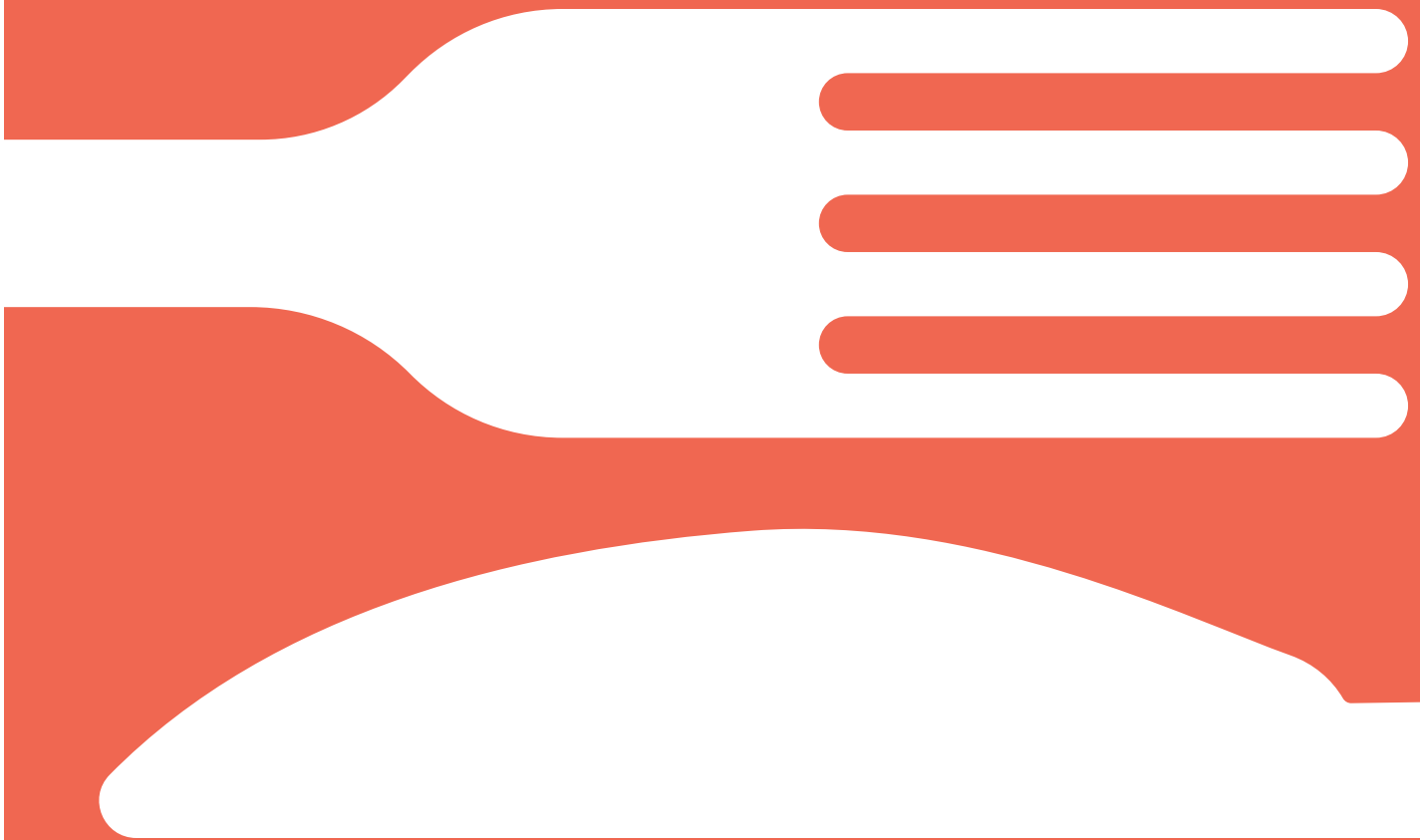


2023 Diner Trends Report

What Diners Want



Introduction

The past few years have seen major shifts in diner behaviors and preferences. From the meteoric rise of takeout and delivery apps to the outdoor dining renaissance, there's no question that diners today do not look the same as they did in 2019.

Now that restaurants have largely returned to normal operations, it's time to parse through these changes to understand what today's diners really want, including how they choose restaurants, their current dining habits, major decision-makers, and the top deal-breakers.

To find these answers, we recently surveyed more than 2,600 diners from across the U.S. and Canada. We also spoke directly with real diners to dive deeper into the stories behind these numbers and identify key trends.

With extensive data on diner frequency, values, habits, and more, our findings reveal just how much has changed in the past few years, as well as the biggest emerging trends. For restaurateurs, this data provides valuable insight into today's diners and what's required to provide the best possible guest experience.

Objective

This report provides restaurant owners, operators, and other restaurant industry professionals with an in-depth look at how diner habits and preferences have changed in the wake of the pandemic, and what diners want out of their dining experiences today. Armed with this information, restaurateurs will be able to:

1 Better navigate current challenges

2 Anticipate upcoming trends

3 Identify new solutions to provide the best possible guest experience



Methodology

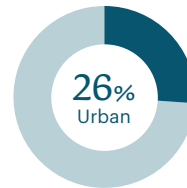
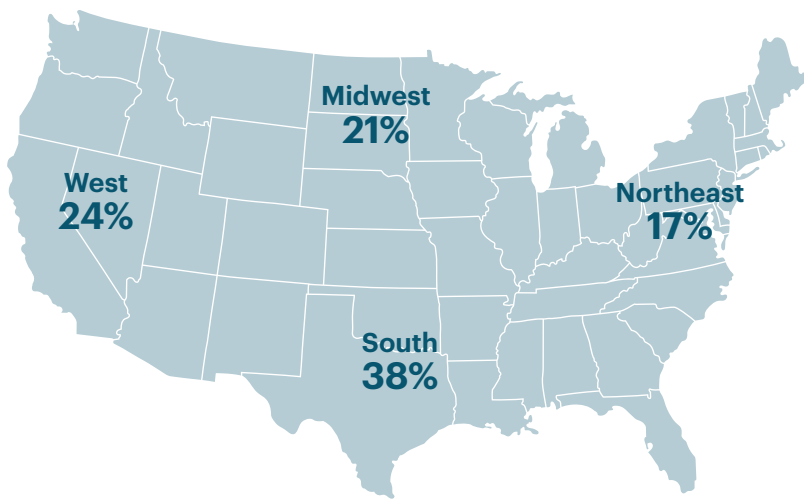
We partnered with research firm [MaruMatchbox](#) to survey 2,600 diners in the U.S. and Canada. Our research was conducted from June 20th to July 8th, 2022.

Table of Contents

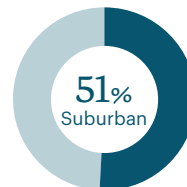
5	Respondent Profile
9	What Diners Want
24	How Diners Decide
35	What Deters Diners
41	How Diners Engage
49	Emerging Diner Trends
54	Conclusion



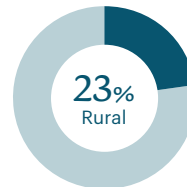
Respondent Profile



Gender
48% male
51% female
1% non-binary



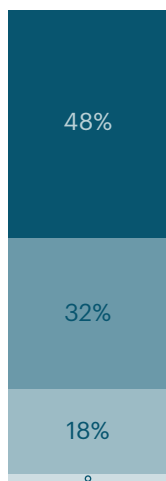
Age
 18-34: **29%**
 35-54: **33%**
 55+: **38%**



Income
 <\$50K (NET): **37%**
 \$50K - \$99K (NET): **34%**
 \$100K+ (NET): **25%**
 Undisclosed: **4%**

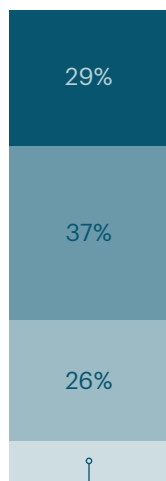
Dining

Mean Spend
\$47



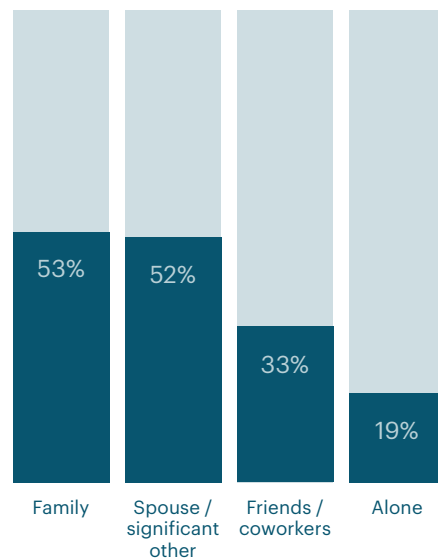
Takeout

Mean Spend
\$34

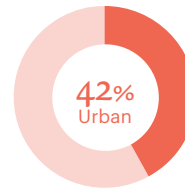
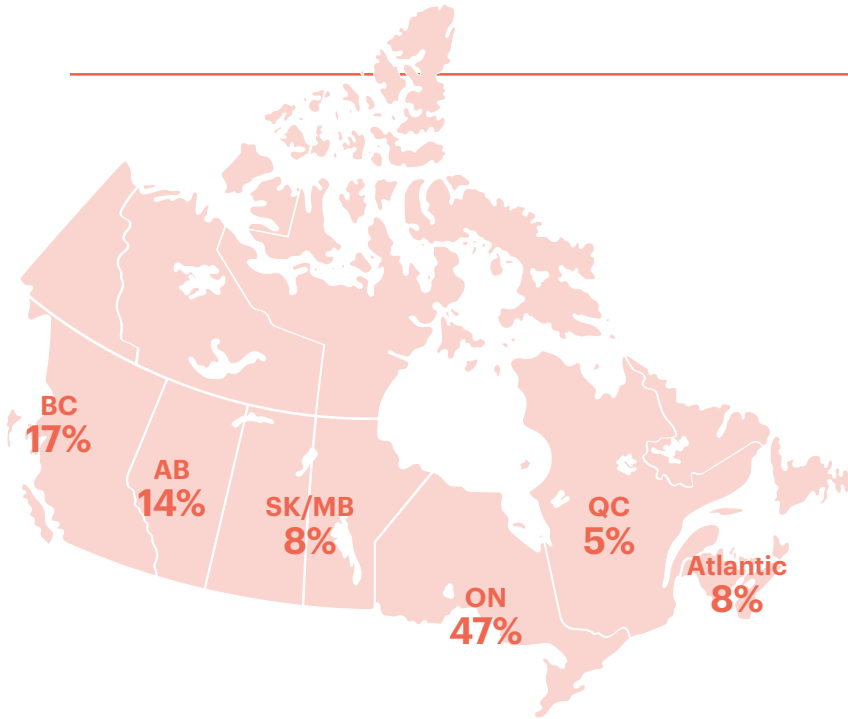


Weekly
 Once a month / a few times a month
 Rarely
 Never

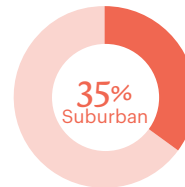
Dining With Who?



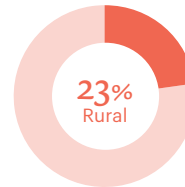
Respondent Profile



Gender
49% male
51% female



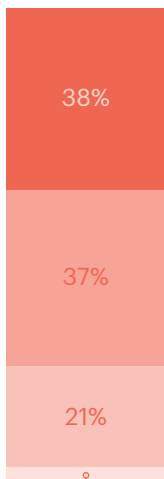
Age
 18-34: **29%**
 35-54: **35%**
 55+: **36%**



Income
 <\$50K (NET): **21%**
 \$50K - \$99K (NET): **35%**
 \$100K+ (NET): **31%**
 Undisclosed: **14%**

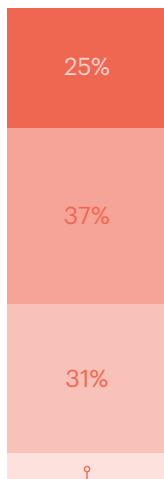
Dining

Mean Spend
\$55



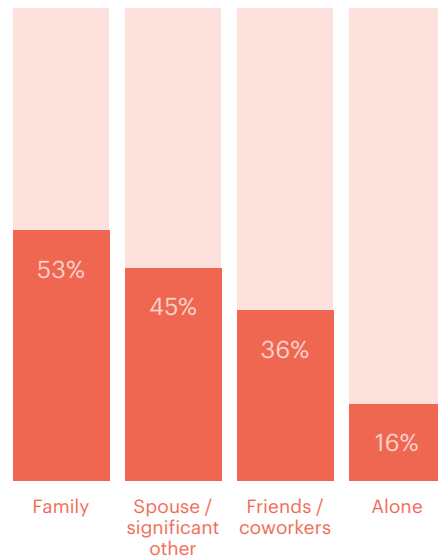
Takeout

Mean Spend
\$40



Weekly
 Once a month / a few times a month
 Rarely
 Never

Dining With Who?



Report Highlights

Our respondents gave us a unique opportunity to understand not only what gets diners through the door, but also what keeps them out. And as we uncovered, today's diners are willing to make quite a few concessions in the pursuit of their favorite foods.

Here's a preview of some of our key findings.

Dine-In Is Back In

During the pandemic, takeout and delivery sales peaked across the U.S. and Canada. However, it's now clear that this was somewhat of a temporary shift, with 44% of diners reporting that they are currently dining out at least once a week or more, and 78% saying they dine out at least once a month or more. In contrast, just 27% of diners are getting takeout/delivery at least once a week.

44%

of diners are dining out at least once a week or more

Pickup is the Preferred Takeout Option

In the face of high delivery fees, 31% of American diners and 41% of Canadian diners said that pickup was their preferred way to enjoy takeout. The drive-thru also proved a popular way to avoid these fees with more than a quarter (27%) of Americans opting for this method.

35%

prefer pickup as their takeout method of choice

Diners Somewhat Sensitive to Price Hikes

There's no question that diners are feeling a pinch when it comes to higher prices. However, only one-in-five diners said their dining decisions would be significantly impacted by menu price increases. The majority of diners (46%) said menu price increases would somewhat influence their dining decisions, while 27% said menu price increases would only have a slight impact on their decisions.

46%

of diners say menu price increases would somewhat influence their dining decisions

Report Highlights

Online Menus are Essential

Dining in may be back, but diners are still doing digital digging before venturing out. Before deciding on a new restaurant, 84% of diners reported checking a restaurant's menu online and 79% said they look at the restaurant's website.

84%

of diners look up the menu online before deciding on a new restaurant

Email is the Communication Method of Choice

Diners overwhelmingly want to hear from restaurants via email, with 50% saying it was their preferred communication channel. However, restaurants should be cautious about how many emails they're sending – 40% of diners said that too frequent emails would cause them to unsubscribe from a restaurant's email list.

50%

of diners say email is their preferred way to hear from restaurants

Loyalty Programs a Hit With Younger Diners

While only 31% of total diners said they were a member of a restaurant loyalty program, these programs are a hit with younger diners. In the U.S. 40% of Gen Z diners and 41% of Millennials said they were a part of a loyalty program, suggesting that reward programs are on the rise.

41%

of Millennials diners in the U.S. are part of a restaurant loyalty program

What Diners Want

Across the U.S. and Canada, one thing is for sure: dining out is back. While the pandemic may have caused a boom in takeout and delivery, it's clear that diners still prefer the experience of dining in – especially at local restaurants.



