

2026 ANNUAL



Beyond the Box

Hot. Fresh. Right on Time.

Pizza Delivery & Carryout Report

In partnership with:

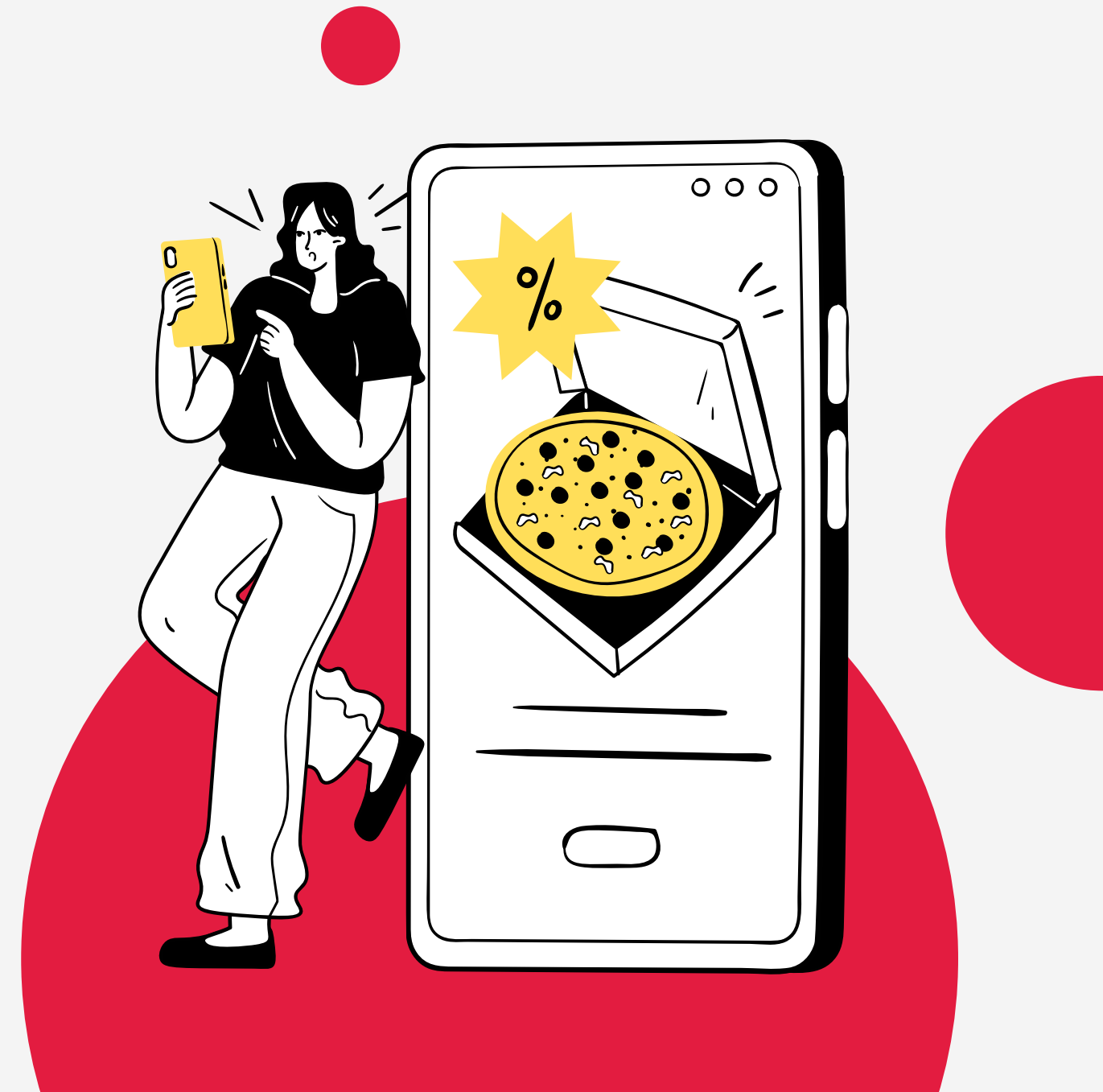


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About the Study

The 2026 Pizza Delivery and Carryout Report, conducted in partnership with PMQ Pizza, captures how leading pizza brands are performing in today's off-premises world from ordering to handoff. Built from mystery shops across 10 national chains, it spotlights rising expectations, shifting operational strengths, and how consistency continues to shape customer satisfaction.

The findings come at a time when the global pizza market is projected to grow to 409.5 billion dollars by 2032, according to Fortune Business Insights. This report takes you inside how large and mid-sized pizza brands are performing today by looking at their ordering systems and customer touchpoints, as well as key metrics like speed of service, order accuracy, friendliness, food quality, and overall satisfaction.

Here's what you'll find inside:

- Brand-by-brand comparisons for delivery and carryout performance.
- Data-backed takeaways drawn from real-world, mystery-shopped orders.
- Insights into loyalty programs and repeat intent.

The Road to the Data

- 600 total orders across 10 pizza brands (5 Large, 5 Mid) between September and October 2025.
- Orders placed were split over Phone Calls or App for Carryout and Delivery.
- All orders were placed directly with the brands, not through third-party delivery platforms, to ensure consistent comparison across operators.
- Each mystery shopper was instructed to order one specialty pizza and remove one topping.

** The 2026 study sample included approximately 80% new locations compared to 2025.*

Brands Evaluated



Key Metrics and How We Assessed Them

Speed of Service:

How would you describe your satisfaction with the speed of service? [Satisfied, Neutral, Unsatisfied]

Did you receive your order within the estimated preparation time? [Y/N]

Total order time, calculated by the time order was placed to when shopper received their food.

Order Accuracy:

Was your order accurate? (Correct size and correct toppings) [Y/N]

Friendliness:

Order-taker friendliness:

Overall, how would you rate the service received with the employee who took your order? [Friendly, Neutral, Not Friendly]

In-store friendliness:

Overall, how would you rate the service received with the employee you interacted with when picking up your order? [Friendly, Neutral, Not Friendly]

Driver friendliness:

Overall, how would you rate the service received with the employee who delivered your order? [Friendly, Neutral, Not Friendly]

Food Quality:

Was the pizza warm, when you received it? [Y/N]

After eating the pizza, please rate the pizza taste. [1 - 5 scale]

Overall Satisfaction:

Overall, rate your satisfaction with the experience. [Satisfied/Not Satisfied]



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A Slice of Change:

How Pizza Delivery Evolved in 2026

Few industries have defined convenience quite like pizza. Long before apps, loyalty programs, and driver tracking, pizza brands were perfecting the promise of hot food at your door. Delivery wasn't a side offering, it was the business model. And with every "30 minutes or less" guarantee, the industry set the standard for what customers still expect today.

Customers don't just crave pizza anymore. They're judging how fast it shows up, how fresh it feels, and whether the experience earns another order. Every tap, text alert, and box on the doorstep tells a story about your brand. And this year, those stories carried even more weight.



The Operator's Focus: Key Competitive Shifts

A Competitive Shift

Now in its second year, the study shows that mid-sized chains made the biggest move this year, closing the delivery satisfaction gap with large brands and achieving a significant **9.9 percentage point gain** in Delivery Overall Satisfaction (OSAT) compared to 2025.

Quality Is the Strongest Driver

Food quality emerged as the top driver of OSAT in 2026. Customers were far more likely to forgive a late order than a cold or off-tasting pizza. Poor food temperature had a larger negative impact on satisfaction than any other metric, including speed or friendliness. This highlights the importance of flavor preservation alongside temperature maintenance.

Insulation and Food Quality Are Linked

When a third-party driver delivered without an insulated bag, food temperature scores for **mid-sized chains dropped to 74%, and large-sized chains fell to 93.8%**. This reinforces the measurable impact insulation has on food quality performance.

A Shift in In-Store Service Metrics

Inside the restaurant, staff attentiveness declined year-over-year, with large chains seeing a drop of **15.1 percentage points**. This trend reflects a broader shift in core in-store service metrics.

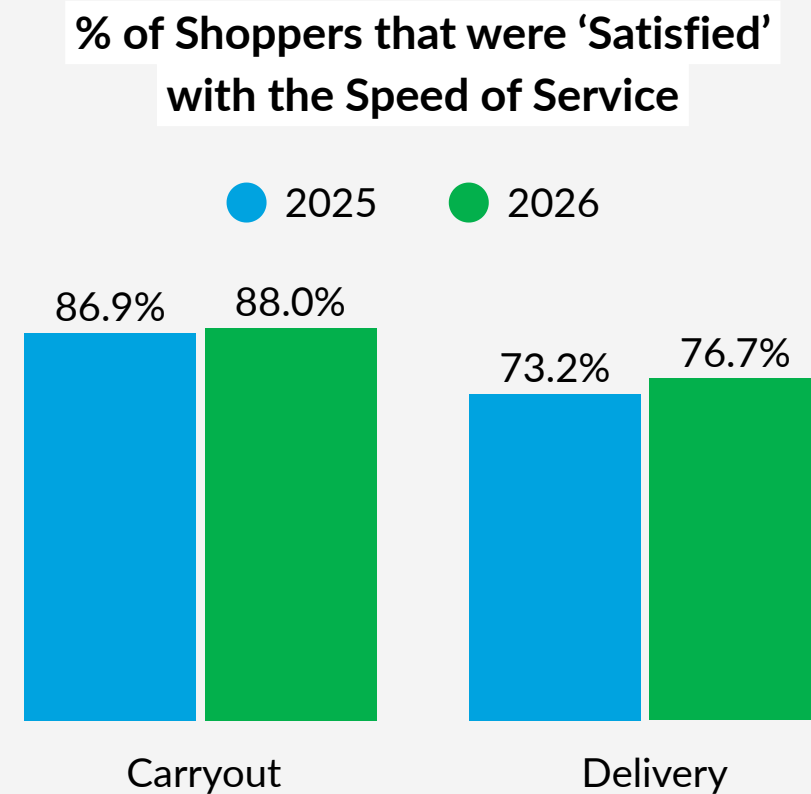
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Speed That Sells: *The Race for Fast, Fresh, and On-Time*

