



Project Co-Lab

Eat-out Behavior During and After the Pandemic

November 2021

Report Outline

- Research Design
- Key Findings



Research Design



Type of Study

Eat-Out Behavior Study



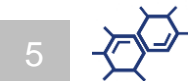
Methodology

Computer-Assisted Web Interview (CAWI)



Location

Metro Manila
Metro Cebu
Metro Davao



Quota Sampling

Gender and Age profile is based on PSA;
SEC profile is based on SCMI's Media
Insights study



Respondents

Male/Female, age 13-59 yo

Must be from ABCD Homes

Must have bought and consumed food or drinks from eating-out places in the P3M
PDM (not necessarily actual purchaser) of food and/or drinks for self and/or family



Sample Size

n=200 per city
(MOE +/- 10%)



Survey Period

Oct 22 – Nov 11, 2021

Report Outline

- Research Design
- Key Findings





FOOD TRENDS IN 2021

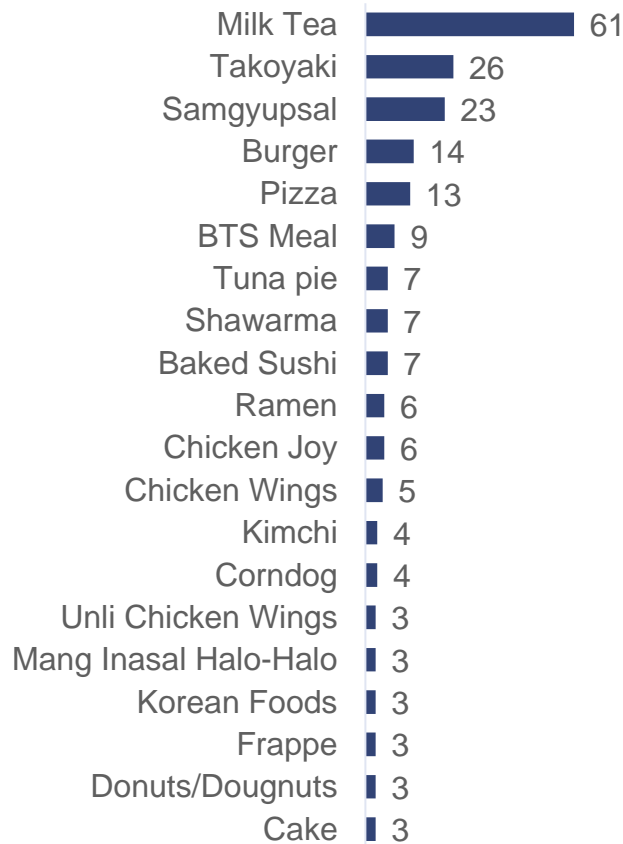
Summary:

- Food products that consumers deemed new are strictly not new anymore in the eat-out market. **Milk Tea** tops the spot.
- **Takoyaki** and **BTS Meal** are also products that gained traction in 2021.
- These new products did not only generate high awareness but also enjoy **high trial**.
- Digital channels such as **Facebook** and **YouTube**, along with **TV**, drive awareness for these new products.

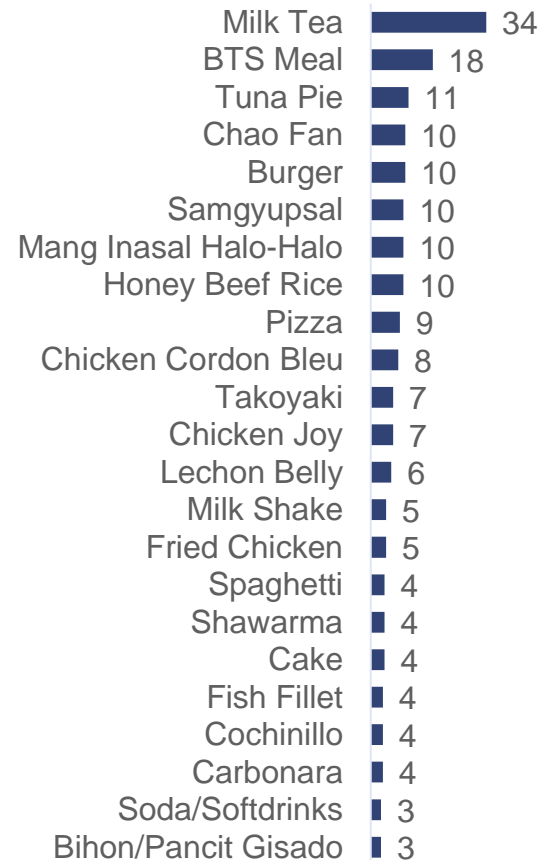
Many of the products that trended over the past year are not strictly new.

Awareness of New/Trending Products from Eat-Out Places

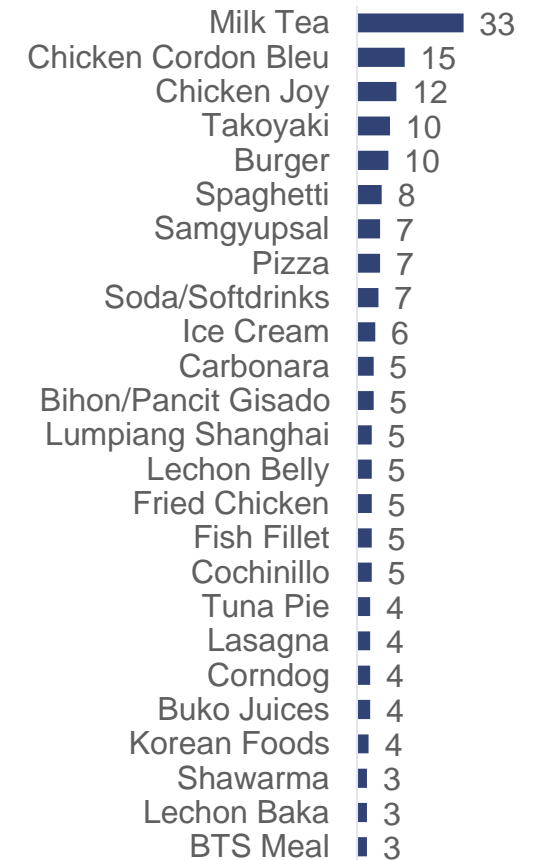
Metro Manila



Metro Cebu



Metro Davao



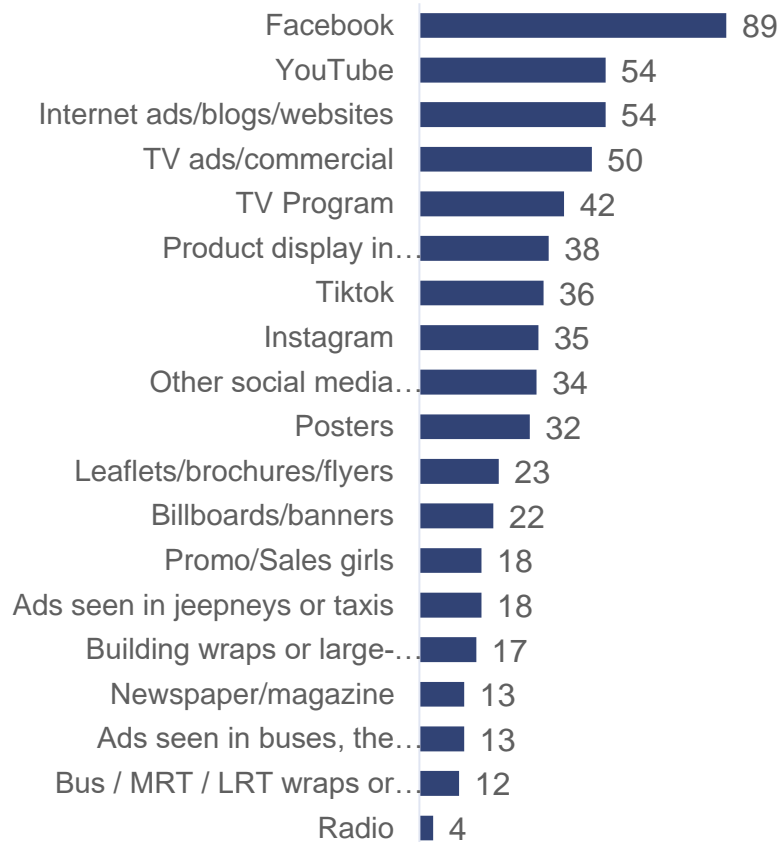
Base: n=200 (unweighted) Metro Manila
n=200 (unweighted) Metro Cebu
n=200 (unweighted) Metro Davao

*Only products mentioned by 3% or more shown

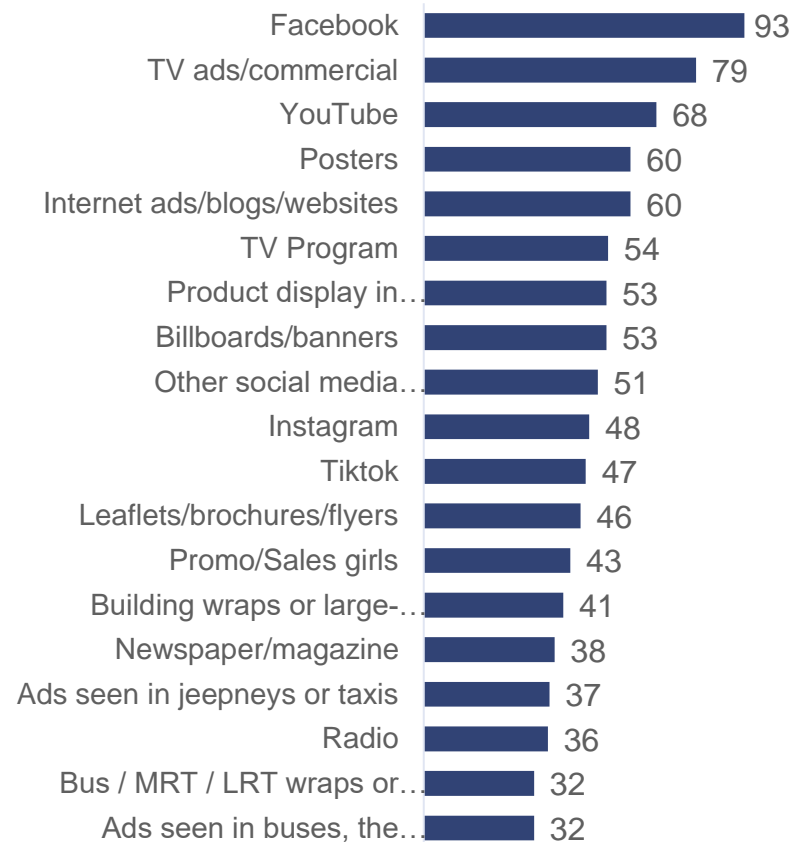
But for one reason or another, they are seemingly hot topics on Facebook and YouTube. TV also helps drive awareness in Metro Cebu and Metro Davao

Source of Awareness Regardless of New Products

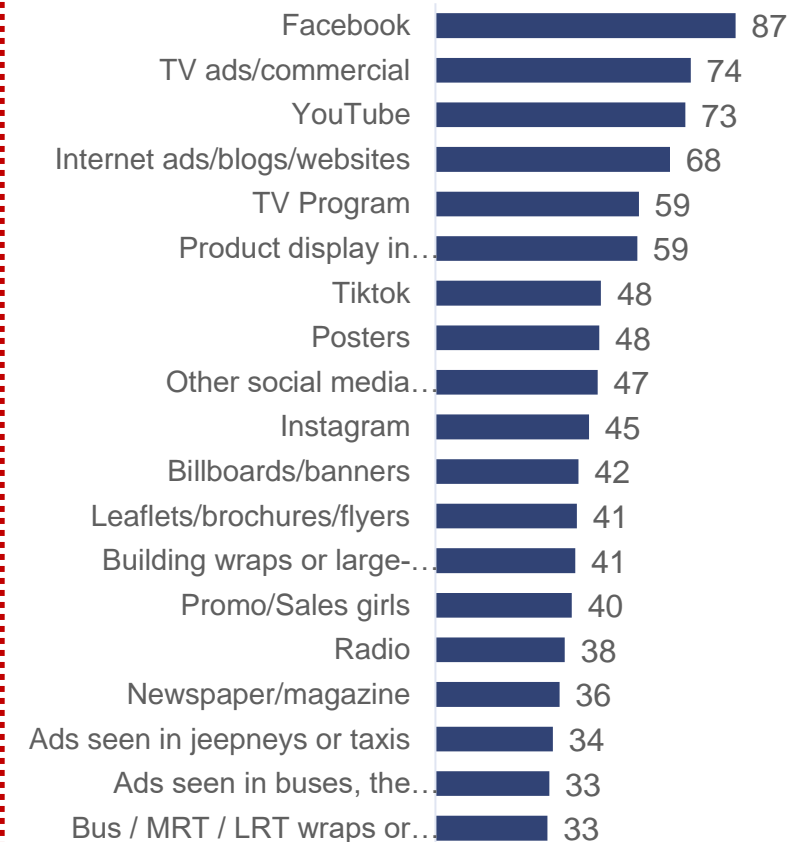
Metro Manila



Metro Cebu



Metro Davao



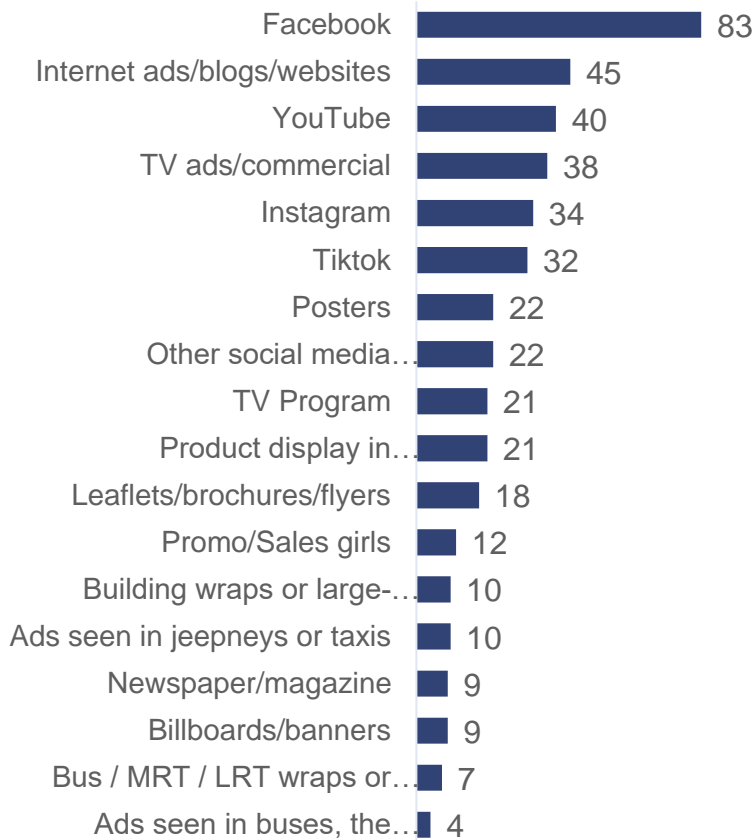
Base: n=200 (unweighted) Metro Manila
n=200 (unweighted) Metro Cebu
n=200 (unweighted) Metro Davao

*Only sources mentioned by 3% or more shown

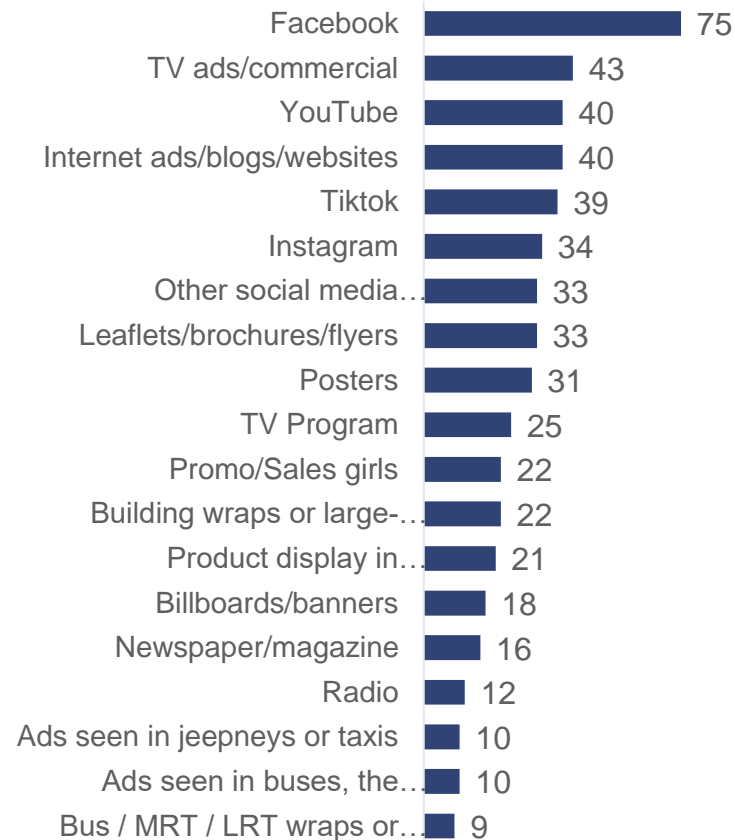
For milk tea in particular, Facebook is largely responsible for its trending.

