BERNARDO MENDONÇA ANDRADE RODRIGUES

Licenciado em Economia

A NEW MARKETING MIX FOR SMALL VIRTUAL RESTAURANTS

A SIMPLIFIED MARKETING MIX APPROACH WITH CASE STUDIES ADAPTED FOR SMALL VIRTUAL RESTAURANTS

MESTRADO EM CIÊNCIAS GASTRONÓMICAS
Universidade NOVA de Lisboa
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DEPARTAMENTO DE QUÍMICA

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"In a dark place we find ourselves,
and a little more knowledge lights our way."
– Yoda –

RESUMO

Online Food Delivery é o processo de encomendar comida através de um website ou de aplicações de telemóveis. O comércio electrónico tem crescido nos últimos anos, e a indústria das refeições prontas a comer não é excepção. As plataformas agregadoras de restaurantes remodelaram o mercado da restauração originando o nascimento de dois tipos de estabelecimentos: Dark Kithens, cozinhas fechadas ao público que funcionam como um centro de confecção de refeições para pedidos online de Food Delivery e restaurantes virtuais, que geralmente operam em Dark Kitchens e são restaurantes exclusivamente digitais sem sala de serviço, produzindo diferentes tipos de comida para vender através de aplicações de telemóvel e outros canais online.

Os restaurantes virtuais, comparativamente aos tradicionais de "tijolo e argamassa", têm benefícios, como custos operacionais fixos e de pessoal mais baixos. No entanto, têm que suportar as altas taxas de comissão cobradas pelos agregadores (Aplicações de Food Delivery) e, sem presença física, é lhes difícil criar uma ligação emocional com os seus clientes. O marketing torna-se, assim, um aspecto fulcral do negócio.

O benefício de poucos empregados também pode ser o “calcanhar de Aquiles”. Para pequenos restaurantes virtuais, o marketing pode ser uma sobrecarga de trabalho ou uma competência que não têm.

Esta tese, baseada no marketing mix tradicional e moderno, procura um novo modelo simplificado e adaptado a restaurantes virtuais, chamado Dynamic C's, com a intenção de facilitar e acelerar o marketing dos restaurantes virtuais. Esta tese contempla casos de estudo, para duas possíveis marcas de restaurantes virtuais a operar na mesma cozinha e um estudo de mercado, através de um inquérito, ao qual 438 pessoas responderam, que serviu de apoio à criação destes casos de estudo e ajuda a fornecer uma visão geral do mercado de Food Delivery em Portugal.

Keywords: restaurantes virtuais, cozinhas fantasma, cozinhas escuras, marketing mix, entrega comida online, aplicações entrega comida

ABSTRACT

Online Food Delivery is the process of ordering food from a website or mobile applications. People around the world are increasingly turning to online ordering and food is no exception. Food delivery apps are reshaping the restaurant industry and originated the birth of two types of digital culinary establishments: first, dark kitchens, with no retail presence, serve as a meal preparation hub for delivery orders; second, virtual restaurants, that operate in dark kitchens, are digital-only restaurants without a dining room that sell on delivery apps and other online channels. Comparing to traditional "brick-and-mortar" restaurant business model, virtual restaurants have their own set of benefits, like lower operating, fixed and staff costs. However, they have to support high commission fees charged by Food Delivery Apps and, since they live in a digital environment, it is difficult to create an emotional bond with their customers. Having no physical presence, marketing becomes a crucial aspect of the business.

One of the benefits of virtual restaurants can also be its Achilles' heel. Small virtual restaurants operate with little or no staff and the owners take care of operations. This means marketing can be overwhelming or just a skill set they don't have.

This thesis, based on traditional and modern marketing mix tries to create a simplified marketing mix adapted for virtual restaurants. This new model, called the Dynamic C's, can be easily and quickly done and help virtual restaurants improve their marketing game. This thesis also contemplates two marketing plan Case Studies for two new possible virtual restaurant brands operating in the same kitchen. A quantitative market research was done with a survey which 438 people responded. This research supports the Case Studies marketing plans and provides an overview of the Portuguese food delivery market.

Keywords: virtual restaurant, ghost kitchen, dark kitchen, marketing mix, online food delivery, food delivery apps

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Acronyms Index

FCT	Faculdade de Ciências e Tecnologia
SI	Sistema Internacional de Unidades
UNL	Universidade Nova de Lisboa
OFD	Online Food Delivery
FDA	Food Delivery App
POS	Point Of Sales
ARPU	Average Revenue Per User
CMS	Content Management System
CRM	Customer Relationship Management
SEO	Search Engine Optimization
DOP	Denominação de Origem Protegida (Protected Designation of Origin)
UX	User eXperience
PR	Public Relations
UGC	User Generated Content

1 INTRODUCTION

The business of delivering restaurant meals to homes is undergoing rapid change as new online platforms race to capture markets and customers across the Americas, Asia, Europe, and the Middle East (Hirschberg et al., 2016). Online Food Delivery (OFD) expands food choice and availability, allowing consumers to order from various food delivery platforms and restaurants with a single click on their mobile phone. COVID-19 pandemic has drastically impacted online food orders in Europe and the OFD market has shown tremendous growth during this period. (Businesswire, 2021)
The market is booming and where there's growth, players, new or old, start to move, trying to get a slice of the pie. Companies from outside the industry, from FinTech (payment gateways and digital wallets) to autonomous technology companies (using ground robots to make commercial automated deliveries) are entering the market (Singh, 2019). In the restaurant business, traditional restaurants are trying to adapt to this evolution and new virtual restaurants are popping up in major cities.
Online food delivery is a prime example of e-commerce disrupting a traditional market (Collison, 2020). No longer must restaurateurs need to rent space for a dining room. Virtual restaurants only need a kitchen and sell their food through Food Delivery Apps (FDAs), social media or their own websites and digital platforms.

There are two main goals in this thesis:

1. To adapt the traditional Marketing mix P's and the recent Digital Marketing strategies to create a new Marketing Mix for small virtual restaurants.

Big food industry corporations that launch new brands and restaurants have their own big marketing departments of consulting firms helping them with their strategy. Small entrepreneurs that are starting their new (virtual or not) restaurant don't have this kind of support and time to spend on big market analysis and marketing plans. The first goal of this thesis is, therefore, to create a simple and pragmatic marketing model that will help small entrepreneurs develop their marketing strategies.

2. To create a marketing-based approach Case Study for two brands, that can coexist in the same kitchen, to help new or small-sized virtual restaurant build their own food delivery service brands.

As we will see further on, marketing is arguably the most important activity for a small virtual restaurant. By providing Case Studies of the new marketing mix for virtual restaurants, it will be easy for entrepreneurs to adapt their own marketing or create a new go-to-market strategy. They can follow the same steps and structure of the Case Studies given, and create their own marketing plan.

To have a better understanding of the Portuguese consumer OFD market, quantitative research was done, aiming to quantify the topic and define results by analysing the collected data generated from the survey. The market survey intended to provide a basic idea from the consumer side of the food delivery industry in Portugal, mainly in Lisbon area, analysing customers' purchasing habits and preferences regarding Take Away and FDAs (Food Delivery Apps).

This thesis is based in a combination of "old school" marketing from Philip Kotler's book - Marketing Management: Analysis, Planning, Implementation, and Control (Kotler, 1994)) and the new Digital Marketing based in Dishek J. Mankad’s book - Understanding Digital Marketing (Mankad, 2018).

2 BACKGROUND AND TRENDS

2.1 Food delivery and take away past, present and future

Meals purchase approach has evolved in recent years. Figure 2.1 shows the evolution and trend for OFD (Online Food Delivery) services between 2017 to 2024, revealing a clear upward trend that shows rapid expansion of Food Delivery. Restaurant-to-consumer delivery revenue is food delivery sold directly by restaurants and Platform-to-consumer is food delivery sold via third party apps like Uber Eats, Glovo or Deliveroo. Both segments rose in terms of sales, but while restaurant-to-consumer grew at an average rate of 17% from 2017 to 2020, platform-to-consumer grew at an average of 26% and in 2020 grew 32%. Obviously, we have to take into account that the health crisis started in 2020 fostered this growth, but according to the projections, although not at the same pace, revenue of OFD industry will keep growing for the years to come.

Revenue evolution and forecast for the Online Food Delivery market worldwide from 2017 to 2024

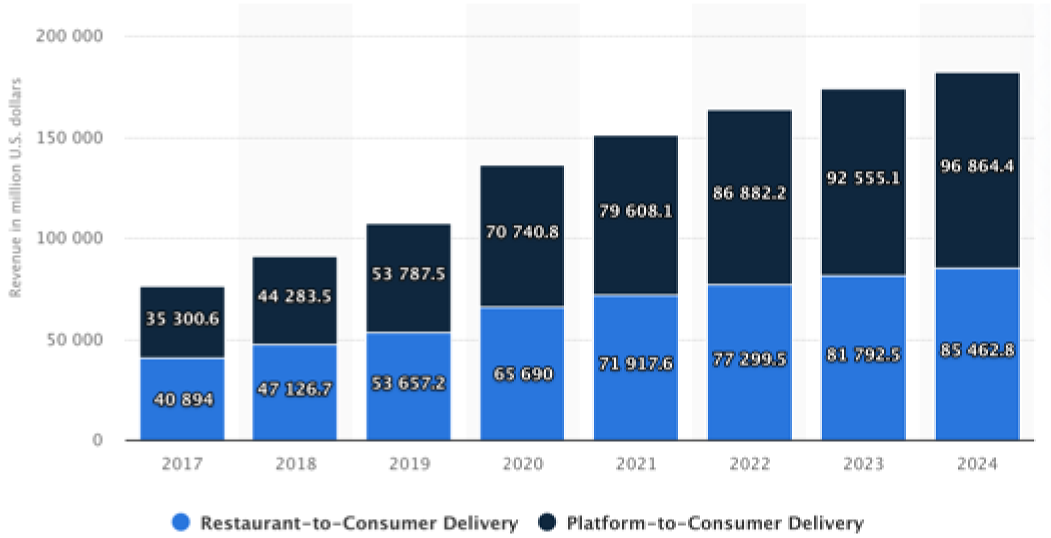


Figure 2.1 - Revenue evolution and forecast for the Online Food Delivery market worldwide from 2017 to 2024 (Statista, 2021)

The OFD market consists of sales of food, ordered online for household consumption, primarily, mostly ready to eat. Customers don't have to go to a restaurant to eat its food anymore. The massification and development of technology, especially with the widespread use of smartphones and the internet, allows customers to choose and order almost any food they want, at any time and, comfortably, receive it where they want to eat it. Things that seemed impossible 30 years ago, now are part of a normal urban lifestyle.

Regarding food delivery, a lot has changed since Pizza Hut launched the first-ever pizza online order back in 1994 (David et al., 2019). Some (Nowak, 2014), argue that the first food delivery was also a pizza, but in 1889, when Queen Margherita visited Naples, Italy. Instead of French Cuisine, she asked to eat the same as Italian commoners' food. Three different pizzas were brought and her favourite was named after her, the now world-famous Pizza Margherita.

The first exclusive online food delivery firm, Grubhub, was founded in 2004, initially with the goal of replacing all paper menus with a single website (Collison, 2020).

Delivery-only establishments in the United States date to, at least, 2013, when a start-up, the Green Summit Group, began working on a ghost kitchen in New York. With Grubhub's backing, Green Summit produced food marketed online under brand names like Leafage (salads) and Butcher Block (sandwiches) (Isaac & Yaffe-Bellany, 2019).
The increase in smartphone users has given a boost to online food delivery services worldwide. Smartphone users are the primary online shoppers for the F&B industry and their rising numbers reflects a potential increase in online shopping for food and beverages. (The Business Research Company, 2021).
Big chain restaurants started expanding their service through food delivery having a vertical operation from sales to distribution. Some tech companies like Uber Eats, Takeaway.com or Deliveroo, saw an opportunity and started up and rose, reaching almost every urban corner of the world and providing a service to every restaurant, no matter how small it is. These platform aggregators have gained track over the last years, especially in densely populated regions. (Li et al., 2020)
These FDAs (Food Delivery Apps) are third-party platforms that facilitate delivery for restaurants. They work as a sales channel and provide distribution (Deloitte, 2019).
There is an expanding trend of online sales among many fields, but the food industry is one of the most relevant, since it is the closely linked to people's daily life (Moondra et al., 2020).
New virtual and mixed (brick and mortar restaurants also producing for take away and delivery) restaurants are popping up, taking advantage of these new sales channels, that had seen a rise in popularity since Covid-19 (Gavilan et al., 2021)

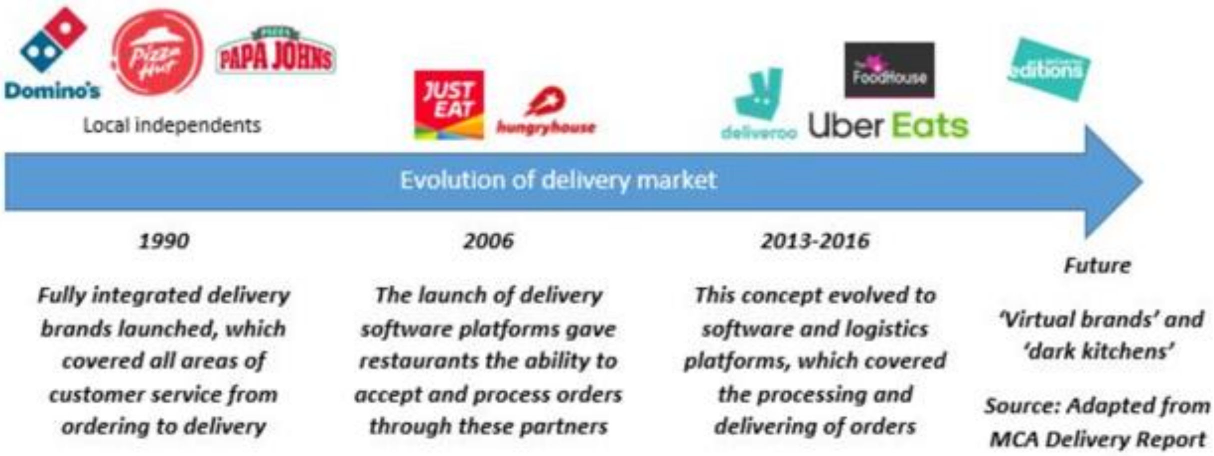


Figure 2.2 - Evolution of Food Delivery (Malley, 2019)

Figure 2.2 is a simplified timeline of OFD business showing, in just 20 years, the way to get food at home has evolved.
Going forward to 2017, 43% of individuals who ordered online food delivery services, in the USA, said that it replaced an in-person meal at a restaurant. This figure increased 38% from the previous year. (Collison, 2020). The OFD business model has seen a huge success due to easy decision making and convenience for the customer to select the food from a menu. (Trioangle Technologies, 2018).
According to Statista, revenue in the Online Food Delivery segment is projected to reach €271,684m in 2021, worldwide. To have a better growth perspective, the revenue is expected to grow 16.6% in 2022 and has an annual growth rate (CAGR 2021-2025) of 10.01%, resulting in a projected market volume of €397,856m by 2025. These numbers were reviewed in July 2021.

In March 2021, by the time these data started being collected for this thesis, the projected revenue was 128,890m compared to the €271,684 in July. This means that there was a 110% increase on projected revenue for online food delivery.
Projections always vary depending on the publication, date and source. But most of these projections have one thing in common: expected growth.

"Food delivery is here to stay, or better yet: to grow."

(Durbin, 2021)

Worldwide, the average revenue per user (ARPU) in the Online Food Delivery segment is projected to amount to €135.82 in 2021 and user penetration will be at 26.5% in 2021. The expected number of users is 2,897.1m users by 2025. (Statista, 2021). Since March 2021, the projections show bigger figures all around: ARPU from €107 to €135 and user penetration from 17.8% to 26.5%.

2.2 OFD market in Portugal and some reference countries

The success of OFD also means the industry environment is highly competitive.
Moreover, customers all around Europe generally demonstrate high price sensitivity toward goods and an intensive search for best price deals and quality (Martinez, 2014).
The study "Let's make a deal", (Parago, 2014) revealed that, in the UK, price is five times more important than other factors to 75% of the customers.
In the Eurobarometer study about consumer habits in Europe (Figure 2.3), "45% of the respondents say that taste is the most important factor in their food purchasing decisions, followed by food safety (42%) and cost (40%)" (European Commission, 2020). In a closer look to Portugal, this study reveals that 59% of Portuguese said that taste is one of the top three most important things. Unfortunately, the first concern is price and cost for 70% of respondents.

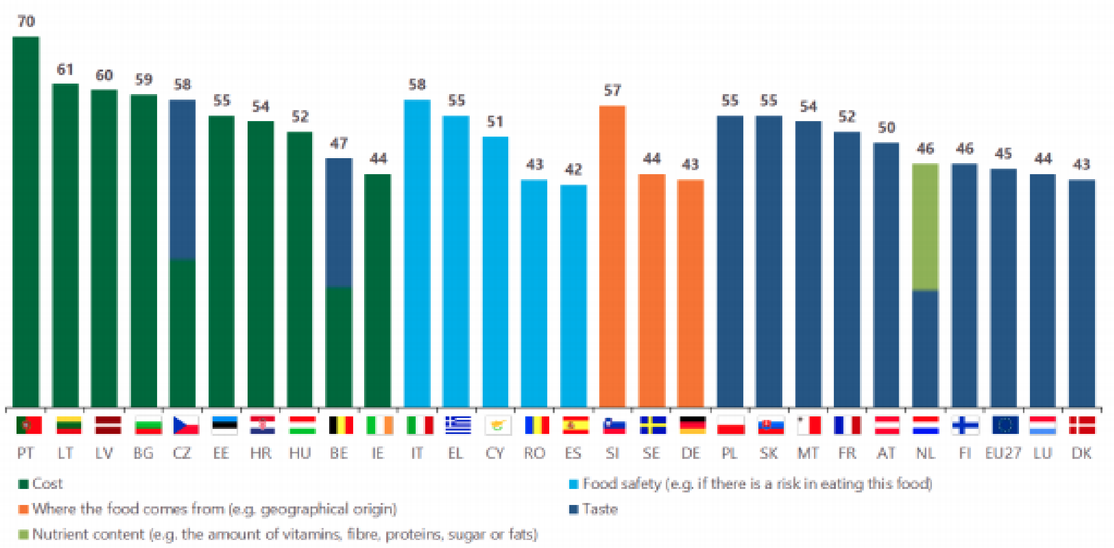


Figure 2.3 - Key drivers influencing consumer food purchase- Eurobarometer Study (European Commission, 2020)

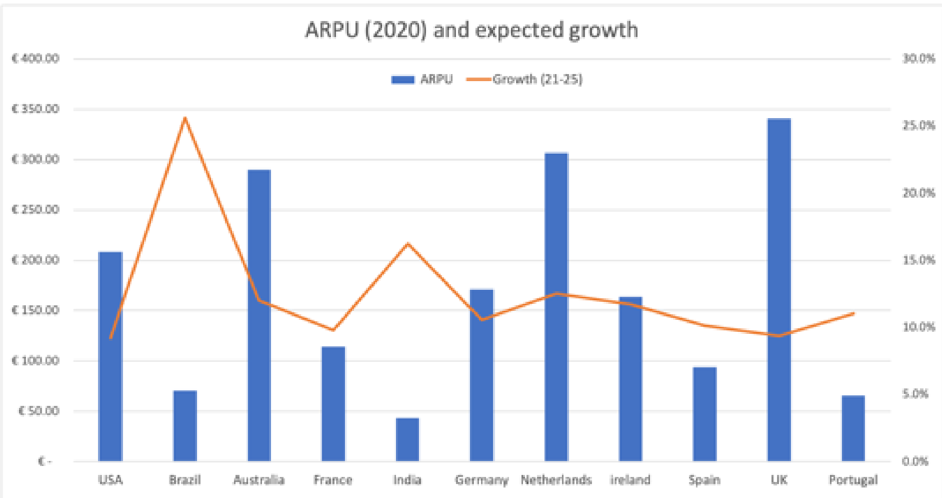
In Portugal, Comer em Casa was the first company to offer a platform for restaurant delivery, in 2014, followed only about six years later by noMENU.
Telepizza is the major player in the OFD industry, operating in Portugal since 1992 (Telepizza website, 2020). Lisbon experienced a significant shift in food delivery when in 2017, the FDAs Glovo and Uber EATS, and in 2018, Takeaway.com started their operations in the city (Dolibog, 2020).