Dine-In Is Back

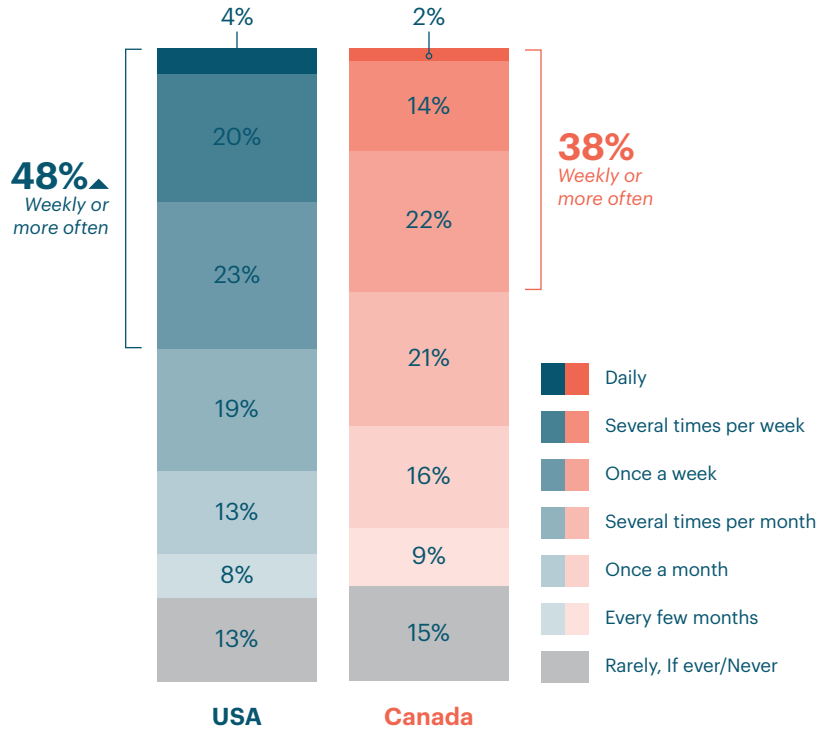
Ordering takeout and delivery has never been easier or more convenient. But it's clear that for the majority of diners, a seamless takeout experience hasn't fully replaced the desire to dine in. 48% of Americans and 38% of Canadians say they are currently dining out weekly or more often. In contrast, 29% of Americans and 25% of Canadians say they order takeout and delivery with the same frequency. While the number of diners ordering takeout and delivery is still quite high, it's clear that dining in is has not waned in popularity – especially among younger diners.

“I have a new appreciation for going out to dinner now that I didn't have during the pandemic. I've mainly been more aware of the service component and how hard each person is working. I'm just much more appreciative of these people who show up to do the work.”

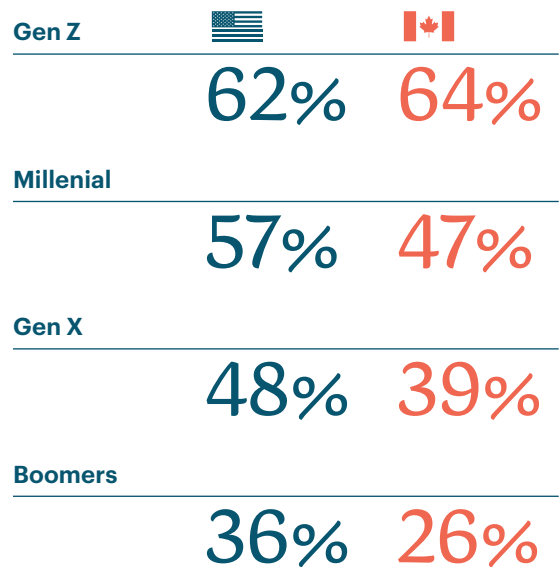
(Female, 45-54, Rhode Island, U.S.)



Frequency of Dining In



Dine-In Frequency by Generation
Dining In Weekly or More Often

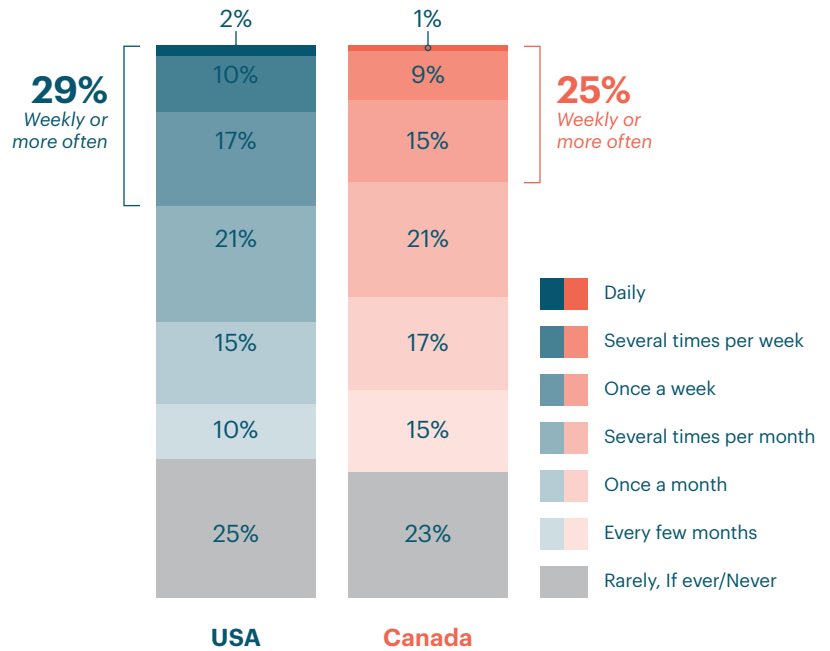


“I prefer dining in. I just feel like the whole experience is better. Usually the food is better because you're sitting down there. They're serving it to you, it's presented. Whereas when you're picking it up, it's just in a takeout container. It never looks as good so I don't have as high expectations. The food is probably still going to taste great, but it's kind of like I'm just eating it out of a plastic container on my counter.”

(Female, 25-34, British Columbia, Canada)

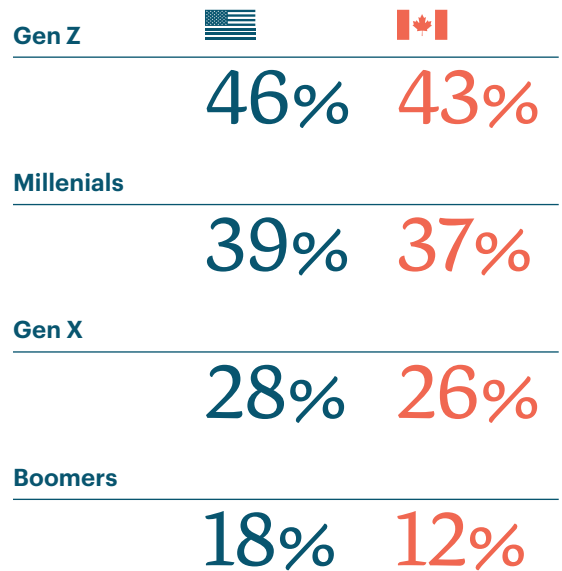


Frequency of Ordering Takeout



Takeout Frequency by Generation

Ordering Takeout Weekly or More Often



Quality Over Everything

Among those dining in, quality is the top priority, with two-thirds of diners ranking quality of food as the most important factor when dining, followed by price, customer service, and hygiene. However, Canadian diners are more price sensitive than American diners, with the majority of Canadians ranking price as second to the quality of food, while American diners placed location second. Regardless, diners in both countries agreed that dietary-specific menus, live music/DJs, and QR code menus were the least important factors influencing their dine-in decisions.

“Live music has never really sparked my interest when going out to eat. I hate when it's too loud at restaurants and I'm just trying to enjoy the meal. For me, I find the entertainment around me to be a little bit distracting. I think it can kind of take away from the meal.”

(Female, 25-34, British Columbia, Canada)



Most Important Factors When Dining In

	U.S.	Canada
Quality of food	68%	66%
Location	66%	62%
Customer service	64%	63%
Price	62%	66%
Safety/hygiene	61%	65%
Atmosphere	58%	56%
Speed of service	57%	56%
Hours of operation	56%	54%
Recommendation of family/significant others	53%	56%
Recommendation of friends/coworkers	51%	53%
Good online reviews/ratings	51%	50%
Family-friendly	49%	43%
Supporting local business	48%	55%
Menu available online	48%	50%
Have locally sourced food	41%	45%
Optional gratuity	36%	42%
Drink menu	34%	27%
Accept reservations	29%	38%
Staff wearing masks	27%	32%
6-ft spacing between tables	27%	31%
Outdoor patio dining	24%	29%
Bill splitting option	20%	23%
Dietary specific menus	19%	19%
Live music / DJ or entertainment	11%	8%
QR codes for menus	10%	7%

“The pacing of a meal is important. I don't mind waiting for my meal to ensure that it is correct when it comes out. And I don't like to be rushed when I eat it.”

(Female, 45-54, Rhode Island, USA)

Methodology

To understand what factors are important to diners when dining at a restaurant on an unconscious level, Maru/Matchbox used its proprietary Implicit Association Testing (IAT) tool. The IAT is a choice-based methodology, using the application of System 1 (implicit/subconscious) and System 2 (explicit/conscience) thinking. This involves capturing precise reaction time in milliseconds to discern if attributes are associated with a good experience are quickly or easily associated (implicit, System 1) or if the attributes were associated more slowly, requiring more think time (explicit, System 2).

For this study, the respondents were shown a series of factors and asked if they viewed them as important or not important when it comes to their restaurant dining experience. A short reaction time shows an implicit association (instinctive reaction and strong emotional connection). A longer reaction time is an explicit association (requires slower and more rational thinking). A longer reaction time is an explicit association (requires slower and more rational thinking).

Pickup is Preferred

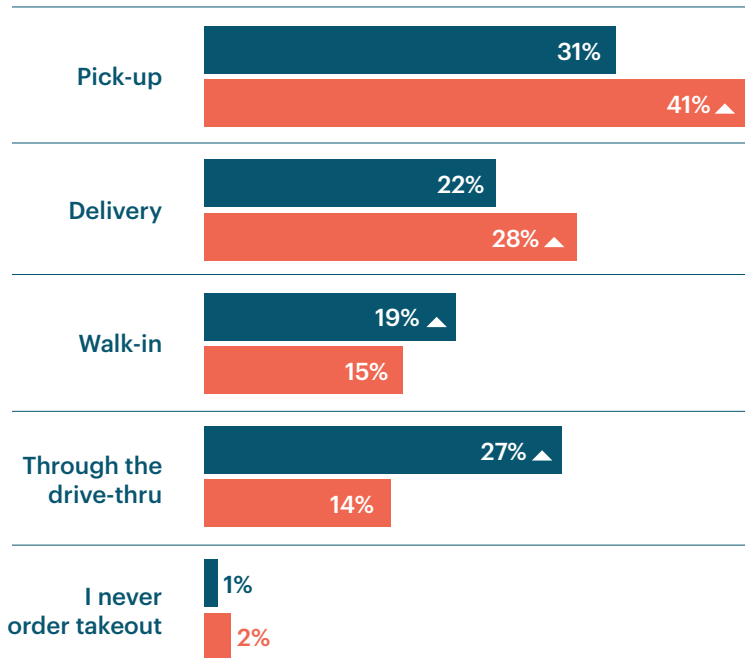
Among diners who are ordering takeout on the regular, pickup is the preferred way to enjoy food to go, with 35% of total diners opting for this method. For many diners, it's the combination of service fees, delivery fees, and taxes attached to each delivery order that makes pickup the more attractive option. In the U.S., the drive-thru is also a popular way to circumvent delivery fees, with 27% of American diners preferring the drive-thru over other takeout methods.

“That's the first thing you're going to look at is the delivery fees, not the food option that you're ordering. It's the fees. Plus taxes are a little bit more, and then there are tips on top of that. So it's a combination of everything and just a lot in the end. When you are expecting to pay a certain price, it just stacks up and then later it's not the same amount [you expected], which leads me to ask, ‘do I really want to pay that amount for food?’”

(Female, 25-34, Ontario, Canada)



Preferred Takeout Method



Young Diners Prefer to Order Online

So how do diners place their orders for takeout and delivery? 38% usually place an order over the phone, while 33% prefer to order directly through a restaurant’s website. However, these two methods are overwhelmingly preferred by older generations, while 34% of Gen Z diners prefer to order takeout via a third-party app.

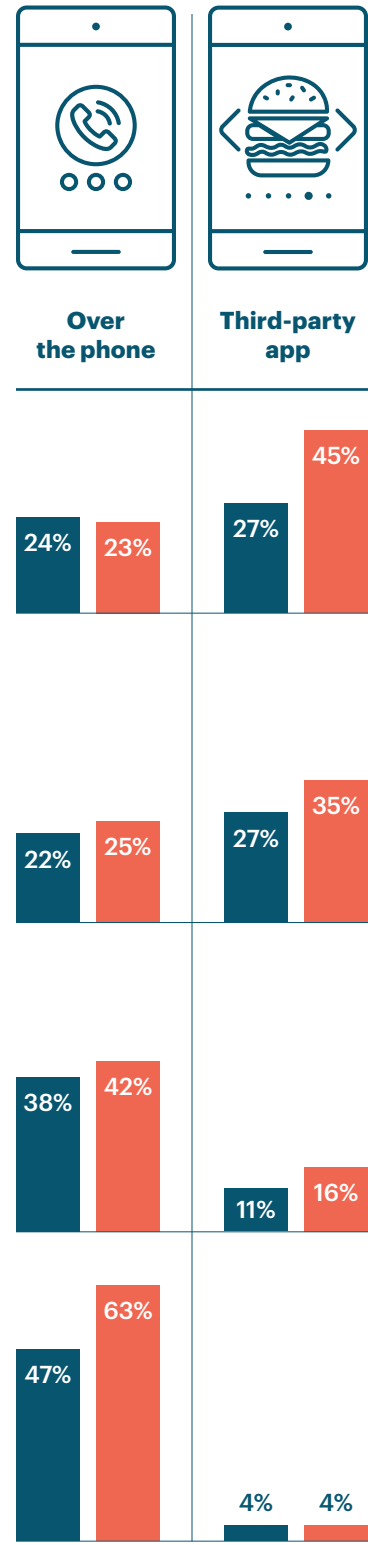
How Diners Usually Place a To-Go Order

	U.S.	Canada
Over the phone	35%	42%
Through a third-party app (i.e. Uber Eats)	15%	20%
Through a discovery app (i.e. Tock)	3%	2%
Directly through a restaurant’s website	38%	26%
Other	6%	5%

“If the restaurant that we want to order from is on a third-party app, we’ll usually use that. If it’s not, we’ll just pick up the phone and we’ll call the restaurant. I like calling because if there’s something specific that I’m asking for, like my partner always wants extra protein, I prefer actually talking to a person.”

(Female, 25-34, British Columbia, Canada)

Order Method by Age



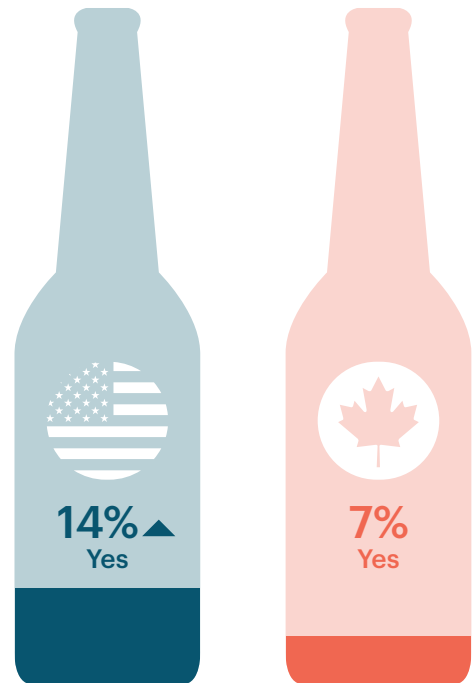
Diners Want Apps That Offer Flexibility

As when it comes to online ordering, diners have some clear preferences. In terms of the platforms they like to use, DoorDash took the #1 spot in the U.S. with 68% of Americans using the app, while Uber Eats was the top platform in Canada with 64% of Canadians using the app. As for online ordering features, both American and Canadian diners overwhelmingly want the option to pre-schedule their pickup and delivery orders, followed by the desire for a dedicated drive-thru for mobile orders, and the option to save their order history/favorite orders.

