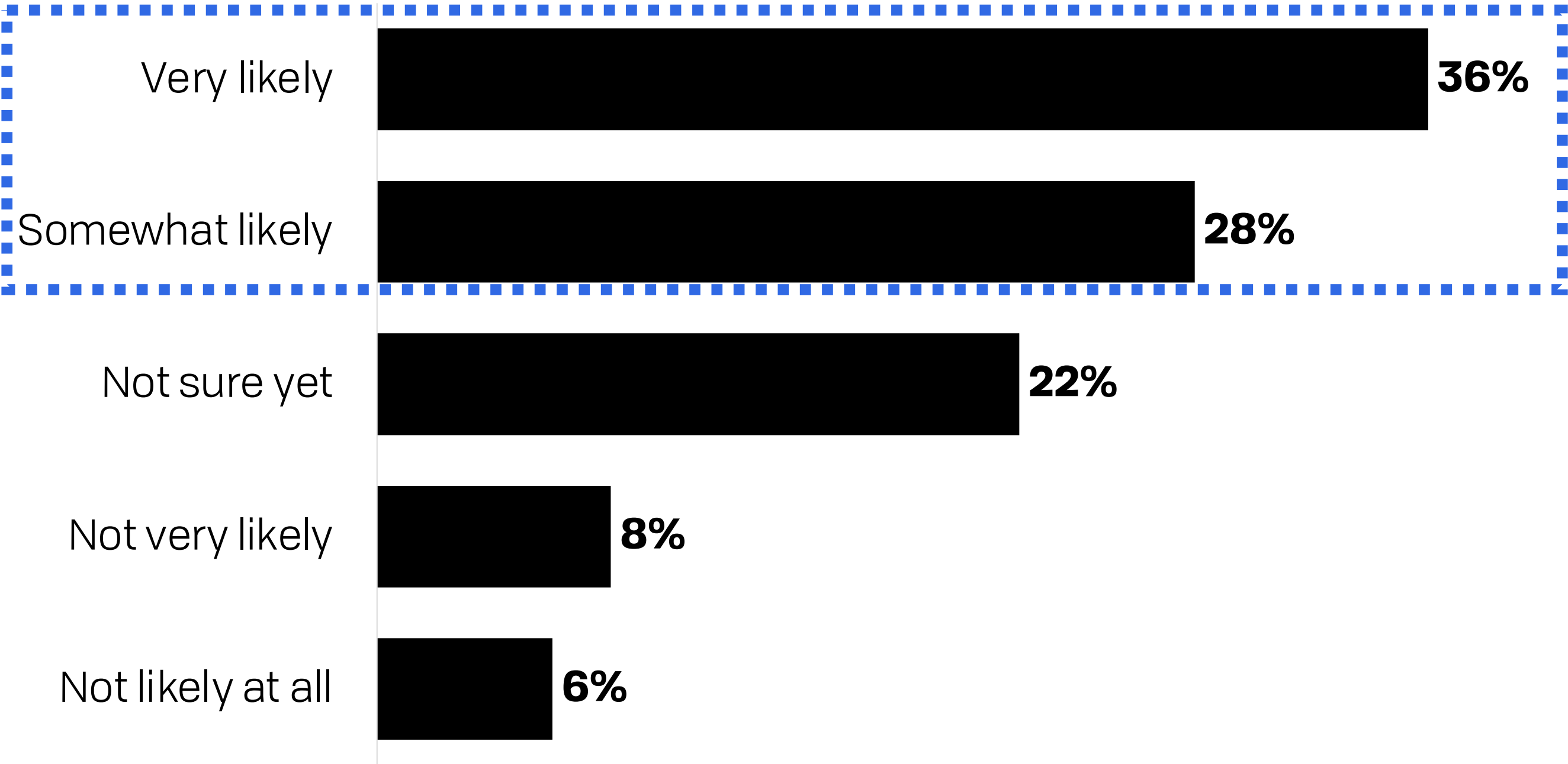


# Takeout & Delivery Routines Expected To Rebound As Cases Surge

Diners anticipate their dining routines will change given surging cases for all ages. Overall, 64% are likely to consider ordering in instead of dining out.

