Restaurant Delivery Consumer Trend Report

Q4 Results, February 2022

PROOF OF VACCINATION REQUIRED
Partnership Overview

In the spirit of restaurant advocacy, The Infatuation and BentoBox partnered 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.
Methodology

Research Objectives
To gain a better understanding of the delivery/takeout ordering habits of U.S. consumers in hopes of garnering industry press.

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+
- Order take out or delivery 1+ times/week
- 5-question survey, n=1,013

Field Dates
- January 12-13, 2022
Demographic Profile

79%/21% Female/Male

42 Average Age

70% Ages 25-54

40% Bachelor’s Degree+

56% Employed

30% HHIs $75K+

52% Married

61% Kids

Source: The Infatuation x BentoBox Consumer Restaurant Delivery Trend Report Q421
Q4 Results
Key Takeaways

1. Diners anticipate more dining in and out in 2022

   Despite concerns about surging cases nationally, more than half of diners surveyed plan on dining/ordering takeout more to significantly more in 2022. Diners order takeout daily and more heavily on the weekend.

2. Dining motivations and opinions change amidst changing protocols

   Diners agree that restaurants are still having a challenging time doing business. As cities require proof of vaccination to dine inside restaurants, some diners are unsure. When ordering takeout, many order directly from the restaurant because it’s beneficial to their business.

3. Diners Expect Restaurant Challenges to Continue in 2022

   The vast majority of diners believe restaurants face challenges this year. More diners than ever reported supporting restaurants as a key factor in their ordering delivery and takeout.

Source: The Infatuation x BentoBox Consumer Restaurant Delivery Trend Report, Q121, Q221, Q321, Q421
Restrictions lift and Frequency Shifts

In the first half of 2021, 85% of diners were ordering takeout or delivery more than once a week. As restrictions were lifted and more became vaccinated, we saw a dip in frequency in Q3 (76%) and now, a slight increase in Q4 (79%).

Current Delivery/Takeout Frequency
Q. Currently, how many times per week would you typically order food delivery or takeout?

Source: The Infatuation x BentoBox Consumer Restaurant Delivery Trend Report, Q121, Q221, Q321, Q421
Diners Expect to Order More in 2022

57% of diners expect to order somewhat more to significantly more from restaurants and 3rd party apps in 2022.

Order Placement Preferences

Q. How do you expect your habits with ordering directly from a restaurant vs. using a third-party app or service (eg. Grubhub, DoorDash) to change in 2022?

(Base: Diners, Currently Order Food Delivery 1+ Times/week N=1003)

![Bar chart showing preferences]

<table>
<thead>
<tr>
<th>Expecting to Dine/Order More to Significantly More in 2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24</td>
</tr>
<tr>
<td>25-34</td>
</tr>
<tr>
<td>35-49</td>
</tr>
<tr>
<td>50-64</td>
</tr>
<tr>
<td>65+</td>
</tr>
</tbody>
</table>

Source: The Infatuation x BentoBox Consumer Restaurant Delivery Trend Report Q421
Diners Order-In Daily and More Heavily on the Weekends

68% order takeout or delivery on Friday and more than half order on Saturday.

### 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=1013)

<table>
<thead>
<tr>
<th>Day</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Friday</td>
<td>68%</td>
</tr>
<tr>
<td>Saturday</td>
<td>56%</td>
</tr>
<tr>
<td>Sunday</td>
<td>31%</td>
</tr>
<tr>
<td>Wednesday</td>
<td>23%</td>
</tr>
<tr>
<td>Thursday</td>
<td>22%</td>
</tr>
<tr>
<td>Tuesday</td>
<td>18%</td>
</tr>
<tr>
<td>Monday</td>
<td>17%</td>
</tr>
</tbody>
</table>

Source: The Infatuation x BentoBox Consumer Restaurant Delivery Trend Report Q421
Dining Intentions with Vaccination Proof

Restaurant dining with required proof of vaccinations has left 1 in 10 are unsure of how they plan to dine. 54% of diners intend to maintain their current dining habits and 1 in 4 plan on ordering more takeout.

