



OFF-PREMISES RESTAURANT TRENDS - 2025



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METHODOLOGY

This report is primarily based on surveys of restaurant operators and consumers, fielded by National Restaurant Association economists.

Restaurant segment definitions:

The survey data in this report categorizes restaurants in 2 broad segments: fullservice restaurants and limited-service restaurants. Within each segment, there are 3 categories of concepts:

- Fullservice restaurants: family dining, casual dining and fine dining
- Limited-service restaurants: quickservice, fast casual and coffee & snack

When responding to surveys, restaurant operators were asked to self-classify their operation into one of these 6 categories.

Definition of Generations in this report:

- Gen Z Adult (18-28)
- Millennial (29-44)
- Gen X (45-60)
- Baby Boomer (61-79)

OFF-PREMISES RESTAURANT TRENDS ■ 2025

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INTRODUCTION



Ordering takeout, delivery and drive-thru is a thread in the fabric of life for many consumers. Many of these consumers—especially young adults—aren't just occasional users of off-premises offerings. Many use it every day—and some even multiple times a day. For them, it's not just a daily diversion. It's an essential part of their lifestyle.

The off-premises market has grown significantly in recent years, but there's still ample room for expansion in the years ahead. That's because although consumers express satisfaction with their current off-prem options, a solid majority wish they had even more choices in their community. And a strong majority of consumers say they'd use off-premises more often if they had the money to pay for it, meaning there's pent-up demand.

Restaurant operators looking to boost their off-premises business need to know who these consumers are, how they decide where to eat, and what motivates them to come back day after day. This report explores those questions and offers some strategies that operators can use to set themselves apart from their competitors.



PANDEMIC PIVOT LOOKS TO BE PERMANENT

In the early months of the pandemic, consumers accessed restaurants primarily through off-premises options. But even as the pandemic waned, off-premises retained a larger share of overall customer traffic than it had in 2019.

The off-premises share of total customer traffic in the fullservice segment was 30% in 2024, up from just 19% in 2019, according to data from Circana/CREST®. Takeout, delivery and drive-thru all represent a larger share of fullservice traffic now than they did in 2019.

In the limited-service segment, the off-premises share of customer traffic was 83% in 2024, up from 76% in 2019. Delivery and drive-thru both represent a larger share of customer traffic in the limited-service segment than they did in 2019.

OFF-PREMISES SHARE OF TOTAL CUSTOMER TRAFFIC

OFF-PREMISES CATEGORY	FULLSERVICE RESTAURANTS		LIMITED-SERVICE RESTAURANTS	
	2019	2024	2019	2024
TOTAL OFF-PREMISES	19%	30%	76%	83%
• TAKEOUT	16%	24%	31%	31%
• DRIVE-THRU	1%	2%	41%	43%
• DELIVERY	2%	5%	4%	9%

Source: Circana/CREST®
Note: Columns may not sum precisely due to rounding.

OPERATORS RESPOND TO CONSUMER DEMAND

Off-premises business has become increasingly essential for many restaurants as well. Operators continue to respond to rising consumer demand by providing an expanded array of off-premises offerings—many designed to meet consumers where they are.

To support this evolving business model, 40% of limited-service operators and 30% of fullservice operators made changes to their restaurants' inside space and/or parking lot to accommodate off-premises orders during the past few years.

The results were reflected in the sales numbers: 58% of limited-service operators and 41% of fullservice operators say off-premises represents a larger proportion of their total sales now than it did in 2019. 1 in 5 operators say off-premises makes up a smaller share of their business now than it did in 2019.

OFF-PREMISES SALES

OPERATORS REPORT THEIR TOTAL OFF-PREMISES SALES (AS A % OF TOTAL SALES) IN 2024 COMPARED WITH 2019

OFF-PREMISES AS A % OF TOTAL SALES	FULLSERVICE RESTAURANTS	LIMITED-SERVICE RESTAURANTS
HIGHER THAN 2019	41%	58%
LOWER THAN 2019	22%	19%
ABOUT THE SAME AS 2019	37%	23%

Source: National Restaurant Association

TOP TAKEAWAYS

KNOW YOUR CUSTOMERS— AND HOW THEY PREFER TO ORDER

For restaurant operators looking to boost their off-premises business, knowing their prime customer base is a key to success. Off-premises customers tend to be frequent users, so it's important to target the right demographics.

In general, consumers are more likely to take out and drive-thru than order delivery: 47% of adults say they pick up takeout food or beverages from restaurants, coffee shops, snack places or delis at least once a week, while 42% report similarly about drive-thru use. In comparison, 37% of adults say they order delivery at least once a week.

These numbers vary significantly however by age group. Younger adults are by far the most frequent users of off-premises, with a majority ordering it at least once a week. [See pages 17, 25 and 30 in the delivery, takeout and drive-thru sections for more details.]

It's also important to know how consumers prefer to order off-premises. Younger customers prefer mobile apps, while older customers prefer in-person ordering. Depending on a restaurant's customer base, it's important to meet customers where they are in terms of ordering preferences. [For more details on ordering preferences, see pages 14–15.]

HOW OFTEN CONSUMERS ORDER DELIVERY, TAKEOUT OR DRIVE-THRU FROM RESTAURANTS, COFFEE SHOPS, SNACK PLACES OR DELIS

FREQUENCY	DELIVERY	TAKEOUT	DRIVE-THRU
MULTIPLE TIMES A DAY	2%	2%	2%
DAILY	5%	5%	5%
SEVERAL TIMES A WEEK	17%	22%	18%
ONCE A WEEK	13%	18%	17%
AT LEAST ONCE A WEEK	37%	47%	42%
SEVERAL TIMES A MONTH	14%	20%	19%
ONCE A MONTH	10%	11%	11%
ONCE EVERY FEW MONTHS	10%	10%	11%
ONCE OR TWICE A YEAR	8%	5%	7%
NEVER	22%	7%	9%

Source: National Restaurant Association • Base: All adults
Note: Columns may not sum precisely due to rounding.



OFF-PREMISES CUSTOMERS ARE MOTIVATED BY VALUE OFFERINGS

Value remains top of mind for consumers, and this is particularly the case for off-premises customers. These are the value deals that resonate with delivery, takeout and drive-thru customers:

Daily specials, combo meals, and BOGO: The most popular value offerings for each of the 3 customer groups were daily specials or limited-time offers at a reduced price, value/combo meals at a reduced price, and buy-one-get-one-free (BOGO) offers. More than 8 in 10 off-premises customers say they'd take advantage of each of these 3 offerings if they were available at a restaurant in their area.

Off-peak patronage: Operators looking to boost business during slow times have a hungry customer base at the ready—provided they get a discount. Across all 3 off-premises customer groups, roughly 8 in 10 consumers say they'd take advantage of discounts for dining on less busy days of the week or less busy times of the day.

Discounted drinks or dessert: 8 in 10 consumers across all 3 off-premises customer groups say they'd take advantage of a discounted add-on like a drink or dessert, if it was offered along with the purchase of a regularly priced entrée.

Portion choices: Consumers were given 2 options to get value through portion sizes. They can order a smaller-sized portion for a reduced price, or they can get a larger-sized portion while still paying the regular price. Both options garnered interest from more than 7 in 10 off-premises customers, with younger adults more likely to be interested.

Cash discounts: 7 in 10 consumers across all 3 off-premises customer groups say they'd take advantage of a discount for paying in cash rather than with a credit or debit card.

Real-time specials: Restaurant operators that don't want to offer full-time discounts can offer flexible specials, such as lower prices or a free food or drink item, that go into effect on days when the restaurant is not as busy.

Note: For more details, visit the consumer profiles in the delivery, takeout and drive-thru sections, pages 21, 28 and 33.



TOP TAKEAWAYS

EXPAND BEYOND TRADITIONAL MENU OFFERINGS TO DRIVE TRAFFIC

Restaurant operators looking to boost their off-premises business can grow their offerings beyond traditional food and beverage items. These are the off-premises offerings that garnered solid interest among consumers:

Meal kits: Operators can offer a meal kit that contains a package of pre-measured, raw ingredients for a complete meal, along with instructions on how to cook it at home.

Meal subscription programs: Fully-prepared meals that are available for pickup or delivery on the customer's chosen days, and offered at a discount from the regular menu price.

Alcohol to go: The option to include wine, beer or cocktails with takeout or delivery orders, in addition to wine or beer clubs at the restaurant.

Multi-course meal bundles: Consumers express interest in multi-course meal bundles (such as an appetizer, entrée and dessert) for takeout or delivery.

Snacking options: To complement their regular off-premises offerings, restaurants can drive customer traffic by offering snacking options outside of traditional meal periods.

Packaged food: Consumers say they'd likely purchase packaged food and beverage items (such as sauces or frozen items) from the restaurant's menu if they were offered by one of their favorite restaurants.

Fresh food: Consumers say they'd likely purchase fresh, uncooked food items such as meat, produce, dairy, bread or pasta, if they were offered by one of their favorite restaurants.

Restaurant-branded apparel: Consumers say they'd likely purchase apparel (such as sweatshirts or caps) featuring the restaurant's name and logo if they were offered by one of their favorite restaurants.

Note: For more details, visit the Strategies to Drive off-premises Traffic section, page 34.

OFF-PREMISES IN 2025

YOUNGER ADULTS VIEW OFF-PREMISES AS ESSENTIAL

51% of consumers say picking up takeout or ordering from a drive-thru is an essential part of their lifestyle. 41% of consumers report similarly about ordering delivery.

Across all 3 off-premises occasions, millennials and Gen Z adults are much more likely to say these activities are essential parts of their daily lives.

6 in 10 urban consumers say picking up takeout or ordering from a drive-thru is essential to them.

2/3

2 in 3 millennials and Gen Z adults say ordering takeout is an essential part of their lifestyle.

% OF CONSUMERS WHO SAY THE FOLLOWING OFF-PREMISES ACTIVITIES ARE AN **ESSENTIAL PART OF THEIR LIFESTYLE**

OFF-PREMISES OCCASION	ALL ADULTS	GEN Z ADULTS (18-28)	MILLENNIALS (29-44)	GEN XERS (45-60)	BABY BOOMERS (61-79)	URBAN CONSUMERS	SUBURBAN CONSUMERS	RURAL CONSUMERS
ORDERING TAKEOUT FOOD OR BEVERAGES	51%	67%	64%	50%	34%	61%	48%	43%
ORDERING FOOD OR BEVERAGES FROM A DRIVE-THRU	51%	57%	62%	55%	38%	58%	48%	48%
ORDERING FOOD OR BEVERAGES FOR DELIVERY	41%	59%	61%	40%	14%	52%	39%	29%

Source: National Restaurant Association • Base: All adults



OFF-PREMISES IN 2025



YOUNGER ADULTS ARE USING OFF-PREMISES FOODSERVICE MORE OFTEN

More than 6 in 10 Gen Z adults say they use takeout, drive-thru and delivery more often now than they did a year ago. A majority of millennials reported similarly.

