

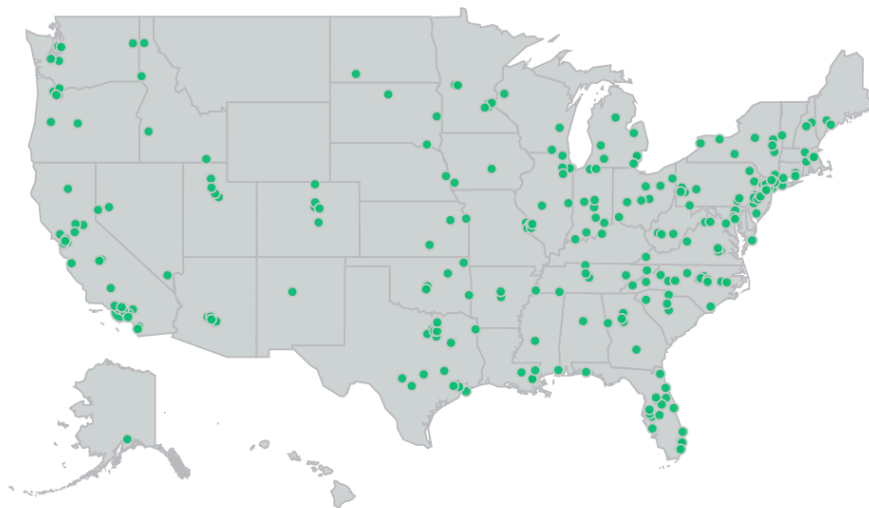


Everyday Dining Forecast

~~~~~ *Fall 2021 Quarterly Consumer Insights Report*

# About This Report

- Online survey powered by momentive
  - Formerly known as Survey Monkey
- Survey was fielded and completed in August of 2021
- 295 active U.S. diners
- 58% female, 42% male
- \$50k-\$200K+ HHI • Ages 18-60+



# Back to \_\_\_\_\_ ?

The return of Fall means back to school for many, but the prospect of life returning back to “normal” seems as distant as ever as concerns over the delta variant continue to rise.

Millions of Americans made up for lost time dining out during the Summer months, but attitudes seem to have now shifted again as parents are faced with more variables when deciding whether to dine out or eat at home.

Back to school time traditionally brings more meal prepping, homemade comfort foods, and at-home family dinners. Unfortunately, it also brings busier weekly schedules for parents who already feel there's not enough hours in the day.



# Three (3) Primary Themes in This Report



## Dining Out

How often do Americans plan to dine out this Fall and why (or why not)?



## COVID Concerns

How the lingering effects of the pandemic are still affecting dining decisions.



## Eating at Home

When do most tend to eat at home and what are the key factors?



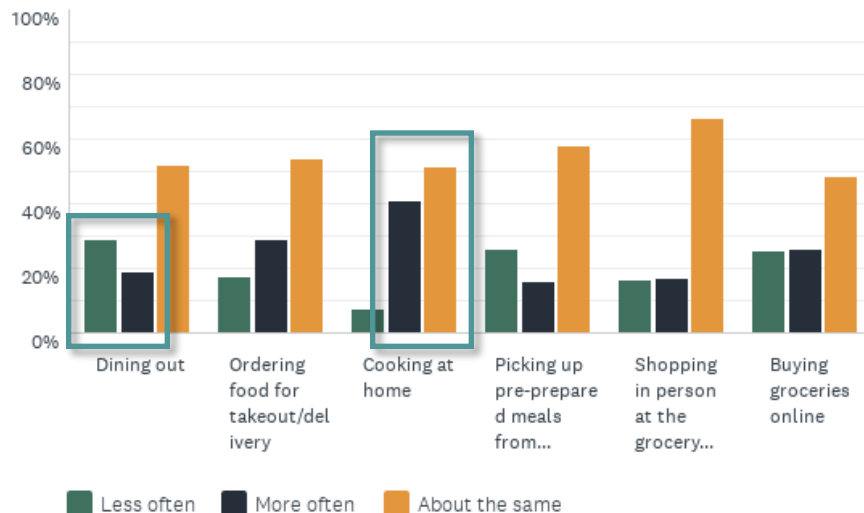
## Dining Out

How often do Americans plan to dine out this Fall and why (or why not)?