Source of Awareness Regardless of Milk Tea

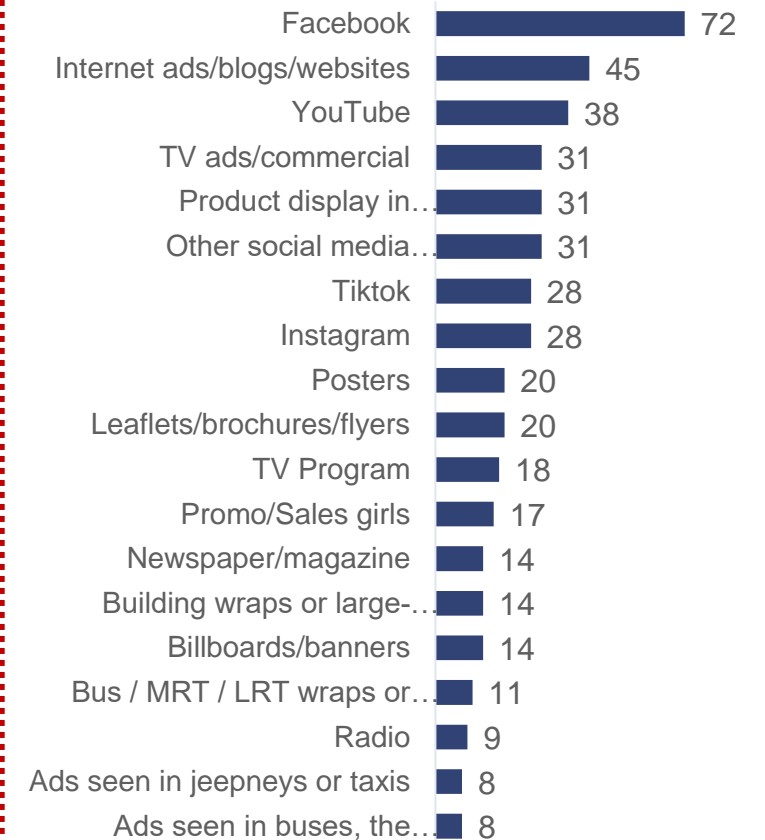
Metro Manila



Metro Cebu



Metro Davao



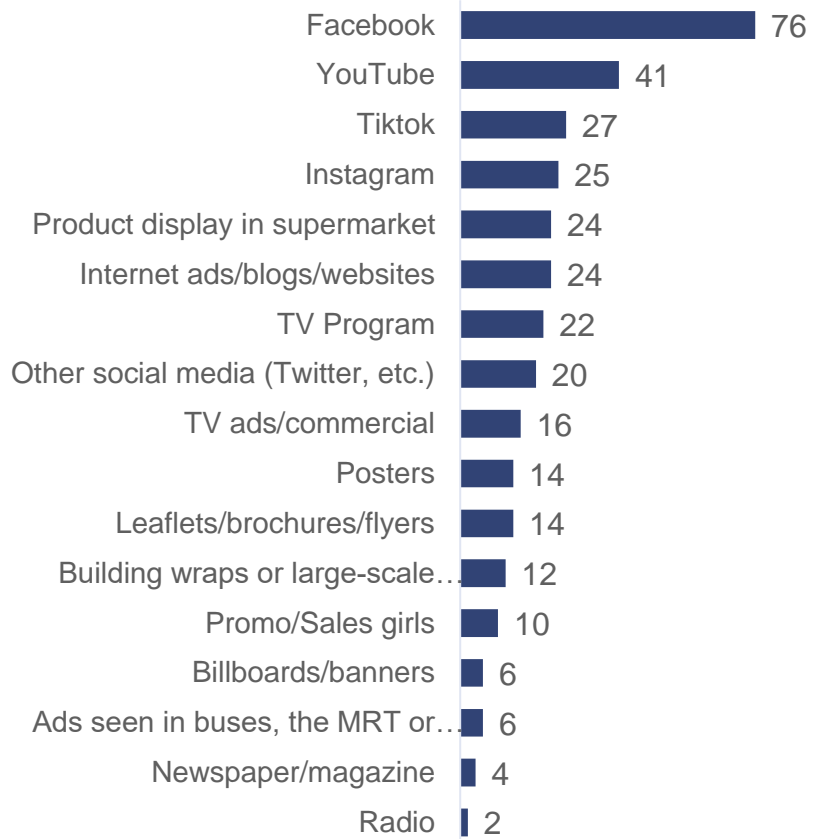
Base: n=200 (unweighted) Metro Manila
n=200 (unweighted) Metro Cebu
n=200 (unweighted) Metro Davao

*Only sources mentioned by 3% or more shown

Takoyaki and Samgyupsal appear to garner attention on Tiktok in addition to Facebook and YouTube.

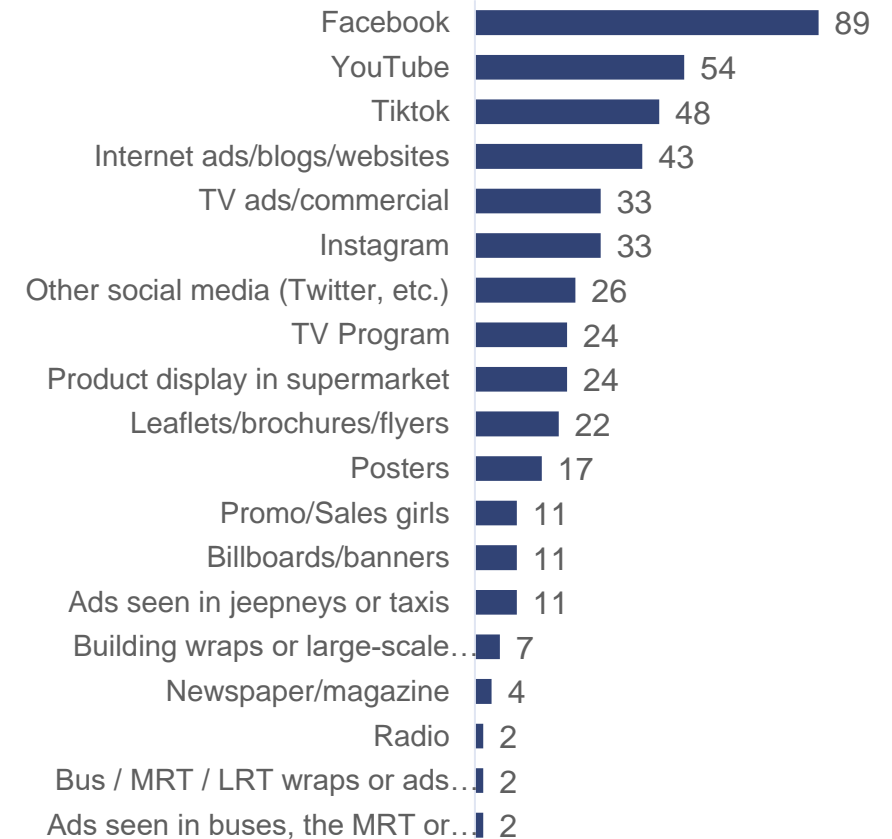
Source of Awareness of Takoyaki

Metro Manila



Source of Awareness of Samgyupsal

Metro Manila



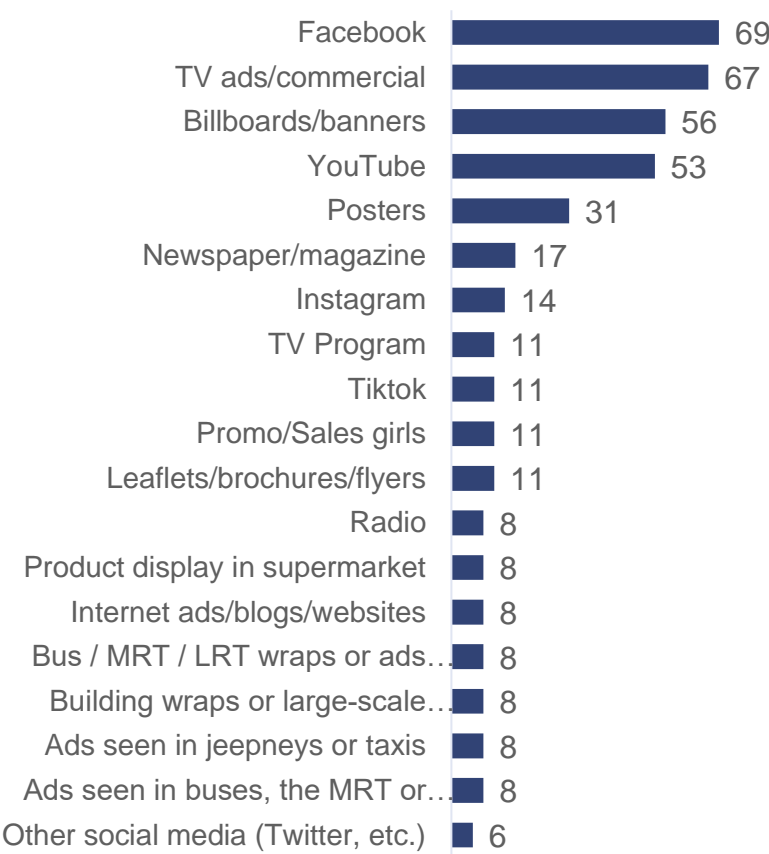
Base: Takoyaki n=51 (unweighted)
Samgyupsal n=46 (unweighted)

*Only sources mentioned by 3% or more shown

Social media, TV and outdoor ads join forces to build awareness for BTS Meal.

Source of Awareness of BTS Meal

Metro Cebu

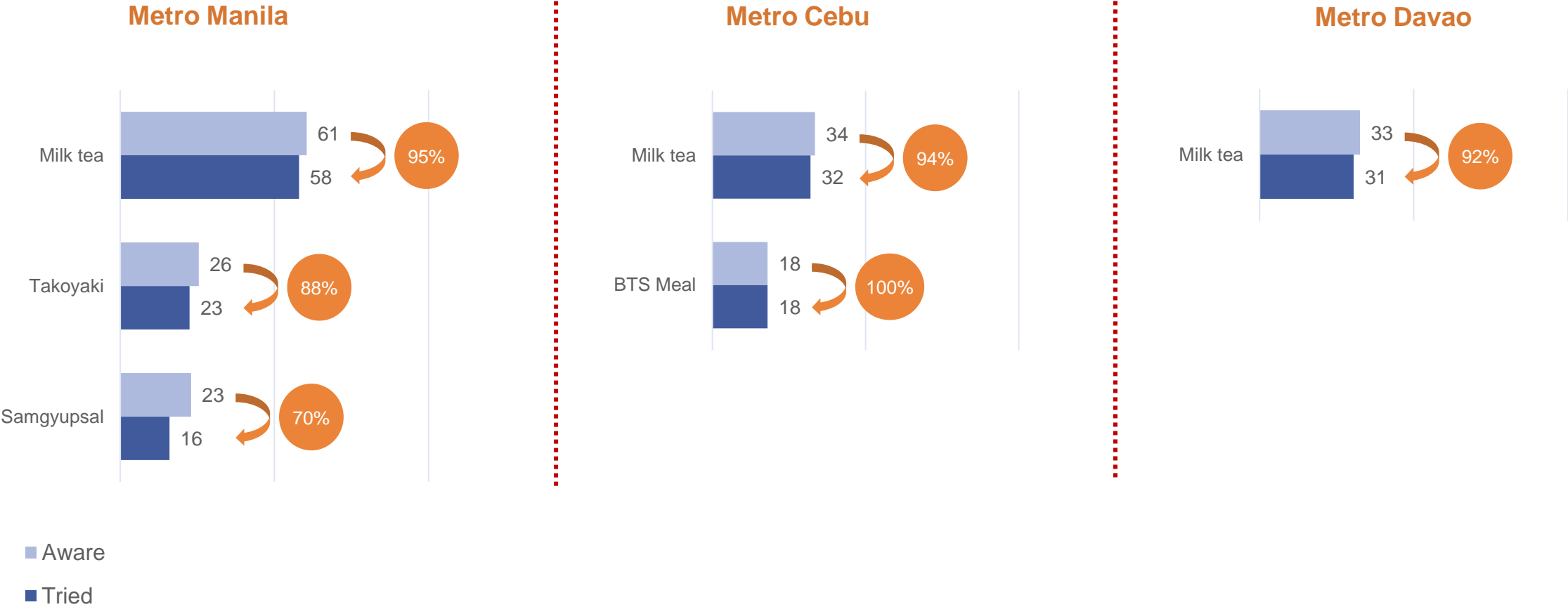


Base: n=36 (unweighted) Metro Cebu

*Only sources mentioned by 3% or more shown

Either conversion is high, or consumers only tend to recall products they have tried.

Trial for New Products





EAT-OUT CONSIDERATIONS

Summary:

- In deciding where to eat, **Brand** is the most important consideration for eat-out consumers in Metro Manila. **Budget** as well as **how food will be bought or eaten** succeeds brand.
- In Cebu and Davao, however, **Budget** takes precedence. **Quality of food** is also as important as Budget for the Davaoenos.
- Of the eat-out brands, QSR brands such as **Jollibee** and **McDonald's** dominates patronage.
- **Affordability, being a favorite of family and kids**, and to some extent, **being easy to go** drive frequent patronage to Jollibee and McDonald's.
- Being kids' favorites, **kids** appear to be the key influencer to these QSR brands.

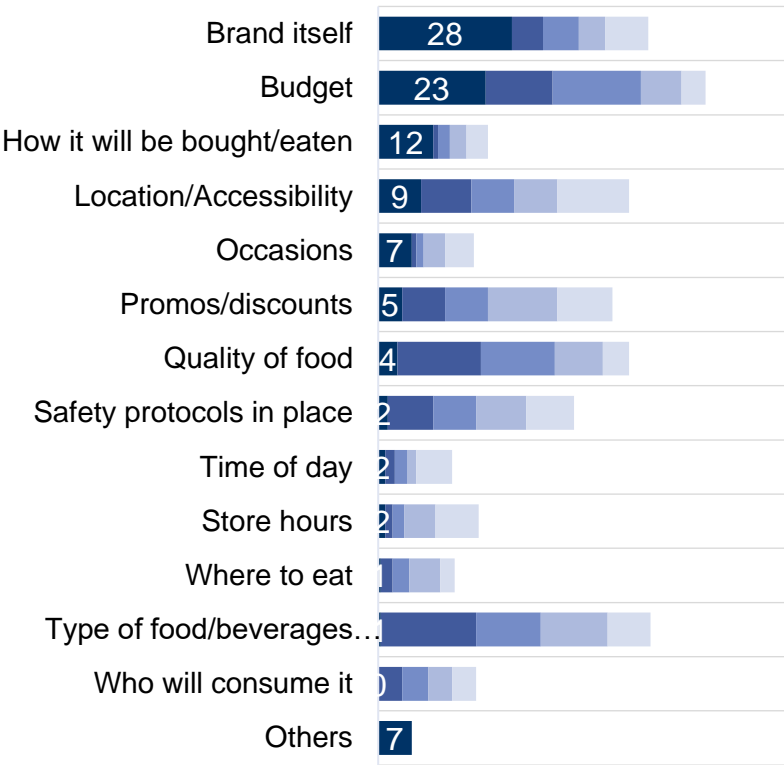
Defining the Considerations

List of Considerations	Definitions
Brand Itself	Considers a specific eat-out brand
Budget	Considers the available money to spend
Where to eat	Considers whether to eat at home, in an eat-out place or somewhere else.
How it will be bought / eaten	Considers whether to buy it through dine-in, take-out, drive thru or delivery
Who will consume it	Considers who will consume the food items
Type of food / beverages served	Considers the type of food or beverages they want to eat.
Location / Accessibility	Considers where the eat-out place is located.
Quality of Food	Considers the quality of food served.
Safety Protocols in place	Considers the safety protocols that are set in place
Promos / Discounts	Considers any promos, discounts or rewards offered
Store Hours	Considers if it is open early morning, after dinner, or 24 hours
Time of day	Considers where it will be consumed for breakfast, lunch, dinner.
Occasions	Considers the occasions for buying food.

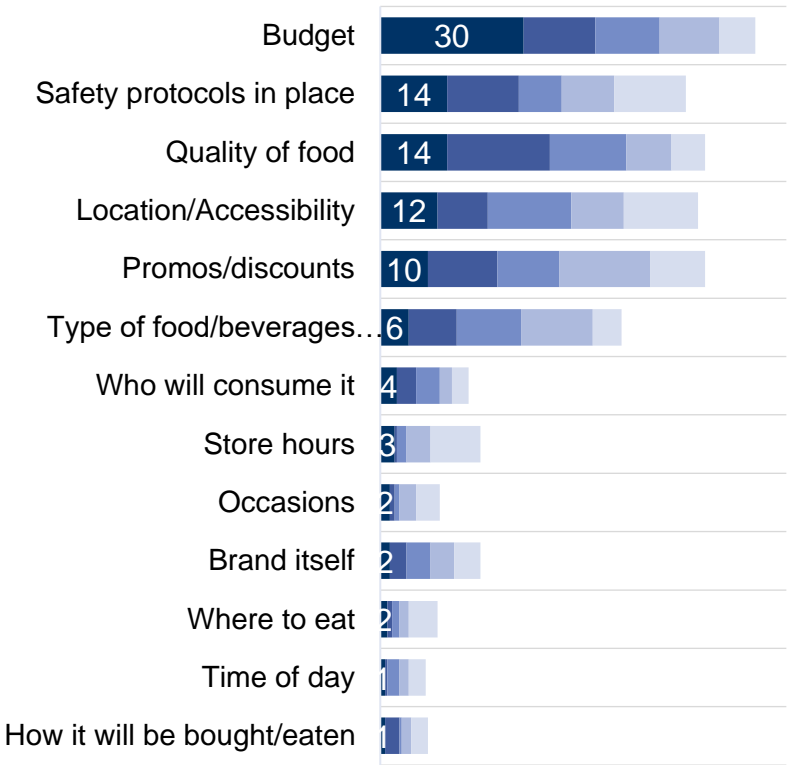
Brand outweighs most considerations among MMA consumers. In Cebu, budget takes precedence; in Davao, budget, quality of food, location and safety protocols are almost all equally important.

What comes first when deciding where to eat?

