

NINE EUVRARD & MARINE LALANDE

# NEW CONSUMER HABITS

with the rise of delivery services in the catering industry.

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March 8th, 2022

# INTRODUCTION

## WHAT IS A FOOD DELIVERY SERVICE?

*Service that sends customers fresh or frozen, prepared **meals** delivered to their **homes** and **offices**.*

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# OUR MENU



## CONSUMER LEVEL

Evolution of uses & causes  
Consumer profile

## IMPACTS ON RESTAURANT OWNERS

Limits and criticisms  
Benefits

## OTHER MARKET PLAYERS

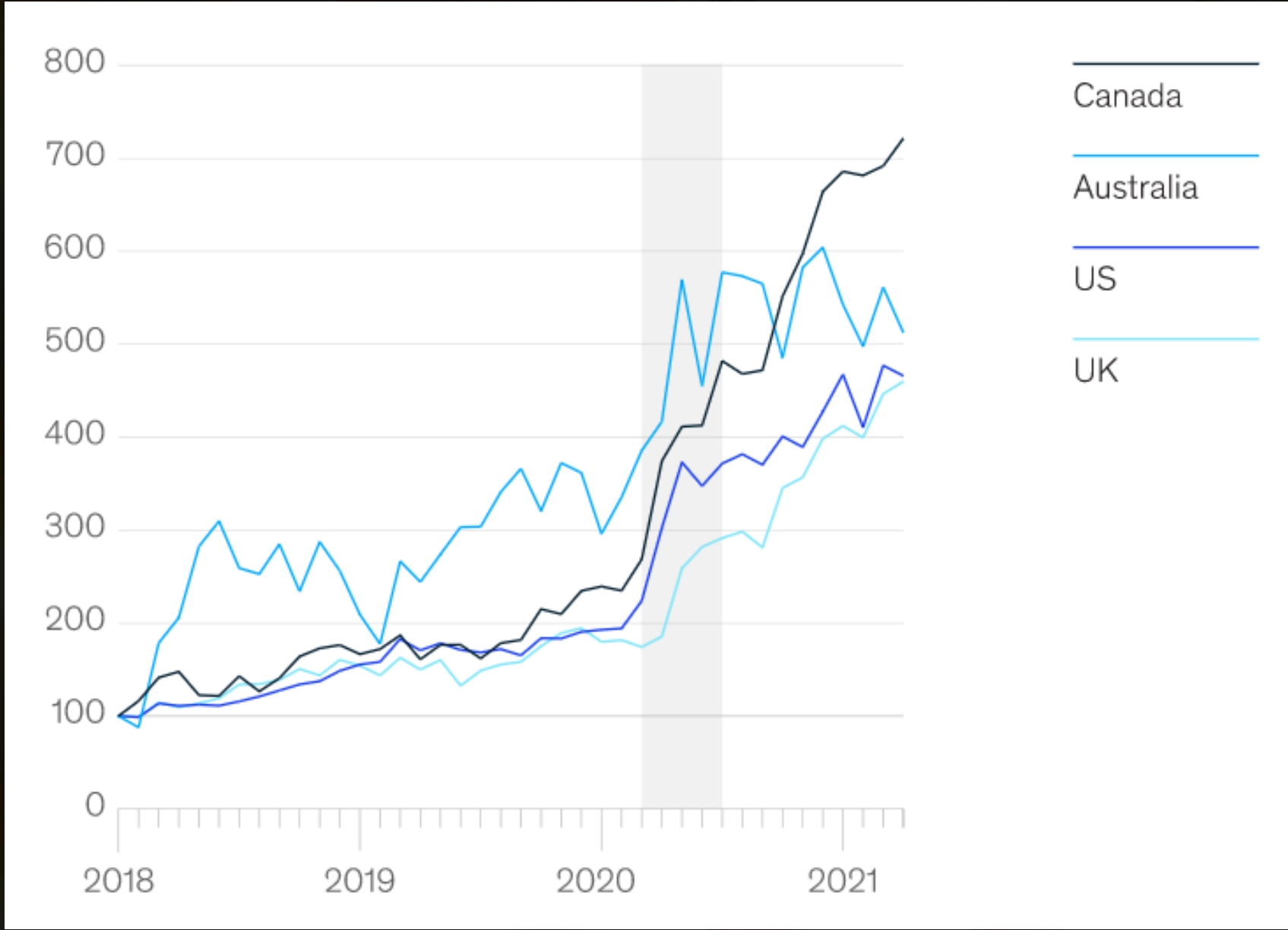
The main delivery companies  
Alternative businesses

