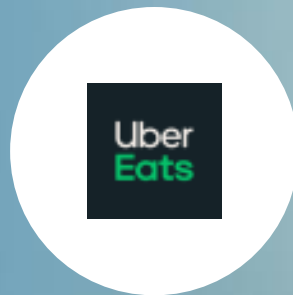


Delivery Aggregators Shopper study

Spring 2025

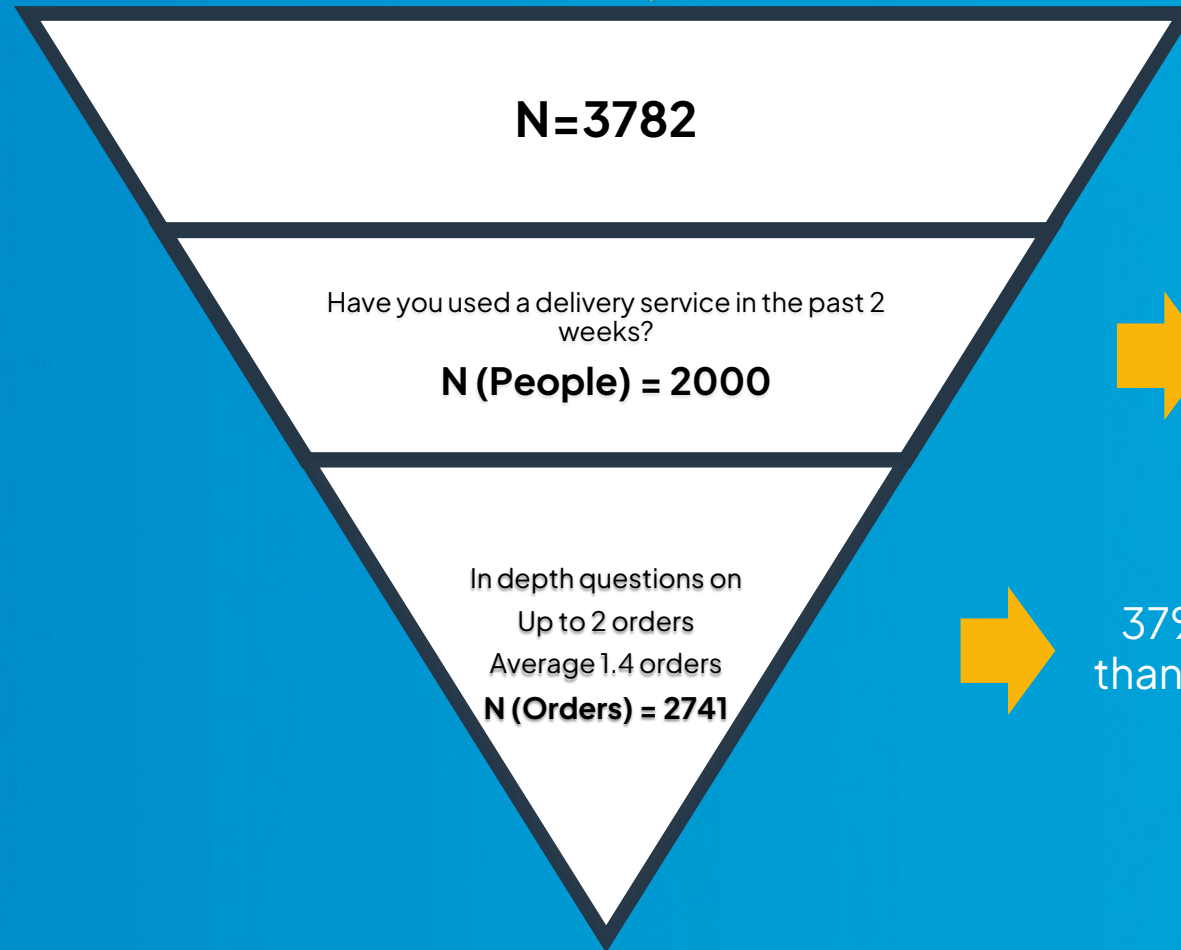


INTRODUCTION

- In May 2024, TWC Group conducted its first foodservice delivery aggregator shopper study.
- 2,000 shoppers who had used Uber Eats, Deliveroo or Just Eat in the previous two weeks participated in a thorough research project to understand views, perceptions and online behaviours when ordering.
- TWC Group is able to run the study again in 2025, using 2024 insights as baseline trends.
- Organisations wanting to participate in the 2025 study will be able to influence the questions posed to shoppers.
- Suppliers are able to ask questions on their specific category
- If you are potentially interesting in participating in the 2025 study, please speak to your contact at TWC Group.

The Sample

Conducted a Quantitative Survey
With a **NAT REP** Start Sample



'Not used' in last 2 weeks left the survey



37% made more than 1 order in last 2 weeks

Fieldwork Period
17th to 23rd May 2024

Contents



Sample & Methodology



Usage and Estimated Market Size



General Orders: Who? How often? When?
Where?