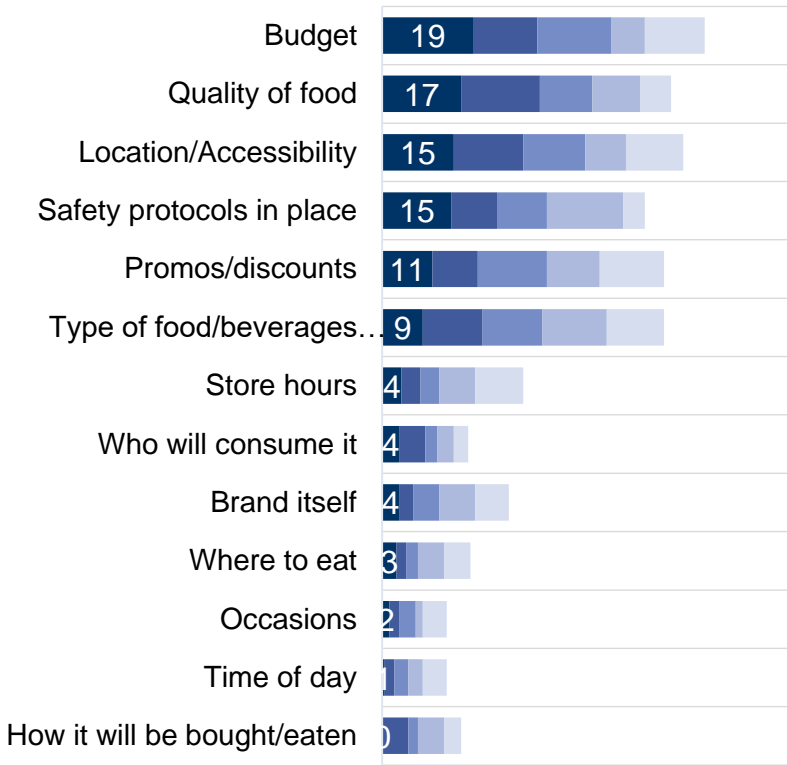
Metro Manila



Metro Cebu



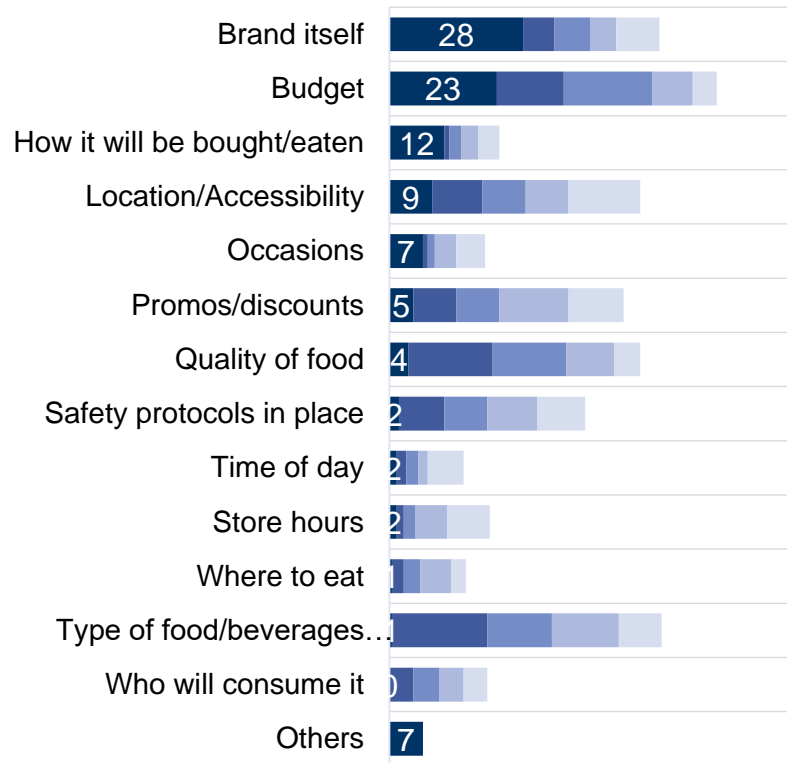
Metro Davao



Brand as the top consideration cuts across segments in Metro Manila.

What comes first when deciding where to eat?

Total Metro Manila



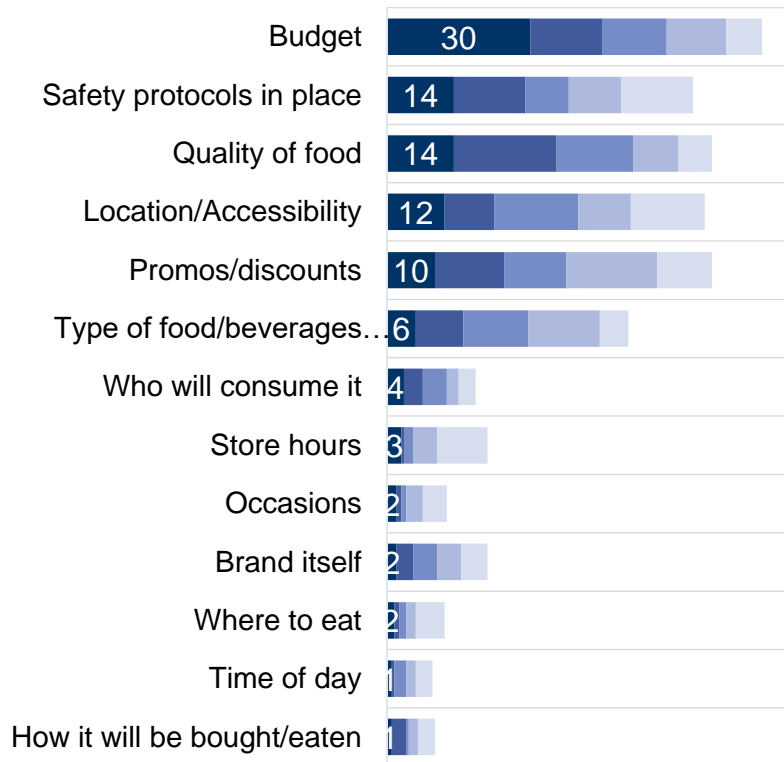
ABC	D	Male	Female	13-20yo	21-30yo	31-40yo	41-50yo
n=67	n=133	n=99	n=101	n=38	n=61	n=57	n=44
25	29	26	30	24	28	30	30
21	23	19	26	24	18	25	25
9	13	12	11	16	13	5	14
9	9	11	7	5	8	9	14
12	5	8	6	8	7	4	11
7	4	5	5	3	8	7	0
1	5	4	4	5	5	5	0
1	2	1	3	0	2	2	5
3	1	3	0	3	2	0	2
4	0	1	2	3	2	2	0
0	1	0	1	0	0	2	0
0	1	1	0	0	2	0	0
0	0	0	0	0	0	0	0

Rank 1 Rank 2 Rank 3 Rank 4 Rank 5

The same is true of budget in Metro Cebu.

What comes first when deciding where to eat?

Total Metro Cebu



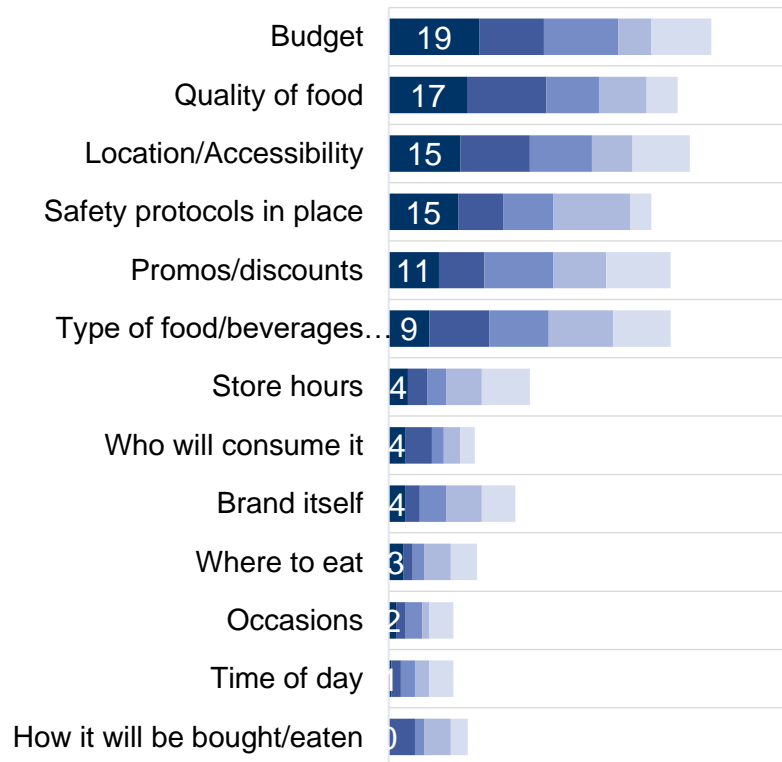
ABC	D	Male	Female	13-20yo	21-30yo	31-40yo	41-50yo
n=38	n=162	n=100	n=100	n=45	n=63	n=51	n=41
21	32	29	31	33	37	24	24
16	14	19	9	13	11	18	15
16	14	15	13	16	10	18	15
18	10	13	11	13	6	14	17
13	9	7	13	9	8	14	10
0	7	7	5	2	11	6	2
3	4	4	3	0	2	4	10
3	3	1	5	2	5	2	2
0	2	1	3	4	3	0	0
5	1	1	3	4	2	0	2
0	2	1	2	2	3	0	0
3	1	1	1	0	2	2	0
3	1	1	1	0	2	0	2

Rank 1 Rank 2 Rank 3 Rank 4 Rank 5

Among certain segments in Davao City (e.g., ABC, males, 13-20, 41-50), promos/discounts are a key consideration as well.

What comes first when deciding where to eat?

Total Davao City



ABC	D	Male	Female	13-20yo	21-30yo	31-40yo	41-50yo
n=30	n=170	n=104	n=96	n=43	n=64	n=43	n=50
7	21	14	24	16	23	19	16
13	17	13	21	14	20	12	18
13	15	16	14	21	16	14	10
17	14	16	13	16	16	9	16
20	9	14	6	16	3	9	16
13	8	7	10	2	8	16	8
10	3	5	3	0	5	7	4
0	3	3	4	5	2	0	8
7	4	4	3	2	2	9	2
0	4	4	2	2	6	0	2
0	2	3	0	5	0	2	0
0	1	1	0	0	0	2	0
0	0	0	0	0	0	0	0

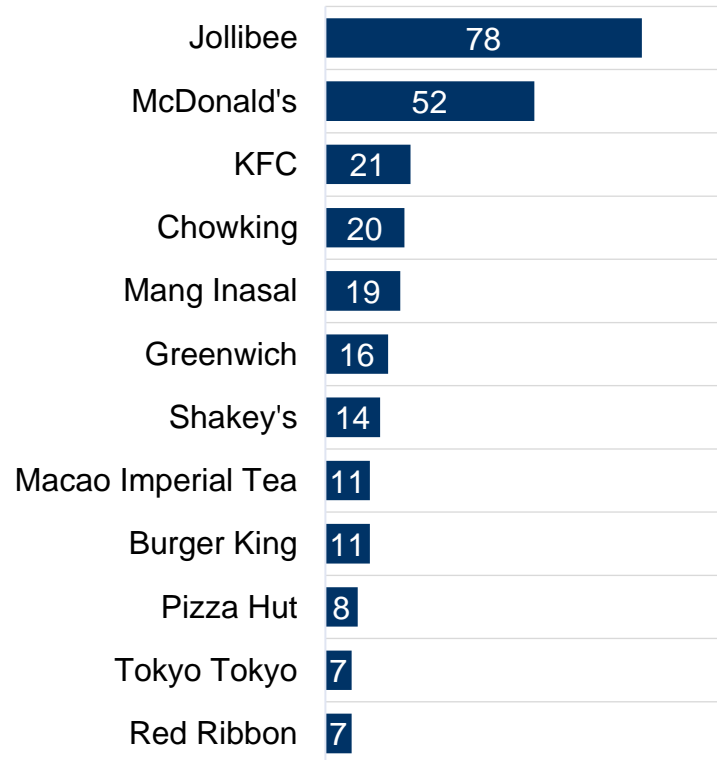
Rank 1 Rank 2 Rank 3 Rank 4 Rank 5

QSR brands dominate P3M patronage...

Top 12 Brands Bought in P3M

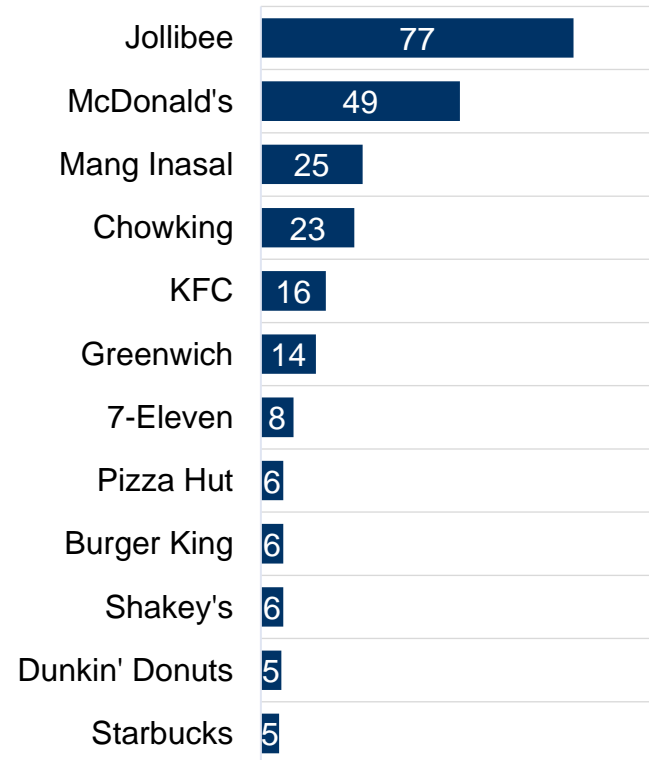
Metro Manila

P3M Purchase



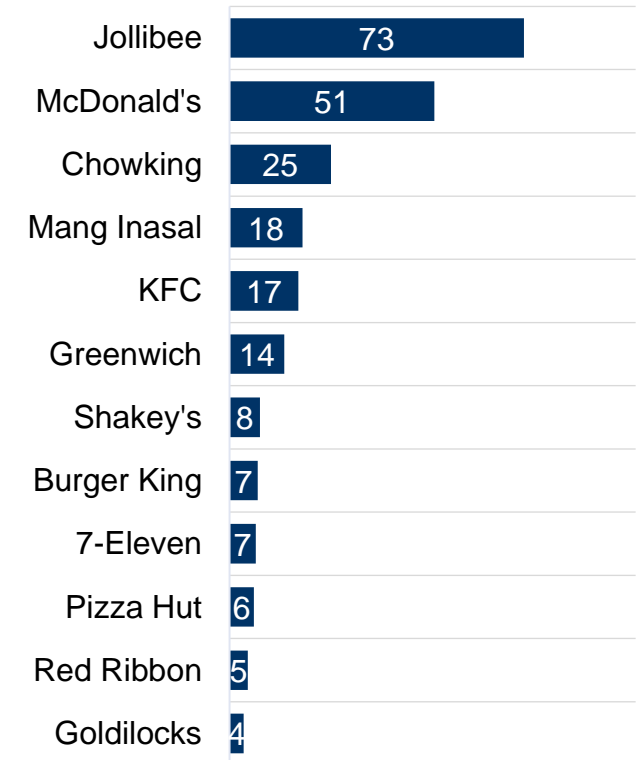
Metro Cebu

P3M Purchase



Metro Davao

P3M Purchase



Base: n=200 (unweighted) Metro Manila
n=200 (unweighted) Metro Cebu
n=200 (unweighted) Metro Davao

...as well as BUMO.

Is it same as their BUMO?

Metro Manila

P3M Rank		BUMO
1	Jollibee	56
2	McDonald's	17
7	Shakey's	3
8	Macao Imperial Tea	2
13	7-Eleven	2
6	Greenwich	2
55	Papa John's Pizza	1
12	Tokyo Tokyo	1
3	KFC	1
5	Mang Inasal	1
4	Chowking	1
20	CoCo	1

Metro Cebu

P3M Rank		BUMO
1	Jollibee	51
2	McDonald's	17
4	Chowking	6
3	Mang Inasal	5
5	KFC	2
11	Dunkin' Donuts	2
7	7-Eleven	2
6	Greenwich	2
16	Max's Restaurant	1
46	Korean Restaurant	1
8	Shakey's	1
32	I Love Milktea	1

Metro Davao

P3M Rank		BUMO
1	Jollibee	44
2	McDonald's	18
3	Chowking	9
4	Mang Inasal	6
5	KFC	4
6	Greenwich	3
9	7-Eleven	3
8	Burger King	2
43	Turks	1
13	Macao Imperial Tea	1
16	Bonchon	1
21	CoCo	1

Frequency of patronage averages at 2x a month, at least for the top QSR brands

Frequency of Purchase from BUMO (Past 3 Months)

Metro Manila

P3M Rank		BUMO	Freq.
1	Jollibee	56	6.3
2	McDonald's	17	7.0
7	Shakey's	3	
8	Macao Imperial Tea	2	
13	7-Eleven	2	
6	Greenwich	2	
55	Papa John's Pizza	1	
12	Tokyo Tokyo	1	
3	KFC	1	
5	Mang Inasal	1	
4	Chowking	1	
20	CoCo	1	

Metro Cebu

P3M Rank		BUMO	Freq.
1	Jollibee	51	5.5
2	McDonald's	17	6.1
4	Chowking	6	
3	Mang Inasal	5	
5	KFC	2	
11	Dunkin' Donuts	2	
7	7-Eleven	2	
6	Greenwich	2	
16	Max's Restaurant	1	
46	Korean Restaurant	1	
8	Shakey's	1	
32	I Love Milktea	1	

Metro Davao

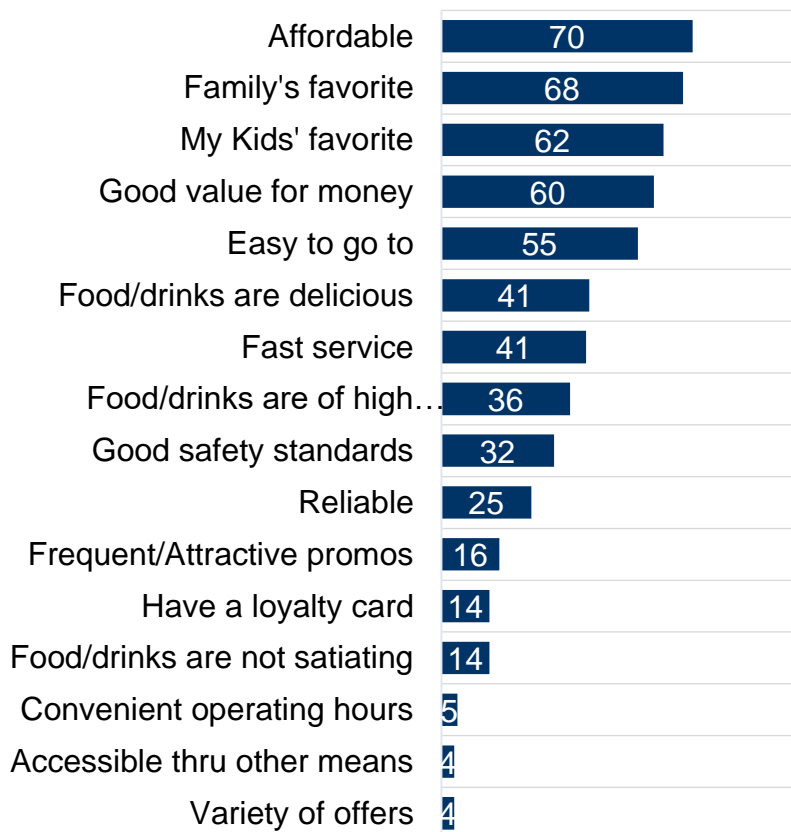
P3M Rank		BUMO	Freq.
1	Jollibee	44	6.3
2	McDonald's	18	5.7
3	Chowking	9	
4	Mang Inasal	6	
5	KFC	4	
6	Greenwich	3	
9	7-Eleven	3	
8	Burger King	2	
43	Turks	1	
13	Macao Imperial Tea	1	
16	Bonchon	1	
21	CoCo	1	



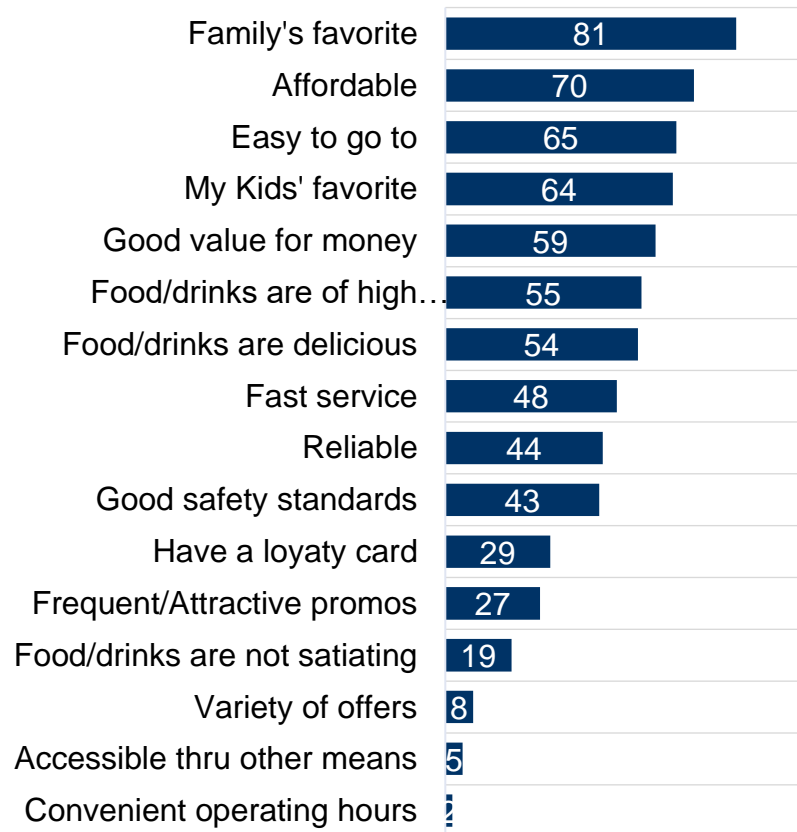
Affordability and being a favorite of their family and kids are reasons for frequent patronage to Jollibee.

