

HOTREC Restaurant Booking Study (preliminary results)



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AGENDA

- Aims of the Study
- Methodological approaches
- Overview on the European restaurant market
- Global evolution of restaurant booking and delivery portals (*desk research*)
- Website Analysis Germany and France
- Results of the European restaurant and expert survey
- Conclusions

Main Goals of the Study

- Map and assess the current market situation concerning restaurant bookings and deliveries in Europe:
- **Relevant players** on the restaurant booking platform market
 - **Evolution** of the online **restaurant reservation portals**
 - Identification of **market shares of different direct and indirect distribution channels** for advanced restaurant bookings
 - **Market share** of the individual restaurant booking **platforms** in the restaurant booking market
 - Common terms and **conditions** of key reservation platforms and evolution over past 5 years
 - Evolution of **market of food deliveries** from restaurants
 - **Perception of an industry-led reservation platform** for restaurants

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Methodological approaches

Desk research

Reports and studies on booking portals and delivery services sector.

Website

Profiling of major players based on data from website and annual reports.

Case studies Germany and France

Analysis of a representative sample of restaurants (n=600) in each country. On restaurant websites and websites of main booking portals -> assessment of importance of third-party services in restaurant sector of **two of the three biggest countries** in terms of restaurant sector (Italy covered by indep. study).

Online survey among restaurants

Online survey covering most aims of the study distributed via national restaurant associations since beginning of September 2018.

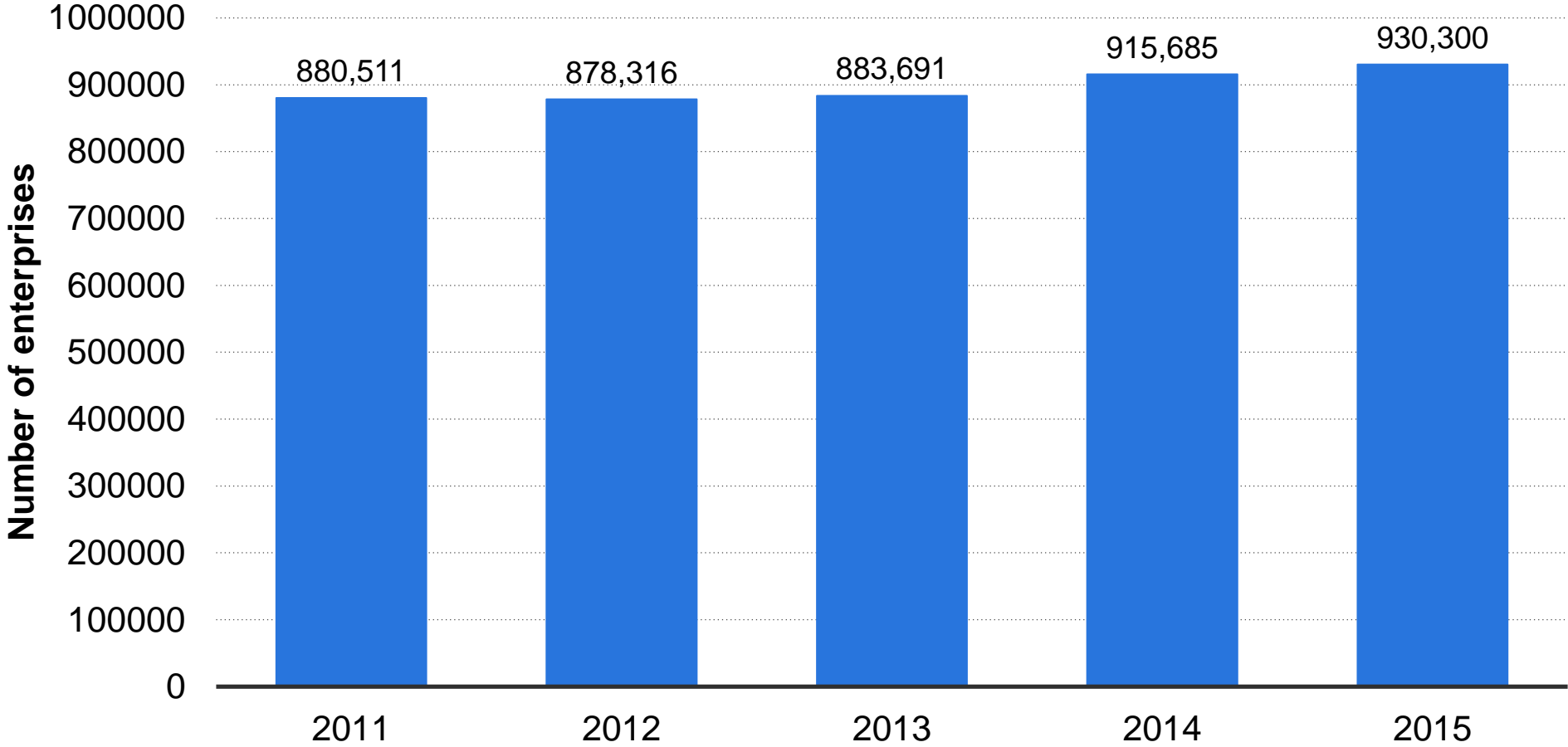
On October 12, we had **629** valid responses.

Before summer, a similar survey was sent to sector experts (n=14).

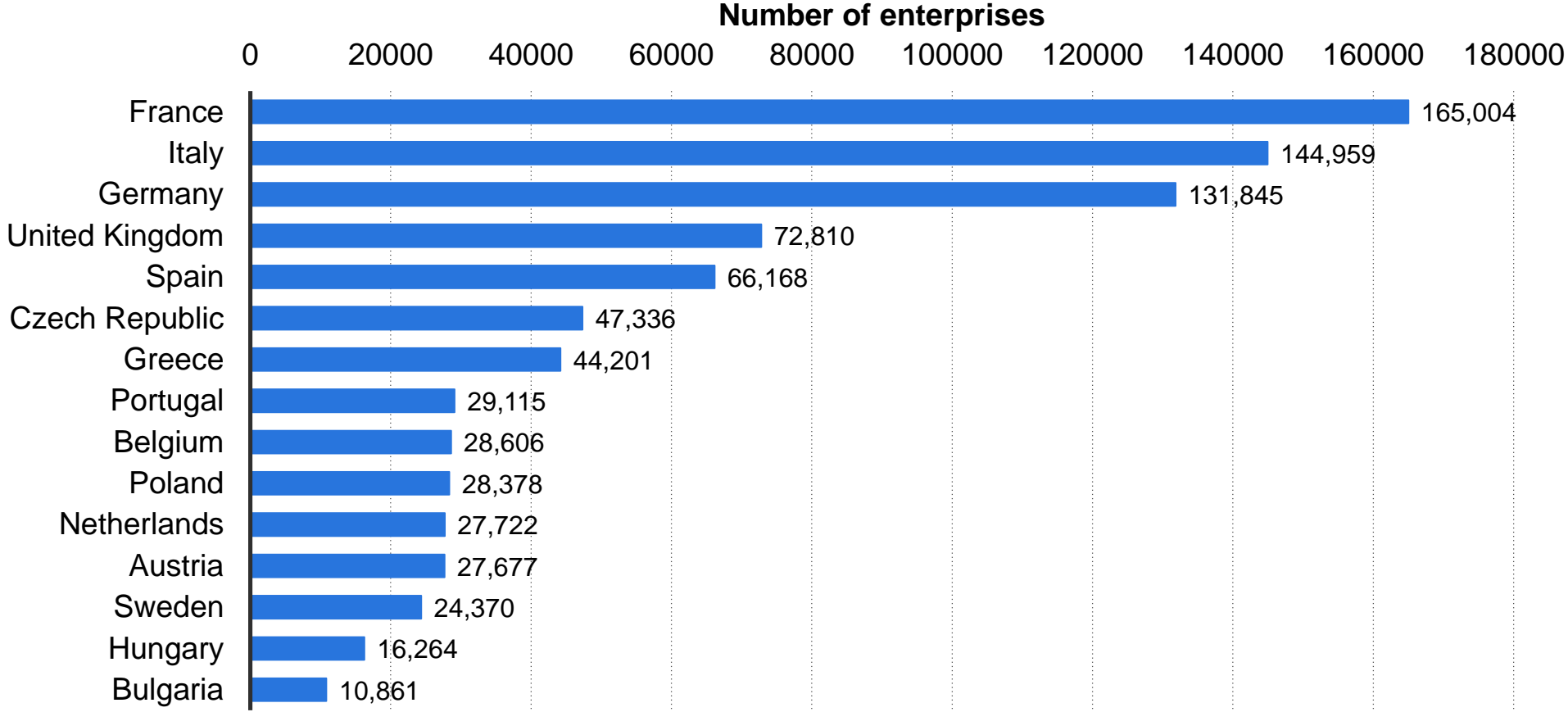
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Number of enterprises in the restaurants and mobile food service activities industry in the European Union (EU-28) from 2011 to 2015



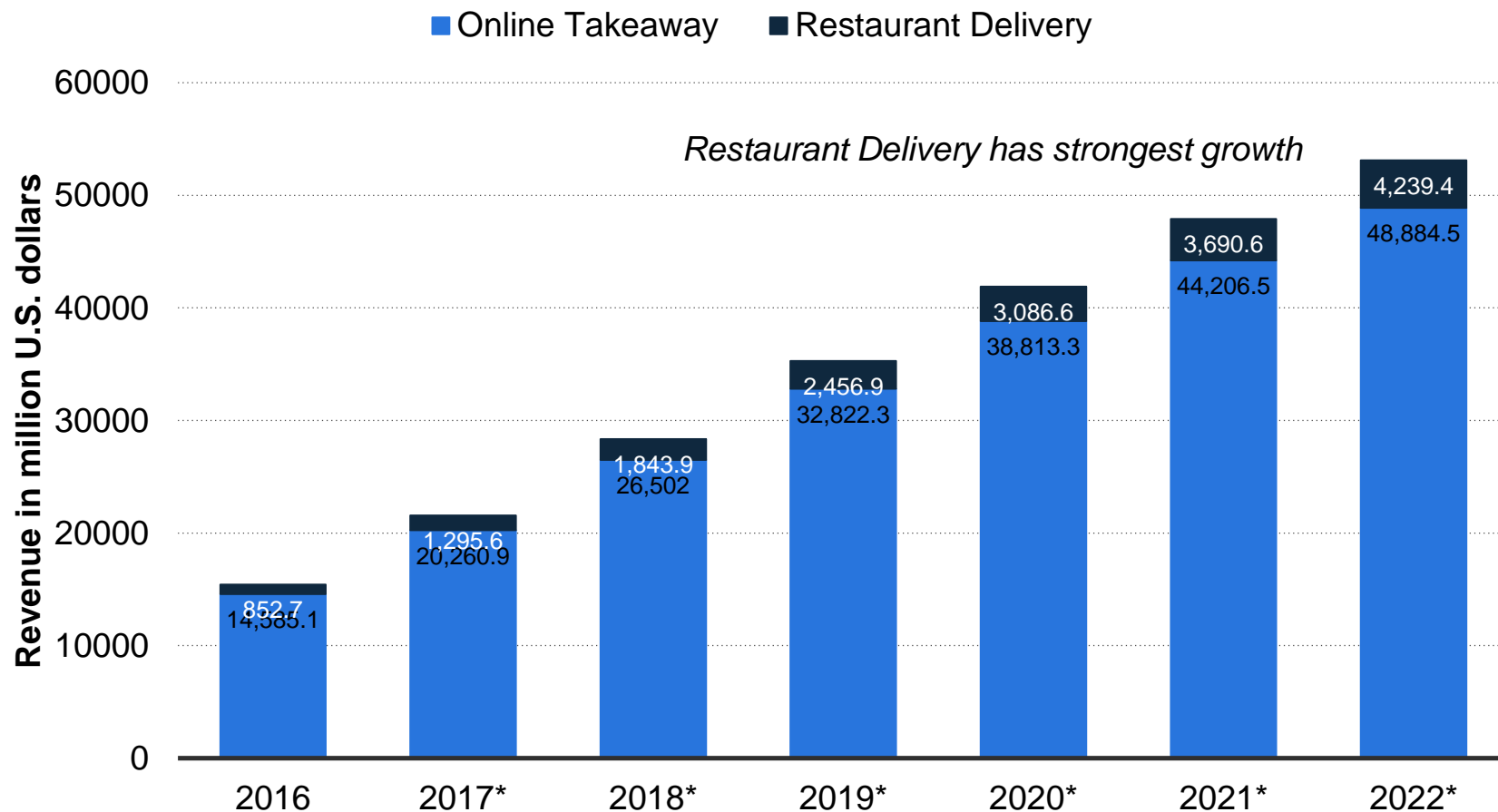
Number of enterprises in the restaurants and mobile food service activities industry in the European Union (EU-28) in 2015, by country