**Q: Given the Delta variant and surging cases nationally, how likely are you to consider ordering in instead of dining out over the next few months?**

(Base : Diners, Currently Order Food Delivery 1+ Times/week N= 776)



	All	A18-24	A25-34	A35-49	A50-64	A65+
Very/ Somewhat Likely	64%	68%	66%	64%	63%	57%
Not Sure	22%	18%	21%	20%	24%	28%
Not Very/At All Likely	15%	14%	14%	16%	13%	16%

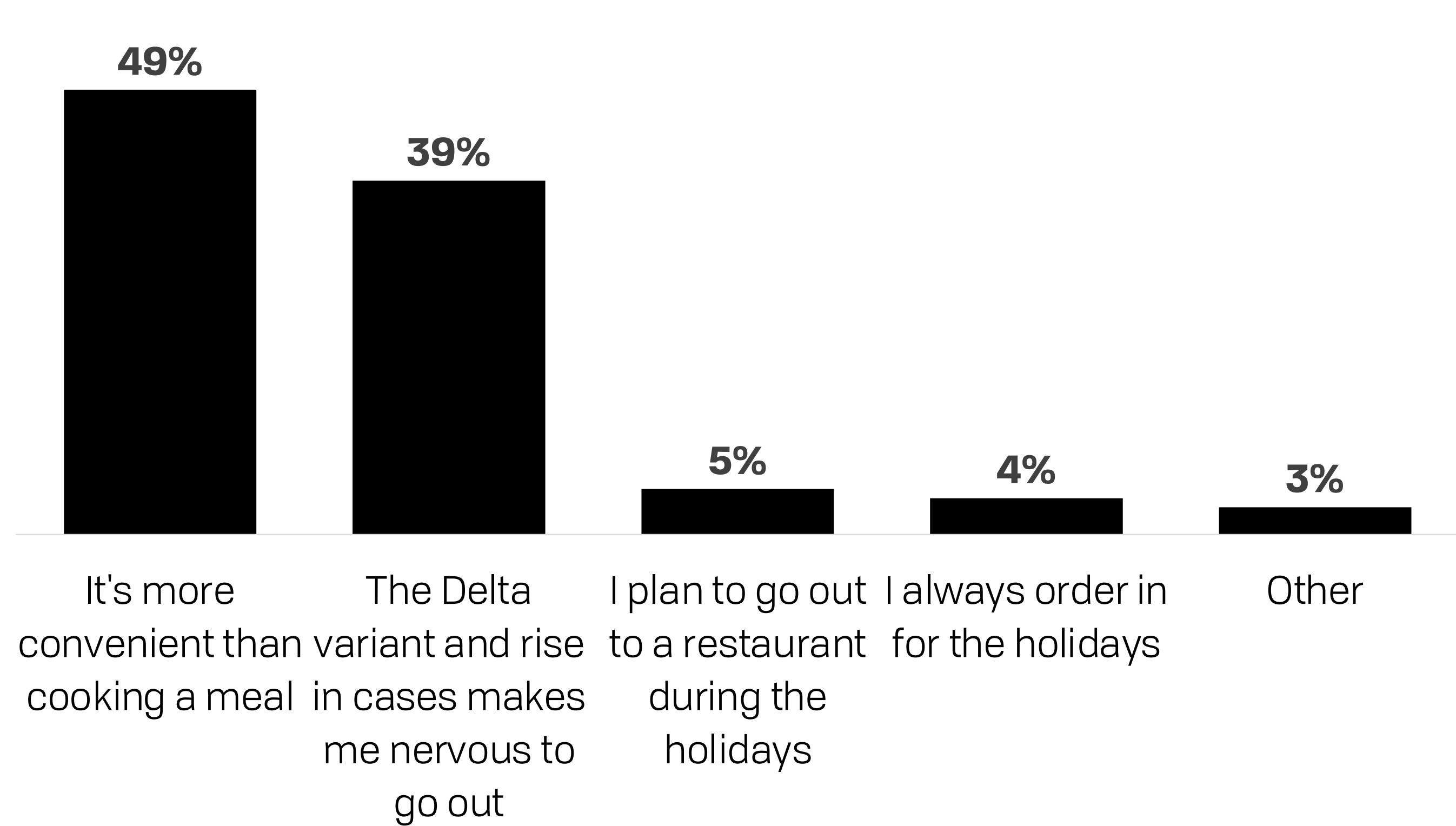


# Diners Seek Convenience During the Holidays

Convenience rules as the #1 driver of takeout and delivery during the holidays. However, safety concerns are still high across the board, with highest hesitancy rates among the older diners.