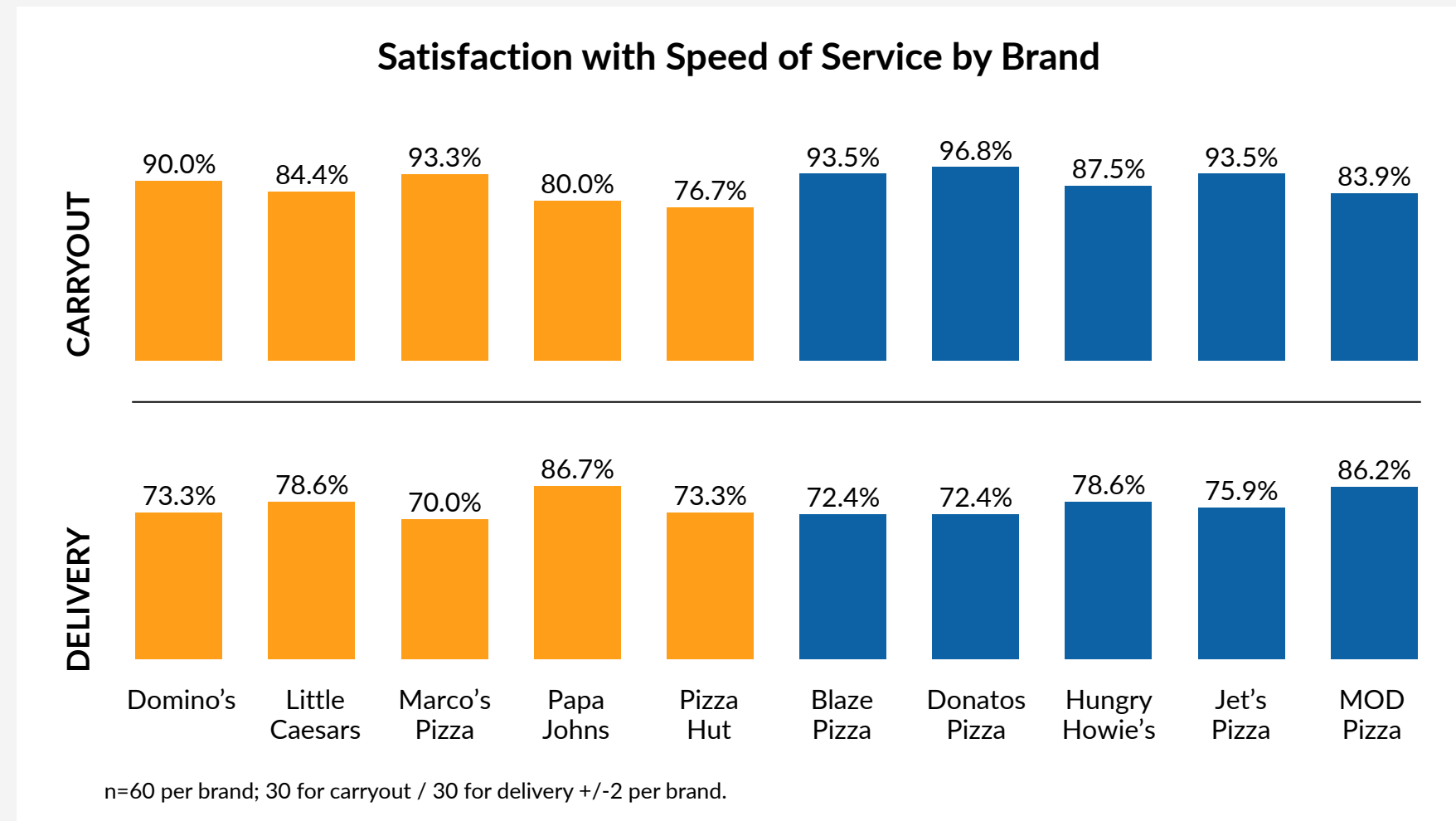
Speed That Sells:

The Race for Fast, Fresh, and On-Time

Speed continues to be one of the strongest drivers of the guest experience. In this year's study, **OSAT** was **49.8 percentage points higher** when customers were satisfied with the speed of service.



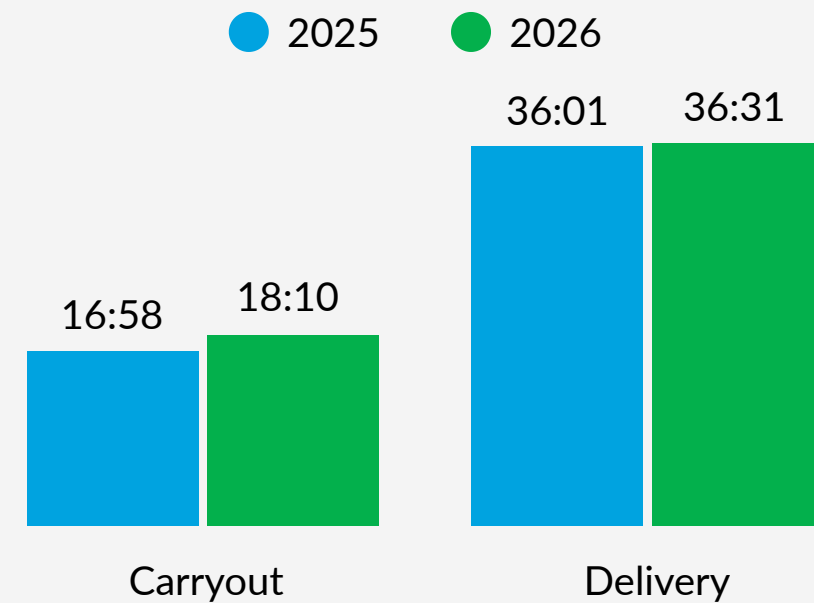
Carryout: n=308; Delivery: n=292



Total Time by Brand

Carryout continued to be the faster channel in 2026, and consumer behavior reflects this preference. According to the Popmenu Industry Study from June 2025, 44% of consumers preferred takeout, compared to 22% who preferred delivery, with speed and avoiding delivery fees noted as the top reasons.

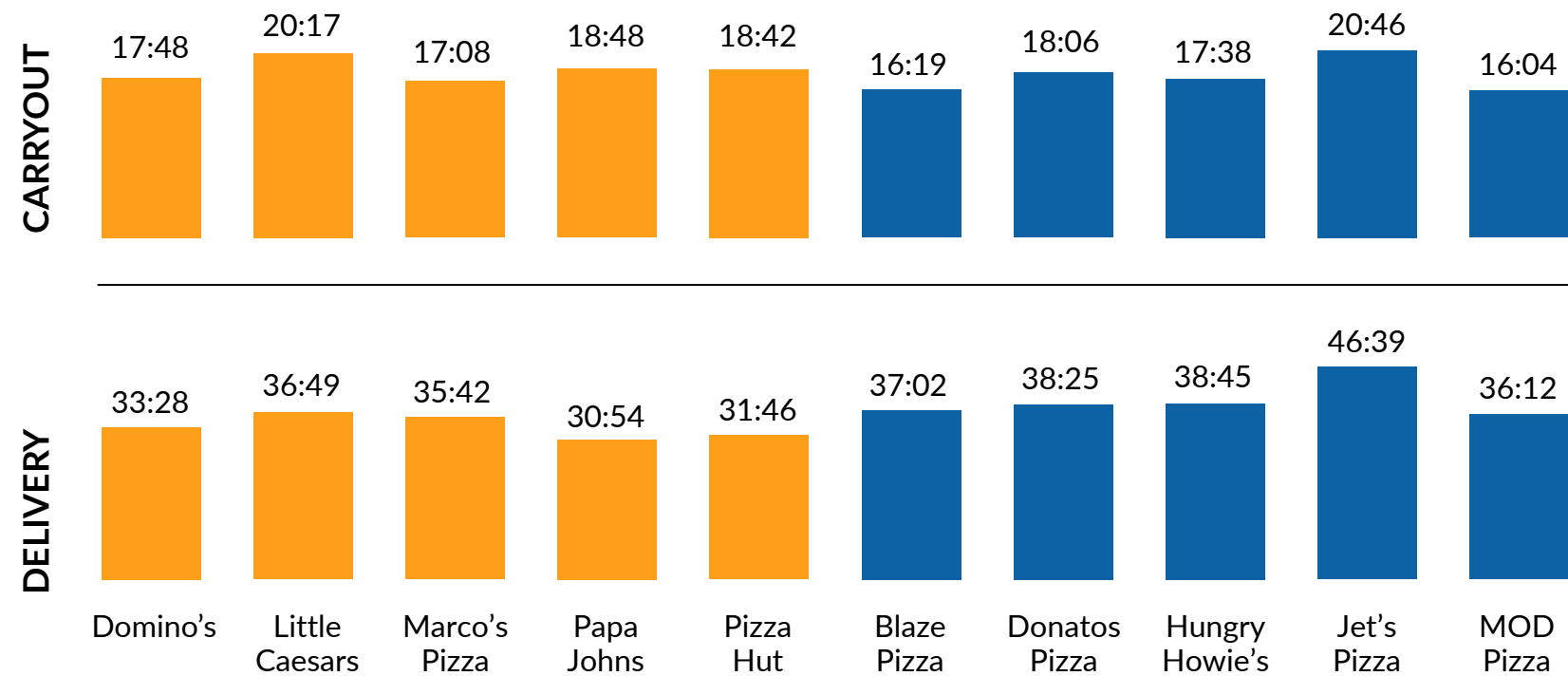
Average Total Time



Carryout: n=308; Delivery: n=292

Total Time by Brand

*All times are shown in mm:ss



n=60 per brand; 30 for carryout / 30 for delivery +/-2 per brand.



The overall carryout time increased by more than a minute year over year across the sample. Seven out of 10 brands saw increases, indicating a systemwide rise in carryout fulfillment time. Marco's, Pizza Hut, and Blaze Pizza were the only brands to reduce their total carryout time year over year.

How Long are Customers *Really* Waiting?

This year's results show a clear tipping point. Once total delivery wait times move past around 40 minutes, customer satisfaction drops quickly. Satisfied customers waited far less, while dissatisfied customers faced waits approaching an hour. The longer the delay, the sharper the decline in sentiment.



Satisfied with the
Speed of Service

31m52s

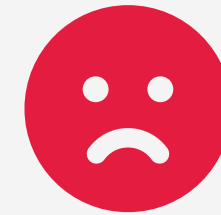
Avg. Total Time



Neither Satisfied or Unsatisfied
with the Speed of Service

44m10s

Avg. Total Time



Unsatisfied with the
Speed of Service

59m24s

Avg. Total Time

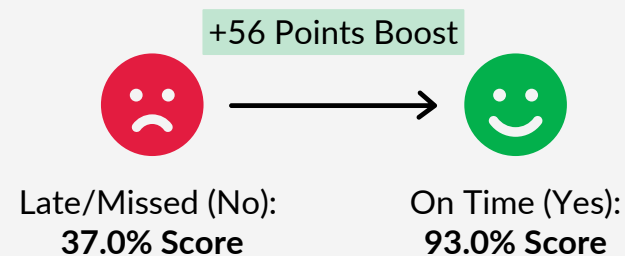
Hitting the Promised Time

Customers get a clear expectation for timing the moment they place an order, whether through the app or by phone. Adhering to that promised window plays an important role in how the experience feels. **When brands stay on time, the perception of speed improves significantly, and when they miss it, satisfaction drops fast.**

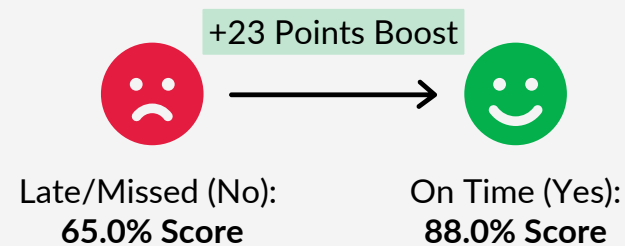
Q: Did you receive your order within the estimated preparation time?