Until then, food was mainly ordered via phone call and exclusively delivered by restaurants themselves or customers would order in advance and pick it up at the restaurant (take away). Those “traditional delivery” restaurants were disrupted and forced to adapt to the new digital reality. The new FDAs channels have enabled restaurants to connect with people more easily and deliver food more conveniently to their homes or workplaces.
If, before Covid-19 growth was already projected for 2020 and the following years, the health crisis accelerated online commerce, and food delivery wasn’t an exception. In Portugal, the Covid-19 health crisis has had a tremendous impact in restaurants (Banco de Portugal, 2020). Many restaurant owners have created restaurants only for food delivery and virtual restaurants were born.
According to Statista (Statista, 2020), Table 2.1 shows projections for the Portuguese market. These figures reveal that OFD Portuguese market is still a bit far from maturity. Although the expected growth is in line with other European countries, the Portuguese starting point is still far behind. User penetration in only 11% for platform-to-consumer and the ARPU is one of the lowest in Europe.

Table 2.1 - Food delivery in Portugal (2021 projections)

	Revenue (2021)	*Growth (21-25)*	*Users (2021)*	*Penetration (2021)*	*Penetration (2025)*	*ARPU (2021)* [1]
Platform-to-customer	€ 72 m	11%	1.1 m	11%	16%	€ 64.69
Restaurant-to-customer	€ 71 m	12%	1.5 m	15%	22%	€ 46.55

Figure 2.4 presents a comparison with other markets, looking only at data for Platform-to-consumer deliver. Although there is a good expected growth for 2021 and 2025, Portugal has still a long way to go to be as mature as other countries like USA and UK. Also, Portugal is one of the few countries where the revised data from projected growth and ARPU did not increase from March to July 2021. Nevertheless, the expected growth is similar to other OECD countries, being around 10%. The main concern is Portuguese Food Delivery ARPU being lower than Brazil.



[1] Average Revenue Per User

Figure 2.4 – Platform to consumer ARPU and expected OFD growth per country (Statista, 2021)

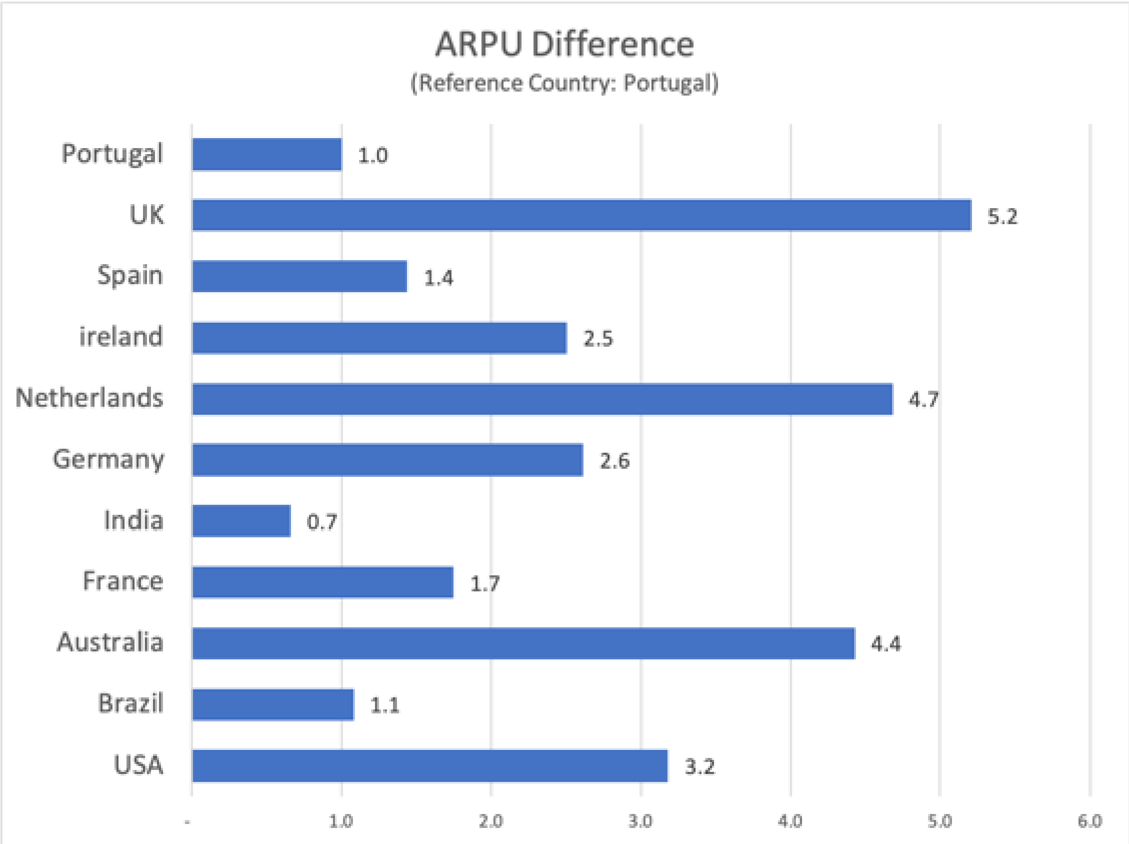


Figure 2.5 - Food Delivery ARPU difference between countries

To better understand the ARPU difference between Portugal and the other reference countries a ratio between the two values was made. Figure 2.5 show the results of this ratio where countries like UK, Netherlands and Australia have 4 or 5 times higher ARPU than Portugal.

With similar growth rates, Figure 2.6 shows market penetration forecasts for 2021 and 2024. Portugal in 2024 is not forecasted to reach the same penetration as the above-mentioned countries have already in 2021. From these reference countries, only India has a smaller ARPU than Portugal, but with an expected growth rate of 16.2%.

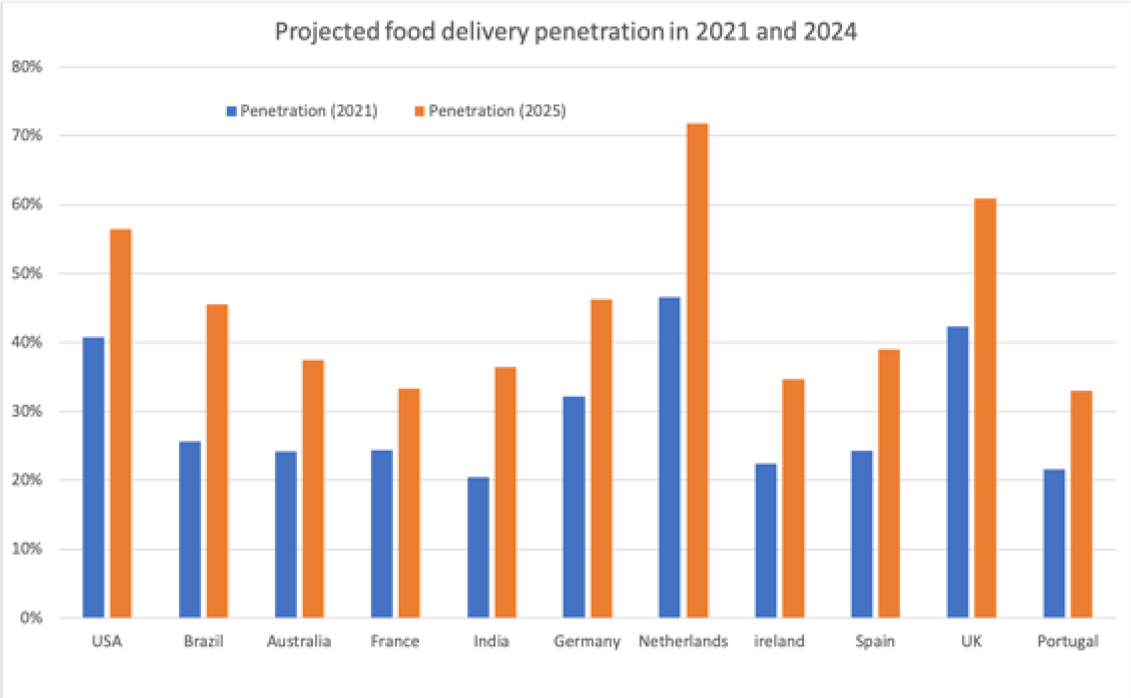


Figure 2.6 - Projected food delivery penetration per country (Statista, 2021)

The countries for this comparison were chosen based on best benchmarks in terms of cultural similarities of western culture. The outsider is India because it is one of the fastest rising markets, not just in terms of expected growth but also in terms of new food delivery aggregators, virtual restaurants, dark kitchens and technology.

2.3 The OFD Customer Journey

OFD services also seem to be favourable to customers because of its speed, ease and precision of orders (Verma et al., 2009 cited by (Yeo et al., 2017)).
According to the MCA Foodservice Delivery Report 2018, there are 4 stages to the consumer purchase journey for OFD (Online Food Delivery). A new virtual restaurant must focus on ensuring the best experience at all stages (MCA, 2019):

Step 1 – Deciding what to have

Figure 2.7 shows how this stage can also be divided or segmented. There are consumers that before deciding what to eat, go to their preferred FDA and browse around. Others, search the web or social media first. There are consumers that have decided the type of food they want (for example Sushi) and they search in several FDAs and/or web/social media.
Therefore, the competition for attention is fierce, since the FDAs and web/social media is overpopulated with new, and old, brands fighting for the same thing: a couple of seconds of consumers attention.

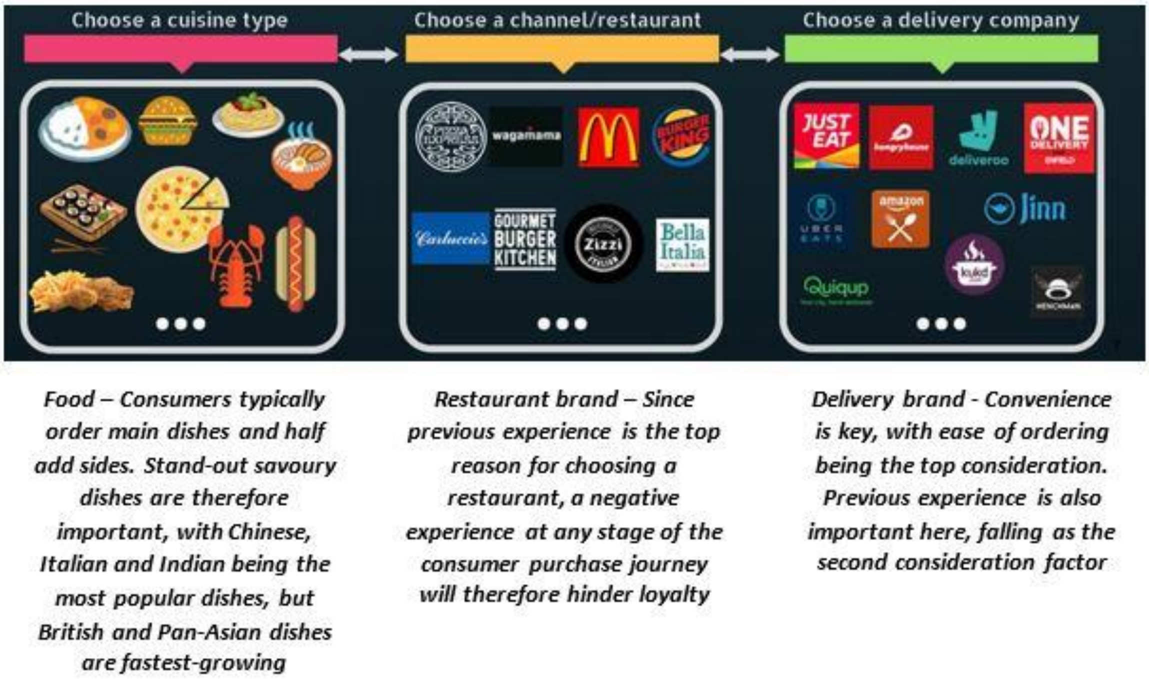


Figure 2.7 - Customer journey – Buying decision (Malley, 2019)

Step 2 – Ordering

FDAs popularity is rising, but online and phone options remain the main ordering methods for certain consumer demographics (Malley, 2019). The use of promotional offers when ordering is increasing and is a mechanism to encourage people to try something new. According to the survey done for this thesis (Figure 5.4), 43% of the respondents said that calling by phone is the first or second preferred way to order food delivery or take away.

Step 3 - Delivery

This is one of the biggest challenges for virtual restaurants if they use third party platforms and delivery drivers. If, on one hand, they don't have to worry about the logistics and process, on the other hand they don't control the end part of the process and don't have access to the customer and customer data. The average delivery time set by the FDA can take longer because of the driver. The food can be already processed and packed, getting cold while it's waiting the pick-up. It is key that consumers understand this process and that restaurants are not directly to blame with bad reviews that have a significant impact on FDAs algorithms.

Step 4 – Consumption

Food quality and taste are the most important criteria for a takeaway delivery experience. As seen before, only packaging can create a different emotional appeal, apart from the raw primal human senses: aroma, texture and taste of the food. Any bad experience can reflect badly on a brand and loose that customer forever. The virtual restaurant must monitor the appearance, temperature and spillages of their food as much as they can.

3 THE RISE OF DARK KITCHENS AND VIRTUAL RESTAURANTS

As we have seen, the ability to sell in new channels presents new revenue streams for restaurants. Meanwhile, new types of restaurants such as “kitchen-only” or “delivery-only” have emerged allowing existing restaurants to expand their geographic area or new businesses to appear (Deloitte, 2019).
After pouring more than $20bn into food delivery platforms like Doordash, Deliveroo and Swiggy, investors are now looking at the other side of the table: how to make sure the right food is available at the right place, at the right time, to be delivered (Bradshaw, 2019).
The success of online platforms such as Uber Eats, Glovo, Deliveroo among others, paved the way for the appearance of Dark Kitchens. In Portugal, dark kitchens like WEAT, Dark.pt, Cookoo and Kitch started up and are the ground to many people recreating old and creating new concepts to start a new virtual restaurant, seeking the increasing online demand for meals (Lito, 2021).

3.1 Dark kitchens

Dark kitchens, also known as ghost and cloud kitchens, are places where food is prepared at a separate premise from their direct customers, unlike traditional “brick and mortar” restaurants. Compared to the traditional takeaway (takeout) format, orders in dark kitchens are usually placed online, without the option for the public to enter the premises.
These workspaces are usually windowless which, coupled with the fact that consumers often aren’t aware that their food has been made here, gave the name dark, cloud or ghost kitchens. Being rather a new concept, a dark kitchen is commonly used by a restaurant that does not have direct service to customers: virtual restaurants.
Therefore, dark kitchens can be closed and private units where one or more than one brand of food, under the same company or a community kitchen, shared by different individuals or companies.
The current concept of the cloud kitchen initially emerged in India, in 2003, with Kebabs (Naveen Sharda, 2020). More recently, Travis Kalanick, who was the CEO of Uber until 2017, founded Cloud Kitchens, raising 20 million USD (Ary Levi, 2020).
Dark kitchens also appeared in the Portuguese food industry operating under different Business Models. In 2019, Cookoo, a recent Portuguese company and brand, was amongst the first dark kitchens in Portugal and has a complete vertical operation, where a unified kitchen produces for several brands with their own aggregator platform and distribution logistics (Garcia, 2019). In the same year, another new company, WEAT Gastronomic Hubs started renting their fully operational kitchens to virtual restaurants (Lito, 2021). Kitch, a Portuguese company, was also amongst the first dark kitchens, but they changed their business model, repositioning itself as a technology service for catering, with the mission of helping independent restaurants in the transition to digital, giving up on real estate infrastructure, rising USD 4 million recently (Castro, 2021) and being already operating in Spain.

3.2 Virtual restaurant

News of big rounds of investments occurring in digital restaurants are part of our lives now (“Virtual Restaurant Start-up Lands $7M in Funding | Fast Casual,” 2021). No longer restaurateurs must rent space for a dining room, since all they need is a kitchen, or even just part of one. (Isaac & Yaffe-Bellany, 2019).
A virtual restaurant is basically a kitchen-only restaurant that produces food for food delivery and/or takeaway (take out). They have no immediate service and no tables or places for their

customers to sit and enjoy their meal. The idea of the virtual restaurant, free of the weight of a brick-and-mortar dining room, is catching fire (Dai, 2016)
There several advantages of virtual restaurants, when comparing to traditional "brick & mortar" restaurants. But also, some important trade-offs.

3.2.1 Virtual restaurant advantages

Less costs

Not serving customers directly drastically decreases operating costs while increasing convenience for the customers. Fewer employees are needed and the cost of real estate is much lower. (Dephna, 2020)

Test new concepts

Another key advantage of a virtual restaurant in a dark kitchen is the ability to easily test new brands, menus and concepts. There are no physical assumptions to be taken into account when consumers' food trends change. Virtual restaurants can quickly change to a completely different menu or concept at any time, adapting in the best way and without great cost to the demanding needs of their customers (Fast Casual, 2021). If a brand has not sufficient demand, the same company can simply create another one and try again.

More flexibility and adaptability

Virtual restaurants are able to easily adapt to the seasonality of demand and even have a different concept for each time of the year (Isac M., 2019).
In terms of technology, virtual restaurants use the data provided by their customers to improve their marketing, use direct forms of communication and have greater adaptability in real time to demand (Kapoor, 2018).

Process optimization and better efficiency

There is a huge optimization of processes and efficiency. As companies focus only on food preparation processes, without having to worry about the complexity of managing an entire restaurant, such as service employees. They are able to automate and optimize their food processing processes production. This efficiency is essential to fight on equal terms with larger companies, that already have these economies of scale. (Gouveia, 2021)

Big Advantage: Multi-brand

Multibrand is the way to become sustainable (Indian Retailing, 2020), since it's a diversification of risk and a way to share fixed and a lot of operating costs between two or more brands.
A virtual restaurant cannot replace the experience of a traditional restaurant. However, having two or more brands operating in the same dark kitchen is unknown by the customers. This doesn't affect brands' credibility. A traditional restaurant that offers sushi and pizza does has not the same immediate perceived quality as a sushi only or pizza only restaurant, even if is the food is exceptional. In a virtual restaurant, as long as it doesn't affect operations, the quality of the brand is perceived mostly by the food quality.
If one of the brands does not perform well, a virtual restaurant can easily create another brand, with different products, without a major change in their operations. This way, a virtual restaurant has other brand(s) that gives the business the financial sustainability needed, while testing other concepts.
This shift is hard to do in a traditional "brick and mortar" restaurant, but it can be done overnight in a virtual restaurant.

3.2.2 Virtual restaurant disadvantages

Emotional connection lost

As the purchase process is often made through online platforms, face-to-face contact between the restaurant and the customer disappears. Restaurants miss an opportunity to communicate with the customer, read his non-verbal language and anticipate what he looks for and wants, in order to guarantee his satisfaction.