# Should We Stay or Should We Go?

*Q. This fall, do you expect to do the following food-related activities more often, less often, or about the same as you did the previous three months?*



## Key Insights:

- **92%** of respondents expect to cook at home either “more often” or “about the same” as they did in the Summer.
- When asked about dining out, only **18%** plan to dine out “more often” this Fall compared to **43%** back in the Summer, while nearly a third (**29%**) plan to dine out “less often” this Fall.

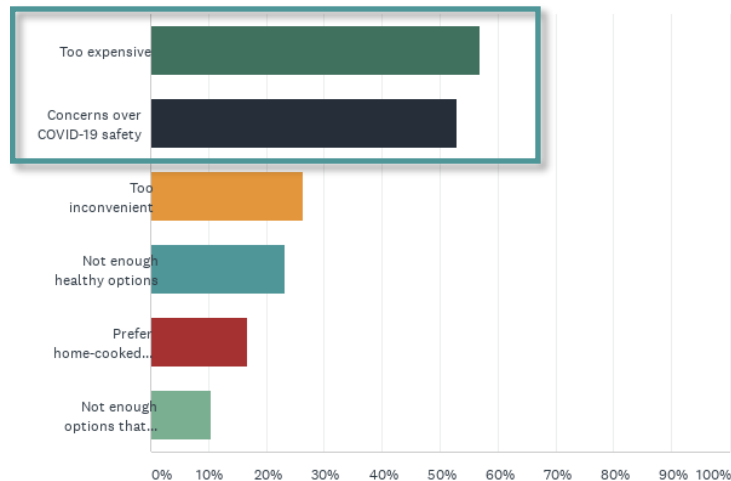


# How Often & Why Not?



Almost half (**46%**) of respondents will likely dine out “*less than once a week*” this Fall, up from **30%** this past Summer.

Q. What factors will most **PREVENT** you from dining out?



The **costs of eating out** and **lingering safety concerns due to the pandemic** continue to be the two primary factors preventing respondents from dining out.







## COVID Concerns

How the lingering effects  
of the pandemic are still  
affecting dining decisions.





# Not Out of the Woods Yet



Almost half (**44%**) of respondents are “*more concerned*” now about COVID-19 and the delta variant than they were this past Summer.



In fact, **38%** said they plan to “*dine out less often*” this Fall because of safety concerns related to the ongoing pandemic.

## Key Insights:

- The rise of breakthrough infections and unvaccinated children now returning to school are causing some to re-evaluate their stance on eating out.
- Even still, overall sentiment is far better than it was before vaccines were readily available.





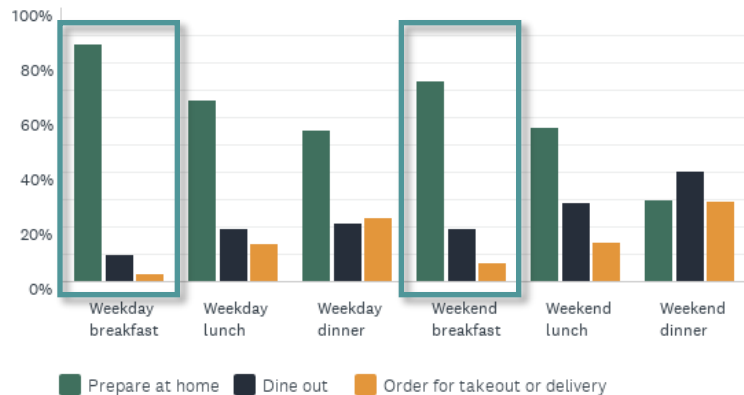
## Eating at Home

When do most tend to eat at home and what are the key factors?