Delivery

Speed of Service Satisfaction Score

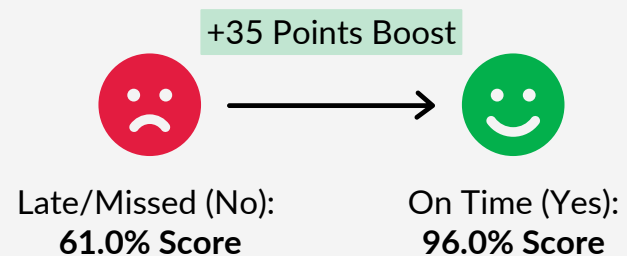


OSAT Score

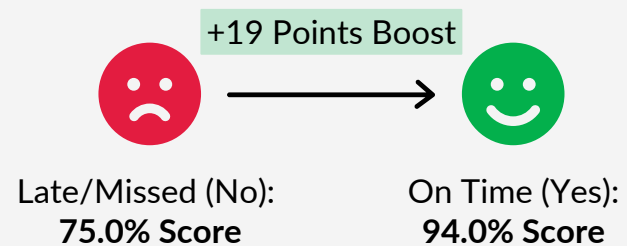


Carryout

Speed of Service Satisfaction Score

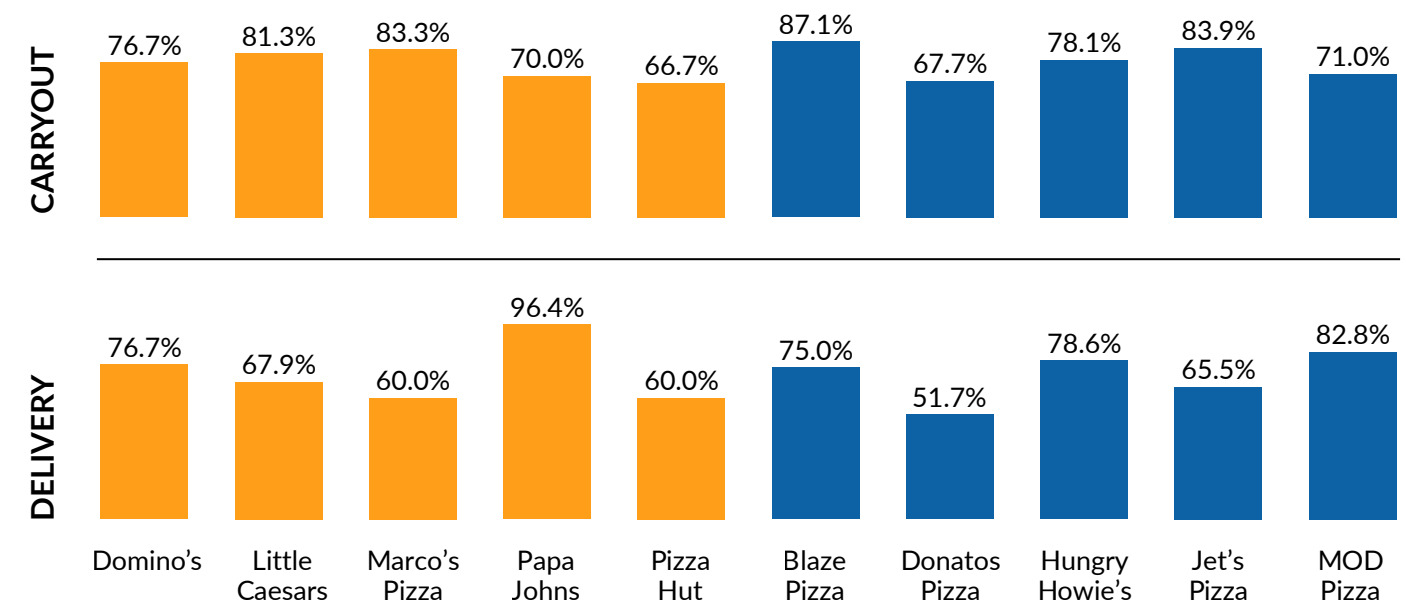


OSAT Score



Carryout: n=308; Delivery: n=292

Adherence to Estimated Time by Brand



n=60 per brand; 30 for carryout / 30 for delivery +/-2 per brand.



On-time orders drive results. Speed satisfaction jumps to 93% for delivery and 96% for carryout when brands hit the estimate.

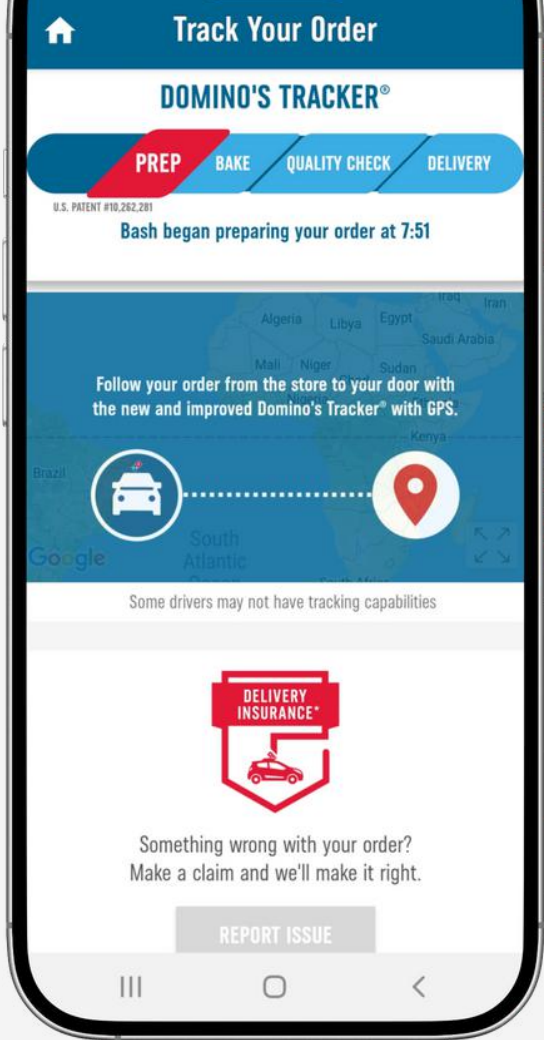


Photo source: reddit

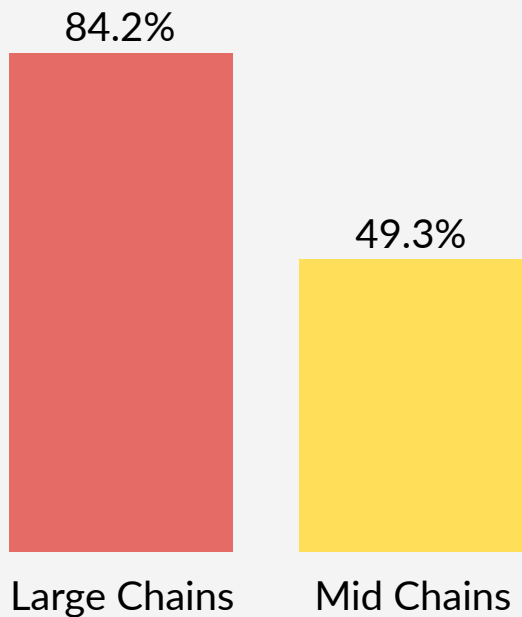
Domino’s sets the pace in real-time order tracking adoption, with Pizza Hut close behind, highlighting how quickly leading brands are moving in this space.



The Impact of In-App Order Tracking

The evaluation of real-time order tracking is new to this year’s study, offering a fresh look at how digital features influence the ordering experience.

% of Shops with Real-Time Order Tracking



Large chains w/ order tracking n=128,
Mid chains w/ order tracking n=75

Real-time tracking correlates with better delivery performance metrics. Orders with tracking delivered 10.6 percentage points higher adherence to estimated times and 6.1 points higher satisfaction with speed.

	Adherence to Estimated Time	Satisfaction with Speed of Service
Yes, the app provided real-time order tracking	79.3%	83.3%
No, the app did not provide real-time order tracking	68.7%	77.2%

Note: all orders are placed directly with the brands, not with third-party delivery partners.

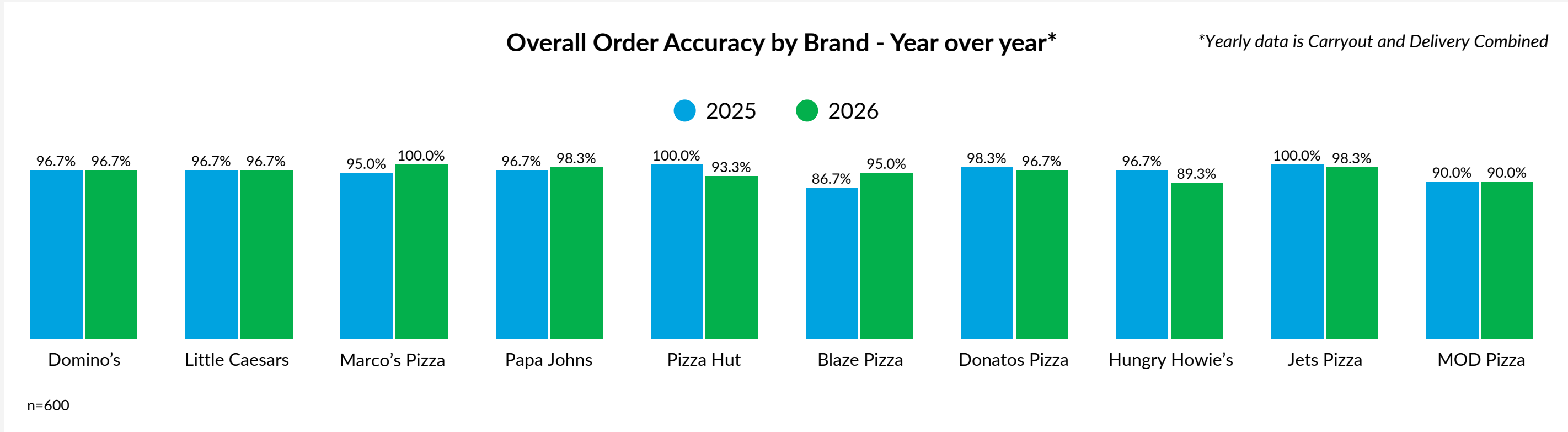
4

The Accuracy Advantage: *Getting It Right Every Time*

The Accuracy Advantage: *Getting It Right Every Time*

In a survey of 1,447 North Americans, **30% of consumers ranked order accuracy as one of the most important factors** when ordering pizza for delivery, just one point behind getting it piping hot (31%). With accuracy sitting this high on the priority list, even small mistakes carry real weight.

Accuracy is also shifting as ordering methods change. With more automated phone systems and varied workflows across brands, some operators are improving precision while others are creating new gaps.



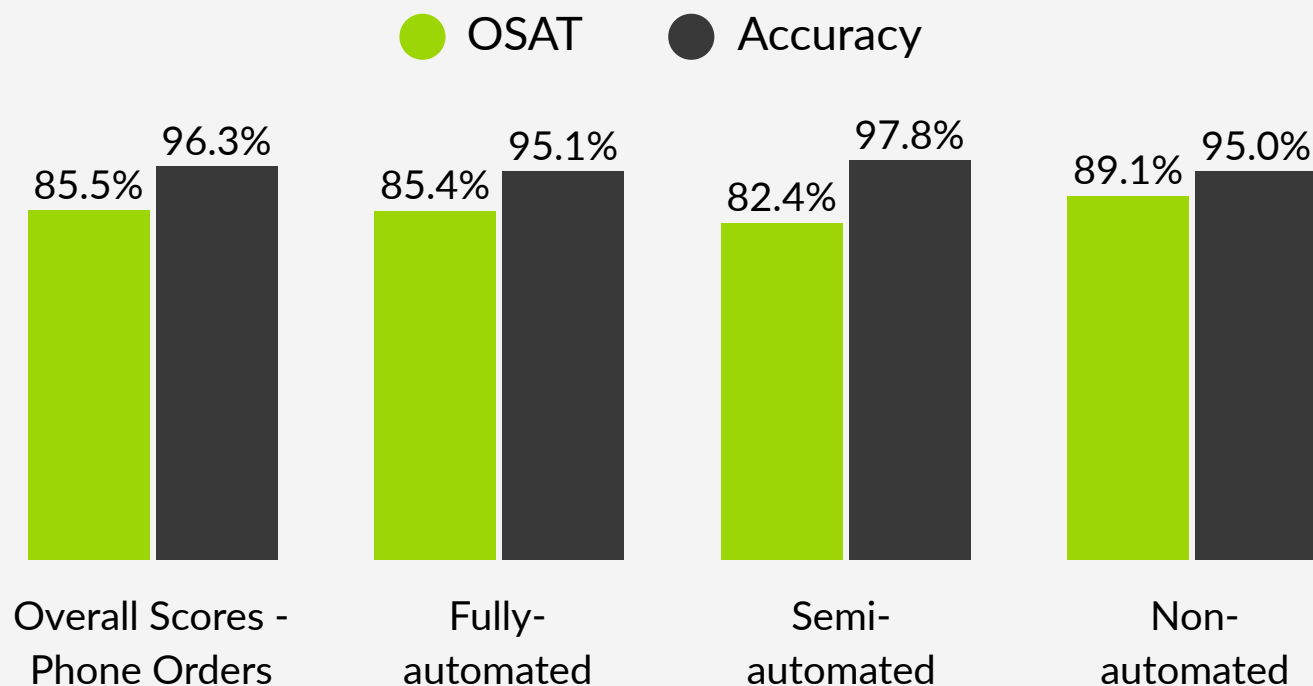
Impact of Automation on OSAT and Accuracy

QSR Magazine reports that adoption of automated phone systems is accelerating as operators look for ways to handle higher call volumes and ongoing staffing shortages.