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Online food delivery revenue in Europe from 2016 to 2022



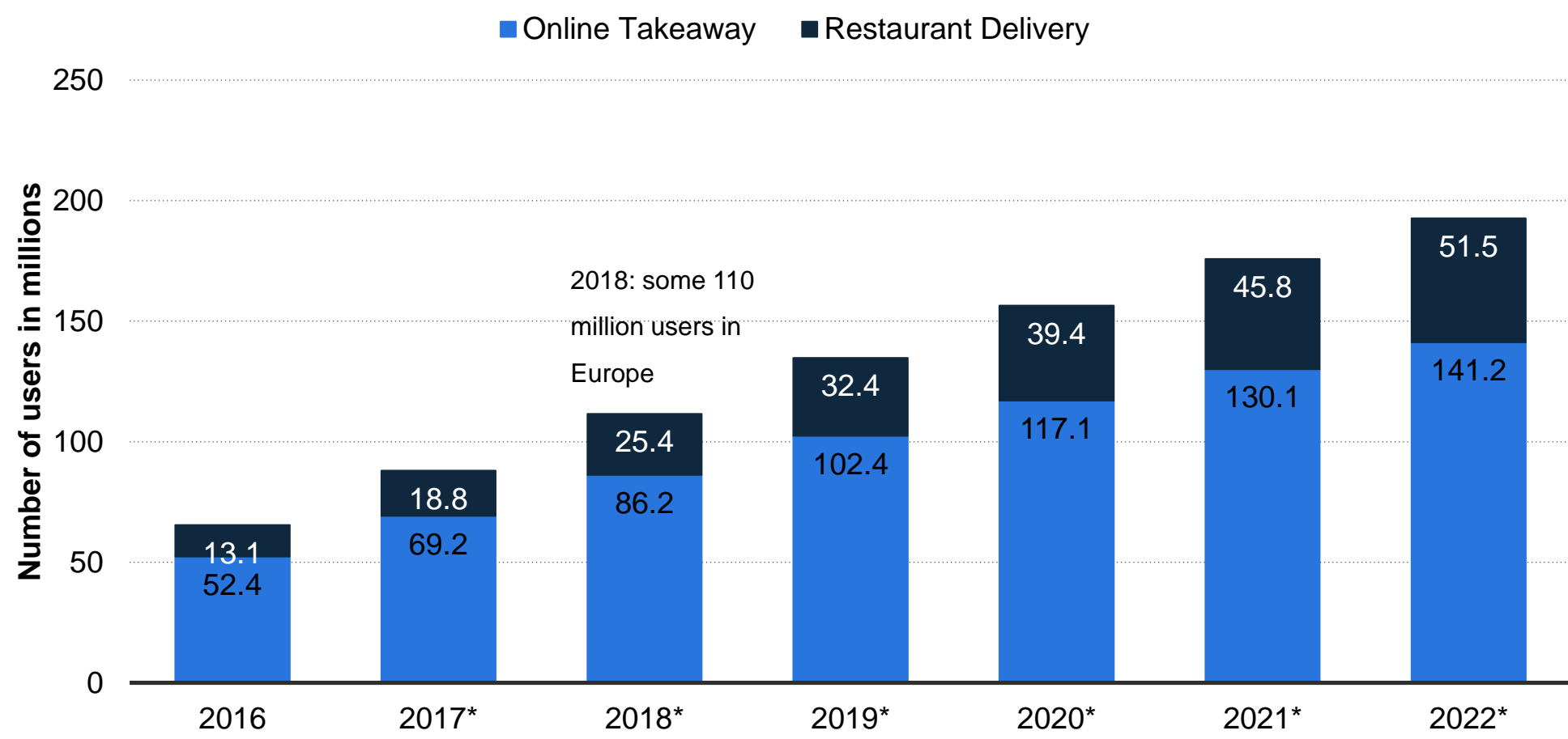
"**Restaurant Delivery**" focuses on online delivery services that serve meals to customers prepared by partner restaurants which do **not** necessarily offer a delivery of their food. **Delivery provided by third-party** like Deliveroo.

The "**Online Takeaway**" segment covers the delivery of meals using aggregation portals such as Delivery Hero or Just Eat but restaurants run their own delivery service.

2018: Food delivery 28 billion \$ compared to 410 billion \$ turnover of the food and beverage service in Europe -> 7%

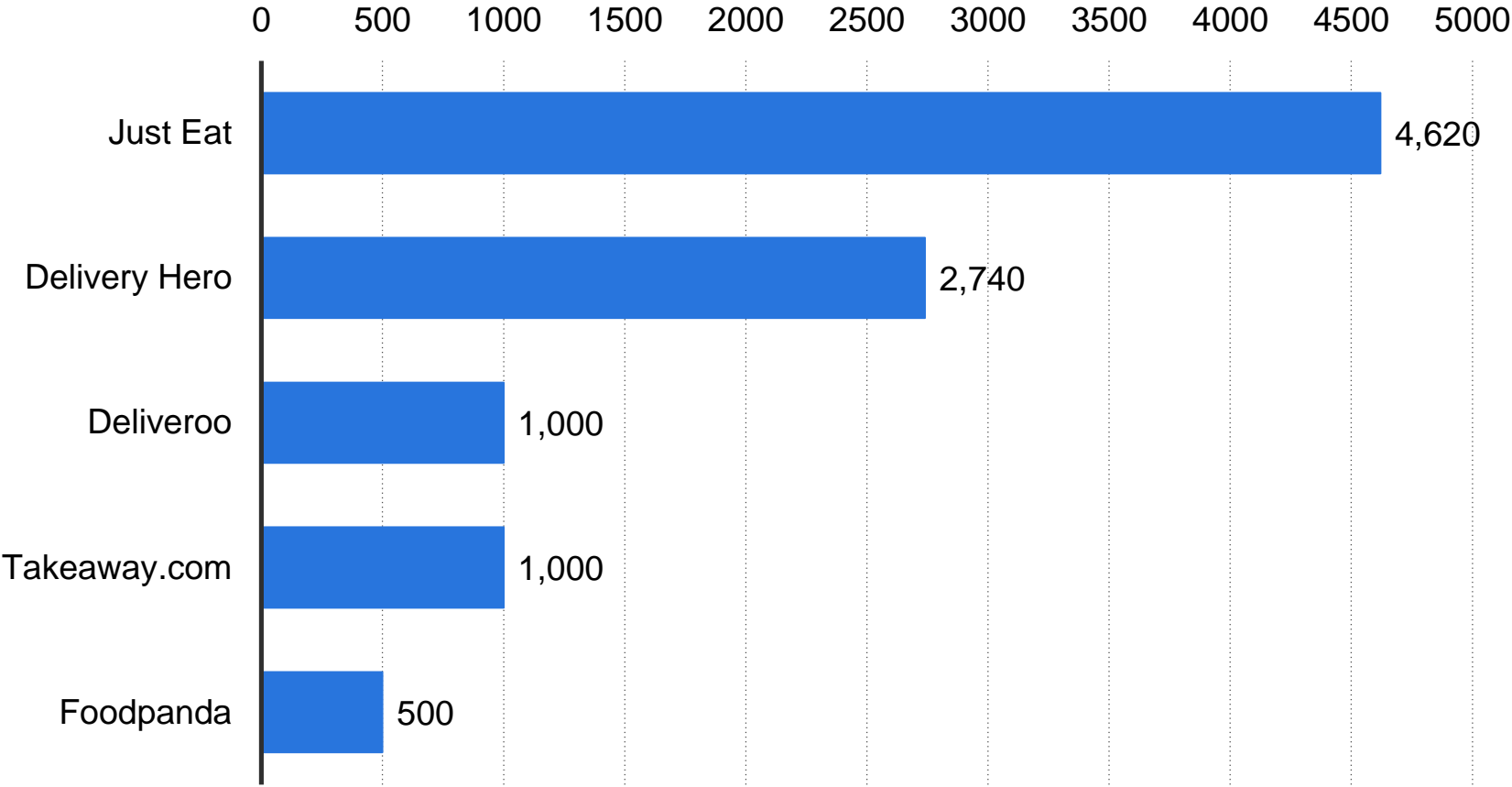


Number of online food delivery users in Europe from 2016 to 2022, by category (in millions)



Market valuation of new food delivery companies in Europe as of August 2016

Market valuation in million euros



Annual revenue Just Eat worldwide in 2017: 623 million Euro. 82'300 restaurants on platform

