Market Intelligence:
Methodology & Landscape

![Brizo foodmetrics logo]

menus

Web traffic

Parent companies

firmographics

Review sites

Web listing pages

Corporate website

Opening hours

technographics

Chains & franchi...

ingredients

At Brizo FoodMetrics, we:

1. Collect

the online footprint of the foodservice industry from highly-credible sources

2. Digest

cleanse, enrich & aggregate raw data into 1.9M+ foodservice establishment profiles 🇺🇸 🇨🇦 🇬🇧 🇮🇪
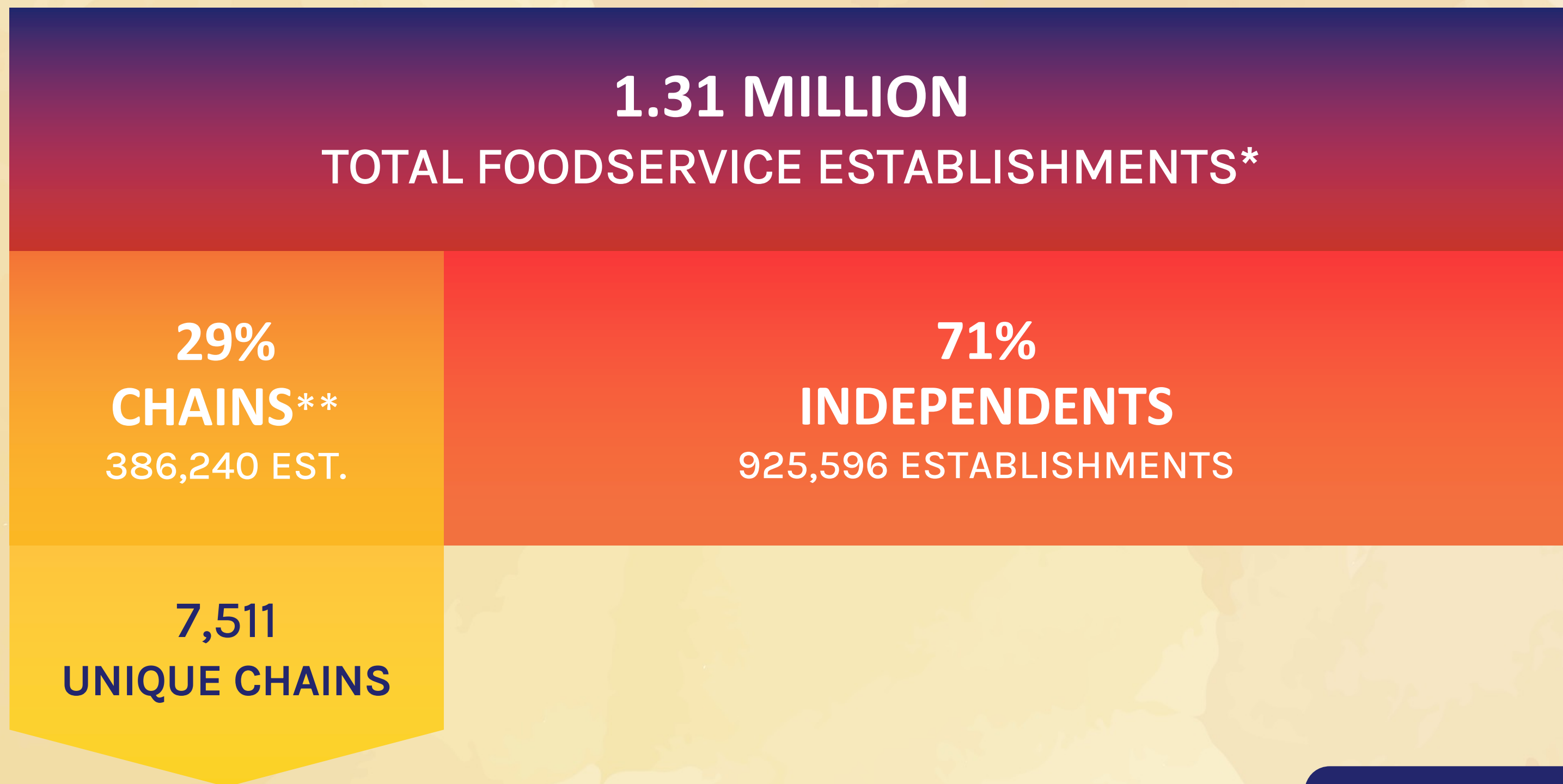
3. Optimize

translate our data into actionable insights via a user-friendly market intelligence platform

4. Track

industry changes over time with historical data

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US Foodservice Market Overview 🇺🇸

1.31 MILLION
TOTAL FOODSERVICE ESTABLISHMENTS*

29%
CHAINS**
386,240 EST.

71%
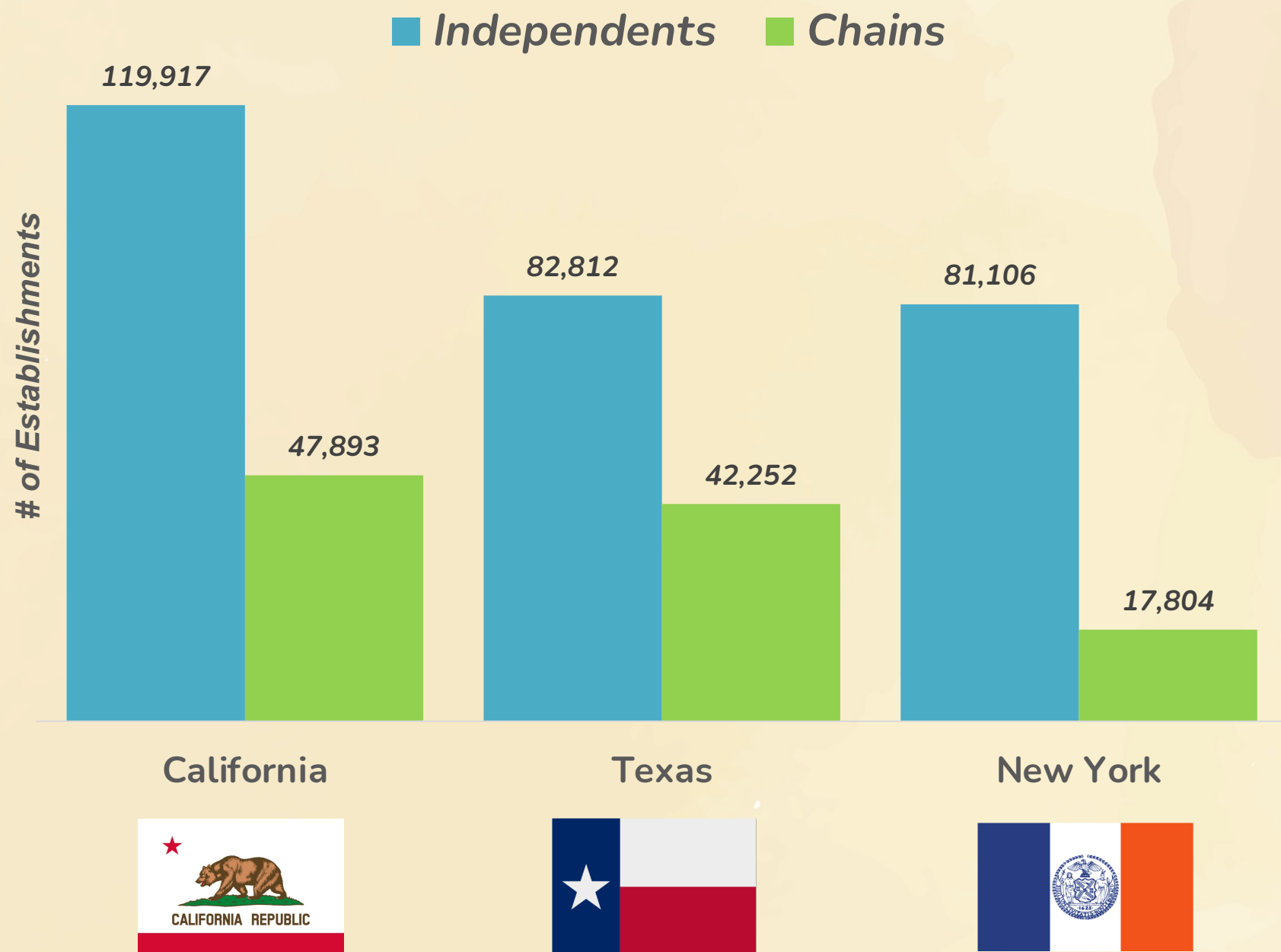### INDEPENDENTS
925,596 ESTABLISHMENTS