Reasons for Buying from Jollibee Most Often

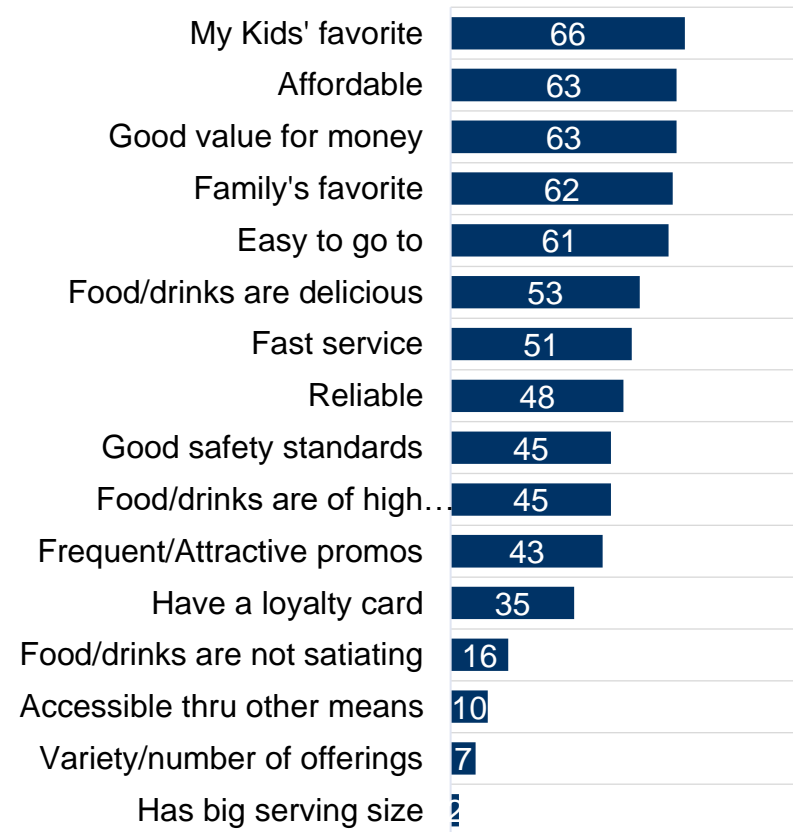
Metro Manila



Metro Cebu



Metro Davao



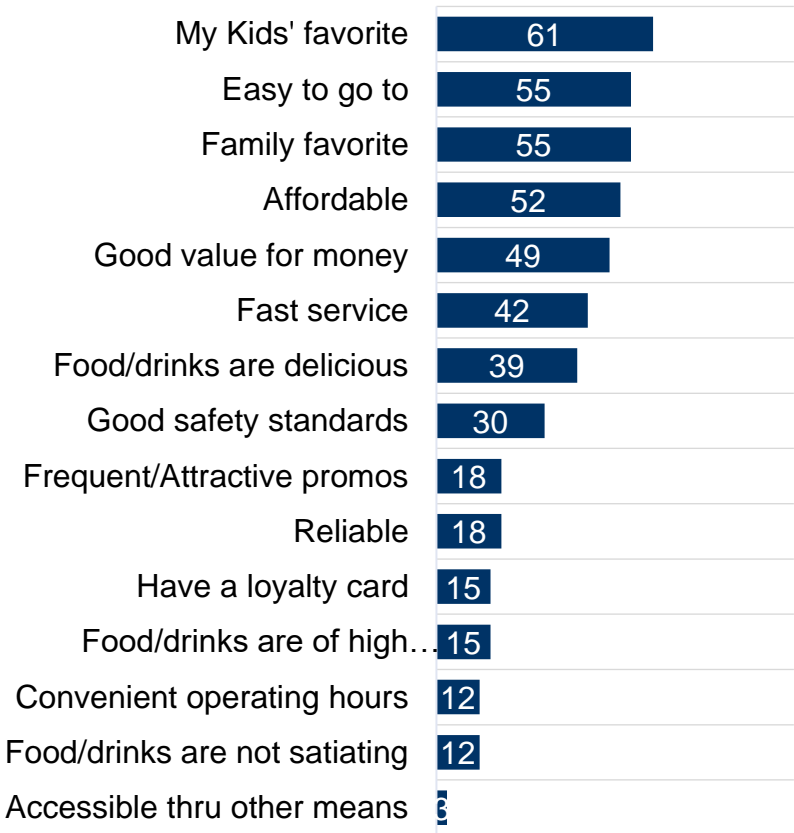
Base: n=111 (unweighted) Metro Manila
n=102 (unweighted) Metro Cebu
n=87 (unweighted) Metro Davao



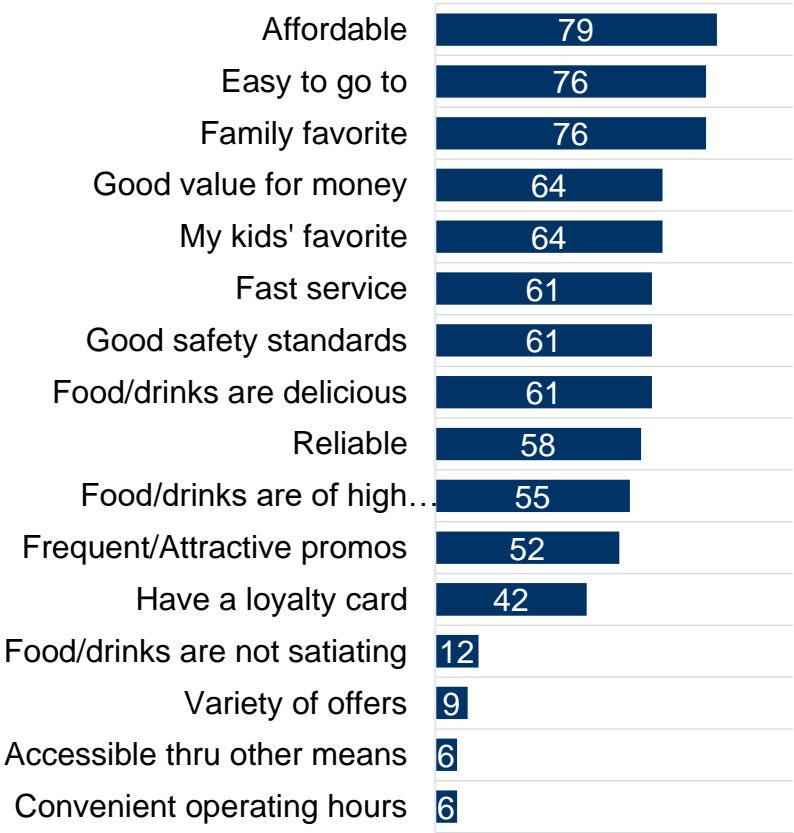
In the case of McDonald's, easy access is also coming out as one of the key reasons for frequent patronage on top of being a kids' favorite and affordability.

Reasons for Buying from McDonald's Most Often

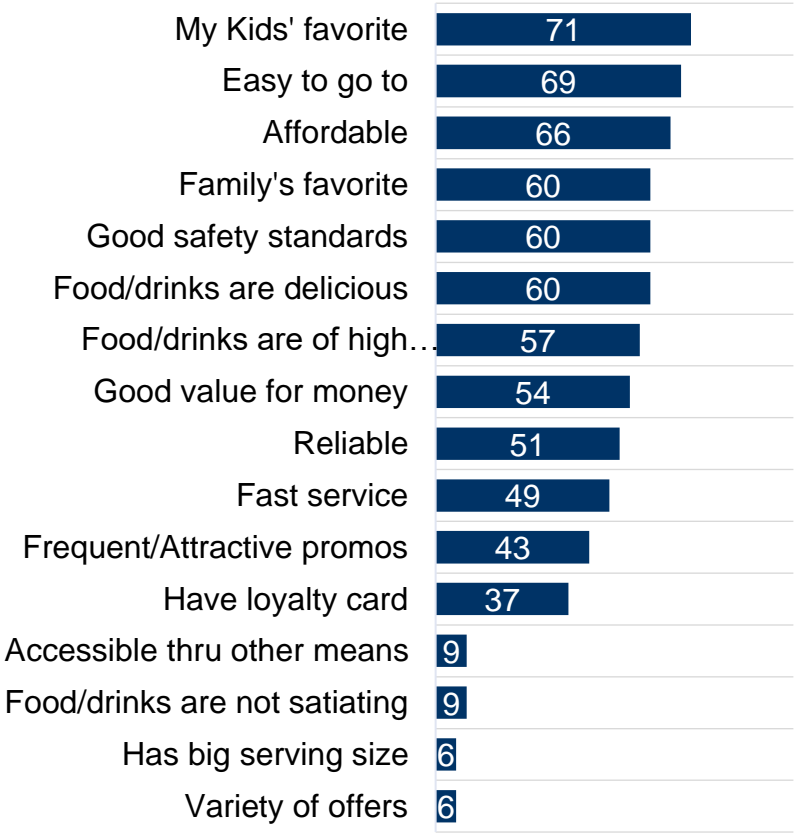
Metro Manila



Metro Cebu

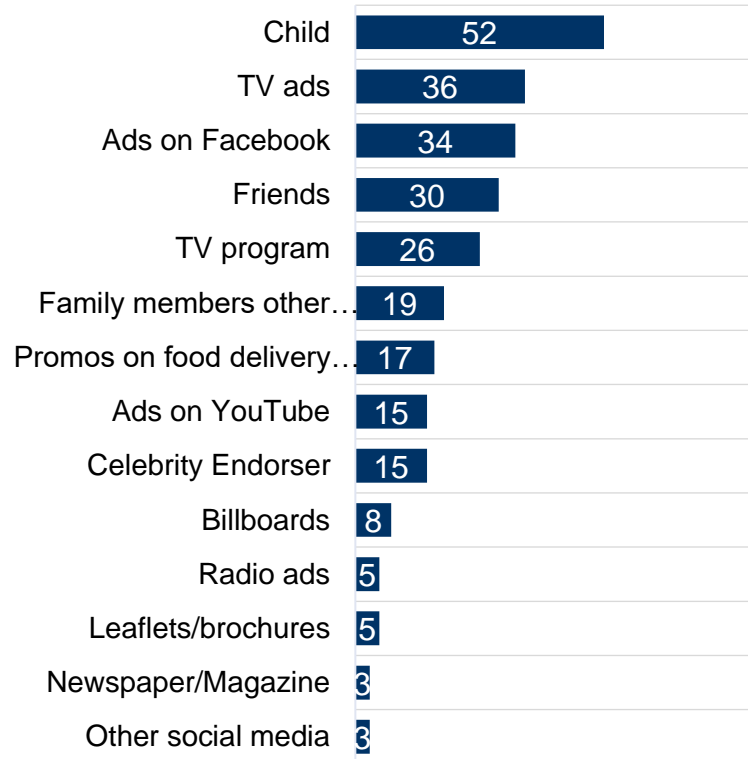


Metro Davao



Since the dominant BEO players are kids' favorites, it is no surprise that kids are the main influencers for frequent patronage towards these brands.

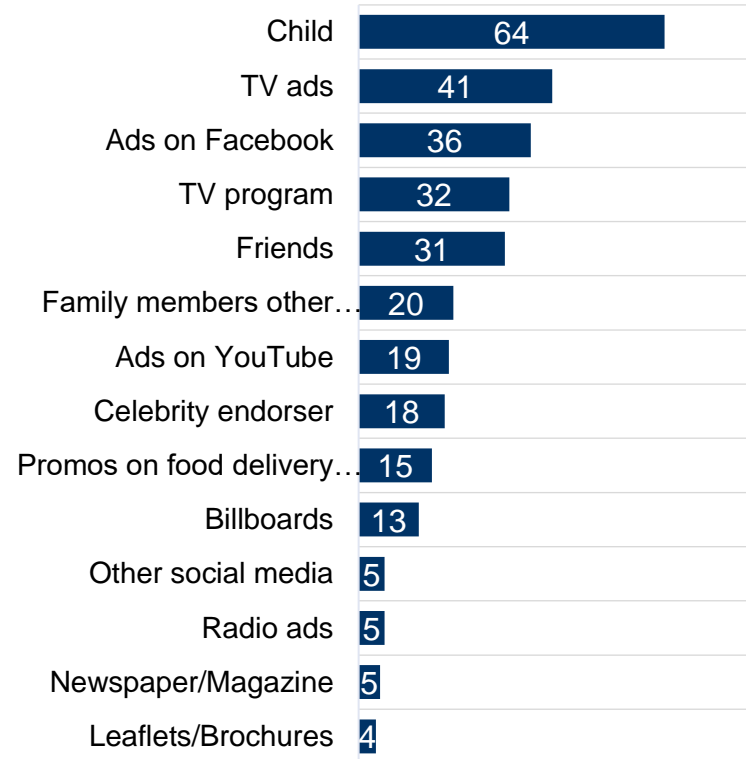
Total Metro Manila



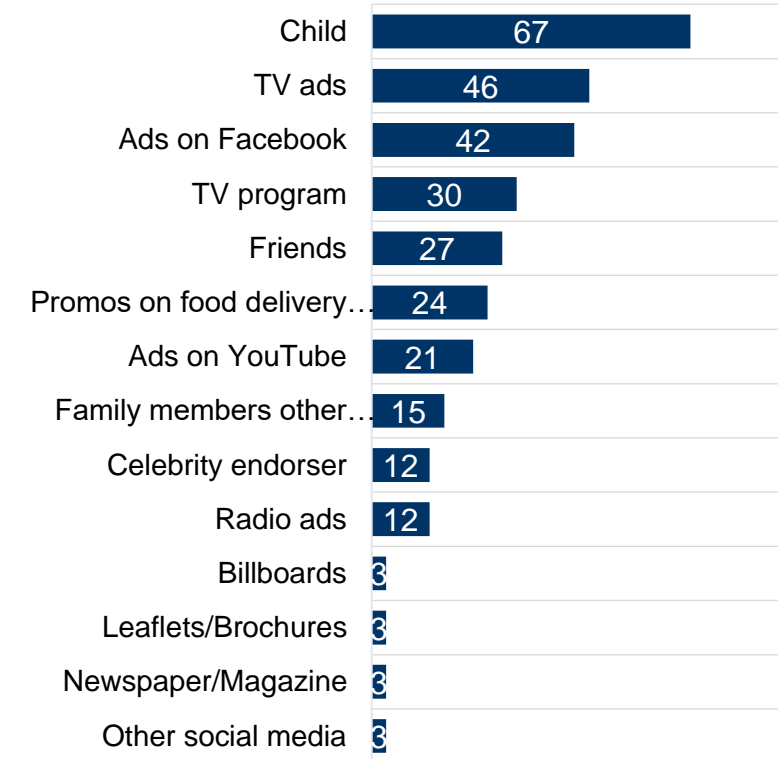
Base: n=200 (unweighted) Metro Manila



Purchase Influencers for BUMO



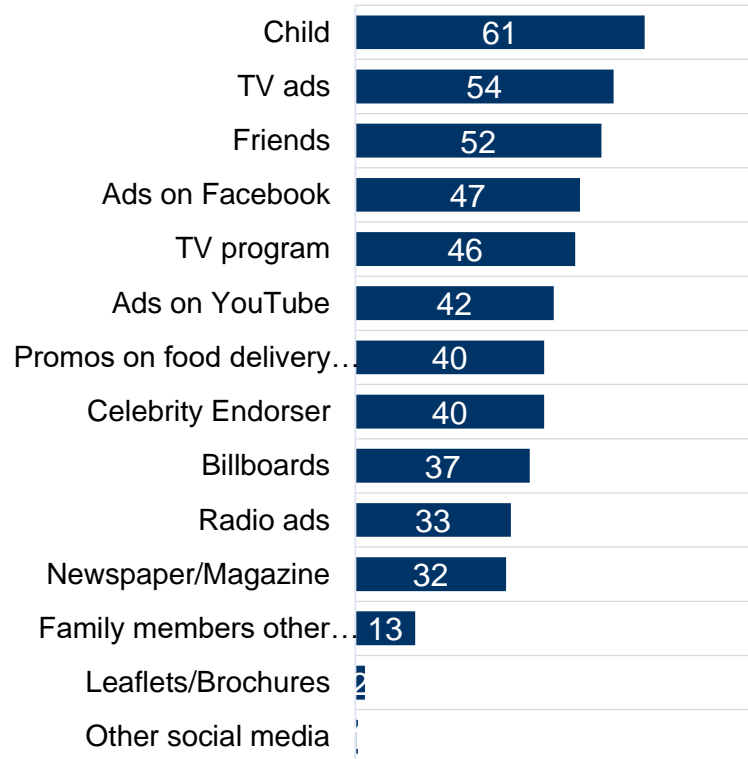
Base: n=111 (unweighted) Metro Manila



Base: n=33 (unweighted) Metro Manila

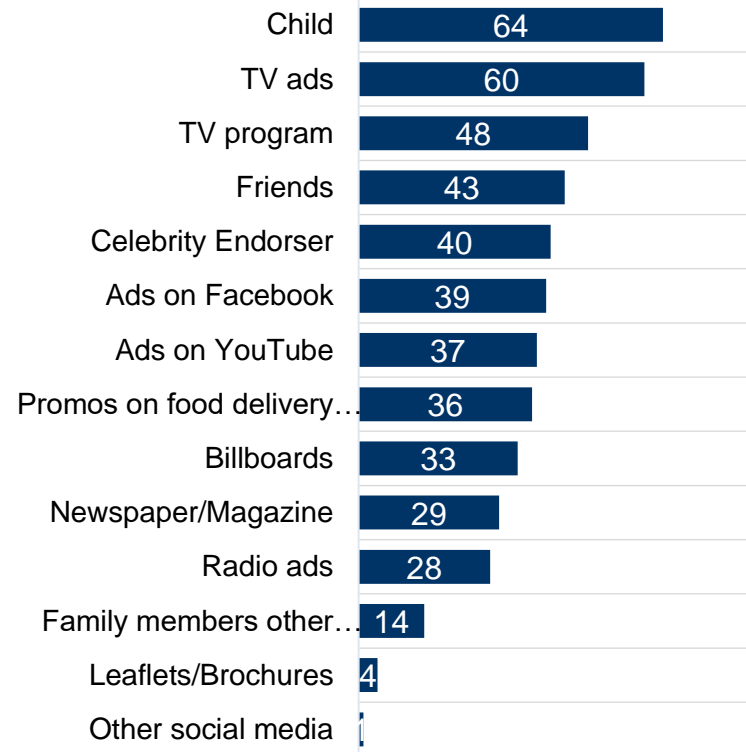
Kids are main influencers also cut-across key regions....