(almost) Nothing but the food

The virtual restaurant food concept will be judged by customers mainly by the quality of the food. A traditional restaurant can have charm and an associated environment that takes the dining experience beyond food. According to the Economist, "people go to restaurants not just about the food. Some restaurants impose a certain kind of experience on the diner (…). A restaurant is an extension of yourself, or a vehicle to express yourself." (Hitchings, 2020)

Correct wrong orders

If a virtual restaurant food delivery is not equal to the customer's request, restaurants have no quick way to exchange it, as in a traditional restaurant. Much less to offer a glass of wine to compensate late orders from the kitchen. Other times the customer himself made a wrong order because he missed click on the buttons or did not fully comprehend the menu. In a traditional restaurant it is easy to correct mistakes made by customers. Either waiter can correct or advise the customer when ordering, or later, just by cooking the correct dish (Gouveia, 2021)

Lack of control of the entire process

Sometimes, if ordered via a FDA, food delivery is dependent on third parties. Therefore, there is less control, from a virtual restaurant perspective, for food to arrive with the quality that came out of the kitchen. A driver can be late or take little care of transportation turning an exquisite gourmet hamburger into a bad bolognaise (Collison, 2020).

Big Challenge: creating an emotional bond

In a virtual restaurant marketing approach, there is no in-person contact with the customer. Therefore, it is more difficult to create an emotional bond with the customer comparing to a traditional "brick & mortar" restaurant and relationship marketing has to be reinvented. Relationship marketing attempts to involve and integrate customers, suppliers and other infrastructural partners into a firm's developmental and marketing activities (McKenna, 1991; Shani and Chalasani, 1991).

In a positive note, there is no need for the involvement of a middlemen, like a salesperson or waiter in this case, allowing the marketing team to contact directly to the customer. Virtual commerce can cut through the costs of interacting with consumers and reduces the information asymmetry between buyers and sellers with potential implications for the marketing service since, in many markets, the ability to obtain information from the Internet is changing the way consumers purchase (Markillie, 2005).

From this viewpoint, the website and social media are important channels to promote the company's brand, products and services and depend less from third-party aggregators platforms, avoiding the high commission fees.

Because relationship marketing is not mutually exclusive to traditional in-person marketing, traditional and new digital marketing techniques can be used, to influence the emotional affiliation with the brand and its perception.

This emotional link is important because "the role of emotions is an important source of information in purchase decision making process" (Bagozzi et al., 2000, cited by (Martinez, 2014)).

4 THE DYNAMIC CS MARKETING MODEL

4.1 Marketing and Strategic Marketing definitions

"Defining Marketing is not easy and direct because different industries relate to different idiosyncrasies of each business. The American Marketing Association (AMA) defines: "Marketing is the activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large."

(American Marketing Association, 2017).

AMA's definitions of marketing and marketing research are reviewed and reapproved/modified every three years by a panel of five scholars who are active researchers.
For McDonald, marketing is "first and foremost an attitude of mind rather than a series of functional activities" (McDonald, 1989). From a non-customers' and results point of view, Drucker stated that "marketing is the central dimension of the entire business." (Drucker. 1973)" cited by (Wilson, 2003); For the authors of the book Strategic Marketing Planning, "marketing should operate at three levels, which are culture, strategy and the set of tactics". (Wilson &Colin. 1992, p.5), cited by (Xin, 2016)).

"Many people associate Marketing only with sales or advertising. But Marketing integrates and combines several activities: marketing research, product development, distribution, pricing, communication, sales and others designed to feel, serve and satisfy the needs of consumers, and simultaneously respond to the company's objectives".

(Kotler, 2004)

4.1.1 Traditional Marketing Mix

In the Marketing Management book, Kotler states that "marketing means working with markets to actualize potential exchanges for the purpose of satisfying human needs and wants". For this author, the core of marketing is the four 4P's, also named marketing mix: **P**roduct, **P**rice, **P**lace and **P**romotion (Kotler, 1994).

4.1.2 Marketing mix expansion

The 7Ps expansion is based on the 4Ps aggregating the changes of the external marketing environment: **P**articipants (or people), **P**hysical evidence and **P**rocess management, as shown in Figure 4.1.

Figure 4.1 - Marketing mix 7 P's - Adapted from “The Marketing Mix 4P’s and 7P’s Explained” (Mark. 2015, cited in (Xin, 2016))

4.1.3 Web marketing mix

The traditional marketing mix 4P's model expresses the following reasoning: Companies produce a certain product, promote it with the intention of informing the consumer of its availability, at a certain sales location, at a certain price.

> *“The 4P's must work together in a single marketing plan to satisfy the customer's needs and allow the firm to make a reasonable profit. Marketing mix elements are often viewed as controllable variables because they can be changed. They also describe the result of the management’s efforts to creatively combine marketing activities.”*

(Zineldin & Philipson, 2007)

The Web-Marketing Mix goes further and identifies four critical strategic, operational, organizational and technical factors of online marketing (Segura, 2009) , the 4 Ss:

- Scope - strategic issues
- Site - operational issues
- Synergy - integration with physical processes
- System - technical questions.

It is, then, important to understand the role of the traditional 4P’s model in the virtual markets, adapting it to the new virtual reality, its customization, interactivity and integrations processes required by modern marketing.

4.2 The Dynamic Cs marketing MODEL

As mentioned, one of this thesis' goals is to help entrepreneurs and new virtual restaurants. The Portuguese OFD market is growing, but at a slower pace and does not generate the same wealth as other more mature markets. With such lower ARPU, creating a small virtual restaurant with a marketing strategy based on best price is destined to failure. It is difficult to fight the economies of scale that large restaurant chains have to reduce costs. Without the big sales volume the profit would be scarce.

Therefore, a new virtual restaurant has to discard this approach, of maximizing efficiency and increasing volume to lower prices, in favour of a more specially designed product to their target customer and have a better relationship marketing. Customer retention and long-term value co-creation also plays a big role in the marketing strategy. The passive and reactive type of relation between customer and company seems to be no longer sufficient (Swinscoe, 2015).

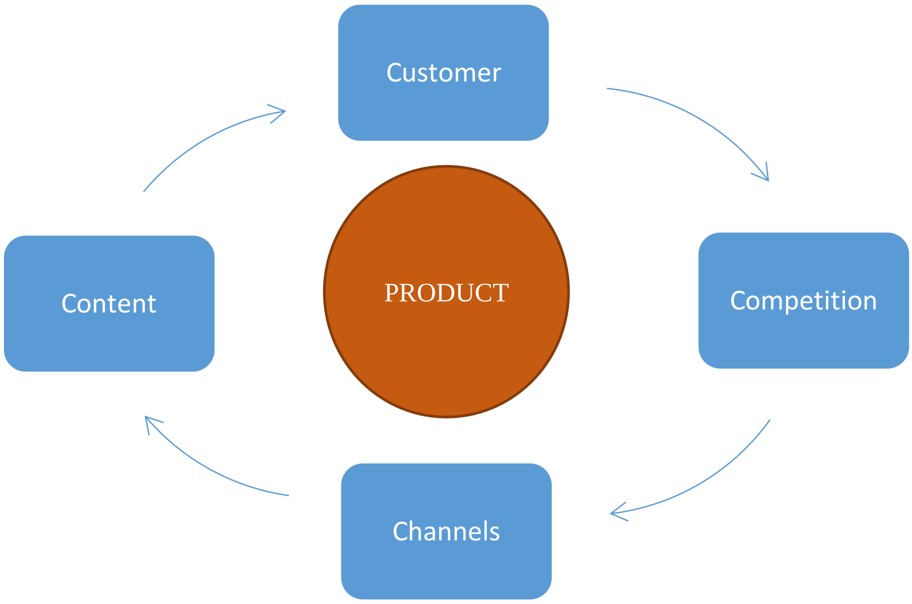


Figure 4.2 - Dynamic C's Model "

The Dynamic Cs (Figure 4.2) is this thesis attempt to create a simple Marketing model for virtual restaurants, based in a combination of the 7Ps and 4 Ss marketing mix.

4.2.1 Product

Creating products is the most complex part of marketing. It is the core of this Marketing model, to which all the other items of the marketing mix are directly linked.

Marketing requirements for a virtual restaurant product must include:

- The customer needs.
- The competition – how can this product be different? Not better, different.
- The production process, time and costs for that product.
- Process integration – how can we incorporate the sales channels into the Point of Sales (POS) software, for example.
- The promotion and emotional potential – content creation for website, social media, digital ads, etc.
- The FDA third party category placement.
- The targeted price.
- The packaging.
- The customer journey for that product.

- The loyalty potential and after sales process.
- The digital and offline marketing content potential.
- The people involved in the entire process from production to sales.
- The physical evidence that that product can provide.
- Where, when and how will the product be selling – sales channels.

Product is the core of this virtual restaurant marketing strategy. If one promotion strategy isn't working, it's not that difficult and costly to change. Same with changing and adapting a strategy to new sales channels and placement. But changing a product can be impossible or extremely hard to do, without compromising the rest of the entire marketing strategy.
The brand will be judged primarily by the product quality since, as we've seen, in a virtual restaurant there aren't many other factors to create an emotional link to a customer.

4.2.2 Customer

A company can have the best product in the world but, if no one wants it, there are no marketing guidelines that will save it. Before launching any product or service, it is important to analyse the market and find what customers want or need. More, it is crucial to segment the market. If big companies do it, it is even more important for small companies, in this case small virtual restaurants. A virtual restaurant, even if it makes hamburgers, cannot compete in the same grounds against MacDonald's. But it can target some type of MacDonald's customers that are looking and keen to try a different kind of hamburger.

"What problem am I solving?

This question helps the marketer search for opportunities in a market and design products for those customers. It is fundamental to look for customer satisfaction that creates value. The idea is that product attributes provide benefits needed to accomplish some desired purpose. (Idassi & Young, 1994). An important issue in customer-oriented marketing area is target selection which enables the determination of potential customers. (Woo et al., 2005).
Consumer perception is undertaken by the companies, in order to understand the decisions made by the consumers and is not only influenced by just one factor. It is the outcome of what the brand says, does, and puts out into the world (Kuo et al., 2009, cited by (Chandrasekhar et al., 2019). A small virtual restaurant must then find a market niche and find marketing strategies to create brand awareness and the desired consumer perception to generate sales.

4.2.3 Competition

In a capitalist society, on the supply side, different players are continuously searching and fighting for customers. The principle of a sustainable competitive advantage argues that a firm can only be successful in the marketplace if its products and services have a competitive edge over those of its rivals. This edge should be one that is both important to customers and sustainable by the firm in the long run (Easton, 1988).
Therefore, the second C (Competition) complements the first C (Customer) to analyse the market on the supply side. What might look like a good business idea can be crowded with suppliers. Entering that market, without innovation, would be difficult to generate profits. Looking, not only for opportunities, but also for what kind of players already are established, allows a better understanding and how to compete and position in that market. Obviously, just looking at Customers and Competition isn't a complete market analysis, but allows narrowing our market perspective in a more practical way, focused on the two main players: Customers and Competitors. A small virtual restaurant might not have the financial capabilities to hire a consulting firm to perform a deep market analysis. But it can look at Customers and Competitors to make better decisions.

4.2.4 Channels

The OFD business has emerged as a relevant channel to reach customers and provide them with higher quality services. (Allawan 2020, cited in (Gavilan et al., 2021)).
Sellers engaged in food industry are looking for new opportunities to serve the customers. (Reddy et al., 2020). Some already established restaurants have remodelled their business strategies on modern digital platform to keep pace with the customer's changing needs and preferences. (Thamaraiselvan et al., 2019).
There are two main sales channels for virtual restaurants.

1. Food Delivery Apps
2. Restaurant Website

Knowing their potential and challenges can make the difference between a successful enterprise or joining the big restaurant graveyard.

Food Delivery Apps

The "traditional" and conventional mode of food delivery wherein customers would call the restaurant or order food online through the websites of restaurants, have now been partially replaced with the concept of "aggregator business model". The FDAs (Food Delivery Platforms) provide a "single window system" enabling customers to order food online from a wide variety of food providers registered on the portal. (Thamaraiselvan et al., 2019).
Online food delivery applications have become popular because of reasons like visible menu with prices, complete information about service, real time tracking of delivery, push notifications, multiple payment options, GPS searching of nearby restaurants, better interface and discounts and deals offered (Reddy et al., 2020).
Figure 4.3 shows why people prefer FDA in some European major cities and the most answered options are related to convenience.

What are the reasons chosen to order food using a FDA?

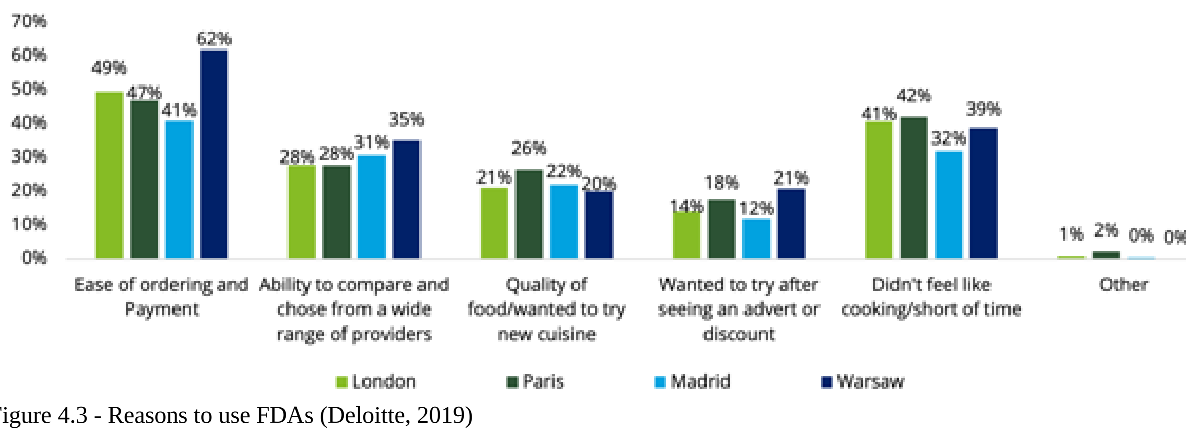


Figure 4.3 - Reasons to use FDAs (Deloitte, 2019)

Convenience refers to the ability to use something without difficulty and FDAs can provide comfort by easily providing options to compare food prices from different restaurants (Ray et al., 2019). The studies on OFDs and FDAs are still in early stages. FDAs are becoming increasingly popular and are gradually becoming an instrument for survival of restaurant owners, especially during the restrictions caused by Covid-19. This popularity is also fuelled by customers' increasing willingness to consume ready-made food at their doorstep.
FDAs not only provide a store window, they are extremely convenient for end users, that can buy their food with a couple of clicks and they provide the delivery logistics for restaurants. By leveraging and expanding their wide customer base, through large-scale marketing, third-party

platforms, allows traditional restaurants to reach customers that otherwise would not have ordered from them at all (Deloitte, 2019).
The downside is the high commission fees that FDAs charge to restaurants and they are trying to find other channels to increase their profits (Ovide, 2020) and the lack of control of the delivery service. Moreover, since this service is provided by an app that is installed in the smartphone, these platforms are very good at retaining their customers (Hirschberg et al., 2016), as it shown in Figure 4. that presents the customer retention rates FDAs in some reference countries.
This means bad news for virtual restaurants. It is hard to divert sales from FDAs to direct sales and, thus, avoid the high commission fees. A higher retention rate also means that competition is for new users and not restaurants, with low incentive to lower commission fees.
Although virtual restaurants have little control over conversions in FDA platforms, the things they control must be executed flawlessly. The food images must be appetizing. The product copy should be clear and inciting. Menu combos (combination of main dish with side orders) should also be clear.

FDA customer retention

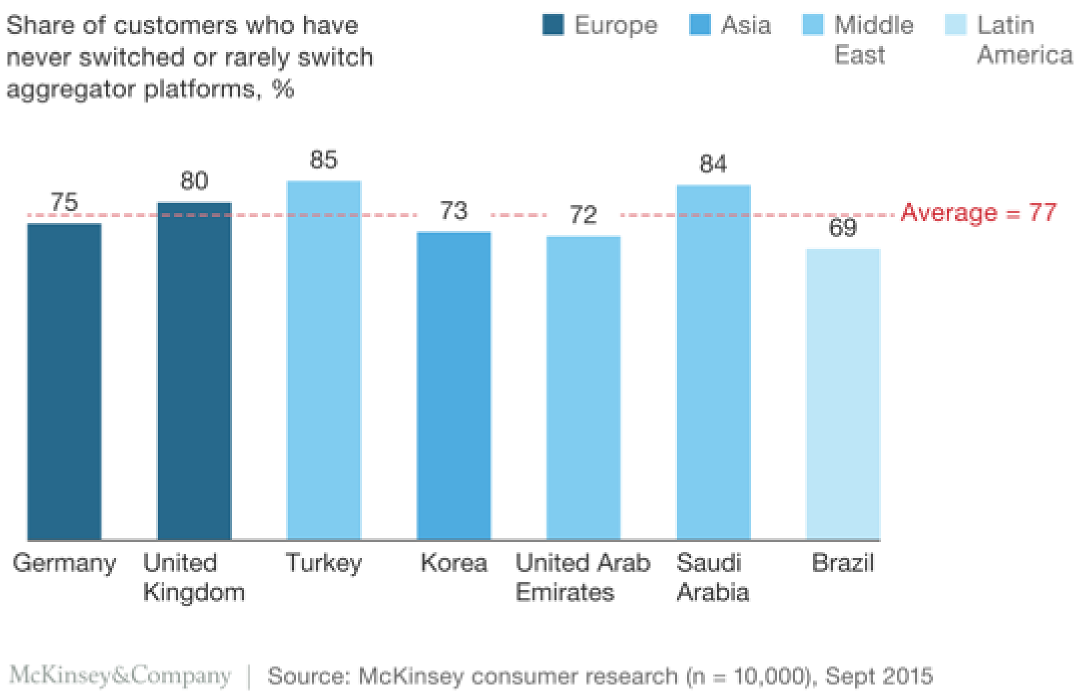


Figure 4.4 – Customer retention rate by FDAs (McKinsey Consumer research, 2015)

Restaurant website

Online food ordering connects the eater/customer and restaurants through web or mobile applications.
Having a website is, as seen in Figure 4.4, extremely important, since the first channel for brand research by consumers is through search engines. A website works as a store window as well as part of the sales funnel, converting visitors into customers. Moreover, it is also a way of brand positioning and building trust with their customers. Previous studies have found that website design quality is one main factor affecting consumers' initial online purchase behaviour (Zhou et al., 2009). The results of the study “The Relative Importance of Website Design Quality and Service Quality in Determining Consumers’ Online Repurchase Behavior” show that website design quality has significantly stronger effects on consumers' trust and satisfaction (Zhou et al., 2009).