Dining Intentions
Q. As more cities require proof of vaccination to dine inside of their restaurants, are you planning to dine inside of restaurants more, order takeout more, or maintain your current habits?
(Base: Diners, Currently Order Food Delivery 1+ Times/week N=1007)

<table>
<thead>
<tr>
<th>Age</th>
<th>Dine in restaurants</th>
<th>Order takeout more</th>
<th>Maintain current habits</th>
<th>Not sure</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24</td>
<td>16%</td>
<td>34%</td>
<td>39%</td>
<td>12%</td>
</tr>
<tr>
<td>25-34</td>
<td>10%</td>
<td>31%</td>
<td>49%</td>
<td>10%</td>
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<td>35-49</td>
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<td>23%</td>
<td>57%</td>
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<td>50-64</td>
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<td>20%</td>
<td>62%</td>
<td>9%</td>
</tr>
<tr>
<td>65+</td>
<td>10%</td>
<td>28%</td>
<td>52%</td>
<td>10%</td>
</tr>
</tbody>
</table>

Source: The Infatuation x BentoBox Consumer Restaurant Delivery Trend Report Q421
Restaurants Continue to Face Challenges in Our Current Environment

84% of Diners agree that restaurants are still having a challenging time doing business

Q. Which of the following options best describes your feelings with the following statement: “I feel that despite what’s going on currently, ever since the beginning of the COVID pandemic restaurants are still having a challenging time doing business.”

(Base: Diners, Currently Order Food Delivery 1+ Times/week N=1009)

- Strongly Agree: 43%
- Agree: 41%
- Neutral: 13%
- Disagree: 2%
- Strongly disagree: 1%

Source: The Infatuation x BentoBox Consumer Restaurant Delivery Trend Report Q421
Diners are Motivated to Order Direct

Diners are more likely to order directly from a restaurant because it’s beneficial to the restaurant rather than for ease or discount. Delivery apps gained slight preference vs. Q3. Fewer are concerned about fees or the need to call.

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.

- I’m more likely to order directly from a restaurant if it’s easy
- I’m more likely to order directly from a restaurant if there is a promotion or discount
- I like to order directly from restaurants because it’s beneficial to the restaurant
- I’ll order whichever way doesn’t charge me a delivery fee (or has the lower fee)
- I prefer the ease and convenience of online ordering with a delivery app (e.g. Grubhub, DoorDash)
- I typically won’t order from a restaurant directly if I need to call—I’ll only order online or app

Source: The Infatuation x BentoBox Consumer Restaurant Delivery Trend Report Q421
### Ordering frequency quarter-over-quarter

#### Weekly Delivery/Takeout Frequency

<table>
<thead>
<tr>
<th>Delivery/Takeout orders</th>
<th># of Takeout orders</th>
<th>Pre-COVID</th>
<th>Q1</th>
<th>Q2</th>
<th>Q3</th>
<th>Q4</th>
<th>Q4 vs. Q3 +/-</th>
<th>Q4 vs. Q2 +/-</th>
<th>Q4 vs. Q1 +/-</th>
<th>Q4 vs. Pre-COVID +/-</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>12%</td>
<td>16%</td>
<td>15%</td>
<td>23%</td>
<td>21%</td>
<td></td>
<td>-2%</td>
<td>+6%</td>
<td>+5%</td>
<td>+9%</td>
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<tr>
<td>1</td>
<td>34%</td>
<td>33%</td>
<td>35%</td>
<td>41%</td>
<td>40%</td>
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</tr>
<tr>
<td>2</td>
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<td>24%</td>
<td>25%</td>
<td>22%</td>
<td>22%</td>
<td></td>
<td>0%</td>
<td>-3%</td>
<td>-2%</td>
<td>-5%</td>
</tr>
<tr>
<td>3</td>
<td>15%</td>
<td>14%</td>
<td>14%</td>
<td>9%</td>
<td>11%</td>
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<td>-3%</td>
<td>-3%</td>
<td>-4%</td>
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<td>6%</td>
<td>6%</td>
<td>3%</td>
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<td></td>
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<td>-3%</td>
<td>-3%</td>
<td>-2%</td>
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<tr>
<td>3+</td>
<td>27%</td>
<td>26%</td>
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<td>-3%</td>
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<td>84%</td>
<td>85%</td>
<td>76%</td>
<td>79%</td>
<td></td>
<td>+3%</td>
<td>-6%</td>
<td>-5%</td>
<td>-9%</td>
</tr>
</tbody>
</table>

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Thank You!