**Q: Which of the following are reasons you'll continue to order delivery/takeout this holiday season?**

(Base : Diners, Currently Order Food Delivery 1+ Times/week N= 490)



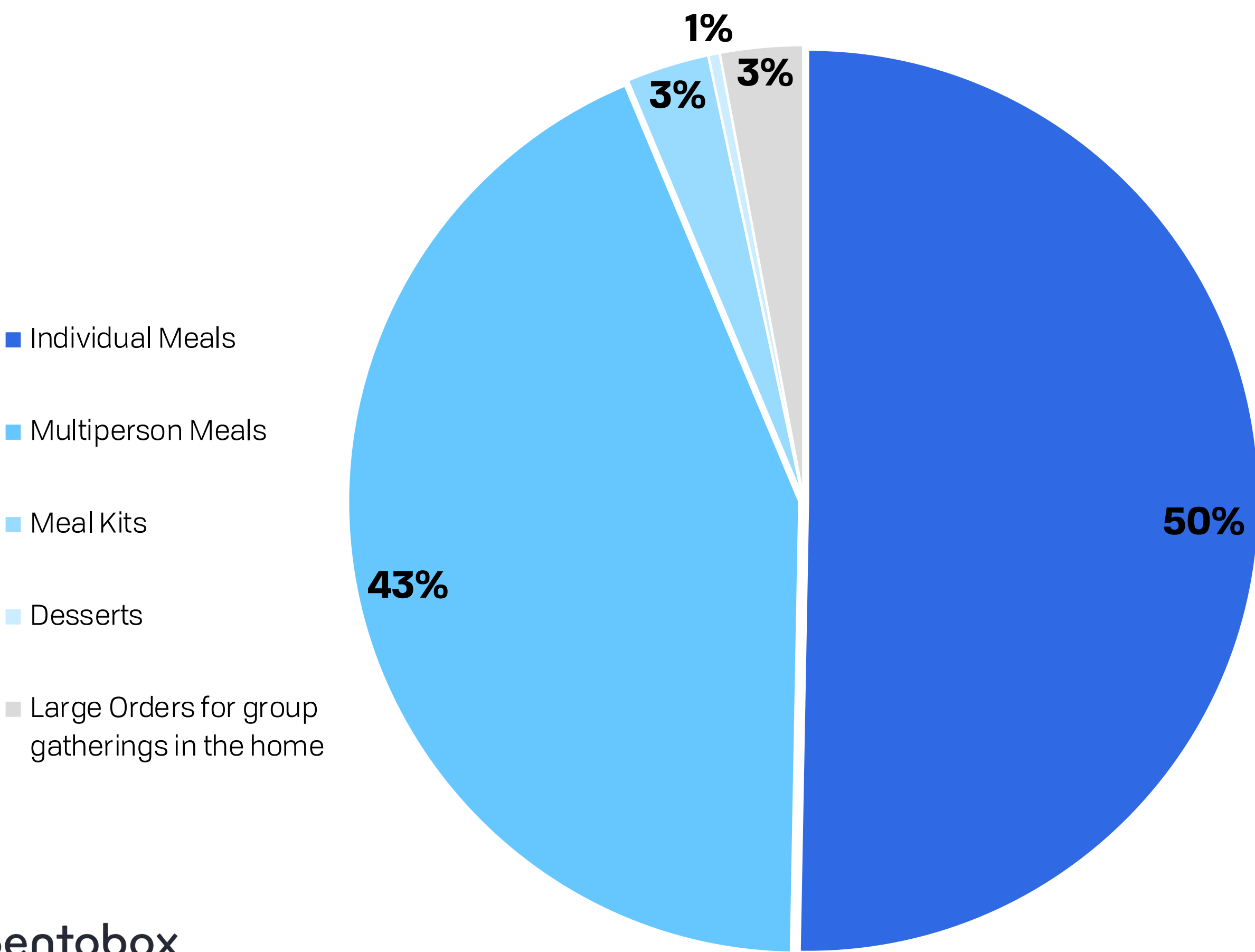
Reasons	A18-24	A25-34	A35-49	A50-64	A65+
It's more convenient than cooking a meal	58%	56%	47%	47%	42%
The Delta variant and rise in cases makes me nervous to go out	24%	33%	42%	42%	49%
I always order in for the holidays	3%	7%	4%	2%	0%
I plan to go out to a restaurant during the holidays	9%	4%	6%	5%	2%
Other	6%	1%	2%	5%	7%