What diners don't seem to care about? The option to add alcohol to their takeout or delivery orders. Just 14% of Americans and 7% of Canadians said that the option to add alcohol to their takeout order influenced their decision.

Alcohol as a Deciding Factor in Takeout

Is ability to add alcohol to takeout a determining factor when ordering?



Popularity of Third-Party Ordering Apps in the U.S. and Canada

	U.S.	Canada
Uber Eats	56%	64%
DOORDASH	68%	42%
Postmates	16%	4%
GRUBHUB	36%	2%
SKIP THE DISHES	7%	59%
delivery.com	15%	3%
RITUAL	7%	6%
Other	1%	2%

Total Popularity of Third-Party Ordering Apps by Generation

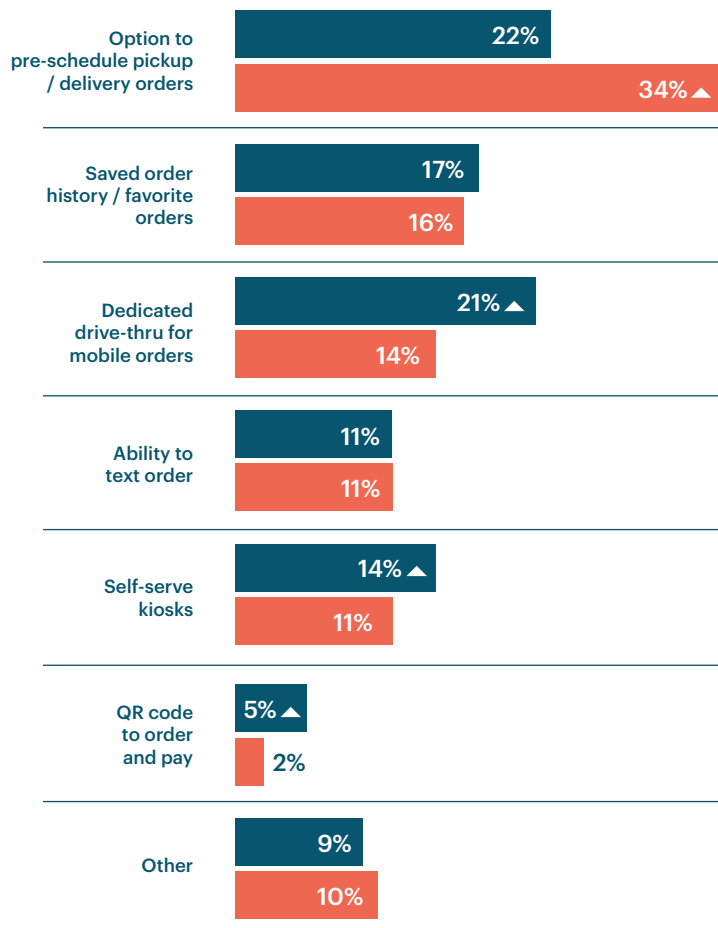
	Gen Z	Millennial	Gen X	Boomers
Uber Eats	55%	62%	59%	54%
DoorDash	60%	54%	55%	64%
Postmates	13%	12%	6%	5%
GrubHub	8%	20%	21%	45%
Skip the Dishes	28%	31%	34%	32%
delivery.com	10%	12%	4%	6%
Ritual	7%	8%	6%	0%
Other	0%	0%	5%	5%

“Now I can place orders on my mobile phone. By the time I get there, it's ready and I don't even have to get out. Somebody will bring it to my car. ...I have started using [ordering apps] a lot more because the conveniences that opened up because of COVID were actually things that I wanted even before I knew I wanted them. So now when I think I want to have a specific meal or a specific snack, it's not about, 'oh, I have to get in the car, I have to waste gas, and I have to take all this time to go.' Now I can just open my mobile app.”

(Female, 45-54, Florida, U.S.)



Desired Takeout Innovations



“I’m ordering online now more because it’s actually becoming easier. A lot of restaurants have gone and added their own apps [so] it's easier to pay; it's easier to order. One of the big things for us was that it was hard to customize your order. But now, restaurants have made it so you can go in and customize your order on their app or website. That’s really changed how I do things.”

(Male, 35-44, Washington, U.S.)

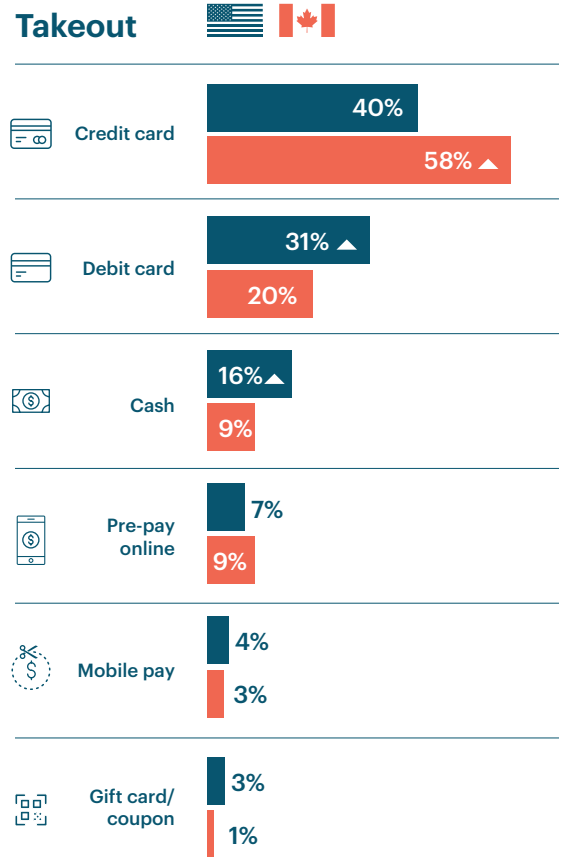
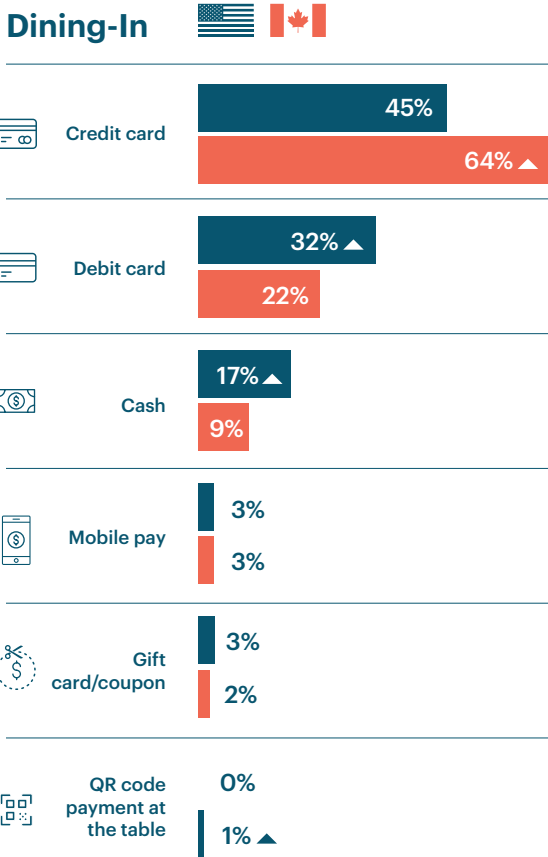




The Credit Card is King

Whether they're ordering takeout or dining in, diners overwhelmingly want to pay by card – especially diners in Canada. A whopping 64% of Canadian diners prefer to pay by credit card when dining in, versus just 45% of American diners. The same is true when it comes to takeout, with 58% of Canadians choosing to pay by credit card, while just 40% of Americans prefer this method. For most American diners, using a debit card is still one of the most common payment methods.



Preferred Payment Method



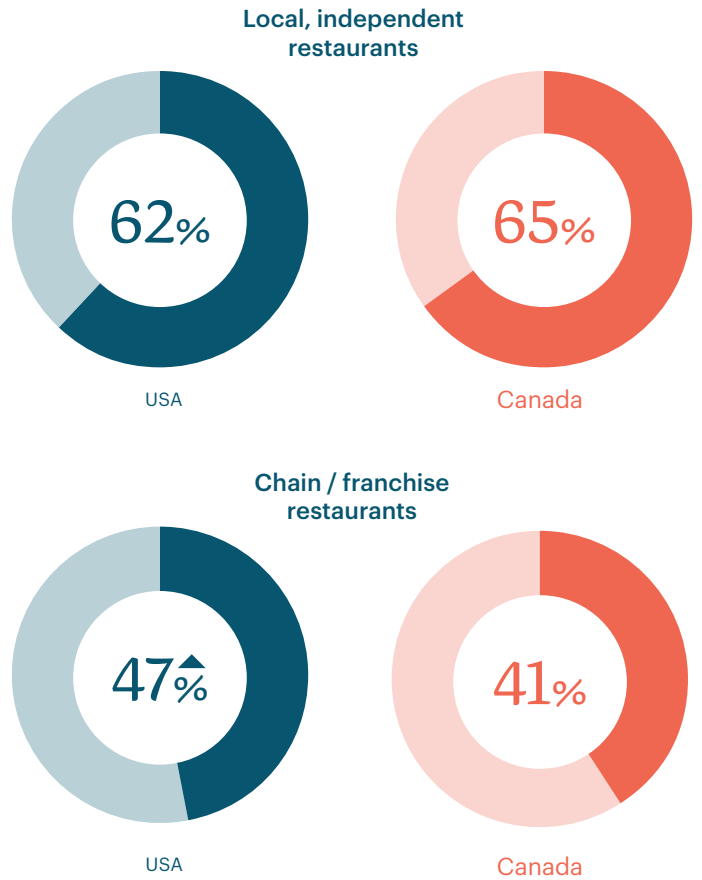
Local Wins Out

When it comes to the type of restaurants diners are visiting, nearly two-thirds of diners (63%) head to local, independent restaurants over chains or franchises. However, this trend is more pronounced among older generations, with almost three-quarters (70%) of Boomers seeking out local restaurants, but less than half of Gen Z diners doing the same.

% Seek Local, Independent Restaurants

Gen Z		
	40%	56%
Millennial		
	55%	61%
Gen X		
	65%	63%
Boomers		
	69%	72%

Types of Restaurants Sought



“I do definitely like to support a smaller family-owned place rather than a chain restaurant. If I have the option, I would of course much rather support the little family-owned place. It’s been a tough few years for everyone, but the mainstream places are always busy – they haven’t taken a hit as much as maybe the little family-owned places that fewer people know about. I usually have a better experience at smaller places because they care more about their customers coming back.”

(Female, 25-34, British Columbia, Canada)

Diners Stick to the Spots They Know

Whether it's a local hotspot or a national chain, the majority of diners prefer to revisit their favorite spots more frequently over trying brand new restaurants. In fact, 35% of Americans and 40% of Canadians said they rarely, if ever, try a new restaurant they've never been to before. Of course, this is not true across all age groups. Younger generations are much more adventurous, with 57% of Gen Z diners and 41% of Millennials saying they visit new restaurants at least once a month or more often.

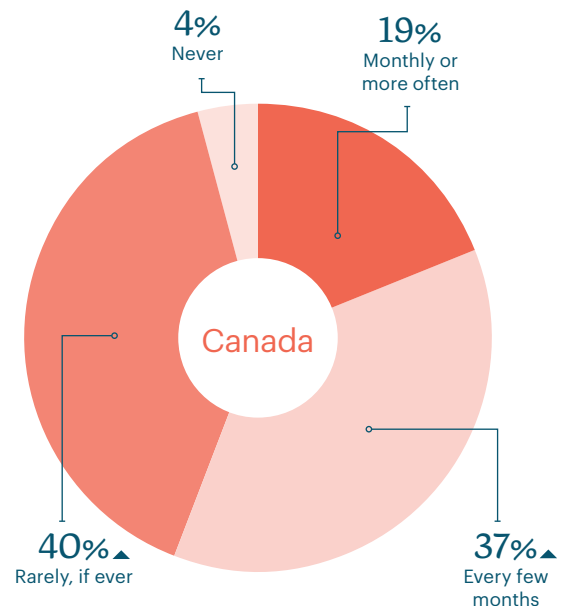
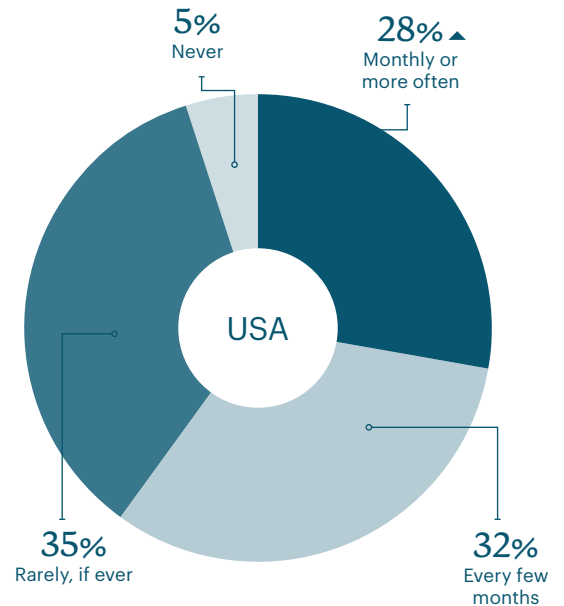
% Visit New Restaurants Monthly or More Often

Gen Z	USA	Canada
	56%	57%
Millennial	47%	32%
Gen X	24%	12%
Boomers	12%	5%

"I usually tend to stay in one area, so it's mostly repeated restaurants. But I am very open minded so I love to try new restaurants when I can."

(Female, 25-34, Ontario, Canada)

Frequency of Visiting New Restaurants



Reservations More Popular Among Younger Diners

When diners do head out, they're not usually making a reservation. Only 10% of diners say they always or usually make a reservation, and just over a quarter (28%) say they occasionally make a reservation.

While it may seem as though reservations are waning in popularity, this is not true among younger diners. 37% of Gen Z and 32% of Millennials say they occasionally make a reservation, versus just 24% of Gen X and 24% of Boomers. This suggests that reservations are still very much a part of the dining experience for younger consumers, regardless of whether it is a special occasion or not.

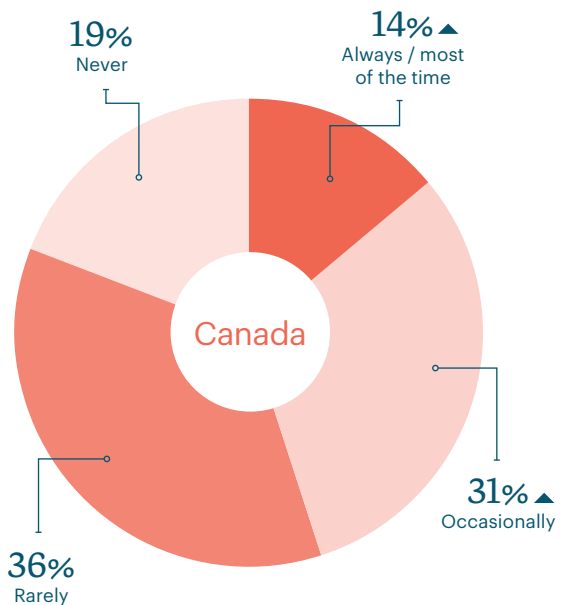
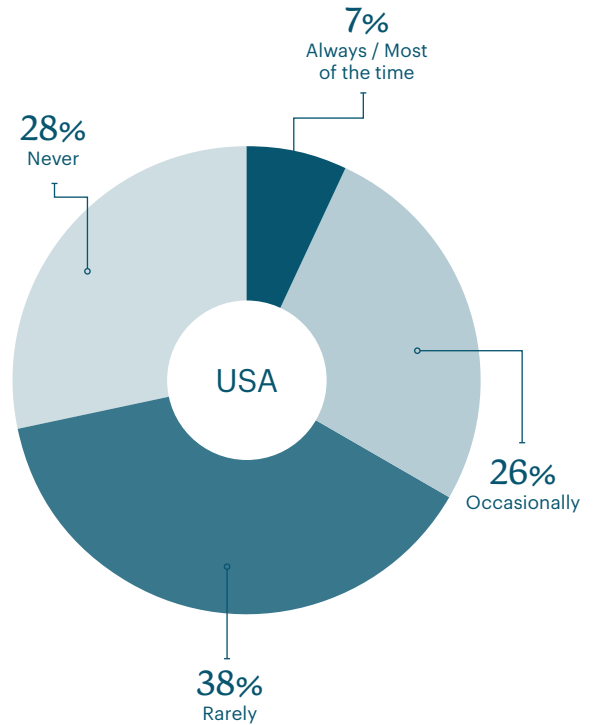
Frequency of Making a Reservation by Generation

Gen Z	Always	Occasionally
	10%	37%
Millennial	Always	Occasionally
	11%	32%
Gen X	Always	Occasionally
	8%	24%
Boomers	Always	Occasionally
	9%	24%

“I want to explore a little bit more with restaurants. So if there's a new restaurant that someone recommended to me, or this restaurant that I've never tried, I'm more keen to try it now.”