The Aggregators: Main Players



Pricing

General Perspectives – Question Areas

1. Usage penetration

- a) 'Ever used' and
- b) 'Placed order(s) in the last two weeks'

2. Demographics*

- a) Gender
- b) Age
- c) Region
- d) Affluence
- e) Children in household/household make-up
- f) Job industry (working status)
- g) Social media (incl. use)
- h) Ethnicity

3. Purchase specific*

- a) Aggregator used
- b) App/website
- c) 1st time tried
- d) Deliver vs collect
- e) Order type
- f) Reason for choosing aggregator
- g) What ordered (categories purchased)
- h) When ordered (time/day of week)
- i) What occasion
- j) Who ordered for
- k) Where from (retail/food service – named outlets)
- l) Planned/spontaneous
- m) Spontaneous prompt
- n) Extras bought
- o) Bundles bought
- p) Estimated spend
- q) Treat mentality

4. Non-purchase specific*

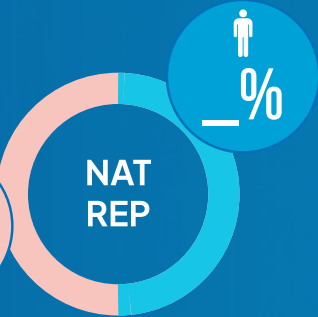
- a) Preferred aggregator (by Channel)
- b) Reasons for preference
- c) How often used
- d) Subscriptions
- e) Users of account
- f) Future intentions
- g) Food delivery news
- h) Food delivery trends

**Respondents who have placed orders with aggregators in last 2 weeks.*

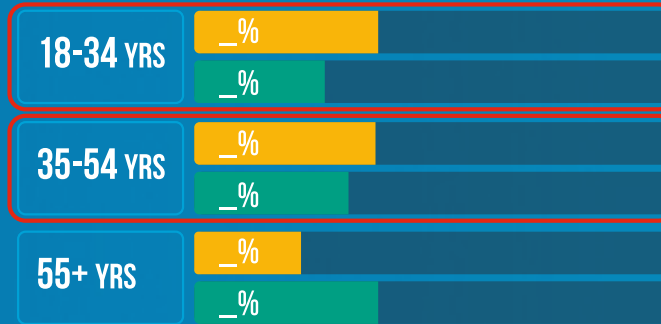
NOTE: Survey tables are shared with Delivery Aggregators Shopper Study.

Who?