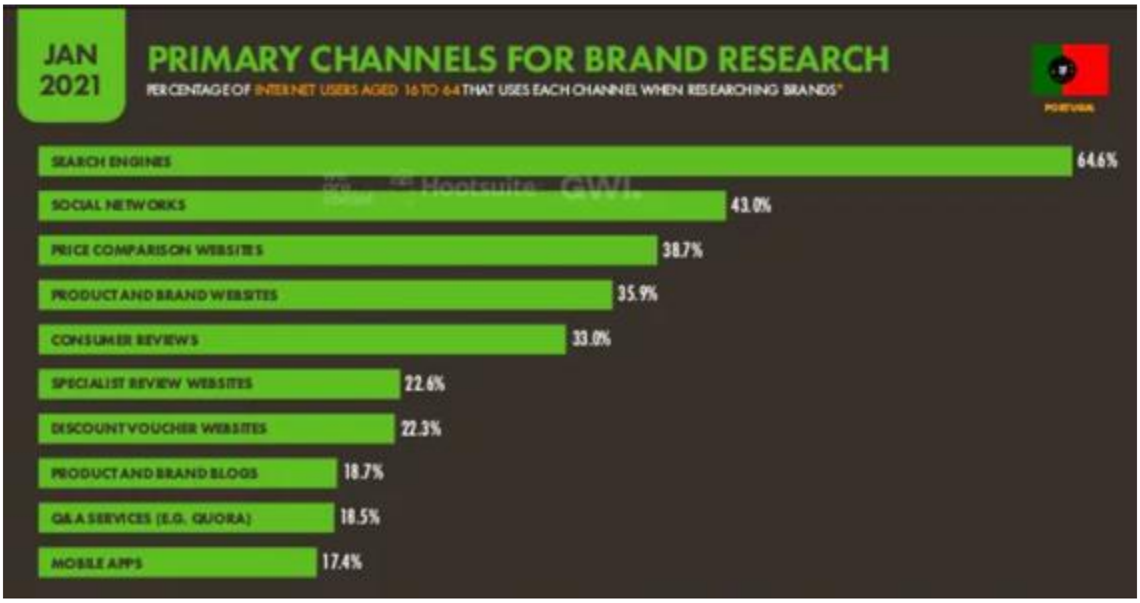


Figure 4.4 - How people search for brands | Source GWI (Q2 2021)

It seems ironic, but without a physical location, a website is part of the physical evidence for the brand. In today's world, the opposite might occur: if a company does not have a website or social media with recent content can be perceived as closed or never existed.
In this channel a quick application of the web marketing mix for a virtual restaurant can be used like these:

- Scope – being a virtual restaurant, the entire strategy is focused on driving traffic for the website to convert users into customers: e-commerce sales.
- Site – The website should be more than a store window. It must be part of the sales funnel and be responsive.
- Synergy – The website/app needs to be integrated with kitchen printers, business POS and invoice software, chefs and cooks.
- System – Choosing a CMS to help manage content, constant updates and backoffice of all the software and plugins.

The website is the headquarters of the digital and offline Marketing strategies. Not only showcases products but, most important, it is where it generates sales.
The website can aggregate most of the brand content and where the final stages of the sales funnel happen, where traffic from social media, search engines and adds will land, to convert customers into sales.
The website must have a structure that, independently of the landing page, will incentivize traffic flowing towards a sale, and ordering and paying must have the same UX as a FDA as possible.

If the sale is done through an FDA the virtual restaurant will not retain any data. Sales through the website provide a better Customer Relationship Management (CRM), if customers allow the restaurant to use their information.
There are many website templates and applications that are customized to cater to the needs of eaters and provide them a better service. Today, it is quite easy and cheap for a virtual restaurant to provide a OFD service through a website or a customized web-based app.
Although it is not fairly costly to have, it is harder to maintain, in terms of content, design and integration with other software, such as POS.

There are other Sales Channels that can be included, considering the idiosyncrasies of each business. Since small virtual restaurants operate with minimum staff, the below indicated channels, although can be very convenient for the consumer/end user, they can consume resources and time.

Social Media

A social media marketing funnel can be part of the initial path that your customers move through at each point of the user journey (S-Lawler, 2019). It helps the brand to be discovered and create intent. Social media does help restaurants to attract more buyers in the market (Borgohain, 2019). However, social media food delivery option is to link the brand account to a FDA. This way, all marketing investment in social media content and ads are contributing to FDAs traffic and all orders will have a high commission fee on top. According to the survey done for this thesis, only 2% of the respondents said that it was the first preferred way to buy OFD, and another 4% said it was their second preferred way (Figure 5.4). These are not high numbers and social media as a commercial channel does look that “appetizing”. But, social media can perform as a store window that drives customers into the virtual restaurant website, restaurant app or a direct phone call.

For many, traditional restaurants and virtual restaurants that want to operate in the OFD market, social media is the best, if not the only, option to “steal” some traffic from FDAs and avoid the high commission fees. But this process also comes with a cost: the food delivery logistics process must be done by the restaurant. Also, virtual restaurants must bear in mind that social media ability to sell food delivery is not great. The selling process through social media either is too “manual” and time consuming or goes directly to an FDA that is expensive. The best way to do it is, instead of directing traffic to a FDA, is to divert it to the virtual restaurant website or app.

In Portugal, Figure 4.5 reveals the number of social media users increased by 800k (+11%) between 2020 and 2021, with 7.80 million users in January 2021, equivalent to 76.6% of the total population. (Kemp, 2021). Interestingly, nearly 97% of users go on social media through their smartphone and 61.6% use Facebook only through their mobile device (Kemp, 2021).

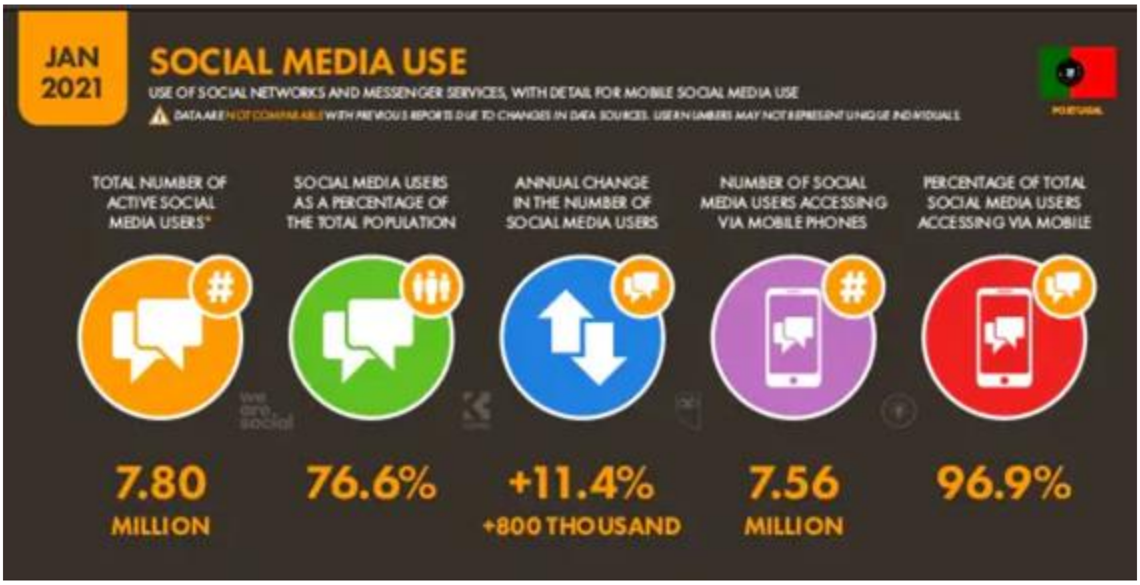


Figure 4.5 - Social Media in Portugal (Kemp, 2021)

Telephone calls

If 17% of the respondents (Figure 5.4) said that making a phone call was their preferred way and 26% said it was their second preferred way for ordering food delivery, why isn’t the “good old” telephone considered as a main sales channel for a small virtual restaurant?

The answer is efficiency. A small virtual restaurant operates with a minimum staff that usually only cooks. Answering commercial calls in the middle of service hours disrupts the operation and consumes valuable time.
Also, the trend in the food industry is ordering through apps. Even in physical stores, like McDonald's, people are encouraged to buy through a big display placed inside stores. Similarly, like in Starbucks, customers use mobile apps to buy through their smartphone. Chief Financial Officer Scott Maw, from Starbucks, launched mobile pay through its app in 2015 and in 2016 accounted for about 5% of sales, jumping into 20% of transactions at peak times at several hundred of its urban stores (Bomkamp, 2016). According to a New York Times article, even when the restaurant could afford to hire someone to answer the phone, it still did not make sense for the efficiency of the business (Peterson, 2022). Moreover, among fast-food restaurants, the frequency of customer visits increases by 6% and average spending per visit rises by about 20% when technology is used to place an order (Deloitte, 2016).
A small virtual restaurant can use telephone calls and messaging apps as a main sales channel, but, first, it must consider all implications and costs for this channel. Besides the disadvantages already pointed up, receiving telephone calls also has some advantages. A small virtual restaurant can engage in conversations with customers, create better physical evidence for the brand and giving a human voice to it. For some customers it is still very convenient to just go on my phone and order food to be delivered (Peterson, 2022).
Using telephone calls as a sales channel for a small virtual restaurant represents a trade-off that each business must analyse and consider the pros and cons before making a decision.

Messaging apps

The usage of messaging apps as a commercial sales channel has a similar trade-off like telephone calls. Since it is difficult to integrate messaging apps with POS systems and kitchen ordering systems, exchanging messages with customers can take up valuable employee time. Again, both pros and cons of this this option can be considered by small virtual restaurants.

Brand smartphone app

Mobile applications make businesses more profitable and have made user access to several features easy, which enhance their experience and make them eat more (Shastri, 2019). Although there are many advantages like increasing buying frequency and customer loyalty (Cha et. al, 2020), for a small virtual restaurant, the cost of building and maintaining a mobile app can be financially prohibitive. A small virtual restaurant chooses to operate in a dark kitchen to have little initial investments. More, the cost of building and maintaining mobile apps are only justified with high sales volume to have returns on the investment.
There are cheap alternatives like web-based applications that can be easily integrated in the brands website. These solutions usually charge a low commission sales rate and little or no initial/fixed cost. Unfortunately, these don't come with the same loyalty and buying frequency rates as a dedicated mobile application.

4.2.5 Content

Content marketing seeks to develop content that better engages targeted users and drives the desired goals of the marketer from the campaigns they implement. (Lee et al., 2013). If the biggest challenge of a virtual restaurant is to create an emotional bond with their customers, content marketing is, then, the best way to do it.

> *Creating content is the best and cheapest strategy to achieve the marketing goal.*
>
> (Kingsnorth, 2019)

The type of content marketing used is determined according to the information obtained by the target analysis (Patrutiu Baltes, 2015).
First, if any company wants to be present at any digital channel, such as social media, websites, and so on, it must produce digital marketing content. Moreover, a virtual restaurant, just by its name alone suggests that it mainly operates in the digital universe.
Second, and very important, digital content will provide a wealth of new value for the business and build trust around the brand. Although, content creation is not traditionally considered to be a sales technique, it ties in very smoothly with a virtual restaurant Marketing Strategy.
The main goal of the digital content marketing strategy is to shift the sales strategy from a "find targets and push sales pitch" to pulling targets that seek the virtual restaurant content, and converting them into customers.
Third, good content will provide followers in several platforms. With followers and a trusted brand recognition, it will be easier to gather partnerships within the Food Industry players that would like to have visibility and be associated with that trust. This can mean another stream of revenue or equipment and ingredient discounts.
Fourth and least, but the most important, good content makes it easier to acquire better and profitable customers and retain them. This shifts from a “discount/low price” strategy to a “create value” market positioning.
Summarizing, a good Content Marketing Strategy will give a virtual restaurant:

- Better and more Public Relations (PR) - More news in various media and specialty bloggers/influencers
- Brand trust and build relationships based on trust
- Better partnerships
- Attract new viewers and other possible targets
- More digital traffic
- Increase brand awareness
- Attract new leads and generate more sales
- Solving problems related to low audience
- Creating a need for a specific product
- Develop customer loyalty
- Testing a new product idea / business (Ionesco 2015, cited by (Rowley, 2008))

To better understand what content should a virtual restaurant produce, first it must step into the shoes of a customer: What kind of content do they seek, like, share, in sum: engage? A company must know its audience, and give them what they want (Patel, 2019).
In any internet search for any content, we will get millions of possible answers. What kind of content should a virtual restaurant do, then?
Simplifying, in the words of Manoj Bhargava[2]:

> *“There are two main types of content. If it’s not informative/useful, it better be entertaining.”*
>
> Bhargava, Manoj, Billions in Change[3]

Getting deeper into this dual content strategy main categories there are sub-categories, that a virtual restaurant digital content marketing strategy can choose.

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[2] **Manoj Bhargava** (born 1953) is an American billionaire businessman and philanthropist, founder and CEO of Innovations Ventures, the company known for producing the 5-hour Energy drink. By 2012 the brand had grown to do an estimated $1 billion in sales. In 2015, Bhargava pledged 99% of his net worth to improving the well-being of the world's less fortunate.
[3] https://billionsinchange.com/

In the “useful” category a virtual restaurant can produce/share content like recipes, cooking tips, new cooking technology, food science, and so on.
Regarding the entertaining category, the content is supposed to be fun, relaxed and informal content like memes, food porn images, UGC (User Generated Content), and so on. (Ashley & Tuten, 2015).
It's not financially feasible to produce all kind and type of content, in several formats, for all market targets and segments, in all marketing channels. Therefore, the brand must focus on the virtual restaurant main target: customers, and understand the purpose of creating digital content. The first Dynamic C is Customers. So, by the content creation stage the marketing team already knows who the company target should be, their likes and preferences. It also should know where their potential customers live, digitally. But there’s a catch. To achieve results, Instagram content is different than LinkedIn for example. Pinterest attracts more middle-aged women and Twitch more young men. But the same person can be in different platforms, using Instagram and LinkedIn at the same time, for example. However, posts with the same content in both platforms will create different reactions to the same person, and one of them can be negative.

User-generated content (UGC)

User-generated content (UGC) is any content (text, videos, images, reviews, etc.), created by people, rather than brands. Brands can share UGC on their own social media accounts, website, and other marketing channels. A recent research paper about User Generated Content for exploring factors affecting intention to use travel and food delivery services, from the International Journal of Hospitality Management, revealed that price benefits and trust-in-service are major predictors of customer’s usage intention in OFD contexts (Ray & Bala, 2021). The impact of consumer-to-consumer communications has been greatly magnified in the marketplace. (Mangold & Faulds, 2009) and this consumer-to-consumer conversations are a very important factor to drive trust into a brand.
Therefore, creating incentives for UGC can be beneficial and cost effective. First, because it's free content. Second, because it's a way to engage with followers. Third, it promotes authenticity and consumers are 2.4 times more likely to view UGC as authentic, compared to content created by brands (Stackla Survey, 2019). That offers any company an important credibility boost.
UGC is different from influencers. It's real people that like the brand they follow and create some genuine content about their professional or personal life with it. Sharing UGC is "showing off" the love for brand followers have and saying "this genuine person trust us, you should do too!".
There are several tactics to promote UGC like contents or other kind of promotions. The best way is to have interesting and “sexy” products, engage with customers with good content and let it flow naturally. Engaging also means paying attention what customers post and speak.

Content or promotion

In the Dynamic Cs model, Promotion is included in the Content item. There are several ways to promote our products. The emergence of Internet-based social media has made it possible for one person or company to communicate with hundreds or even thousands of other people about products and the companies that provide them. (Mangold & Faulds, 2009)
Even if a company decides to create a TV ad, they show content. But before social media and smartphones, a TV ad could last years. Now, social media content lasts hours, if not less.
Content can be several things. A hard sell tactic with google ads, landing pages with the goal to trade e-books (or other useful content) for email contacts or a simple video showing how the product is done in Instagram IGTV. Sometimes it can cost a lot of money and time to produce, sometimes a simple food porn post can reach thousands of people.
Content is the main part of an integrated marketing communication strategy that attempts to coordinate and control the various elements of the promotional mix—advertising, personal

selling, public relations, publicity, direct marketing, and sales promotion (Mangold & Faulds, 2009).

4.2.6 Dynamic C's loop

This model is called Dynamic Cs because it loops constantly, and it's never done or over.
If all goes well, after sales, companies must try to retain customers. Keeping customers is important, since high retention is correlated with high profitability and can be a good metric. But loyalty, looked as simply just one measure must be approached with caution. (Douglas Henry, 2000). Loyalty should not be obtained through better prices and lowering them to stay ahead of the competition. Good loyalty comes through product innovation that keeps bringing customer value.
Customer retention and loyalty is another big reason to divert traffic from FDAs to direct sale through the website. If allowed by the user on collection, customer data can be used later to push information of future marketing campaigns for free.
The world is changing at an enormous pace. Not just technology, but social habits. Nobody was expecting a new big social media platform that could take on Instagram or Facebook, and yet TikTok stormed amongst young people. Sales channels change overnight.
Launching a really innovative product that has some degree of success, also means competition will soon have something similar to offer. A virtual restaurant must keep a constant eye on the competition. Inversely, this can also be a marketing strategy to launch similar successful products that the competition has recently placed on the market.
Therefore, the virtual restaurant marketing is never over and never done. After the initial marketing plan, we need to retain our **C**ustomers, keep an eye on new or changing **C**ompetition, adapt to new sales **C**hannels and always be creating **C**ontent. It is like a Nascar race track where marketing is driving in circles, as fast as possible or, at least, faster than the other "cars".

5 MARKET RESEARCH FOR VIRTUAL RESTAURANTS

As stated, one of the goals of this dissertation is to create a strategic and marketing analysis and positioning for a new virtual restaurant with two brands. To help create a more realistic and precise marketing plan, a quantitative market research was conducted.

5.1 Method and market research

A good market research starts by formulating a problem (Mooi & Sarstedt, 2011). The method used for this research was based on the book Concise Guide to Market Research (Figure 5.1). Addressing the first two items of this method:

1. The problem - find a market niche/segment in the food delivery industry in Lisbon for the virtual restaurant marketing plans Case Studies.
2. Research design - the research could provide a deeper knowledge about customer preferences, regarding their age and sex, so that we could create a product, brand and service customized to market segment/niche.

The rest of the items need a more complex explanation, described below on the following sub-tittles and chapters.

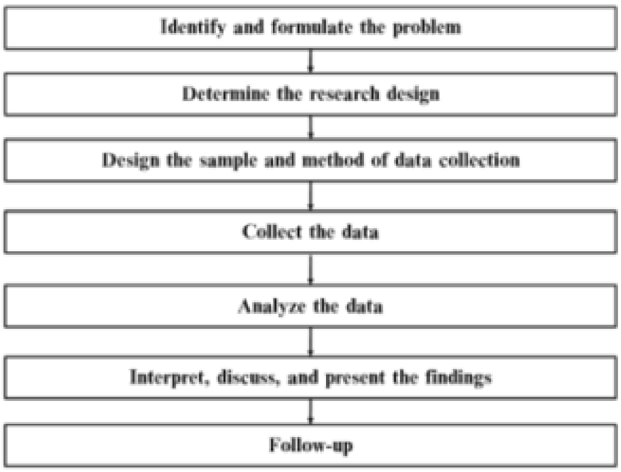

Figure 5.1 - The market research process (Mooi and Sarstedt, 2011)

5.2 Data Collection Method

This market research was done through a Google Questionnaire, sent to thousands of people using email lists, social media (Facebook Groups and Linkedin groups). It was posted in the most different Facebook and Linkedin Groups like Real Estate, Entrepreneurs, Volleyball, Lisbon experiences, Yoga and breathing, Urban farmers, Lisbon friends, Film production groups, Padel and tennis, Traveling, Teachers, Surfers, Motorbikes, Cars, Employment, etc. People could only answer the questionnaire one time (filtering by IP, Google account). The questionnaire was available for 3 months from late September of 2020 to December of 2020. This collection resulted in 438 responses, that after filtering for food delivery users and matrix validation, ended up in 426 responses.

The questionnaire was divided in two major segments. First, understand customer preferences regarding preferred types of take away and food delivery. Second, understand customer preferences regarding food categories, promotions, FDA platform aggregators and buying decisions. Apart from this, there were four demographic questions: age, gender, where they live and family size. As a "bonus" question, the survey asked about the importance of sustainable and eco-friendly packaging. This question aimed to better understand consumer trends regarding sustainability and creation of a more suitable packaging offer, according to the target segment, when designing the marketing plans for the virtual restaurant Case Studies.