Just over half of urban consumers say they increased their off-premises usages over the past year.

2/3

2/3 of Gen Z adults say they use drive-thru and takeout more often than they did a year ago.

% OF CONSUMERS WHO SAY THEY **USE OFF-PREMISES MORE OFTEN** NOW THAN THEY DID A YEAR AGO

OFF-PREMISES OCCASION	ALL ADULTS	GEN Z ADULTS (18-28)	MILLENNIALS (29-44)	GEN XERS (45-60)	BABY BOOMERS (61-79)	URBAN CONSUMERS	SUBURBAN CONSUMERS	RURAL CONSUMERS
ORDERING FOOD OR BEVERAGES FROM A DRIVE-THRU	47%	68%	61%	48%	23%	56%	46%	37%
ORDERING TAKEOUT FOOD OR BEVERAGES	44%	67%	59%	35%	26%	52%	42%	36%
ORDERING FOOD OR BEVERAGES FOR DELIVERY	37%	64%	53%	32%	15%	51%	34%	27%

Source: National Restaurant Association • Base: All adults

OFF-PREMISES IN 2025

CONSUMERS WANT MORE OFF-PREMISES RESTAURANT OPTIONS

There's room for expansion in the off-premises space.

66% of consumers—including 83% of Gen Z adults and 76% of millennials—**wish they had more choice** in restaurants that offer takeout in their area.

61% of consumers would like to see more restaurants offer delivery and drive-thru in their area.

67%

of rural consumers wish they had more choice in restaurants that offer takeout.



% OF CONSUMERS WHO WISH THEY HAD **MORE CHOICES** OF RESTAURANTS THAT OFFER OFF-PREMISES IN THEIR AREA

OFF-PREMISES OPTION	ALL ADULTS	GEN Z ADULTS (18-28)	MILLENNIALS (29-44)	GEN XERS (45-60)	BABY BOOMERS (61-79)	URBAN CONSUMERS	SUBURBAN CONSUMERS	RURAL CONSUMERS
RESTAURANTS THAT OFFER TAKEOUT	66%	83%	76%	65%	49%	72%	62%	67%
RESTAURANTS THAT OFFER DRIVE-THRU	61%	69%	68%	65%	47%	63%	60%	60%
RESTAURANTS THAT OFFER DELIVERY	61%	79%	72%	67%	37%	71%	54%	60%

Source: National Restaurant Association • Base: All adults

OFF-PREMISES IN 2025

88%

of urban consumers say
they'd order delivery
more often if they had
the money to pay for it.

PENT-UP DEMAND FOR OFF-PREMISES IS STRONG

82% of customers say they'd order delivery more often if they had the money to pay for it. That includes a solid majority of consumers across all age groups, including 89% of millennials.

71% of customers say they'd use takeout or drive-thru more often if they had the financial wherewithal, with Gen Z adults and millennials the most likely to agree.



% OF CUSTOMERS WHO SAY THEY'D ORDER OFF-PREMISES MORE OFTEN IF THEY HAD THE MONEY AVAILABLE TO PAY FOR IT

OFF-PREMISES OCCASION	ALL ADULTS	GEN Z ADULTS (18-28)	MILLENNIALS (29-44)	GEN XERS (45-60)	BABY BOOMERS (61-79)	URBAN CONSUMERS	SUBURBAN CONSUMERS	RURAL CONSUMERS
ORDERING FOOD OR BEVERAGES FOR DELIVERY	82%	79%	89%	84%	72%	88%	78%	77%
ORDERING FOOD OR BEVERAGES FROM A DRIVE-THRU	71%	80%	80%	75%	52%	77%	67%	73%
ORDERING FOOD OR BEVERAGES FOR TAKEOUT	71%	82%	81%	74%	50%	74%	69%	70%

Source: National Restaurant Association • Base: Consumers who used delivery, takeout or drive-thru in the past 6 months

THE 5 OFF-PREMISES MUST-HAVES IN 2025

Delivery, takeout & drive-thru fill distinct needs and offer different attributes, but customers have similar expectations for all 3. These **5 must-have attributes** drive the decisions for a majority of off-premises customers, which means restaurant operators need to make good on them.

1

SPEEDY SERVICE

Convenient, fast service is nonnegotiable for customers. Whether picking up an order, visiting a drive-thru or waiting for a delivery at home, the vast majority of customers say having the food and beverages arrive quickly is important to them. This cuts across all demographics of off-premises customers.

% OF OFF-PREMISES CUSTOMERS WHO SAY HAVING THE FOOD & BEVERAGES ARRIVE QUICKLY IS IMPORTANT TO THEM WHEN CHOOSING A RESTAURANT

CUSTOMER GROUP	ALL ADULTS	GEN Z ADULTS (18-28)	MILLENNIALS (29-44)	GEN XERS (45-60)	BABY BOOMERS (61-79)	URBAN CONSUMERS	SUBURBAN CONSUMERS	RURAL CONSUMERS
DELIVERY CUSTOMERS	94%	88%	90%	99%	99%	95%	92%	95%
TAKEOUT CUSTOMERS	94%	87%	95%	95%	96%	92%	94%	94%
DRIVE-THRU CUSTOMERS	92%	82%	93%	94%	97%	91%	92%	95%

Source: National Restaurant Association • Base: Consumers who used delivery, takeout or drive-thru in the past 6 months

2

GOOD CUSTOMER SERVICE

In addition to speed, more than 9 in 10 off-premises users say good customer service is important to them when choosing a restaurant. Gen Z adults are much less likely than their older counterparts to emphasize a restaurant's quality of service.

% OF OFF-PREMISES CUSTOMERS WHO SAY **GOOD CUSTOMER SERVICE** IS IMPORTANT TO THEM WHEN CHOOSING A RESTAURANT

CUSTOMER GROUP	ALL ADULTS	GEN Z ADULTS (18-28)	MILLENNIALS (29-44)	GEN XERS (45-60)	BABY BOOMERS (61-79)	URBAN CONSUMERS	SUBURBAN CONSUMERS	RURAL CONSUMERS
TAKEOUT CUSTOMERS	93%	82%	94%	94%	97%	93%	93%	92%
DELIVERY CUSTOMERS	92%	85%	93%	95%	95%	90%	94%	94%
DRIVE-THRU CUSTOMERS	92%	83%	94%	94%	96%	92%	93%	91%

Source: National Restaurant Association • Base: Consumers who used delivery, takeout or drive-thru in the past 6 months

3

TECHNOLOGY TO EASE ORDERING/PAYMENT

Consumers embrace technologies that make off-premises ordering and paying easier, particularly among the younger generations. 75% of delivery customers say the availability of technology options for things like ordering and paying is important to them when choosing a restaurant for delivery. 64% of takeout and drive-thru customers report similarly.

% OF OFF-PREMISES CUSTOMERS WHO SAY THE AVAILABILITY OF **TECHNOLOGY OPTIONS** FOR THINGS LIKE ORDERING AND PAYING IS IMPORTANT TO THEM WHEN CHOOSING A RESTAURANT

CUSTOMER GROUP	ALL ADULTS	GEN Z ADULTS (18-28)	MILLENNIALS (29-44)	GEN XERS (45-60)	BABY BOOMERS (61-79)	URBAN CONSUMERS	SUBURBAN CONSUMERS	RURAL CONSUMERS
DELIVERY CUSTOMERS	75%	82%	79%	74%	65%	83%	71%	67%
DRIVE-THRU CUSTOMERS	64%	71%	77%	63%	44%	71%	63%	56%
TAKEOUT CUSTOMERS	64%	72%	78%	68%	42%	71%	63%	55%

Source: National Restaurant Association • Base: Consumers who used delivery, takeout or drive-thru in the past 6 months

4

VALUE OFFERS

Value will remain top of mind for consumers in 2025, particularly for off-premises users. 82% of delivery customers say the option to get a daily special, discount or value promotion is important to them when choosing a restaurant for delivery. 80% of drive-thru customers and 77% of takeout customers report similarly.

% OF OFF-PREMISES CUSTOMERS WHO SAY THE OPTION TO GET A **DAILY SPECIAL, DISCOUNT OR VALUE PROMOTION** IS IMPORTANT TO THEM WHEN CHOOSING A RESTAURANT

CUSTOMER GROUP	ALL ADULTS	GEN Z ADULTS (18-28)	MILLENNIALS (29-44)	GEN XERS (45-60)	BABY BOOMERS (61-79)	URBAN CONSUMERS	SUBURBAN CONSUMERS	RURAL CONSUMERS
DELIVERY CUSTOMERS	82%	80%	82%	85%	78%	84%	79%	84%
DRIVE-THRU CUSTOMERS	80%	74%	87%	85%	74%	83%	81%	75%
TAKEOUT CUSTOMERS	77%	74%	82%	81%	74%	80%	77%	73%

Source: National Restaurant Association • Base: Consumers who used delivery, takeout or drive-thru in the past 6 months

5

LOYALTY PROGRAMS

Now a key component of the value proposition, loyalty programs are a must-have for many consumers. 65% of drive-thru customers say an important factor when choosing a restaurant is whether they're a member of its customer loyalty and reward program. 61% of delivery and takeout customers report similarly.

% OF OFF-PREMISES CUSTOMERS WHO SAY BEING A MEMBER OF A RESTAURANT'S **LOYALTY & REWARD PROGRAM** IS IMPORTANT WHEN CHOOSING A RESTAURANT

CUSTOMER GROUP	ALL ADULTS	GEN Z ADULTS (18-28)	MILLENNIALS (29-44)	GEN XERS (45-60)	BABY BOOMERS (61-79)	URBAN CONSUMERS	SUBURBAN CONSUMERS	RURAL CONSUMERS
DRIVE-THRU CUSTOMERS	65%	62%	75%	66%	54%	69%	65%	56%
DELIVERY CUSTOMERS	61%	58%	64%	66%	51%	69%	55%	56%
TAKEOUT CUSTOMERS	61%	59%	71%	67%	49%	62%	63%	54%

Source: National Restaurant Association • Base: Consumers who used delivery, takeout or drive-thru in the past 6 months

OFF-PREMISES IN 2025

3

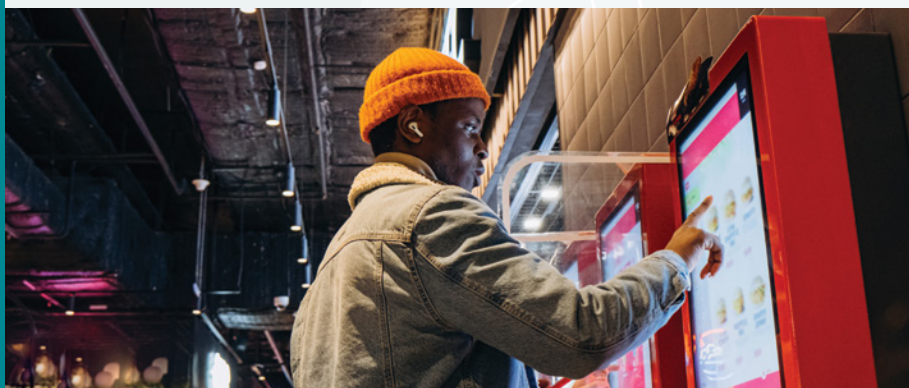
Median
number of
restaurant
apps users
have on their
phones.