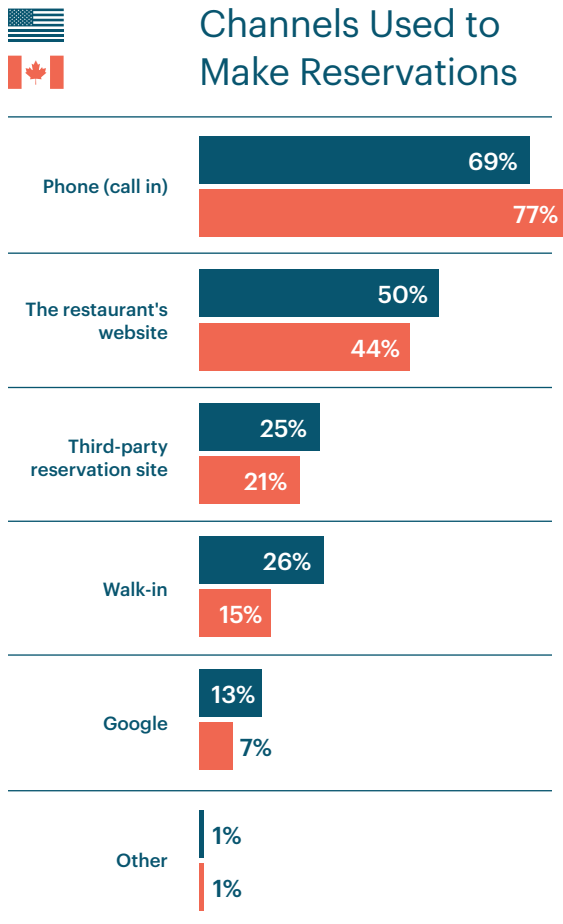
(Female, 25-34, Ontario, Canada)

Frequency of Making Reservations



Making Reservations the Old Fashioned Way

Among the diners that do make reservations, the majority of them pick up the phone. Calling in was by far the most popular way to make a reservation with 73% of diners saying this was their preferred method. However, using a restaurant's website, Google, or a third-party app were increasingly popular among younger diners.



How Diners Decide

While diners primarily decide where to eat based on what they're craving, online reviews and social media increasingly play a role – especially among the digital generations.



Diners Follow Their Cravings

Unsurprisingly, the majority of diners (72%) choose where they want to dine in based on what kind of food they want to eat. In fact, for three-quarters of Millennials, Gen Xers, and Boomers, the type of food a restaurant offers is the number one deciding factor.

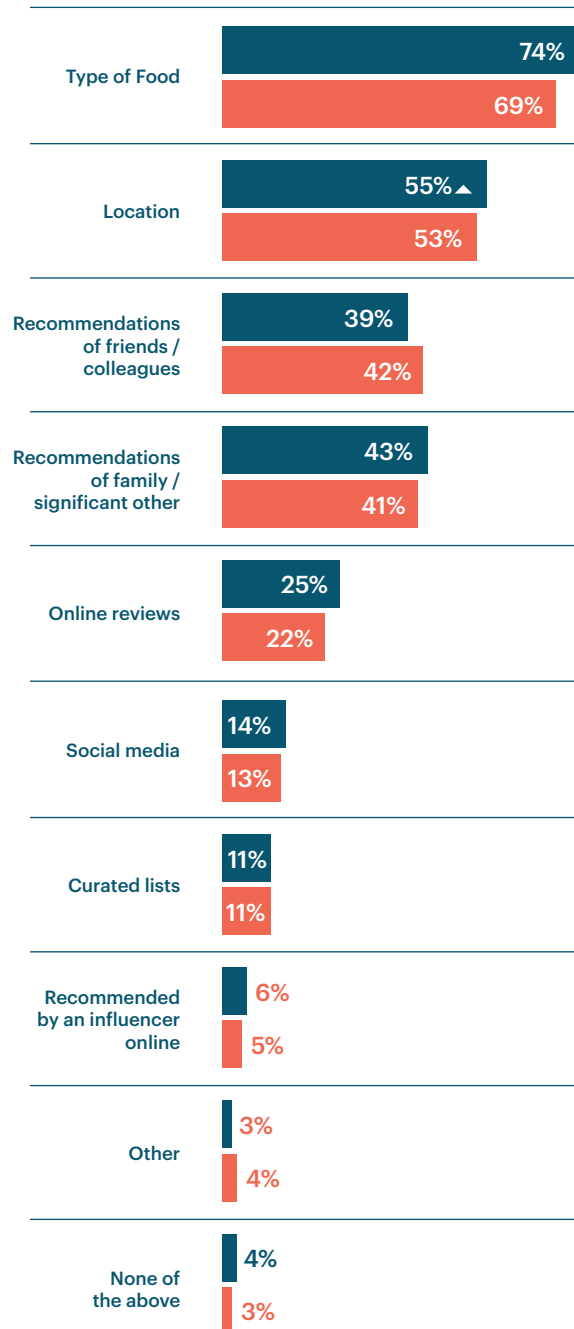
“My biggest thing is food, first and foremost. But location is also a factor. We're not going to drive 30 minutes up north to get a burger. If I'm hungry now or going to be really hungry soon, I don't want to drive that far away to get something. I'd [rather] find some place in the area of where I'm at, especially now with gas prices the way they are.”

(Male, 35-44, Washington, U.S.)

Cuisine is also a deciding factor when it comes to takeout and delivery orders with 59% of diners ranking the type of food offered as the number one most important factor in where they choose to order from. This is largely because diners who are ordering in are more concerned with how the food tastes since they won't be able to send it back if it isn't how they expected it to be.



How Diners Decide Where to Eat

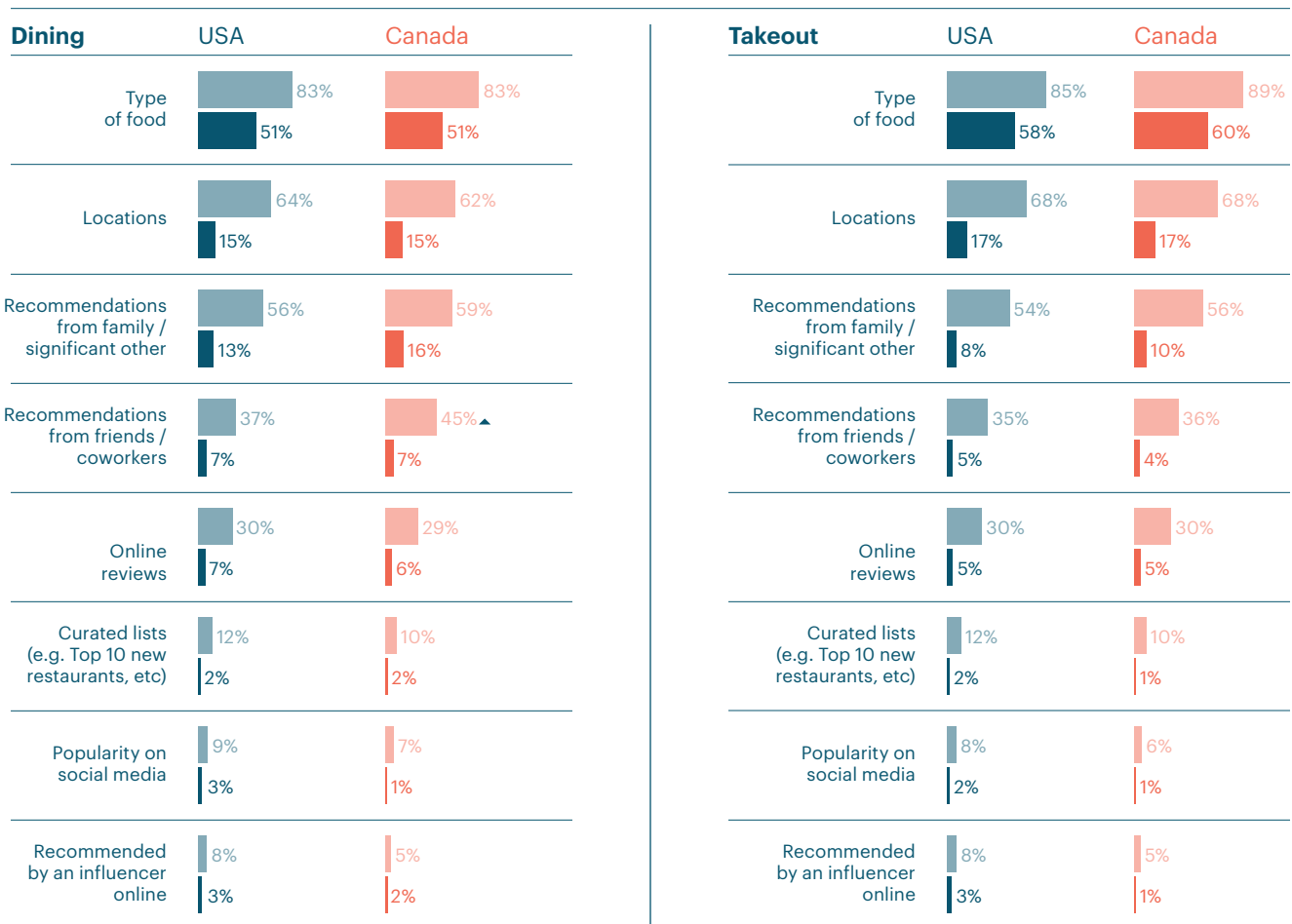


3-in-4 American Millennials, Gen Xers, and Boomers decide on a restaurant based on type of food while only **2-in-3** Gen Z diners do the same.

“When I'm ordering from Uber Eats, it's just takeout. I don't feel like the experience really matters as much as the value of what I'm getting and whether it meets my specific needs at the moment.”

(Female, 45-54, Florida, U.S.)

Impact of Dining and Takeout Decisions



Top 3 Factors Influencing Dine-In and Takeout Decisions



Recommendations Matter When It Comes to New Restaurants

When it comes to trying brand new restaurants, recommendations can also go a long way. 86% of diners said they were convinced to try a restaurant they've never been to before based entirely on the recommendations of family or a significant other, while 81% said they were swayed solely by the recommendation of a friend or co-worker.



Made a decision to try a new restaurant based solely on recommendations from family/a significant other



Made a decision to try a new restaurant based solely on recommendations from friends/co-workers

“It will usually come up in conversation like, ‘Oh, have you been to this place yet?’ And if they have something really great to say about it, I’m pretty eager to try it.”

(Female, 25-34, British Columbia, Canada)



“I’d say I trust friends and family the most when it comes to restaurant recommendations – they’re not going to lie to you. But influencers get paid. So, to me, that means [they’re] automatically biased.”

(Male, 35-44, Washington, U.S.)

Younger Diners Swayed by Reviews and Social Media

While the type of food, location, and recommendations from family and friends may have the biggest influence on where diners choose to eat, there are signs that things are starting to shift. Back in 2017, our [How Diner Choose Restaurants Report](#) found that just 7% of diners said online reviews influenced their decision and just 3% said social media was a factor. Today, 24% of total diners say that online reviews influence where they decide to eat and 14% say social media is a deciding factor. These numbers are even higher among younger diners with 37% of Millennials saying online reviews help them decide where to eat, while 28% of Gen Z says that social media influences their decision.





“I definitely look up reviews. I'll look online and get a basic idea of whether most of them are kind of saying the same thing. I also go through quite a few to look just to make sure there aren't any paid reviews saying every single thing is five stars. I actually kind of look for a couple of reviews that aren't quite perfect just to know that it's real. I'm looking for honest reviews and I know that not every single person who goes into a restaurant will have a five-star amazing experience.”



(Female, 25-34, British Columbia, Canada)

% Influenced by Online vs. Social Media Reviews

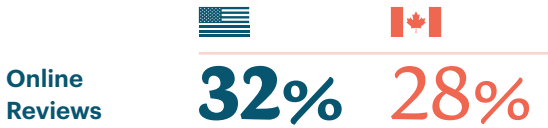
☆ Online Reviews

		
Gen Z	28%	37%
Millennial	38%	37%
Gen X	25%	17%
Boomers	15%	14%

👍 Social Media

		
Gen Z	26%	32%
Millennial	26%	27%
Gen X	11%	6%
Boomers	3%	2%

How Those Who Dine Out Once a Week or More Decide Where to Eat

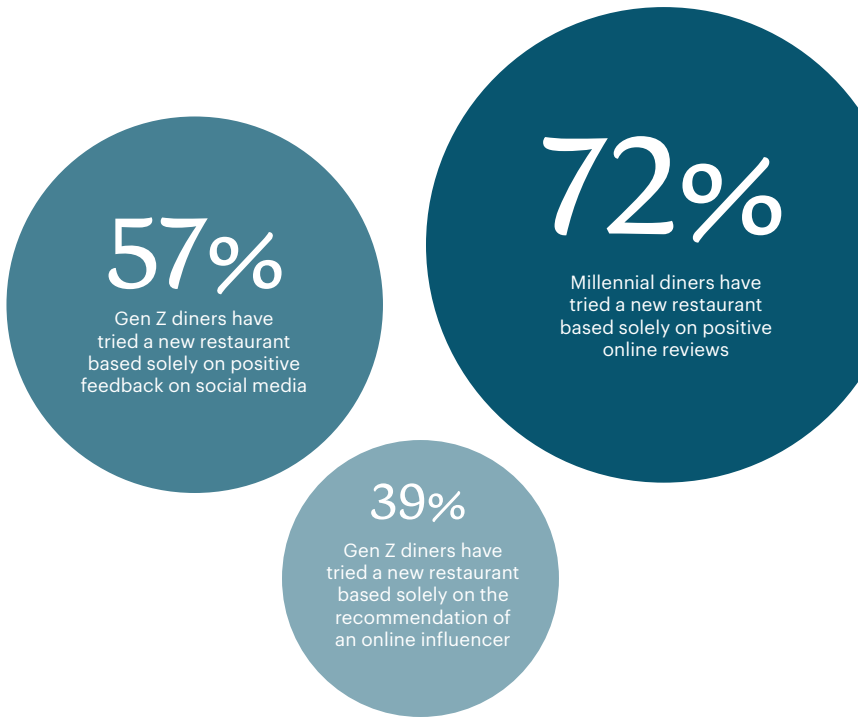


“If I’m trying to determine the quality of food, I use social media. I go to YouTube, Twitter, Facebook, or Instagram to try to find people who have done reviews on those particular places and then get the best information about the quality of food that they have on their particular menu.”

(Male, 35-44, Ontario, Canada)

For New Restaurant Recommendations, Younger Diners Go Online

And when it comes to trying brand new restaurants, digital generations are overwhelmingly swayed by online reviews, positive feedback on social media, and influencers. In fact, 71% of Gen Z diners and 72% of Millennial diners have tried a new restaurant based solely on positive online reviews. Gen Z diners are also more likely to be influenced by online celebrities, with more than a third (39%) saying they’ve tried a new restaurant based entirely on the review of an online influencer.