7,511
UNIQUE CHAINS

* Across 15 business types (see Appendix)

** Where chains are defined as 5 or more establishment locations

Source: Brizo FoodMetrics, April 2024
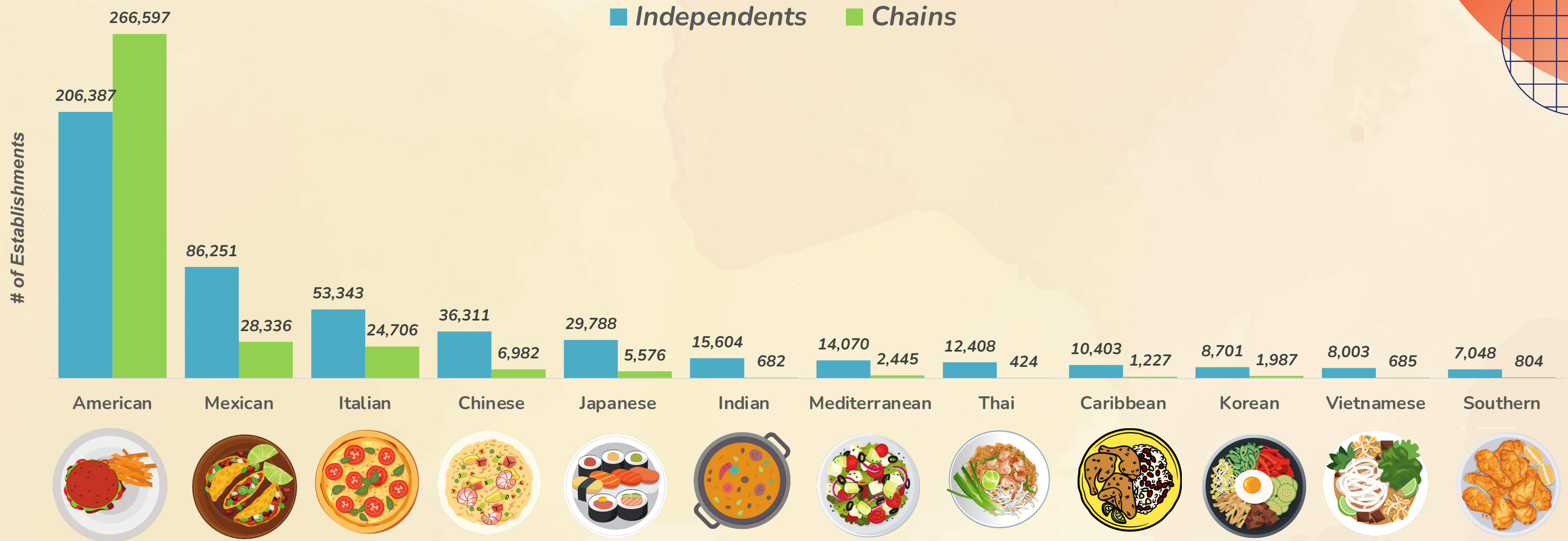
Geographic Distribution

Top 3 States

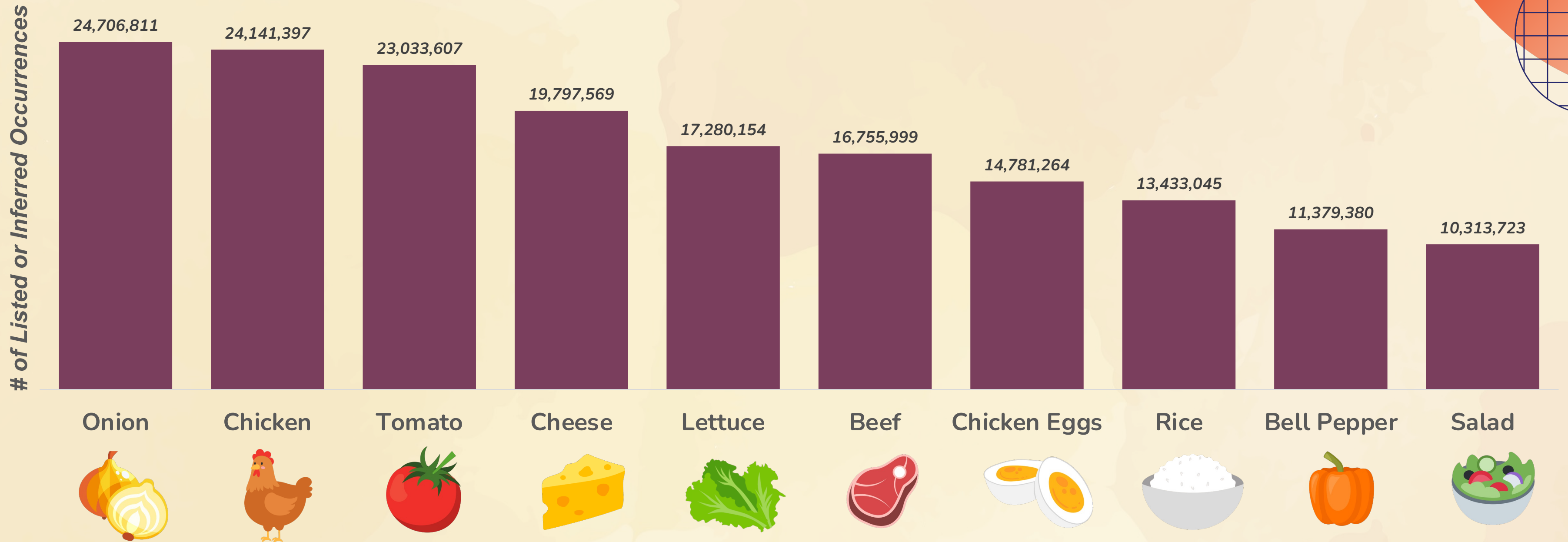■ *Independents* ■ *Chains*

# of Establishments

- California: Independents 119,917 | Chains 47,893
- Texas: Independents 82,812 | Chains 42,252
- New York: Independents 81,106 | Chains 17,804

Top 3 Metro Areas

■ *Independents* ■ *Chains*

# of Establishments

- New York: Independents 86,249 | Chains 18,156
- Los Angeles: Independents 45,259 | Chains 17,468
- Chicago: Independents 26,791 | Chains 11,472

Source: Brizo FoodMetrics, April 2024

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What is America Eating?

Top 12 Cuisine Types

■ *Independents*　■ *Chains*

# of Establishments

Cuisine	Independents	Chains
American	206,387	266,597
Mexican	86,251	28,336
Italian	53,343	24,706
Chinese	36,311	6,982
Japanese	29,788	5,576
Indian	15,604	682
Mediterranean	14,070	2,445
Thai	12,408	424
Caribbean	10,403	1,227
Korean	8,701	1,987
Vietnamese	8,003	685
Southern	7,048	804

What is America Eating?