Total Metro Cebu

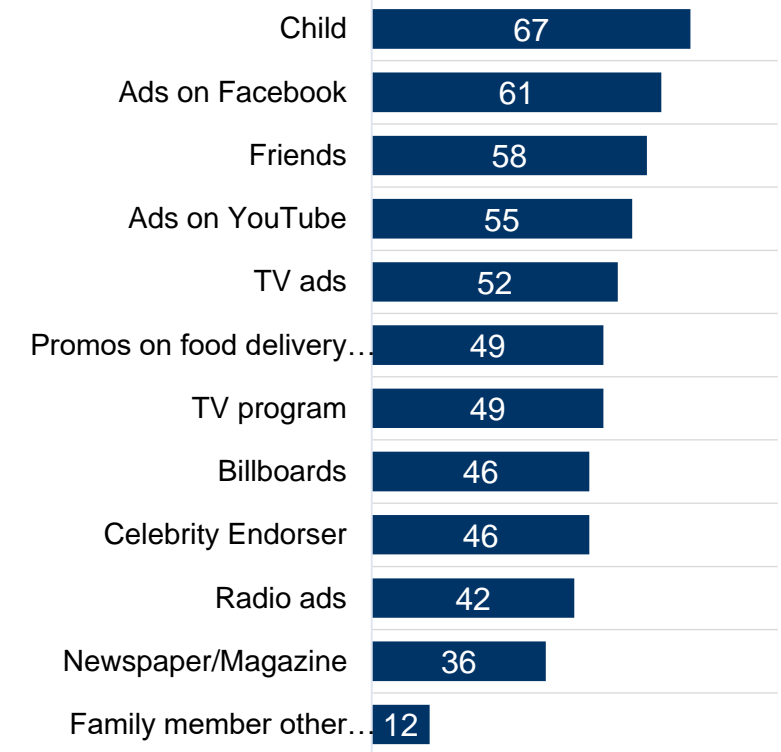


Base: n=200 (unweighted) Metro Manila

Purchase Influencers for BUMO



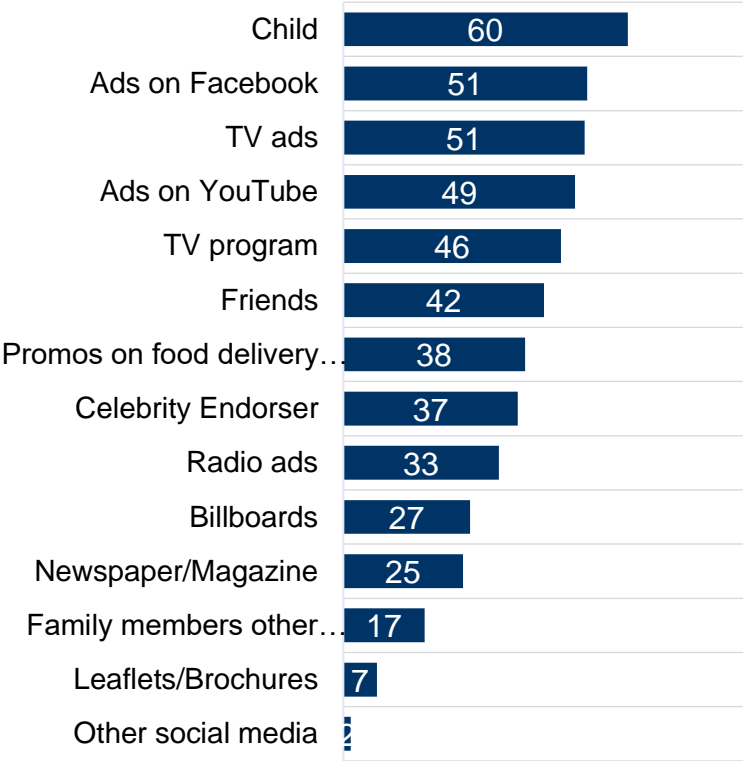
Base: n=102 (unweighted) Metro Manila



Base: n=33 (unweighted) Metro Manila

Digital Platform's influence is as big as Traditional TV's.

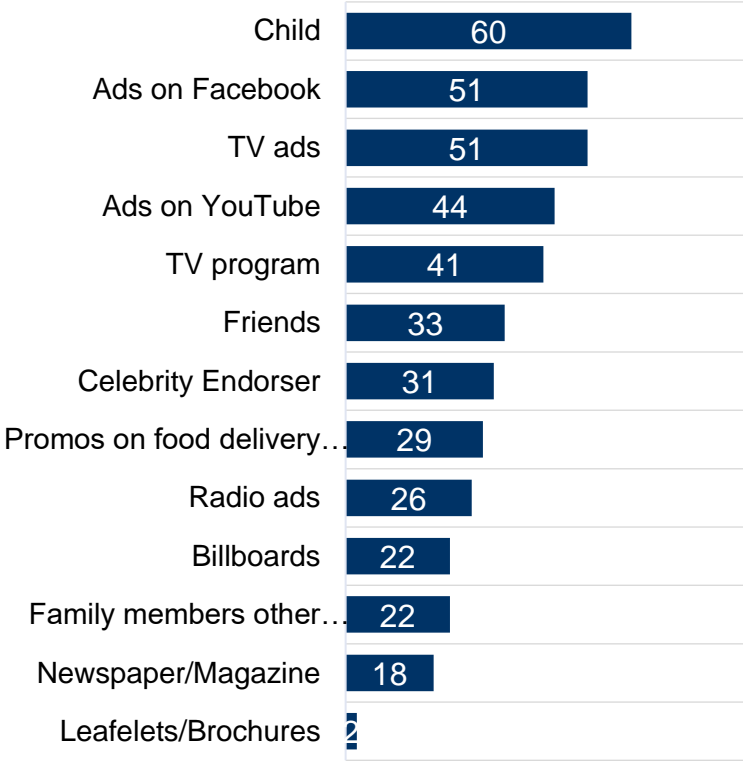
Total Davao City



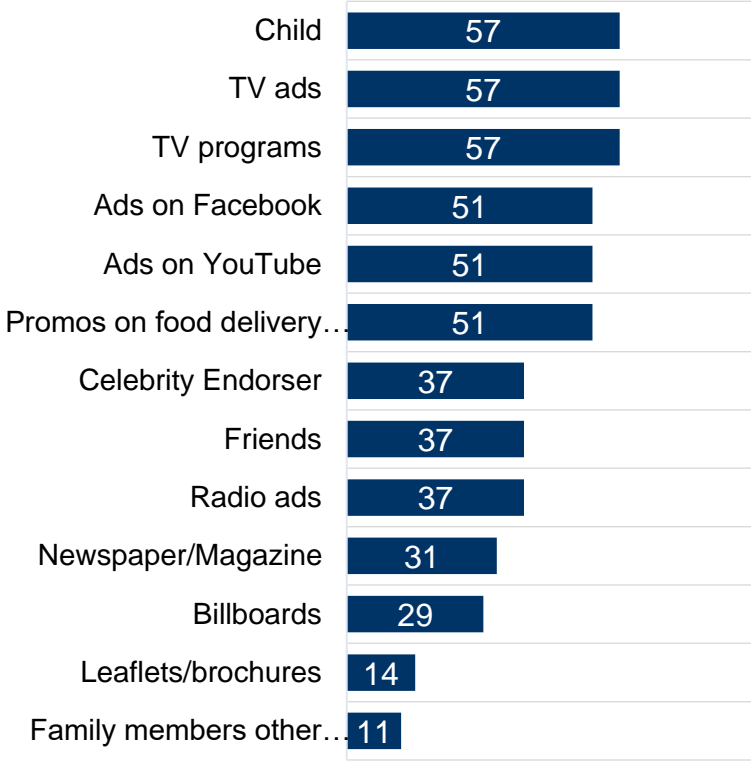
Base: n=200 (unweighted) Metro Manila



Purchase Influencers for BUMO



Base: n=87 (unweighted) Metro Manila



Base: n=35 (unweighted) Metro Manila

EAT-OUT HABITS DURING THE PANDEMIC



Summary:

- In terms of buying food, **Take-out** comes out the popular choice across all areas. **Delivery** follows.
- **Convenience** and **safety** motivate high take-out and delivery incidence across areas.
- For delivery, **aggregators** are the most common access points availed by eat-out consumers.
- Only about **15%** have dined-out in 2021, with most still dining indoors.
- **Necessity** is the main reason for dining out, while some did as a break and to seek out a better ambiance.
- Majority still have not dined-out since **kids are not yet allowed.**

Consumers in Davao are more likely than those in MMA and Cebu to have last bought from their BUMO.

Brands Last Purchased

Metro Manila

BUMO	Last Purchased
Jollibee	56
McDonald's	17
Shakey's	3
Macao..	2
7-Eleven	2
Greenwich	2
Papa..	1
Tokyo Tokyo	1
KFC	1
Mang Inasal	1
Chowking	1
CoCo	1
Jollibee	47
McDonald's	16
Macao..	3
Shakey's	3
Starbucks	2
7-Eleven	2
KFC	2
Greenwich	2
Chowking	2
Burger King	1
Mang Inasal	1
Tokyo Tokyo	1

Metro Cebu

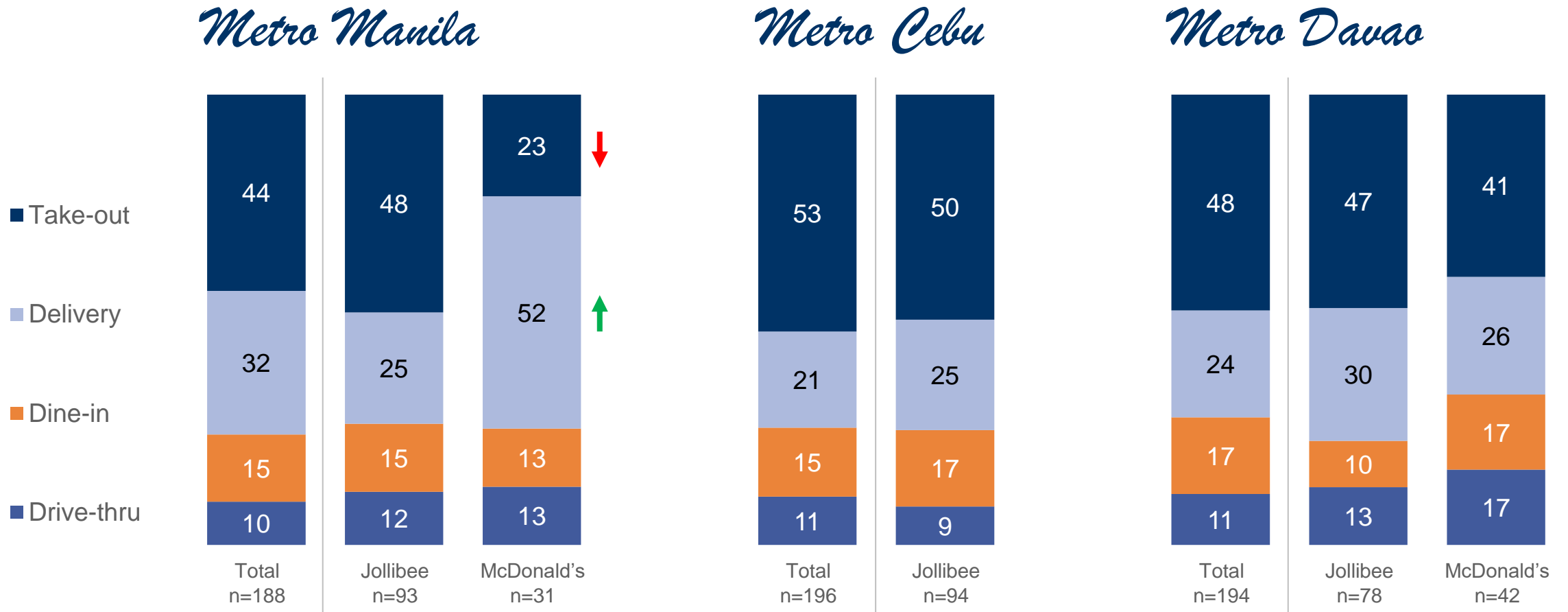
BUMO	Last Purchased
Jollibee	51
McDonald's	17
Chowking	6
Mang Inasal	5
KFC	2
Dunkin'..	2
7-Eleven	2
Greenwich	2
Max's..	1
Korean..	1
Shakey's	1
I Love..	1
Jollibee	47
McDonald's	13
Mang Inasal	7
Chowking	6
7-Eleven	3
Greenwich	3
KFC	2
S&R	1
Macao..	1
I Love..	1
Shakey's	1
Burger King	1

Metro Davao

BUMO	Last Purchased
Jollibee	44
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KFC	4
Greenwich	3
7-Eleven	3
Burger King	2
Turks	1
Macao..	1
Bonchon	1
CoCo	1
Jollibee	39
McDonald's	21
Mang Inasal	6
Chowking	5
KFC	4
Greenwich	4
7-Eleven	3
Tokyo Tokyo	2
Burger King	2
Shakey's	1
Red Ribbon	1
Bonchon	1

Take-out surpasses all the other channels across areas, driven by Jollibee. McDonald's (in MMA) is more frequently bought via delivery though.