“I mostly use Instagram... If there’s a restaurant I’m interested in trying or somewhere that I’ve had a really good experience with, I would follow them. I actually recommended a place to my sister because I saw them post that they have this new dish.”

(Female, 25-34, British Columbia, Canada)

When it Comes to Reviews, Diners Google It

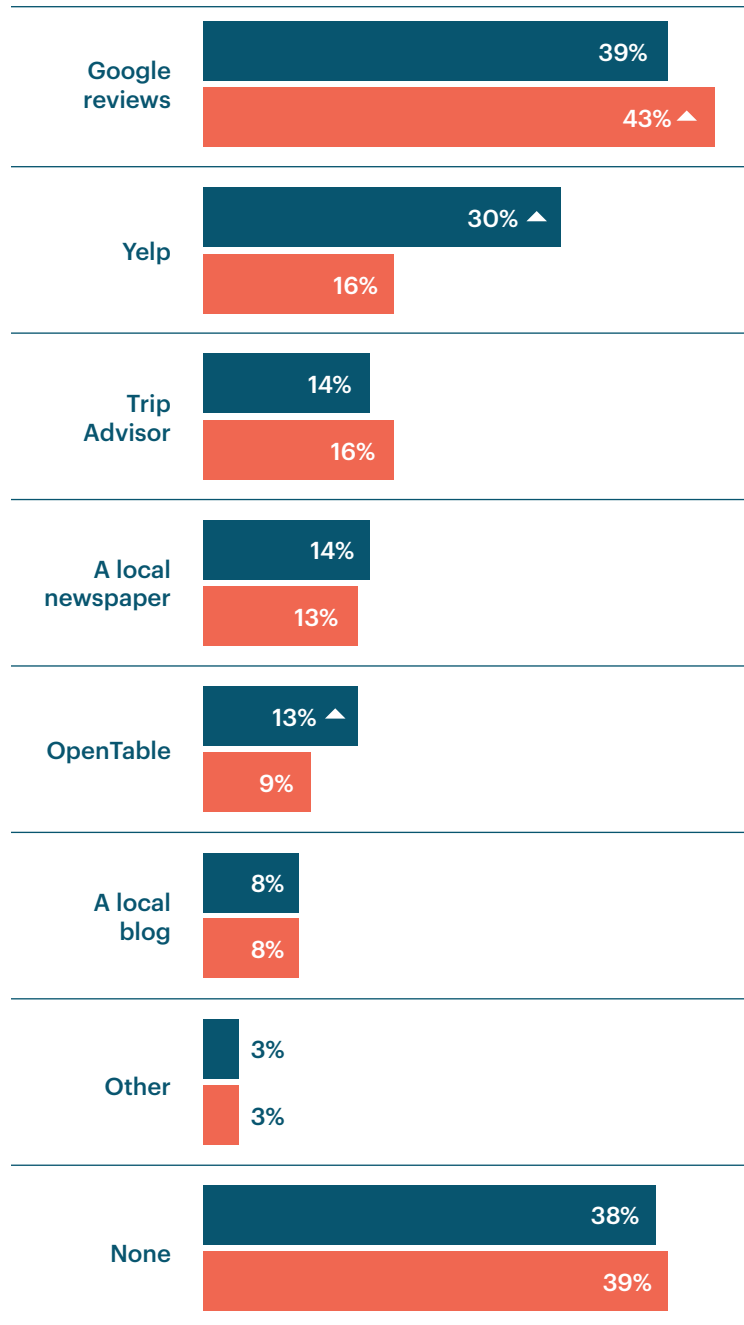
Among diners who do turn to online reviews, Google is their preferred source of information, with 39% of Americans and 43% of Canadians seeking out Google reviews in the past three months. However, in the U.S., Yelp is a close second, with 30% of Americans using Yelp reviews to make dining decisions (versus just 16% of Canadians).

“I usually just Google it just to see the star reviews. If I came across a restaurant selling on Uber Eats and I don't know much about it, I would Google [it] and see what their reviews are. I also look at the restaurant's pictures and customer reviews. Usually, if it's a high review and friends have strongly recommended it and they say it really is good, I think [those are] the two factors I take on.”

(Female, 25-34, Ontario, Canada)



Restaurant Review Sources Used



Digital Generations Turn to Instagram

In addition to online review sites, social media increasingly plays a role in diner decisions. And while Facebook remains the most influential platform for diners across generations, 30% of Gen Z diners and 20% of Millennial diners say they turn to Instagram to figure out where to eat.

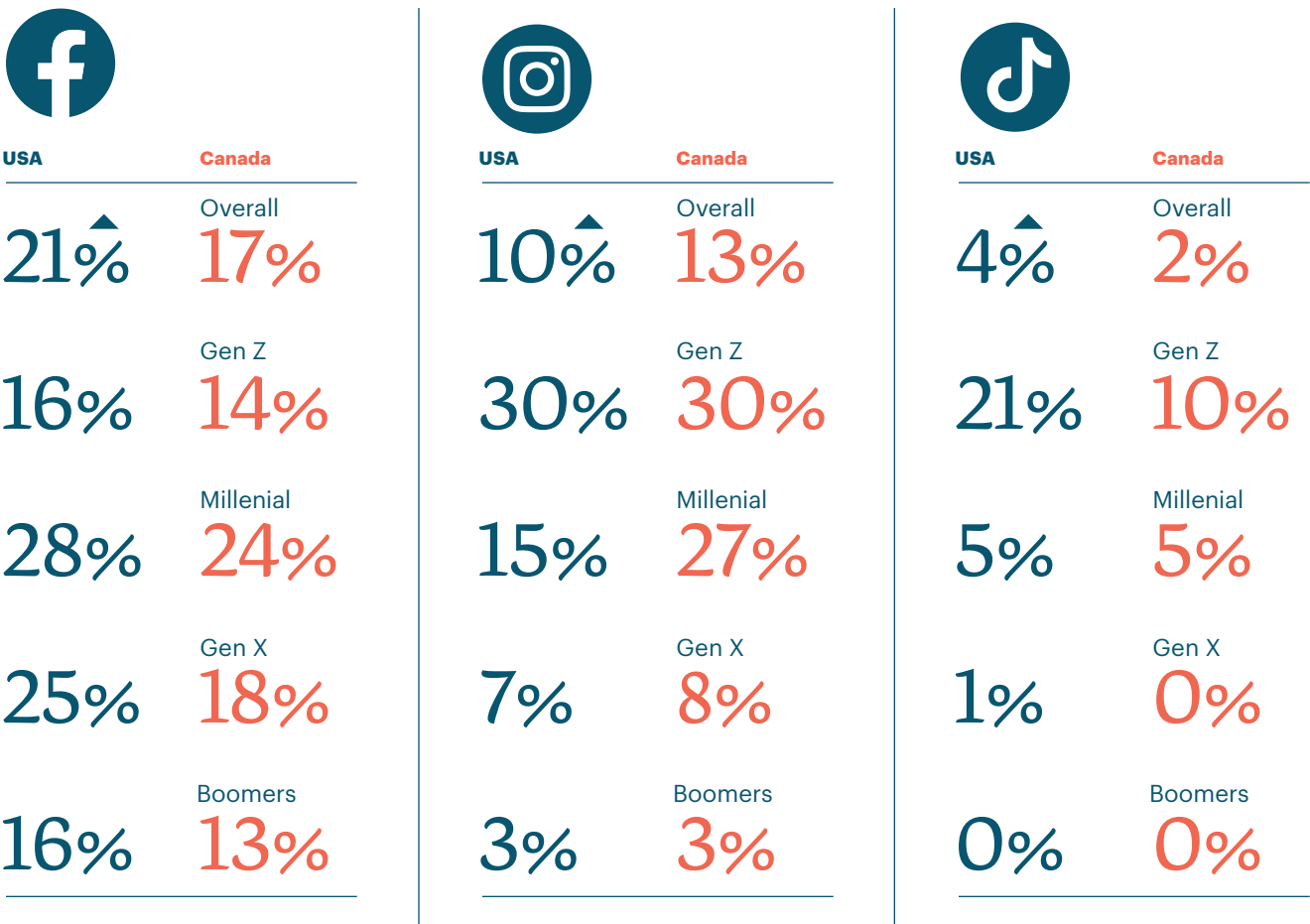
In the U.S., TikTok is also gaining major influence, with one-in-five (21%) Gen Z diners turning to the platform before dining out. There's no question that if today's restaurants want to attract a younger crowd, a presence on Instagram (and increasingly TikTok) is essential.

“I'm in a restaurant group on Facebook where people seem to post pretty honest reviews with lots of good details. So I will just kind of scroll through and if a lot of people are saying they've had great food, it's going to be in the back of my mind that I might want to try that place depending on when we're gonna order takeout [next].”

(Female, 25-34, British Columbia, Canada)

The Influence of Social Media Platforms on Where Diners Choose to Dine

Top 3 Influential Platforms



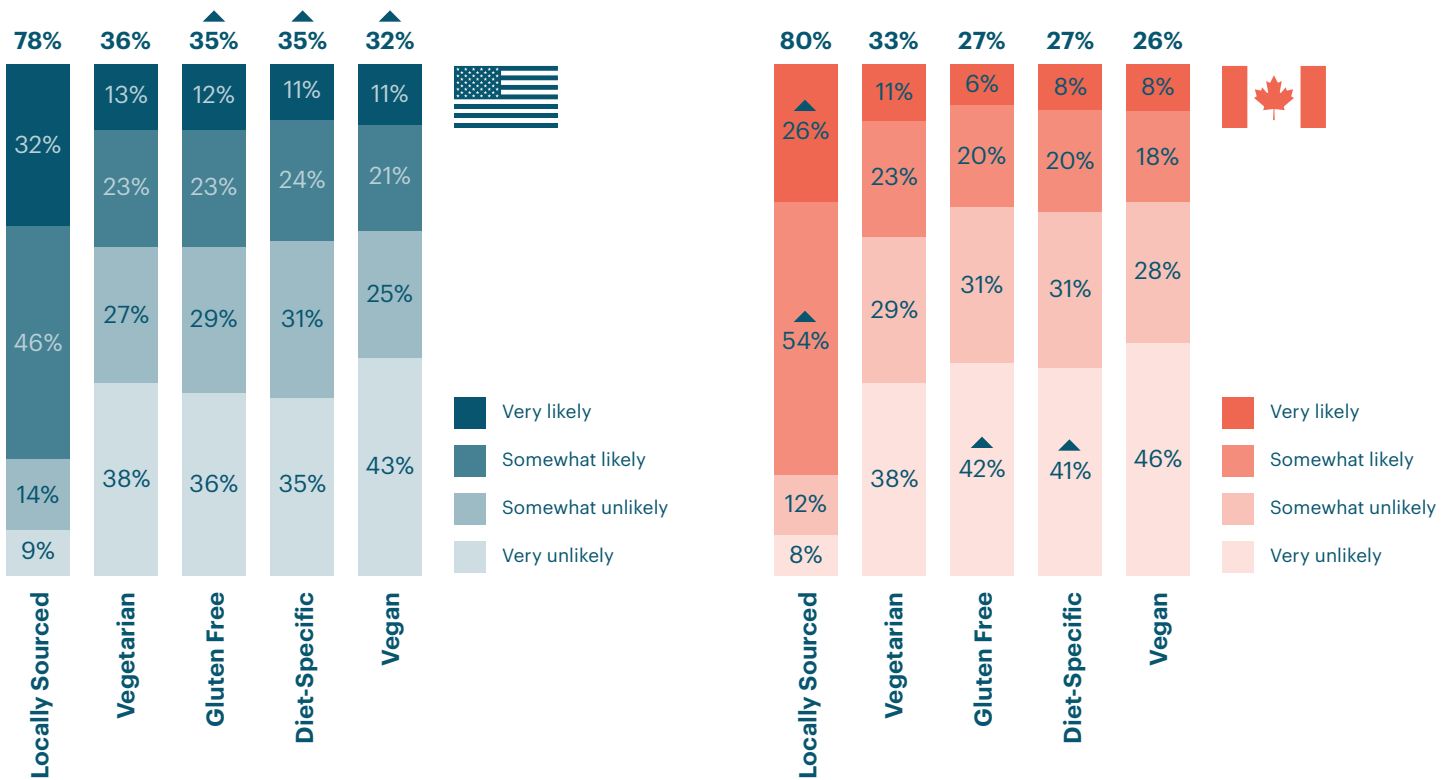
Locally Sourced Attracts Local Diners

When diners are trying to decide on a restaurant, they're not only looking at the type of food a restaurant offers, but also where that food is coming from. A whopping 78% of American diners and 80% of Canadian diners said that locally sourced ingredients were very likely or somewhat likely to influence their decision to choose a specific restaurant. This represents a major increase from 2017 when just 49% of restaurant-goers said that locally sourced food would have an impact on their dining decisions.

"I think it is an important aspect of dining to know where our food comes from. I don't know why it never occurred to me to be more conscientious about that... I think I would like to embrace more of that aspect of clean, conscious eating..."

(Female 45-54, Rhode Island, U.S.)

Impact of Food Offering on Willingness to Visit



vs. 2017

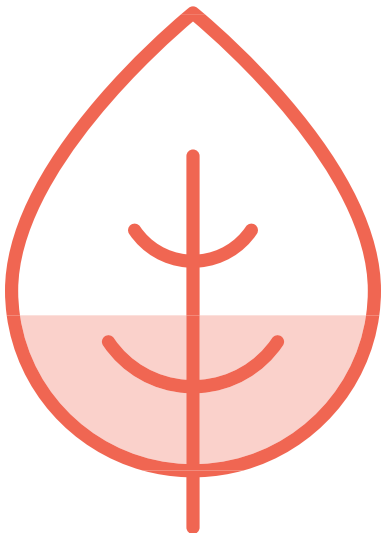
Locally Sourced **49%**

“I'm not big on certain animal products. I was a strict vegetarian for 20 years and I got so tired of roasted red pepper this and that. I still tend to go for plant-based meals so I really look for all the different options and there are so many lately.”

(Female, 45-54, Nova Scotia, Canada)

A Growing Taste for Plant-Based

And while locally sourced ingredients appear to have the biggest impact on diner decisions, a third of diners (34%) also reported that a restaurant offering vegetarian food was very likely or somewhat likely to influence their decision to eat there. Plant-based offerings were especially popular among younger diners, with 42% of Gen Z and 42% of Millennials saying they were very likely or somewhat likely to visit a restaurant with vegetarian offerings, and 41% of Gen Z and 39% of Millennials saying the same about restaurants with vegan offerings.





34%
of diners say
vegetarian
offerings would
influence their
likelihood to visit



When Trying to Decide, Diners Look Online

With the majority of diners saying food and price were the top two most important factors influencing their dining experience, it comes as no surprise that online menus are in high demand. 84% of restaurant goers always or often look up a restaurant menu ahead of time, and 79% always or often look at a restaurant’s website. This is a big jump from 2017, when just 59% said they looked at a restaurant’s menu ahead of time and only 51% looked at the restaurant’s website beforehand.