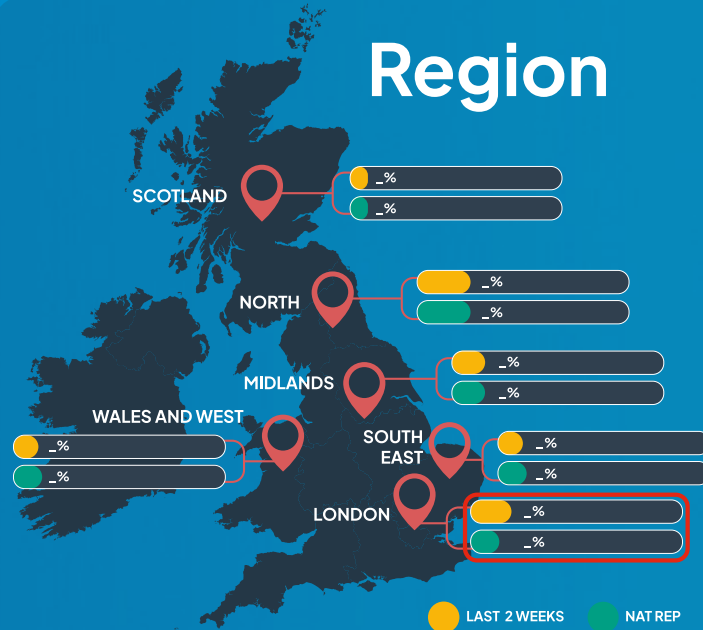
Gender



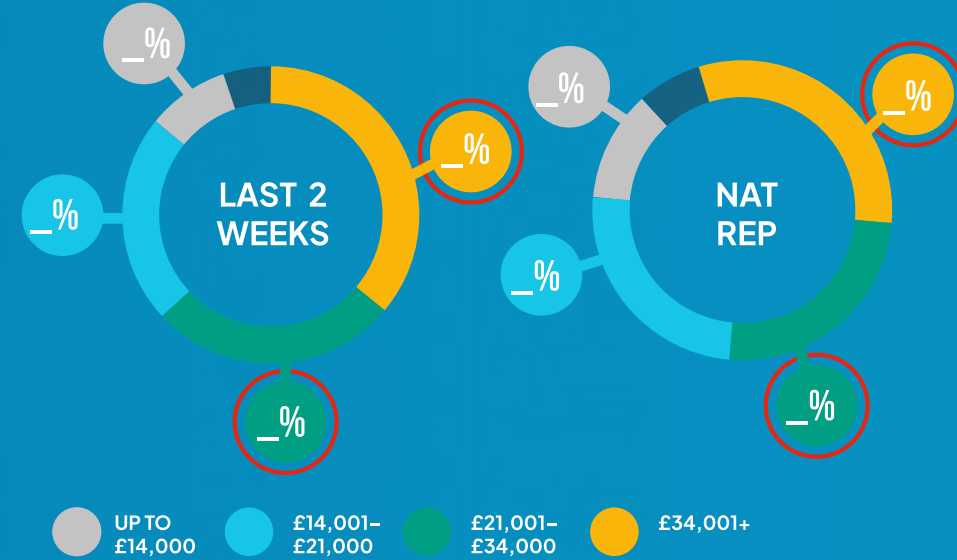
Age



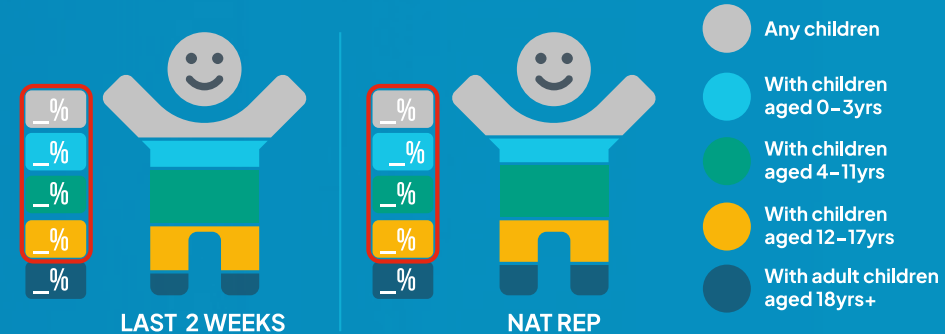
Region



Affluence



With Children



How often, when and how much?

Frequency

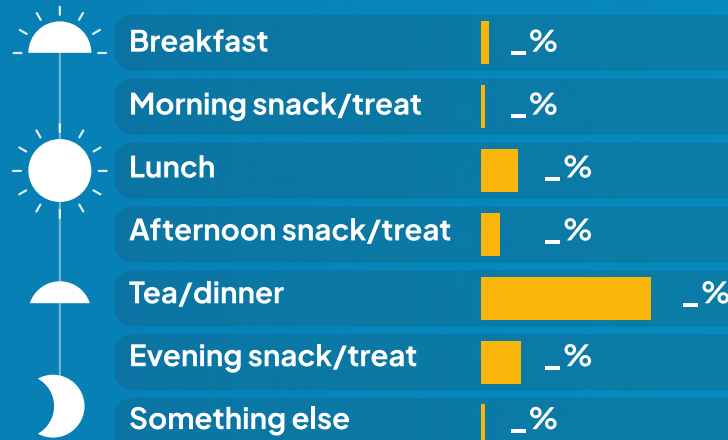