Systems with automation improved accuracy year over year and frequency of automation increased alongside: **Semi-automated calls rose from 41% to 46%, and fully automated from 9% to 14%.** OSAT remains 5.7 percentage points lower when automation is involved.

OSAT and Order Accuracy Scores



Fully-automated call: n=41; Semi-automated call: n=136; Non-automated call: n=119

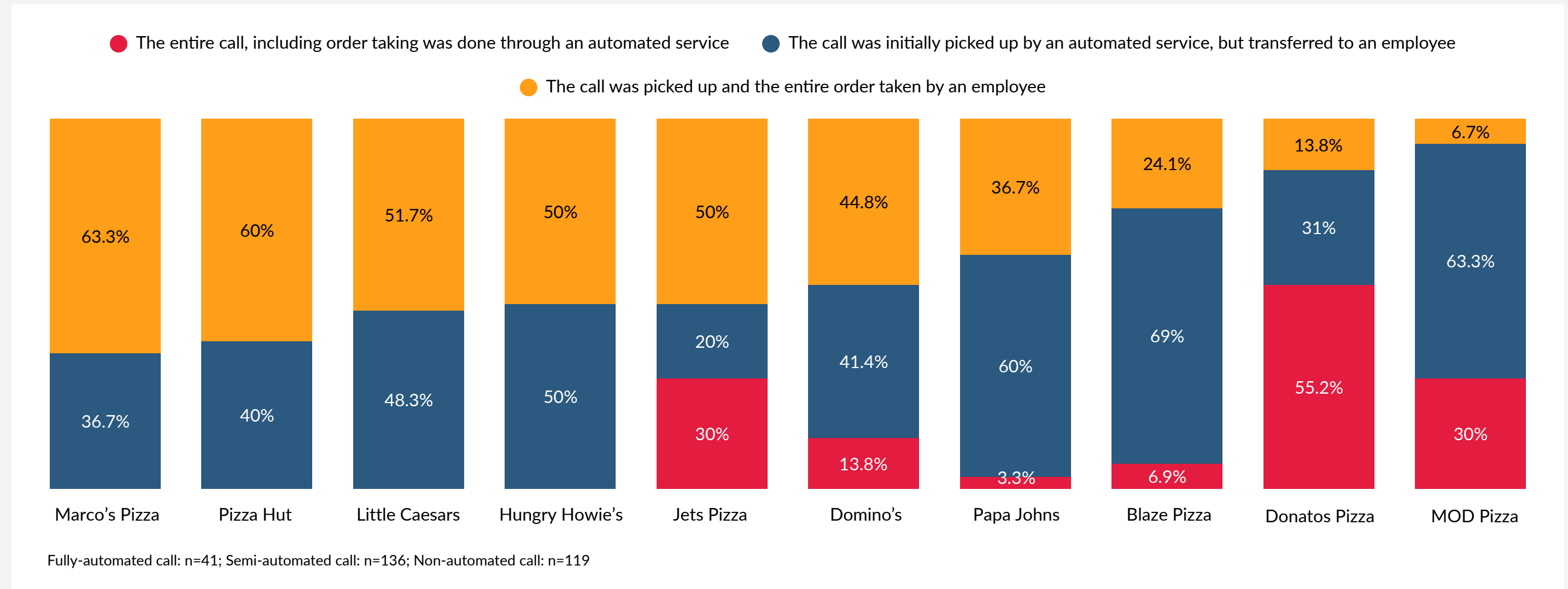
Shoppers were asked to categorize their phone orders using the following options:

- Fully-automated: The entire call, including order taking was done through an automated service
- Semi-automated: The call was initially picked up by an automated service but transferred to an employee
- Non-automated: The call was picked up and the entire order taken by an employee



Automation of Phone Orders by Brand

Phone automation looks very different brand to brand. Donatos, MOD, and Jets lead in fully automated calls, with Donatos making the biggest leap from no automated calls last year. After using some fully automated systems in 2025, Pizza Hut, Little Caesars, and Hungry Howie's opted for semi-automated or fully employee-based systems this year.



5

Friendly Faces, Familiar Places: *The Human Side of Pizza Service*

Friendly Faces, Familiar Places: *The Human Side of Pizza Service*

A smile. A quick acknowledgement. A tone that feels warm rather than rushed. These simple human moments carry real weight. **In fact, a pleasant and friendly carryout interaction ranked as the second-highest correlation to OSAT in this year's study.**

Customer comments reinforced the point, with a Friendly and Professional Delivery or Service Interaction emerging as the most memorable moment of the entire experience.

Breakdown of Carryout OSAT Score by Pleasant vs. Unpleasant/Neither Pleasant nor Unpleasant

95.2%

Pleasant

65.5%

Unpleasant/Neither
Pleasant nor Unpleasant

Q: How would you describe your experience picking up your order in-store?

n=308

"My most memorable part was the friendly ordering service. The employee had a pleasant, calm voice and made the ordering process quick and easy."

- Mystery Shopper

"The customer service was exceptionally good. All staff members were friendly, helpful, and engaging. I was most impressed by the interactions with the employees."

- Mystery Shopper



Overall Satisfaction, including both Carryout and Delivery was 28.8 percentage points higher when the service received was friendly compared to when it was rated not friendly.

Order Taker Friendliness

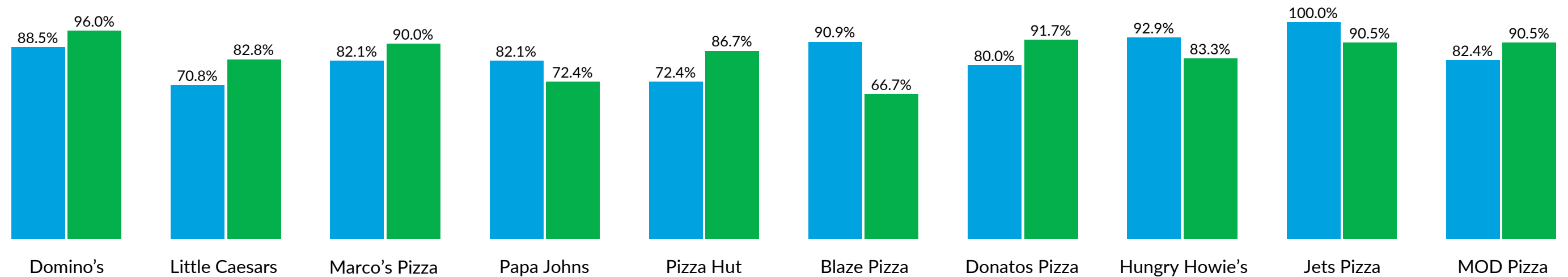
% rated as 'Friendly'



Large Chains: n=300; Mid Chains: n=300

Ordering friendliness shifted across the category this year, with some brands strengthening early interactions while others slipped.

● 2025 ● 2026



*Yearly data is Carryout and Delivery Combined

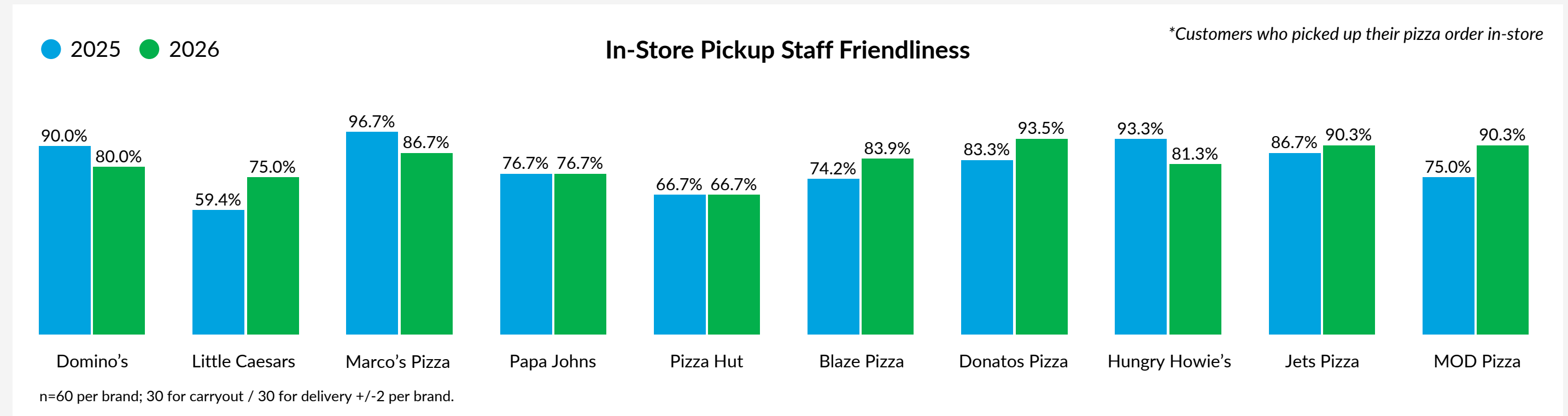
n=60 per brand; 30 for carryout / 30 for delivery +/- 2 per brand.

In-Store Pickup Staff Friendliness

% rated as 'Friendly'



Large Chains: n=300; Mid Chains: n=300



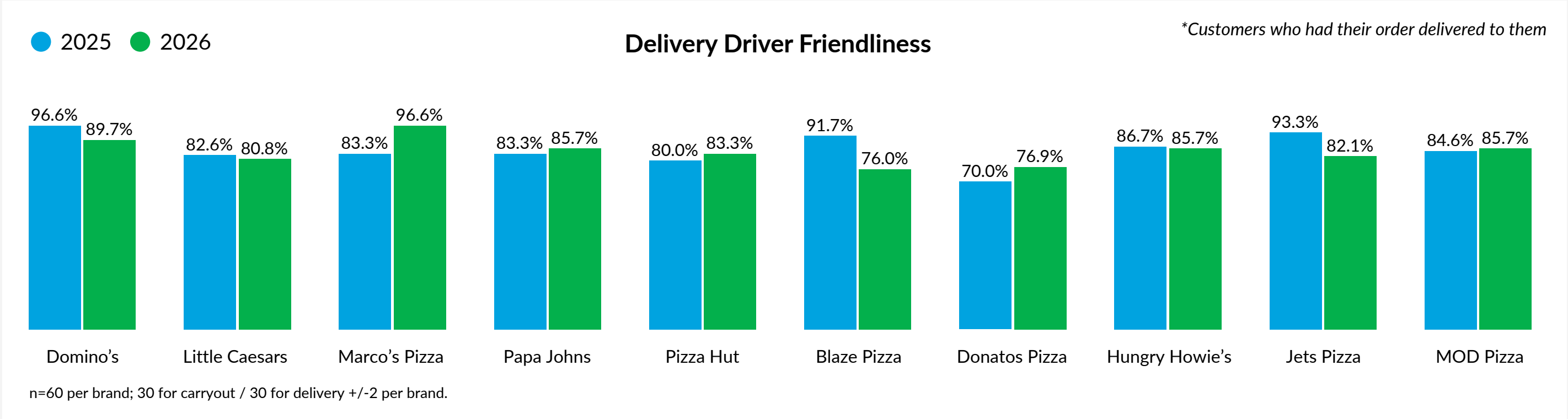
Delivery Driver Friendliness

% rated as 'Friendly'



Large Chains: n=300; Mid Chains: n=300

Delivery driver friendliness varied widely, with large-sized chains showing stronger delivery interactions.