Research limitations and problems

Although it allowed obtaining information on customer preferences, the survey performed for the present work has two main problems:

1. Pizza was not included as a choice for preferred food order. Since the initial plan was never to open a "Virtual Pizzeria", I completely forgot to include pizza as an option for "Preferred food type".
I managed to contact Uber Eats, Glovo and Bolt. While the last 2 said that pizza didn't have a big expression in their orders, Uber Eats told me that they could not provide me with data, but they were kind enough to state that Pizza isn't in their Top 5 most requested items. This information coincides with the TimeOut article (Garcia, 2020).
Although I believe Pizza is in the Top 3 most requested products in the Food Delivery and Take away market, big pizza chains have their own distribution and order channels, with a low presence in FDAs.

2. The demographic location question should have been more precise. Instead of seting only 3 big regions - Lisbon Metropolitan Area, Porto Metropolitan Area and rest of the world - a narrowed location by municipality should had been proposed - like Oeiras, Cascais, Sintra, Almada, Loures, etc.

Also, the question about "preferred FDAs" lost its significance because, since the time the questionnaire was available for answering and the moment of analysing data, there were more players entering the market and Uber Eats lost market share.

5.3 Data Analysis

Data analysis was made by summarizing and organizing characteristics of the collected data using descriptive statistics
In terms of general results respondents stated they clearly preferred a food delivery option vs take away (Figure 5.2) and they rather consume at home than at the office (Figure 5.3) and. In course, this last result must take into account the period of this survey, during the middle of the pandemic with most people working from home.

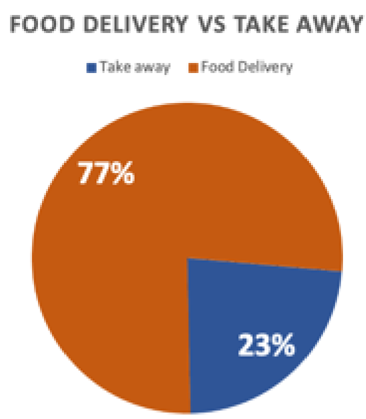

Figure 5.2 - Preferred location to consume OFD | OFD survey (2020)

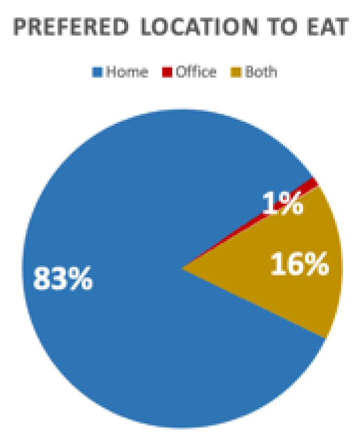

Figure 5.3 – Preferred type of OFD service | OFD survey (2020)

The next results, (Figure 5.4), are coherent with other research (Panse et al., 2019) with the first and second preferred way to buy food using a FDA represent 73% combined. Social media represents only 6% combined and the "traditional" phone call order still represents to 43% of the people one of their top preferred ways to order food.

Figure 5.4 – Preferred ways to buy OFD | OFD survey (2020)

Figure 5.5 reveals the maturity of the Portuguese market. In this survey, 11% of the respondents that order food delivery said that order 2 to 4 times per week. But if we travel back in time to 2016, in the USA, already at the time 31% of people that ordered food delivery said they use these services at least twice a week (The Online Foodservice Consumer US, 2016).

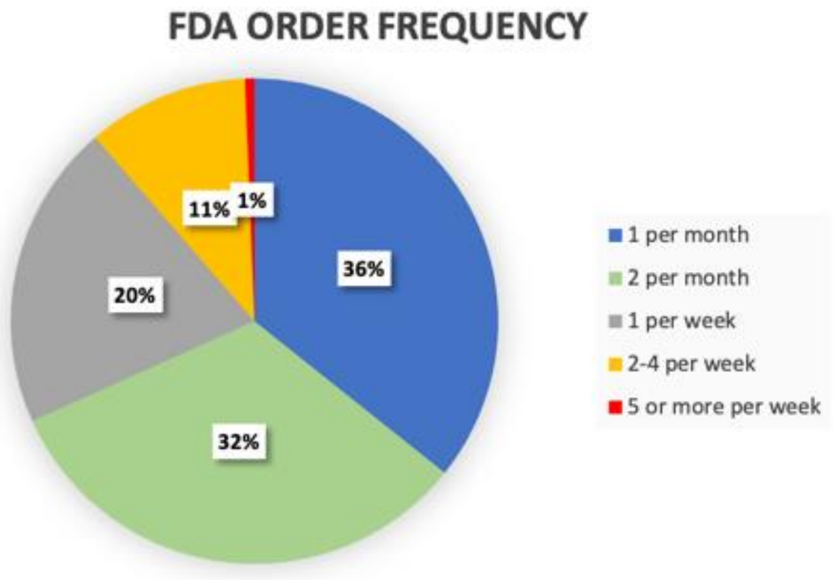

Figure 5.5 – Number of orders in OFD | OFD survey (2020)

In terms of buying decision, Figure 5.6 shows that 27% of the people stated that price and promotions is a major factor to influence their choice of food, contrasting with Eurobarometer study where 70% of Portuguese stated that price was their number one concern (Special, 2020). However, the Eurobarometer question was about all of the food industry, including buying goods at supermarkets and not restaurants or food delivery.

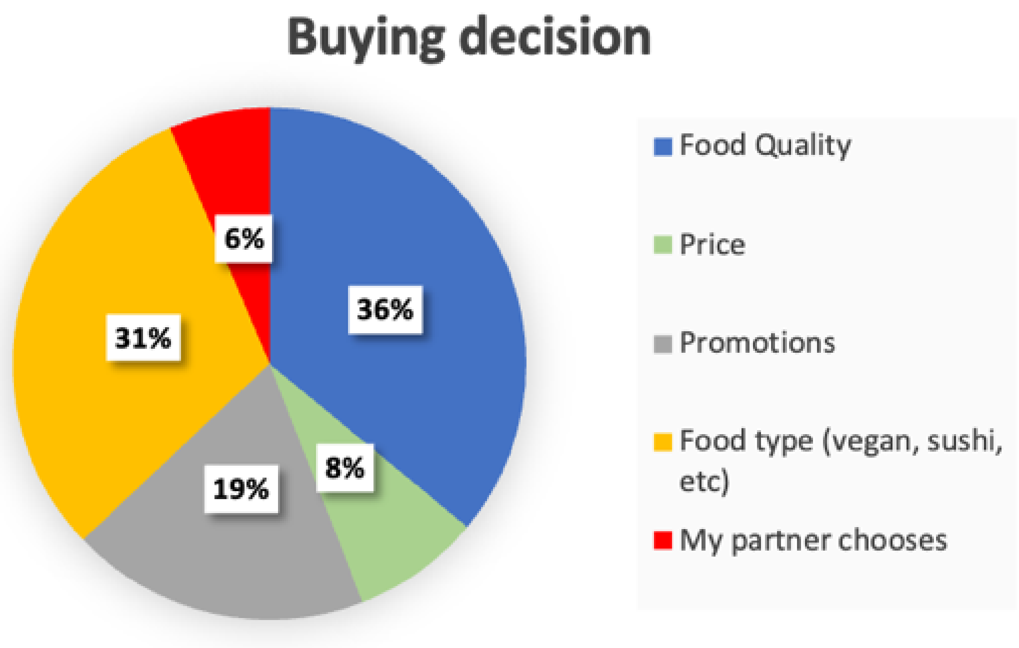

Figure 5.6 – Reasons to choose a restaurant in OFD | OFD survey (2020)

Another important question was about the type of food people bought more frequently via OFD as seen in Figure 5.7. For example, I was not expecting that sandwiches would have such a low percentage. In the other hand, sushi is the preferred food request in OFD[4] with almost 60% of the respondents stating that they order sushi online. Another unexpected result was the "homemade food" category with a bit more than one third of respondents saying they order it regularly, more than MacDonald's.

[4] Again, this survey didn't had Pizza has an option, therefore, these results may lack information.

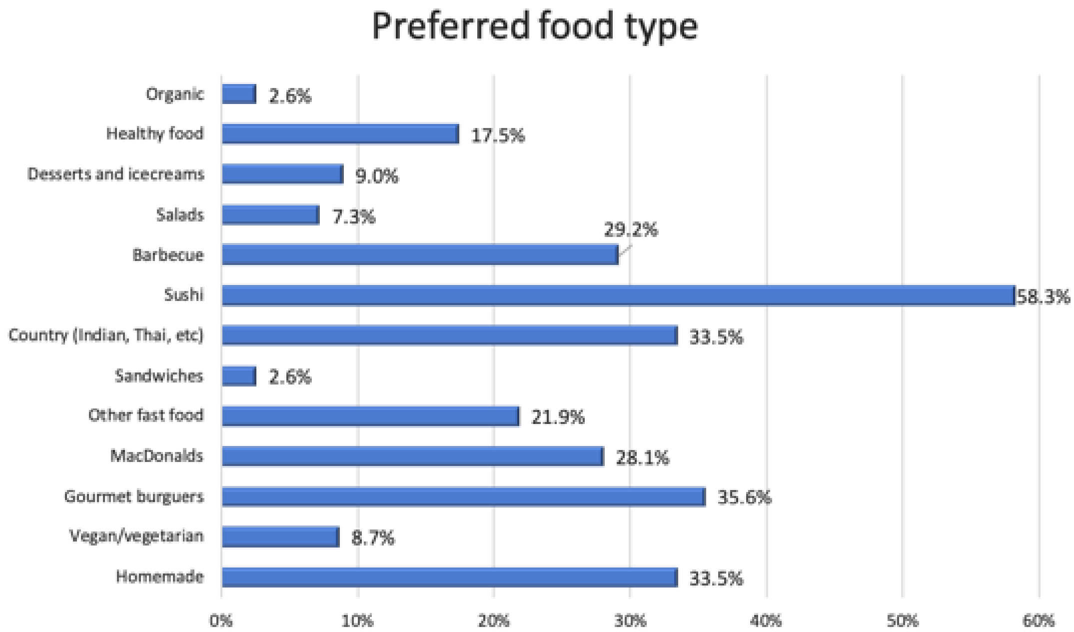

Figure 5.7 – Preferred food type | OFD survey (2020)

The demographic questions, in Figure 5.8, had the purpose to, first, add another layer of validation and, second, to perform some cross-sectional analysis. The distribution between genders is close to the overall Portuguese distribution - 52% female and 48% male (Census, 2021). In terms of age, the main respondents are between 26 and 50.

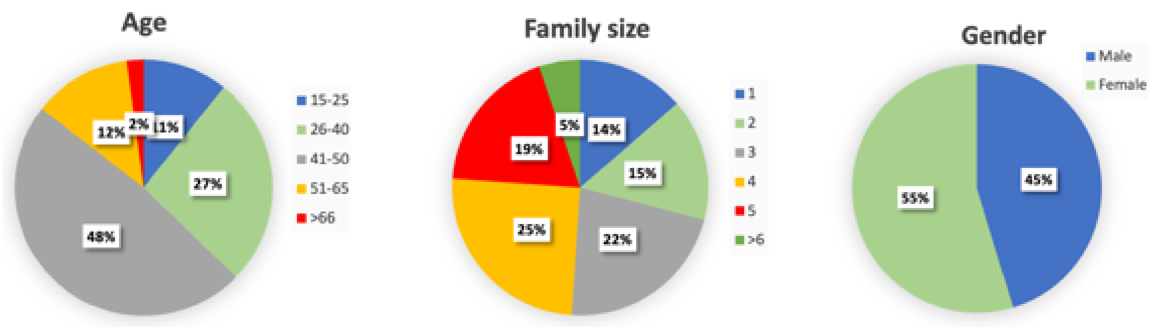

Figure 5.8 - Demographics of the survey respondents | OFD survey (2020)

To better understand customer preferences, I crossed some data from the survey in order to obtain a better vision of preferences per age groups and factors that can influence buying decision. To find out the number of orders per age group and per food type was also intended.

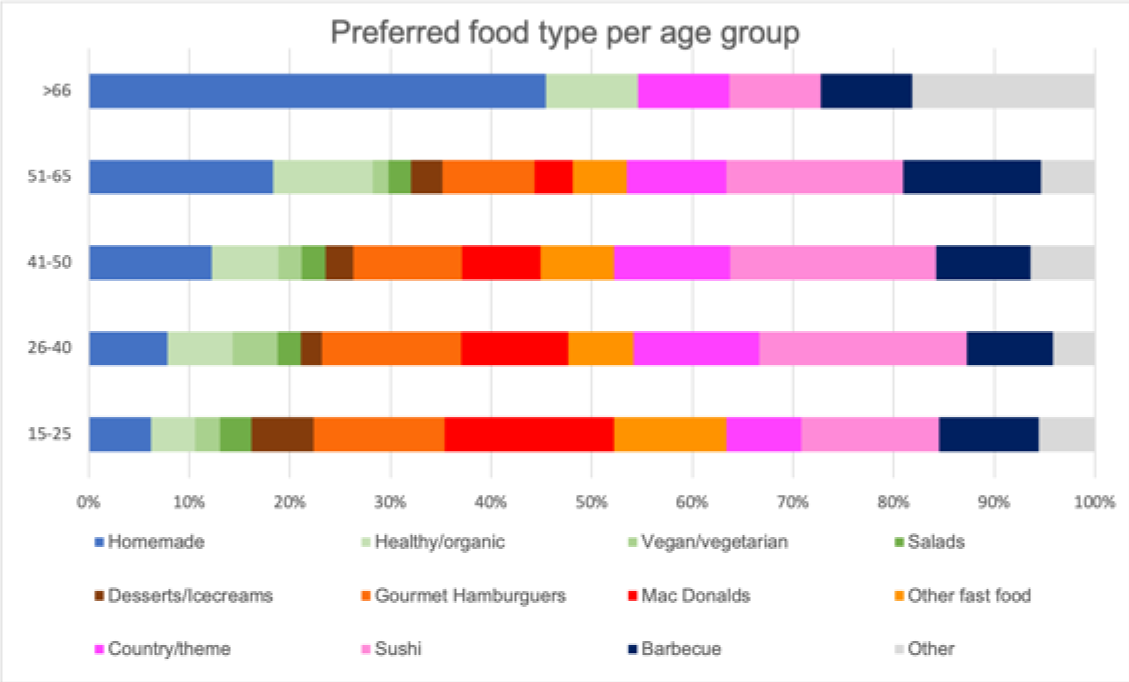

Figure 5.9 - Food type preferences per age | OFD survey (2020)

Figure 5.9 shows the preferred food types, per age group. The older the age group is, the bigger preference towards homemade. Vegan has a small percentage similar to all age groups, except the older one, which is non-existent. In terms of fast food, McDonald's, Gourmet and Other fast food, decrease with people's age. Sushi is dominant in the middle-aged groups, but already has a significant result in the younger and older generations.

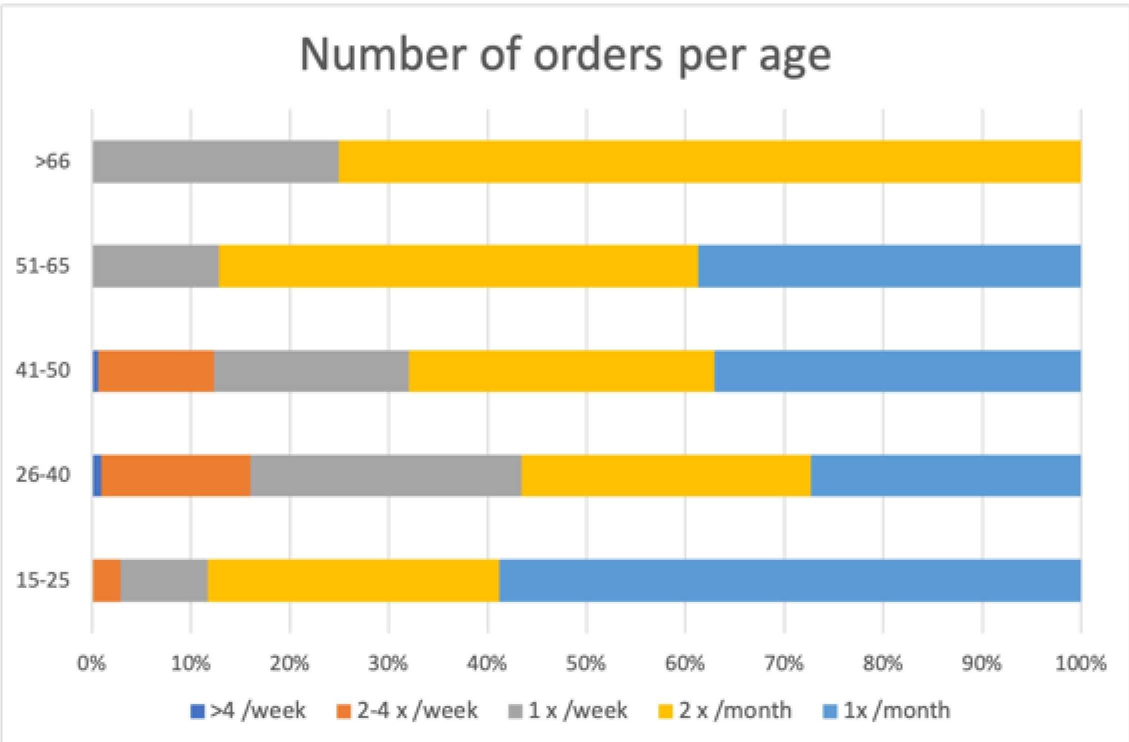

Figure 5.10 - Orders frequency per age | OFD survey (2020)

One thing that is crucial for a virtual restaurant is the frequency of orders a person makes. A market target that only orders food delivery twice a year, might not be so good after all. Figure 5.10 shows that the heavy users of OFD are the middle-aged groups between 26 to 50.
Figure 5.11 is an analysis of the influence price and promotions have per age group. Again, the older the age group, the less important price is.
Figure 5.12 analysis goal was to try to find if there was a strong link between people that usually choose a determined food type with price sensibility. Only 30% of the people that order sushi stated that are influenced by price or promotions, contrasting with 41% of people that prefer fast food (Other fast food and McDonald's) and 38% of Gourmet Burgers. People that value healthy and vegan meals is the group least sensitive to price, placing their health and lifestyle choices first.