HEAVY USERS > $_ \%$ Weekly
 $_ \%$ Once a Fortnight

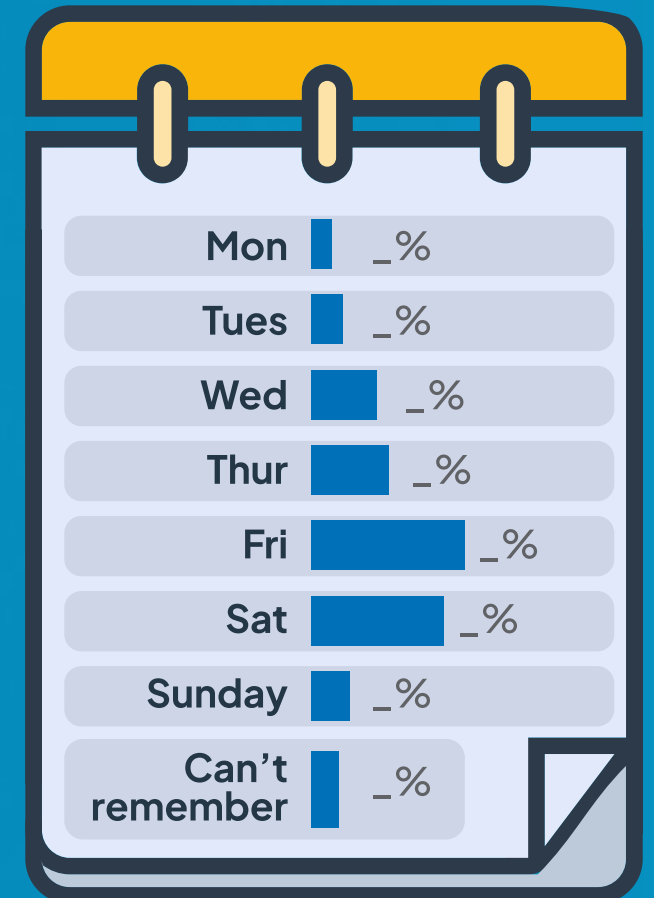
MEDIUM USERS > $_ \%$ Once a Month

LIGHT USERS > $_ \%$ Less Often

Time of the day



Day of the week



Average order value:

£29.65



Average delivery charge paid:

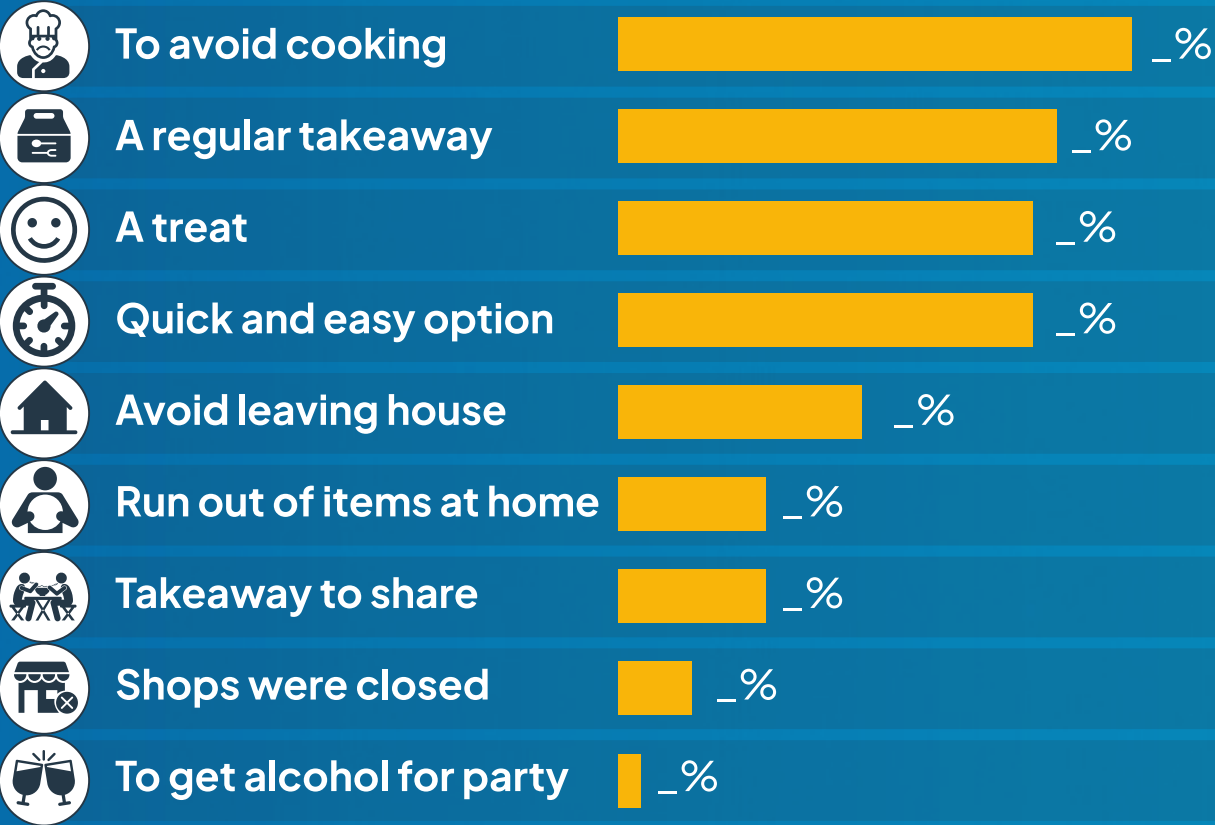
£2.40

$_ \%$ paid no delivery charge

$_ \%$ couldn't remember

Mission

Reason why/Mission



Top 3 categories purchased



Where from?