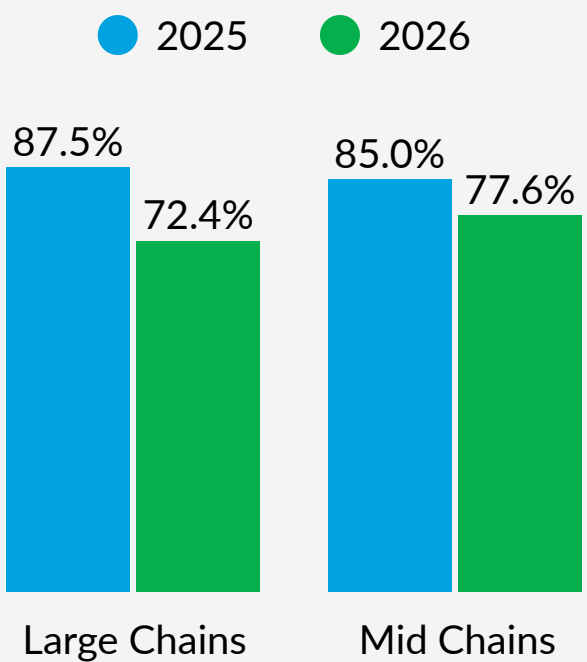


Staff Attentiveness

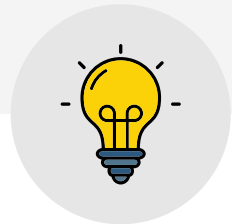
Attentiveness dropped year over year for both large and mid-sized brands, with several chains showing noticeable declines in engaged, device-free service.

% of Shoppers that said 'Yes'

Q: Was the staff member that served you attentive during your interaction?



Large Chains: n=300; Mid Chains: n=300



What makes an employee seem attentive?

Consumers say these actions stand out most:

Confirms (or double-checks) the order before handing it over — 64%

Greets and acknowledges the guest quickly — 62%

Interacts in a warm, friendly, and personable way — 43%

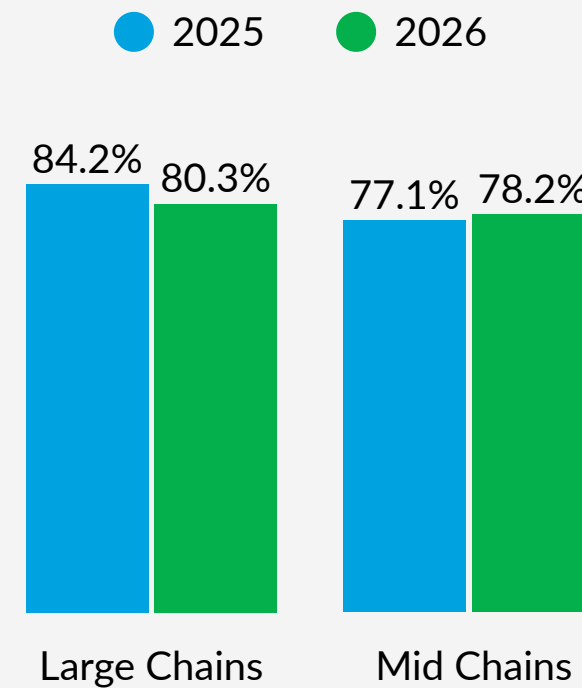
n=1,447

Acknowledgement Upon Entering

Small gestures like greeting and eye contact continue to shape carryout experiences.

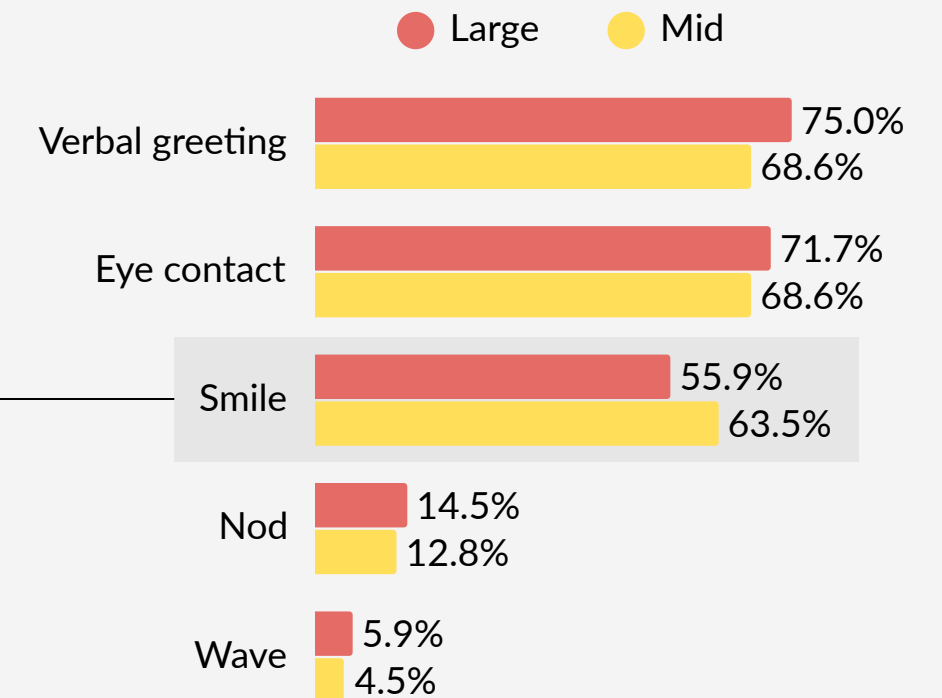


% of Customers Greeted Upon Entering



Carryout Large Chains: n=152;
Carryout Mid Chains: n=156

How customers were greeted



'Smile' saw the biggest shift year over year, dropping for large chains but rising significantly for mid-sized brands.

6

When Quality Leads:

How Great Flavor Builds Loyalty

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How Great Flavor Builds Loyalty

Quality and taste lead the decision-making process, with 66% of consumers naming it the top factor when choosing where to order. Food quality is also the strongest driver of overall satisfaction in this year's study, making it a key part of the pizza experience.



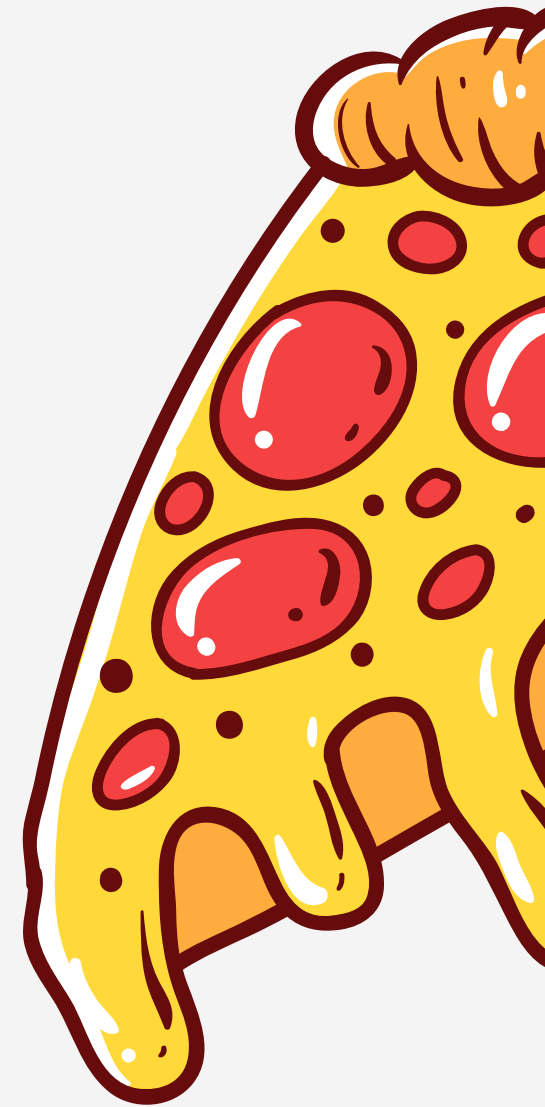
Overall Satisfaction was
53.8 percentage points higher
when the pizza was warm compared
to when it was not.



Overall Satisfaction was
56.7 percentage points higher
when the pizza was cooked as expected vs.
overcooked/burnt and 26 percentage points
higher vs. undercooked.



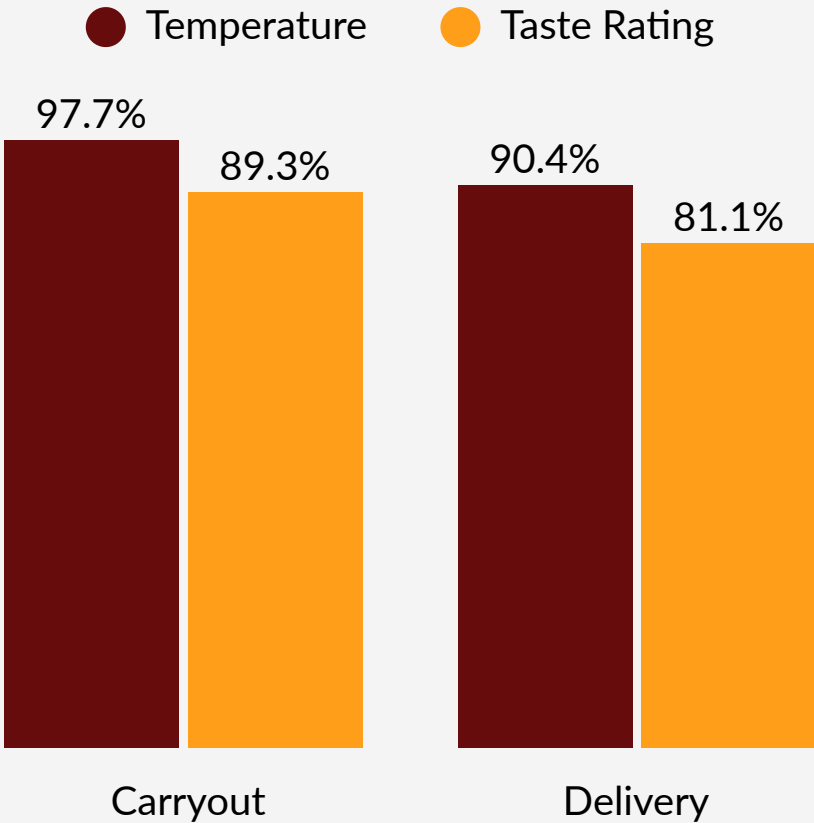
Overall Satisfaction was
49.8 percentage points higher
when the pizza's taste was rated 4 or 5
(out of 5) vs. when it was not.



The Temperature-Taste Gap

Delivering a warm pizza is not enough. Taste scores still drop in delivery compared to carryout, even when shoppers say the pizza arrived warm, showing that **temperature alone doesn't protect flavor**.