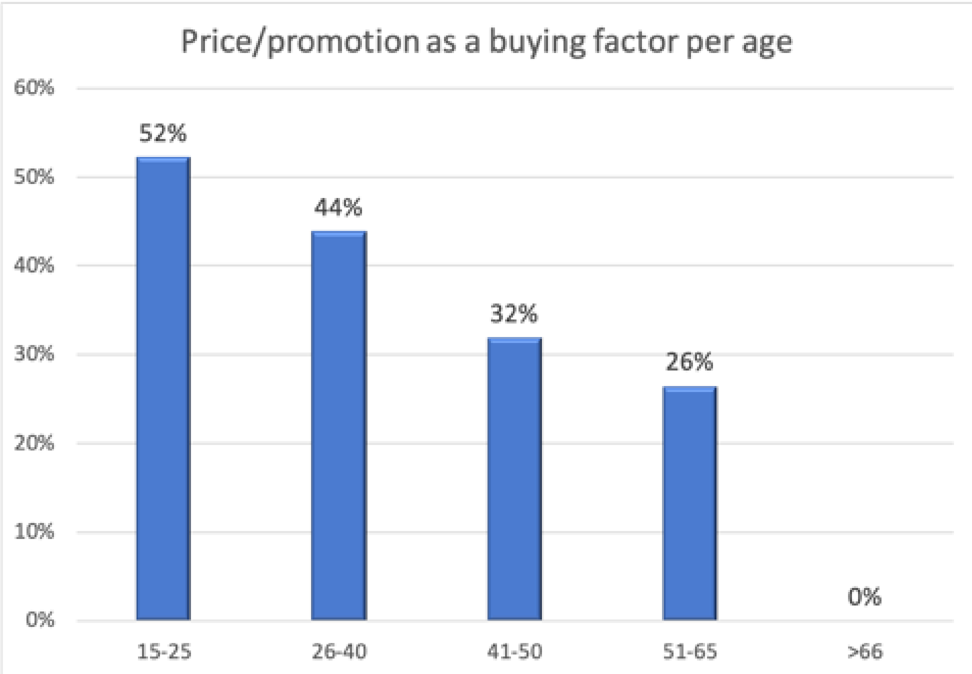

Figure 5.11 – Price as buying factor per age group| OFD survey (2020)

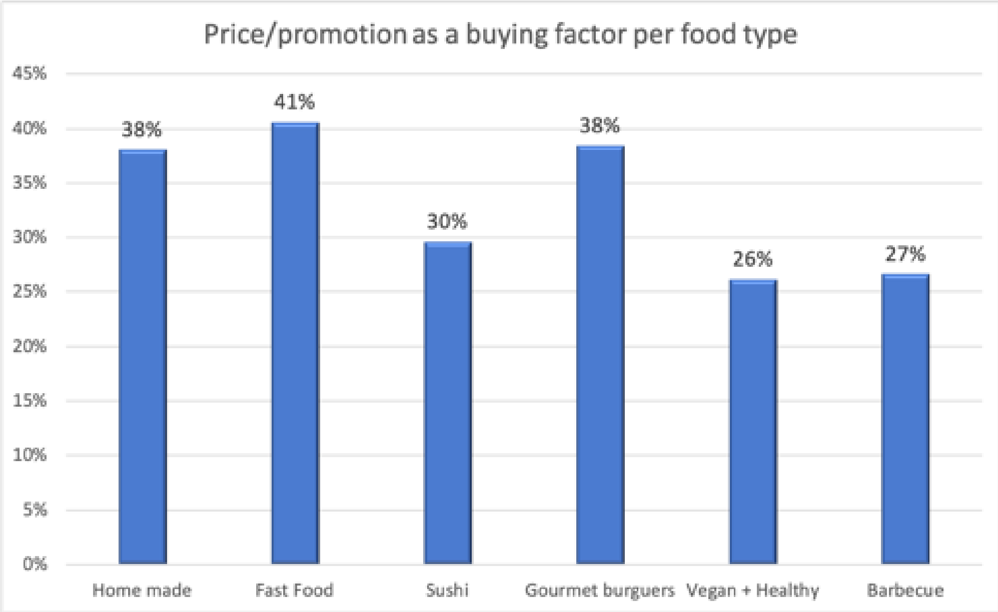

Figure 5.12 – Buying factor per food type | OFD survey (2020)

Figure 5.13 is a cross analysis between preferred food type and gender. The most interesting food types are sushi, mostly preferred by women and barbecue and country or ethnic food mostly preferred by men. Another interesting difference is that men tend to order more MacDonald's and women more Other fast food.

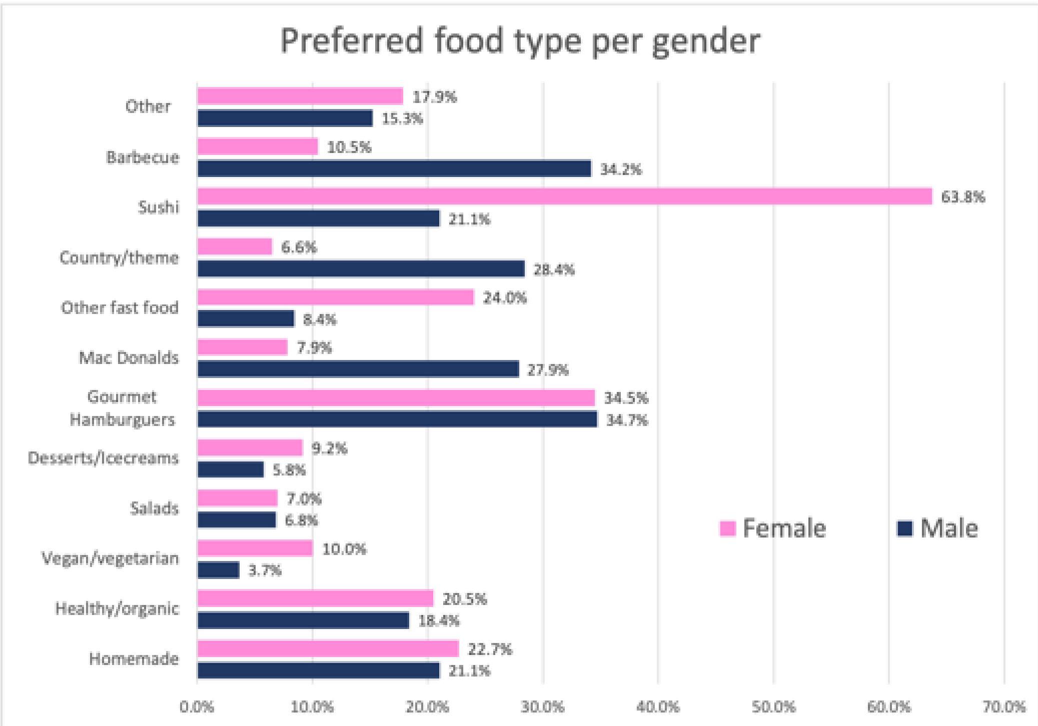

Figure 5.13 - Preferred food type per gender | OFD survey (2020)

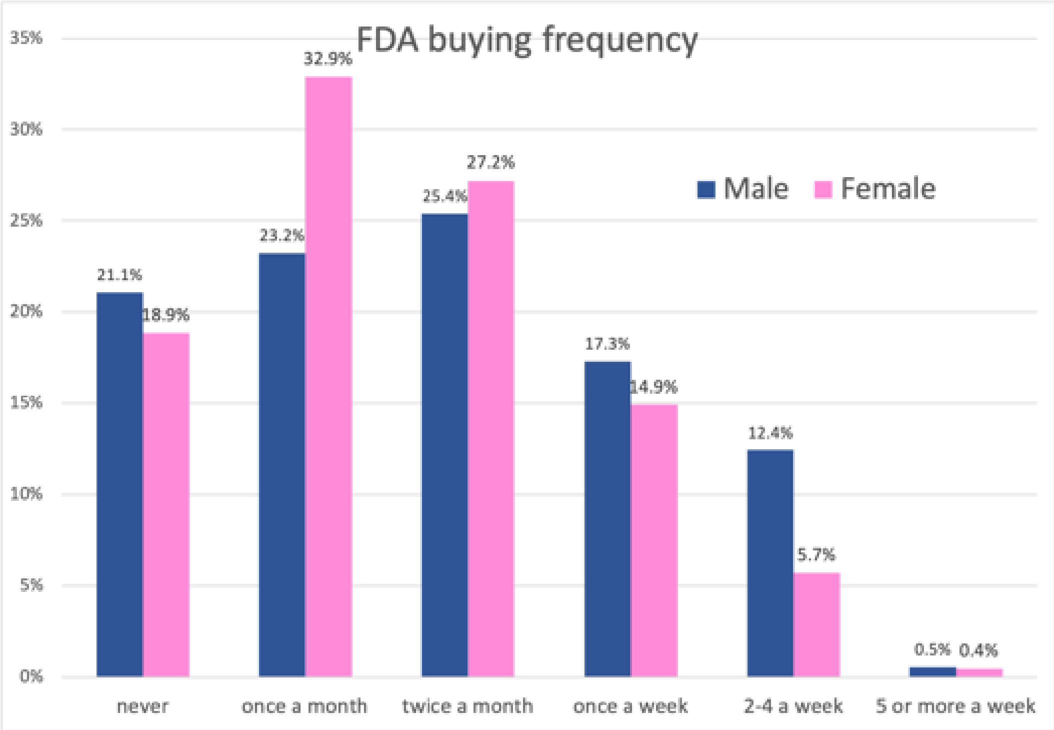

Figure 5.14 - Buying frequency on platforms per gender | OFD survey (2020)

Continue cross-analyzing data with gender, men buy more frequently than women as shown in Figure 5.14. Figure 5.15 shows price is important as a buying decision for 41% both male and female. The only small difference is that men are more susceptible to price (13% vs. 10%) and women to promotions (31% vs. 28%). Therefore, the main conclusion is that promotions attract more customers than better price.

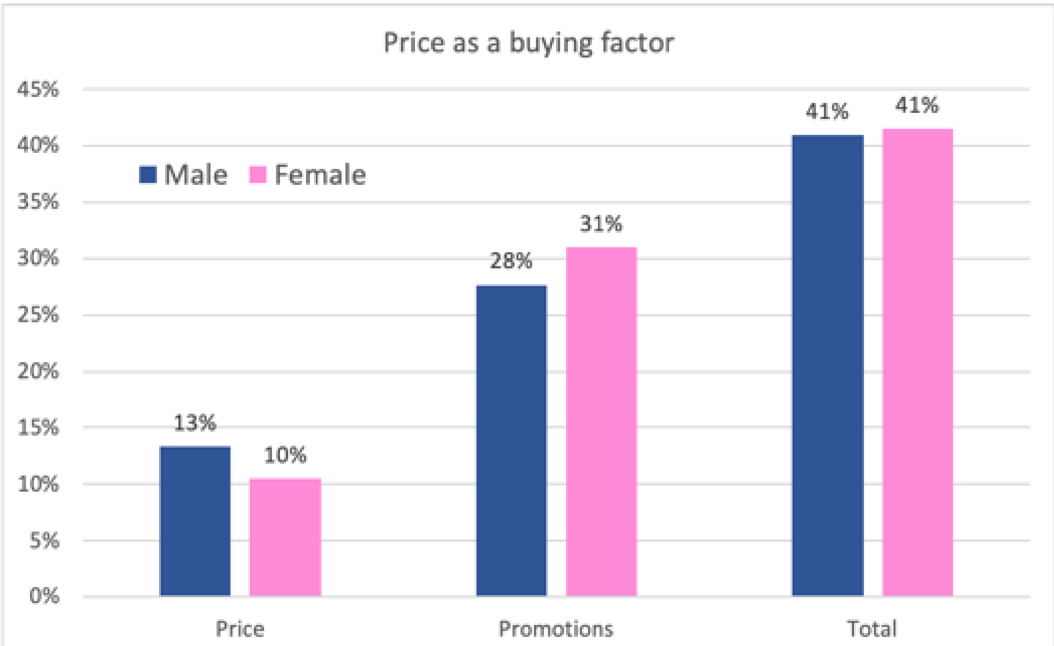

Figure 5.15 - Price as a buying decision | OFD survey (2020)

To complement this survey, Figure 5.16 is a graphic from Eurobarometer (2020) comparing the EU average with Portuguese data regarding preferences when buying food.
This graphic can be not only a good validation for the survey done for this thesis, but also a small complement. It must be taken into account that the questions made are for buying food generally and not Food Delivery. It shows that price and cost are a big concern for Portuguese, compared to other EU countries. Another item to bear in mind when creating the marketing plan for virtual restaurants is that taste is significantly more important to Portuguese, therefore, product quality must be dealt with caution.

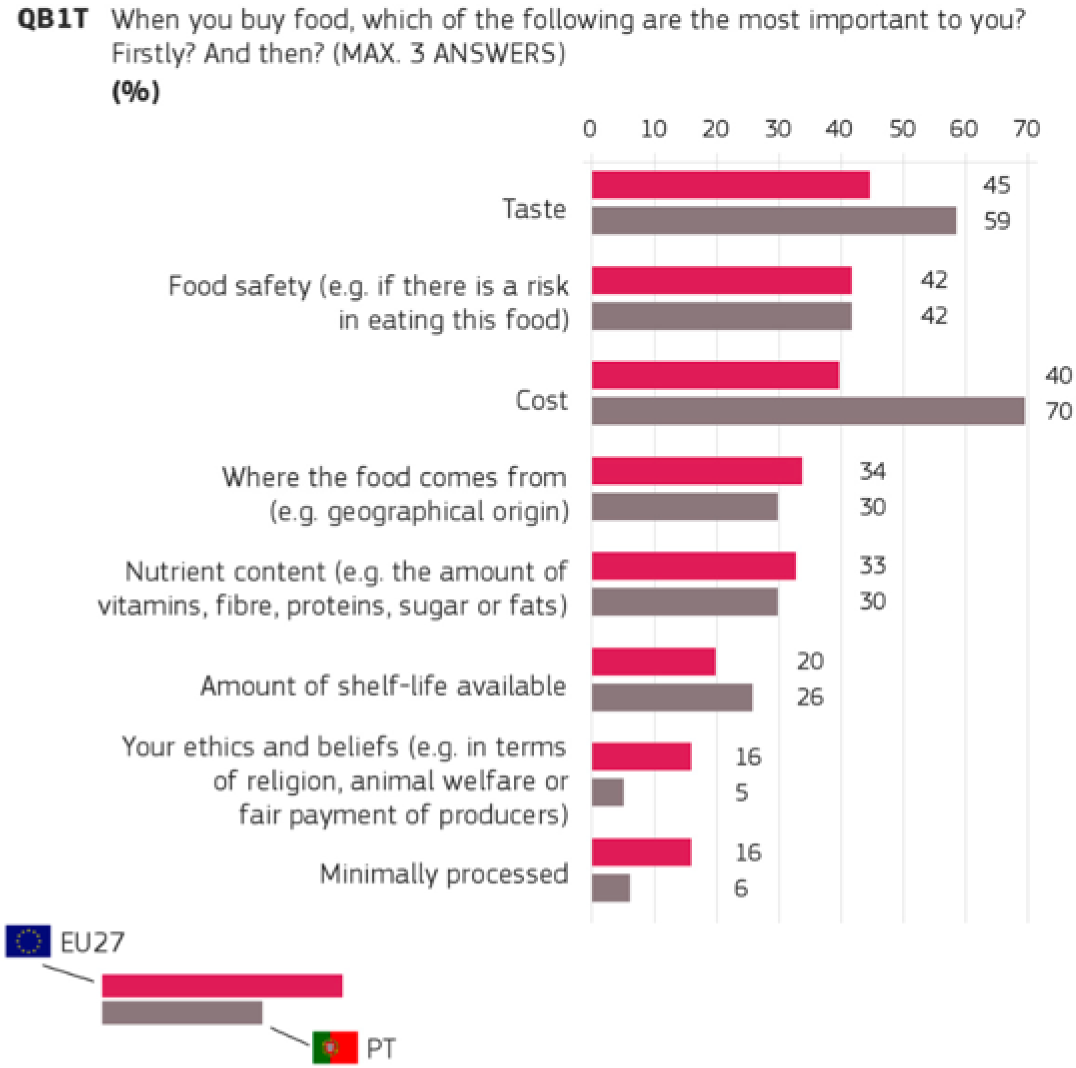

Figure 5.16 - Eurobarometer 505 (Special, 2020)

6 CASE STUDY 1

One of the goals of this dissertation is to create a strategic and marketing analysis and positioning for a new virtual restaurant. Therefore, Chapter 7 and 8 are Case Studies of a Dynamic C's marketing plan (presented in Chapter 5) for a future Portuguese virtual restaurant with two brands, supported by the market research presented in Chapter 6.
My hope is that these case studies will help future, and present, virtual restaurants to have a better strategic direction, formulation, choice, evaluation, implementation and control. Since multibrand is the biggest advantage for virtual restaurants, this plan will focus on two brands (Case Study 1 and Case Study 2) that can easily coexist in the same dark kitchen, sharing operation costs, diversifying risk and reaching a bigger audience.

Casa de P.U.T.A.s

(Pregos Ultra Temperados e Aromatizados)
The acronym P.U.TA., if read as a word, is a swearword that means prostitute, kind of "bitch", in Portuguese. Some people will dislike this aggressive marketing strategy but others will find it funny and understand the naughty and irreverent humour. One thing is for sure: people are going to talk about it, and it will not go unnoticed.

The first brand products are *Pregos*, a traditional Portuguese sandwich done with buns and a steak. Portuguese don't consider *Pregos* as a sandwich. The term sandwich, for Portuguese, is usually something lighter like ham and cheese.
Pregos are usually served as a quick snack or at "cervejarias" (Seafood or steaks Portuguese traditional restaurants) at the end of a sea food meal. *Prego* can be considered a meal if served with rice and French fries. Both ways are quite popular in Portugal, but some purists are against the later.

Figure 6.1 - The origin of "Pregos" - Velharias de Sintra (1988)

The book "Velharias de Sintra" 1988 edition, mentions Manuel Dias Prego (Figure 6.1), who started a "food and drink" business in Praia das Maçãs at the end of the 19th century. It was a rudimentary location where he served Colares wines and sandwiches with slices of veal, fried or roasted, inside a local rustic tasty bread. The business prospered as well as the fame of "Bifanas do Prego" (Steaks from Prego) (Fernandes, 2017).

The study from the European Journal of Marketing *Impact of product differentiation, marketing investments and brand equity on pricing strategies: A brand level investigation* (Davcik & Sharma, 2015) suggests that brand equity and product differentiation are closely associated with price. Using a cluster analysis, the authors found that the premium price is significantly associated with product differentiation based on innovation and company type. Also, brand awareness has an important influence and create impacts on consumer purchase intention (Chandrasekhar et al., 2019). Therefore, if a virtual restaurant wants to succeed the best way is not to compete on price against big incumbent restaurants, but to create a different brand or products that creates awareness.

6.1 Product

6.1.1 Ingredients

There are two main ingredients that are vital for the product quality: beef and buns. Sourcing these ingredients must be done thoroughly and with careful planning. Not only cost is important, but also the consistency of the ingredient’s quality, logistics and delivery days and times. The product’s pricing goal is to strike an average value from the most direct competitors, that suits the targeted market. Therefore, quality must not be compromised. A sirloin steak can be used only for the premium sandwich and there are industrial processes to tenderize cheap cuts of meat.

6.1.2 Differentiation

The brand name is already setting the marketing positioning. Products will differentiate by some ingredient combinations. Each product will receive a woman’s name that indicates the nationality.
Figure 6.2 is an example of what could be the “Cicciolina Prego”, with Italian food associated ingredients, like tomato, basil and mozzarella. The “Stormy Daniels Prego”, in Figure 6.3, is with American ingredients like Bagels and coleslaw.

Figure 6.2 - Mozzarella, tomato and basil sandwich | Souce: tasteandtellblog.com

Figure 6.3 - Bagel "New York Street" Source: L'Academie du Gout

6.1.3 Production process

Since there are two brands operating in the same kitchen, the menu cannot be extensive, with a limit to five *Pregos*, where three are fixed, one is seasonal and the other is a “wackier” innovation. The same ingredients must be combined to create different products in a way to reduce costs, inventory and waste. For example, tomato can be used to create both, the Italian style and the Greek style *Prego*.
If there is a different bun for a *Prego*, it must be a calculated risk, with expected returns in sales or more brand awareness. The “wackier” innovation is intended more for marketing purposes than direct sales. However, if the product is a sales success, it can go directly into the fixed menu, substituting the one that isn’t performing so well.

Operations with two brands in the same kitchen must be extremely organized. The goal is to use the same human resources and equipment to produce two different kinds of products. Therefore, all staff must be properly trained to have two mindsets while cooking and packaging.
Since *Prego is c*onsidered, by Portuguese, as a good night snack, the service hours can be extended late at night, serving customers at their homes or workplaces during a period where few restaurants are open for business. Doctors, nurses and other night shift workers have little or no offer of food during these late night hours. A virtual restaurant, having a more flexible time schedule operation, can easily test serving at late night hours and check the viability for that market.