HOW ARE OFF-PREMISES CUSTOMERS ORDERING?

57% of customers used a mobile app to place an off-premises order in the past 6 months. While it's not surprising that a solid majority of millennials (74%) and Gen Z adults (65%) are ordering with apps, even 36% of baby boomers tapped out an order via phone app.

However, human interaction still plays an important role; **57% of off-premises customers placed an order in-person** at a restaurant in the past 6 months. That includes 68% of baby boomers and 57% of Gen Xers, but only 46% of Gen Z adults.

Fewer than 4 in 10 off-premises customers say they ordered by phone or on websites in the past 6 months.



% OF OFF-PREMISES CUSTOMERS WHO USED THE FOLLOWING METHODS TO PLACE AN ORDER FOR DELIVERY, TAKEOUT OR DRIVE-THRU IN THE PAST 6 MONTHS

ORDERING METHOD	ALL ADULTS	GEN Z ADULTS (18-28)	MILLENNIALS (29-44)	GEN XERS (45-60)	BABY BOOMERS (61-79)	URBAN CONSUMERS	SUBURBAN CONSUMERS	RURAL CONSUMERS
MOBILE APP	57%	65%	74%	59%	36%	64%	57%	48%
IN-PERSON AT THE RESTAURANT	57%	46%	52%	57%	68%	51%	57%	64%
PHONE	39%	45%	43%	37%	33%	40%	39%	40%
WEBSITE	34%	35%	37%	34%	29%	35%	35%	28%
SOCIAL MEDIA	7%	14%	10%	3%	1%	11%	5%	4%
TEXT / SMS	6%	12%	9%	5%	2%	8%	6%	4%

Source: National Restaurant Association • Base: Consumers who used delivery, takeout or drive-thru in the past 6 months

HOW DO OFF-PREMISES CUSTOMERS PREFER TO ORDER?

While a growing number of customers embrace tech-driven ordering, restaurants still need to offer options that appeal to a broad customer base.

Overall, 35% of off-premises customers say they'd most prefer to order using a mobile app, a sentiment that's most common among millennials (47%) and Gen Z adults (41%).

At the same time, **32% of off-premises customers prefer in-person ordering** at the restaurant. Baby boomers (46%) are much more likely than millennials (24%) and Gen Z adults (23%) to prefer face-to-face ordering.

21%

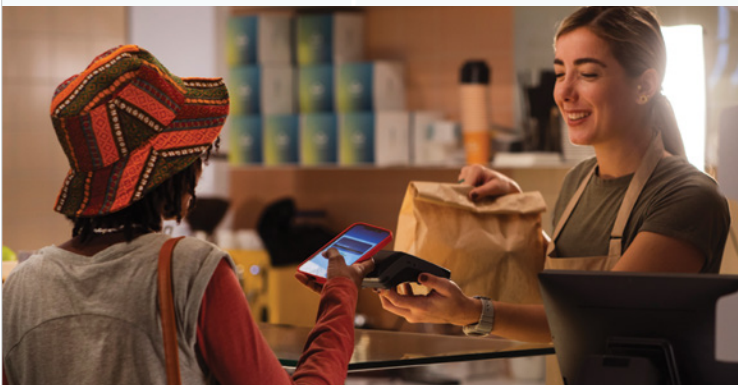
of baby boomers
prefer to order
off-premises using
a mobile app.

WAY IN WHICH OFF-PREMISES CUSTOMERS MOST PREFER TO PLACE ORDERS FOR DELIVERY, TAKEOUT OR DRIVE-THRU

PREFERRED ORDERING METHOD	ALL ADULTS	GEN Z ADULTS (18-28)	MILLENNIALS (29-44)	GEN XERS (45-60)	BABY BOOMERS (61-79)	URBAN CONSUMERS	SUBURBAN CONSUMERS	RURAL CONSUMERS
MOBILE APP	35%	41%	47%	34%	21%	40%	35%	29%
IN-PERSON AT THE RESTAURANT	32%	23%	24%	34%	46%	28%	31%	42%
PHONE CALL	17%	15%	13%	16%	20%	16%	16%	18%
WEBSITE	11%	11%	10%	13%	12%	11%	13%	9%
TEXT / SMS	2%	4%	3%	2%	1%	3%	3%	*
SOCIAL MEDIA	2%	5%	4%	1%	*	2%	2%	1%

Source: National Restaurant Association • Base: Consumers who used delivery, takeout or drive-thru in the past 6 months

Note: Columns may not sum precisely due to rounding. • *Less than 0.5%



OFF-PREMISES IN 2025

OPERATOR PERSPECTIVE: EXPANDING OFF-PREMISES TOUCHPOINTS

Many restaurant operators are considering ways to add off-premises touchpoints for consumers. Whether or not they are doing it themselves, many operators expect to see expanded off-premises offerings among their peers in 2025.

RESTAURANT OPERATORS' EXPECTATIONS OF WHETHER THE FOLLOWING OPTIONS WILL BECOME MORE COMMON **WITHIN THEIR SEGMENT** IN 2025

OFF-PREMISES OPTION	FULLSERVICE RESTAURANTS	LIMITED-SERVICE RESTAURANTS
OFFERING CURBSIDE TAKEOUT	43%	54%
OFFERING A DEDICATED TAKEOUT COUNTER OR WINDOW	31%	51%
RESTAURANT LOCATIONS THAT ONLY OFFER TAKEOUT OR DRIVE-THRU	22%	34%
ADDITION OF DRIVE-THRU LANES	12%	30%
DELIVERY FROM A VIRTUAL OR GHOST KITCHEN	19%	23%

Source: National Restaurant Association

- **Curbside takeout** is a popular option among both fullservice and limited-service operators. 54% of limited-service operators and 43% of fullservice operators expect it to become more common in their segment in 2025.
- Offering a **dedicated takeout counter or window** garnered more interest among limited-service operators (51%) than fullservice operators (31%).
- 34% of limited-service operators think **restaurant locations that only offer takeout or drive-thru** will become more common in their segment. This sentiment was less common among fullservice operators (22%).
- 30% of limited-service operators think the addition of **drive-thru lanes** will be more common in their segment in 2025; 12% of their fullservice counterparts reported similarly.
- Only 1 in 5 operators think **ghost kitchens** will become more common in their segment in 2025.



DELIVERY

FREQUENCY

Nearly 4 in 10 adults order delivery at least once a week

Younger adults are by far the most frequent delivery users. **60% of Gen Z adults and 50% of millennials say they use delivery at least once a week** compared with 35% of Gen Xers and 14% of baby boomers.

Urban consumers (49%) are more likely than their suburban (37%) and rural (22%) counterparts to use delivery at least once a week.

Delivery is an integral part of daily life for many young consumers: 13% of both Gen Z adults and millennials say they use delivery at least once a day and roughly **5% say they use it multiple times a day.**

60%

of Gen Z adults order delivery at least once a week.

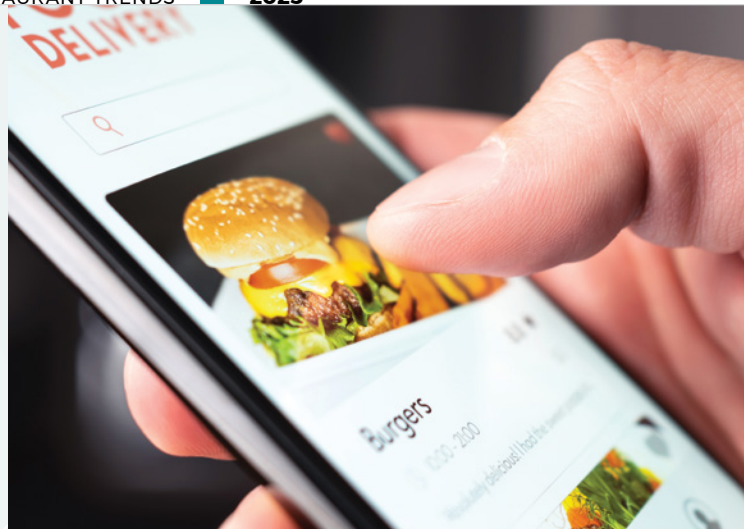
HOW OFTEN CONSUMERS ORDER FOOD OR BEVERAGES FOR DELIVERY FROM A RESTAURANT, COFFEE SHOP, SNACK PLACE OR DELI

FREQUENCY	ALL ADULTS	GEN Z ADULTS (18-28)	MILLENNIALS (29-44)	GEN XERS (45-60)	BABY BOOMERS (61-79)	URBAN CONSUMERS	SUBURBAN CONSUMERS	RURAL CONSUMERS
MULTIPLE TIMES A DAY	2%	5%	4%	2%	*	3%	2%	1%
DAILY	5%	8%	9%	3%	1%	10%	3%	2%
SEVERAL TIMES A WEEK	17%	28%	24%	17%	5%	22%	17%	9%
ONCE A WEEK	13%	21%	14%	14%	8%	14%	14%	10%
AT LEAST ONCE A WEEK	37%	60%	50%	35%	14%	49%	37%	22%
SEVERAL TIMES A MONTH	14%	15%	16%	14%	11%	15%	14%	12%
ONCE A MONTH	10%	9%	9%	11%	11%	9%	10%	11%
ONCE EVERY FEW MONTHS	10%	8%	9%	11%	10%	8%	10%	10%
ONCE OR TWICE A YEAR	8%	4%	6%	8%	11%	6%	8%	9%
NEVER	22%	5%	10%	21%	43%	13%	21%	35%

Source: National Restaurant Association • Base: All adults

Note: Columns may not sum precisely due to rounding. • *Less than 0.5%

DELIVERY



HOW CONSUMERS ORDER (AND PREFER TO ORDER) DELIVERY

Most delivery customers prefer to order directly through the restaurant

Nearly 7 in 10 delivery customers (68%) ordered delivery using a third-party service in the past 6 months. This was much more common among Gen Z adults (79%) and millennials (78%) than baby boomers (42%).

But in terms of how consumers would **prefer** to order delivery, 6 in 10 say directly through the restaurant. 8 in 10 baby boomers prefer ordering directly through the restaurant, while sentiment is mixed among millennials and Gen Z adults.

61%

of delivery customers
prefer to order directly
through the restaurant.