Annual revenue Delivery Hero worldwide in 2017: 544 million Euro

Annual revenue Food Panda worldwide in 2016: 50.6 million Euro



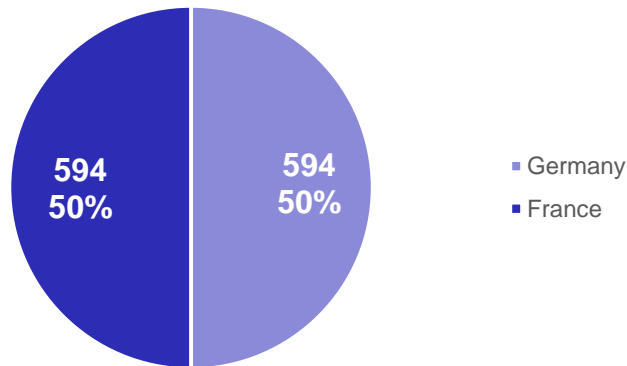
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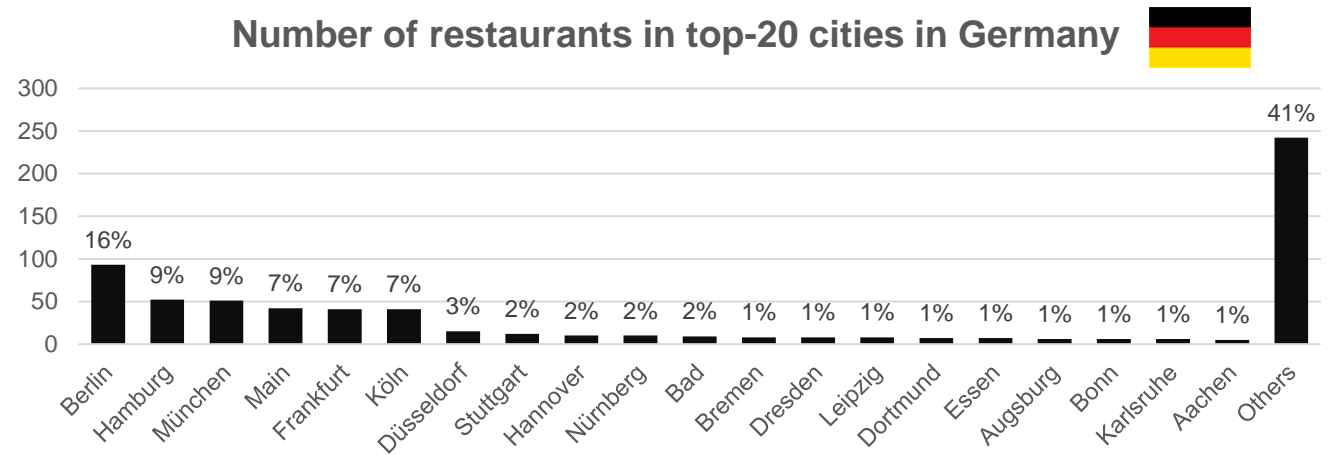
Analysis of Booking **Options** on Restaurant Websites in Germany and France

Sample Size Details

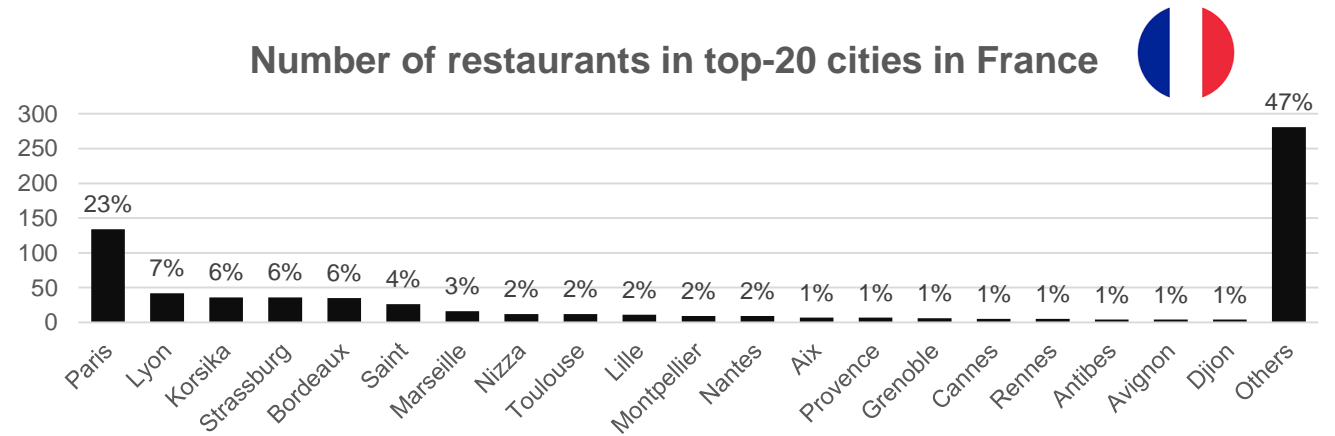
Number of selected restaurants in Germany and France



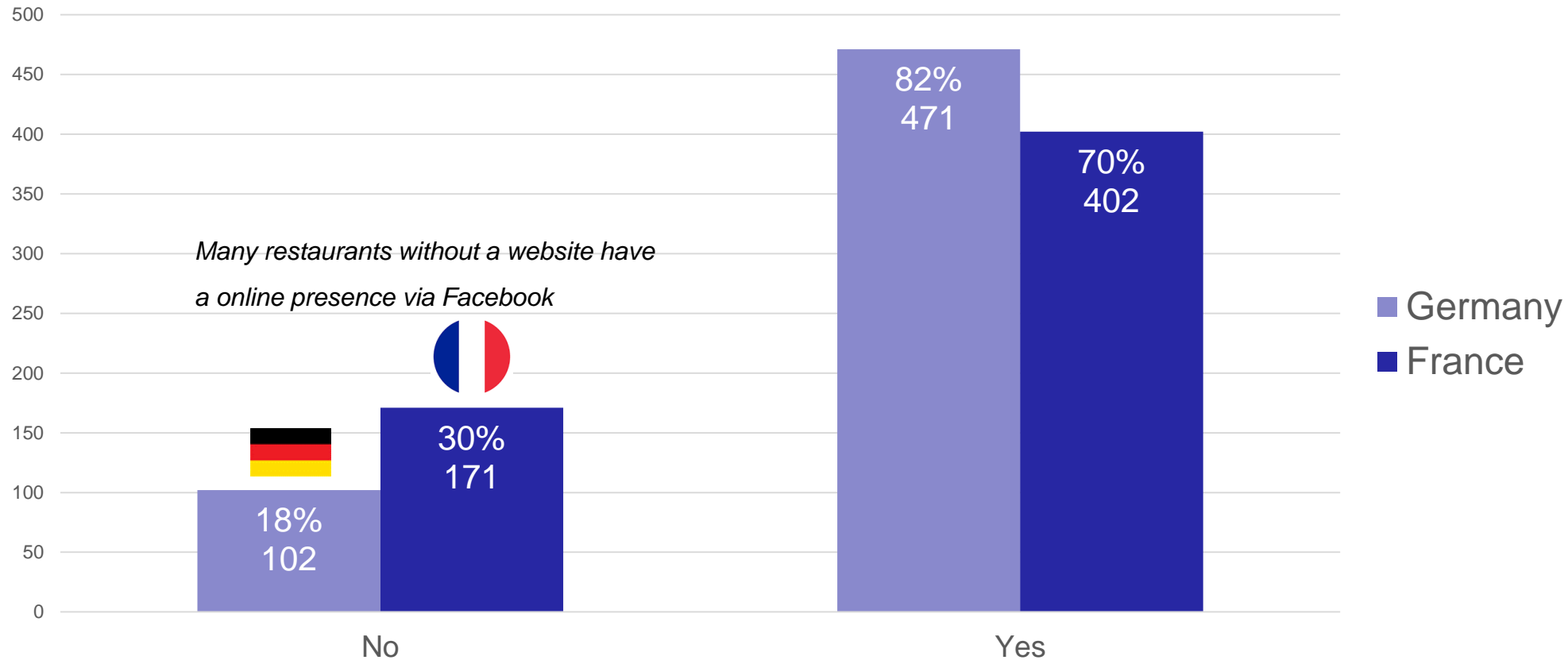
Number of restaurants in top-20 cities in Germany



Number of restaurants in top-20 cities in France



Having a Websites



Third-party Booking System on Restaurant Website

Bookatable (by Michelin)

The screenshot shows the website for Restaurant Haerlin. At the top, there's a navigation bar with various app icons. Below it, a large image of the restaurant interior is visible. The main content area features the restaurant's logo and name, "RESTAURANT HAERLIN" by "Christoph Rüffer". A booking widget is prominently displayed, titled "Haerlin" and "Wählen Sie Datum, Personenanzahl und Tagesabschnitt:". It includes a dropdown menu for "2 Personen" and "Abend", a calendar for "August 2018" with the 22nd and 23rd highlighted, and a "Reservieren" button. To the right of the calendar, there is a text block in German providing information about reservations, including contact details and a phone number: "Tel.: +49 (0) 40 34 94 33 10".

The screenshot shows the mobile app interface for Bookatable. The browser address bar displays "https://bda.bookatable.com/Mobile/AvailableTimes?sessionGuid=90cc5841-3578-42c3-aaad-2618bbb428c1". The app title is "Zeit wählen" (Time selection). Below the title, it shows the restaurant name "Haerlin" and the availability "Abend verfügbar für 2 Personen am 13 September 2018". A section titled "Reservierungszeit:" (Reservation time) contains a row of buttons for different time slots: "18:30", "19:00", "19:30", "20:00", "20:30", and "21:00". At the bottom, there is a logo for "Bookatable by Michelin" and a small text box that reads "LES GRANDES TABLES DU...".

Booking Form

RÉSERVATION & INFORMATION : 01.47.27.24.14

newjavad

PRÉSENTATION LA CARTE LES AVIS RÉSERVATION LIVRAISON EN – 30 MINS PLANS D'ACCÈS

ENTRÉES

PLATS PRINCIPAUX

DESSERTS

BOISSONS

MENUS

Réserve en ligne

Nom / Prénom

22/08/2018

11h00

Tél

Email

Je réserve !

Informations pratiques

Adresse:

12, avenue Rapp
75007 Paris
E-Mail : contact@newjavad.fr
Tél : +33 (0) 147 059 137

New-Jawad complètement refait en 2014, à la décoration désormais chic et contemporaine.