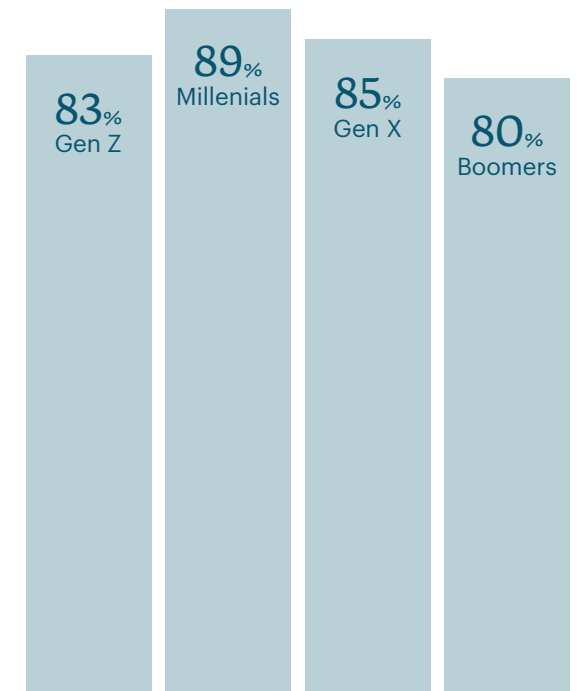
Diners Who Always/Often Do the Following Before Deciding on a New Restaurant

			2017
Look at the restaurant’s menu online	85%	84%	59%
Look at the restaurant’s website	80%	78%	51%
Take recommendations from family/a significant other	78%	79%	
Take recommendations from friends/co-workers	73%	76%	
Look at the restaurant’s online reviews	64%	66%	
Google search	65%	64%	
Look at the restaurant’s social media	41%	39%	

“If I've never been there before, absolutely I want to see what they have before I go. I'm specifically looking for what foods they offer and what dishes they have. I find myself looking at online menus to make sure that there's going to be food there that whoever is with me will actually eat. I don't want to walk into a restaurant to find out that there's nothing there for us to eat.”

(Male, 35-44, Washington, U.S.)

How Many Diners Often Look Up Online Menus Ahead of Time



What Deters Diners

While it's incredibly valuable to know what gets diners in the door, it's equally important to understand what keeps them out. And these days, it turns out that a bad reputation is much more likely to turn diners off than high prices.



A Bad Reputation Keeps Diners at Bay

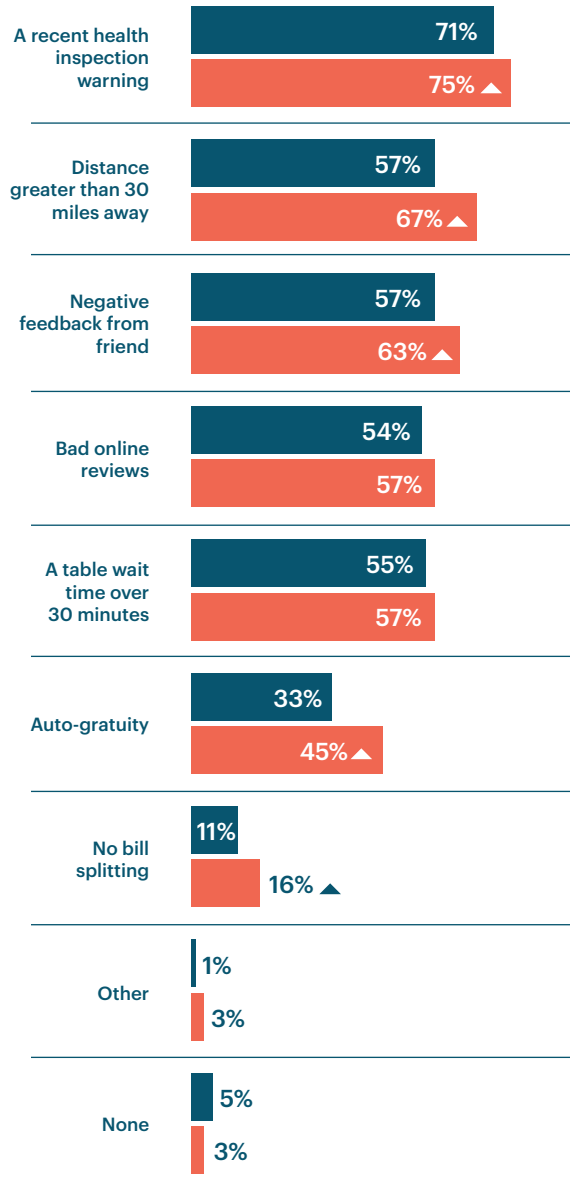
Though the majority of diners are no longer concerned with pandemic-related safety protocols, health and hygiene is still very much on diners' minds. 73% of diners say a recent health inspection warning would deter them from visiting a restaurant, making this the number one reason customers avoid certain venues. Distance and negative feedback were also major deterrents with 61% saying a distance greater than 30 miles would keep them away and 59% saying negative feedback from a friend would be a major deterrent.

“Hygiene is important. I have my standards, but I also have to trust the fact that the people behind the counter are meeting health guidelines, and that there are certain standards and procedures that they're following.”

(Female, 45-54, Rhode Island, U.S.)



Restaurant Visit Deterrents



Boomers Sensitive to Health Warnings and Auto-Gratuity

However, younger generations appear to be much more forgiving of the top deterrents, while Boomers are significantly concerned with cleanliness and auto-gratuity. In fact, nearly half (46%) of Boomers said they would be deterred from visiting a restaurant if it had auto-gratuity, while just 19% of Gen Z said the same.

“Auto-gratuity generally doesn’t bother me. It’s usually when [I’m with a] large party that they add the gratuity. However, I was recently out with a friend, just the two of us, and they added the gratuity – it was like 18%. It wasn’t great service at all. We just let it go and we paid the gratuity. But would I go back to that restaurant? Probably not.”

(Male, 35-44, Washington, U.S.)



% Visit Deterrents by Generation



Health Inspection Warning

Gen Z		
	58%	58%
Millennial		
	63%	64%
Gen X		
	71%	79%
Boomers		
	82%	87%



Auto-Gratuity

Gen Z		
	17%	22%
Millennial		
	25%	33%
Gen X		
	35%	53%
Boomers		
	42%	54%

Restaurants Can Recover from Poor Customer Service...

Gen Z is also quite forgiving when it comes to poor customer service. In fact, 63% of all Gen Z diners said they would revisit a restaurant if the service was bad, but the food was good. And across generations, over half (57%) of diners in the U.S. and Canada said they'd be willing to do the same.

“Even if we’ve had a bad experience, we usually try to go again. You know that could have been one-off. But if it's more than once, it just gets crossed off the list cause it's not a one-off at that point.”

(Male, 35-44, Washington, U.S.)

...But Restaurants Can't Recover From Negative Feedback

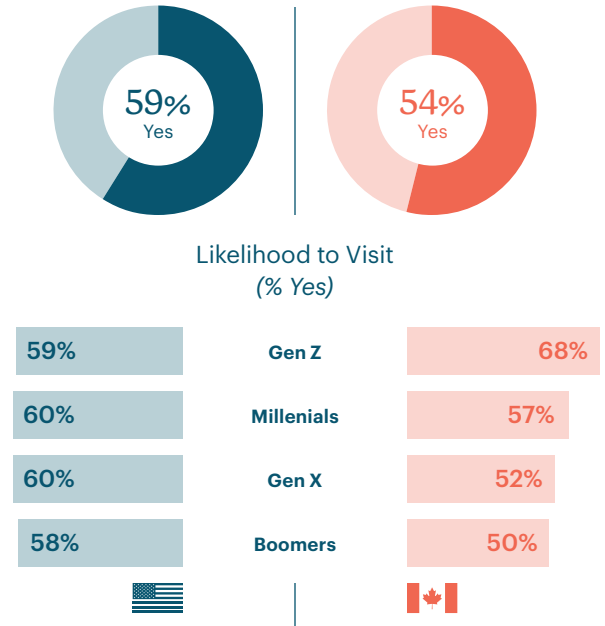
However, when poor customer service leads to negative feedback, that's when diners are more likely to keep their distance. In fact, more than half (58%) of diners admit that they have decided to skip a restaurant due to negative feedback. Overall, Gen Z diners in the U.S. are the least forgiving of negative feedback, with 70% saying they've been deterred from visiting a restaurant after negative reviews from friends.

“If I see that a restaurant has really bad reviews for service, I'm like 'oh, I won't go there because clearly, they don't have their customer service down.' Or if someone said they waited like 2 hours to get a table, I might pay attention to that.”

(Female, 45-54, Nova Scotia, Canada)

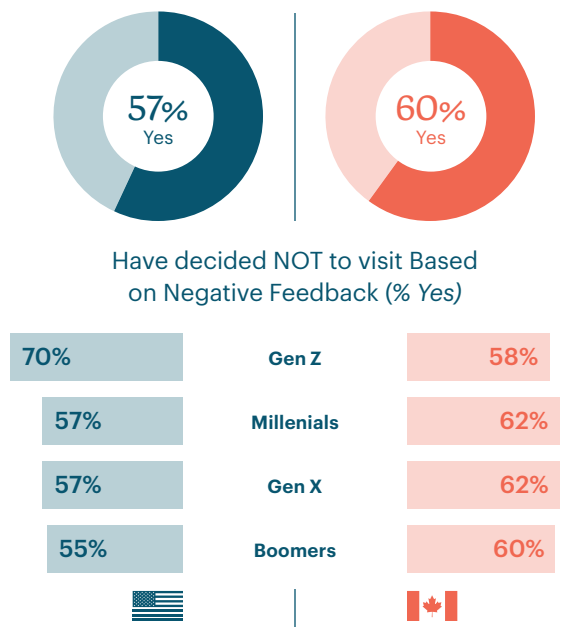
Restaurants and Customer Service

Would you revisit a restaurant if the **food was good but service was bad?**



Decided Not to Visit Based on Negative Feedback

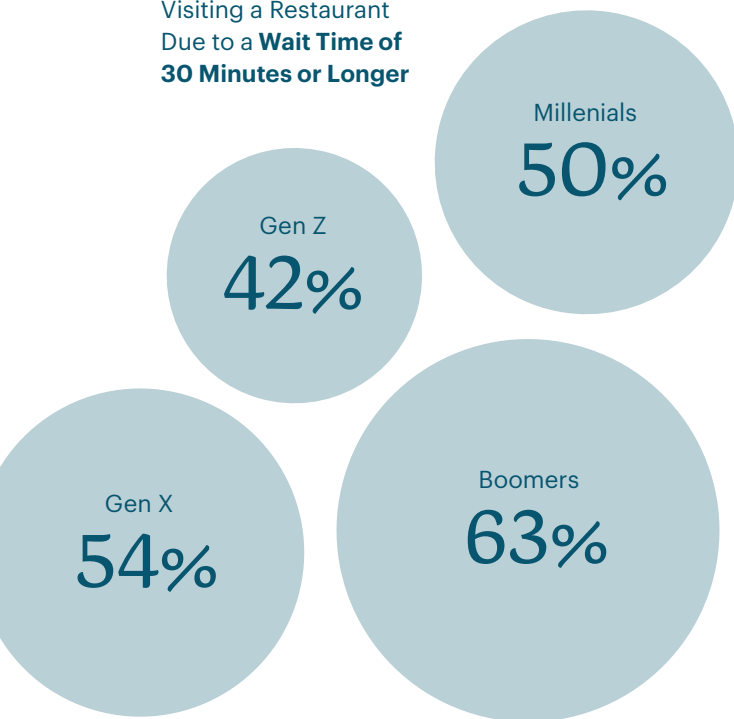
Ever decided **NOT** to go to a restaurant based entirely on **negative feedback from friends?**



Diners Do Not Want to Wait

While it is not one of the top deterrents, a long wait time can quickly turn diners away. 55% of American diners and 57% of Canadian diners said that a table wait time longer than 30 minutes would deter them from going to a restaurant. This is a major increase from 2017, when just 32% of diners said they would be deterred from visiting a restaurant with a wait time of 30 minutes or more. Moreover, Boomers are particularly sensitive to wait times with 63% saying they would not wait longer than 30 minutes for a table.

Would Be Deterred from Visiting a Restaurant Due to a **Wait Time of 30 Minutes or Longer**



“First and foremost, wait times would be the biggest deterrent. Because if I walk in and they say it's going to be 45 minutes, I'm probably hungry already so I'm not gonna want to wait another hour or 45 minutes for a table. 30 minutes is about the max I would wait.”

(Male, 35-44, Washington, U.S.)

Infrequent Diners Paying Close Attention to Prices

Even with a stellar reputation, a price hike may deter some diners from visiting a restaurant. In fact, around one-in-five diners (22%) say that a price increase would *significantly* impact their decision to visit a restaurant. Of the diners who said that a price increase would have a significant impact on their decisions, 28% of those were diners who said they dine out less than once a month, suggesting that infrequent diners are the ones most sensitive to price changes.



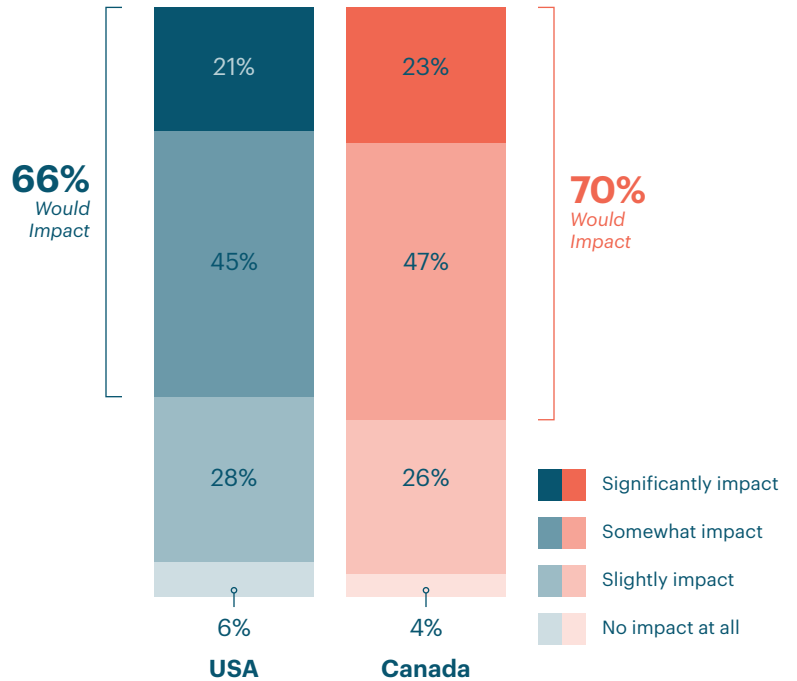
Most Diners Willing to Absorb Some Menu Price Increases

In contrast, nearly half of diners – 45% of Americans and 47% of Canadians – say that menu price increases would only *somewhat* impact their decision to visit a restaurant, and more than a third of Boomers (35%) say that a price increase would only have a *slight* impact on their dining decisions. This suggests that while diners are sensitive to price increases, most diners are willing to pay a bit more to get the exact type and quality of food they expect – it’s up to restaurants to figure out how to strike that balance.

“I fought to the bitter end not to raise my prices. I have never raised my coffee price even though my suppliers have raised the price of beans. I do roast my own mostly, but I also buy from local roasters as well and they've raised their prices. All of my costs, my CoGS, have gone up like crazy, especially on paper products. Plus, it's so hard to source everything now and the cost has doubled. So just last week, I raised my sandwiches by a dollar. And no one said anything about it.

(Melissa Hughes, Owner, Copper Bean Café, Ontario, Canada)

Impact of Menu Price Increase on Visits



Menu Price Increase Would Impact Visits

Significant Impact – % by Generation

Generation	USA (%)	Canada (%)
Gen Z	25%	31%
Millennial	29%	26%
Gen X	23%	25%
Boomers	14%	15%

How Diners Engage

With so much competition, it's essential for restaurants to keep their venues top of mind, all the time. And when it comes to keeping diners engaged, loyalty programs and email present two untapped opportunities.



Most Diners Aren't Members of Loyalty Programs... Yet

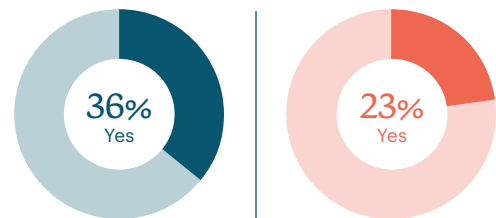
While only 36% of American diners and 23% of Canadian diners say they are currently part of a restaurant loyalty program, it's clear that these figures are on the rise. Younger generations are much more likely to be a part of loyalty programs, with a whopping 40% of Gen Z and 41% of Millennials diners in the U.S. currently part of a rewards program. This means that as these diners age, they will increasingly expect loyalty programs to be a part of their everyday dining experience.