HOW CONSUMERS ORDER DELIVERY FROM A RESTAURANT, COFFEE SHOP, SNACK PLACE OR DELI

	ALL ADULTS	GEN Z ADULTS (18-28)	MILLENNIALS (29-44)	GEN XERS (45-60)	BABY BOOMERS (61-79)	URBAN CONSUMERS	SUBURBAN CONSUMERS	RURAL CONSUMERS
ORDERED FROM A THIRD-PARTY DELIVERY SERVICE IN THE PAST 6 MONTHS	68%	79%	78%	64%	42%	77%	71%	41%

HOW DO CUSTOMERS **PREFER** TO ORDER DELIVERY?

DIRECTLY THROUGH THE RESTAURANT	61%	53%	52%	67%	82%	53%	61%	78%
USING A THIRD-PARTY SERVICE	39%	47%	48%	33%	18%	47%	39%	22%

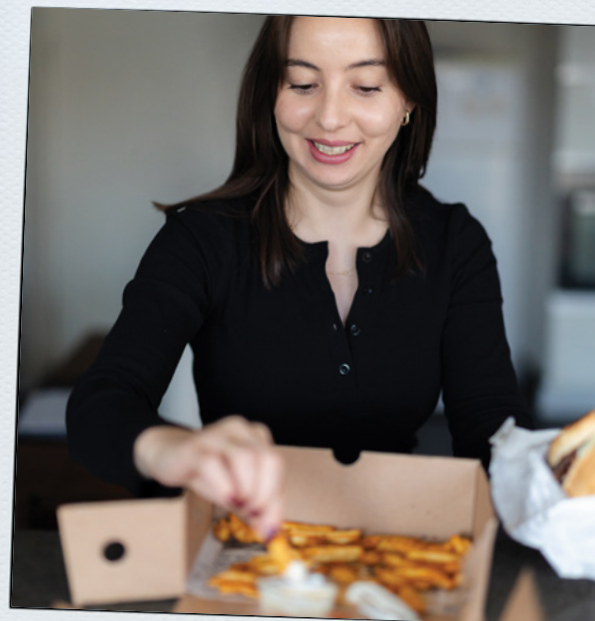
Source: National Restaurant Association • Base: Consumers who ordered food for delivery from a restaurant, coffee shop, snack place or deli in the past 6 months

CONSUMER SATISFACTION

Consumers are mostly satisfied with their delivery orders

More than 9 in 10 customers say they were satisfied with the ease of ordering and paying, customer service, the overall food quality, and the food packaging.

They were a bit **less satisfied** with the cost of the food, though 2/3 still gave cost positive marks. Baby boomers were much more likely than their younger counterparts to say they were satisfied with the cost of the food.



% OF CUSTOMERS WHO SAY THEY WERE **VERY OR SOMEWHAT SATISFIED** WITH THE FOLLOWING ATTRIBUTES OF THEIR MOST RECENT DELIVERY ORDER

ATTRIBUTE	ALL ADULTS	GEN Z ADULTS (18-28)	MILLENNIALS (29-44)	GEN XERS (45-60)	BABY BOOMERS (61-79)	URBAN CONSUMERS	SUBURBAN CONSUMERS	RURAL CONSUMERS
HOW EASY IT WAS TO ORDER AND PAY FOR THE FOOD	95%	92%	98%	95%	97%	97%	93%	97%
CUSTOMER SERVICE	92%	88%	93%	94%	93%	94%	91%	92%
OVERALL FOOD QUALITY	91%	88%	93%	90%	93%	89%	92%	91%
PACKAGING THAT CONTAINED THE FOOD	91%	86%	93%	89%	94%	91%	91%	87%
ACCURACY OF THE ORDER	89%	91%	87%	89%	94%	93%	89%	83%
AMOUNT OF TIME IT TOOK TO RECEIVE THE ORDER	87%	82%	85%	89%	92%	89%	87%	80%
TEMPERATURE OF THE FOOD	86%	78%	88%	84%	93%	88%	87%	79%
COST OF THE FOOD (INCLUDING DELIVERY FEES, TAXES AND TIPS)	67%	64%	65%	62%	82%	71%	64%	66%

Source: National Restaurant Association • Base: Consumers who ordered food for delivery from a restaurant, coffee shop, snack place or deli in the past 6 months

DELIVERY



AREAS FOR IMPROVEMENT

Maintaining food temperature and reducing wait time topped consumers' lists.

While delivery customers were generally satisfied overall, they identified areas they'd like to see restaurants improve.

Topping the list:

Maintaining the proper food temperatures, reducing the wait time for the order, and providing an accurate time when orders will be delivered.

Gen Z adults were the most likely to say they want better quality food for delivery, while baby boomers would like more delivery food options.

AREAS IN WHICH CUSTOMERS WOULD MOST LIKE RESTAURANTS THAT OFFER DELIVERY TO IMPROVE*

ATTRIBUTE	ALL ADULTS	GEN Z ADULTS (18-28)	MILLENNIALS (29-44)	GEN XERS (45-60)	BABY BOOMERS (61-79)	URBAN CONSUMERS	SUBURBAN CONSUMERS	RURAL CONSUMERS
MAINTAIN PROPER FOOD TEMPERATURES	43%	44%	44%	41%	41%	47%	39%	45%
REDUCE THE WAIT TIME TO RECEIVE THE ORDER	39%	35%	42%	41%	34%	38%	42%	35%
PROVIDE AN ACCURATE TIME WHEN ORDERS WILL BE DELIVERED	36%	39%	33%	41%	31%	34%	38%	38%
IMPROVE THE QUALITY OF THE FOOD	34%	45%	35%	30%	25%	36%	31%	39%
MAKE IT EASIER TO CUSTOMIZE ORDERS	32%	22%	26%	45%	41%	27%	37%	33%
INCREASE THE VARIETY OF FOOD OPTIONS FOR DELIVERY	31%	23%	34%	31%	41%	28%	31%	39%
IMPROVE THE ACCURACY OF ORDERS	30%	29%	34%	26%	31%	31%	31%	27%
IMPROVE THE PACKAGING THAT CONTAINS THE FOOD	24%	27%	24%	24%	19%	25%	21%	28%
MAKE IT EASIER TO ORDER AND PAY FOR THE FOOD	22%	30%	23%	14%	21%	24%	24%	10%

Source: National Restaurant Association • Base: Consumers who ordered food for delivery from a restaurant, coffee shop, snack place or deli in the past 6 months • *Note: Survey respondents were asked to rank the top 3 areas in which they'd like restaurants that offer delivery to improve. The figures in the table represent the % of respondents that ranked each item in their top 3.

VALUE OFFERINGS

Delivery customers are interested in value meals and BOGO offers

Most delivery customers would **take advantage of value offerings** if they were offered by a restaurant in their area that offers delivery.

Topping the list: Value/combo meals (87%), buy-one-get-one-free (86%), and daily specials or LTOs (83%).

79%

of delivery customers would **take advantage of discounts** for ordering during less busy times of the day.

% OF DELIVERY CUSTOMERS WHO SAY THEY'D **LIKELY USE THE FOLLOWING OPTIONS** IF THEY WERE OFFERED BY A RESTAURANT THAT DELIVERS IN THEIR AREA

OFFERING	ALL ADULTS	GEN Z ADULTS (18-28)	MILLENNIALS (29-44)	GEN XERS (45-60)	BABY BOOMERS (61-79)	URBAN CONSUMERS	SUBURBAN CONSUMERS	RURAL CONSUMERS
VALUE/COMBO MEALS AT A REDUCED PRICE	87%	84%	89%	89%	84%	86%	85%	92%
BUY-ONE-GET-ONE-FREE (BOGO)	86%	84%	88%	87%	85%	87%	84%	91%
DAILY SPECIALS OR LIMITED-TIME OFFERS AT A REDUCED PRICE	83%	77%	79%	93%	82%	83%	82%	86%
DISCOUNTS FOR ORDERING ON LESS BUSY DAYS OF THE WEEK	81%	75%	79%	85%	83%	80%	82%	78%
OPTION TO ORDER LARGER-SIZED PORTIONS AT THE REGULAR PRICE	79%	81%	83%	78%	68%	79%	79%	77%
DISCOUNTS FOR ORDERING DURING LESS BUSY TIMES OF THE DAY	79%	76%	77%	83%	79%	78%	82%	72%
DISCOUNTED ADD-ON, SUCH AS A DESSERT OR DRINK	79%	77%	83%	81%	72%	82%	77%	78%
OPTION TO ORDER SMALLER-SIZED PORTIONS FOR A LOWER PRICE	75%	71%	75%	82%	70%	75%	74%	76%
DISCOUNTS FOR PAYING IN CASH INSTEAD OF A CREDIT/DEBIT CARD	67%	62%	69%	70%	64%	68%	67%	62%

Source: National Restaurant Association • Base: Consumers who ordered food for delivery from a restaurant, coffee shop, snack place or deli in the past 6 months

DELIVERY

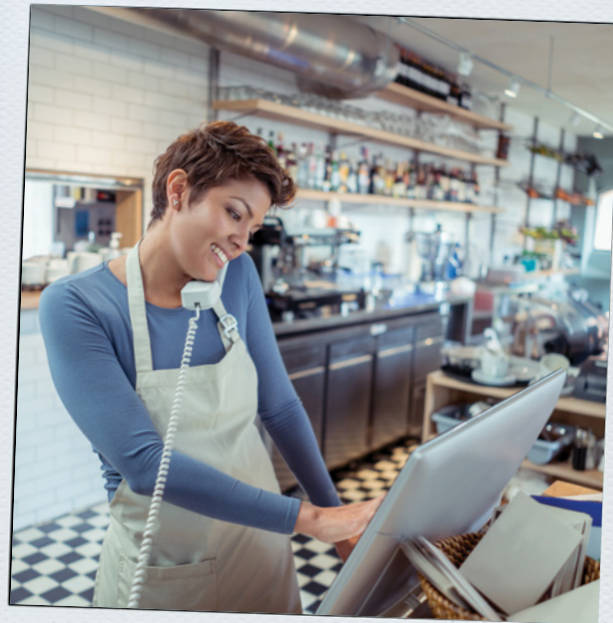
SNAPSHOT OF RESTAURANTS THAT OFFER DELIVERY

65% of limited-service operators say their restaurant offers delivery and 70% of this group say delivery represents a larger proportion of their sales now than it did in 2019.

37% of fullservice operators say their restaurant offers delivery and 57% of this group say delivery represents a larger proportion of their sales now than it did in 2019.

Customers can order using a **third-party delivery** service at 58% of limited-service restaurants and 32% of fullservice restaurants.

Most operators say their delivery is available through multiple third-party services. Among restaurants that allow customers to order delivery using third-party service, 63% of limited-service operators and 41% of fullservice operators say they're **available on 3 or more platforms**.