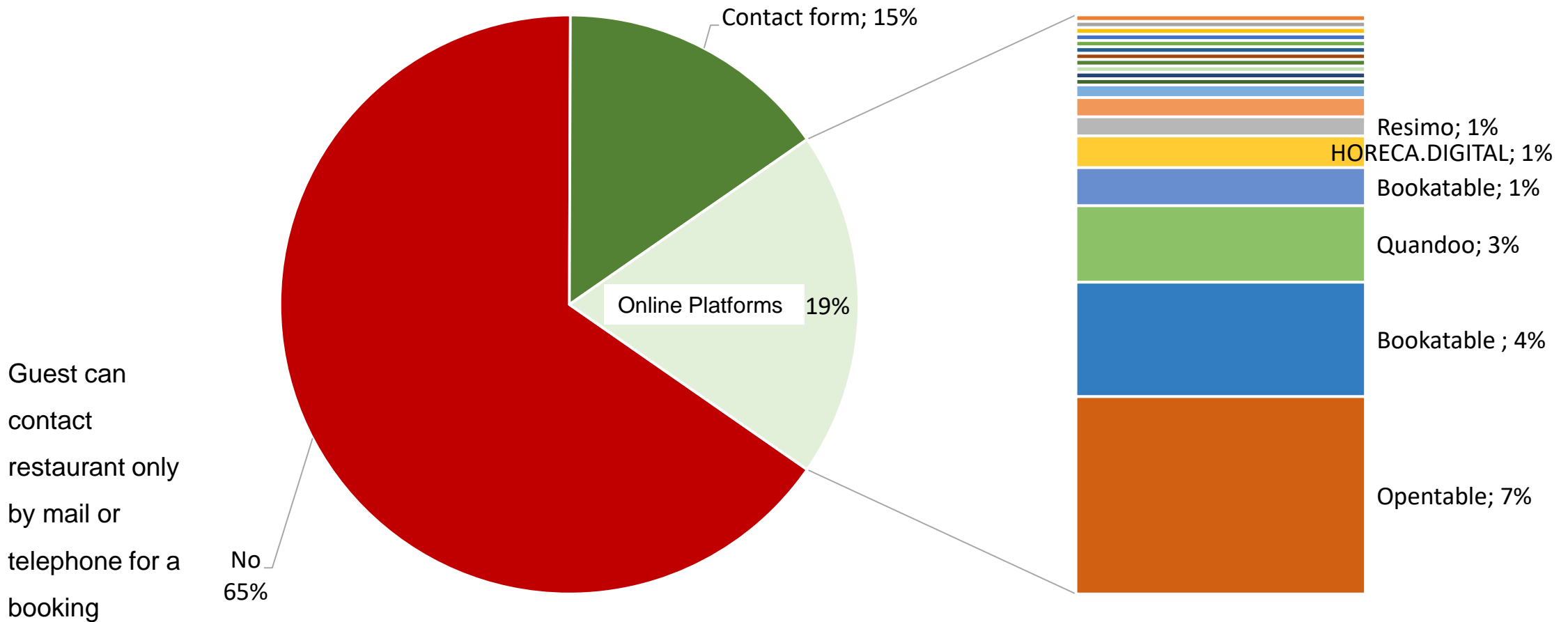
La carte fait vraiment le tour des grands classiques de la cuisine indienne et pakistanaise avec efficacité, ainsi qu'un sens certain de l'utilisation des épices. Ce n'est d'ailleurs pas par hasard que beaucoup d'Indiens en vacances à Paris viennent manger ici, vous en verrez probablement autour de vous pendant votre repas. Les végétariens ne seront pas en reste car ils disposent aussi d'un large choix de plats à la carte.

Menus à partir de 15 €, hors boissons

Horaires:

De 11h30 à 14h30 et 19h00 à 23h30

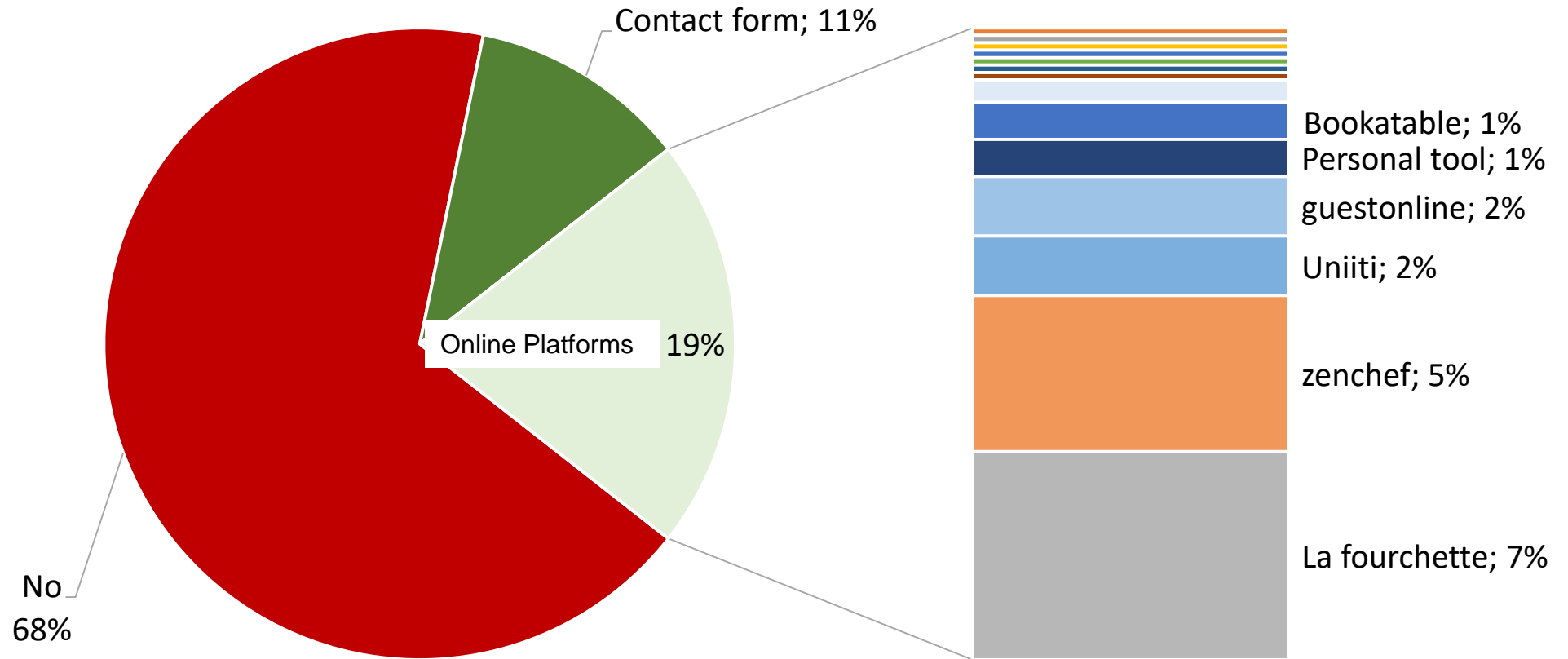
Booking Options Germany



19% of restaurant use a third-party booking platform on their website, only 15% have an own formalized table booking form on their website.



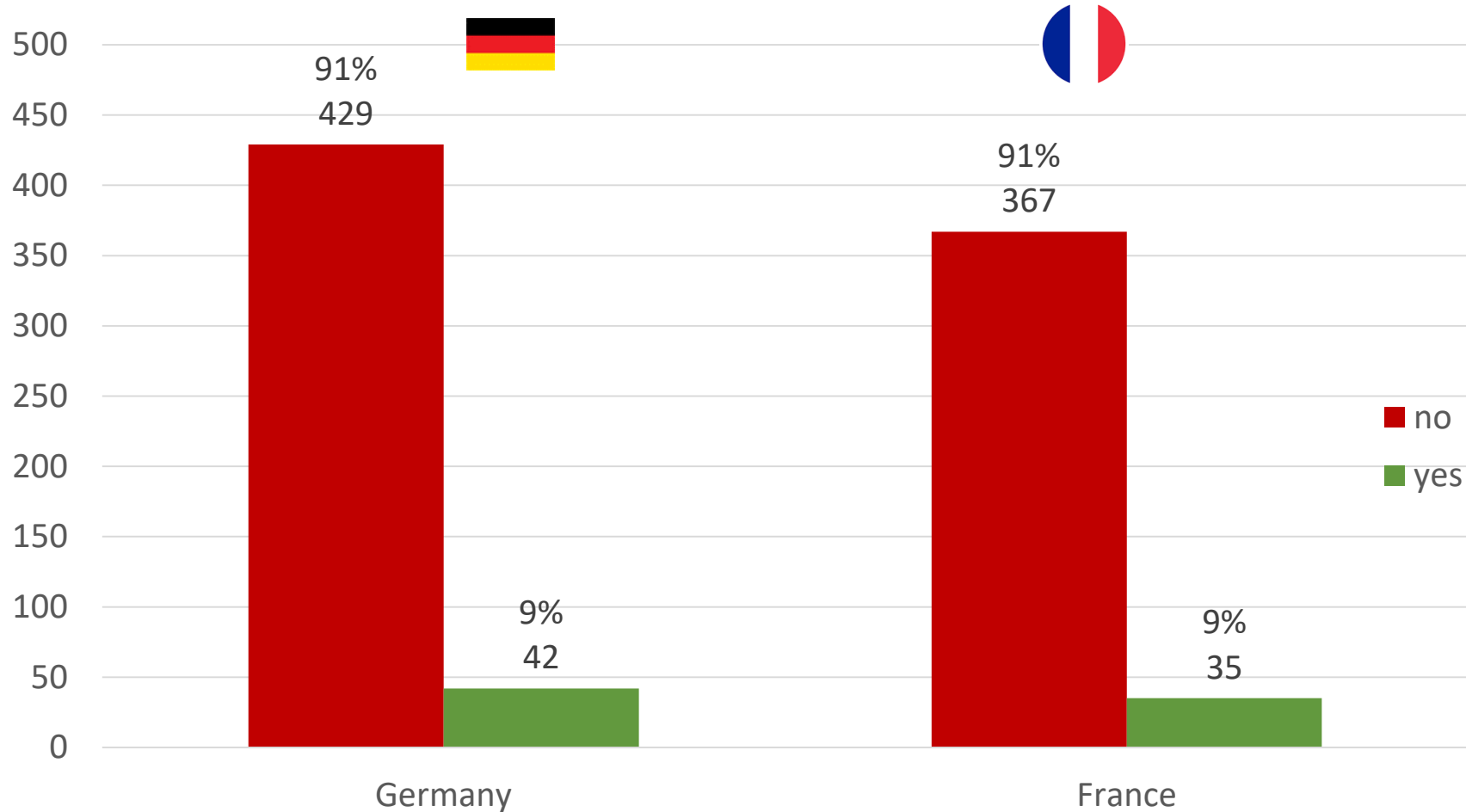
Booking Options France



19% of restaurant use an external booking platform, only 11% have an own formalized table booking online form on their website.