“I use my loyalty apps at least weekly. If they send you a push notification that says something like ‘If you come in today, it’s buy one, get one free,’ then it’s like, that’s what we’re doing today. It motivates me.”

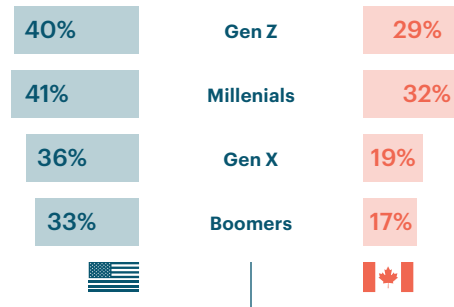
(Female, 45-54, Florida, U.S.)

Member of Restaurant Loyalty Program

Are you a member of any restaurant loyalty programs?



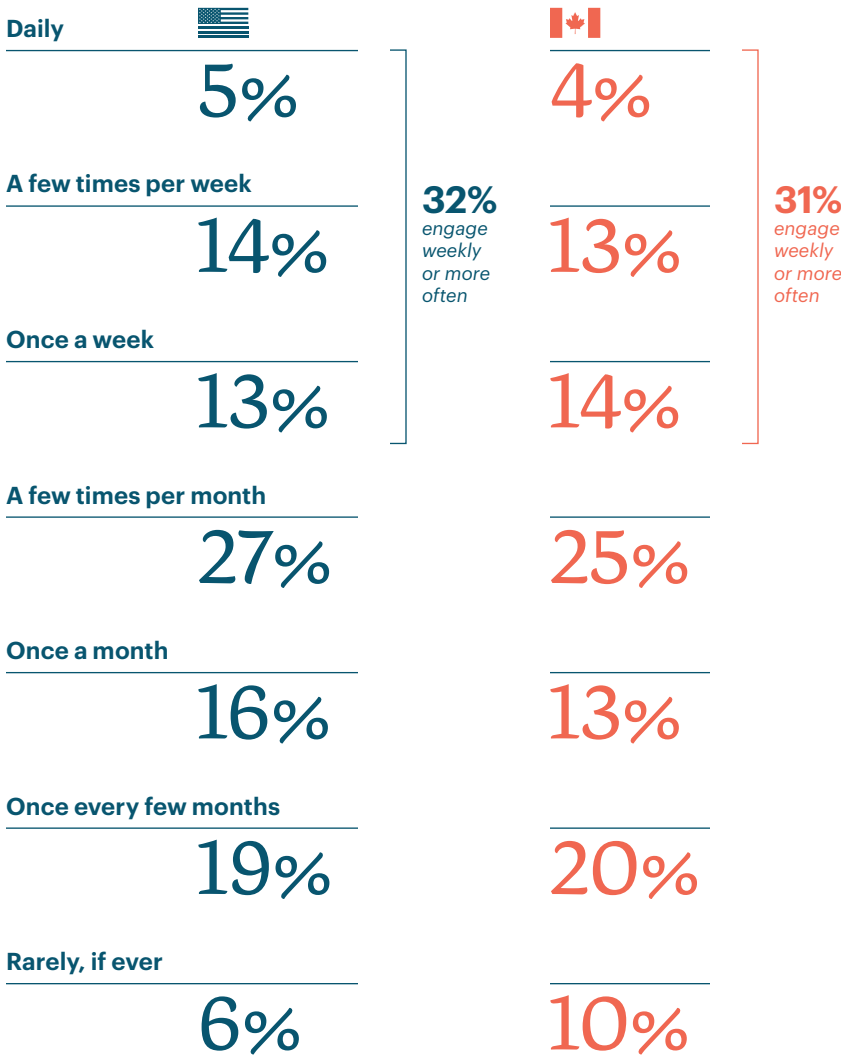
Loyalty Members by Age (% Yes)



Loyalty Programs Drive Major Engagement

Among those who are part of loyalty programs, one-third (32%) of diners in the U.S. and Canada say they engage with these programs weekly or more often. This level of engagement is even more pronounced among those who order out, with more than half of Americans (58%) and Canadians (56%) who order takeout weekly or more often engaging with loyalty programs at least once a week. This suggests that restaurants offering takeout and delivery may be able to drive significantly more engagement simply by adding a loyalty program.

Frequency of Engaging with Loyalty Programs



“If it’s someone's birthday and a restaurant has a free dessert or free appetizer, that’s a big factor. Or if you know you’ll gain points when you go, or if you eat there three times and you get a \$10 gift card.”

(Female, 45-54, Nova Scotia, Canada)

Loyalty Program Engagement Among Diners Who Order Takeout at Least Once a Week



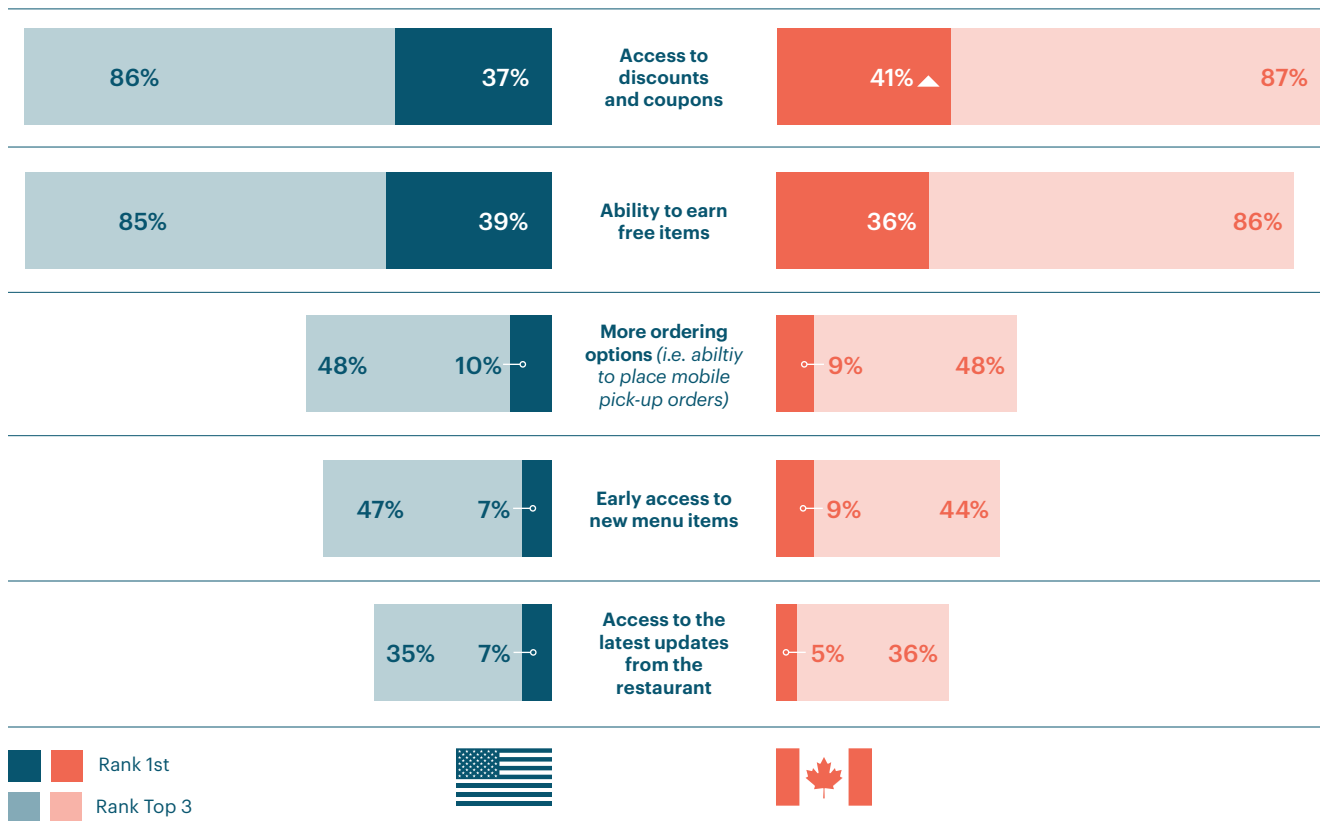
Incentives Drive Loyalty Sign-Ups

There are clear signs that loyalty programs are an untapped asset that could help restaurants drive repeat visits. And fortunately, diners are clear about what would drive them to sign up for these programs in the first place: discounts and coupons. More than three-quarters (86%) of diners displayed interest in joining a loyalty program if it provided them with access to discounts and coupons. A similar number (85%) of diners also expressed interest in a rewards program that would allow them to earn free items.

“I'm definitely somebody who, if you send me a special or a coupon or something, you are getting my number. That's exactly what I want to hear; to know that you want me to order from you because you're going to give me a special price, coupon, or something that's will make it more cost effective for me.”

(Female, 45-54, Florida, U.S.)

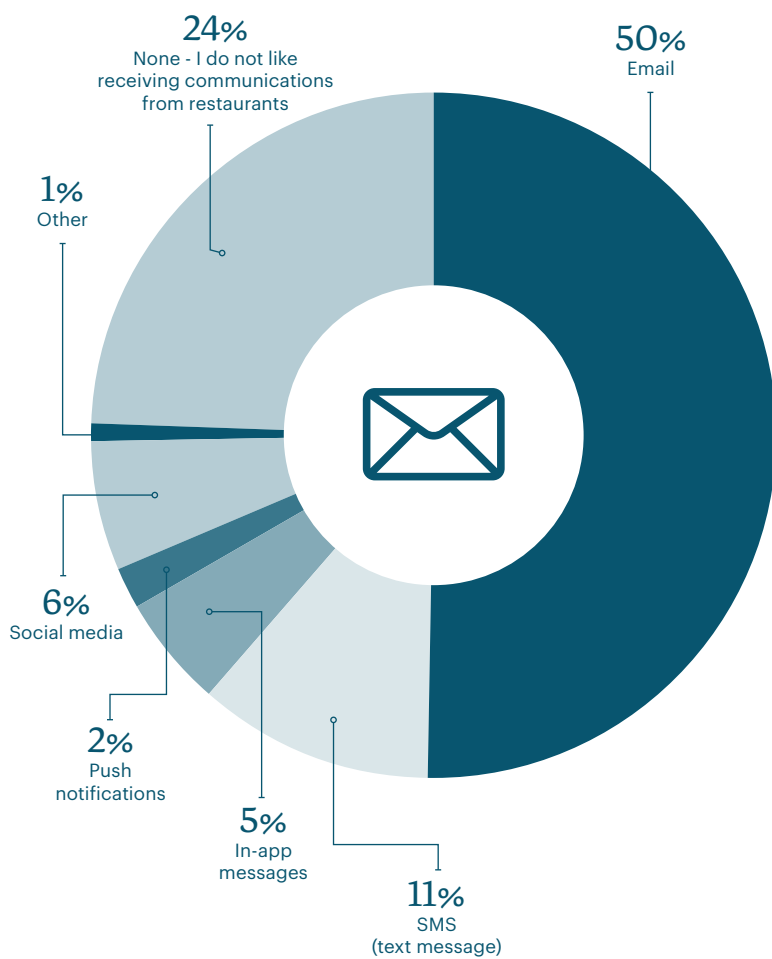
Impact on Deciding to Join Restaurant Loyalty Program



Diners Engage in Their Inboxes

Of course, loyalty programs aren't the only way that diners engage with their favorite restaurants. 50% of diners report that email is their preferred way to stay in touch with restaurants. And while email is the most preferred form of communication across generations, 20% of Gen Z diners in the U.S. and 13% in Canada prefer to hear from restaurants via social media.

Preferred Communication Method (American and Canadian Diners)





Diners Want Emails Kept to a Minimum

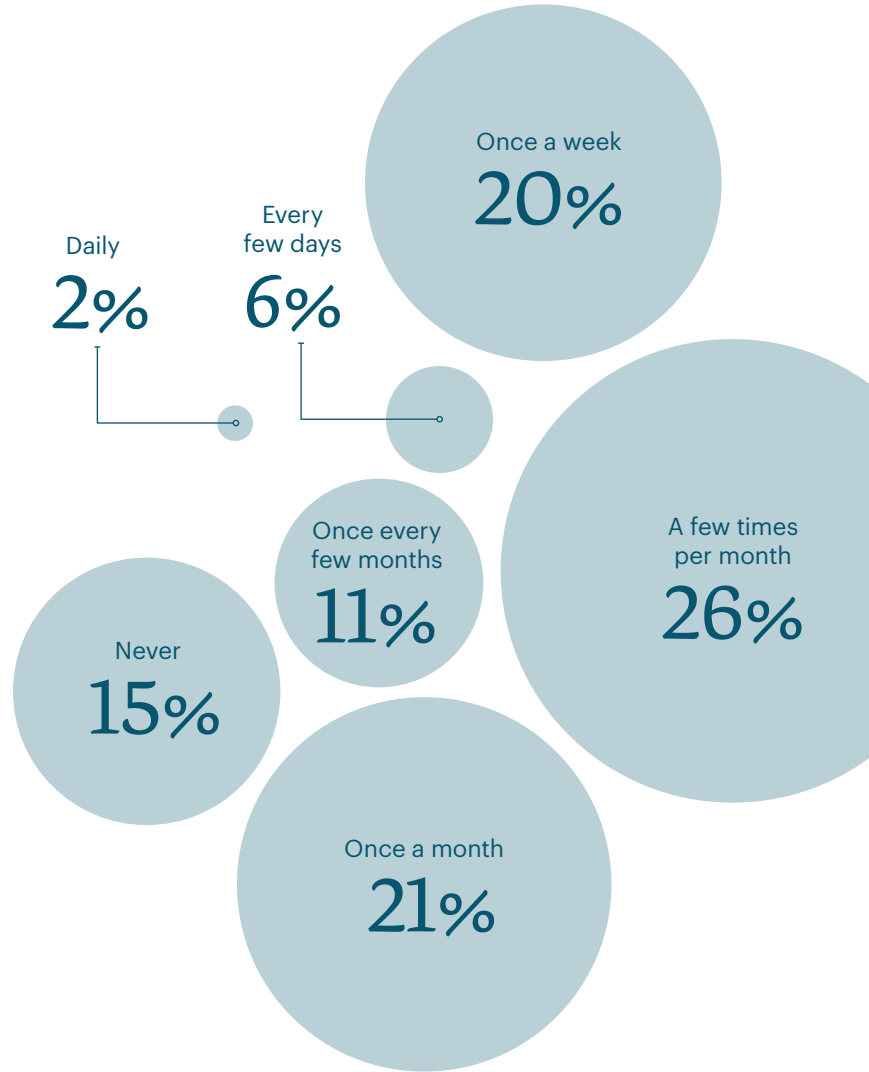
While diners overwhelmingly prefer email to other communication channels, they don't want to see their inboxes flooded. Only one-in-three Americans (32%) and just one-in-five Canadians (21%) want to hear from a restaurant on a weekly basis. In fact, "too frequent emails" was cited as the number one reason why diners will unsubscribe from a restaurant's email list. The sweet spot? About a quarter (26%) of diners said they would like to hear from restaurants a few times per month and 21% said they would like to hear from restaurants just once a month.

Interestingly, Canadian diners appear to be more sensitive to an onslaught of emails with 49% saying it would cause them to unsubscribe (versus just 34% of American diners). Meanwhile, 28% of U.S. diners say irrelevant offers would drive them to unsubscribe, while just 20% of Canadians said the same.

Want to hear via email

Gen Z		
	26%	30%
Millenials	41%	44%
Gen X	57%	52%
Boomers	67%	48%

How Often Diners Want to Receive Emails from Restaurants



"I can't say I read every email that comes in from restaurants. It depends if it's catchy or if it's advertising a special. I think once a week is good [for restaurant emails] because you're already inundated with emails and I certainly don't open them all."