_ % Fast Food



_ %



_ % Restaurant



_ %



_ % Coffee/
Sandwich Shop



_ %



_ % Supermarket



_ %



_ % Convenience
Store



_ %



Nationwide



Independent



The Aggregators

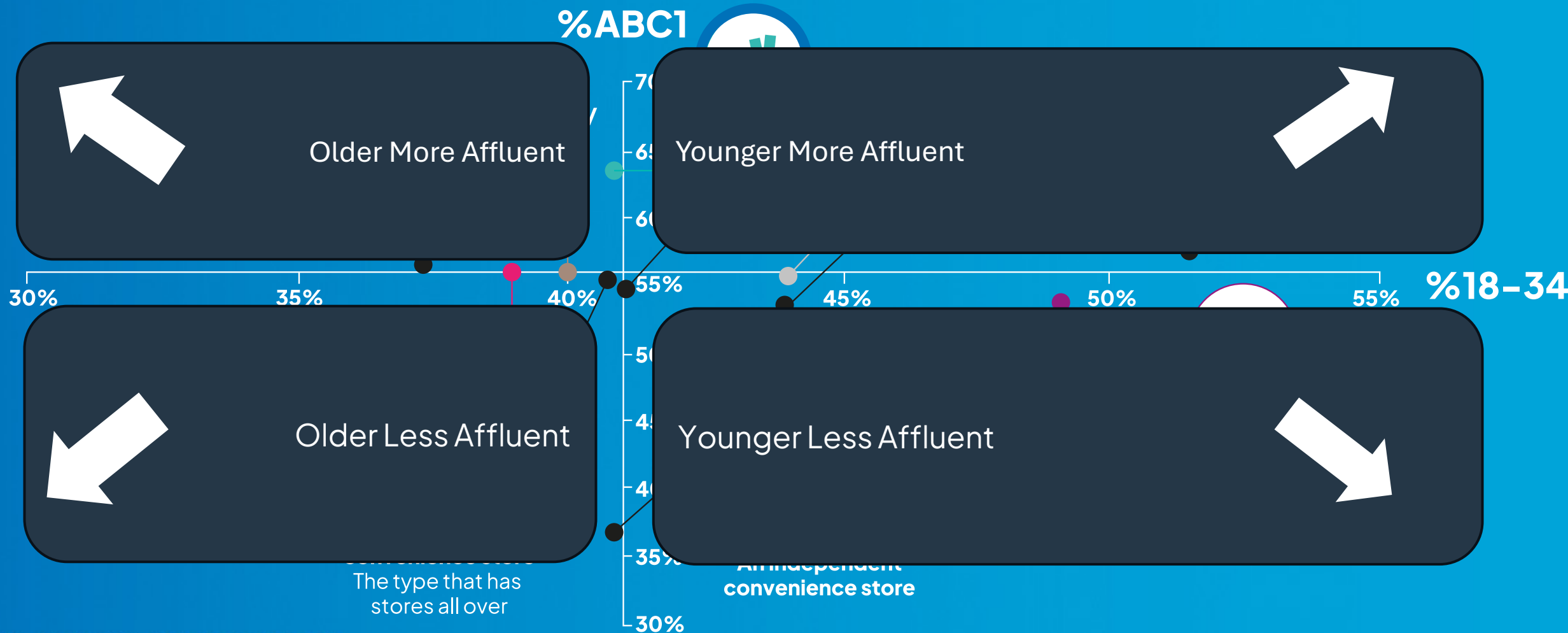


Clear Favourite

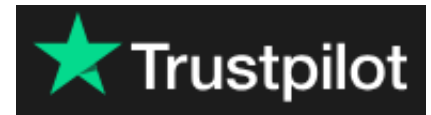
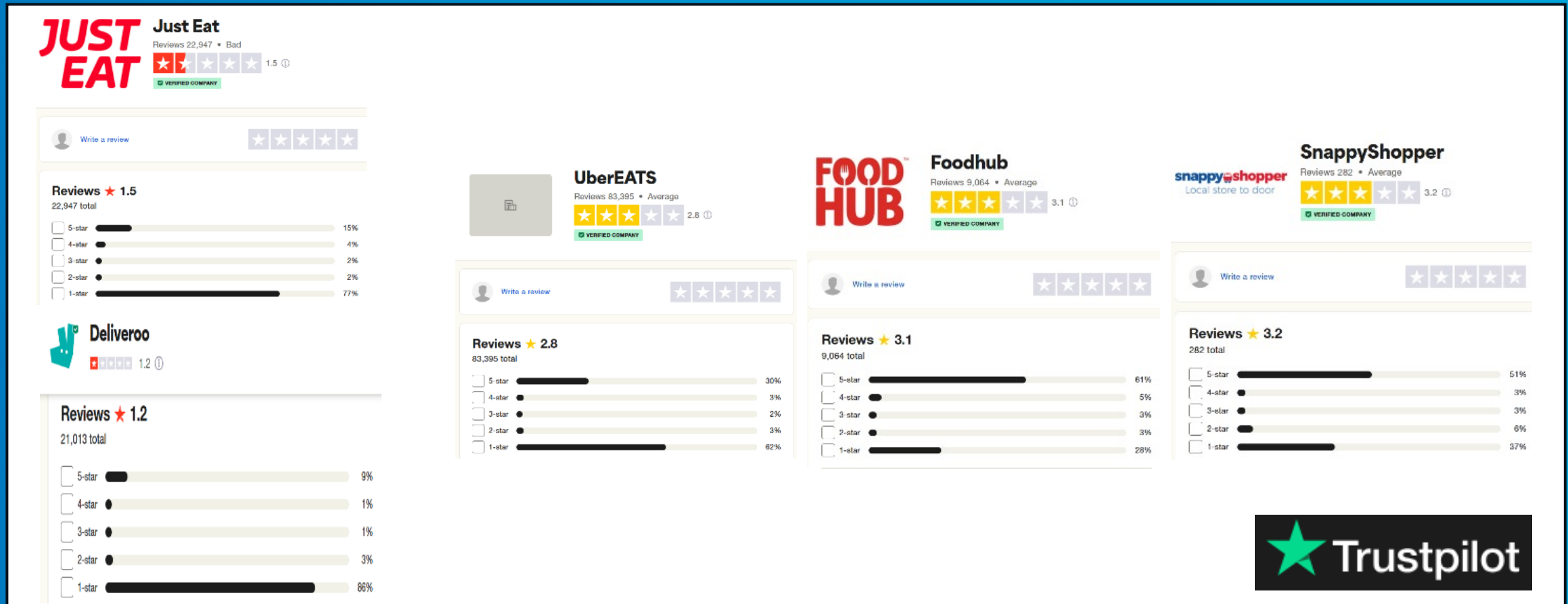