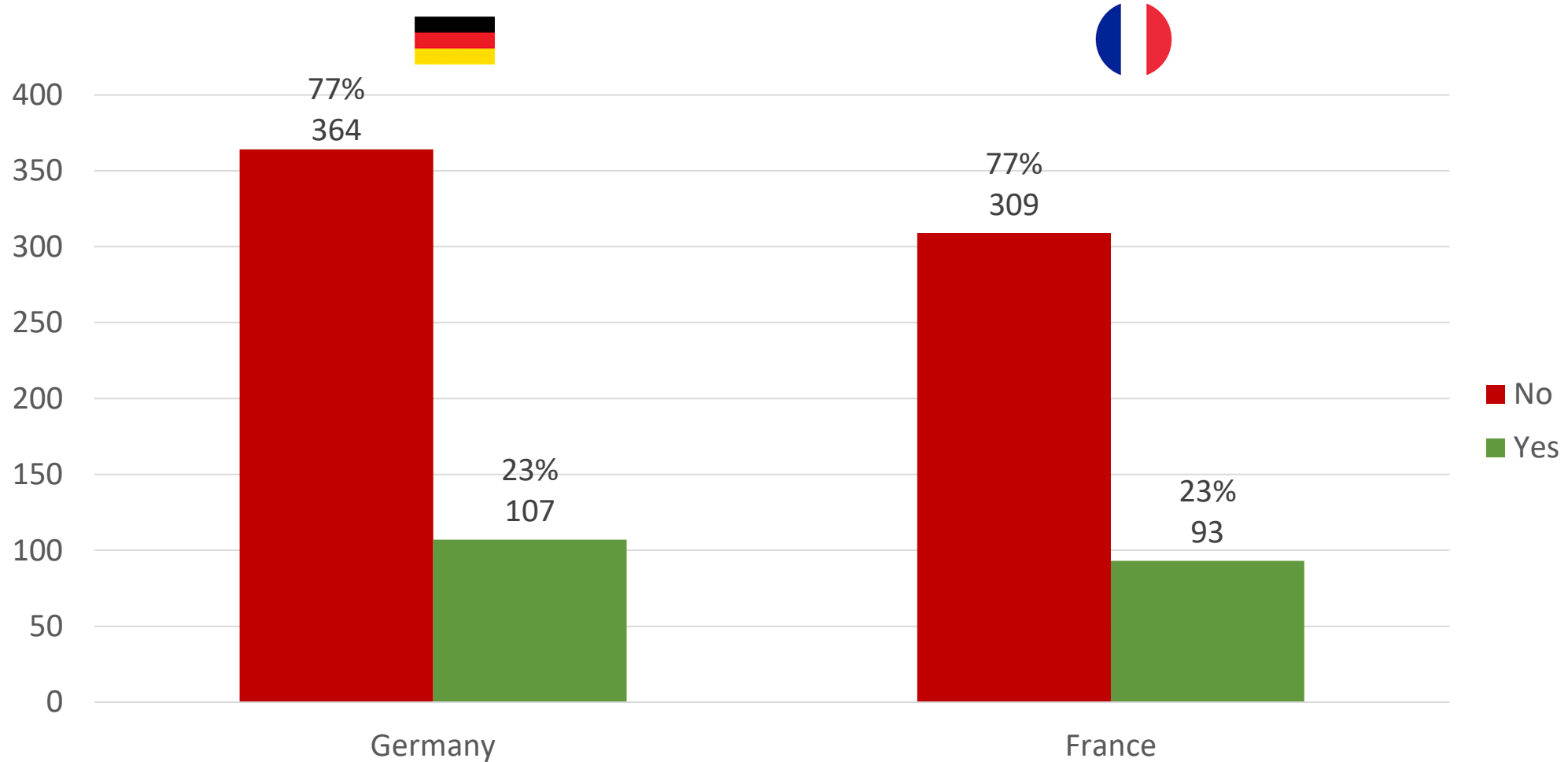
Delivery Services: Germany versus France



One out of ten restaurants offers a delivery service on website

Comment: The delivery services is stated **on the website** of the restaurant.

Take-Away: Germany vs France



Comment: Indicated on the website that food is available for take-away. Only restaurants with a website are included.



Analysis of the Presence of German and French Restaurants on Main Booking and Delivery Platforms

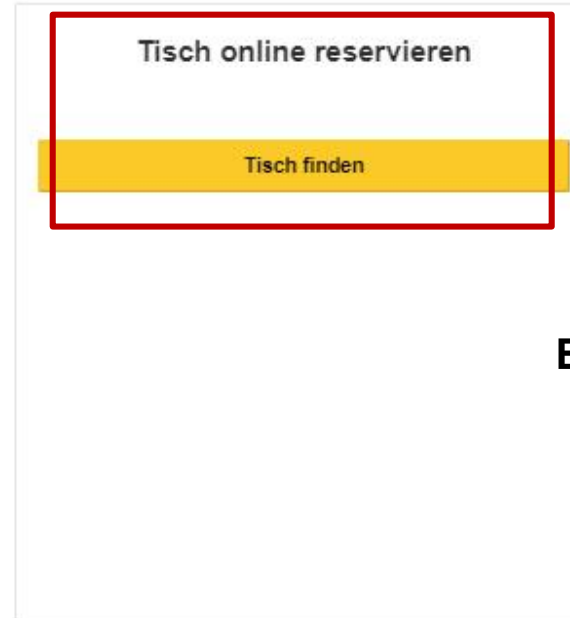


Online Booking on Tripadvisor

FACIL

750 Bewertungen | Nr. 19 von 7271 Restaurants in Berlin | €€€€ | international, europäisch, glutenfreie Speisen
Potsdamer Straße 3 | Im The Mandala Hotel, 10785 Berlin, Deutschland | +49 30 590051234 | Webseite

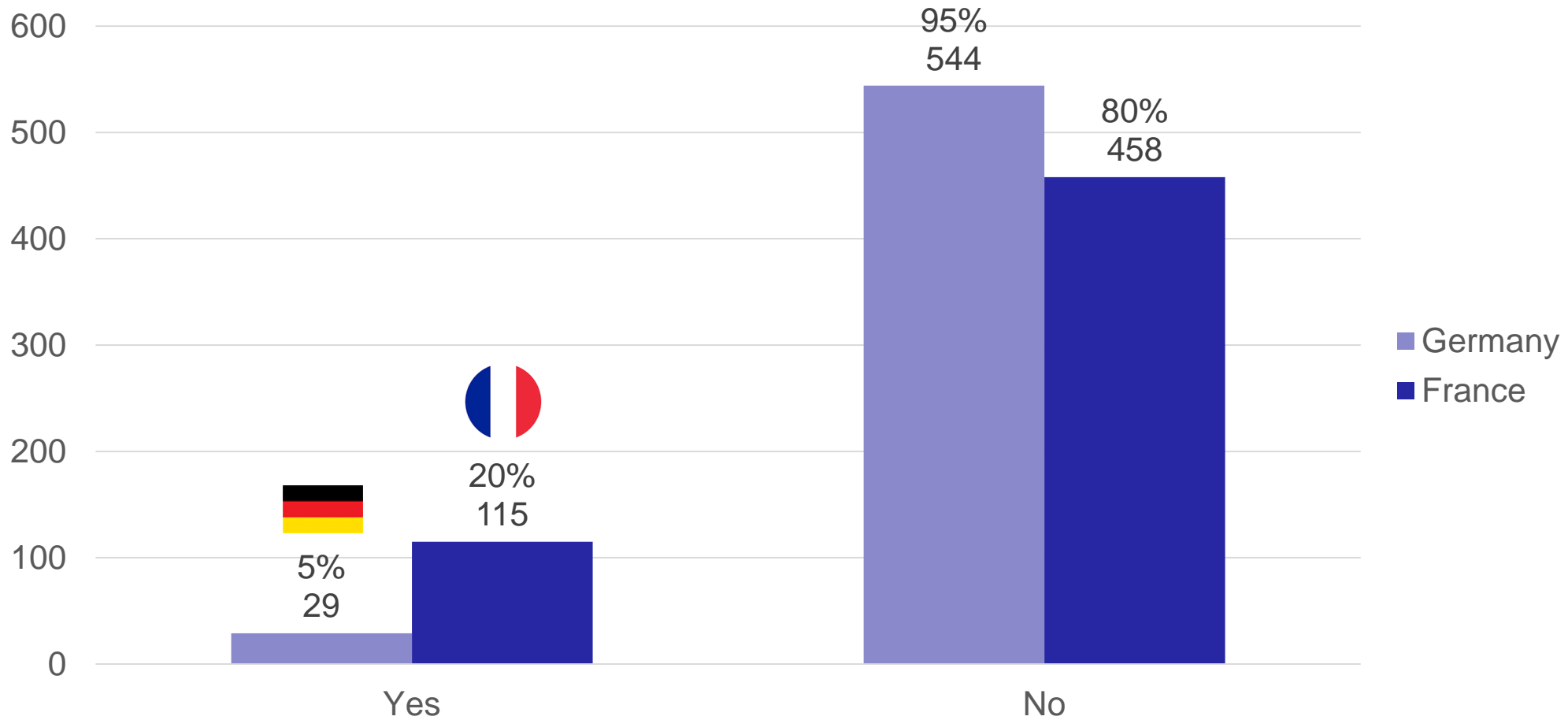
Speichern | Teilen



BookATable (Michelin)

Überblick | Bewertungen | Standort | F & A | Details

Online Booking on TripAdvisor



Delivery on Tripadvisor

Edmond Pure Burger Palais Gallien

67 Bewertungen | Nr. 646 von 2'171 Restaurants in Bordeaux | €€ - €€€
34 rue du Palais Gallien, 33000, Bordeaux, Frankreich | +33 5 56 81 77 93 | Webseite