HOW RESTAURANTS CURRENTLY OFFER DELIVERY

	FULLSERVICE RESTAURANTS	LIMITED-SERVICE RESTAURANTS
OFFERS DELIVERY	37%	65%
CUSTOMERS CAN ORDER USING BOTH A THIRD-PARTY DELIVERY SERVICE AND DIRECTLY THROUGH THE RESTAURANT	20%	38%
CUSTOMERS CAN ONLY ORDER THROUGH A THIRD-PARTY DELIVERY SERVICE	12%	20%
CUSTOMERS CAN ONLY ORDER DIRECTLY THROUGH THE RESTAURANT AND IT GETS DELIVERED BY IN-HOUSE STAFF	2%	4%
CUSTOMERS CAN ONLY ORDER DIRECTLY THROUGH THE RESTAURANT AND IT GETS DELIVERED BY A THIRD-PARTY PROVIDER	3%	3%
DOES NOT OFFER DELIVERY	63%	35%

MOST RESTAURANTS ARE ON MULTIPLE THIRD-PARTY DELIVERY PLATFORMS

	FULLSERVICE RESTAURANTS	LIMITED-SERVICE RESTAURANTS
NUMBER OF THIRD-PARTY DELIVERY PLATFORMS RESTAURANT IS ON		
1	28%	13%
2	31%	24%
3 OR MORE	41%	63%

Source: National Restaurant Association
Base: Restaurants that offer delivery and allow customers to order using third-party delivery service.

Source: National Restaurant Association

THIRD-PARTY DELIVERY: OPERATOR ACTIONS

Most restaurants charge more for items ordered using a third-party delivery service

Higher prices for third-party delivery

- 83% of limited-service operators and 66% of fullservice operators say their restaurant charges more for menu items that are ordered using a third-party provider than it does for the same items that are ordered for dining in or takeout.

Limited-service operators more likely to offer discounts or deals

- 62% of limited-service operators say their restaurant occasionally offers discounts or deals on menu items that are ordered using a third-party provider. Only 35% of fullservice operators say they do.

Fullservice operators more likely to pause third-party delivery

- 74% of fullservice operators and 51% of limited-service operators say their restaurant will temporarily turn off delivery from third-party providers if the restaurant gets too busy with on-premises customers.



THIRD-PARTY DELIVERY: OPERATOR ACTIONS

	FULLSERVICE RESTAURANTS	LIMITED-SERVICE RESTAURANTS
RESTAURANT CHARGES MORE FOR MENU ITEMS THAT ARE ORDERED USING A THIRD-PARTY PROVIDER THAN IT DOES FOR THE SAME ITEMS THAT ARE ORDERED FOR DINING IN OR TAKEOUT	66%	83%
RESTAURANT OCCASIONALLY OFFERS DISCOUNTS OR DEALS ON MENU ITEMS THAT ARE ORDERED USING A THIRD-PARTY PROVIDER	35%	62%
RESTAURANT WILL TEMPORARILY TURN OFF DELIVERY FROM THIRD-PARTY PROVIDERS IF THE RESTAURANT GETS TOO BUSY WITH ON-PREMISES CUSTOMERS	74%	51%

Source: National Restaurant Association • Base: Restaurants that offer delivery and allow customers to order using third-party delivery service.

DELIVERY

90%

of operators say
third-party delivery fees
have a negative impact
on their business.

THIRD-PARTY DELIVERY: OPERATOR CHALLENGES

Restaurant operators report pain points associated with third-party delivery

Third-party delivery opened up a new business channel for many restaurants, but operators report challenges associated with it.

Topping the list are fees they pay to third-party delivery providers and getting charged by a third-party provider when a customer complains, and receives a refund on their order.



RESTAURANT OPERATORS WHO SAY THE FOLLOWING ITEMS HAVE AN **'EXTREMELY NEGATIVE'** OR **'SOMEWHAT NEGATIVE'** IMPACT ON THEIR BUSINESS

	FULL-SERVICE RESTAURANTS	LIMITED-SERVICE RESTAURANTS
FEES PAID TO THIRD-PARTY DELIVERY PROVIDERS	91%	89%
GETTING CHARGED BY A THIRD-PARTY PROVIDER WHEN A CUSTOMER COMPLAINS, AND RECEIVES A REFUND ON THEIR ORDER	82%	90%
DELIVERY DRIVERS ARRIVING TOO EARLY OR TOO LATE TO PICK UP FOOD, LEADING TO CROWDING ISSUES IN THE RESTAURANT OR FOOD QUALITY ISSUES	77%	79%
INABILITY TO RESPOND TO CUSTOMER FEEDBACK OR CUSTOMER COMPLAINTS	75%	80%
LACK OF CUSTOMER DATA FROM THIRD-PARTY COMPANIES	73%	71%
RESTAURANT INFORMATION BEING POSTED BY THIRD-PARTY DELIVERY PROVIDERS WITHOUT CONSENT	61%	50%

Source: National Restaurant Association • Base: Restaurants that offer delivery and allow customers to order using third-party delivery service.

TAKEOUT

FREQUENCY

Nearly half of adults order takeout at least once a week

47% of adults say they pick up food and beverage for takeout from a restaurant, coffee shop, snack place or deli at least **once a week**. Nearly 6 in 10 millennials (59%) and Gen Z adults (57%) order takeout on a weekly basis, compared with 44% of Gen Xers and 33% of baby boomers.

Urban (53%) and suburban (48%) consumers are more likely than rural consumers (37%) to use takeout on a weekly basis.

Younger adults order takeout most often: 12% of Gen Z adults and 10% of millennials say they use takeout at least once a day.

59%

of millennials use takeout
at least once a week.

HOW OFTEN CONSUMERS PICK UP TAKEOUT FOOD OR BEVERAGES FROM A RESTAURANT, COFFEE SHOP, SNACK PLACE OR DELI

FREQUENCY	ALL ADULTS	GEN Z ADULTS (18-28)	MILLENNIALS (29-44)	GEN XERS (45-60)	BABY BOOMERS (61-79)	URBAN CONSUMERS	SUBURBAN CONSUMERS	RURAL CONSUMERS
MULTIPLE TIMES A DAY	2%	3%	3%	1%	*	3%	1%	1%
DAILY	5%	9%	7%	3%	2%	8%	3%	4%
SEVERAL TIMES WEEK	22%	27%	29%	21%	14%	24%	24%	16%
ONCE A WEEK	18%	17%	20%	19%	18%	19%	20%	16%
AT LEAST ONCE A WEEK	47%	57%	59%	44%	33%	53%	48%	37%
SEVERAL TIMES A MONTH	20%	20%	19%	22%	19%	18%	19%	23%
ONCE A MONTH	11%	10%	8%	12%	15%	9%	11%	13%
ONCE EVERY FEW MONTHS	10%	8%	7%	12%	14%	9%	11%	11%
ONCE OR TWICE A YEAR	5%	3%	4%	4%	7%	4%	5%	7%
NEVER	7%	4%	4%	7%	12%	7%	6%	10%

Source: National Restaurant Association • Base: All adults • Note: Columns may not sum precisely due to rounding. • *Less than 0.5%

TAKEOUT

CONSUMER SATISFACTION

Customers rate their takeout experiences highly

Takeout customers generally gave high marks to their most recent takeout experience, with the vast **majority** saying they were **satisfied with the ease of ordering/paying, food quality, convenience, and packaging.**

Like their delivery counterparts, takeout customers gave somewhat lower marks to the cost of the food. Baby boomers were the most satisfied with the cost of the food.



% OF CUSTOMERS WHO SAY THEY WERE **VERY OR SOMEWHAT SATISFIED** WITH THE FOLLOWING ATTRIBUTES OF THEIR MOST RECENT TAKEOUT ORDER

ATTRIBUTE	ALL ADULTS	GEN Z ADULTS (18-28)	MILLENNIALS (29-44)	GEN XERS (45-60)	BABY BOOMERS (61-79)	URBAN CONSUMERS	SUBURBAN CONSUMERS	RURAL CONSUMERS
HOW EASY IT WAS TO ORDER AND PAY FOR THE FOOD	95%	90%	96%	95%	99%	93%	96%	97%
OVERALL FOOD QUALITY	95%	88%	95%	95%	99%	93%	96%	94%
CONVENIENCE GETTING IN AND OUT OF THE RESTAURANT	94%	91%	94%	93%	96%	93%	95%	94%
PACKAGING THAT CONTAINED THE FOOD	94%	89%	93%	95%	97%	94%	93%	95%
TEMPERATURE OF THE FOOD	92%	86%	92%	92%	97%	91%	94%	91%
ACCURACY OF THE ORDER	92%	86%	92%	91%	97%	93%	92%	91%
CUSTOMER SERVICE	92%	91%	93%	91%	93%	94%	93%	88%
AMOUNT OF TIME IT TOOK TO RECEIVE THE ORDER	91%	88%	92%	89%	95%	90%	93%	90%
COST OF THE FOOD (INCLUDING TAXES AND TIPS)	73%	67%	72%	67%	85%	72%	75%	72%

Source: National Restaurant Association • Base: Consumers who picked up takeout food or beverages from a restaurant, coffee shop, snack place or deli in the past 6 months

TAKEOUT



AREAS FOR IMPROVEMENT

Takeout customers would like to see better food quality and a shorter wait time

Customers would most like to see restaurants improve how they maintain the proper **temperature of the food**, followed closely by **reducing the wait time** to receive the order and improving the quality of the food.

Gen Z adults were the most likely to say they want restaurants to improve the quality of the food for takeout, while baby boomers were the most likely to say they'd like to see a greater variety of food options for takeout.

AREAS IN WHICH CUSTOMERS WOULD MOST LIKE RESTAURANTS THAT OFFER TAKEOUT TO IMPROVE*

ATTRIBUTE	ALL ADULTS	GEN Z ADULTS (18-28)	MILLENNIALS (29-44)	GEN XERS (45-60)	BABY BOOMERS (61-79)	URBAN CONSUMERS	SUBURBAN CONSUMERS	RURAL CONSUMERS
MAINTAIN THE PROPER TEMPERATURE OF THE FOOD	40%	40%	38%	36%	46%	41%	39%	41%
REDUCE THE WAIT TIME TO RECEIVE THE ORDER	39%	42%	40%	39%	36%	42%	41%	34%
IMPROVE THE QUALITY OF THE FOOD	38%	47%	42%	31%	34%	37%	35%	42%
INCREASE THE VARIETY OF FOOD OPTIONS FOR TAKEOUT	35%	22%	35%	35%	40%	31%	35%	38%
MAKE IT EASIER TO CUSTOMIZE ORDERS	33%	33%	28%	37%	35%	36%	32%	32%
IMPROVE THE ACCURACY OF ORDERS	33%	27%	37%	39%	28%	28%	33%	39%
MAKE IT MORE CONVENIENT TO GET IN AND OUT OF THE RESTAURANT	31%	31%	27%	31%	35%	25%	35%	29%
MAKE IT EASIER TO ORDER AND PAY FOR THE FOOD	25%	30%	29%	26%	16%	33%	23%	19%
IMPROVE THE PACKAGING THAT CONTAINS THE FOOD	19%	21%	15%	17%	24%	17%	22%	16%

Source: National Restaurant Association • Base: Consumers who picked up takeout food or beverages from a restaurant, coffee shop, snack place or deli in the past 6 months • *Note: Survey respondents were asked to rank the top 3 areas in which they'd like restaurants that offer takeout to improve. The figures in the table represent the % of respondents that ranked each item in their top 3.