Demographic map

Just Eat has an older profile than Uber Eats and Deliveroo

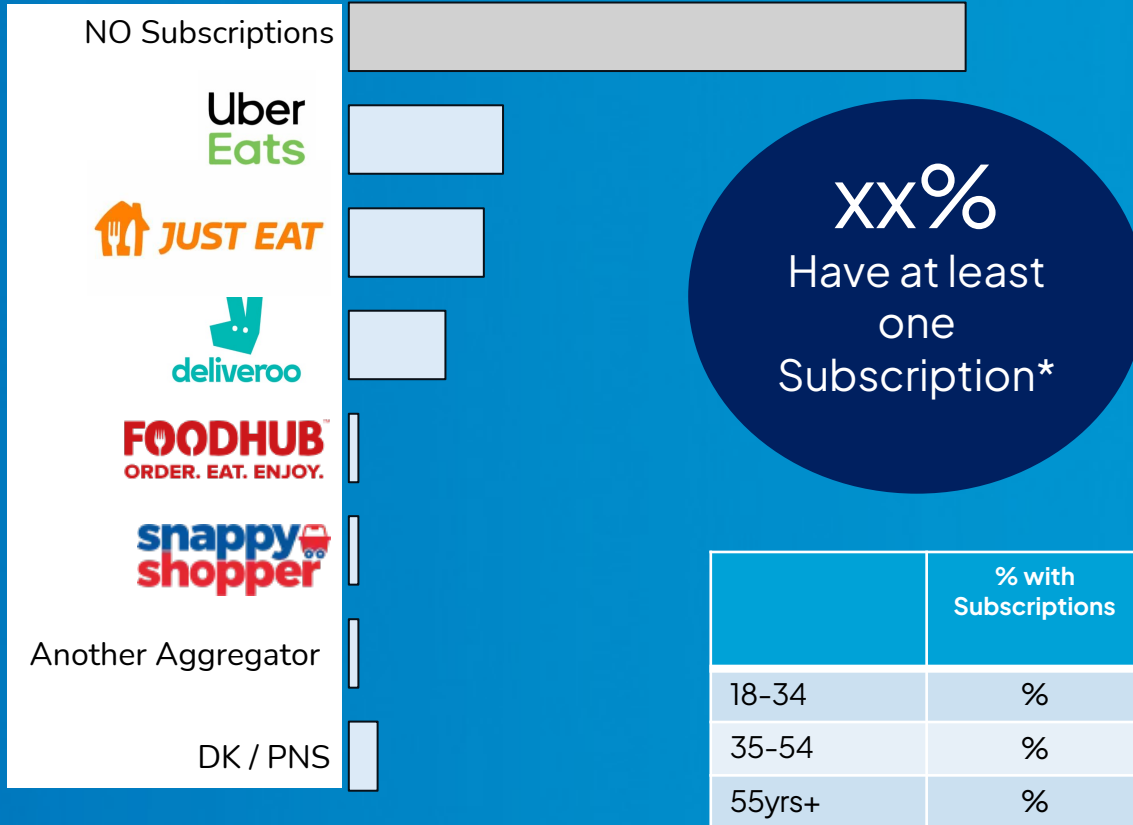


Satisfaction Reviews – smaller players are delivering better reviews

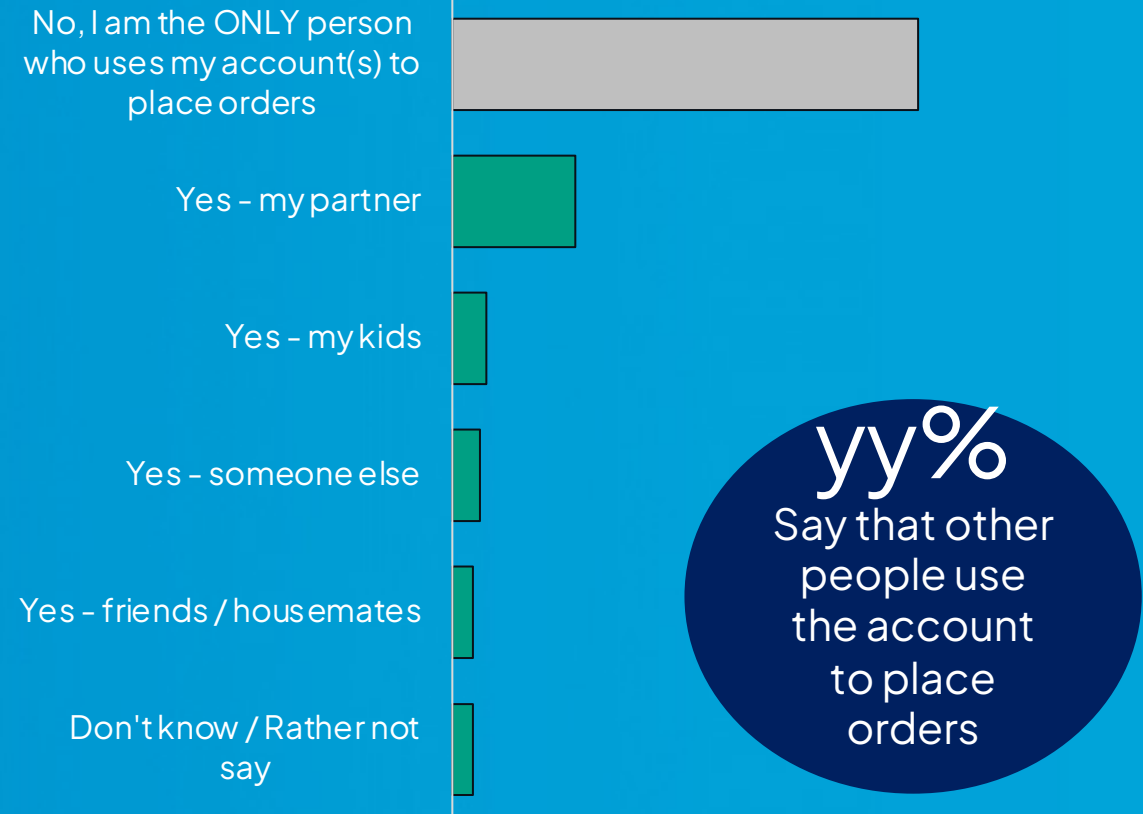


Currently around 1 in 3 have a subscription to any of the Aggregators and 30% say other users order from their account.