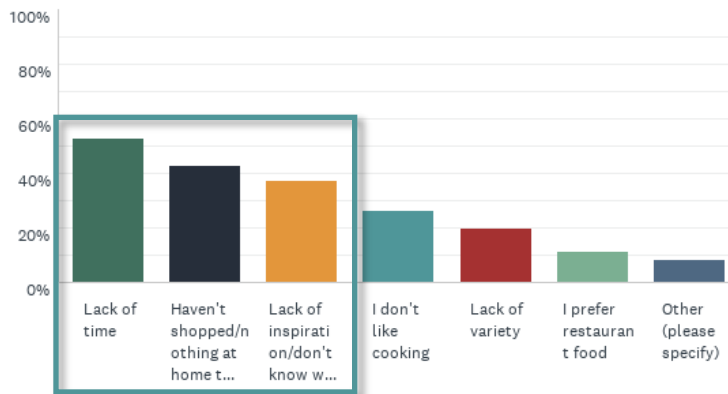
# Not Enough Hours in the Day

*Q. When are you most likely to prepare food at home, dine out, or order food for takeout/delivery?*



**Breakfast** is the meal respondents plan to prepare most at home this Fall, while mostly limiting dining out for weekend lunch & dinner.

*Q. What factors most PREVENT you from preparing meals at home?*



**Busy Fall schedules** and **lack of inspiration** dominate the factors that will prevent respondents from preparing more meals at home this Fall.

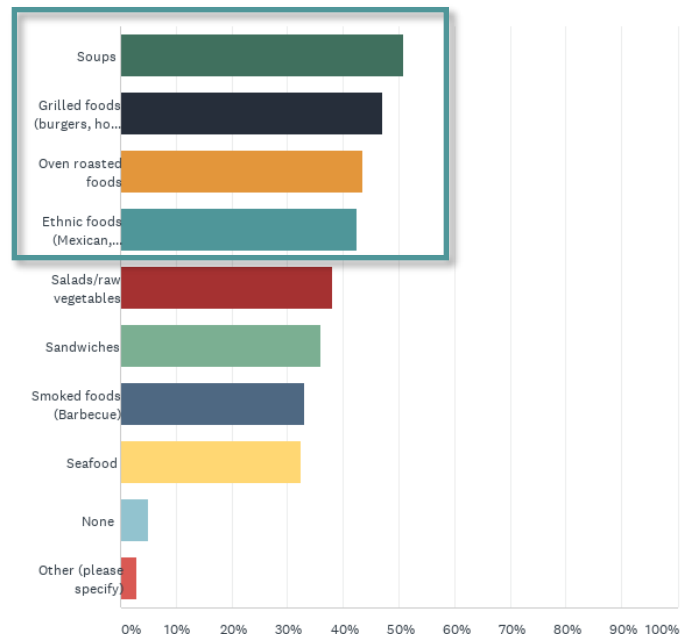


# Cooler Weather Brings Comfort Food



**51%** of respondents tend to eat more Soups during the Fall, while oven roasted foods and ethnic favorites remain popular as the weather cools.

*Q. Pick the foods that you tend to eat more of during the Fall.*



# Key Takeaways

1. Back to school time typically means eating out less for most families. Or at least, limiting it to the weekends. But the costs of eating out, and lingering safety concerns due to the pandemic, are giving potential restaurant goers even more pause than usual this Fall.
2. The COVID situation is still very much fluid and restaurant brands' marketing strategies should be as well. Focusing on creative, promotional incentives to entice dining-in or taking-out (while staying safe) will better serve brands vs. trying to win-back day parts that just don't seem feasible given everyone's hectic schedules.
3. While consumers do prefer to eat at home more frequently compared to the Summer, their pantries might be as empty as their mealtime ideas. This presents real opportunity for grocery brands to inspire increased product usage through creative recipe "hacks" to drive brand loyalty.



# Thank You!

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