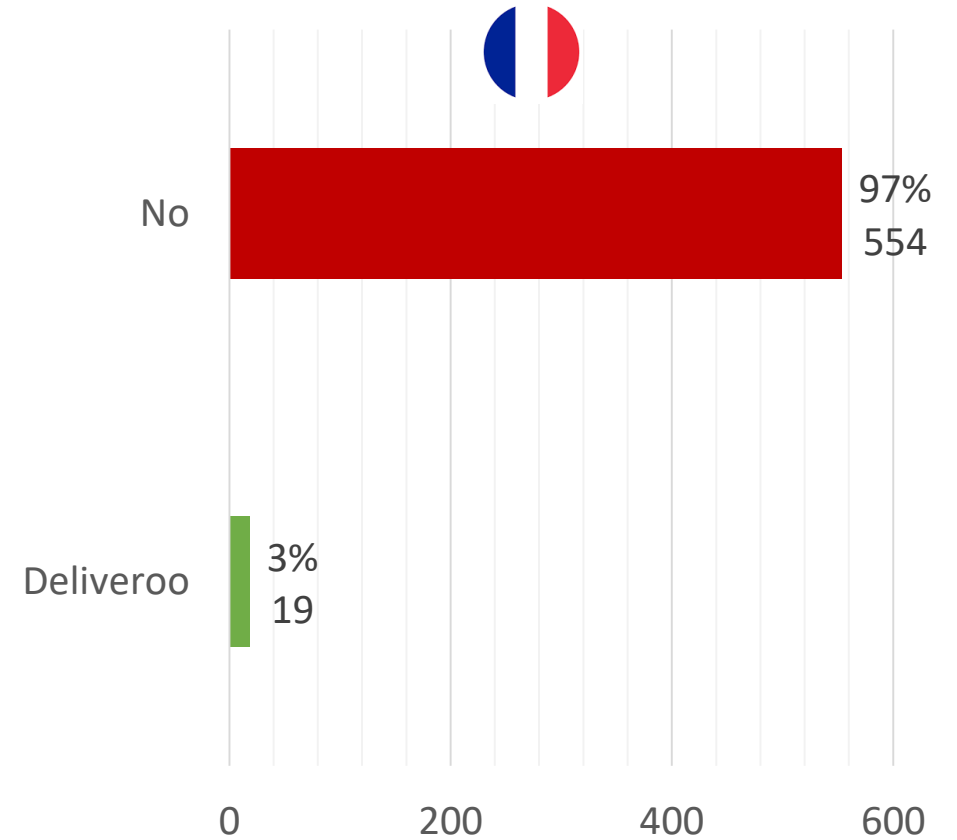
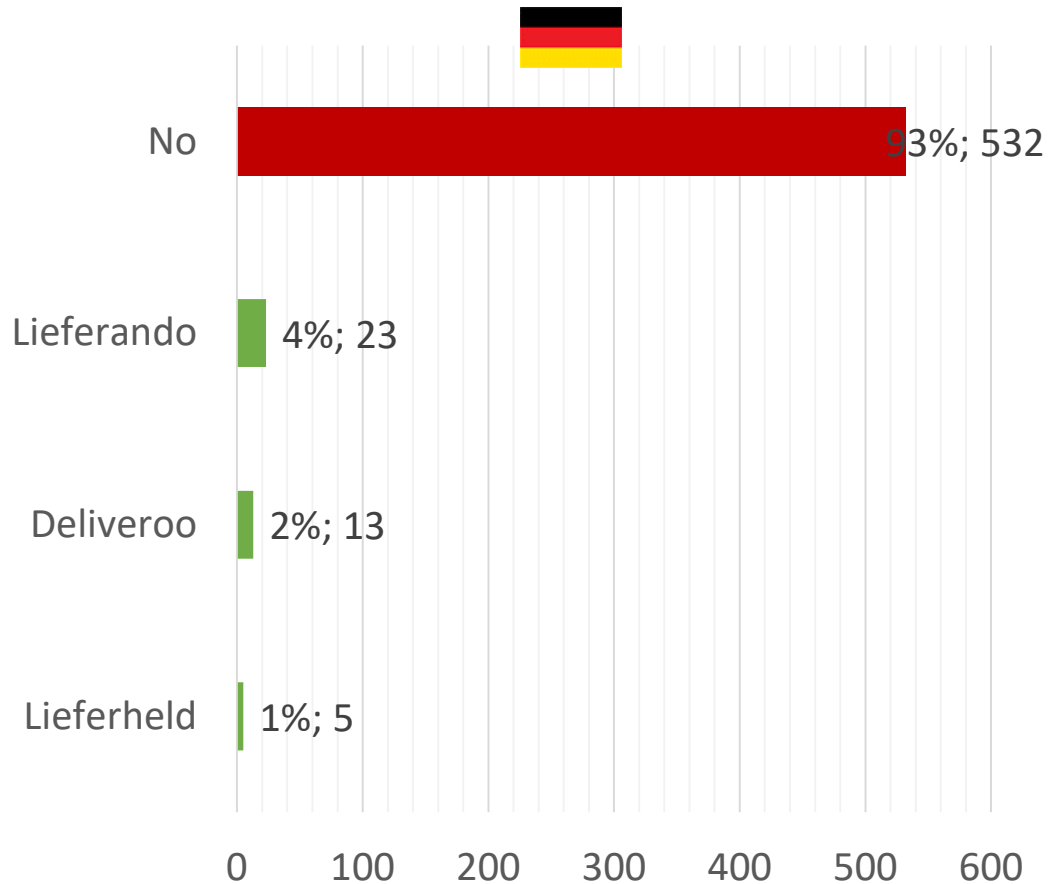
Speichern | Teilen



Liefern lassen von Deliveroo

Online bestellen

Delivery service on TripAdvisor



Delivery service can be ordered in **7%** of restaurants in Germany and **3%** of restaurants in France on TripAdvisor

Presence of restaurants on booking platforms

https://restaurant.michelin.fr/3735331/ramen-bowl-paris-08

Accueil > France > Île-de-France > Ville-de-Paris > Paris > Paris 08 > Ramen Bowl

Ramen Bowl

Aucun avis pour l'instant

44 rue de Ponthieu Paris 8, 75008 PARIS

Plan

Asiatique, Japonais | Prix moyen - 16 €

PHOTOS (10) | Menus | Informations

Photos (10)

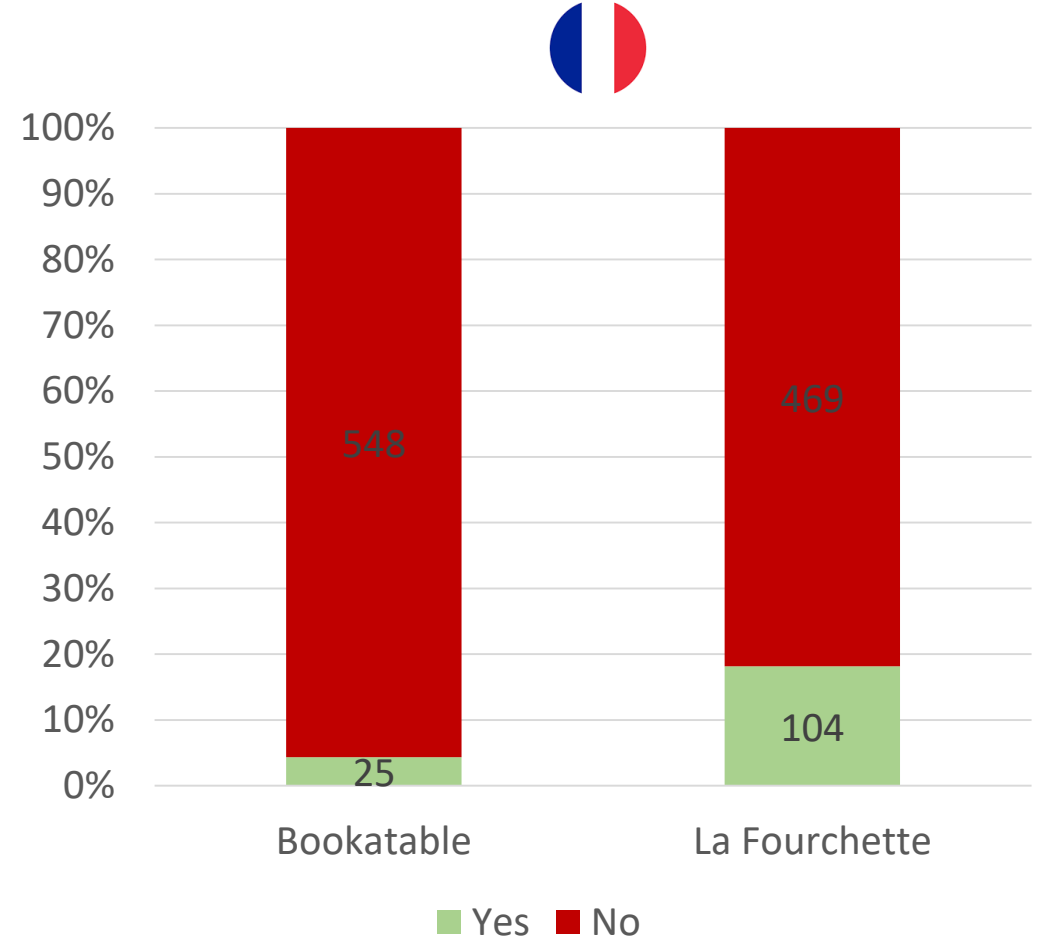
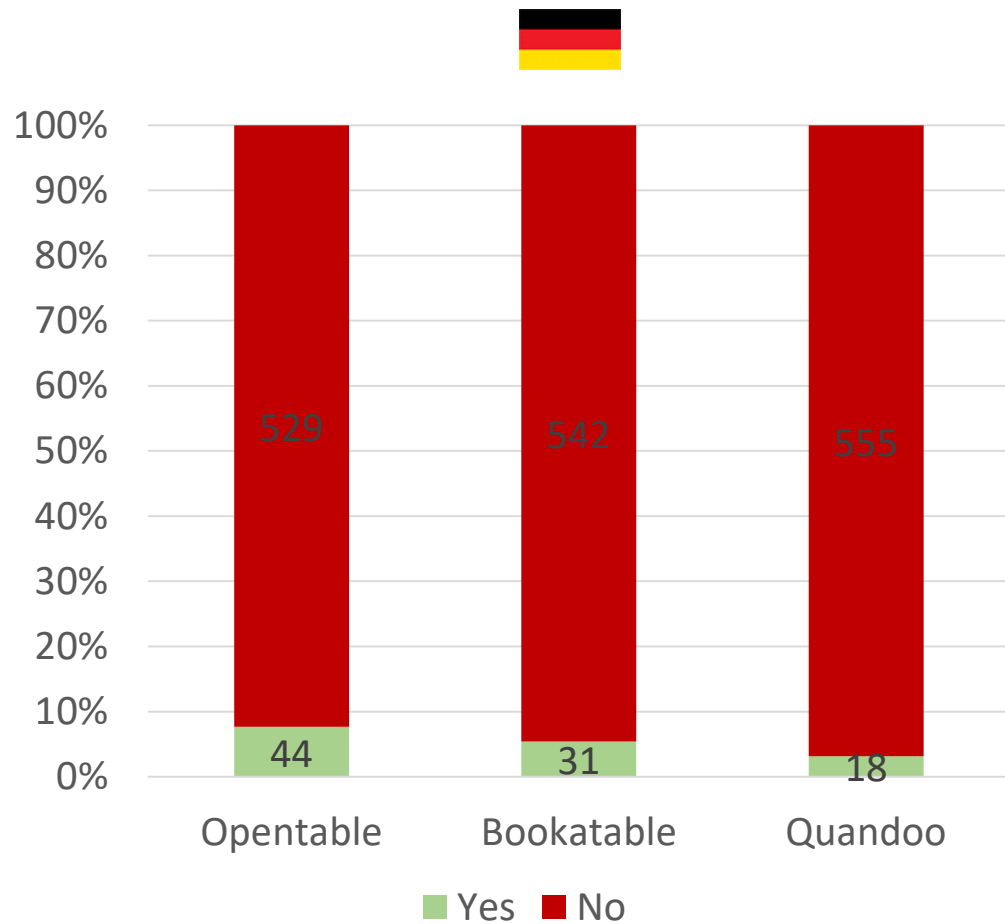
En continuant à naviguer sur notre site, vous acceptez que nous utilisions des cookies pour mesurer l'audience de notre site et vous proposer des contenus selon vos centres d'intérêts. [En savoir plus et gérer les paramètres.](#)

J'accepte

Comment:

- Restaurant on the official page of a booking platform
- The restaurant needs to be «bookable» on the site