Top 10 Ingredients*

of Listed or Inferred Occurrences

Onion	Chicken	Tomato	Cheese	Lettuce	Beef	Chicken Eggs	Rice	Bell Pepper	Salad
24,706,811	24,141,397	23,033,607	19,797,569	17,280,154	16,755,999	14,781,264	13,433,045	11,379,380	10,313,723

* Where these ingredients are listed on the menu or inferred through Brizo's machine learning

Source: Brizo FoodMetrics, April 2024

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What is America Eating?

Top 3 Dishes

Independents
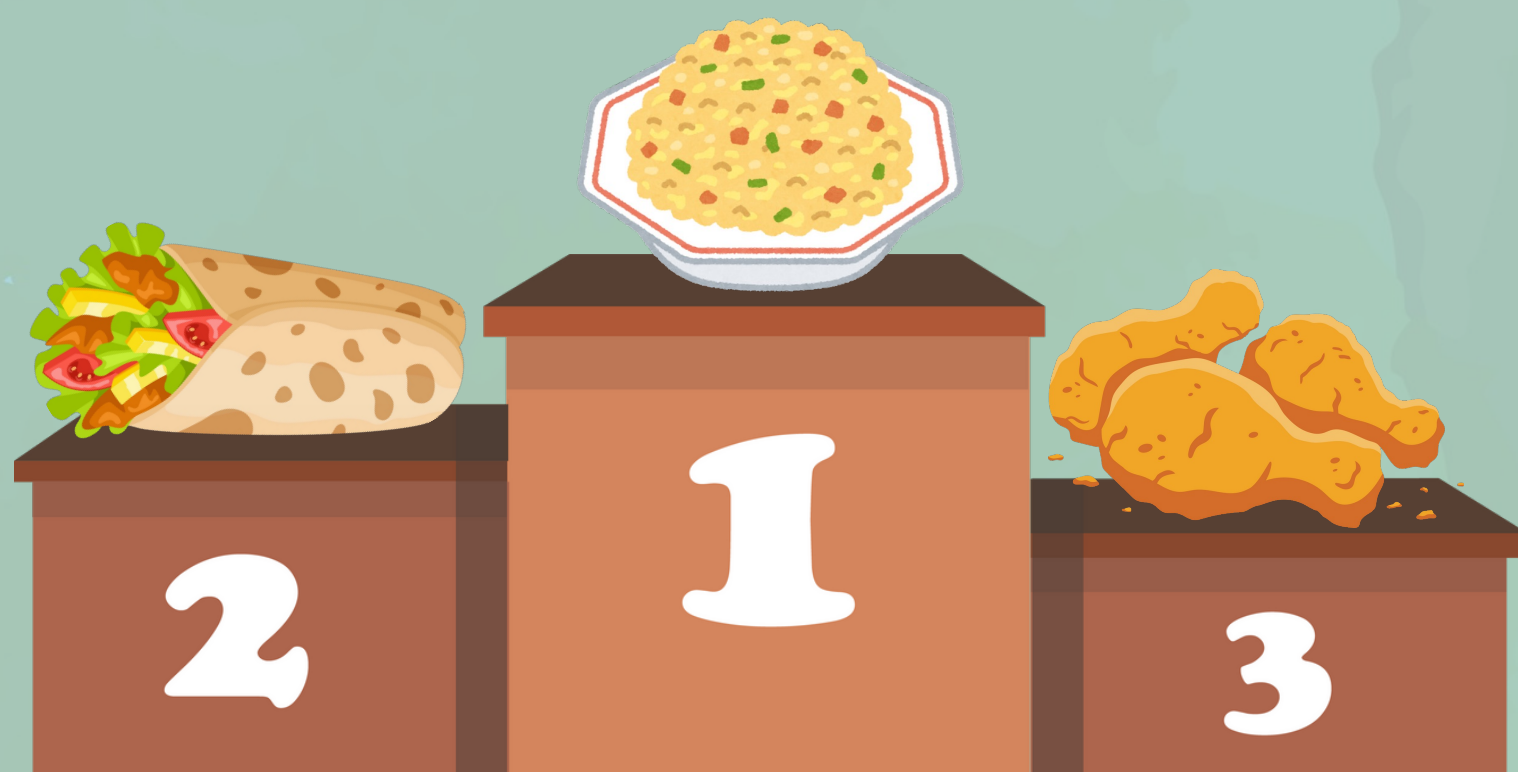
2 — Wrap
Average Price: $11.68

1 — Fried Rice
Average Price: $11.18

3 — Chicken Wings
Average Price: $14.65

Chains
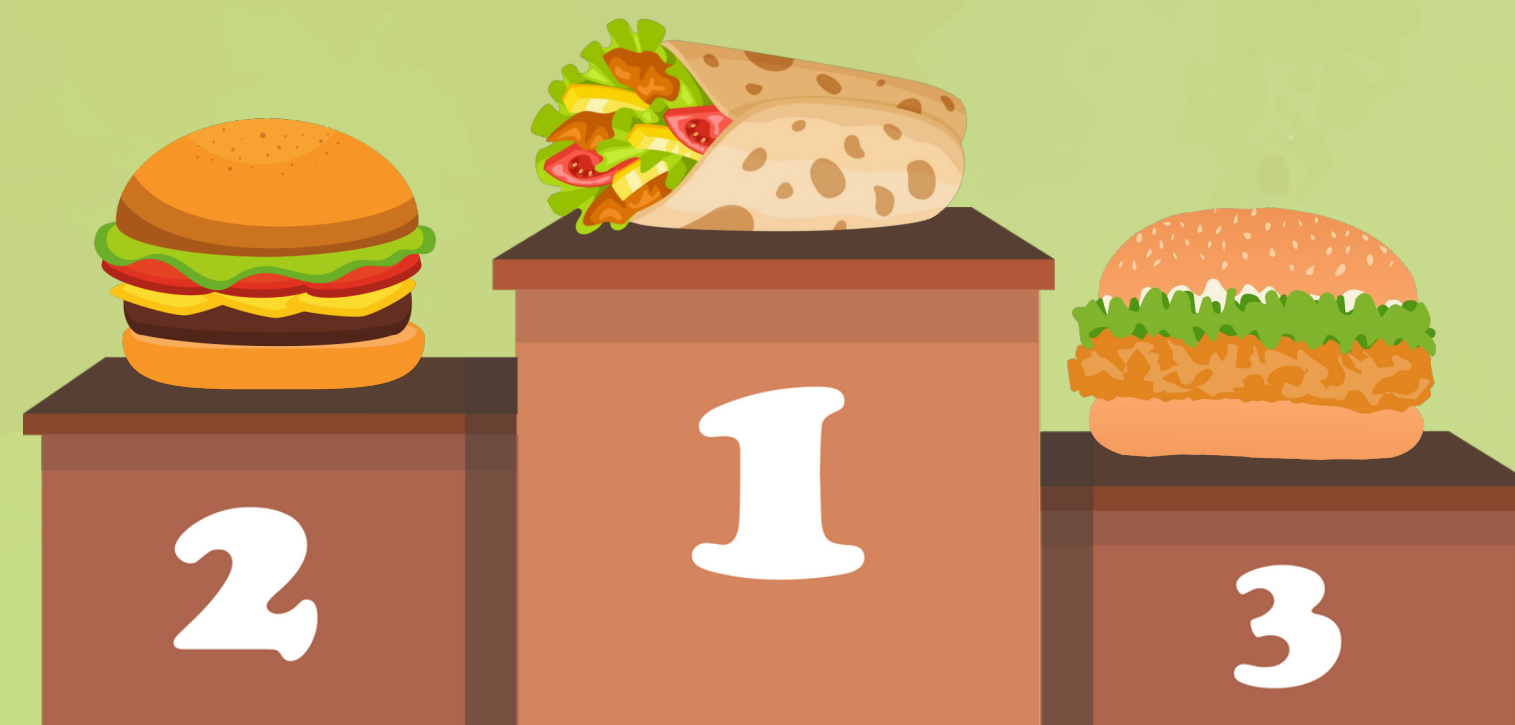
2 — Cheeseburger
Average Price: $8.67