How Aailed of Brands Last Purchased



Base: n=188 (unweighted) Metro Manila
n=196 (unweighted) Metro Cebu
n=194 (unweighted) Metro Davao

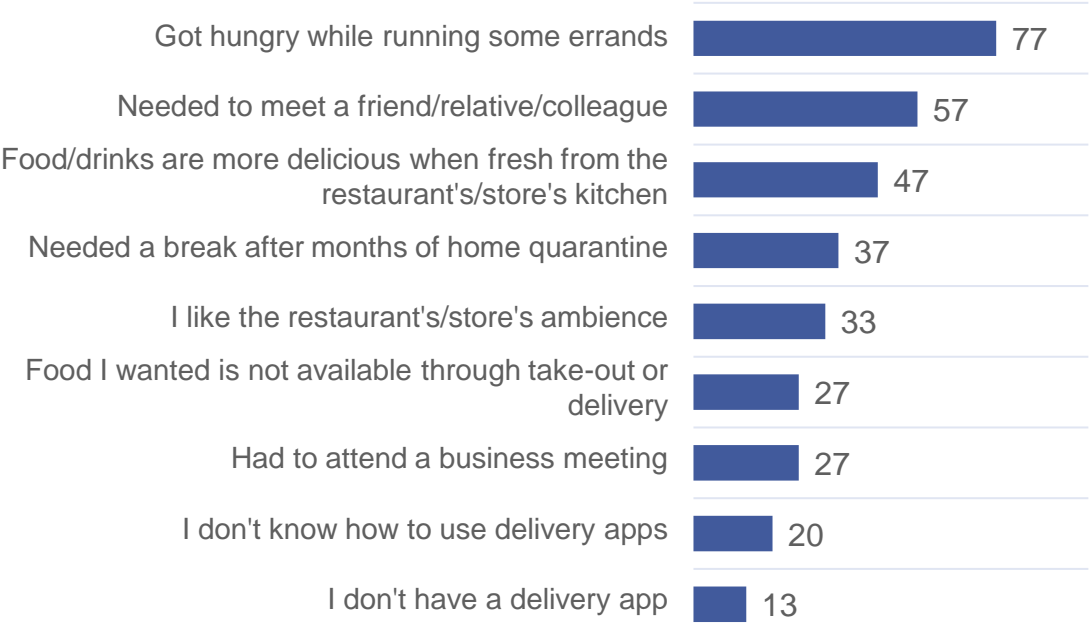
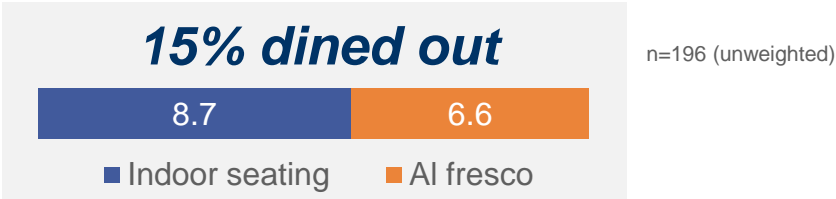
↑ Sig higher vs. Total [area]

↓ Sig lower vs. Total [area]

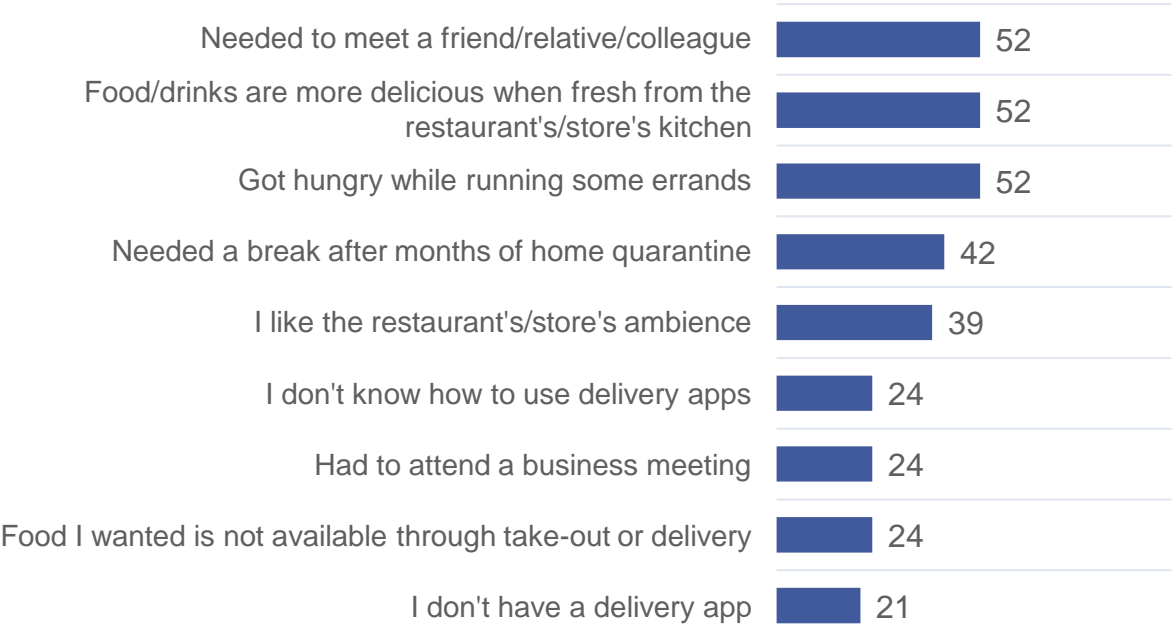
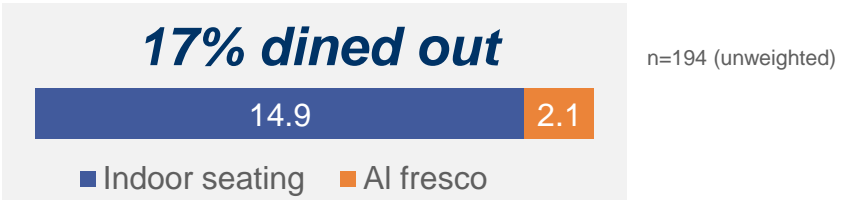
Some of those who dined out recently cite necessity as a reason, while others say they really sought out the experience.

Reasons for Dining Out

Metro Cebu



Metro Davao



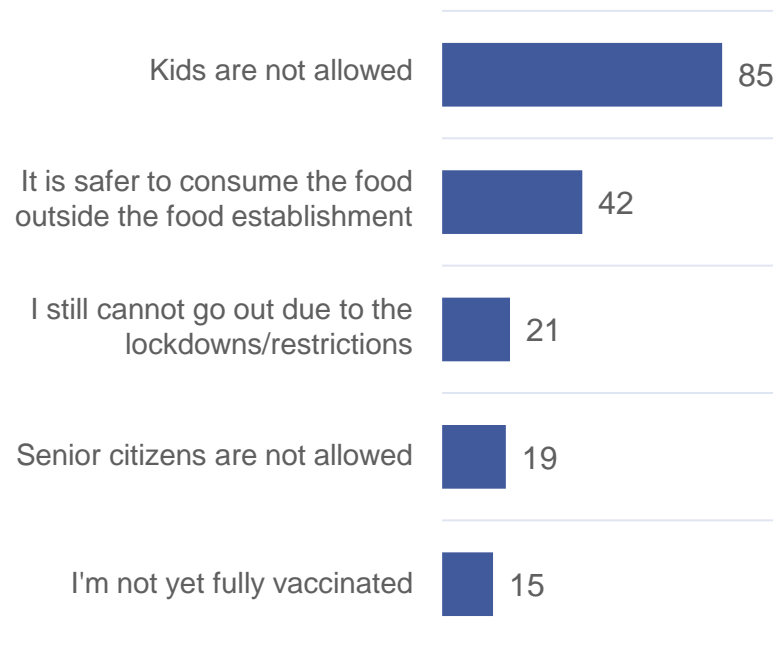
Meanwhile, the primary reason for not dining out is the stay-at-home order for children.

Reasons for NEVER Dining Out in P12M

Metro Manila

42% did not dine out

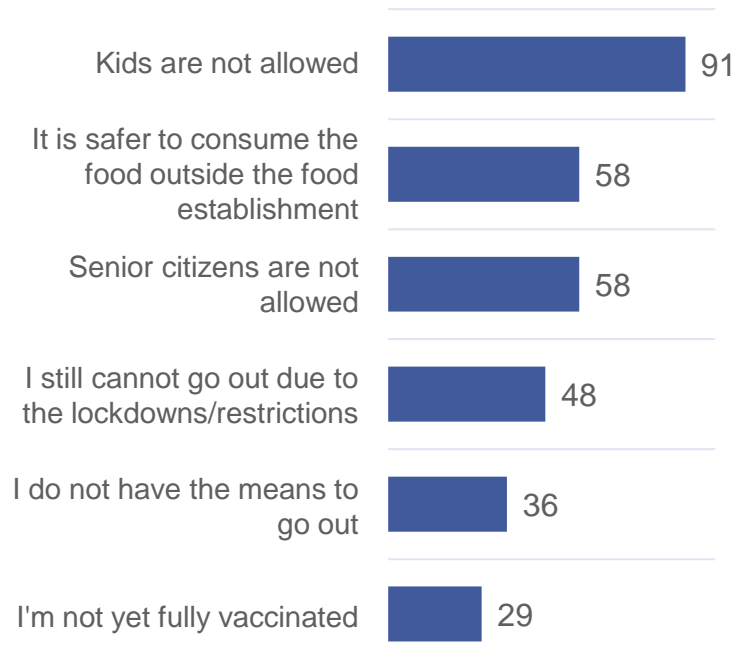
n=188 (unweighted)



Metro Cebu

39% did not dine out

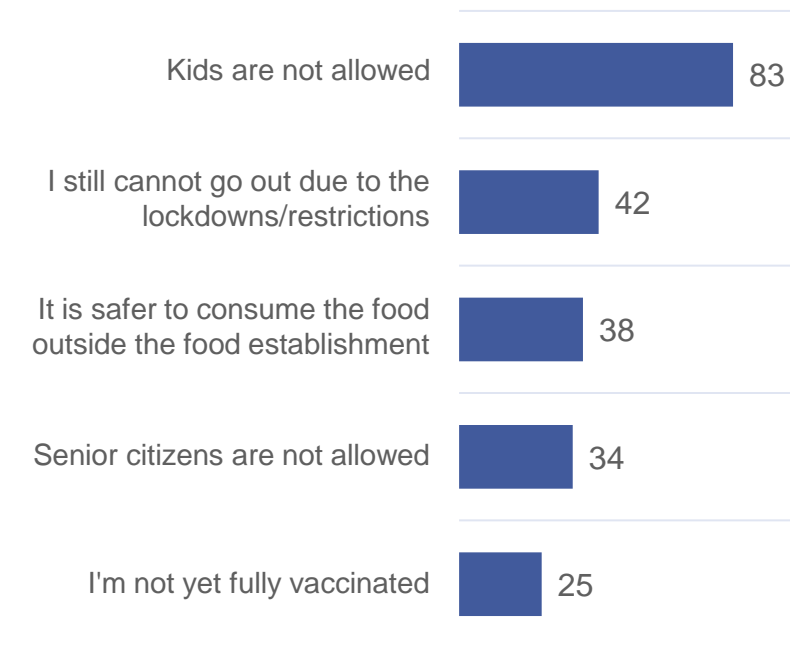
n=196 (unweighted)



Metro Davao

33% did not dine out

n=194 (unweighted)

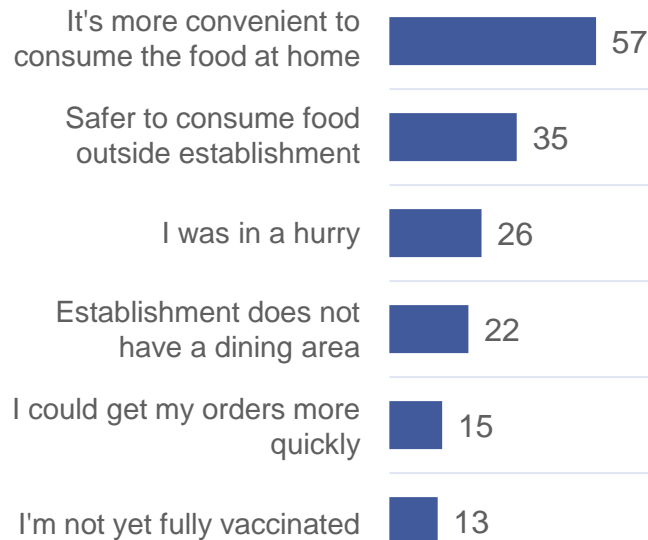
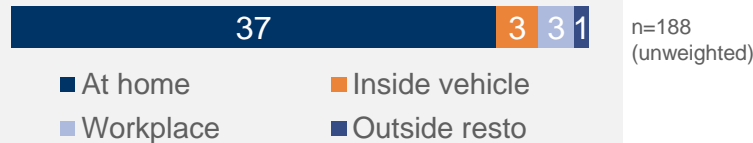


Convenience and safety motivate high take-out incidence across areas.

Reasons for Taking Food Out

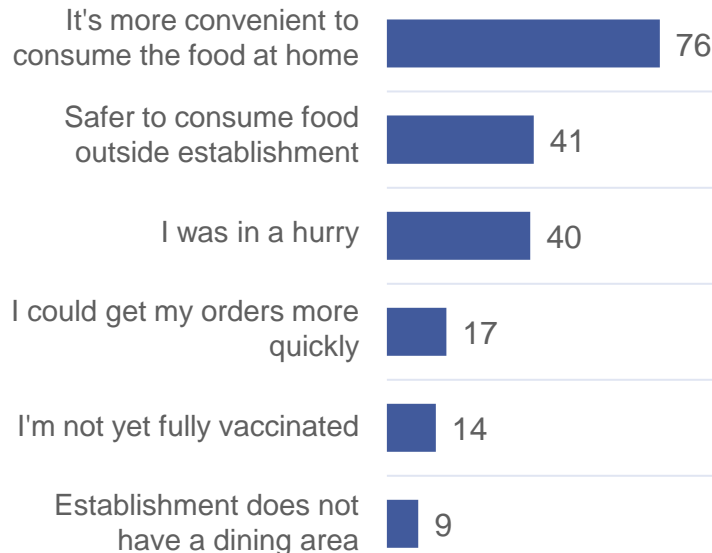
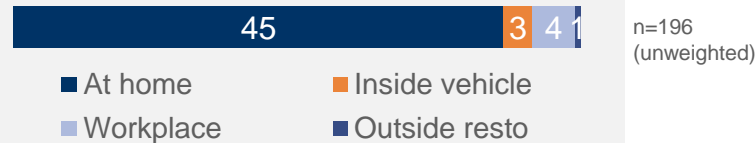
Metro Manila

44% had food taken out



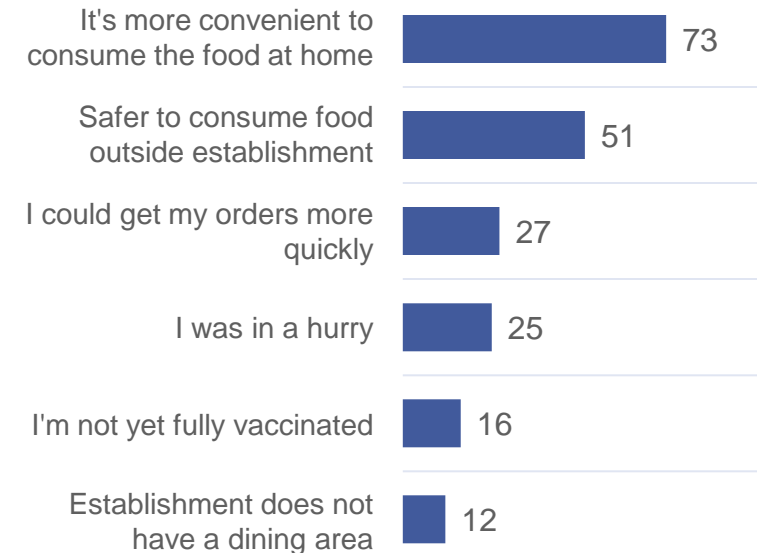
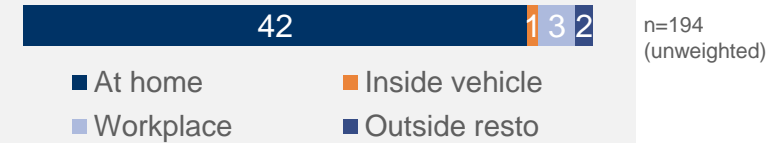
Metro Cebu

53% had food taken out



Metro Davao

48% had food taken out



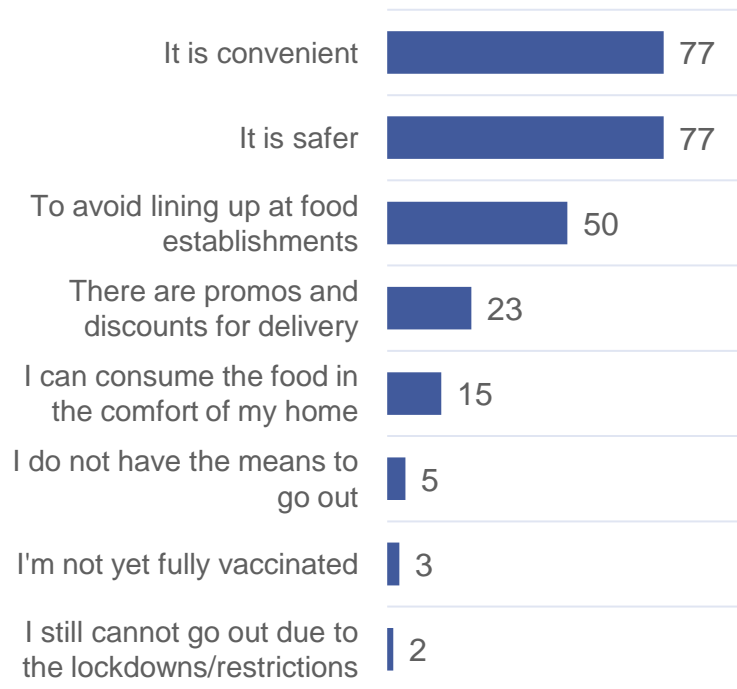
Base: n=82 (unweighted) Metro Manila
n=103 (unweighted) Metro Cebu
n=93 (unweighted) Metro Davao

The same may be said of delivery.

Metro Manila

32% had food delivered

n=188 (unweighted)

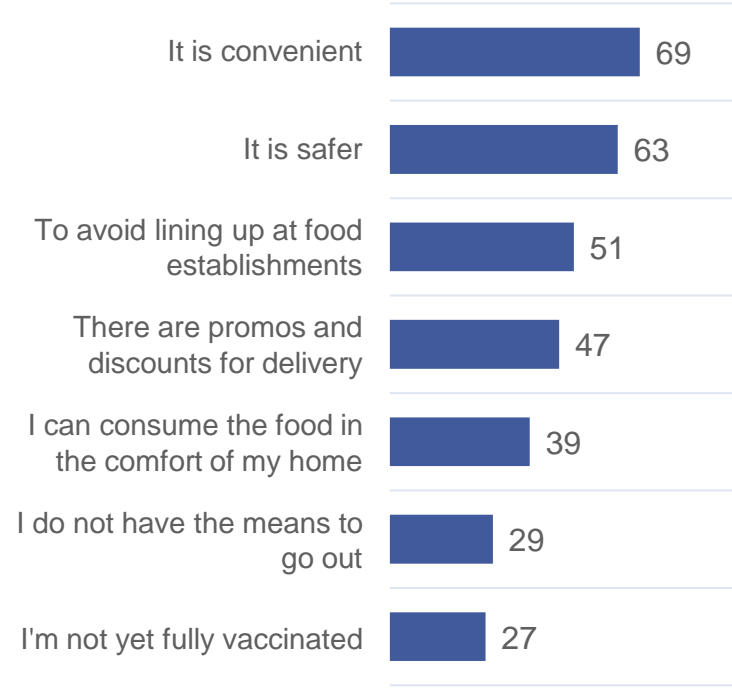


Reasons for Having Food Delivered

Metro Cebu

21% had food delivered

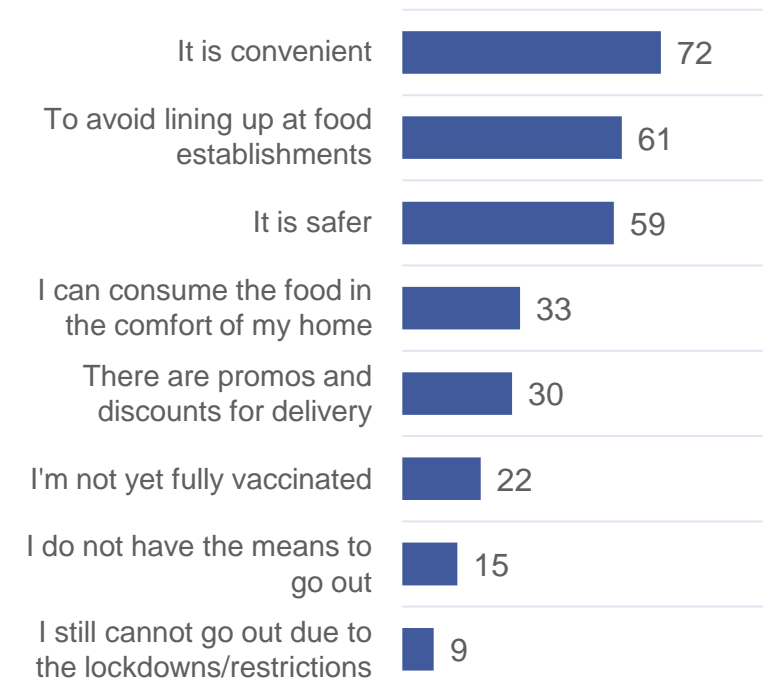
n=196 (unweighted)



Metro Davao

24% had food delivered

n=194 (unweighted)



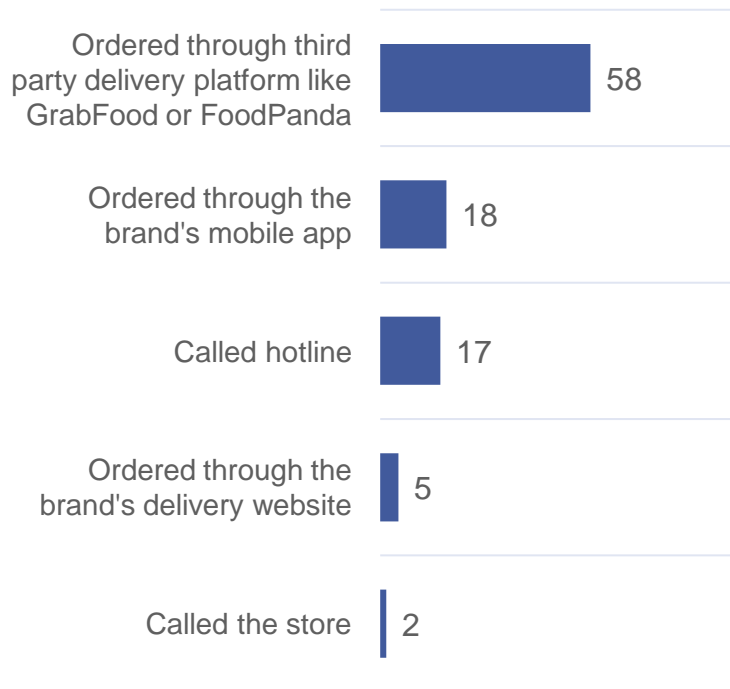
Aggregators are the most commonly used access points for delivery.