Any Subscriptions



Anyone Else Use To Place Orders

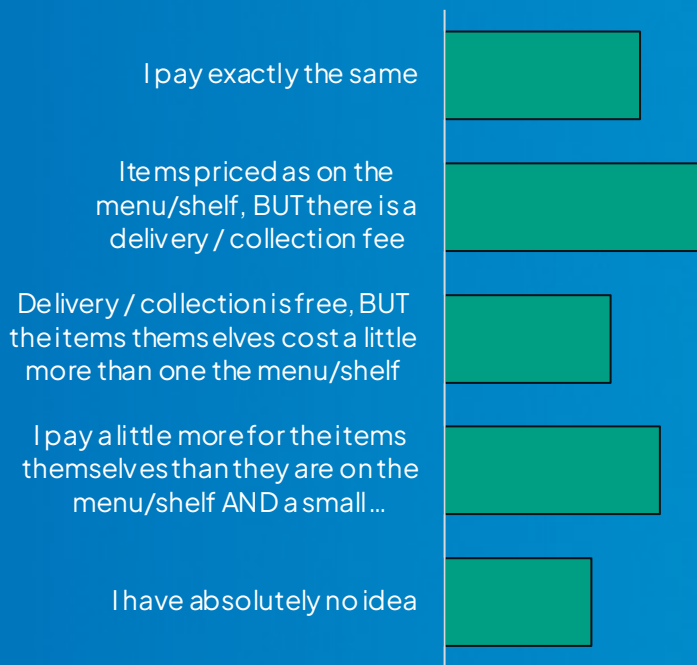


Pricing



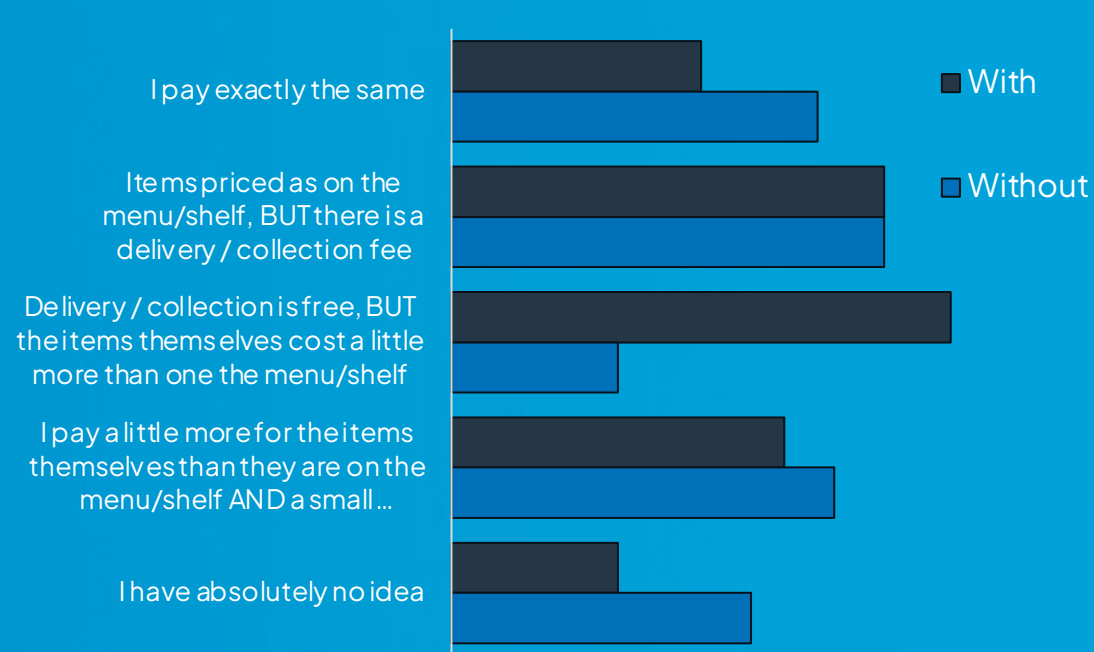
Signs that customers are not altogether clear about how they are being charged.

Perceptions of pricing



Pay for delivery	xx%
Pay more for items	xx%

...those with vs without subscriptions






	With	Without
Pay for delivery	%	%
Pay more for items	%	%

B4: As far as you are aware, are there any additional charges when you place an order with TEXT SUB AGGREGATOR compared to visiting the same shop/restaurant and buying in person? Base: All with a Most Used Aggregator 198 and buying in person? Those with at least one subscription 662 vs without 133.



Significantly high

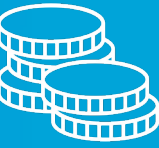
Perceived Pricing Model by Aggregator

				
Total	2000	412	596	1166
I pay exactly the same	%	%	%	%
The items are the same price as on the menu/shelf, BUT, there is a delivery/collection fee	%	%	%	%
Delivery / Collection is free BUT the items themselves cost a little more	%	%	%	%
I pay a little more for the items themselves than what they are on the menu/shelf AND a small delivery/collection fee on top	%	%	%	%
I have absolutely no ideas	%	%	%	%

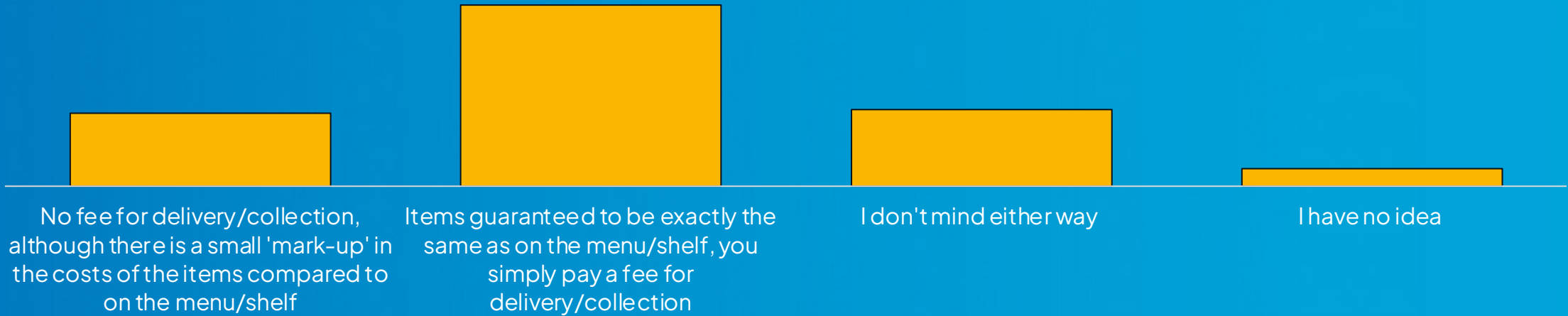
B4: As far as you are aware, are there any additional charges when you place an order with TEXT SUB AGGREGATOR compared to visiting the same shop/restaurant and buying in person?

 Significantly higher than TOTAL

On balance, there is a preference for paying only for delivery / collection with prices otherwise matching the shelf/menu.



Preferred pricing Model



18-34	%	%	%	%
35-54	%	%	%	%
55yrs+	%	%	%	%

B5: If you had to stick with ONE of these delivery services to place all of your orders with, which of the following would you choose?

Statistically significant difference @ 95% confidence

Base: Total Sample 200