# Diners Prioritize Individual or Multi-Person Meals When Ordering

**93%** of takeout orders are individual or multi-person meals for the household. This again suggests the primary motivation of ordering is convenience for themselves and their households. Younger diners, however, are most likely to experiment with meal kits.

Q. Currently, what type of meals are you ordering via food delivery or takeout?  
(Base : Diners, Currently Order Food Delivery 1+ Times/week N= 780)



	A18-24	A25-34	A35-49	A50-64	A65+
Individual meals	51%	52%	52%	43%	52%
Multi-person meals for the household	44%	34%	45%	50%	42%
Meal kits (from restaurants)	3%	10%	2%	3%	2%
Desserts	0%	2%	0%	0%	1%
Large order for group gathering in the home	3%	2%	1%	5%	2%



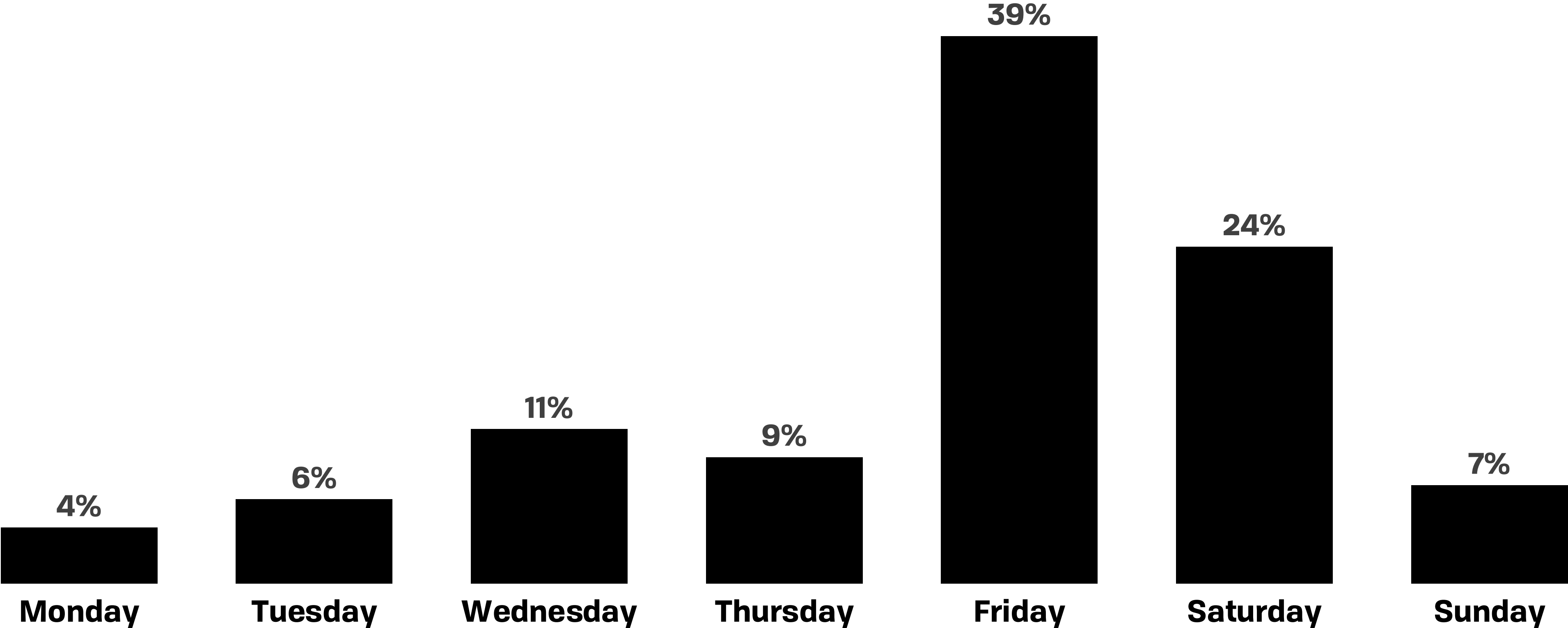
# Wednesdays And Fridays Are Top Days For Takeout