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# CONSUMER LEVEL

## EVOLUTION OF USES & CAUSES

### Market evolution in volume



2021: \$150 billion

A 20% rise

2030: \$365 billion

Closures and physical distancing requirements

Generation Y consumers

Source: Edison Trends



# CONSUMER LEVEL

## CONSUMER PROFILE

### DEMOGRAPHIC

18-34 year olds

Male

Urban

1 person household

### BEHAVIOR

64% are very satisfied with their last order

Average ticket: **16€** for lunch & **17€** for  
dinner

### INCOME

Average revenue per user:  
\$175.81



# CONSUMER PROFILS-CONTINUATION

## WHAT ARE THEY ORDERING?



Pizza in 40 countries



Chinese food in 29 countries



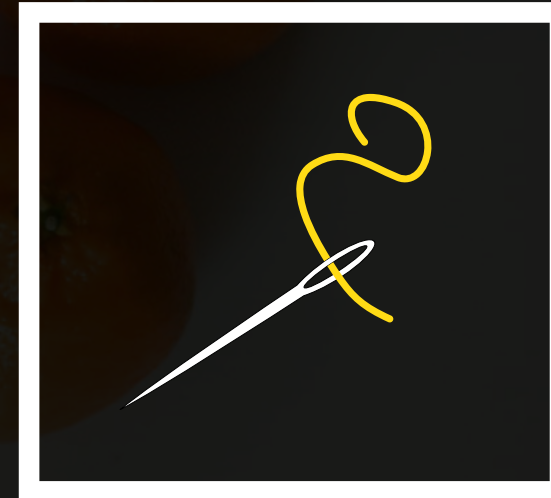
Sushi in 10 countries



# CONSUMER PROFILS-CONTINUATION



Variety



Customisation



Rapidity

Their expectations





# CONSUMER PROFILS-CONTINUATION

Their needs

47%

Satisfying a craving

33%

Treating themselves

30%

Trying new things



# CONSUMER PROFILS-CONTINUATION

The decision-making process

**90%**

Of customers conduct **online research** before choosing a restaurant.

**Several search engine**

Online consumer and media reviews  
Media channels

**Final factor**

Food preferences  
Budget

# IMPACT ON RESTAURANT OWNERS

## LIMITS & CRITICISMS



Commission fees of third-party delivery apps are quite substantial:

between **20%** and **30%** commission for each order



Less control over a customer's experience with third-party delivery:  
cold order - poor condition -  
poor service

## BENEFITS



Job opportunities for many people across a range of types of employment:  
**chef - delivery people ...**



Reach new customers outside of the regulars, locals. By offering delivery, restaurants are able to serve a wider range of customers.