Delivery Access Points

Metro Manila

32% had food delivered

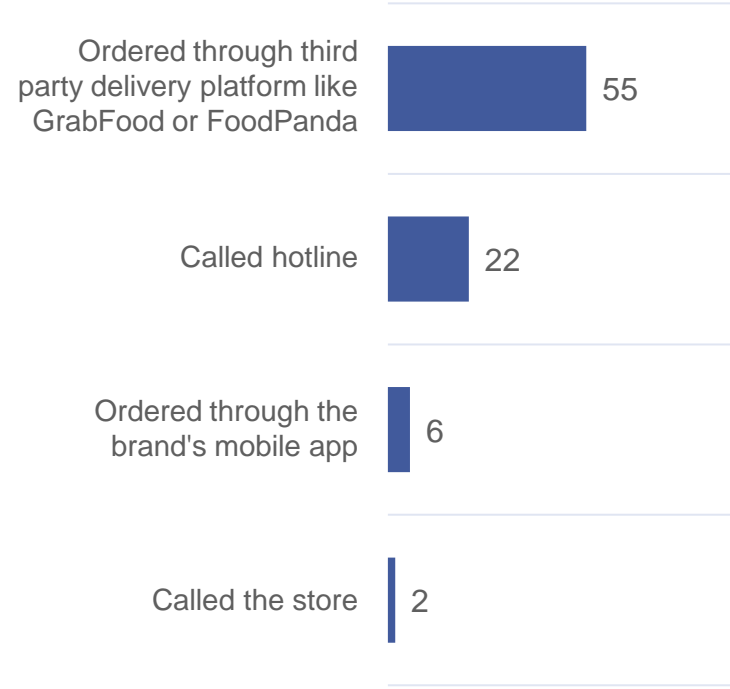
n=188 (unweighted)



Metro Cebu

21% had food delivered

n=196 (unweighted)



Metro Davao

24% had food delivered

n=194 (unweighted)



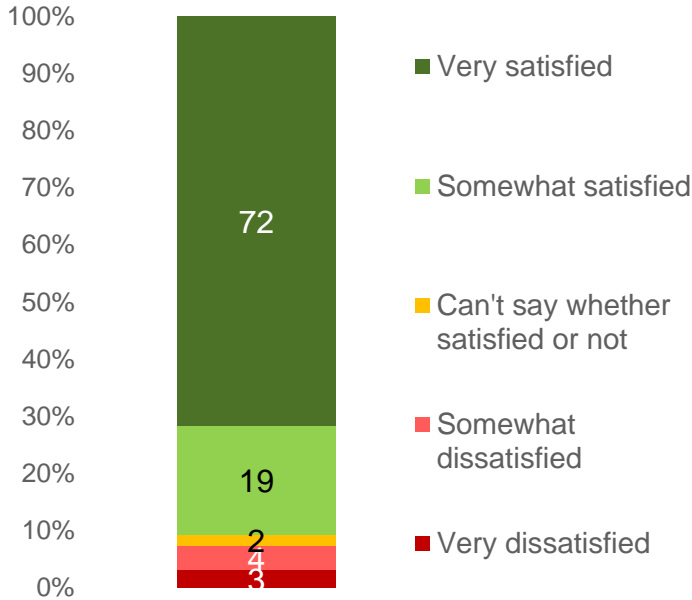
Delivery customers are generally satisfied with their experience...

Overall Satisfaction with Delivery

Metro Manila

86% had food delivered in P12M

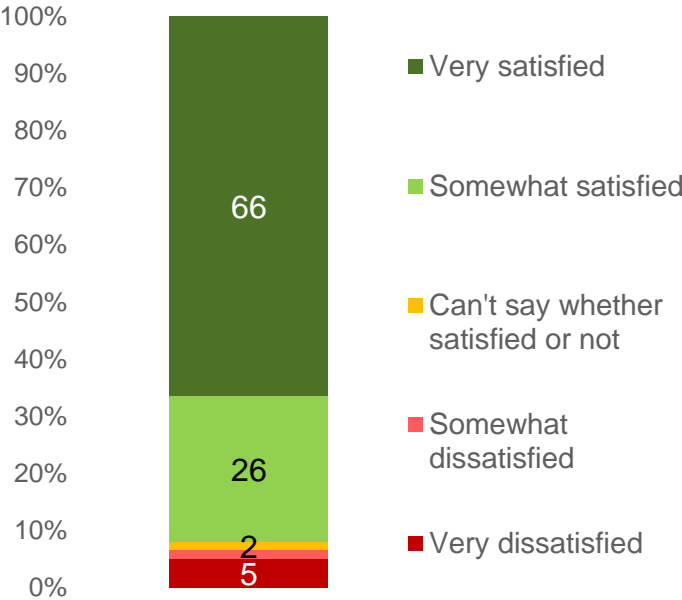
n=188 (unweighted)



Metro Cebu

70% had food delivered in P12M

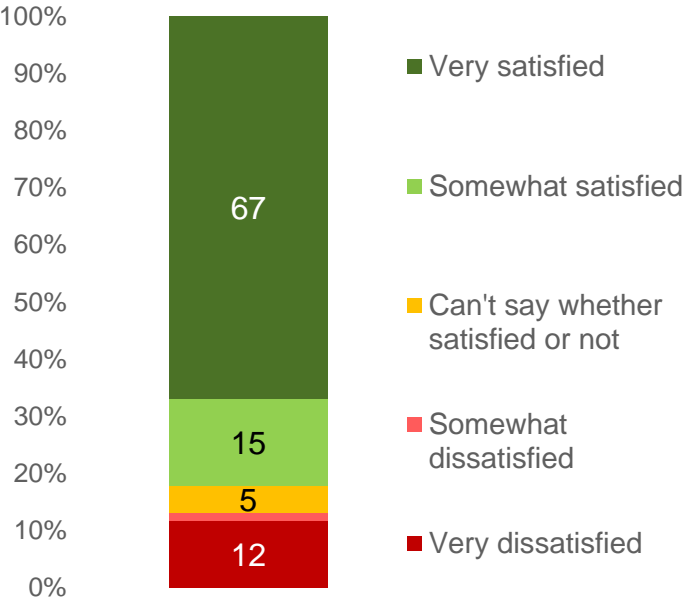
n=196 (unweighted)



Metro Davao

75% had food delivered in P12M

n=194 (unweighted)



Base: n=162 (unweighted) Metro Manila
n=137 (unweighted) Metro Cebu
n=145 (unweighted) Metro Davao

...counting convenience and accessibility as key reasons.

Why Satisfied with Delivery?

Metro Manila

91% are satisfied with delivery

n=162 (unweighted)



Metro Cebu

92% are satisfied with delivery

n=137 (unweighted)



Metro Davao

82% are satisfied with delivery

n=145 (unweighted)



Base: n=147 (unweighted) Metro Manila
n=126 (unweighted) Metro Cebu
n=119 (unweighted) Metro Davao

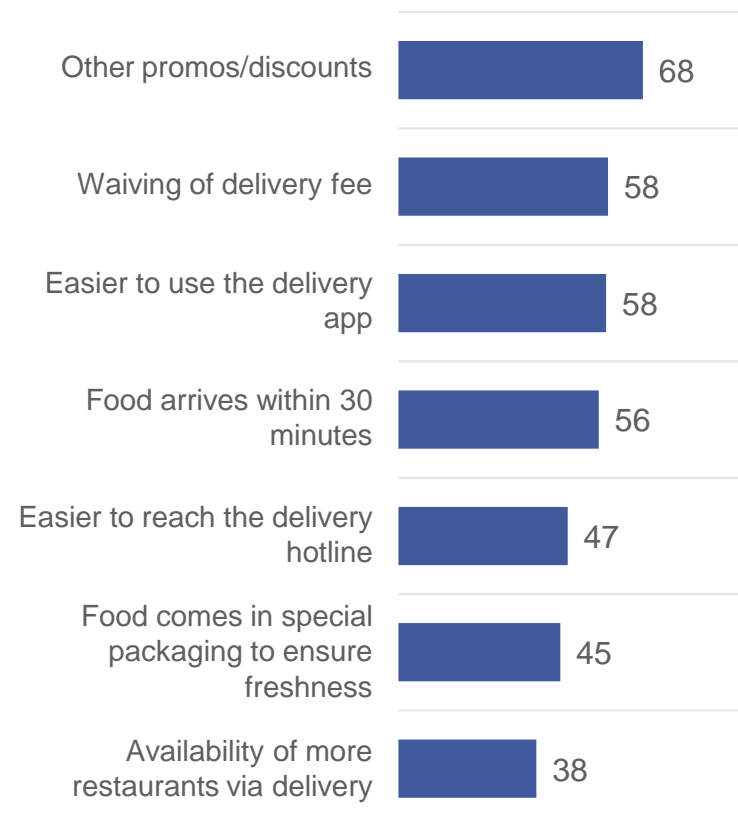
More promos and discounts as well as more user-friendly delivery apps are claimed to be potential triggers for increased delivery patronage.

What can make you deliver more frequently?

Metro Manila



Metro Cebu



Metro Davao



Base: n=188 (unweighted) Metro Manila
n=196 (unweighted) Metro Cebu
n=194 (unweighted) Metro Davao



EATING OUT IN 2022

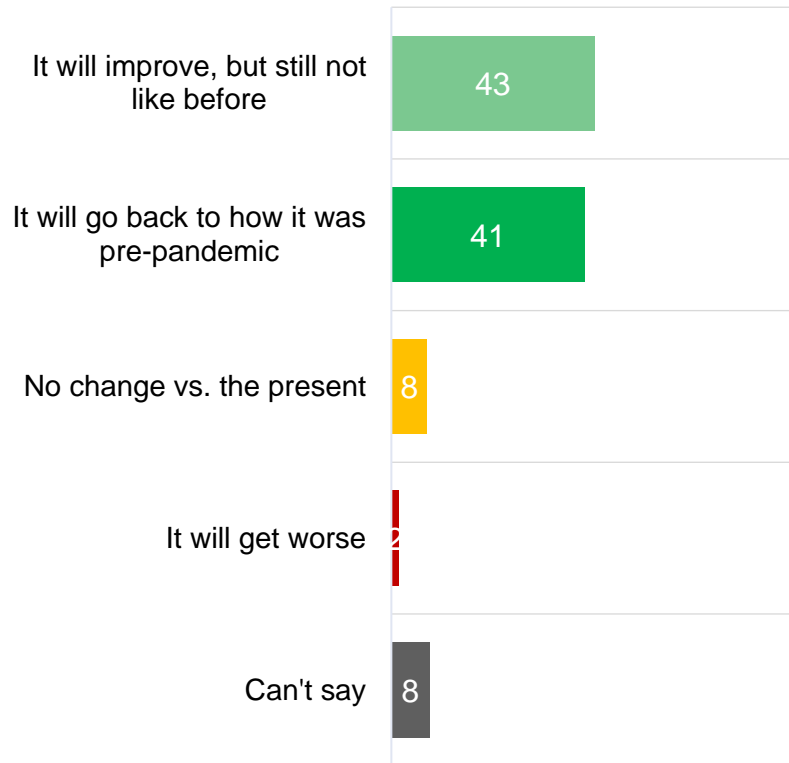
Summary:

- Consumers are generally **optimistic** that eat-out experience will either improve or return to the pre-pandemic ways in 2022.
- Still, **safety protocols** remain a top consideration for dining out.
- **Promos / Discounts** and **convenient pick-up** locations can motivate consumers to buy from eat-out brands more often.
- In fact, **loyalty card** is a key motivator to more frequent eat-out purchase. Unfortunately, this remains unoptimized in Cebu and Davao.

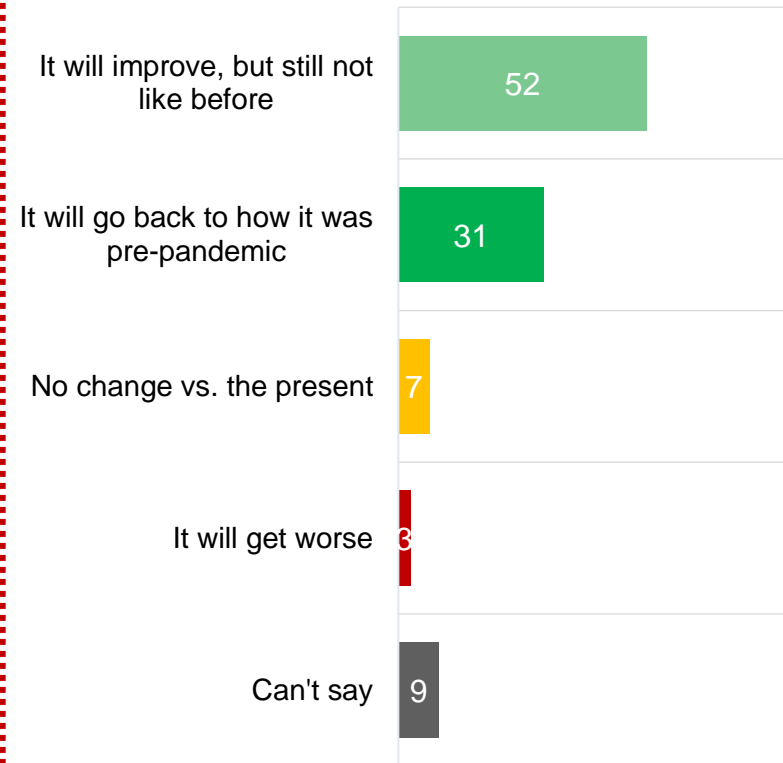
Consumers in Metro Manila are more optimistic that Eating-Out will return to the pre-pandemic phase in 2022.

