



Control, on-demand

The shift to rapid retail delivery



JUST EAT
Takeaway.com

About Just Eat Takeaway.com
www.justeattakeaway.com

Just Eat Takeaway.com is a leading global online food delivery marketplace, connecting consumers with over 362,000 partners in 17 countries. Our mission is to empower everyday convenience.



About PA Consulting
www.paconsulting.com

PA believes in the power of ingenuity to build a positive human future. Our team of around 4,000 strategists, innovators, designers, consultants, digital experts, scientists, engineers, and technologists work across industries and sectors in the UK, US, Ireland, the Nordics, and Netherlands.

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01

Foreword



Guido Fambach
Executive Vice President of Sales
Just Eat Takeaway.com

At Just Eat Takeaway.com, we believe in empowering convenience for everyone – our consumers, partners, and couriers. As a global leader in on-demand delivery, we are constantly evolving to meet the needs of millions across 17 countries.

This commitment drives our latest research, "*Control, on-demand – The shift to rapid retail delivery*", developed with PA Consulting. This report offers crucial insights into the cultural shifts shaping consumer behaviour and highlights clear opportunities for retailers striving to thrive in a world where on-demand services are redefining consumer engagement.

In today's demanding world, consumers are actively seeking ways to optimise their time and simplify their lives. Taking control has become a key aspect of their wellbeing. This research explores how individuals are leveraging on-demand services for self-empowerment. It reveals that seamless, quick solutions for everyday decisions provide significant emotional and psychological benefits, allowing people to regain agency over their time, choices, and lifestyle.

Against this backdrop, the report identifies five key drivers that consumers use to navigate modern life's complexities. We've categorised these as: the new fundamentals; unplugged connection; reclaiming balance; raising the bar; and unleashing the true you.

This is one of the most comprehensive consumer research pieces we have completed on on-demand retail, and its vital role in helping consumers regain control of their busy lives. Retailers and partners can leverage the opportunities uncovered in this work, as consumers increasingly seek more time for what they love, and rely on on-demand services for comfort and calm.

Just Eat Takeaway.com is uniquely positioned to address these evolving needs. We significantly enhanced our offering by rolling out a new unified app experience across our largest markets and expanding our logistics network. We also broadened our product selection to include new categories like pharmacy, beauty, electronics, flowers, and pet care, increasing our total partners to well over 362,000.

We firmly believe in the power of strong retail partnerships to enhance everyday convenience and deliver exactly what our users are looking for. Join us in making on-demand retail a success story for everyone involved.



Frazer Bennett
Chief Innovation Officer
PA Consulting

It's a difficult time for consumers. In a world of polycrises, they wrestle with overlapping financial and societal pressures, alongside the uncertainty of continued technological change – including the rise of AI. We're all rethinking our own individual, and collective, roles in society.

Is it any wonder, then, that we see a continuing shift of expectation among today's consumers? Consumers won't tolerate feeling saturated and over-exposed with the pressures of social media, friends, and work. They're pushing back against the constant expectation to thrive, to compare, to exceed.

Consumers want to take back control.

Our [previous research](#) into on-demand services taught us a lot about the role of new grocery delivery formats on control. Since then, these services have grown in many ways – both in terms of availability and, importantly, the range of products offered.

On-demand isn't just about grocery delivery or fast-food delivery. It's about connection, and deeper human experiences in the real world. It lets us tune into who we really are, enabling spontaneity and prioritising human connections.

Perhaps it's buying a brand-new board game for an impromptu games night. Or a paddling pool to take the edge off a scorching hot day. Or towels for a last-minute trip to the beach. On-demand delivers the ingredients that enable us to take back control. It does this in minutes, and nobody misses out on the party.

Taking back control might not lead to fewer plates spinning, but it will help to keep them in the air. And if a plate drops – maybe you forget to pick up a bag of dog food on your commute – there's the peace of mind that it will be waiting on your doorstep when you get home. This safety net eases anxiety while saving precious time, buying back the 45 minutes it would take to return to the shop.

This paper explores how consumers are taking back control, and the role that on-demand plays in enabling this. We spoke with more than 3,000 consumers and had in-depth discussions with many experts in the area. Our research taught us the impact of this delivery format on enabling the control that consumers crave, and that on-demand is about much more than just saving time. We discovered it can inspire more meaningful in-person relationships, owning 'balance' in our lives, nurturing spontaneity, and being the true version of ourselves.

02

Join us on a quest for control

Navigating today's evolving retail and cultural landscape

The evolving on-demand industry, and where it's heading now

On-demand delivery – delivery of items in under an hour from order – shows no signs of slowing down. Even in the last year it's evolved at rapid speed. In Europe, on-demand grocery orders are predicted to grow by 7% year-on-year (CAGR 2025-2030), resulting in a projected market volume of US \$17.5 billion by 2030. This means 11% of the European population will be using quick grocery services by 2030.¹ It's clear on-demand is here to stay.

In our previous whitepaper, "[The Rapid Evolution](#)", we explored how on-demand grocery delivery was shaping the retail landscape and incrementally growing the consumer basket. We delved into the rise of the on-demand economy and the shifting consumer mindset, one defined by speed, convenience, and seamless access.

And finally, we touched on the next evolution of on-demand delivery, one that will see all manner of items delivered in under an hour – from electronics and baby care items, to pharmacy, flowers, pet care, and sexual wellness products. The future was clear: the high street is in your pocket.