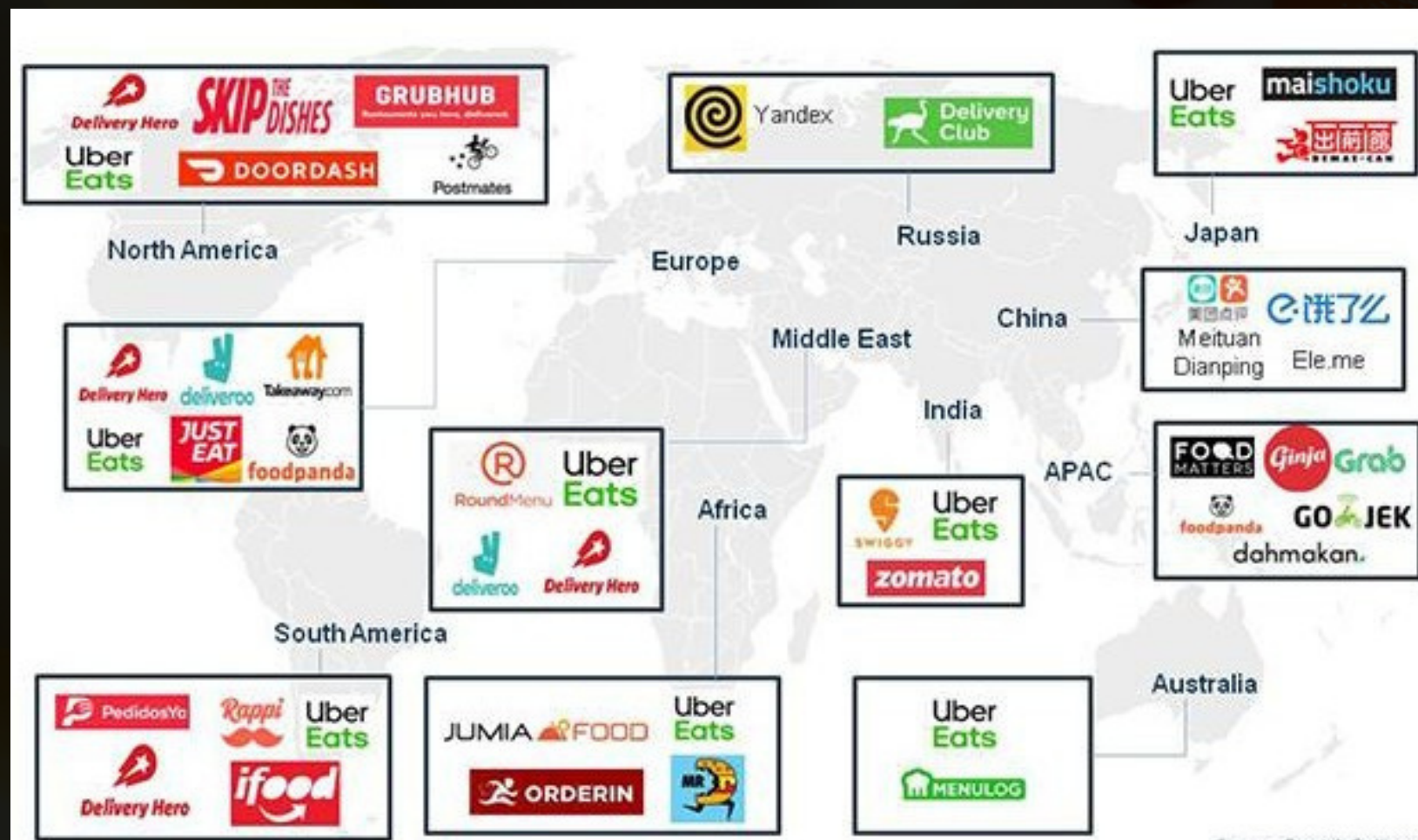
**20%** increase in check sizes from online and delivery orders versus dine-in orders



Third-party apps can provide free advertising because they allow a wider visibility on the internet