% Scores for Temperature and Taste Rating



Carryout: n=308; Delivery: n=292



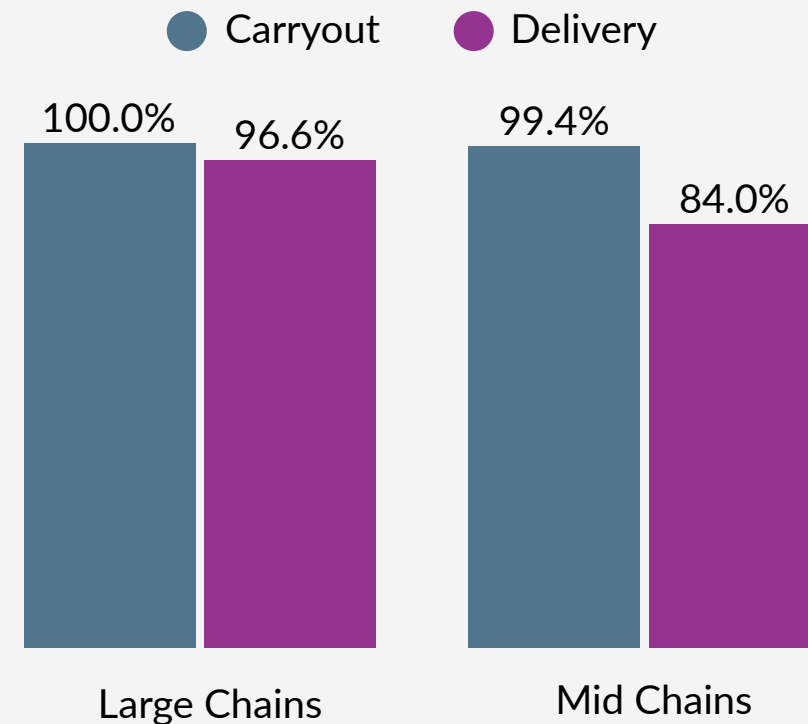
This highlights a critical operational challenge: the delivery process itself is impacting perceived quality, and temperature control alone is insufficient to ensure the highest flavor scores.



Food Temperature by Brand

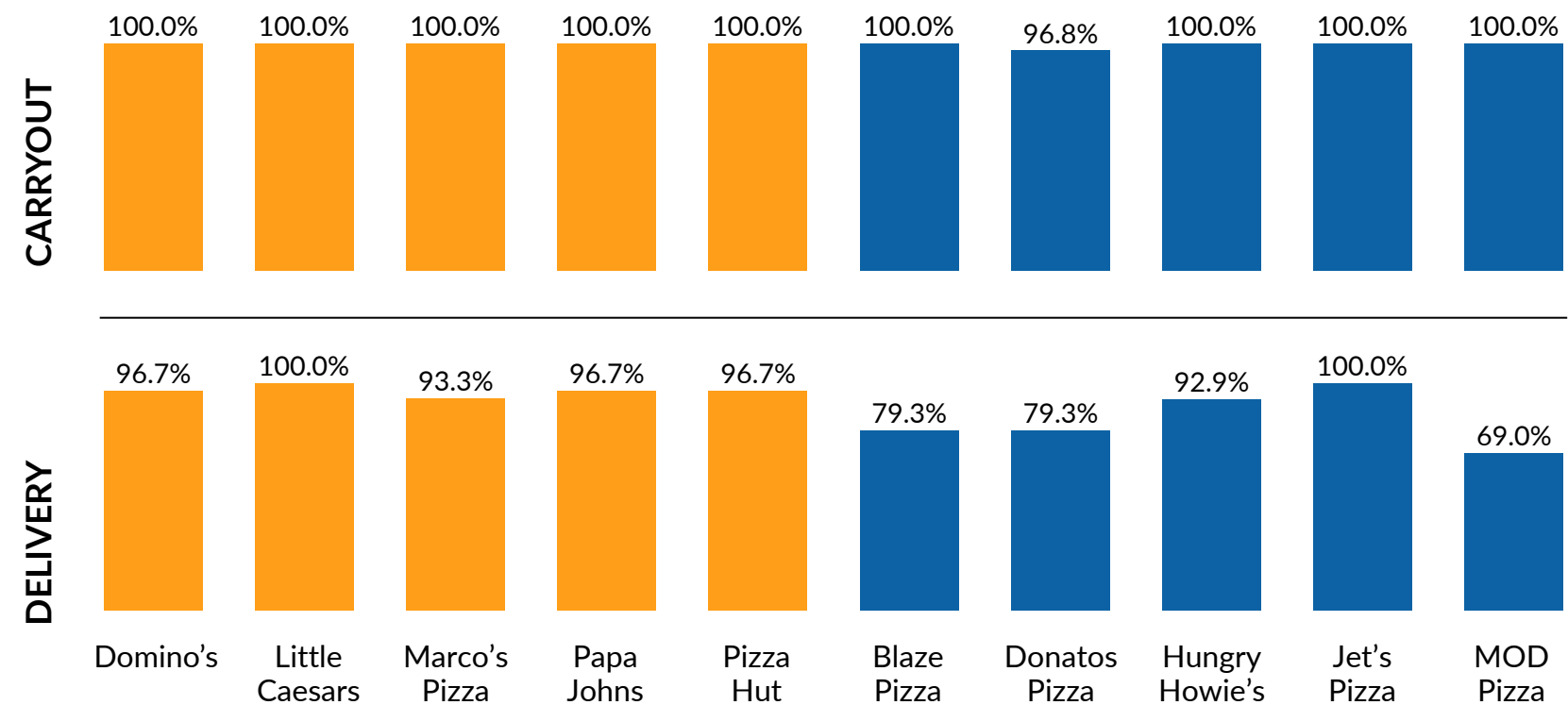
Food temperature holds steady in carryout across nearly every brand, but delivery introduces much wider variability, especially for mid-sized chains and **those relying heavily on third-party drivers.**

Food Temperature Scores



Large Chains: n=300; Mid Chains: n=300

Food Temperature by Brand

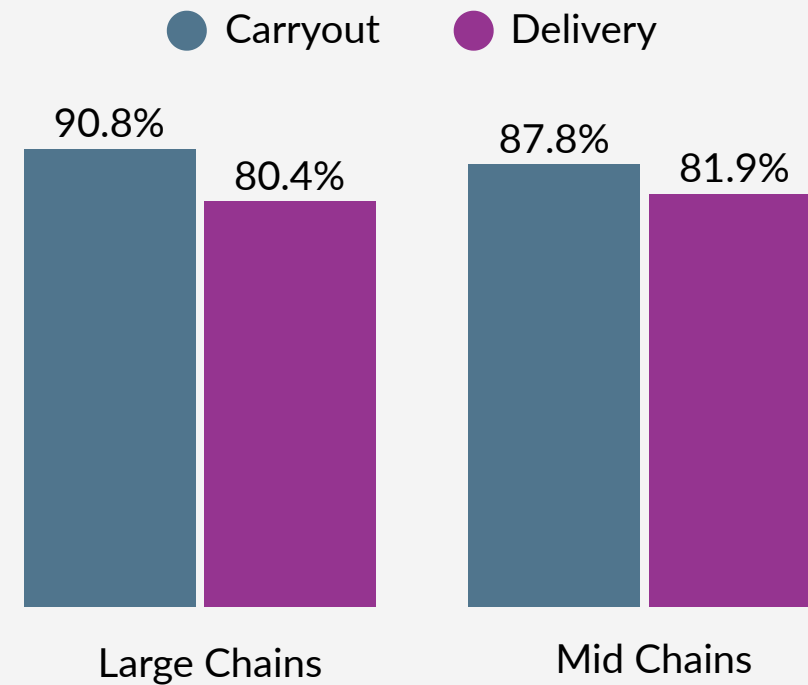


n=60 per brand; 30 for carryout / 30 for delivery +/-2 per brand.

Pizza Taste Rating

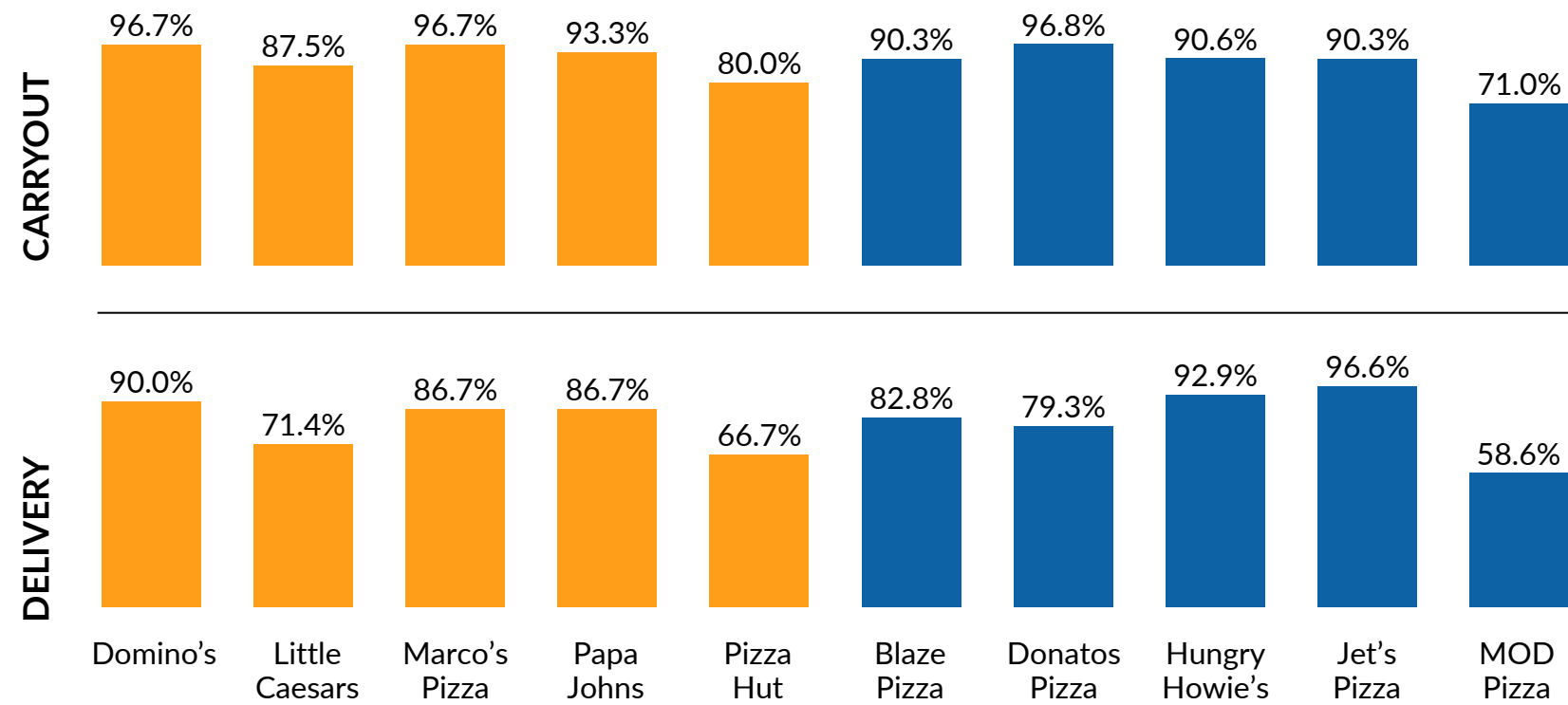
Taste consistently declines during delivery across almost the entire category, even when pizzas arrive warm, showing that temperature control alone isn't enough to protect flavor.

% of Customers who rated the
Taste 4 or 5 (out of 5)



Large Chains: n=300; Mid Chains: n=300

Pizza Taste Rating by Brand



n=60 per brand; 30 for carryout / 30 for delivery +/-2 per brand.



Satisfied by the Slice:

How Execution Shapes the Experience

Satisfied by the Slice:

How Execution Shapes the Experience

Quality. Taste. Time. They're the pillars of the pizza experience, and they drive the biggest lifts in satisfaction across the entire study.

Top Satisfaction Drivers:

TEMPERATURE

Overall Satisfaction was 53.8 percentage points higher when the pizza was warm compared to when it was not.