1 — Wrap
Average Price: $9.43

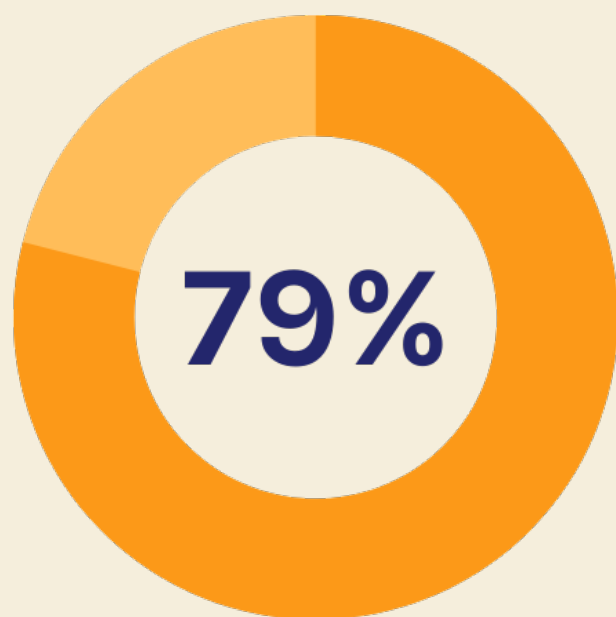3 — Chicken Sandwich
Average Price: $10.27

Source: Brizo FoodMetrics, April 2024
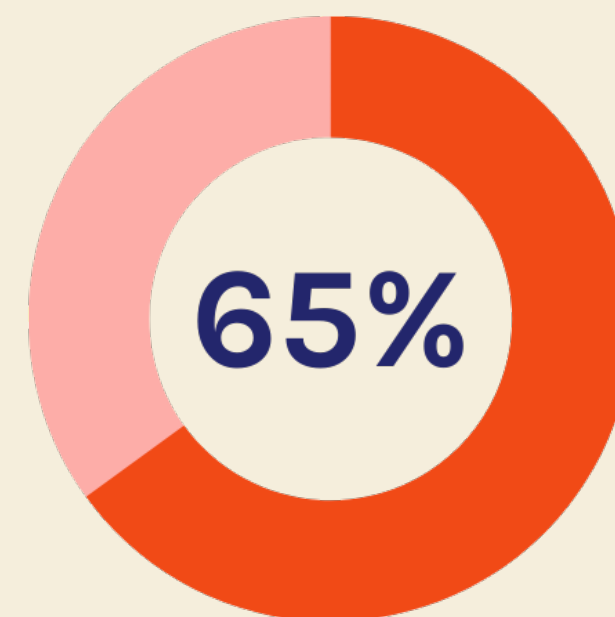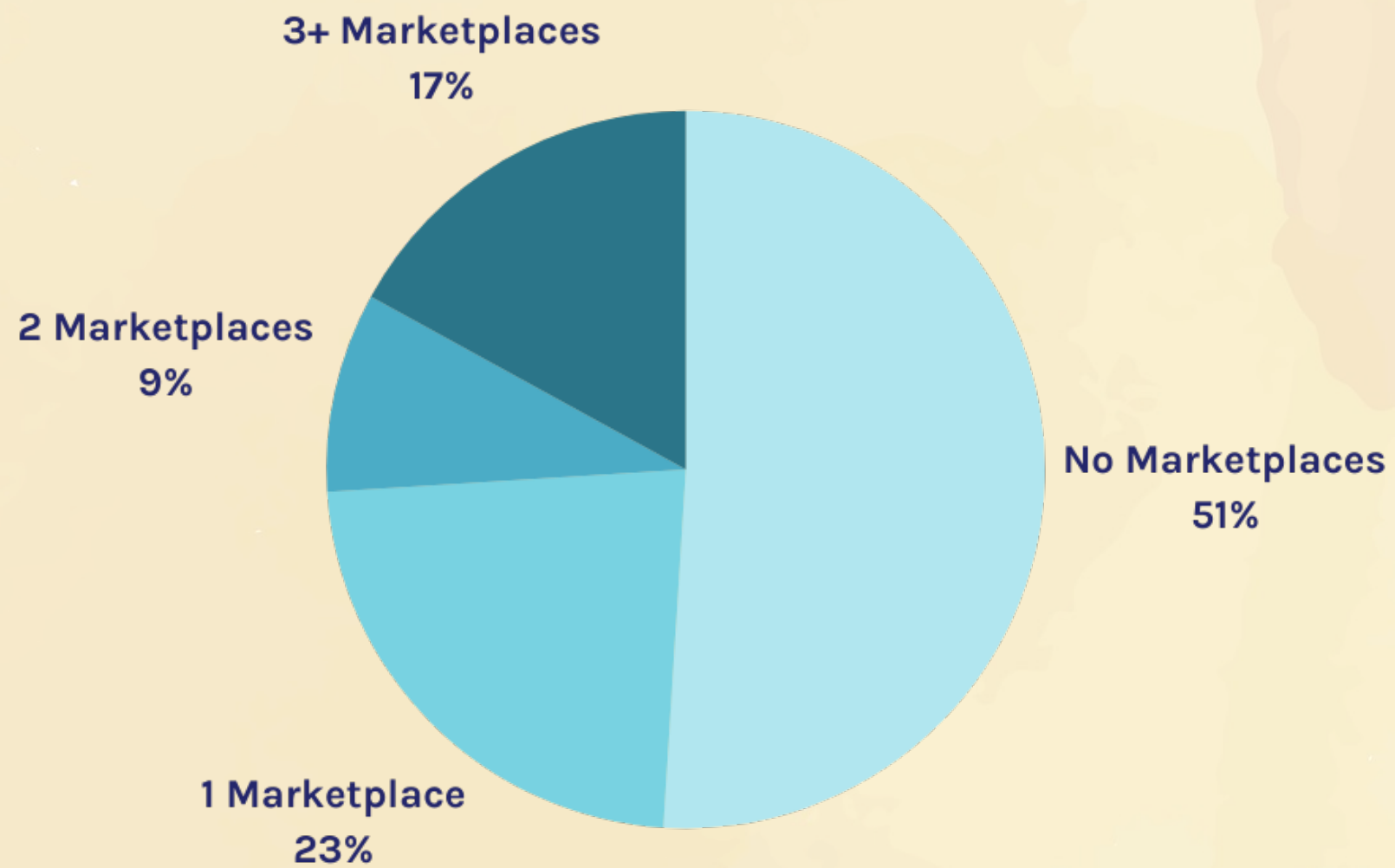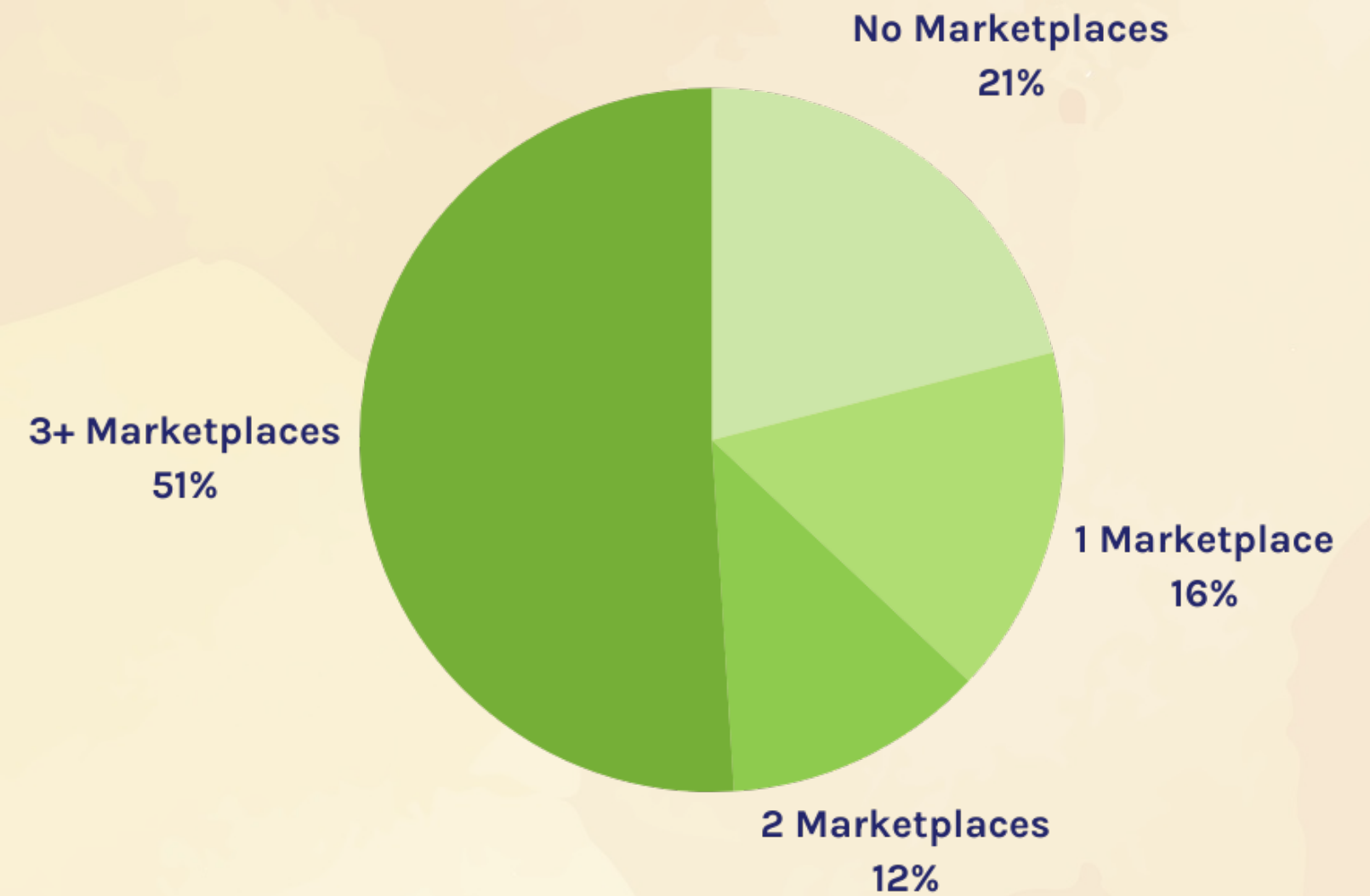
Top Delivery Marketplaces