Diners prefer to kick off their weekends with takeout on Friday evenings, and Wednesday ranks highest weekday for orders.

## Order Placement Preferences

Q. What days of the week do you typically order via food delivery or takeout?

(Base : Diners, Currently Order Food Delivery 1+ Times/week N=785)



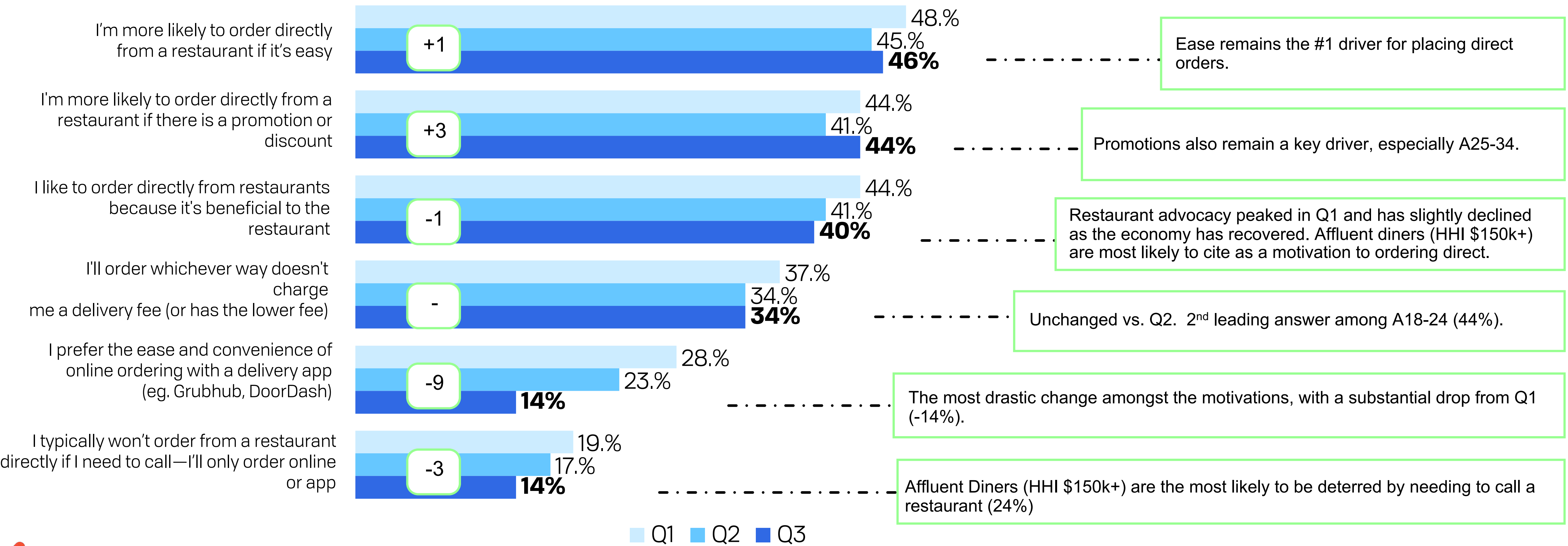


# Ease and Promotion Drives Direct Ordering

**90% of diners** are motivated to order directly because of convenience and/or promotions. Third party delivery apps continued a downward trend with only 14% now motivated (-28% vs. Q1). Other declining trends to highlight are consumers willingness to call direct (-5%) and being highly motivated by restaurant advocacy (-4%) vs. Q1.

## Order Placement Preferences

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 : N=490)







**Thank You!**