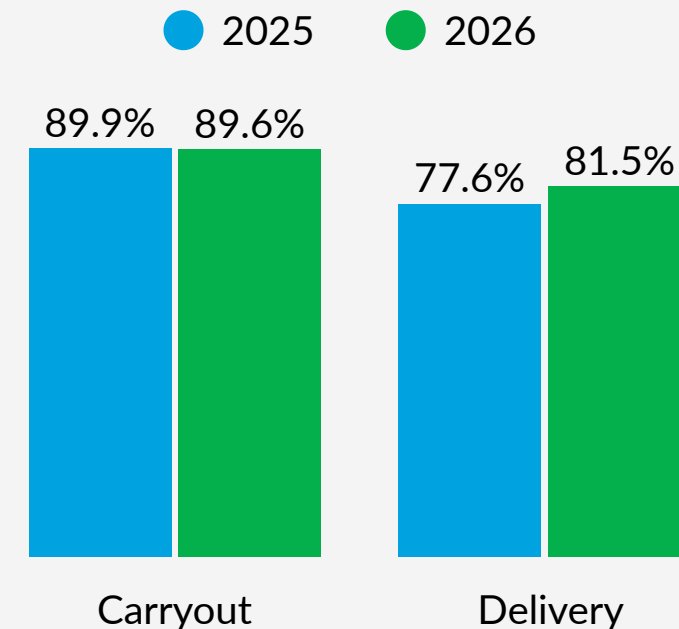
TASTE

Overall Satisfaction was 49.8 percentage points higher when the pizza's taste was rated 4 or 5 (out of 5) compared to when it was not.

TIME

Overall Satisfaction was 49.8 percentage points higher when the customer was satisfied with the speed of service compared to when they were not.

% that said 'Yes' Satisfied



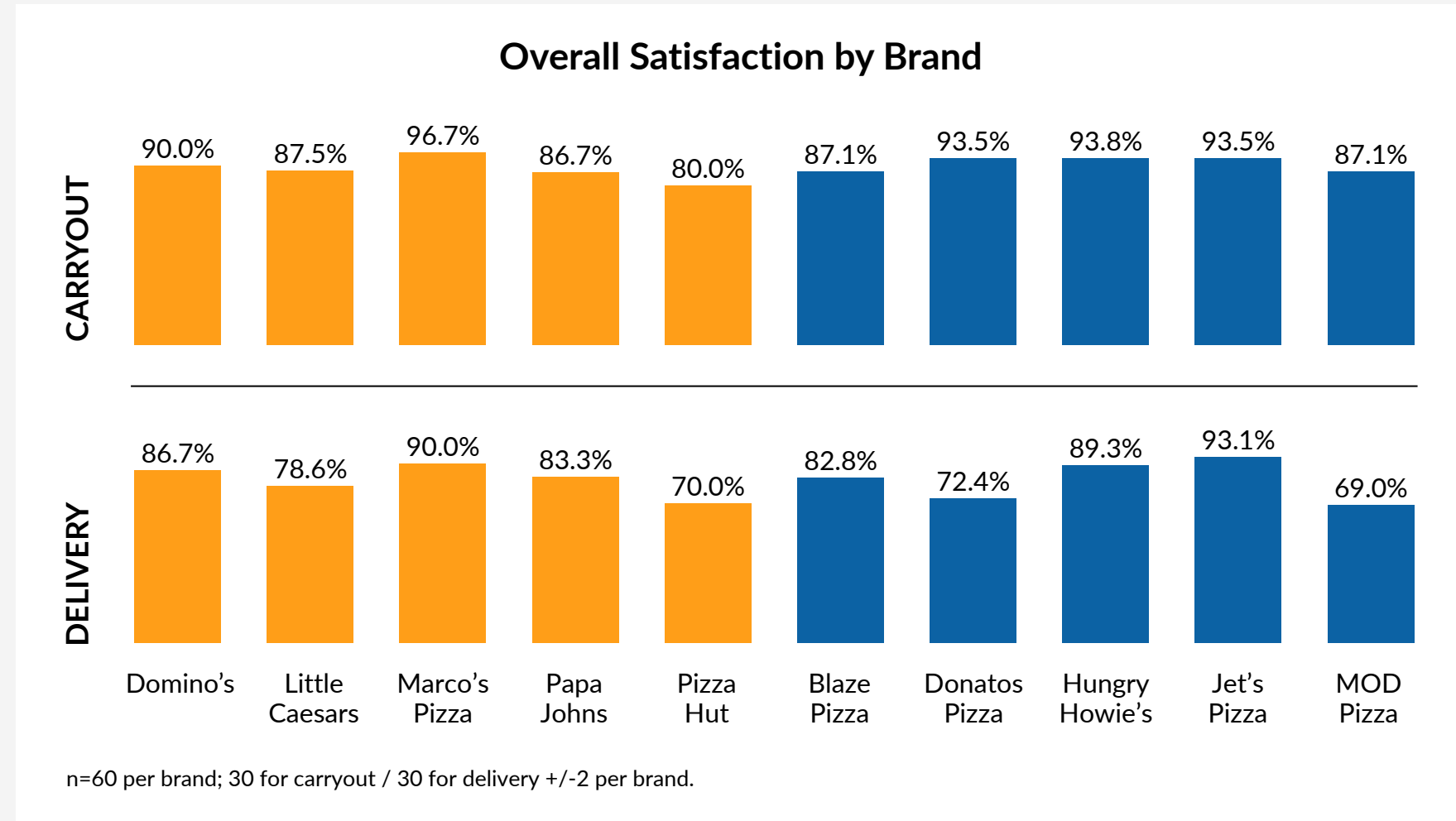
Carryout: n=308; Delivery: n=292

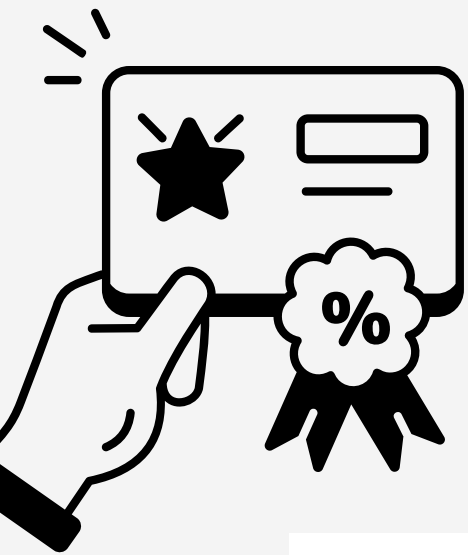


Delivery satisfaction is still behind carryout, but it made a meaningful jump year over year.

Overall Satisfaction by Brand

Brand performance varies widely, but Marco's, Jet's, and Hungry Howie's stood out with strong results in both carryout and delivery.





Loyalty's Role in the Satisfaction Story

To better understand how loyalty programs show up in the pizza ordering journey, we conducted 20 additional mystery shops focused on promotion, enrollment, and follow-up communication. With 70% of consumers saying loyalty programs influence where they order, visibility matters.

Loyalty Program Health Check



90%

of shoppers were **Satisfied**
with the **Redemption**
Method concept



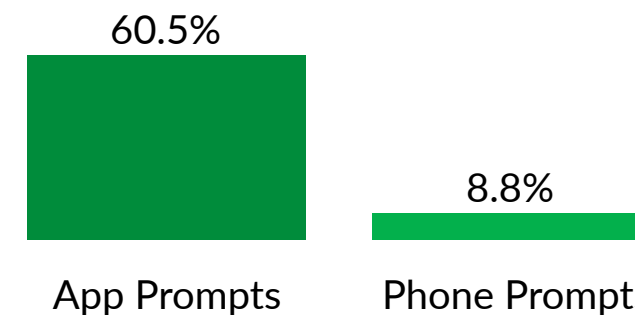
90%

of the app orders
Recognized the
Shopper upon login

What does this indicate about loyalty program adoption? Shoppers are satisfied with the concept of the loyalty program, and apps are successfully recognizing and enrolling members.

The Loyalty Visibility Gap: App vs. Phone

Q: "Were you prompted to join or use a loyalty program during your order/pickup/delivery?"



There is an opportunity to examine how to integrate the loyalty prompting within that phone experience, especially in with automated systems or at call-centers to boost that participation rates.

Loyalty's Role in the Satisfaction Story



Post Enrollment Experience

Low Rate of Personalization

35%

were offered
tailored promotions

Generic Communication

80%

received generic
promotional emails
(avg. 2.3 emails)

How effectively are brands using post-enrollment communication to support ongoing engagement? Moving beyond basic email blasts toward more relevant, tailored messaging may play a role in strengthening member relationships.

Shopper Comments

On Value: “I have not been able to discover any information about the [Brand] rewards programs. It doesn't show me anything regarding the points I have earned.”

On Incentive: “I would recommend that the offer be made at the beginning of the purchase, versus having to make a purchase first and then receiving the offer.”



8

Control vs. Convenience: *First-Party vs. Third-Party Delivery*

Control vs. Convenience:

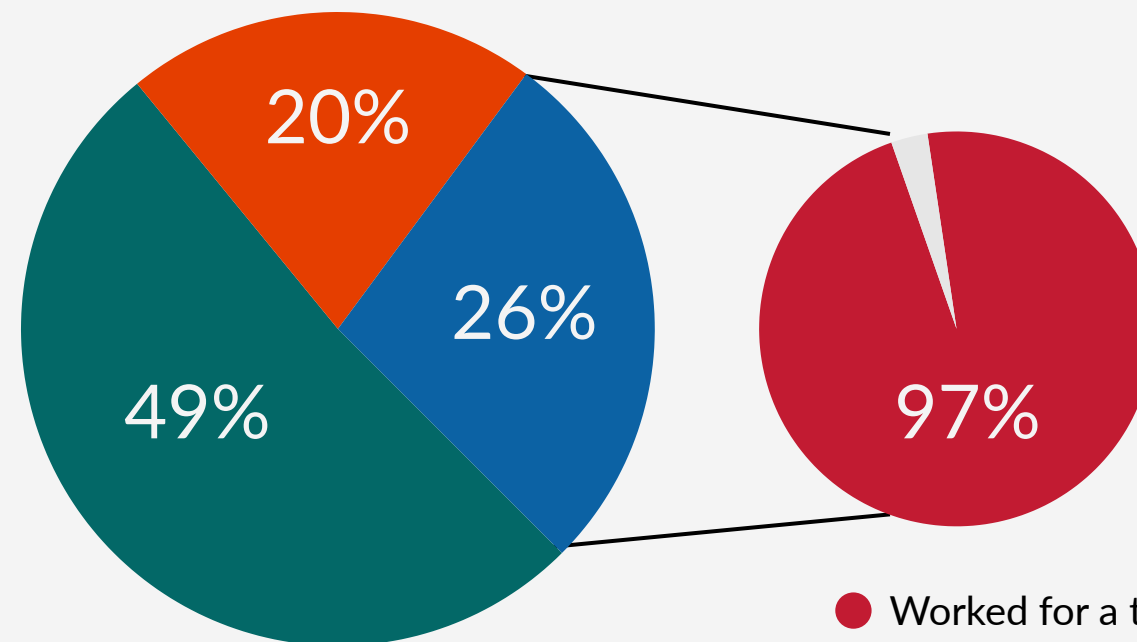
First-Party vs. Third-Party Delivery

Shoppers were asked to identify whether their delivery came from a brand driver or a third-party partner. It's important to note that all orders were placed directly with the brand, not through third-party delivery platforms. Observations varied widely, creating a clear view of how differently brands approach delivery.

Frequency of Outsourcing Delivery

Q: Could you identify if a delivery driver worked directly for the brand?