for US Foodservice Establishments

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■ *Independents* ■ *Chains*

# of establishments

Marketplace	Independents	Chains
DOORDASH / caviar	339,253	293,737
GRUBHUB / seamless / MENUPAGES	308,259	276,493
Uber Eats / POSTMATES	247,387	327,941
toast Marketplace	61,849	13,913
ezcater	21,064	49,815
slice	16,255	3,103
delivery.com	5,730	5,923

Source: Brizo FoodMetrics, April 2024
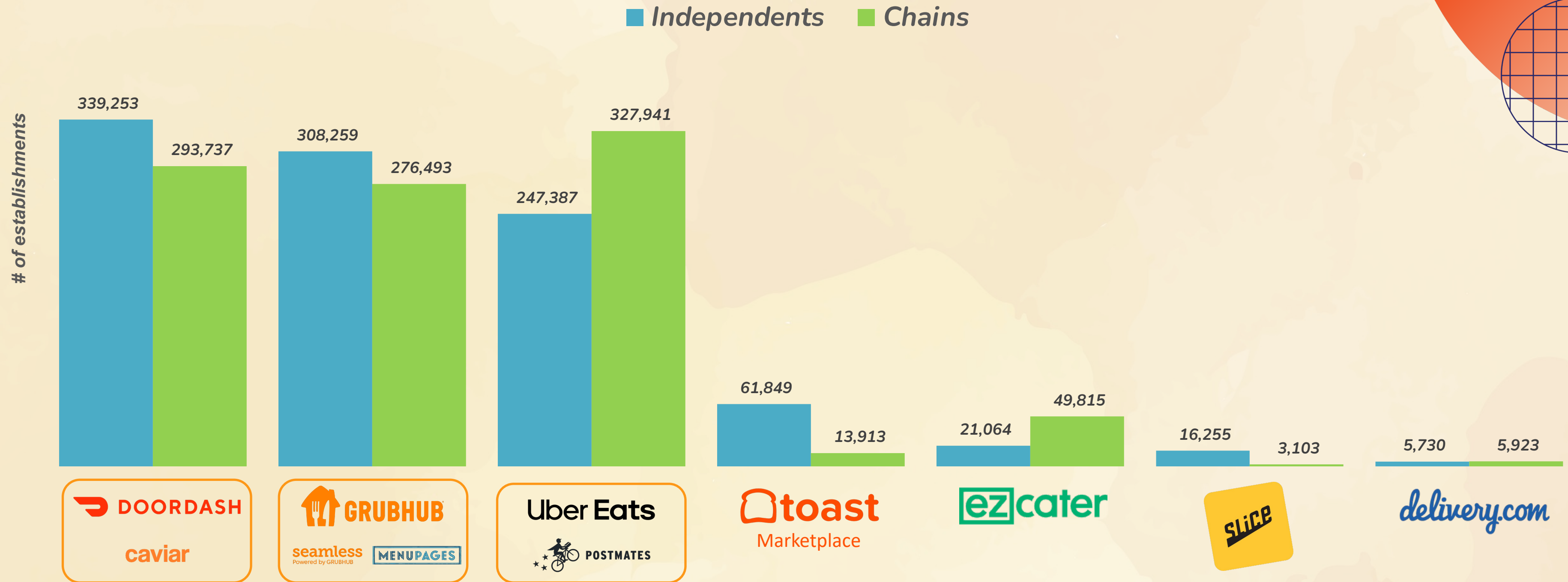
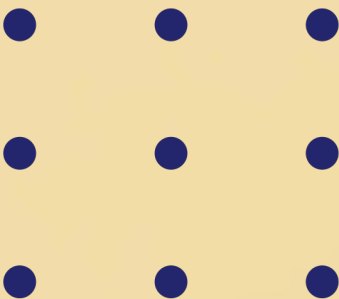# Establishment Density & Third-Party Delivery:
A Data Deep-Dive

Establishment Density:

Density of foodservice establishments within 5 miles of each other

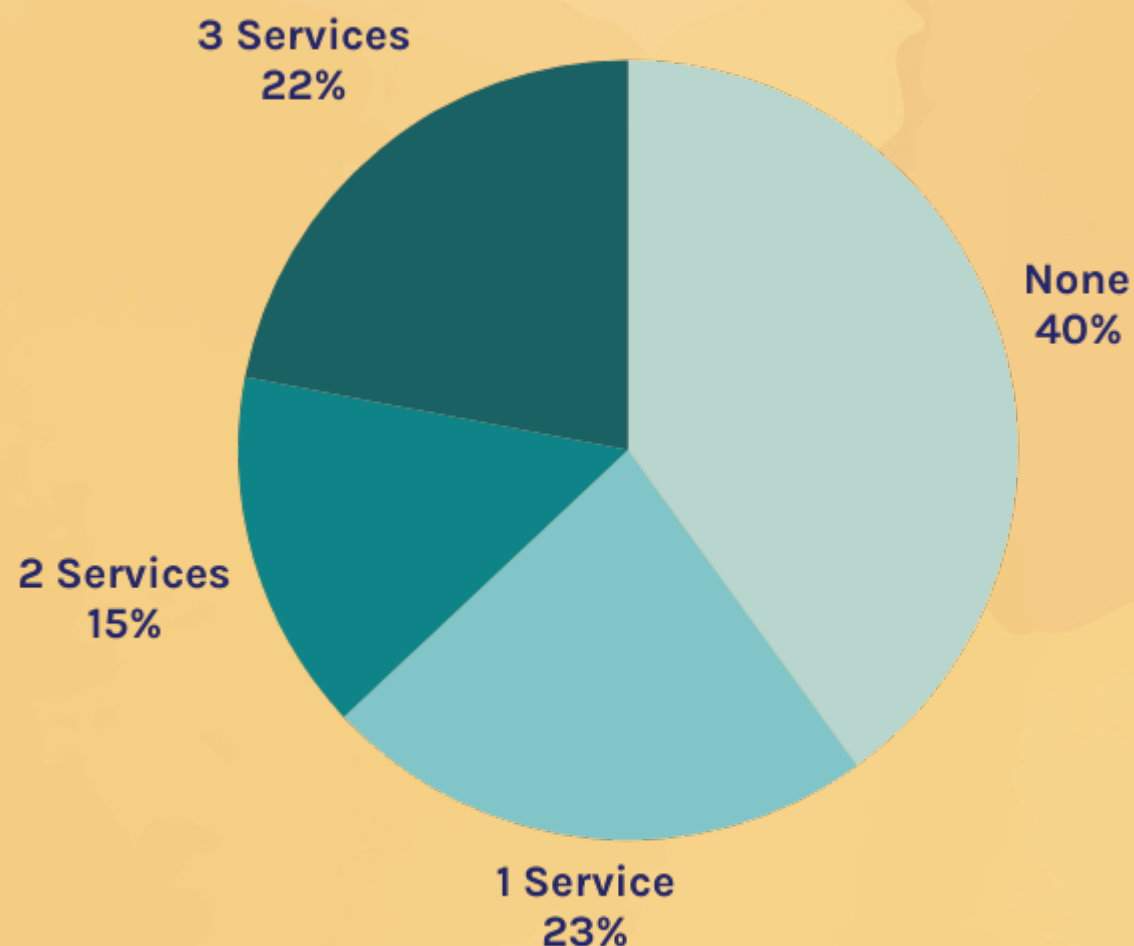| Ranking Establishment-Dense States ||
Top 5	Bottom 5
New York	Mississippi
DC	Montana
New Jersey	Vermont
California	West Virginia
Nevada	Wyoming

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Top 5 Establishment-Dense States

In dense areas, establishments are **more** likely to leverage multiple third-party delivery services.

None 40%
3 Services 22%
2 Services 15%
1 Service 23%

Bottom 5 Establishment-Dense States

In less dense areas, establishments tend to use none or just one third-party delivery service.

3 Services 6%
2 Services 8%
1 Service 20%
None 66%
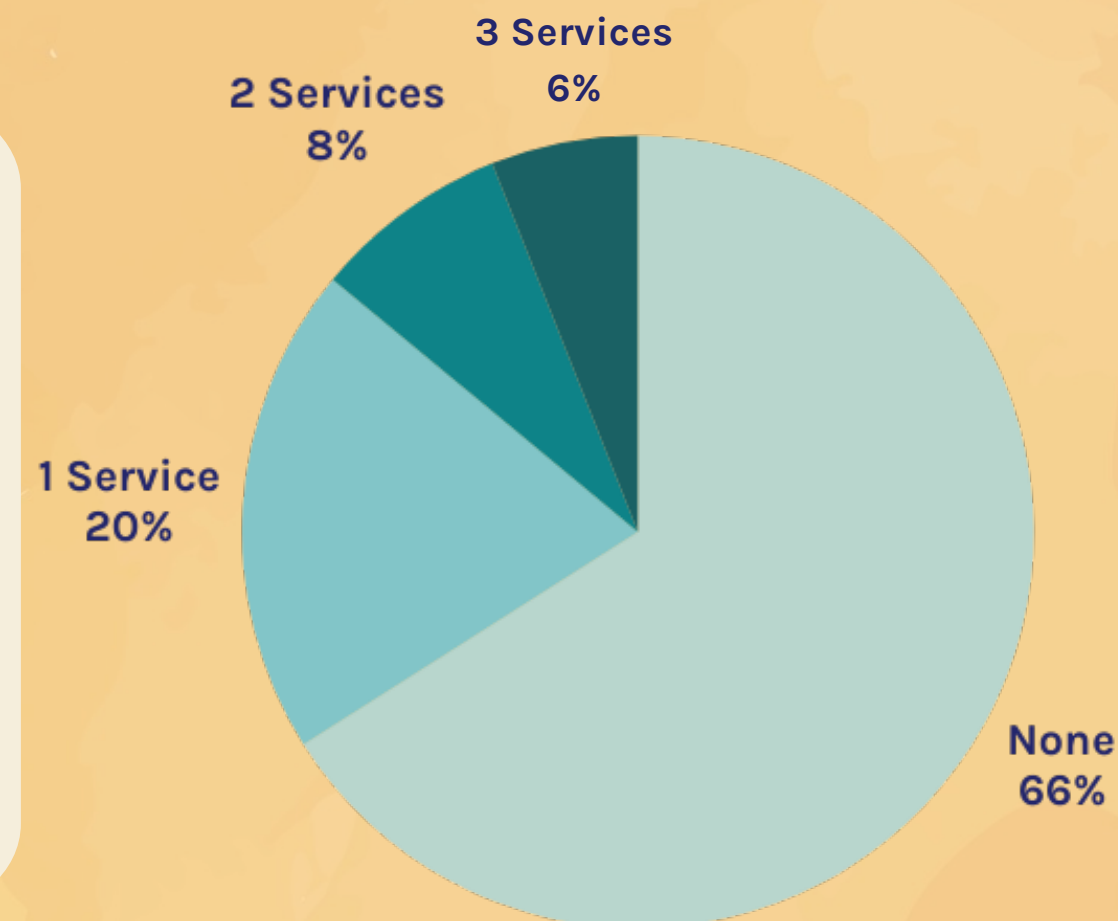
Establishments are more likely to list on multiple third-party delivery services as establishment density increases.
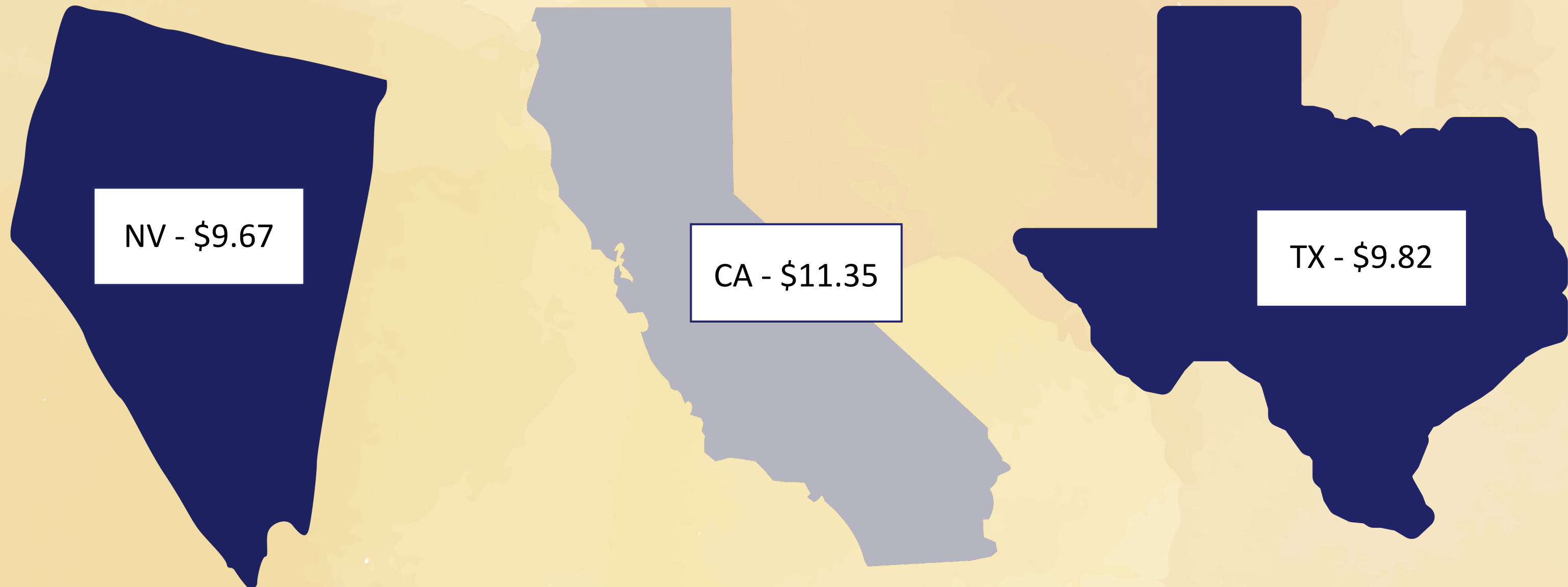
Source: Brizo FoodMetrics, April 2024

