NEW CONSUMER HABITS

with the rise of delivery services in the catering industry.

March 8th, 2022
WHAT IS A FOOD DELIVERY SERVICE?

A service that sends customers fresh or frozen, prepared meals delivered to their homes and offices.
EVOLUTION OF USES & CAUSES

CONSUMER LEVEL

2021: $150 billion
A 20% rise
2030: $365 billion

Closures and physical distancing requirements
Generation Y consumers

Market evolution in volume

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
The average person has two food delivery apps and uses them **3x per month**

**54%** start with a restaurant in mind, then look for it in the apps

**46%** start by opening an app, then look for ideas

**MOST POPULAR APPS**

1. Uber Eats
2. Grubhub
3. DoorDash
4. Postmates

**THE WAIT**

On average, **40 minutes** is the longest we’ll accept for estimated delivery

- 20 mins: 7%
- 30 mins: 31%
- 40 mins: 27%
- 50 mins: 12%
- 60 mins: 20%
- 70+ mins: 3%

**THE COST**

What’s the most you’ll pay for delivery fee, service fee and tip combined?

- Average: **$8.50**
  - $5 or less: 35%
  - $6-10: 37%
  - $11-15: 28%

**THE DISTANCE**

What’s the shortest distance you’ll still opt for delivery over takeout?

- Average: 1.5 miles
  - Less than ½ mile: 31%
  - ½ to 1 mile: 33%
  - 1-2 miles: 15%
  - 2-3 miles: 8%
  - More than 3 miles: 15%

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Survey of 1,518 American who have used food delivery apps, 2019
WHAT ARE THEY ORDERING?

Pizza in 40 countries

Chinese food in 29 countries

Sushi in 10 countries
CONSUMER PROFILES-CONTINUATION

Their expectations

- Variety
- Customisation
- Rapidity
CONSUMER PROFILES - CONTINUATION

- Satisfying a craving: 47%
- Treating themselves: 33%
- Trying new things: 30%

Their needs
Of customers conduct online research before choosing a restaurant.

The decision-making process

90%

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 ...

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

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

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
THANK YOU
for your attention.