TAKEOUT

VALUE OFFERINGS

Takeout customers are highly motivated by value deals

9 in 10 say they'd likely take advantage of **BOGO offers** (89%), value/combo meals (89%) and daily specials or LTOs (88%).

Discounts for ordering during **off-peak days or hours** are popular with 8 in 10 takeout customers.

78%

of takeout customers would like discounts for ordering during less busy times of the day.

% OF TAKEOUT CUSTOMERS WHO SAY THEY'D **LIKELY USE THE FOLLOWING OPTIONS** IF THEY WERE OFFERED BY A RESTAURANT THAT OFFERS TAKEOUT IN THEIR AREA

OFFERING	ALL ADULTS	GEN Z ADULTS (18-28)	MILLENNIALS (29-44)	GEN XERS (45-60)	BABY BOOMERS (61-79)	URBAN CONSUMERS	SUBURBAN CONSUMERS	RURAL CONSUMERS
BUY-ONE-GET-ONE-FREE (BOGO) OFFERS	89%	88%	90%	90%	87%	90%	89%	86%
VALUE/COMBO MEALS AT A REDUCED PRICE	89%	84%	88%	93%	89%	87%	89%	89%
DAILY SPECIALS OR LIMITED-TIME OFFERS AT A REDUCED PRICE	88%	82%	88%	90%	91%	88%	90%	83%
DISCOUNTS FOR ORDERING ON LESS BUSY DAYS OF THE WEEK	81%	82%	87%	82%	76%	83%	81%	76%
DISCOUNTS FOR ORDERING DURING LESS BUSY TIMES OF THE DAY	78%	77%	84%	82%	73%	80%	77%	77%
OPTION TO ORDER LARGER-SIZED PORTIONS AT THE REGULAR PRICE	78%	78%	85%	83%	68%	84%	77%	73%
DISCOUNTED ADD-ON, SUCH AS A DESSERT OR DRINK	78%	81%	81%	82%	67%	84%	76%	72%
OPTION TO ORDER SMALLER-SIZED PORTIONS FOR A LOWER PRICE	73%	75%	77%	74%	72%	76%	73%	69%
DISCOUNTS FOR PAYING IN CASH INSTEAD OF A CREDIT/DEBIT CARD	70%	72%	69%	72%	70%	77%	68%	63%

Source: National Restaurant Association • Base: Consumers who picked up takeout food or beverages from a restaurant, coffee shop, snack place or deli in the past 6 months

HOW IMPORTANT IS THE INTERIOR?

Takeout customers want to pick up from attractive, inviting restaurants even though they're not dining in

If customers are just stopping into a restaurant to pick up takeout food or beverages, **does the décor** and freshness of the restaurant's interior **matter**? Most takeout customers say it does.

77% of takeout customers say an important factor when choosing a restaurant is whether the interior of the restaurant is attractive and inviting.

Gen Xers (80%) and millennials (79%) are more likely than Gen Z adults (70%) to hold this view.

% OF TAKEOUT CUSTOMERS WHO SAY AN ATTRACTIVE AND INVITING INTERIOR IS IMPORTANT WHEN CHOOSING A RESTAURANT

CUSTOMER GROUP	ALL ADULTS	GEN Z ADULTS (18-28)	MILLENNIALS (29-44)	GEN XERS (45-60)	BABY BOOMERS (61-79)	URBAN CONSUMERS	SUBURBAN CONSUMERS	RURAL CONSUMERS
TAKEOUT CUSTOMERS	77%	70%	79%	80%	76%	81%	76%	72%

Source: National Restaurant Association • Base: Consumers who picked up takeout food or beverages from a restaurant, coffee shop, snack place or deli in the past 6 months



DRIVE-THRU

55%

of millennials say
they use a drive-thru
at least once a week.

FREQUENCY

More than 4 in 10 adults use drive-thru at least once a week

42% of adults say they order food or beverages from a drive-thru at least once a week, led by millennials (55%) and Gen Z adults (54%).

Urban consumers (47%) and suburban consumers (44%) are more likely than rural consumers (32%) to be weekly users of drive-thrus.

Younger adults are the most frequent drive-thru users, with 13% of millennials and 12% of Gen Z adults saying they use it at least once a day.

HOW OFTEN CONSUMERS ORDER FROM A DRIVE-THRU AT A RESTAURANT, COFFEE SHOP, SNACK PLACE OR DELI

FREQUENCY	ALL ADULTS	GEN Z ADULTS (18-28)	MILLENNIALS (29-44)	GEN XERS (45-60)	BABY BOOMERS (61-79)	URBAN CONSUMERS	SUBURBAN CONSUMERS	RURAL CONSUMERS
MULTIPLE TIMES A DAY	2%	4%	4%	1%	*	3%	2%	1%
DAILY	5%	8%	9%	4%	2%	8%	5%	2%
SEVERAL TIMES A WEEK	18%	25%	22%	20%	8%	19%	19%	15%
ONCE A WEEK	17%	17%	19%	16%	16%	15%	19%	13%
AT LEAST ONCE A WEEK	42%	54%	55%	41%	26%	47%	44%	32%
SEVERAL TIMES A MONTH	19%	21%	19%	19%	18%	18%	18%	21%
ONCE A MONTH	11%	11%	8%	13%	13%	9%	11%	16%
ONCE EVERY FEW MONTHS	11%	7%	9%	11%	16%	8%	13%	12%
ONCE OR TWICE A YEAR	7%	3%	4%	6%	12%	6%	7%	9%
NEVER	9%	4%	5%	10%	15%	13%	7%	9%

Source: National Restaurant Association • Base: All adults • Note: Columns may not sum precisely due to rounding. • *Less than 0.5%

CONSUMER SATISFACTION

Consumers are happy with their drive-thru experiences

At least 9 in 10 drive-thru customers said they were very or somewhat satisfied with 8 of the 9 drive-thru experience attributes. The exception was the **cost of the food**, which was still **viewed positively by 77% of customers**.

In general, Gen Z adults were somewhat less satisfied than their older counterparts.



% OF CUSTOMERS WHO SAY THEY WERE **VERY OR SOMEWHAT SATISFIED** WITH THE FOLLOWING ATTRIBUTES OF THEIR MOST RECENT DRIVE-THRU ORDER

ATTRIBUTE	ALL ADULTS	GEN Z ADULTS (18-28)	MILLENNIALS (29-44)	GEN XERS (45-60)	BABY BOOMERS (61-79)	URBAN CONSUMERS	SUBURBAN CONSUMERS	RURAL CONSUMERS
HOW EASY IT WAS TO ORDER AND PAY FOR THE FOOD	94%	85%	93%	97%	98%	94%	93%	95%
OVERALL FOOD QUALITY	92%	86%	93%	93%	95%	93%	92%	91%
TEMPERATURE OF THE FOOD	90%	83%	90%	95%	91%	93%	89%	92%
PACKAGING THAT CONTAINED THE FOOD	90%	81%	90%	94%	94%	92%	89%	93%
HOW CONVENIENT IT WAS TO GET IN AND OUT OF THE RESTAURANT AREA	90%	77%	90%	96%	96%	89%	89%	94%
CUSTOMER SERVICE	90%	81%	89%	93%	95%	88%	90%	92%
AMOUNT OF TIME IT TOOK TO RECEIVE YOUR ORDER	90%	83%	88%	94%	92%	90%	89%	90%
ACCURACY OF YOUR ORDER	90%	78%	90%	94%	94%	90%	90%	88%
COST OF THE FOOD (INCLUDING TAXES AND TIPS)	77%	68%	74%	84%	79%	79%	76%	73%

Source: National Restaurant Association • Base: Consumers who ordered food or beverages from a drive-thru at a restaurant, coffee shop, snack place or deli in the past 6 months

DRIVE-THRU

AREAS FOR IMPROVEMENT

Drive-thru customers want better quality food and shorter wait times

Asked to identify areas they'd like to see drive-thru restaurants improve, consumers said enhance the quality of the food and reduce the wait time to get it.

Respondents also would like restaurants to better **maintain proper food temps** and make it more convenient to get in and out of the restaurant area.



AREAS IN WHICH CUSTOMERS WOULD MOST LIKE RESTAURANTS THAT OFFER DRIVE-THRU TO IMPROVE*

ATTRIBUTE	ALL ADULTS	GEN Z ADULTS (18-28)	MILLENNIALS (29-44)	GEN XERS (45-60)	BABY BOOMERS (61-79)	URBAN CONSUMERS	SUBURBAN CONSUMERS	RURAL CONSUMERS
IMPROVE THE QUALITY OF THE FOOD	46%	49%	45%	47%	41%	46%	45%	46%
REDUCE THE WAIT TIME TO RECEIVE THE ORDER	44%	44%	38%	45%	51%	37%	46%	50%
MAINTAIN THE PROPER TEMPERATURE OF THE FOOD	39%	28%	37%	43%	47%	38%	39%	39%
MAKE IT MORE CONVENIENT TO GET IN AND OUT OF THE RESTAURANT AREA	35%	36%	34%	34%	36%	34%	35%	36%
IMPROVE THE ACCURACY OF ORDERS	32%	38%	37%	28%	28%	35%	33%	28%
INCREASE THE VARIETY OF FOOD OPTIONS	29%	25%	26%	32%	30%	27%	30%	27%
MAKE IT EASIER TO ORDER AND PAY FOR THE FOOD	28%	28%	36%	27%	21%	32%	24%	30%
MAKE IT EASIER TO CUSTOMIZE ORDERS	27%	24%	27%	25%	32%	24%	28%	28%
IMPROVE THE PACKAGING THAT CONTAINS THE FOOD	15%	21%	15%	13%	12%	23%	12%	11%

Source: National Restaurant Association • Base: Consumers who ordered food or beverages from a drive-thru at a restaurant, coffee shop, snack place or deli in the past 6 months • *Note: Survey respondents were asked to rank the top 3 areas in which they'd like restaurants that offer drive-thru to improve. The figures in the table represent the % of respondents that ranked each item in their top 3.

81%

VALUE OFFERINGS

Drive-thru customers are motivated by value deals

Like their takeout and delivery counterparts, drive-thru customers show **strong interest in value offerings**. These were led by BOGO deals (89%), value/combo meals (88%), and daily specials or LTOs (88%).

More than 8 in 10 drive-thru customers say they'd take advantage of discounts for ordering on less busy days of the week or less busy times of the day.

of customers say they'd take advantage of discounts for visiting a drive-thru during less busy times of the day.