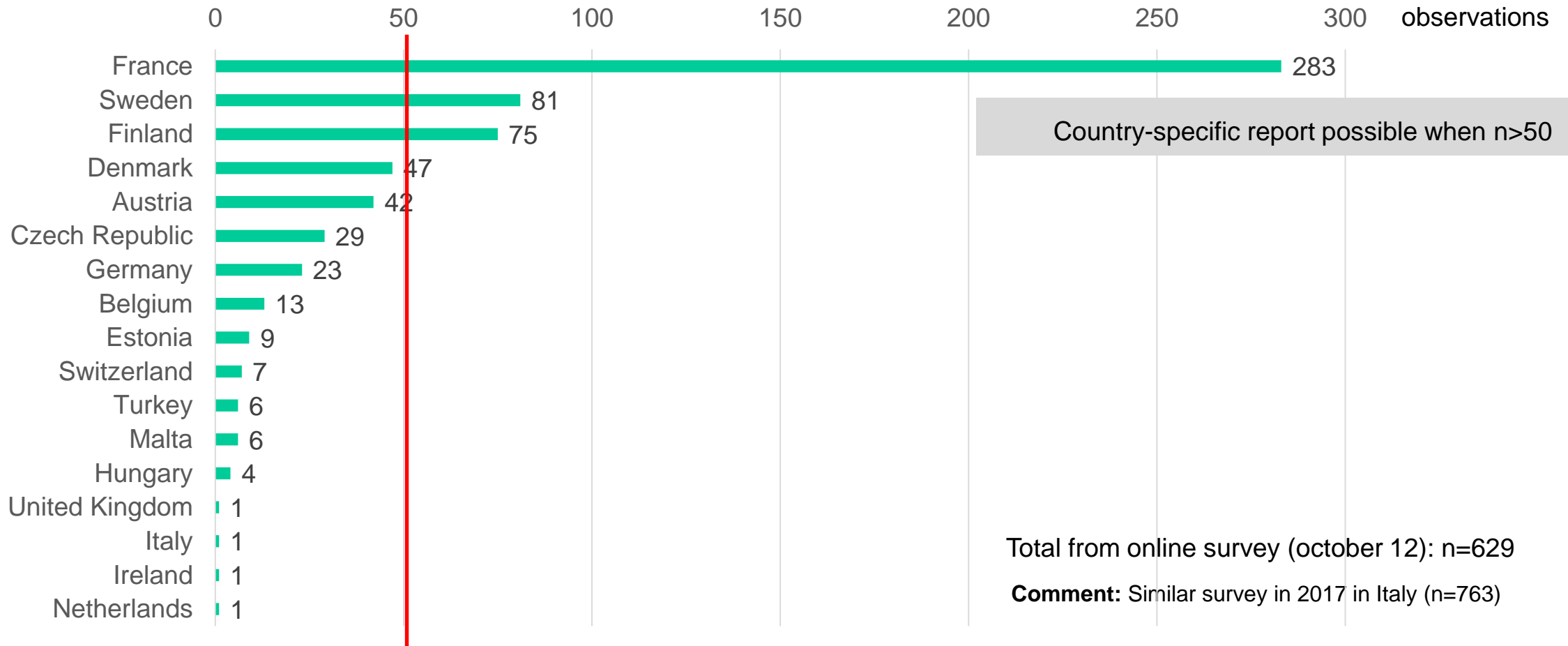
Presence of Restaurants on Booking Platforms



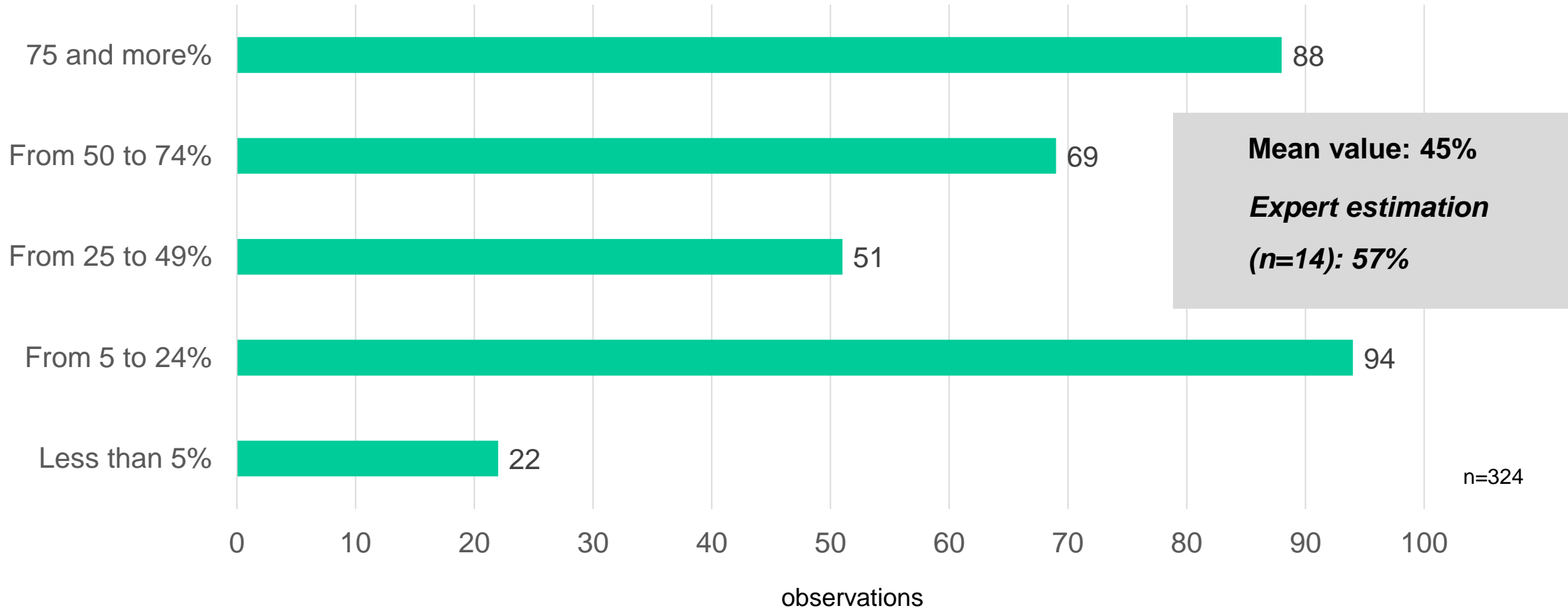
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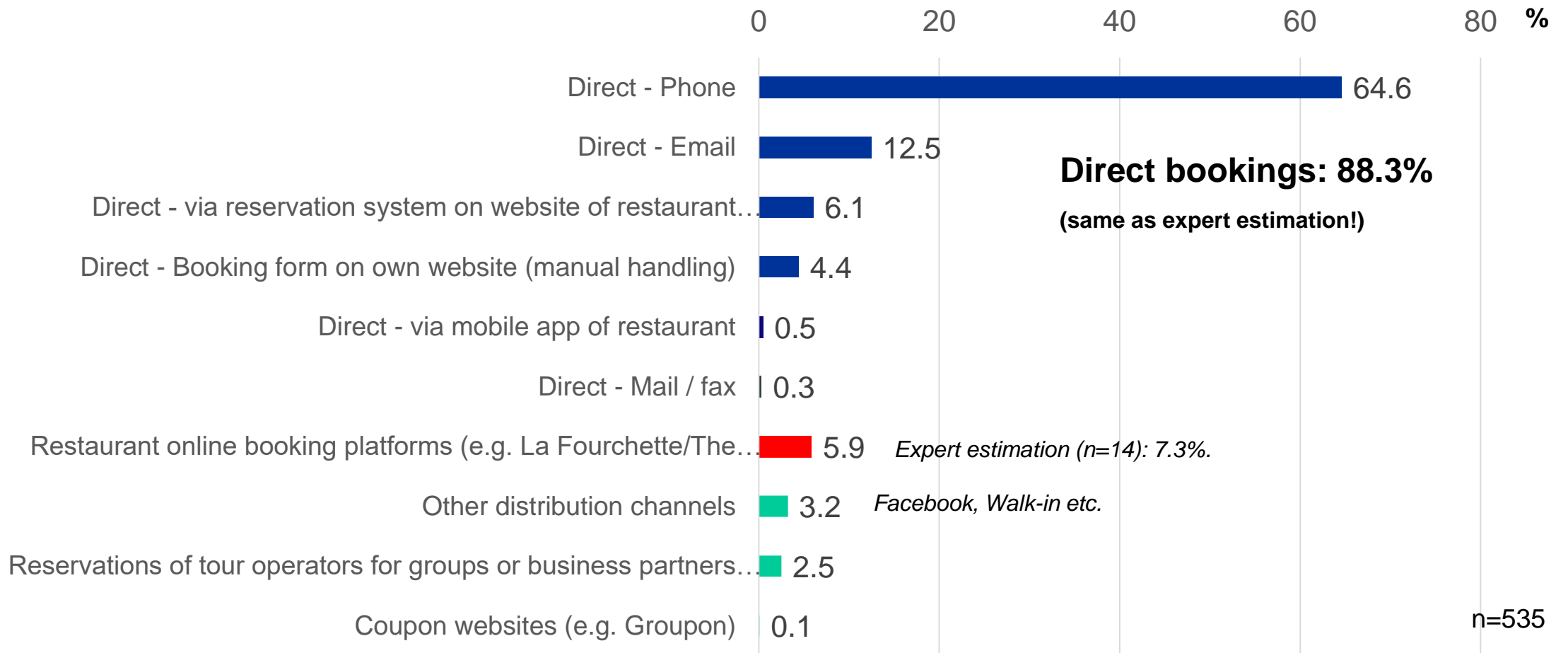
Restaurant Survey: Responses by Country



Percentage of guests in restaurant in 2017 who booked a seat in advance



Distribution channels for advanced restaurant bookings



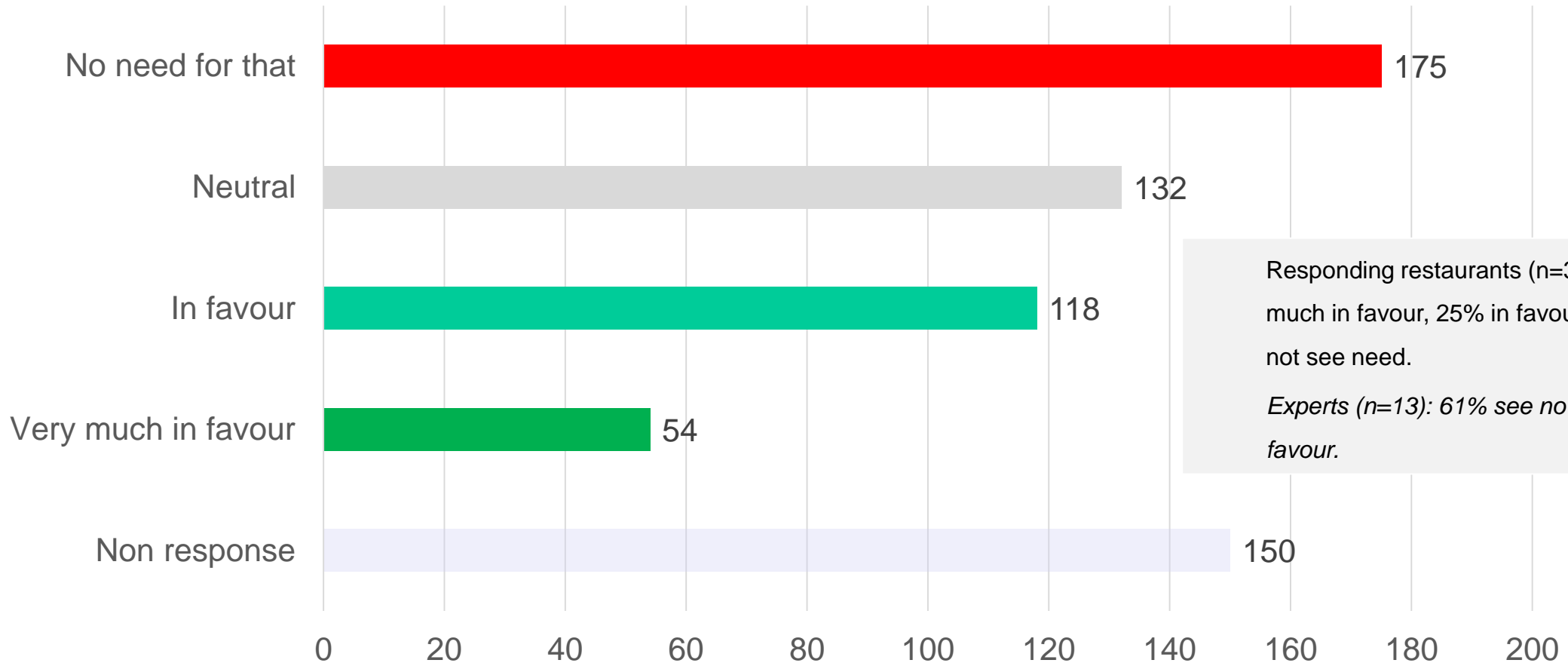
Evolution of reservations via restaurant online booking platforms over the past 3 years