Mapping the Cost

Data Analysis in Multiple Dimensions

Average Menu Item Price by State
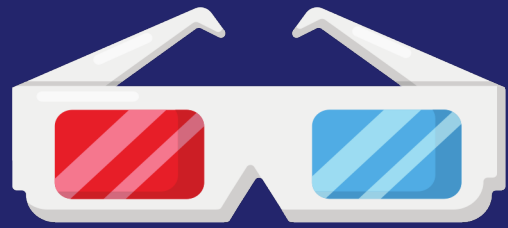
Across Top 3 Third-Party Delivery Services*
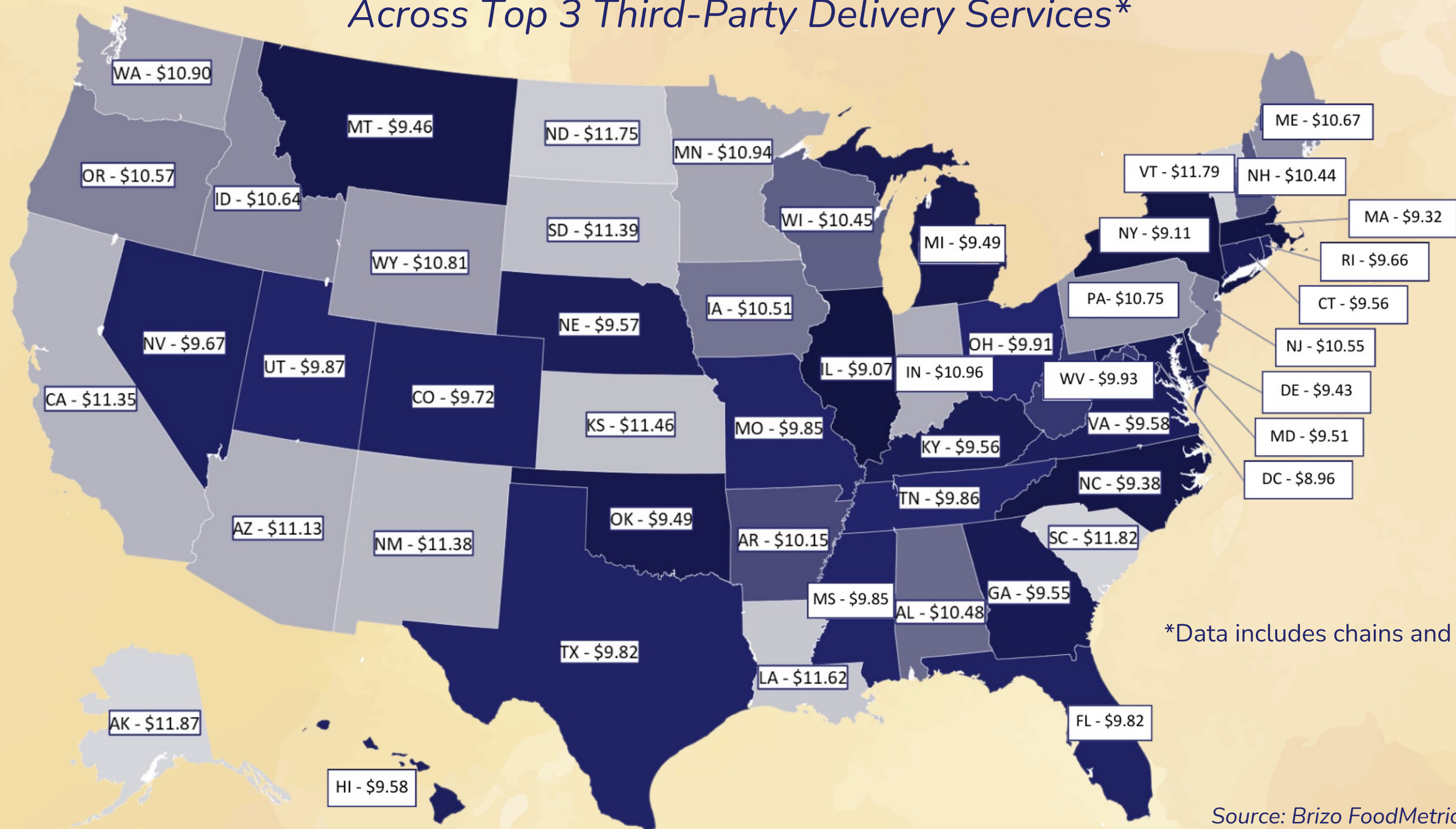
NV - $9.67

CA - $11.35

TX - $9.82

*Data includes chains and independents

Source: Brizo FoodMetrics, April 2024

Average Menu Item Price by State
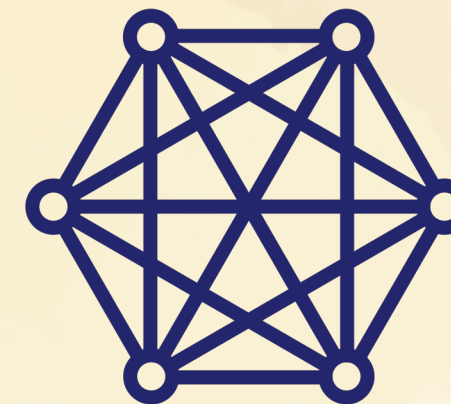
Across Top 3 Third-Party Delivery Services*