- Yes, worked for the pizza chain
- Unclear, there was nothing identifiable on the individual or the car
- No, worked for a brand other than the pizza chain ordered from



● Worked for a third-party delivery company

74 Orders: 25% of orders delivered by third-party delivery drivers.

Delivery: n=292

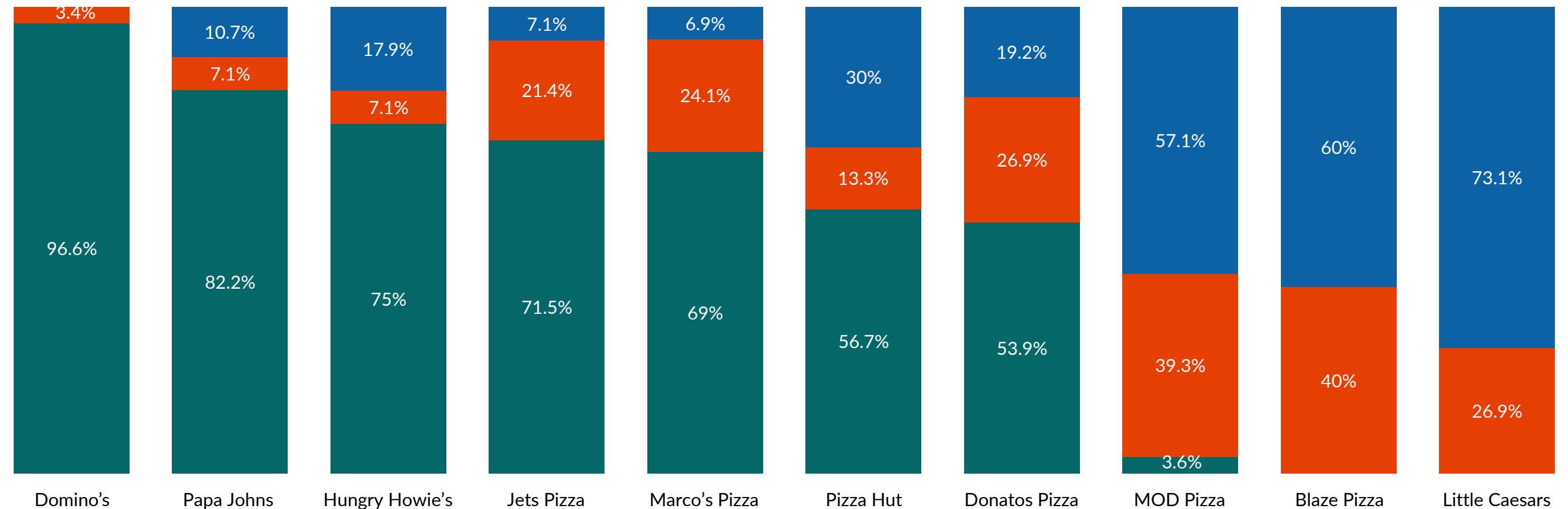


Of the 26% of orders that were delivered by a driver who did not work for the brand, **97% of those orders were delivered by a third-party delivery driver.**



Breakdown of Driver Type by Brand

● Yes, worked for the pizza chain
 ● Unclear, there was nothing identifiable on the individual or the car
 ● No, worked for a brand other than the pizza chain ordered from



n=277

*This excludes the 15 shops where the shopper had no interaction with the driver.

Impact of Third-Party Delivery

To understand how third-party delivery impacts the customer experience, brands were grouped based on what our shoppers observed:

- Never observed to use third-party delivery
- Occasionally used third-party delivery
- Frequently used third-party delivery

Never Observed to Use Third-Party Delivery



Occasionally Use Third-Party Delivery



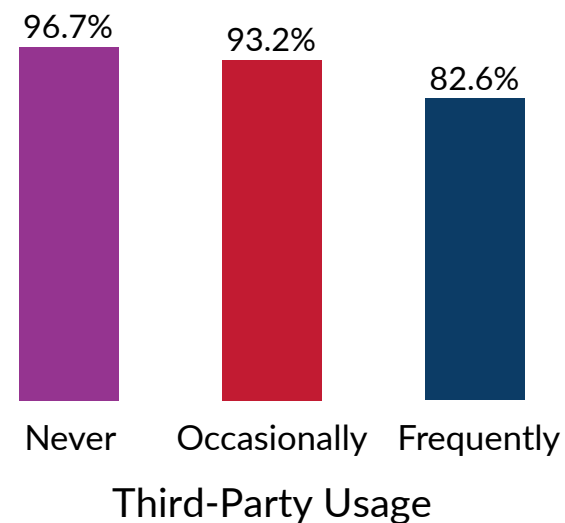
Frequently Use Third-Party Delivery



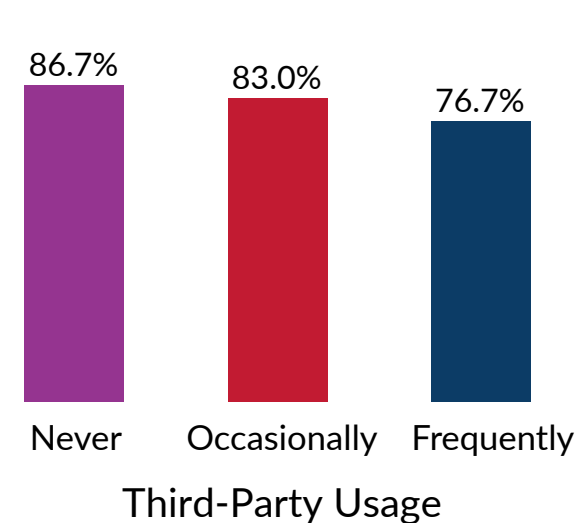
Impact of Third-Party Delivery on Key Metrics

Similar to the results seen in 2025, the use of third-party delivery partners has a negative impact on the three following metrics: Temperature, OSAT, and Total Time.

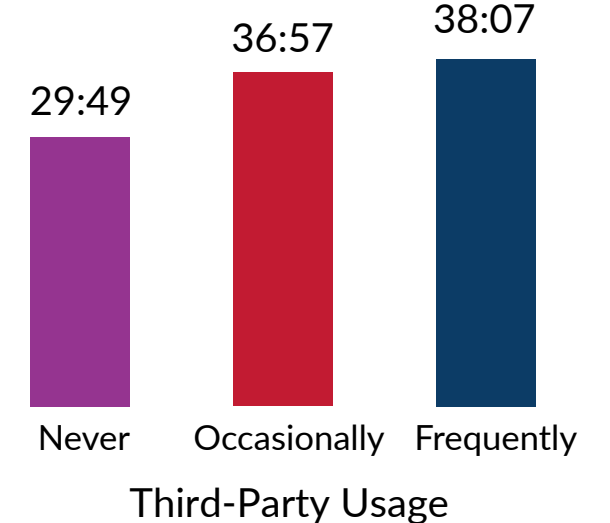
Food Temperature Scores



OSAT Scores



Total Delivery Time



Delivery: n=292

Never observed to use third-party: n=30; Occasionally use third-party: n=176; Frequently use third-party: n=86



Outsourced Delivery: The Insulated Bag Factor

Among the 74 orders delivered by clearly identified third-party drivers, the type of bag used played a major role in how warm the pizza arrived.

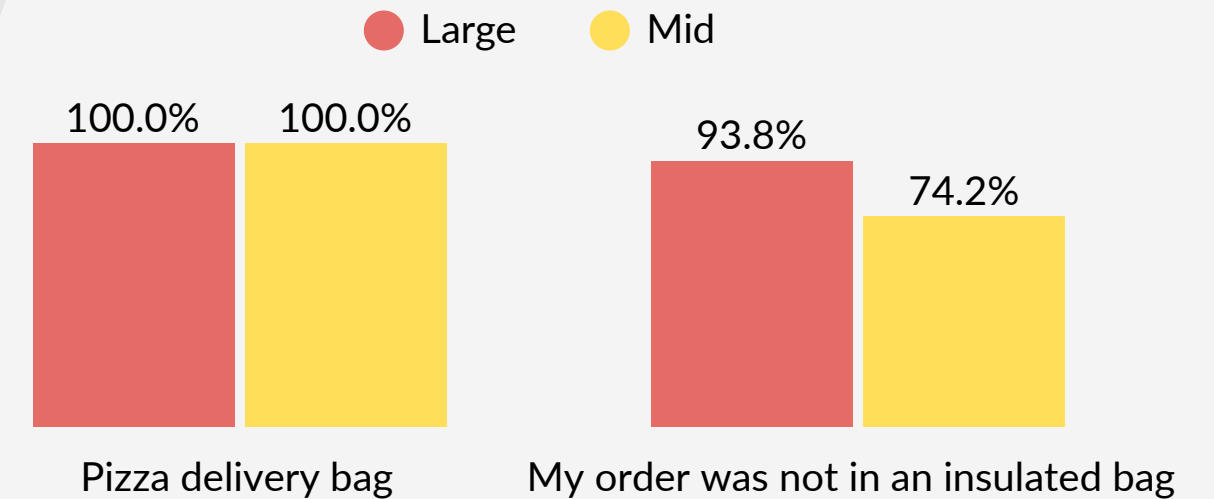


Mid Chains face greater temperature risk due to **higher third-party delivery reliance and longer delivery times**. When third-party delivery drivers do not use insulated bags, Mid Chain deliveries average 39:35 minutes compared to 34:04 for Large Chains, making it harder to maintain food warmth.



Food Temperature Scores

Q: Was the pizza warm when you received it?



Large Chains: n=300; Mid Chains: n=300

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Where Pizza Goes from Here:

Your 2026 Playbook

Where Pizza Goes from Here: *Your 2026 Playbook*

The 2026 landscape is clear: quality, execution, and consistency are where brands will win. Mid-sized chains closed the satisfaction gap with industry giants, suggesting that disciplined operational focus can create meaningful gains regardless of scale.

For mid-sized operators, this year's results point to the continued importance of protecting food quality and managing the delivery handoff. Temperature and taste had the strongest impact on satisfaction, and the data shows how easily these can drop when insulation or delivery routines falter.

For large chains, the findings highlight shifts in areas that have traditionally been strong. The decline in in-store attentiveness and differences in digital ordering performance suggest opportunities to reinforce the service moments and accuracy systems that shape the guest experience.

Across both segments, the correlations are consistent: small operational details influence how customers perceive the entire journey. These patterns offer operators a clear view of where focused refinements can create meaningful lift.

Intouch offers a range of solutions to help brands achieve operational excellence, so they can earn customers for life.



Start by listening closely to what customers are experiencing. Whether it is pizza temperature, order accuracy, or how smooth the ordering process feels, each response offers insight into what is working and where expectations are shifting. With **IntouchSurvey®**, you can capture this feedback in real time and understand how sentiment changes across channels, locations, or new operational changes.

Next, make sure the fundamentals behind those experiences are consistently delivered. **IntouchCheck®** replaces paper processes with mobile-first checklists, giving teams an easy way to monitor standards in the moment and helping operators spot small gaps before they impact guests.

Then, pair that insight with a true view of how your standards play out in the field. **IntouchShop®** helps you see the full journey through a customer's eyes, from the moment an order is placed to the moment the pizza is handed off. A strong mystery shopping program reveals how well service, quality, and consistency are delivering on your brand promise.



About Intouch Insight

Intouch Insight is a CX solutions and mystery shopping company specializing in helping multi-location brands achieve operational excellence, exceed customer expectations, and build long-term customer loyalty. We are proud to deliver growth solutions to over 300 of the world's most beloved brands.

Our solutions are designed to streamline operations, maintain brand standards, and provide actionable insights to help our clients enhance their CX. With over 40 years of CX expertise, we excel in providing our clients with top-notch CX, customer surveys, mobile forms, mystery shopping, as well as operational and compliance audit solutions.

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