n=595



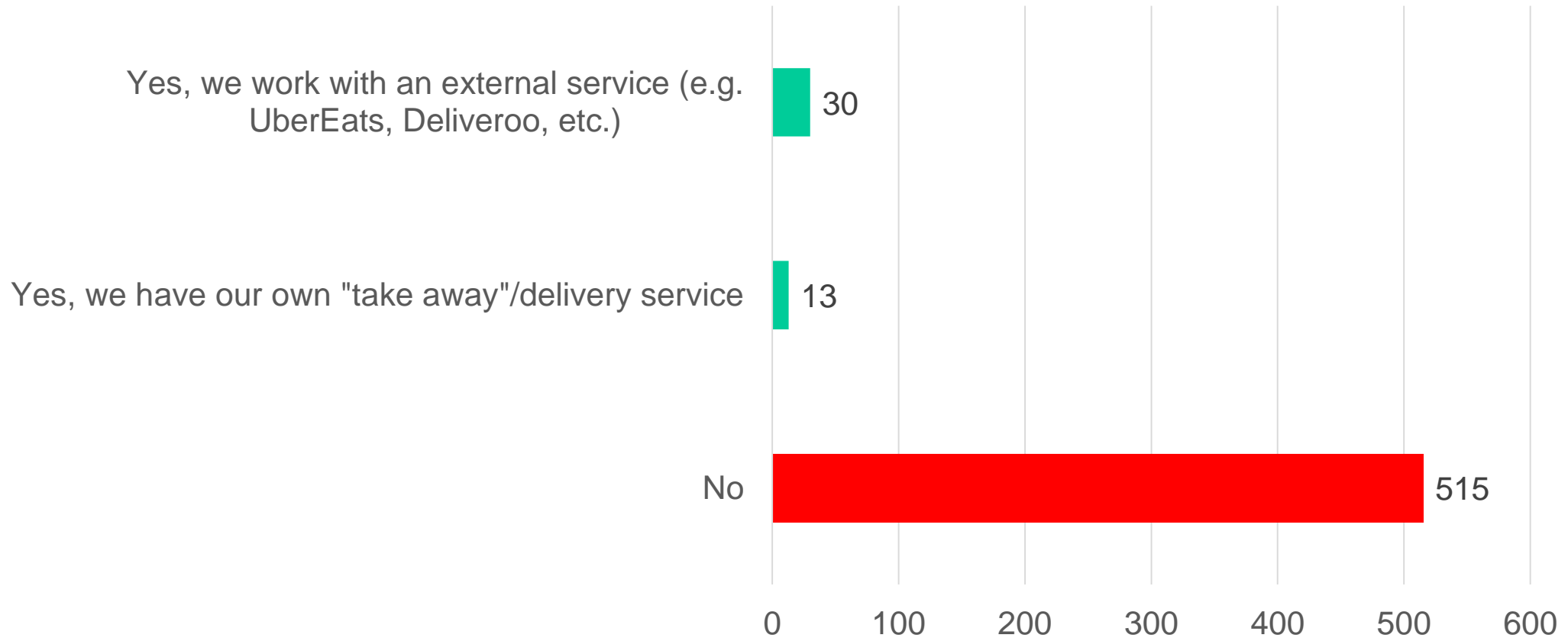
Perception on an industry-led restaurant booking platform



Responding restaurants (n=329): 11% very much in favour, 25% in favour and 37% do not see need.

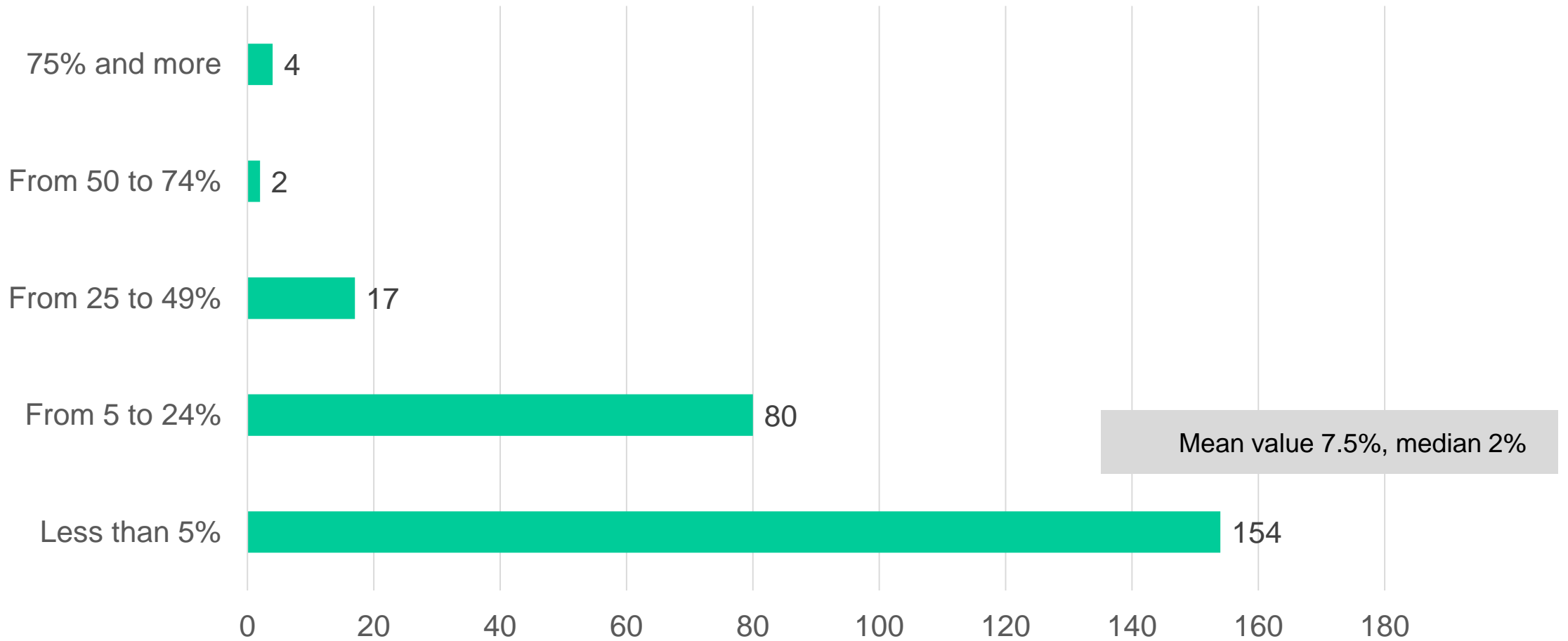
Experts (n=13): 61% see no need, 39% in favour.

Work with food delivery service



Responding restaurants (n=557): Only 7% of restaurants work with delivery services (5% with external services)

Percentage of turnover in 2017 generated by take-away and food delivery services



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Preliminary Conclusions (I)

Evolution of the online restaurant reservation portals & market shares of different direct and indirect distribution channels for advanced restaurant bookings

- **45%** of guests in restaurant in 2017 booked a seat in advance
- **88%** of advanced bookings through **direct channels**
- **6%** of advanced bookings through third-party portals such as LaFourchette/TheFork
- **70%** of restaurants working with these portals have seen a slight to strong increase in bookings over the past 3 years
- Nearly **20%** of restaurants offer third-party booking options on their website and only 11% have an own reservation system (70% rely on telephone, mail etc.)

Preliminary Conclusions (II)

Evolution of the online restaurant reservation portals & market shares of different direct and indirect distribution channels for advanced restaurant bookings

- **TripAdvisor**: 5% of restaurants in Germany and 20% in France can be booked online on TripAdvisor via third-party portals
- **Germany**: 8% of restaurants can be booked on **OpenTable**, 5% on Bookatable (Michelin) and 3% on Quandoo
- **France**: 4% of restaurants can be booked on **OpenTable** and 18% on La Fourchette
- Only **minor support for an industry-led restaurant booking portal** (36% in favour, 28% neutral, 37% against)

Preliminary Conclusions (III)

Market share of the individual restaurant booking **platforms** in the restaurant booking market

- **Empirical data do not allow to estimate market shares** (only few and incomplete data)
- **Relevant players** on the restaurant booking platform market

Booking Holding



Meta-search player



Preliminary Conclusions (IV)

Evolution of the online **restaurant booking platforms** and **food deliveries** market

- No study found yet on the evolution of the restaurant booking platform market.
- The food delivery market has an estimated 28 billion \$ turnover in Europe in 2018 compared to 410 billion \$ for food and beverage service in Europe -> **7%**
- Only **7% of restaurants in survey** work with **food delivery services** for a median **turnover of 2%** (compared to overall revenue)
- Case study **Germany and France**: **10%** of restaurants offer a delivery service **on own website** and **23%** a take-away service.
- Delivery service can be ordered in **7%** of restaurants in Germany and **3%** of restaurants in France on **TripAdvisor**

Preliminary Conclusions (V)

- Restaurant booking portals and online delivery services are still in an early stage
- But given change in consumer behavior (milenials, generation Z, etc) and technology evolution (penetration of mobile technology), the growth potential of this players seem to be big

UBS says Uber Eats-obsessed millennials could kill the kitchen

Shona Ghosh 20 Jun 2018, 03:23

- Behind many of the actors in this market (La Fourchette -> TripAdvisor, OpenTable -> Booking Holding) we can find the global travel players

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eTourism news: www.etourism-monitor.ch

Tourism Observatory: www.tourobs.ch

Bachelor of Science HES-SO in Tourism in German, French and English

<http://tourism.hevs.ch>

EMBA en innovation touristique: www.innovation-touristique.com





Merci!