% OF DRIVE-THRU CUSTOMERS WHO SAY THEY'D **LIKELY USE THE FOLLOWING OPTIONS** IF THEY WERE OFFERED BY A RESTAURANT THAT OFFERS DRIVE-THRU IN THEIR AREA

OFFERING	ALL ADULTS	GEN Z ADULTS (18-28)	MILLENNIALS (29-44)	GEN XERS (45-60)	BABY BOOMERS (61-79)	URBAN CONSUMERS	SUBURBAN CONSUMERS	RURAL CONSUMERS
BUY-ONE-GET-ONE-FREE (BOGO) OFFERS	89%	84%	91%	93%	87%	90%	89%	87%
VALUE/COMBO MEALS AT A REDUCED PRICE	88%	78%	91%	94%	89%	91%	88%	86%
DAILY SPECIALS OR LIMITED-TIME OFFERS AT A REDUCED PRICE	88%	81%	88%	92%	89%	89%	89%	82%
DISCOUNTS FOR ORDERING ON LESS BUSY DAYS OF THE WEEK	82%	84%	83%	84%	81%	80%	84%	82%
DISCOUNTS FOR ORDERING DURING LESS BUSY TIMES OF THE DAY	81%	81%	83%	84%	79%	82%	81%	81%
OPTION TO ORDER LARGER-SIZED PORTIONS AT THE REGULAR PRICE	80%	78%	86%	86%	68%	86%	78%	77%
DISCOUNTED ADD-ON, SUCH AS A DESSERT OR DRINK	80%	81%	85%	87%	65%	86%	76%	77%
OPTION TO ORDER SMALLER-SIZED PORTIONS FOR A LOWER PRICE	75%	68%	80%	77%	75%	75%	76%	74%
DISCOUNTS FOR PAYING IN CASH INSTEAD OF A CREDIT/DEBIT CARD	72%	69%	72%	78%	68%	78%	68%	70%

Source: National Restaurant Association • Base: Consumers who ordered food or beverages from a drive-thru at a restaurant, coffee shop, snack place or deli in the past 6 months

STRATEGIES TO DRIVE OFF-PREMISES TRAFFIC



OFFER **REAL-TIME** SPECIALS FOR CUSTOMERS

If full-time discounts aren't in the business plan, restaurant operators can instead limit discounts to times when the restaurant isn't busy.

This could entail offering specials, such as lower prices or a free food or drink item, that go into effect on days when the restaurant is not as busy. These would be flexible changes the manager could make each day, depending on business. The restaurant could promote these deals through a smartphone app and social media.

When presented with this idea, off-premises consumers are overwhelmingly in favor of it: nearly **9 in 10 customers** across each of the 3 off-premises categories say they'd be **likely to pay attention to and take advantage of these kinds of real-time promotions** if they were offered by a restaurant in their area.

% OF OFF-PREMISES CUSTOMERS WHO SAY THEY'D TAKE ADVANTAGE OF REAL-TIME PROMOTIONS

RESTAURANT OCCASION	ALL ADULTS	GEN Z ADULTS (18-28)	MILLENNIALS (29-44)	GEN XERS (45-60)	BABY BOOMERS (61-79)	URBAN CONSUMERS	SUBURBAN CONSUMERS	RURAL CONSUMERS
DRIVE-THRU	88%	88%	92%	88%	83%	91%	88%	83%
TAKEOUT	86%	88%	92%	87%	77%	89%	86%	81%
DELIVERY	85%	90%	91%	83%	69%	91%	84%	74%

Source: National Restaurant Association • Base: Consumers who used delivery, takeout or drive-thru in the past 6 months



STRATEGIES TO DRIVE OFF-PREMISES TRAFFIC

SNACK OPTIONS
TO DRIVE TRAFFIC DURING
OFF-PEAK HOURS

64% of consumers say they are increasingly **likely to replace traditional meals** (breakfast, lunch or dinner) **with snack items** during the day. This sentiment was shared by a majority of consumers across all age groups, including 72% of millennials and 70% of Gen Z adults.

To complement their regular off-premises offerings, restaurants can drive customer traffic by offering snacking options outside of traditional meal periods.

% OF CONSUMERS WHO SAY THEY ARE INCREASINGLY LIKELY TO **REPLACE TRADITIONAL MEALS** (BREAKFAST, LUNCH OR DINNER) WITH **SNACK ITEMS** DURING THE DAY

RESTAURANT OCCASION	ALL ADULTS	GEN Z ADULTS (18-28)	MILLENNIALS (29-44)	GEN XERS (45-60)	BABY BOOMERS (61-79)	URBAN CONSUMERS	SUBURBAN CONSUMERS	RURAL CONSUMERS
INCREASINGLY LIKELY TO REPLACE TRADITIONAL MEALS WITH SNACK ITEMS	64%	70%	72%	64%	51%	71%	59%	62%

Source: National Restaurant Association • Base: All adults

STRATEGIES TO DRIVE OFF-PREMISES TRAFFIC

EXPAND BEYOND TRADITIONAL OFF-PREMISES FOOD & BEVERAGE OPTIONS

A growing number of consumers say ordering off-premises food and beverages from restaurants is an essential part of their lifestyle and restaurants have a great opportunity to expand beyond the traditional takeout and delivery options to offer something unique.



Meal kits:

7 in 10 adults—including 84% of both Gen Z adults and millennials—say they'd likely purchase a meal kit (a package of pre-measured, raw ingredients for a complete meal, along with instructions on how to cook it at home) if it was offered by one of their favorite restaurants.

Multi-course meal bundles:

67% of consumers—including 3 in 4 Gen Z adults and millennials—say they'd likely order multi-course meal bundles (such as an appetizer, entrée and dessert) for takeout or delivery if they were offered by one of their favorite restaurants.

Meal subscription programs:

62% of adults—including 78% of both Gen Z adults and millennials—say they'd likely participate in a meal subscription program where they can sign up to receive a specified number of meals during the month. These fully prepared meals would be available for pickup or delivery on the customer's chosen days, and offered at a discount from the regular menu price.

% OF CONSUMERS WHO SAY THEY'D **LIKELY USE THE FOLLOWING OPTIONS** IF THEY WERE OFFERED BY A RESTAURANT IN THEIR AREA THAT THEY PATRONIZE

OPTION	ALL ADULTS	GEN Z ADULTS (18-28)	MILLENNIALS (29-44)	GEN XERS (45-60)	BABY BOOMERS (61-79)	URBAN CONSUMERS	SUBURBAN CONSUMERS	RURAL CONSUMERS
MEAL KITS	70%	84%	84%	73%	48%	77%	68%	63%
MULTI-COURSE MEAL BUNDLES FOR TAKEOUT OR DELIVERY	67%	78%	75%	71%	53%	75%	64%	63%
MEAL SUBSCRIPTION PROGRAMS	62%	78%	78%	63%	38%	72%	57%	58%

Source: National Restaurant Association • Base: All adults

STRATEGIES TO DRIVE OFF-PREMISES TRAFFIC

OFFER RETAIL ITEMS FOR SALE: FOOD & APPAREL

6 in 10 adults—including 74% of Gen Z adults and 69% of millennials—say they're more likely to incorporate restaurant-prepared items—such as a main dish, side, or dessert—into their home-prepared meals than they used to be. Restaurants can take advantage of this demand by offering both fresh and packaged items for sale on-site.

Packaged food:

65% of adults—including 3 in 4 Gen Z adults and millennials—say they'd likely buy packaged food and beverages (such as sauces or frozen items) from the restaurant's menu if they were offered by one of their favorite restaurants.

Fresh food:

57% of consumers—including 75% of Gen Z adults and 69% of millennials—say they'd likely purchase fresh, uncooked food items such as meat, produce, dairy, bread or pasta, if they were offered.

Restaurant-branded apparel:

Looking to spread the word about your restaurant? Look no further than your loyal customers. Outfit your biggest brand ambassadors with swag and send them on their way.

44%

of adults—including 55% of millennials and 65% of Gen Z adults—say they'd likely buy logoed apparel (such as sweatshirts or caps) if their favorite restaurants sold it.

% OF CONSUMERS WHO SAY THEY'D LIKELY PURCHASE THE FOLLOWING ITEMS IF THEY WERE OFFERED BY ONE OF THEIR FAVORITE RESTAURANTS

OPTION	ALL ADULTS	GEN Z ADULTS (18-28)	MILLENNIALS (29-44)	GEN XERS (45-60)	BABY BOOMERS (61-79)	URBAN CONSUMERS	SUBURBAN CONSUMERS	RURAL CONSUMERS
PACKAGED FOOD AND BEVERAGE ITEMS—SUCH AS SAUCES OR FROZEN ITEMS—FROM THE RESTAURANT'S MENU	65%	77%	75%	69%	46%	74%	62%	58%
FRESH, UNCOOKED FOOD ITEMS SUCH AS MEAT, PRODUCE, DAIRY, BREAD OR PASTA	57%	75%	69%	60%	34%	66%	55%	51%
APPAREL—SUCH AS SWEATSHIRTS OR CAPS—CONTAINING THE RESTAURANT'S NAME AND LOGO	44%	65%	55%	42%	23%	54%	38%	40%

Source: National Restaurant Association • Base: All adults

STRATEGIES TO DRIVE OFF-PREMISES TRAFFIC

OFFER **ALCOHOL-TO-GO**

Among adults who identify themselves as beer, wine or cocktail drinkers, 7 in 10 say the availability of alcohol beverages such as beer, wine or cocktails makes them more likely to choose one restaurant over another similar restaurant.

Restaurants with alcohol programs are uniquely positioned to drive off-premises traffic by providing offerings that appeal to consumers who enjoy adult beverages.

**Among wine drinkers:**

- **59%** say they'd like the option to include **wine by the bottle** with a takeout or delivery order
- **57%** say they'd join a **wine club** offered by the restaurant, which includes staff recommendations
- **53%** say they'd like the option to include **wine by the glass** with a takeout or delivery order

Among cocktail drinkers:

- **62%** say they'd include **pre-made cocktails** or mixed drinks with a takeout or delivery order
- **61%** would like the option to include a **cocktail kit** with a takeout or delivery order, with the ingredients to make a batch of cocktails at home.

Among beer drinkers:

- **64%** would like the option to include **beer** with a takeout or delivery order
- **62%** would join a **beer club** offered by the restaurant, which includes staff recommendations

Source: National Restaurant Association; Base: Consumers age 21+ who drink wine, cocktails or beer either at home or at a restaurant.