(Female, 45-54, Nova Scotia, Canada)

“If a restaurant specifically sends me notifications about things that they know I've ordered before, then it's tailored to me and I don't mind getting that as often as once a week. Otherwise, I really don't want to hear from them more than I'd say two to three times a month.”

(Female, 45-54, Florida, U.S.)

55%

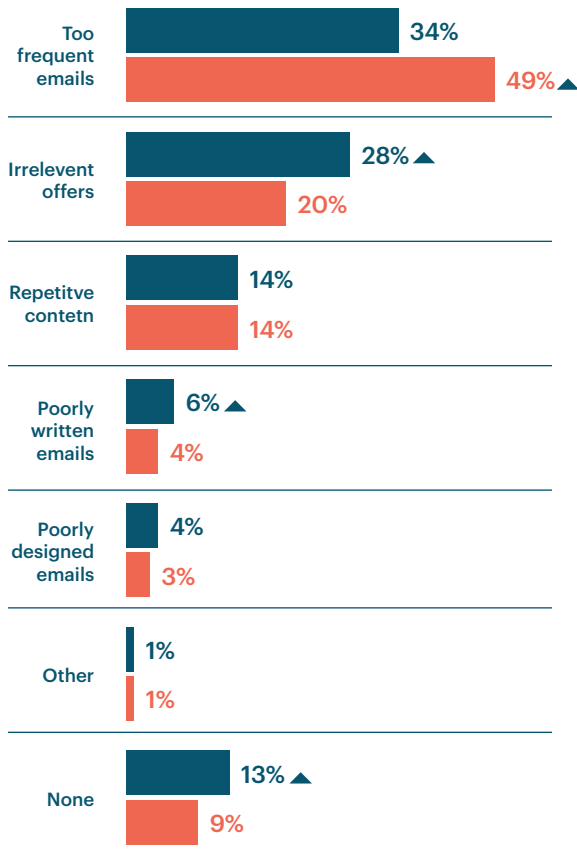
(USA and Canada)

Influenced to open restaurant email for coupons / promotions

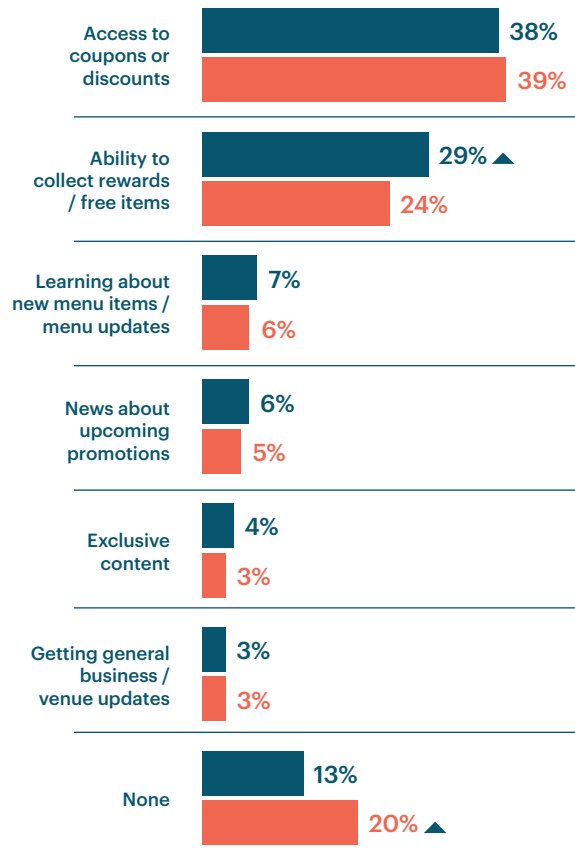
Incentives Also Drive Email Sign-Ups (and Open Rates)

Just as diners love a little reward for signing up for a loyalty program, they are also more likely to subscribe to a restaurant's email list if it provides access to coupons or discounts. Sending emails with coupons and discounts is also the easiest way to get diners to open emails, with more than half (55%) saying this kind of incentive would get them to open an email.

Reasons to Unsubscribe from Restaurant Emails



Influencers to Subscribe to Emails



Diners are Happy with Generic Offers

When it comes to the type of offers diners are hoping to see in their inboxes, it turns out that generic offers are just fine. In fact, only one-third (33%) of diners are looking for personalized offers. And among those who do want personalized offers, 71% are looking for offers based on past order history, while 46% of diners want to see offers based on personal details like their birthdays.

“I think that's the number one way that I choose which restaurant I'm going to order from: Who's giving me the best deal this week?”

(Female, 45-54, Florida, U.S.)

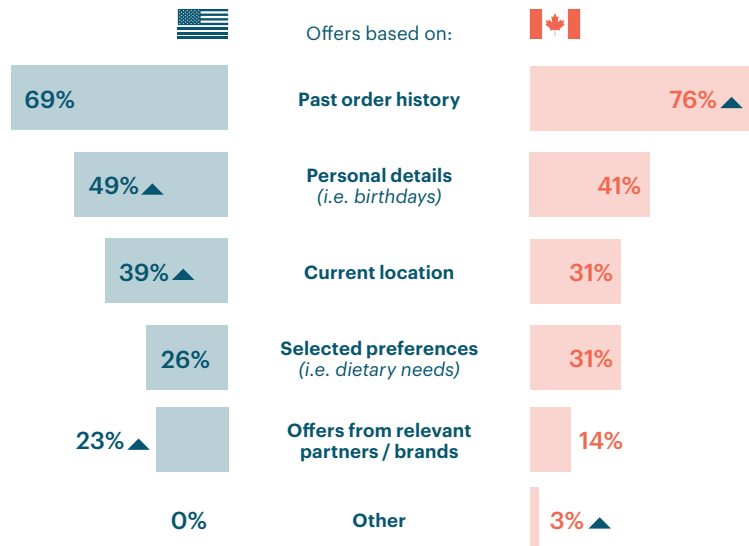
“Send that to me all you want cause it's going to stick in my head. And I'll remember, 'Hey, you know what? We should go to Red Robin because they have buy one get one 50% off this week.'”

(Male, 35-44, Washington, U.S.)

Personalized vs. General Offers



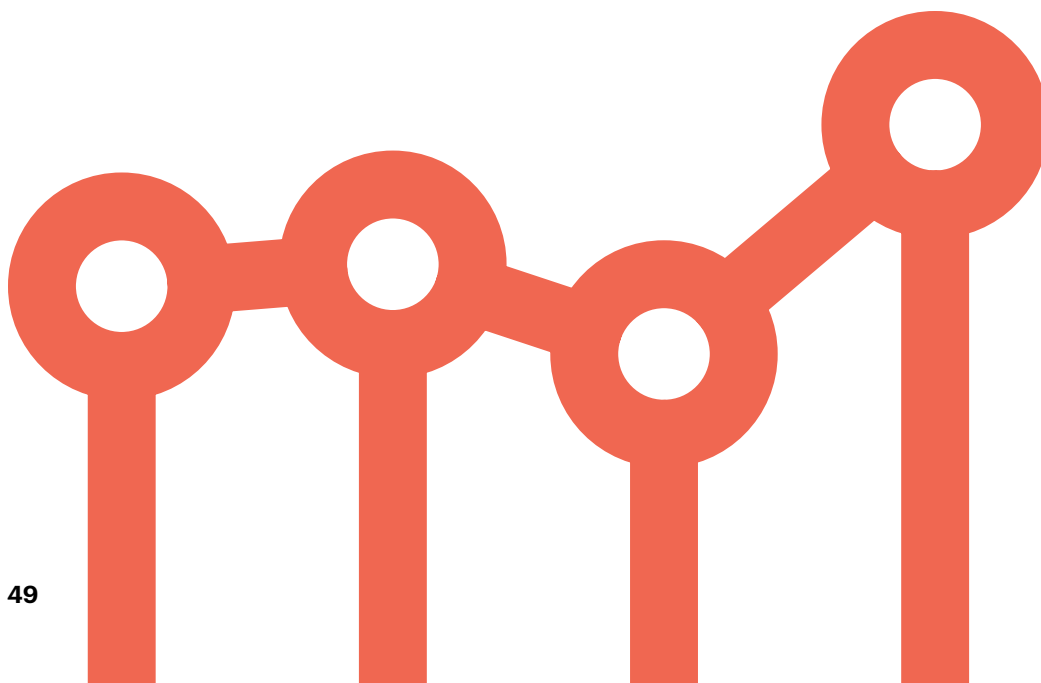
Appealing Personalized Offers



Diner Trends

While there have been some very clear shifts in diner habits and behaviors, other trends are just beginning to take shape. Though some of these insights may seem negligible at first glance, a closer look at the data reveals hidden trends that will be pivotal in the years ahead. For restaurateurs, it's these under-the-radar trends that will be essential for getting ahead of competitors and ensuring long-term success.

Here are four emerging diner trends to keep an eye on and the key takeaways for restaurateurs.



1

Moderate Menu Price Sensitivity

Inflation has skyrocketed across both the U.S. and Canada, making consumers increasingly aware of price increases in all aspects of their lives, including dining out. For some diners, this means menu price hikes could be a major deterrent, with around one-in-five diners (22%) saying that a price increase would *significantly* impact their decision to visit a restaurant.

However, it's also clear that consumers love restaurants and they will generally work hard to ensure that they can fulfill this need. Nearly half of diners – 45% of Americans and 47% of Canadians – say that menu price increases would only *somewhat* impact their decision to visit a restaurant, suggesting that diners are willing to absorb some menu price increases in order to enjoy the food they love.

"We absolutely raised our menu prices – you have to. I think overall, we're looking at probably a 20% increase year over year. But we've also noticed that when people do choose to go out, they are dining out and really making their dollars count."

(Shaun Hanna Chef and Owner, Nightjar Diner Co, Swift Current, Canada)

Takeaway for Restaurants

Adjusting menu prices may be a necessity in this current market and, fortunately, a moderate increase will not deter the majority of diners. However, operators need to be careful to strike the right balance between the quality of their food and the price because consumers are keeping a close eye on rising costs.

"Price plays a little bit of a role. But, I mean, it's not as much about price if the restaurant has what we want."

(Male, 35-44, Washington, U.S.)



2

Hidden Potential of Loyalty Programs

Restaurant loyalty programs have yet to reach mainstream popularity, with just over a third (36%) of American diners and only about a quarter (23%) of Canadian diners reporting that they are currently part of a restaurant loyalty program. However, it would be a mistake to dismiss loyalty programs as a powerful tool for customer retention. A closer look at the data reveals that loyalty programs may be poised for a major surge in popularity, making this an opportune moment for restaurateurs to get a leg up on their competitors.

Younger diners and diners who order takeout/delivery are embracing loyalty programs with open arms. In fact, a whopping 40% of Gen Z and 41% of Millennials diners in the U.S. are already members of a restaurant rewards program, suggesting that younger diners are much more likely to join these programs and expect them to be a part of their everyday dining experience. And among diners who order takeout weekly or more, more than half of American (58%) and Canadian (56%) diners engage with loyalty programs at least once a week.

“I’m using loyalty programs at least weekly. If they’re saying, ‘okay, we have this thing coming out and it’s only going to be here for a limited time,’ as ridiculous as it sounds, I’ll just [be] a sheep and follow the herd. Those kinds of things do motivate me if they have something new coming out that I really want to try.”

(Female, 45-54, Florida, U.S.)

“There are quite a few people who are using our loyalty program. And now that we’re back to where we were, we can focus on that again – we’ll probably get back to pushing that. The difficulty for us has been the pandemic, which required us to constantly adjust. That kind of consumed a lot of our creativity.”

(Wes Bergmann, Owner, Blue Moose Coffee House, British Columbia, Canada)

Takeaway for Restaurants

Loyalty programs are already popular among diners who order takeout and delivery, which means restaurants offering off-premise dining could drive further engagement simply by adding a rewards program. Not to mention, loyalty programs are increasingly popular with younger generations, which means this tool is set to realize its full potential as Gen Z diners begin to gain more spending power. For restaurateurs, adapting to meet the needs of this generation could mean the difference between getting ahead or getting left behind.



3 Demand for Online Ordering Innovations

With pandemic restrictions largely behind them, consumers have returned to dining rooms in droves. But while dine-in is the preferred way to visit restaurants, this does not mean that takeout and delivery are not still a vital sales channel for restaurants.

29% of Americans and 25% of Canadians say they still order takeout and delivery at least once a week or more often, which represents a huge piece of the pie for restaurant sales. Convenience is still the main driver behind off-premise orders, while the biggest deterrent lies with high delivery fees.

Takeaway for Restaurants

Operators should continue to offer takeout and delivery options as a way to diversify their revenue streams and cater to the significant amount of diners still ordering in. Restaurants can also drive further takeout and delivery sales by adding innovations that make the process more convenient, like the option to customize dishes or to pre-schedule pickup and delivery orders, and by absorbing some of the high fees associated with delivery.

“I can't stress this enough with any restaurant, if you're going to build an app or a website where you can order online, customization is key. Not just a burger, but also like the salad with the entree. If it was between that and another similar place that [doesn't offer customization], I would choose the first one every time because I know I could get what I want.”

(Male, 35-44, Washington, U.S.)



4 Online Influencers and Their Growing Influence

When it comes to how most diners choose restaurants, type of food, location, and recommendations from friends/family have the biggest influence. However, a closer look at how Gen Z's dining habits suggests that social media and online influencers may increasingly play a role in restaurant decisions.

28% of Gen Z said that social media influences where they decide to dine, and a whopping 39% of Gen Z diners say that they have tried a new restaurant based solely on the recommendation of an online influencer. And while Instagram appears to be the most influential platform for this generation, TikTok is on the rise. In the U.S. one-in-five (21%) Gen Z diners turn to TikTok before dining out – a number that is only expected to grow.

“Instagram [engagement] was actually something that we were tracking on a week-to-week basis. Like if we were to post our menu features for the day, versus not posting our menu features of the day, we tracked what impact that has on the sales. And we actually do see about a 30% bump in sales every time that we post something on Instagram. So it's definitely something that we continue to push.”

(Shaun Hanna Chef and Owner, Nightjar Diner Co, Swift Current, Canada)

“Sometimes I actually go to a restaurant’s social media, like their Instagram, and then go to their tagged photos and to see people were there and what they had – find out what their experience looked like.”

(Female, 25-34, British Columbia, Canada)

Takeaway for Restaurants

While online influencers won't make or break your restaurant, their growing influence should not be ignored. If restaurant operators want to attract the next generation of diners, they need to cultivate a strong presence on platforms like Instagram and TikTok to make sure they catch the eye of online influencers and the diners that closely follow their recommendations. But don't try to rush the process with paid promotions – diners can smell an inauthentic review immediately!



Conclusion

From a global pandemic to sky-high inflation, diners in the U.S. and Canada have been through a lot in the past few years. And understandably, it's changed both their dining habits and what they expect from restaurants.

But while diners have changed, one fact remains utterly constant: diners love restaurants. They generally prefer dining out and they will work hard to ensure that they can fulfill this desire. Whether that means rearranging their budget so they can afford to dine in or doing a little extra research to find the best spot in the neighborhood, diners are often willing to bend over backwards for the restaurants they love.

For restaurant operators, this means that simply paying a little extra attention to the diner experience and investing in solutions that meet diners' changing needs can go a long way in building customers for life.

“Pre-pandemic there were some places we wouldn't go back to because the service wasn't great or they took us for granted. But I don't find that now – I find everyone's happy to be there. People are just so happy to be back.”

(Female, 45-54, Nova Scotia, Canada)





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TouchBistro was founded in 2010 with one mission: to provide restaurateurs with innovative technology that makes running a restaurant easier. We started with our core product, our point of sale. Now, we offer an all-in-one restaurant management system that includes payment processing, online ordering, reservations, and more.

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