WA - $10.90
MT - $9.46
ND - $11.75
MN - $10.94
ME - $10.67
VT - $11.79
NH - $10.44
OR - $10.57
ID - $10.64
WI - $10.45
NY - $9.11
MA - $9.32
SD - $11.39
MI - $9.49
RI - $9.66
WY - $10.81
IA - $10.51
PA- $10.75
CT - $9.56
NE - $9.57
NV - $9.67
OH - $9.91
NJ - $10.55
UT - $9.87
IN - $10.96
WV - $9.93
DE - $9.43
CA - $11.35
CO - $9.72
IL - $9.07
MO - $9.85
KY - $9.56
VA - $9.58
MD - $9.51
KS - $11.46
NC - $9.38
DC - $8.96
TN - $9.86
OK - $9.49
AZ - $11.13
AR - $10.15
SC - $11.82
NM - $11.38
MS - $9.85
GA - $9.55
AL - $10.48
TX - $9.82
LA - $11.62
FL - $9.82
AK - $11.87
HI - $9.58

*Data includes chains and independents

Source: Brizo FoodMetrics, April 2024

Average Menu Item Price Across McDonald's:
How Multi-Service Listings Affect Item Pricing

Density Group 4 *(most dense)*	Weighted Average	1 Service	2 Services	3 Services
		$5.14	$5.37	$4.34

$$$** ➜ **$

Price DECREASES the more services the establishment is listed on

Average Menu Item Price Across McDonald's:
How Multi-Service Listings Affect Price Variance

💡 Price is MOST CONSISTENT across delivery partners when an establishment is listed on all three services

Density Group 4 *(most dense)*		1 Service	2 Services	3 Services
	Weighted Average	**$5.14**	**$5.37**	**$4.34**
	Uber Eats	$4.03	$6.76	$4.32
	DOORDASH	$5.85	$3.59	$4.35
	GRUBHUB	$6.11	$5.63	$4.34

Average Menu Item Price Across McDonald's

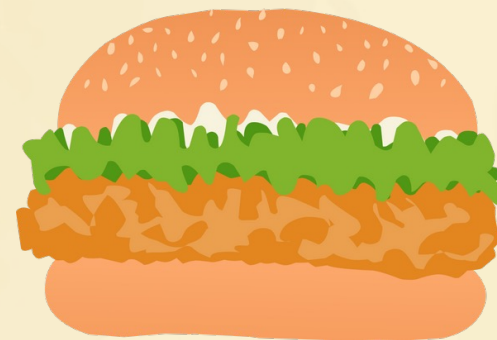✅ These two trends are consistent across ALL McDonald's density groups

		1 Service	2 Services	3 Services
Density Group 4 *(most dense)*	**Weighted Average**	**$5.14**	**$5.37**	**$4.34**
	Uber Eats	$4.03	$6.76	$4.32
	DOORDASH	$5.85	$3.59	$4.35
	GRUBHUB	$6.11	$5.63	$4.34
Density Group 3	**Weighted Average**	**$5.01**	**$5.16**	**$4.18**
	Uber Eats	$4.06	$6.42	$4.16
	DOORDASH	$5.55	$3.53	$4.20
	GRUBHUB	$5.92	$5.48	$4.18
Density Group 2	**Weighted Average**	**$4.94**	**$4.97**	**$4.13**
	Uber Eats	$4.34	$5.89	$4.11
	DOORDASH	$5.18	$3.66	$4.15
	GRUBHUB	$5.83	$5.52	$4.13
Density Group 1 *(least dense)*	**Weighted Average**	**$4.87**	**$4.52**	**$4.11**
	Uber Eats	$4.74	$5.06	$4.09
	DOORDASH	$4.80	$3.84	$4.13
	GRUBHUB	$5.87	$5.31	$4.11

Source: Brizo FoodMetrics, April 2024

Chicken Sandwiches Across Independents:
How Multi-Service Listings Affect Item Pricing

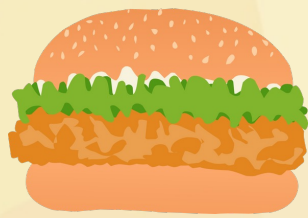**Price INCREASES the more services the establishment is listed on**

(OPPOSITE McDonald's)

Density Group 4 *(most dense)*	Weighted Average	1 Service	2 Services	3 Services
		$12.16	$12.92	$13.20

$ → $$$
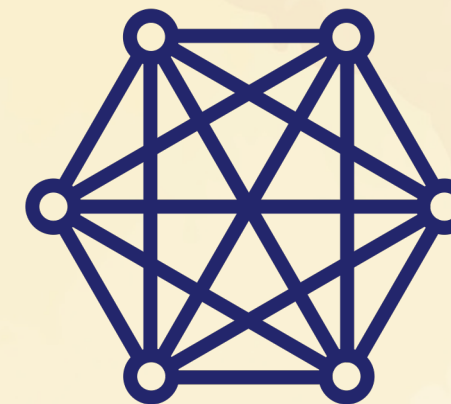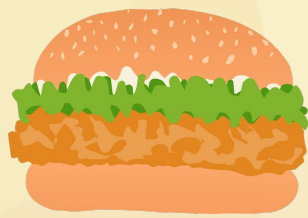
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Chicken Sandwiches Across Independents:
How Multi-Service Listings Affect Price Variance

Price is MOST CONSISTENT across delivery partners when an establishment is listed on all three services

✅

(SAME as McDonald's)

		1 Service	2 Services	3 Services
Density Group 4 *(most dense)*	Weighted Average	$12.16	$12.92	$13.20
	Uber Eats	$12.17	$12.90	$13.21
	DOORDASH	$12.37	$13.07	$13.21
	GRUBHUB	$11.89	$12.78	$13.17

Source: Brizo FoodMetrics, April 2024

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# Chicken Sandwiches Across **Independents**

Independents vs McDonald's:

✅ SAME trend for price variance

⬅️ OPPOSITE trend for item price across multi-listings

		1 Service	2 Services	3 Services
Density Group 4 *(most dense)*	**Weighted Average**	**$12.16**	**$12.92**	**$13.20**
	Uber Eats	$12.17	$12.90	$13.21
	DOORDASH	$12.37	$13.07	$13.21
	GRUBHUB	$11.89	$12.78	$13.17
Density Group 3	**Weighted Average**	**$11.84**	**$12.58**	**$12.82**
	Uber Eats	$11.68	$12.45	$12.80
	DOORDASH	$12.43	$12.80	$12.88
	GRUBHUB	$11.55	$12.49	$12.79
Density Group 2	**Weighted Average**	**$11.71**	**$12.35**	**$12.74**
	Uber Eats	$11.07	$12.13	$12.68
	DOORDASH	$12.49	$12.58	$12.83
	GRUBHUB	$11.56	$12.30	$12.73
Density Group 1 *(least dense)*	**Weighted Average**	**$10.27**	**$11.83**	**$12.12**
	Uber Eats	$8.87	$11.30	$11.90
	DOORDASH	$11.67	$12.07	$12.27
	GRUBHUB	$11.24	$12.18	$12.19

$ → $$$
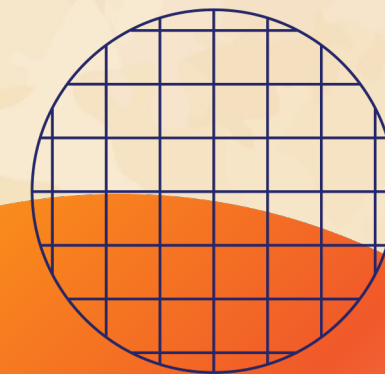
Thank you!

For more tasty insights,
go to **brizodata.com**

For a copy of this presentation,
visit us at **booth #509**

Appendix

Our Data

For the 1.31 million US foodservice establishments analyzed in this presentation, the Brizo FoodMetrics filter criteria are as follows:

Country = US

Business Type = any of the following 15:

- Bakery
- Brewery
- Cafe
- Cafeteria
- Coffee/Tea/Boba Shop
- Delivery Only
- Donut Shop
- Drinking Place
- Eatertainment
- Food Court
- Ice Cream Shop
- Juice Bar
- Mobile Food
- Quick Service
- Restaurant