6.1.4 Targeted price

The food cost should never be higher than 30%, aiming at 25% of the product final price, before taxes. Competitor prices range from 3.1€ to 11€. The targeted final price, for the sandwiches alone, with VAT, should be between 5€ to 10€, depending on the quality of the ingredients.
The brand can use promotions to sell more in downtime hours. Price can be higher at weekends and cheaper at original times to sale, like happy hours between 15h and 18h.
Late at night, prices can be higher due to lack of competition.
Another pricing tactic is placing the same price in FDAs as the website. But through a direct sale, there can always be a promotion to customers who buy more than one product.

6.1.5 Packaging

Unlike the brand name, the packaging should be discrete, since secrecy is a big part of Strip Bars. A plain box, made with recycled paper with just the icon signature: The red lips as seen in Figure 6.4. Moreover, this is a very cheap packaging option.

Figure 6.4 - Packaging example for Casa de P.U.T.A.s

Using recycle paper and biodegradable paper is very important. According to the survey done for this thesis, 71.3% of the respondents stated that it is extremely or very important the virtual restaurant the use of biodegradable or compostable packaging.

6.2 Customers

According to the survey made for this thesis, sandwiches, as food delivery, are just ordered by 2.6% of the respondents. But *Prego* isn't considered a sandwich by Portuguese but more of a traditional Portuguese "Quick" Food. *Prego* is more suited in the category "Other fast foods*"*, that is more popular for food delivery, with 21.9% of the respondents saying that they usually order.
Using some information from this thesis survey, the preferred food type per age (Figure 5.9) for this product (includes food types MacDonald's, Other fast food and Gourmet Hamburgers) allows us to select the target market: men and women, between 15 to 50 years old. Although

young people from 15 to 26 years old are more price sensitive, they are also more inclined to engage and buy an irreverent brand product.

6.3 Competition

As direct competition there are several restaurants in Lisbon, from low to high end serving traditional *Pregos* and innovation has occurred in the past decade.
There are some new variations and innovations with different types of meat, but also using other regional Portuguese buns, like Bolo do Caco and combining with other ingredients like eggs, cheese, greens and tomatoes. There are even *Pregos* made of cod, salmon and tuna, combined with other ingredients (Guerreiro, 2016). For instance, Prego da Peixaria is a new restaurant (opened in 2013) that serves fish *Pregos* and its success made the entrepreneurs open two new locations in Lisbon and thinking of going abroad.
Table 6.1 - Competition in Pregos Food Delivery shows the most popular restaurants serving food delivery in Alcântara, Campo de Ourique, Belém and Lapa (central Lisbon area) with *Pregos* in their menu. This area was chosen because Alcântara is the location where the virtual restaurant will operate.

Table 6.1 - Competition in Pregos Food Delivery

Brand	Cut of beef	Kind of bun	Sandwich Price	Combo price	Closing hours
Prego Peixaria	Sirloin	Bolo do caco	11€	18.5€[5]	22:00
O nosso prego	Topside	Normal	3.1€	N/A	22:30
O nosso prego	Topside	Bolo do Caco	4.3€	N/A	22:30
Big Prego	Topside	Bolo do caco	5.8€	7.8€	17:00
Sai prego	Rump	Normal	5.5€	N/A	22:30
Dom Prego	Topside	Normal	4.5€	N/A	23:00
Pregaria e Cia	Ox	Normal	8.5€	N/A	22:35
Prego Gourmet	?	Normal	8.65€	N/A	21:50

Most of the competitors are traditional restaurants that started doing food delivery because of the Pandemic to generate other sources of income. However, their menus are not adapted to food delivery, many of them offering “normal” traditional restaurant dishes in their menus. Only two of them offered a combo option including French fries. One of them (Prego da Peixaria) is quite expensive (high end positioning) and the other has no image on Uber Eats and is quite hidden, where customers have to scroll down a lot to find it.
None of these restaurants are offering service via Uber Eats or their channels past 23:00 and some of them close for dinner. In Lisbon, food service is scarce after 23:00. There might be a window of opportunity to provide *Pregos* as a late snack, since there isn’t a direct competition on the market.

6.4 Channels

This is a brand build around its name and to create and promote engagement. Social media like Instagram, Facebook and, maybe, Tiktok are a must.

6.4.1 Social media

Social media will provide a window store for the products as well as a way do spread our engaging and funny communication. Customers that have heard about the brand through word of mouth or on social media should be funnelled directly to the website.

[5] Includes French fries, drink and icecream

Instagram

Instagram is the social network in Portugal that our target market mostly uses and should be the priority content channel.

Facebook

The perceived premises of "if my parents use it, it sucks" presents a challenge for using Facebook. Since this brand target customer has a wide age range, should Casa de P.U.T.A.s be on Facebook and not be so cool or should it be present on that platform? It's still the preferred social media platform representing 88.2% of all Portuguese internet users (Kemp, 2021) so the answer is obvious: it has to be present on Facebook. Facebook platform should be integrated with Instagram and posts have the same content format and type.

TikTok

The new formats, using popular music and templates presents a challenge for a small virtual restaurant owner that is not familiar with TikTok. Content is different and has its own "language". Benchmarking Control Portugal we can see the difference of followers by comparing with Instagram (367k) with only 1.5k in TikTok after one year of existence. Just animating Instagram posts, is not enough. If Casa de P.U.T.A.s wants to be on TikTok, its content must speak the platforms' language or is just waste of time and money.

6.4.2 Website

Figure 6.5 - Kikas La Siesta Website (https://www.kikas-lasiesta.pt)

The look and feel of the website should be similar to Kikas La Siesta, like in Figure 6.5 (a famous Striptease bar near Lisbon - https://www.kikas-lasiesta.pt/). The copy fonts, the colours and kind of amateurish style from the late 90's should be a design reference. However, no image, title, text or graphic should ever suggest women or sex.

It's all about food.

Casa de P.U.T.A.s should present their products in a lusty way, in a clear way that the brand is playing with words and having fun with it.

Digitally there isn't much competition with this brand name used as keywords for engine search. A quick Google search reveals some porn sites, translation sites and on first place, a newspaper article. That means that, with normal basic SEO, Casa de P.U.T.A.s will easily rank well in search engines.

6.4.3 Food Delivery Apps

More than creating a strong relationship and identification, customers browsing FDAs will immediately notice the brand name and triggering clicks into the menu, just out of plain curiosity. In Uber Eats, the brand should choose the main category for sandwiches and Portuguese. In Bolt there are no main categories, but in the normal categories the brand should be present for Fast Food, Portuguese, Meat, Traditional, Casual, Sandwich, Comfort Food and European.

6.5 Content

With all the competition seen above, how to create brand awareness for a new virtual restaurant? Create a different, fun and engaging brand. Having and “aggressive” and irreverent brand does not “per se” attract customers. Just attention. The brand must follow up and capitalize that attention, that is so hard to grab.
This irreverence must be taken with caution. The goal is to never cross the line of being gross and never communicate dirty words or sex. P.U.T.A is just an acronym and all copy and communication should be around food and let the subtext be made in the consumers’ head. The sexual innuendo has to occur in viewers head and not be explicit in brand communication. Content has to funny, engaging and humorous without crossing “the line”. Of course, some people will say that the line has already been crossed even at the “lightest” content posted. So, the real marketing strategy is where to place that line so that, some people will obviously be offended but a big part of the market won’t, as seen by the content marketing strategy of Control Condoms in Portugal. Since it generated good results, it should be use as a benchmark.

Figure 6.6 - Control Instagram Content - (Instagram @controlportugal, 2021)

As seen in Figure 6.6 Control rarely talks about sex, although all they copy has a sexual innuendo. Occasionally they show some of their products, again with copy unrelated to sex. Comparing Control followers in Instagram (363k) with its main competitor Durex (28.8k) we can see that this kind of content is working really well.
Casa de P.U.T.A.s content must always be about food. But there is one thing in common between food and sex: they are both related to catholic sinful behaviours.
Lust is for sex, as gluttony is for food since there are guilty pleasures in both these sins. As we can see in Figure 6.5, some of the copy used either for a company that is selling sex (La Siesta) can be used for a restaurant: “Delight yourself with us”.
Therefore, the type of content can be associated with Gluttony and, with careful use of words the name’s brand. The content is all about food with a witty sexual innuendo. The playful use of

words with different meanings is one of many humour tactics as seen in the content examples created in Figure 6.7 and Figure 6.8.

Figure 6.7 - Content example 1

Figure 6.8 - Content example 2

The differentiator factor is the brand's name. Products need to have, of course, quality, but it's the brand's name and engaging content that will attract customers. Therefore, content is the most important part in this marketing strategy.

6.5.1 Content strategy

Casa de P.U.T.A.s posting frequency and format choices will be created based on weekly big news events, like big football matches, that have big awareness and are in the mind of most people. According to Rui Simas, the creator of Control marketing campaign, "The posts that are most successful are those that are created on top of an event. We are aware of current events and hope that things fall at the right time."(Vidal, 2020)

Other recommendations are:

1. Being careful and unoffensive towards people that dislike the content
2. Being careful with people that are misled and don't think Casa de P.U.T.A.s is actually a virtual restaurant.
3. Post consistently - At least 4 time a week, when audience is online.
4. Use analytics to choose best formats and time.
5. Understand algorithm changes a use them in brands advantage.
6. Remix, reuse and repost top-performing content - The goal here is not to use the same image, but different angles of the same picture. For example, turning a video into a gif or transforming several images into a carousel. Another option, is using those images in stories.
7. Engage in conversations - Use platforms to directly talk to people about their likes in food. Not selling, just engaging in conversations.
    a. Ask questions
    b. Respond to comments (the algorithm counts these as actions)
    c. Reply to comments quickly (while there's no proof the algorithm cares about how fast you respond, you will impress not just one person, but potentially everyone who sees it)
    d. Like and comment on other people's posts (don't just broadcast our own content)

e. Instagram content can showcase the process behind providing the product, the process and the brand culture.
f. For Tiktok and Instagram reels use popular songs at the moment, showing how the products are done in a gluttony guilty way.

Food porn concept

The Food Porn concept is typically referred to watching others cook on television or gazing at unattainable dishes in glossy magazines without actually cooking oneself (Mcbride, 2010).
The reach of #foodporn hashtag across the globe is difficult to understate. However, in the 150 days of the Research Gate study, over 1.7 million individual users tagged their posts with it, making the average rate at 62K posts per day (Mejova et al., 2016).
Food photography (or videography) is the best way to highlight the work of any Food Business. It showcases the artistry of the food and is a way to promote the virtual restaurant products. Especially in a OFD business, after Customer Reviews, Food Photography is the most important thing. It generates engagement and people like to share it with family and friends, increasing reach.
The sense of sight is the most effective one for processing information regarding goods and services. Since the visual sensory system facilitates brand recall and brand recognition, marketers use a wide variety of powerful and specifically selected visual stimuli, such as colour, lighting, packaging or decoration to influence consumer’s implicit (unconscious) and explicit (conscious) consumer purchase behaviour. (Machala, 2014) Food porn is a way of explicitly showcasing product and creating desire and an impulse to buy.
Food porn fits like a glove to this brand. Content marketing can exploit the food porn concept to its limits. Not only in terms of visual images but also in its copy, assuming the food porn concept.

6.6 Customer retention

Content and product are important but must have a follow up.
The brand name and funny content will definitely help with the first sale and experience. It is crucial to retain customers, keeping them close and sales.
An aggressive marketing strategy must follow to get more regular customers.
First, the company needs to ask customers for their data. Since people are not willingly giving up their personal information for free, there are tactics that can be used. The brand can be more than a virtual restaurant. It can be perceived as an exclusive club, that gives access to special promotions only to their best members.
Information like location, date of birth, special anniversary dates, age, gender and preferred food type can help the brand create fun and engaging promotions later.
CRM can be a useful card the brand can play giving exclusive promotions to the members of this “exclusive club”. Data from customers will allow the brand to push interesting notifications in special anniversaries.
UGC can provide also more engagement with the brand. Having digital contests promoting the best and funniest UGC with a meal as a prize can keep customers close.

7 CASE STUDY 2

As stated before, the best advantage of a virtual restaurant is the possibility of having two, or more, brands operating in the same kitchen. If the first Case Study is a more radical and aggressive brand and, therefore, riskier, the second one must be more conservative and formal. If one of the brands does not succeed that doesn't mean that operations must close. A virtual restaurant can easily push forward the brand that is having success. This will support the creation of new brands, replacing those that didn't worked out.

Barrosão

Portuguese beef burgers

Carne Barrosã PDO is a prestigious Portuguese meat, obtained from cattle of the Barrosã breed, which, although it owes its name to the Barroso plateau, started its expansion in Minho. It has its formal headquarters in Boticas, Minho region, and thrives mainly on small family creations. Originally, the cows came from North Africa and "travelling" through Portugal to the north even before more than 1000 years ago. It is the most awarded of the national autochthonous meats. (Camarinha, 2014).

More important than the history is quality recognition. The awareness around Carne Barrosã, as one of the best Portuguese meats, is large and even the famous Michellin starred José Avillez once cooked a Carne Barrosã hamburger in one of his TV shows. (Avillez, 2014). It has great value, independently of the age of the animal: veal, calf or cow.

Hamburgers is one of the most competitive space on the OFD market. Why, then, should a company consider entering this market?

There is a lot of competition, because the demand is also very high. There are many kinds of hamburgers, from McDonald's to almost fine dining gourmet very expensive hamburgers.

Barrosão will try to get a slice of the pie of the hamburgers market by capitalizing on a "proud to be Portuguese" brand. By just using products from Portugal, Barrosão will appeal to Portuguese consumers heart (helping the economy) and also tourists that might want to try what a 100% "made in Portugal" hamburger tastes like.

The beef will be meat from Carne Barrosã (DOP Portuguese Beef) and the buns will be made by local bakers that use only Portuguese grains.

Several years ago, Portuguese brands were perceived by Portuguese as having low quality products. Now, buying "made in Portugal" is trending and Portuguese realize that consuming Portuguese made products is good for the economy and also something to be proud of.

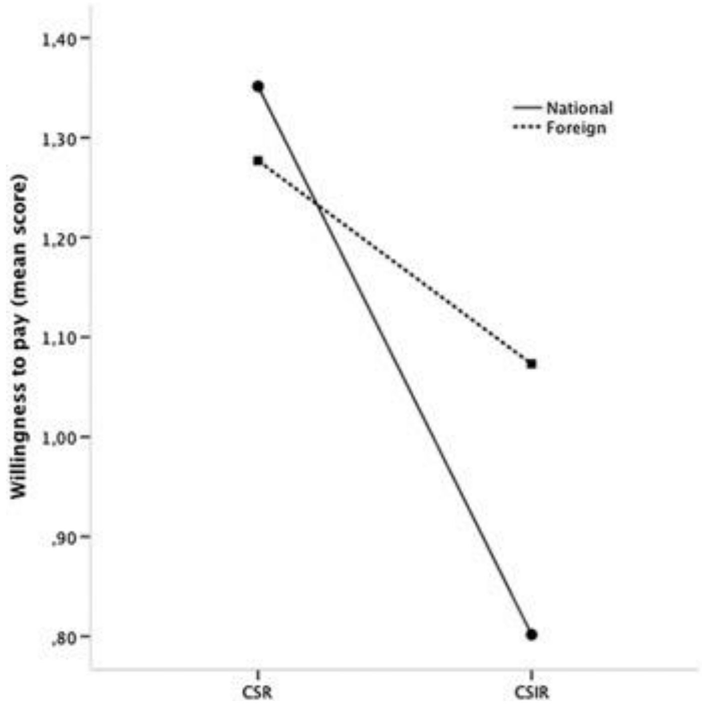

Figure 7.1 Interaction effect of the country of origin on the relation between social (ir)responsibility and willingness to pay.(Ferreira & Ribeiro, 2017)

The Portuguese survey "Are you willing to pay the price? The impact of corporate social (ir)responsibility on consumer behaviour towards national and foreign brands", provided important managerial considerations for marketing managers, by presenting a comprehensive scenario about how consumers react to products from their country of origin vs. foreigner and the social and environmental responsibility shown by that company. (Ferreira & Ribeiro, 2017). The results, in Figure 7.1, show that Portuguese are willing to pay more for products from national brands that show social responsibility, but also are less forgiving if they aren't responsible.
Barrosão will be a proud, and responsible, national brand that promotes Portuguese products.

7.1 Product

Simple burgers!
Where simple doesn't mean low quality or easy. It means few ingredients and that each ingredient was hand picked and carefully chosen to combine with Carne Barrosã, in order to create the perfect Portuguese hamburger. More than excellent, each ingredient comes with a Portuguese surname (like Butter from Azores DOP; or Lettuce from Monte Silveira Bio). The goal is that each ingredient serves a purpose: enhancing the beef quality and not be overpowering in the final product.
This strategy not only will differentiate from the gourmet burgers with expensive ingredients like *Fois Gras*, but it will simplify the operation. This process simplification will allow the existence of two brands operating in the same kitchen.

7.1.1 Ingredients

There are two main ingredients that are vital for the product quality: beef and buns. Regarding beef, that problem is solved since Capolib[6] sells frozen hamburgers with several weights. Bun's

[6] http://capolib.pt/

sourcing will need a bit more work, but there are several craft bakers in Lisbon that deliver, in Lisbon, with recipes for all tastes (Alves et al., 2020).

7.1.2 Differentiation

Product differentiation will be mainly by the beef origin and quality. To better mark that factor, the products' names will have a name that indicates a Minho municipality or city. Ideally, the rest of the ingredients will be famous ingredients from that place. For example, there can be a *Caldo Verde* Hamburger using fried kale as an ingredient, since *Caldo Verde* is a typical dish from Minho.

7.1.3 Production process

Menu will be similar to previous brand, therefore limited. They can share some products like French Fries. There must be a limit to five hamburgers on the menu, where three are fixed and two are seasonal, using season products.
Like the previous brand and by sharing kitchen operations and time of service, the service hours can be extended late at night, serving customers at their homes or workplaces during a period where little restaurants are open for business. Burgers is the perfect late night meal for hungry customers.

7.1.4 Targeted price

The food cost should never be higher than 30%, aiming at 25% of the product final price, before taxes. Competitor prices range from 4.85 € to 15 €. The targeted final price, for the sandwiches alone, with VAT, should be between 6.5 € to 9.5 €, depending on the quality of the ingredients. Pricing for this brand should not be subjected to the same flexibility as the previous brand. Different prices, depending on the channel or time of sale, can be perceived as price discrimination and affect the brand image. Content and communication are around a mission and cause bigger than profit, not to be undermined by bad pricing.

7.1.5 Packaging

More than brand visuals, the packaging should include the Made in Portugal icon/logo. Therefore, packaging design must have, like in Figure 7.2:

- Brand name,
- Brand logo,
- Signature: "100% Carne Barrosã",
- Call to action to order via website/phone to avoid FDAs commission fees.
- Bio degradable stamp
- "Made in Portugal" copy
- Portuguese flag or icon

Since this brand is related to nature, packaging must be accordingly. Again, the results of the survey done for this thesis show that only 11.7% of the respondents stated they don't care about packaging being eco-friendly. Therefore, being a close to nature and responsible brand, packaging must be eco-friendly and, ideally, biodegradable.