# OTHER MARKET PLAYERS

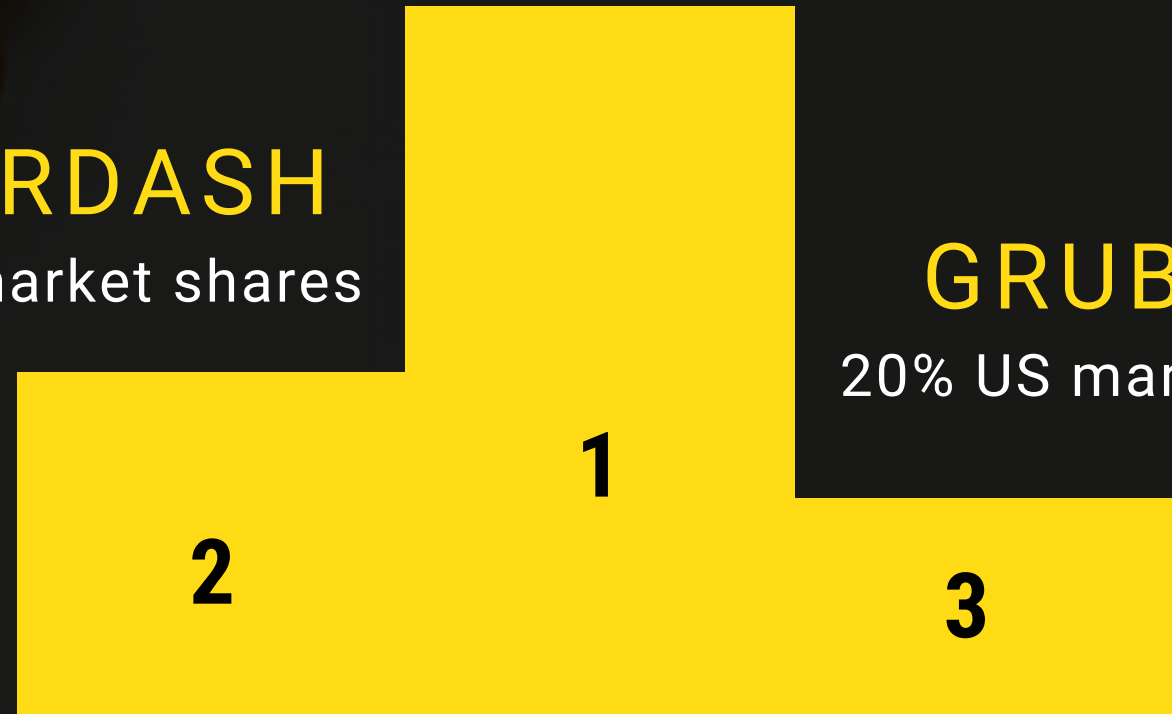
## THE MAIN DELIVERY COMPANIES



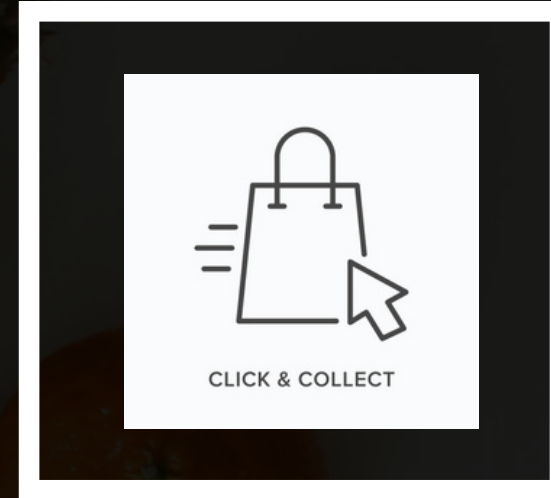
**UBEREATS**  
Leader

**DOORDASH**  
45% US market shares

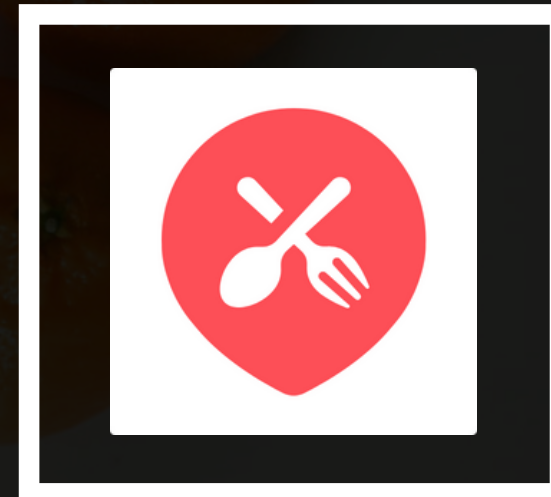
**GRUBHUB**  
20% US market shares



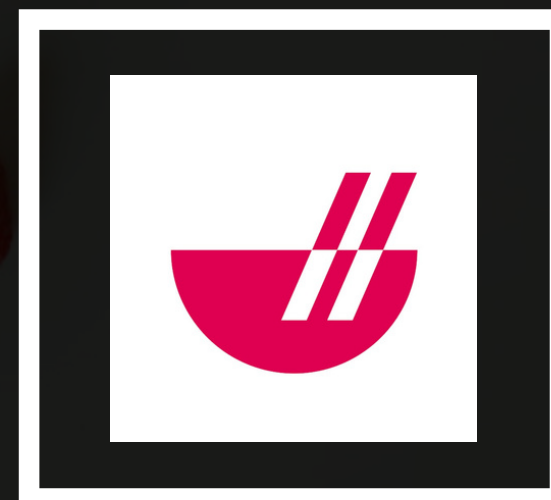
# ALTERNATIVE BUSINESSES



Click & Collect



ChowNow



Black Mobil  
ChowBus



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**THANK YOU**

for your attention.

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March 8th, 2022