Outlook on buying from Eat-out Places in 2022

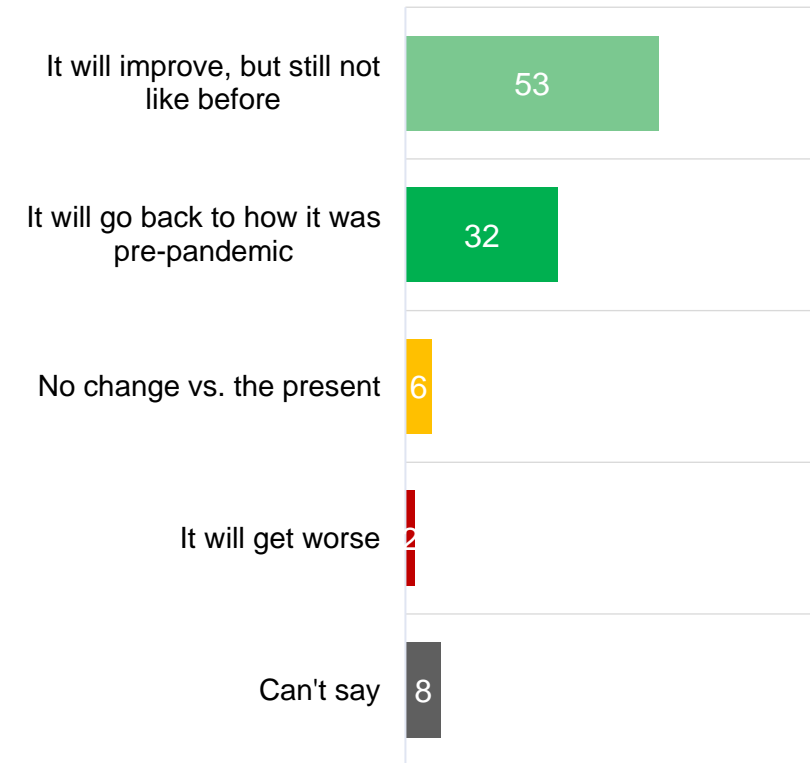
Metro Manila



Metro Cebu



Metro Davao

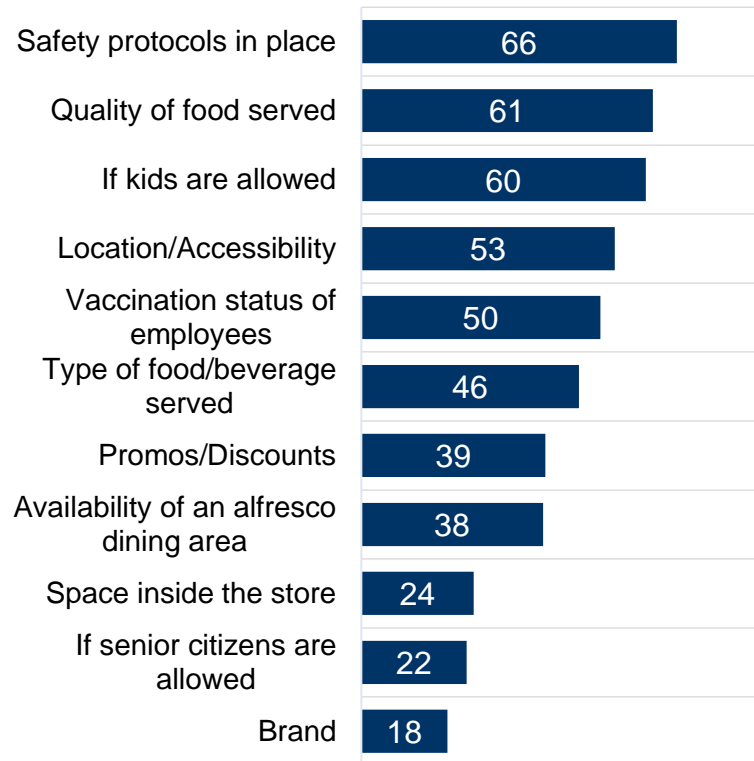


Base: n=200 (unweighted) Metro Manila
n=200 (unweighted) Metro Cebu
n=200 (unweighted) Metro Davao

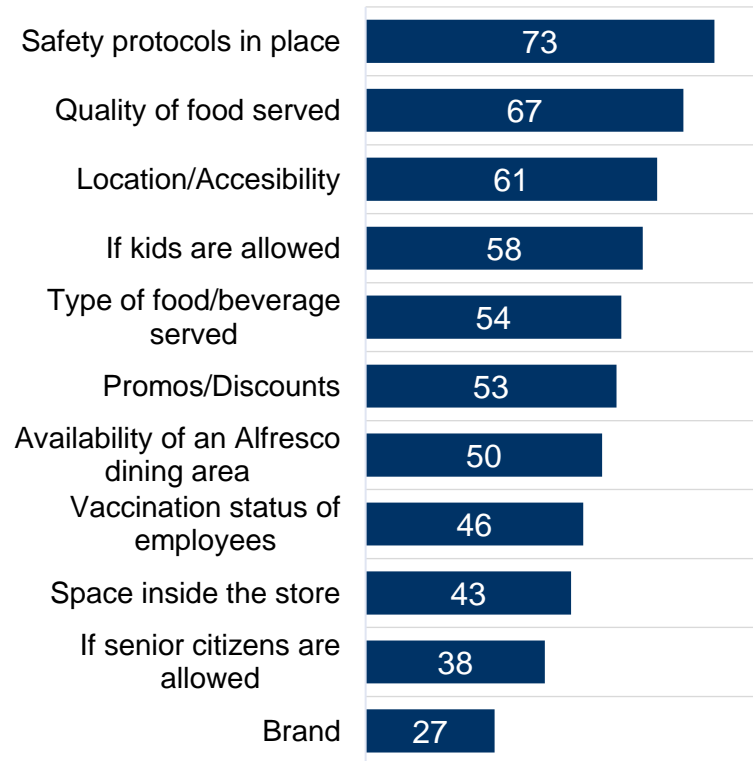
Still, safety protocols remain a top consideration for dining out. To a lesser degree, quality of food, accepting kids, and accessibility are also important considerations.

Factors to Consider when Dining Out

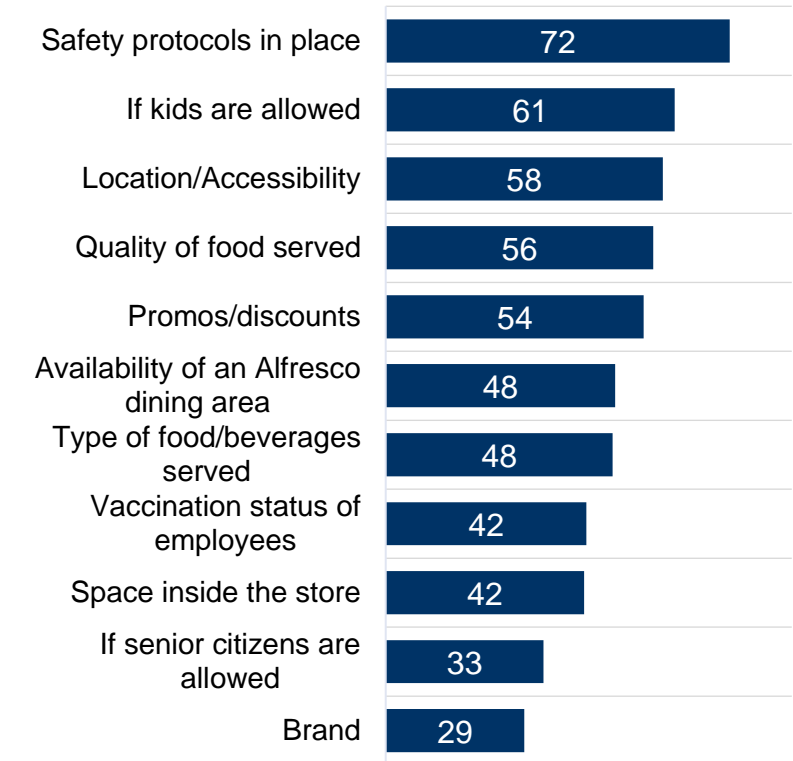
Metro Manila



Metro Cebu



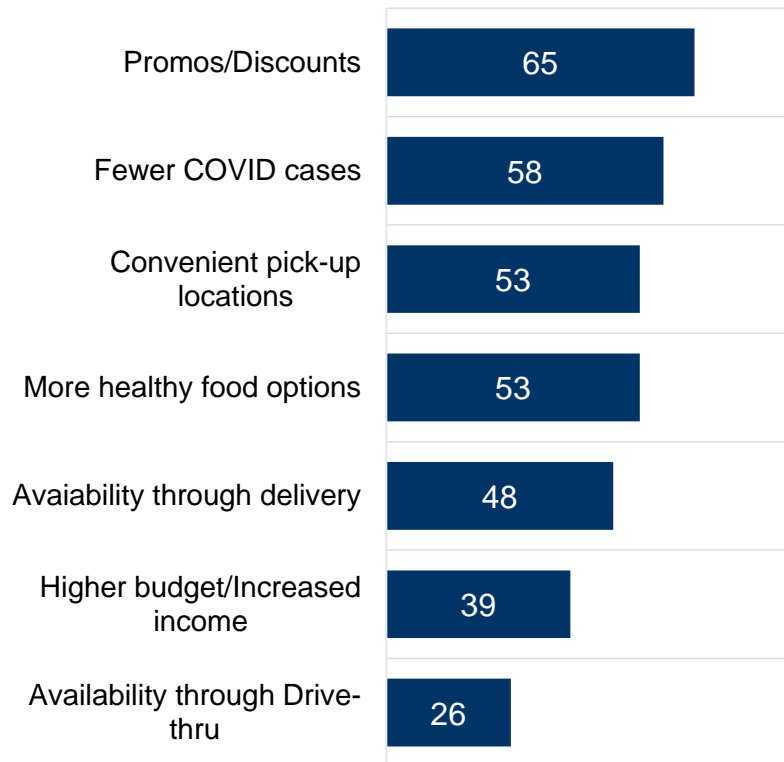
Metro Davao



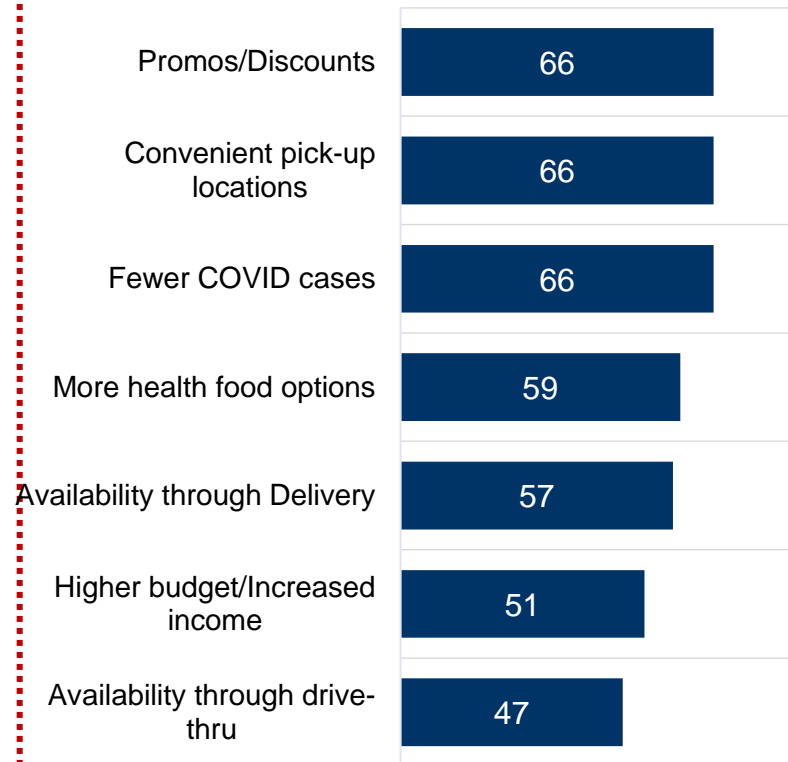
Offering discounts / promos as well as having convenient pick-up locations will encourage consumers to eat-out more often.

Factors that will make consumers Eat-Out more Often

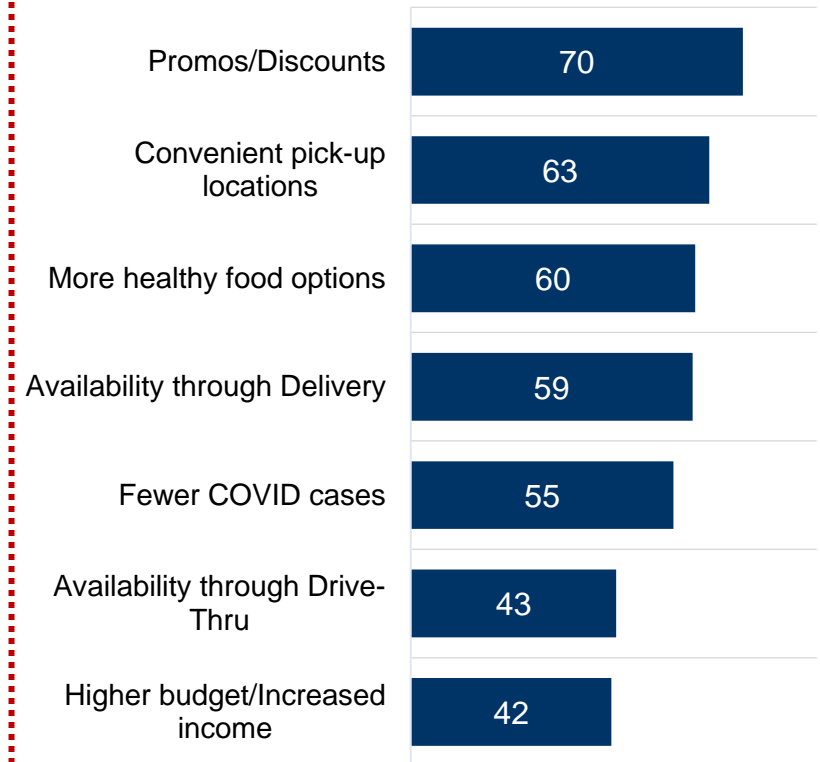
Metro Manila



Metro Cebu



Metro Davao

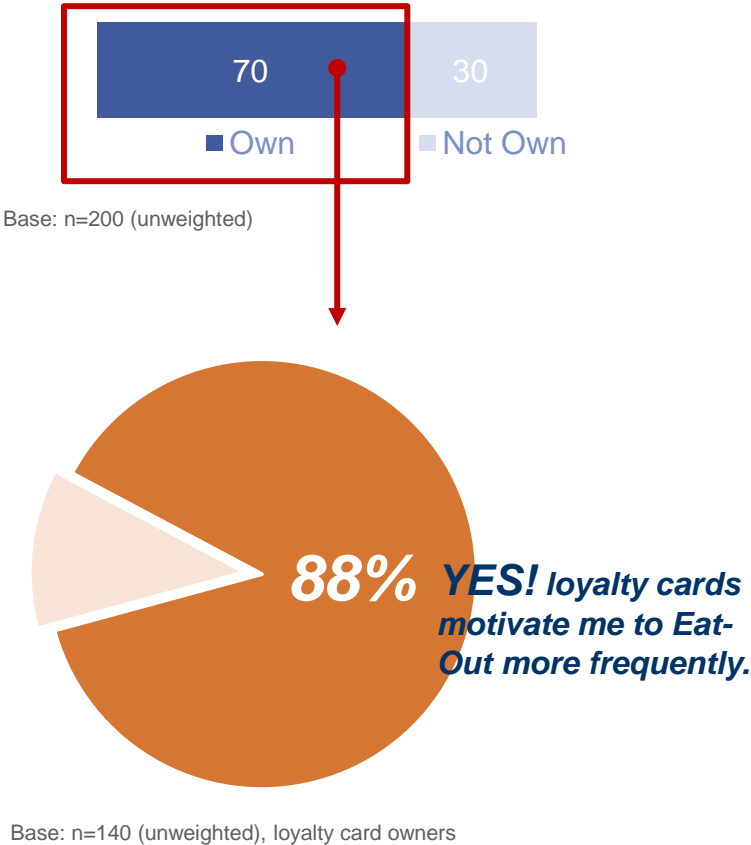


Base: n=200 (unweighted) Metro Manila
n=200 (unweighted) Metro Cebu
n=200 (unweighted) Metro Davao

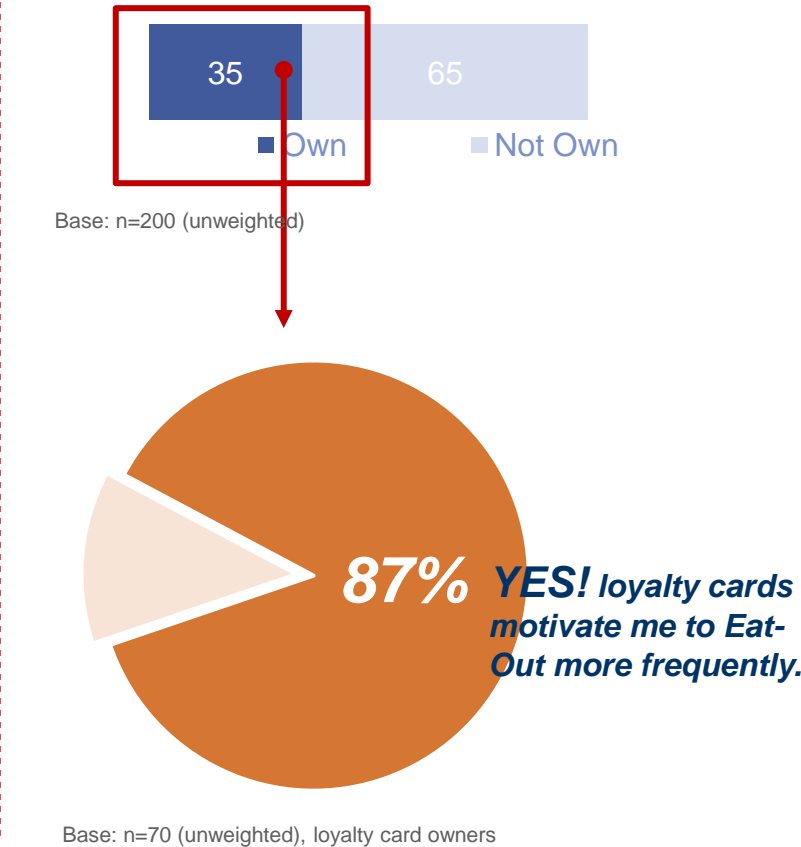
In fact, loyalty card helps in motivating consumers to eat-out more often.
This suggests opportunity to grow loyalty card offers & ownership in Cebu and Davao.

Loyalty Card Ownership and Use

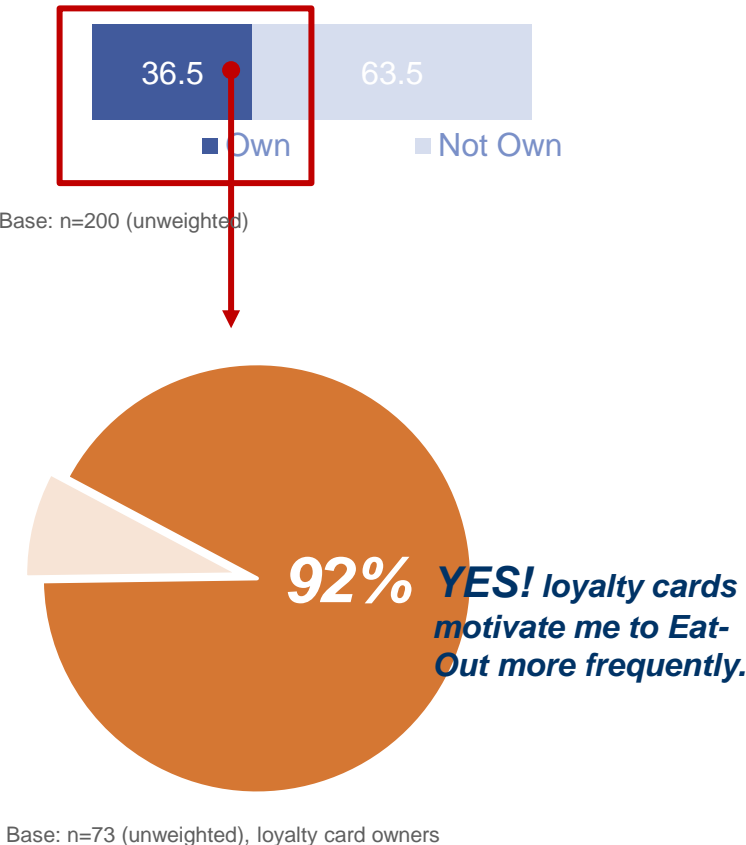
Metro Manila



Metro Cebu



Metro Davao



THANKS!