Figure 7.2 - Barrosão packaging example

7.2 Customers

According to the survey done for this thesis, hamburgers are ordered from young people to middle aged. However, Barrosão will target the middle age segment (26 – 50 years old from, since, according to Figure 5.10 and Figure 5.11, they order more OFD and are willing to pay more, valuing a better quality product. They are also the ones that order more gourmet burgers (Figure 5.9 - Food type preferences per age)

7.3 Competition

According to TimeOut Lisbon, Figure 7.1 shows the best hamburgers in Lisbon (Camacho, 2017):

Table 7.1 - Best hamburgers in Lisbon (TimeOut, 2017)

Brand	Beef	Bun	Differentiator	Price
Ground burguer	Angus	Milky	Chilli	12.00 €
B'perfect burguers	Brand mix	Milky	Quail eggs	7.00 €
Carnalentejana	Carnalentejana	Brioche	Roquefort cheese	7.50 €
Galeto	Normal	Brioche	Late hours	4.85 €
U-try	Normal	Milky	Eddam & bacon	9.10 €
Honorato	Normal	Normal	Big chain	10.80 €
To.B	Normal	Light and small	Bacon & cheddar	8.80 €
Hard Rock café	Beef & pork	Sweet	Onion ring	15.75 €
Cultura do hamburger	Normal	Fluffy	Manchego & bacon	7.30 €

Regarding places that sell hamburgers using Barrosã beef, there is one hotel in Boticas (Minho Region) and there was one traditional restaurant in Lisbon that served Carne Barrosã and also hamburgers. These are not considered direct competition, since the first is in a different location and the other has closed.

In terms of brand name, there is one Barrosão Hamburgers, but in Brazil and the only Barrosão registered in Portugal is under the Nice Classification number 42, and not 43 (restaurants).

In the above benchmark, the only brand that uses a Portuguese DOP beef for their hamburgers is Carnalentejana at a price of 7.50 €. But even this brand uses Roquefort cheese as a differentiation factor, not focusing on the beef "pedigree".

7.4 Channels

The "proud to be Portuguese" positioning is perfect for social media engagement. Like Casa de P.U.T.A.s, social media will provide a window store for the products and show why they are different and special.

Being a virtual restaurant, like the brand Casa de P.U.T.A.s, Barrosão must also be present in all FDA available for its locations.

7.4.1 Social media

Social media has the goal to increase brand awareness, but, also, direct traffic to Barrosão website towards a sale. Content formats should be accordingly to the platforms' algorithm preferences at the moment.

Instagram and Facebook

The targeted customers are similarly present in Facebook. Facebook can be created and customized as a "micro-site" containing all Instagram content and more content from the website. Reviews and conversations with customers are very important here.
Brand should also be present at foodies' groups and other groups associated with gastronomy. In these groups, sales are never to be pushed, but just other useful content for the readers.

LinkedIn

If TikTok is a platform not to be present, LinkedIn, on the other hand, is quite appealing. Not to sell products directly but to help brand awareness and positioning. Since Barrosão mission is to help Portuguese Economy by promoting its products, what better social media platform to do this, than the Microsoft business-oriented network? LinkedIn content has its specific language. It's used to promote business achievements and other business related information. Barrosão is promoting several other Portuguese businesses with a clear message: "…we are all in this together, and it's together that we shall overcome. Helping the Portuguese economy isn't just one government decision. It's every action, that we do everyday, every decision from everybody that counts."
By promoting others, Barrosão is promoting itself.

7.4.2 Website

The Barrosão website has several functions. The first is sales.
But the website will also help positioning the brand as a proud Portuguese brand, that has a mission: help the Portuguese Economy by promoting Portuguese products.
Therefore, more than just a menu and shop, like in Figure 7.3, the website must include a blog with articles that are useful and interesting to readers, invite external writers to post and other information about Carne Barrosã and other Portuguese products.

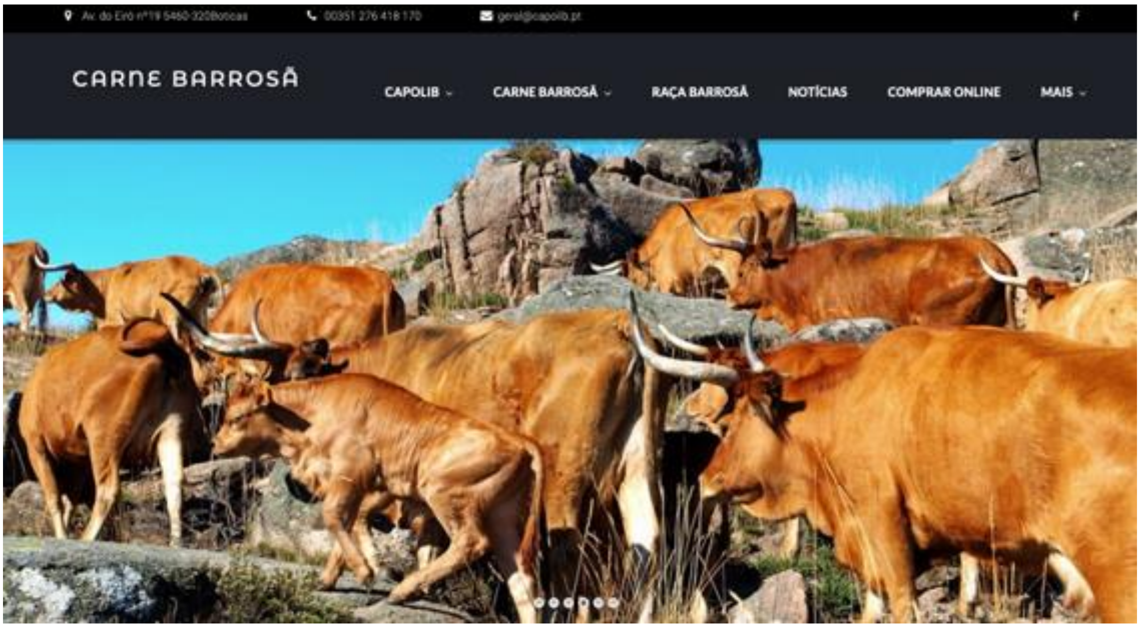

Figure 7.3 - Capolib.pt - website design reference

There also must be an opt-in page to collect emails for a monthly newsletter.
The website must have a sober and professional look and feel with fonts and colours transmitting green and nature elements
For organic searches on search engines, the brand keywords are not easy. That doesn't mean they are difficult. A good content strategy will enable SEO by getting valuable backlinks enabling first page rank after 1 year.

7.4.3 FDA third party category placement

In Uber Eats, the brand should choose the main categories: Hamburgers and Portuguese. To better capture attention, the signature "100% carne barrosã" must be always present.

7.5 Content

The brand must transpire "Proud to be Portuguese".
Barrosão content will define the brand positioning and create an emotional link with consumers. It is not a funny brand but a proud brand.
The brand persona is proud and assertive: "Portuguese products are great and they were neglected for several years. Now, is the time to show Portuguese and the World what Portugal has to offer." Always in a positive note, not undermining foreign products, but showing good things made in Portugal.
Partnering with Portuguese producers will help to have free marketing materials and get more engagement. Barrosão has a cause: help Portuguese economy by promoting the nation's products! By having a cause, it will generate a bigger audience and engagement that believe in that cause either. When brands match activist messaging, purpose, and values with prosocial corporate practice, they engage in authentic brand activism, creating the most potential for social change and the largest gains in brand equity (Vredenburg et al., 2020).
Barrosão can even go further than partnering only with their suppliers. It can promote other Portuguese products that are not used in its hamburgers. The message isn't just good quality hamburgers. The focus of the message is "we are going over an economic crisis and it's Portuguese responsibility to prefer Portuguese products".
Figure 7.4, Figure 7.5 and Figure 7.6 below, are examples how Barrosão, as a brand, has a lot of more content for social media, than just its products. This is a big differentiation factor from competitors that post mostly their products.

Figure 7.5 - Barrosã Cow - (Source: Capolib)

Figure 7.6 - Instagram post (@mannygaipo1)

Figure 7.4 - Instagram Post (@aa_cre8tive)

There is a world of content that can be posted on the website and shared across social media:

- Articles about Portuguese Gastronomy History
- How to guides – E.g., "how to cook a Barrosã steak to maximize its flavour"
- External writers' content
- News about gastronomic Portuguese products

- Portuguese products international awards and conquests.
- Health - promote Carne Barrosã as healthier to human health, being rich in omega 3 and 6 and low cholesterol.
- UGC not only from brand products but also about the ingredients, in this case Carne Barrosã.
- Partners content – promoting partners and suppliers will give Barrosão more credibility, more authenticity and, also important, help promote Barrosão mission as a sustainable brand that wants to help the Portuguese Economy.
- Meat quality – multiple awards, considered by many the best Portuguese meat.

In terms of formats, content can include videos and images to support text.

7.5.1 Content Strategy

Never stop uploading!
Use all the content formats and possibilities mentioned above to create content. Since most of the content is not to promote the brand itself but others and the "Portuguese cause" it won't be repetitive and cause fatigue.
For Instagram and Facebook, it is recommended to produce personalized videos of brand ambassadors, owners and cooks visiting the DOP region. This content will show the healthy environment where cows live and interview producers, their struggles and their efforts to produce "the best" Portuguese meat. Figure 7.7 is an example of a genuine meat producer and by helping them, the brand is getting a stronger market position.

Figure 7.7 - Carne Barrosã producer (Source: Correio da Manhã)

This content strategy does not focus on brand products. But in establishing an emotional link with consumers and reaching a bigger audience. This is a mean towards sales. The brand's products will follow.

7.6 Customer retention

Interesting and useful content will help customer retention. Barrosão website can create incentives to collect emails for monthly newsletters to keep pushing its content.
Customers for Barrosão are more than sales. They are partners in Barrosão mission to help Portuguese economy. If customers are engaged in this cause, they will be also brand ambassadors, provide UGC and promote the brand with family and friends.

8 CONCLUSIONS AND RECOMMENDATIONS

Online food delivery services have shown no signs of slowing down in their rapid growth and expansion in the past decade. Future forecasts project even more growth around the World. The heterogeneity across different types and age of consumers suggests that convenience is a major factor in determining whether a consumer will order a meal using online food delivery services. Younger generations value time and convivence more than their fathers. More, online food delivery services appear to be drawing in consumers that do not typically spend a lot at restaurants. Finally, examining sales on a year-over-year, in USA and UK, shows that the substitution of brick-and-mortar sales has increased over time.

Virtual restaurants are popping up around the world to serve these customers with reduced costs.

In Portugal, however, not all is roses for virtual restaurants. Portuguese Food Delivery ARPU is extremely low, compared to other OECD countries and FDA commission fees are high and growth and penetration rates don’t present the same high forecasted values.

Marketing is essential for this type of business for two main reasons. First, being a virtual restaurant, it is difficult to create an emotional link with customers. Second, good marketing will provide virtual restaurants a stronger market positioning, allowing them to have higher prices than competition and, thus, better margins.

Cutting costs is a big part of a virtual restaurant and usually they have few employees and the owners themselves are the Marketing Department and its CMO. Some of them are Chefs with little, or no, marketing knowledge or experience. Marketing can be complex and with the rise of digital marketing, new tactics and strategies change, as algorithms evolve and new platforms become trendy. This thesis adapts the 7Ps marketing mix and 4Ss web marketing mix to create a simple and more direct Virtual Restaurant Marketing Mix, in order to help virtual restaurant owners.

This Dynamic C’s approach allows virtual restaurant owners to create their marketing plan in little time and have a better marketing strategy for their business.

In Portugal, traditional restaurants can be successful by having only good food. Word of mouth usually takes care of the rest and they have zero budget for marketing. But in a virtual restaurant, the experience isn’t valued, but convenience. It is a lot more difficult to get noticed in the middle of the digital noise. It is not enough, for a virtual restaurant to “be good”. It has to look good. More, different. If, for one hand virtual restaurants have lower costs and an increasing demand, they also have to compete with other virtual restaurants, traditional restaurants and pay high commission fees to platforms. In the current Portuguese economy and market, marketing presents as the best way to help a virtual restaurant differentiate from others, get attention and, at the end, the most important goal of marketing: sales.

Limitations and future work

The two brands presented in this thesis are projected to launch before the end of 2021 as a practical test of this marketing model.

As with any study, this thesis is subject to several limitations which must be acknowledged. Firstly, while the scope of the review was global in nature, the fact that the OFD sector is more developed in other countries meant that a large proportion of the referenced articles included herein are from research and articles from those countries. Secondly, since OFD is a relatively new industry with massive changes and evolution in the past 5 years, studies and research are scarce. Future research should explore OFD in Portuguese contexts to help Portugal OFD industry catch up with the other more mature markets.

Thirdly, a notable limitation in being able to generalize findings from the studies and researches to date, where the target populations are usually university students and not exceeding more than 100 respondents. The majority is even half this number. The quantitative research done for this thesis aimed for a better and clearer view of the Portuguese market, collecting answers from a broader spectrum of people and ages groups. A new and better structured research should be made again. Not only to correct these limitations, but, because this industry is evolving at such a fast pace, this research will soon be obsolete.

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10 ANNEXES

10.1 Annexe A – Portuguese Questionnaire

Questionário de 3 minutos para ajudar refugiados

Ok, menti. Este questionário não vai ajudar nenhum refugiado a não ser eu, porque tenho 3 filhas e se o confinamento regressar, começa a ser uma possibilidade real. Até lá, este questionário é um breve estudo de mercado para eu terminar a minha Tese de Mestrado de Ciências Gastronómicas.

Irá servir para analisar o potencial de mercado para as novas tendências de mercado de take away e food delivery (serviço de entrega ao domicílio).

Obrigado por me ajudar.

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* Required

1. Já comprou comida em take away ou entrega ao domicílio? * *Mark only one oval.*

   - ◯ Sim
   - ◯ Não

2. Se respondeu não, por favor, indique as razões e está despachado(a). Foi rápido afinal.

   ____

3. Quando compra, prefere levantar no local (take away) ou entrega no domicílio (food delivery)?

   Mark only one oval.

   - ◯ Take away
   - ◯ Food Delivery

4. Costuma comprar para casa ou escritório?

   Mark only one oval.

   - ◯ Casa
   - ◯ Escritório
   - ◯ Os dois, casa e escritório

5. Como é que costuma comprar?

Check all that apply.

- Encomedou previamente take away para levantar no restaurante ou espaço de take away
- Foi a um restaurante ou espaço de take away e escolheu o que comprar nesse momento
- Encomendou via plataforma de food delivery (Uber Eats, Glovo, Nomenu, etc.)
- Encomendou por chamada telefónica para entregarem ao domicílio
- Encomendou através de redes sociais/whatsapp para entregarem ao domicílio
- Encomendou no website do fornecedor para entregarem ao domicílio

6. Qual a forma preferida para comprar comida pronta?

Mark only one oval.

- Encomedar previamente take away
- Ir a um restaurante ou espaço de take away e escolher o que comprar nesse momento
- Encomendar via plataforma de food delivery (Uber Eats, Glovo, Nomenu, etc.)
- Encomendar por chamada telefónica
- Encomendar através de redes sociais/whatsapp
- Encomendar no website do fornecedor

7. Qual a segunda forma preferida para comprar comida pronta?

Mark only one oval.

- Encomedar previamente take away
- Ir a um restaurante ou espaço de take away e escolheu o que comprar nesse momento
- Encomendar via plataforma de food delivery (Uber Eats, Glovo, Nomenu, etc.)
- Encomendar por chamada telefónica
- Encomendar através de redes sociais/whatsapp
- Encomendar no website do fornecedor

8. Qual a terceira forma... Estava a brincar, senão passo eu mais tempo a analisar dados. Mas fica aqui uma pergunta bónus antes da segunda parte do questionário. E quem acertar ganha um prémio no final. Preferem comprar comida pronta a comer ou para aquecer/terminar em casa posteriormente.

Mark only one oval.

- Pronta a comer
- Para reaquecer/terminar em casa.

9. Quantas vezes compra comida via plataforma no smartphone (Uber Eats, Glovo, etc)?

Mark only one oval.

- 1 vez por mês
- 2 vezes por mês
- 1 vez por semana
- 2 a 4 por semana
- 5 vezes ou mais por semana
- Nunca, sou old school e para mim take away é só frango de churrasco do Macias

10. Quais as plataformas que utiliza?
Escolher as que costuma procurar refeições, mesmo que compre sempre nas mesmas.

Check all that apply.

- Uber Eats
- Bolt
- Glovo
- No Menu Send Eat
- Sushi at Home
- Comer em casa
- Too Good Too Go
- Outra
- Cookoo
- Kitcsh
- Dark.pt

11. Decisão de compra
Porque escolhe um restaurante em vez de outro? Pode haver mais que uma razão

Check all that apply.

- Qualidade da comida
- Mais baratucha, mas não sou pobre
- Promoções
- Tipo de comida (Vegan, Hamburguers, Sushi, etc)
- É a minha mulher que escolhe e eu como e calo
- Sou eu que escolho e o meu marido come e cala

12. Tipo de comida
Qual o tipo de comida que costuma pedir?

Check all that apply.

- Comida caseira
- Vegan ou vegetariana
- Hamburguers Gourmet ou artesanais

- Mac Donalds
- Outra de fast food
- Sandochas bem feitas
- Temático (Indiano, Italiano, Azerbeijanês, etc.)
- Sushi
- Churrasco
- Saladas
- Sobremesas e gelados
- Comida saudável
- Comida orgânica e bio
- Comida sem alergénicos ou intolerâncias alimentares
- Outra qualquer que me dê na vinheta na altura

13. De 1 a 5 qual a sua inclinação a comprar e receber um pacote semanal de refeições congeladas ou frescas? *

Mark only one oval.

	1	2	3	4	5	
(Pouco inclinado, tipo Torre de Pisa						(muito inclinado, tipo coqueiro que o Cavaco subiu

14. Faixa Etária
Alguns dados demográficos para isto parecer um estudo profissional. (são anónimos por isso, senhoras, não mintam na idade).

Mark only one oval.

- Estou no Tik Tok (entre os 15 e 25 anos)
- Sou millenial e sei o que é uma selfie (entre os 25 e 40 anos)
- Geração rasca e arredores (entre os 41 e 50 anos)
- Não sei quando entro na reforma (entre os 51 e 65 anos)
- O que é o Tik Tok? (acima de 66 anos)

15. Onde vivem?

Mark only one oval.

- Grande Porto
- Grande Lisboa
- Grande Nelas (capital mundial do Food Delivery)
- Outro local porque gosto de ter qualidade de vida

16. Sexo
Não é para escrever muito ou pouco.

Mark only one oval.

- Sou muito macho
- Sou uma princesa
- Mudei há algum tempo como o filho do Néné

17. Número de pessoas no agregado familiar

Mark only one oval.

- 1
- 2
- 3
- 4
- 5
- 6 ou mais (Coitados. Colégios internos no estrangeiro não vos faz maus pais. Pensem nisso)

18. ÚLTIMA - Qual a importância do fornecedor de comida usar embalagens biodegradáveis ou compostáveis?

Mark only one oval.

	1	2	3	4	5	
Tão importante como o Michael Thomas para o Benfica em 1998						Tão importante como a vacina do Covid-19

Obrigado pela ajuda. Para verem se responderam tudo certo, e ganharam um prémio, cliquem em submeter.

10.2 Annexe B – Questionnaire English

Introduction

This questionnaire is a brief market study to help me finish my Master's Thesis in Gastronomic Sciences.
It will serve to analyze the market potential for new market trends in take away and food delivery (home delivery service).

Thanks for helping me.

Questions

• Have you ever bought takeaway or home delivery food?
• If you answered no, please explain why.
• When buying, do you prefer to pick up on the spot (take away) or home delivery (food delivery)?
• Do you usually buy for home or office?
• How do you usually buy?
• What is the preferred way to buy ready-to-eat food?
• What is the second preferred way to buy ready-to-eat food?
• They prefer to buy food ready to eat or to heat up/finish at home later.
• How often do you buy food via the smartphone platform (Uber Eats, Glovo, etc)?
• What platforms do you use?
• Why choose one restaurant over another? There may be more than one reason
• What kind of food do you usually order?
• From 1 to 5, what is your inclination to buy and receive a weekly package of frozen or fresh meals?
• Age group
•Where do you live?
• Sex
• Number of people in the household
• LAST - How important is it for the food supplier to use biodegradable or compostable packaging?

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