STRATEGIES TO DRIVE OFF-PREMISES TRAFFIC

BEVERAGES THAT FULLSERVICE RESTAURANTS OFFER FOR INCLUSION IN TAKEOUT OR DELIVERY ORDERS

BEVERAGES	% OF RESTAURANTS
BEER	79%
WINE BY THE BOTTLE	68%
MIXED COCKTAILS	63%
WINE BY THE GLASS	36%

OFF-PREMISES CHANNELS IN WHICH RESTAURANTS OFFER THE OPTION OF INCLUDING ALCOHOL BEVERAGES

OFF-PREMISES CHANNELS	% OF RESTAURANTS
TAKEOUT	92%
DELIVERY BY A THIRD-PARTY PROVIDER	24%
DELIVERY BY THE RESTAURANT'S STAFF	8%

Source: National Restaurant Association • Base: Restaurants that serve alcohol beverages and offer alcohol beverages with takeout/delivery.

WHAT ARE OPERATORS DOING?

Among fullservice operators that serve alcohol beverages, 41% say their restaurant offers the option of including alcohol beverages with takeout or delivery orders.

Beer (79%) is the most common beverage offered, followed by bottled wine (68%) and mixed cocktails (63%). 92% of these operators offer alcohol-to-go in takeout orders, while a smaller proportion offer it via third-party delivery (24%) and in-house delivery (8%).

STRATEGIES TO DRIVE OFF-PREMISES TRAFFIC



UPGRADE PACKAGING TO EXPAND OFF-PREMISES OFFERINGS

Consumers want more off-premises options, but restaurants can be constrained by what food travels well.

90% of off-premises customers say they'd likely order a greater variety of food items for takeout or delivery if the restaurant used upgraded packaging that helps hold food close to the temperature, taste and quality as when it's served in the restaurant.

% OF OFF-PREMISES CUSTOMERS WHO SAY THEY'D LIKELY ORDER A GREATER VARIETY OF FOOD ITEMS FOR TAKEOUT OR DELIVERY, IF THE RESTAURANT USED **PACKAGING THAT HELPS THE FOOD MAINTAIN THE SAME QUALITY** AS WHEN IT'S SERVED IN THE RESTAURANT

	ALL ADULTS	GEN Z ADULTS (18-28)	MILLENNIALS (29-44)	GEN XERS (45-60)	BABY BOOMERS (61-79)	URBAN CONSUMERS	SUBURBAN CONSUMERS	RURAL CONSUMERS
WOULD LIKELY ORDER A GREATER VARIETY OF FOOD ITEMS FOR TAKEOUT OR DELIVERY	90%	94%	93%	89%	85%	91%	90%	89%

Source: National Restaurant Association • Base: Adults who ordered takeout or delivery food from a restaurant in the past 6 months



STRATEGIES TO DRIVE OFF-PREMISES TRAFFIC

UPGRADE PACKAGING TO
EXPAND OFF-PREMISES OFFERINGS
(CONTINUED)

Moreover, a majority of consumers would pay extra for it. 53% of off-premises customers*—including nearly 6 in 10 Gen Z adults and millennials—say they’d be willing to pay a little more for these takeout and delivery orders than they would in the restaurant, to cover the cost of the upgraded packaging.

53%

of off-premises customers say they’d
pay more for upgraded packaging.

% OF OFF-PREMISES CUSTOMERS WHO SAY THEY’D BE **WILLING**
TO PAY A LITTLE MORE FOR TAKEOUT AND DELIVERY ORDERS TO
COVER THE COST OF THE **UPGRADED PACKAGING**

	ALL ADULTS	GEN Z ADULTS (18-28)	MILLENNIALS (29-44)	GEN XERS (45-60)	BABY BOOMERS (61-79)	URBAN CONSUMERS	SUBURBAN CONSUMERS	RURAL CONSUMERS
WOULD BE WILLING TO PAY A LITTLE MORE FOR THESE TAKEOUT AND DELIVERY ORDERS THAN THEY WOULD IN THE RESTAURANT	53%	59%	56%	51%	48%	59%	51%	50%

Source: National Restaurant Association • Base: off-premises customers who say they’d be likely order a greater variety of food items for takeout or delivery, if the restaurant used packaging that helps the food maintain the same temperature, taste and quality as when it is served in the restaurant.

STRATEGIES TO DRIVE OFF-PREMISES TRAFFIC

UPGRADE PACKAGING TO EXPAND OFF-PREMISES OFFERINGS (CONTINUED)

Burgers and fries top the list of expanded delivery items

Consumers were presented with a list of items that are typically not ordered for *delivery* from restaurants. They were asked if they'd be likely to order each item for delivery if the packaging was improved so that the food had the same temperature, taste and quality as when it's served in the restaurant.

8 in 10 consumers say they'd likely order burgers in this scenario, while 3 in 4 would order French fries and pasta. A majority of consumers also say they would order salads, steak or ice cream. Consumers are less interested in the delivery of seafood items, such as lobster, tuna or calamari.

Gen Z adults and millennials—the most frequent users of delivery—are the most likely to expand their menu of delivery options, if the food has the same quality as it does in the restaurant.

% OF CONSUMERS WHO SAY THEY'D **LIKELY ORDER THE FOLLOWING** ITEMS FOR DELIVERY IF THE PACKAGING WAS IMPROVED

FOOD ITEM	ALL ADULTS	GEN Z ADULTS (18-28)	MILLENNIALS (29-44)	GEN XERS (45-60)	BABY BOOMERS (61-79)	URBAN CONSUMERS	SUBURBAN CONSUMERS	RURAL CONSUMERS
HAMBURGERS/CHEESEBURGERS	81%	88%	91%	83%	67%	84%	81%	77%
FRENCH FRIES	76%	87%	91%	73%	59%	80%	76%	74%
PASTA	76%	88%	84%	76%	64%	81%	76%	71%
SALADS	71%	72%	76%	76%	63%	74%	72%	65%
STEAK	66%	78%	78%	69%	45%	73%	66%	58%
ICE CREAM OR FROZEN DESSERTS	59%	77%	69%	55%	42%	72%	56%	51%
SHRIMP	51%	57%	58%	54%	38%	60%	48%	47%
FISH FILLETS SUCH AS COD, CATFISH, SEA BASS OR TILAPIA	47%	50%	50%	48%	41%	60%	41%	43%
SALMON	42%	46%	50%	39%	33%	49%	41%	34%
EGG DISHES	40%	51%	46%	39%	30%	49%	38%	36%
LOBSTER	35%	48%	41%	33%	24%	43%	34%	30%
TUNA	35%	37%	42%	33%	27%	43%	31%	32%
CALAMARI	28%	39%	36%	24%	17%	37%	28%	19%

Source: National Restaurant Association • Base: All adults

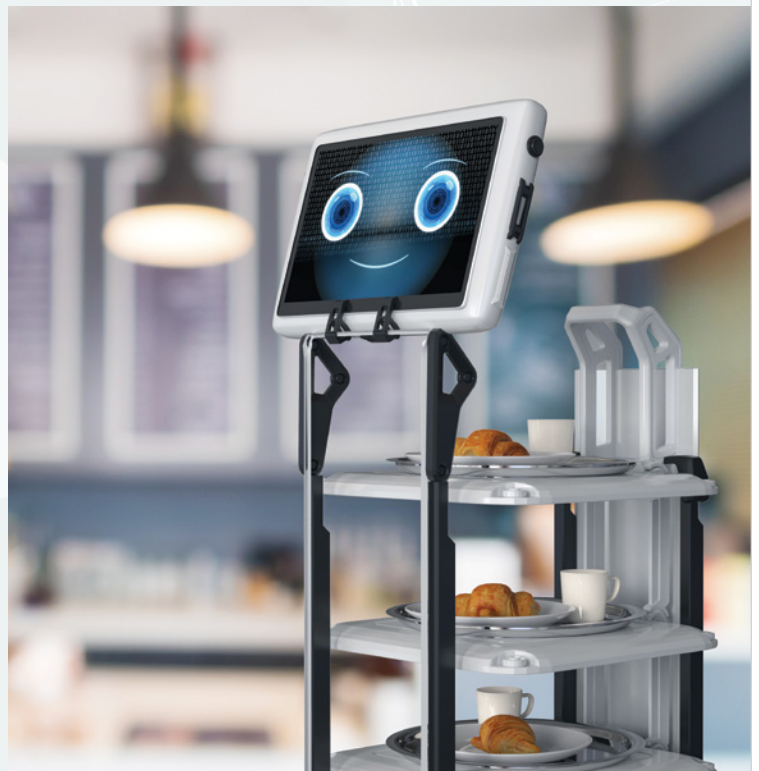
A LOOK TO THE FUTURE

YOUNGER CONSUMERS WOULD EMBRACE **MORE TECHNOLOGY** IN RESTAURANTS

Off-premises business incorporates technology more than ever before and many consumers not only welcome it but require it.

But some tech is still a bridge too far for some consumers.

Although 3 in 4 off-premises customers say they would place an order by talking to a live person on a video screen, only 46% say they'd order by talking to an Artificial Intelligence (AI) generated persona on a video screen.



A LOOK TO THE FUTURE

>1/2

More than half of millennials and Gen Z adults say they'd place an order by talking to an **Artificial Intelligence (AI)**-generated persona on a video screen.

Just over half of off-premises customers—including 6 in 10 millennials and Gen Z adults—say they'd order on a website or mobile app while interacting with an Artificial Intelligence (AI)-generated chatbot.

Having food and beverages delivered by robots or drones is acceptable to a majority of millennials and Gen Z adults, but fewer than 1 in 5 baby boomers.



% OF OFF-PREMISES CUSTOMERS WHO **WOULD USE THE FOLLOWING OPTIONS** IF THEY WERE OFFERED BY A RESTAURANT, COFFEE SHOP, SNACK PLACE OR DELI

TECHNOLOGY	ALL ADULTS	GEN Z ADULTS (18-28)	MILLENNIALS (29-44)	GEN XERS (45-60)	BABY BOOMERS (61-79)	URBAN CONSUMERS	SUBURBAN CONSUMERS	RURAL CONSUMERS
ORDER BY TALKING TO A LIVE PERSON ON A VIDEO SCREEN	74%	66%	74%	75%	77%	75%	76%	68%
ORDER FOOD OR DRINKS THAT GET PREPARED IN AN AUTOMATED ASSEMBLY LINE	53%	59%	65%	54%	35%	57%	53%	45%
ORDER ON A WEBSITE OR MOBILE APP WHILE INTERACTING WITH AN ARTIFICIAL INTELLIGENCE (AI)-GENERATED CHATBOT	52%	61%	62%	56%	32%	63%	48%	43%
ORDER BY TALKING TO AN ARTIFICIAL INTELLIGENCE (AI)-GENERATED PERSONA ON A VIDEO SCREEN	46%	50%	52%	50%	34%	52%	45%	37%
ORDER FOOD OR DRINKS THAT GET DELIVERED FROM A RESTAURANT BY A ROBOT	44%	60%	59%	42%	19%	55%	40%	36%
ORDER FOOD OR DRINKS THAT GET DELIVERED FROM A RESTAURANT BY A DRONE	41%	57%	55%	40%	18%	50%	37%	36%

Source: National Restaurant Association • Base: Consumers who used delivery, takeout or drive-thru in the past 6 months



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