The future we predicted has now arrived. On-demand has evolved one step further. Consumers can now get the entire high street delivered whenever they want, and there is already a growing appetite. In fact, 89% of people who have never used on-demand delivery services said they'd be interested in rapid delivery of a non-food product.² When broken down by key retail categories, on-demand delivery emerges as a powerful enabler with strong potential to play a central role across the entire retail landscape.

¹ Statista (2025) Quick Commerce – Worldwide. Retrieved from: [Statista Quick Commerce](#)

² The Rapid Evolution (2024) – Data reflects UK, DE, NL, ES. Retrieved from: [JET x PA The Rapid Evolution](#)

Consumer appetite for on-demand delivery by retail category:
(% open to ordering for on-demand delivery, across UK, DE, CA)

69%

Baby care

63%

Pharmacy and health

54%

Pet care

50%

Flowers and gifting

46%

Sexual wellness

44%

DIY and gardening

41%

Electronics

39%

Beauty



Boots (UK)



Media Markt (Germany)



Lovehoney

CEX

6,000

Just Eat Takeaway.com has 6,000 retail stores globally on their platform, spanning many retail categories

The Body Shop

Fressnapf
Maxi Zoo

Dollarama

PetSmart

Interflora



Shoppers Drug Mart (Canada)



A changing world; a changing consumer

But the world we are living in has evolved too, with consumers now facing distinct pressures. In the last year, heightened economic uncertainty, political instability, climate anxiety, and the overwhelming pace of technology have created a pressure cooker of psychological challenges.

Consumers across all walks of life are continually navigating stress, fatigue, and overwhelm. The majority (85%) of the general public in the UK, Canada and Germany say that managing stress and preventing overwhelm is important to them right now, with 79% saying they want to live more in-the-moment.

The result? More control over their choices has become a top priority. In fact, 90% of the consumers we spoke to say that increased control over their time, choices, and lifestyle is a key priority for them in 2025, on par with basic needs like financial security, shelter, and mental health.

For many, control has become the new currency of wellbeing, from how they spend their time, manage their emotions, or navigate everyday decisions. We see it in the rise of self-care rituals, the growing emphasis on boundaries, and the demand for services that adapt to real life, in real time. Consumers want retailers to deliver dependably, providing closeness, comfort, and connection in a world where so much is uncertain.

So, what does this mean for retailers, and what role could on-demand delivery play in this new reality?

82%

say that they don't want to be reliant on others, institutions, the government; they want to be able to live a happy, fulfilled life on their own terms.

UK 84% | DE 80% | CA 83%

90%

say that having more control over their choices, time and lifestyle is a top priority for them right now.

UK 89% | DE 89% | CA 93%

“

In today's world, there is a lack of clarity and a heightened sense of confusion. There is a lot of instability and no clear picture or roadmap for what the future holds, giving rise to this unprecedented and unpredictable state of the world.

Taking popular culture as an example, the various types of dreamworlds and fanatics showcased in TV and music highlights the sentiment that no one really knows what the future holds – people don't know what they want. Which is all leading to a large amount of chaos and heightened anxiety. Within this context, consumers are feeling as though they are being stereotyped.

Alfie Spencer

Brand and culture expert, Office of Ideologies



About this report

Just Eat Takeaway.com, in partnership with PA Consulting, will shine a light on the shifting forces shaping modern consumer behaviour, backed by robust insight from consumers and cultural experts.

In this report we take a step back – to understand the role of on-demand delivery, not just as a convenience service, but in relation to the emotional undercurrents driving the needs of today’s consumer, from rising stress levels to the need for control in an increasingly complex world. Within this, we go beyond groceries, exploring the next iteration of on-demand delivery; delivery of electronics, pharmacy, DIY, beauty products, and more, establishing how these on-demand categories can help to facilitate real consumer needs in an incremental way. Crucially, the report explores what this means for retailers and brands looking to stay relevant, resonant, and useful in consumers’ everyday lives.

Methodology

To get to the heart of this shift, we placed humans at the centre:



3,000

We surveyed **3,000** of the general public across the UK, Germany (DE), and Canada (CA) – including 750 ‘Speed Seekers’ – to uncover the broader forces shaping behaviour.

10

We visited the homes of **10** on-demand users in the UK and Germany, to capture real, lived experiences.

3

We spoke with **three** cultural experts – a brand strategist, mental fitness author, and a behavioural scientist – to ground the research in a deeper societal context.

Welcome to Control, on-demand.



Who are the General Public?

To understand today's cultural climate, we need to hear from the full spectrum of society. The general public represents a nationally balanced sample of consumers aged 18–64, spanning generations, life stages, and lifestyles, capturing the mainstream mindset shaping everyday choices.



Who are the Speed Seekers?

To get a glimpse of what's next, we spoke to Speed Seekers, early adopters of on-demand delivery who've ordered products for rapid delivery at least once in the last six months. Their behaviours offer a signal of where things might be heading, giving us a useful lens on how mindsets and expectations could evolve over time.

Who are the experts?



Alfie Spencer is a Partner at a strategy and creative consultancy Office of Ideologies. He builds growth strategies for brands, from product innovation to brand purpose and comms.



Maya Raichoor is a leading visualisation and mental fitness expert and author of 'Visualise'. She delivers keynotes, workshops, and speeches for global companies and brands.



Simona Botti is a behavioural scientist and Professor of Marketing at London Business School. She focuses on consumer behaviour and decision-making, and the psychological processes behind exercising personal control and wellbeing.

03

How consumers want to take back control

Inside the motivations driving today's faster, fluid choices

Modern life doesn't follow a straight line and neither do people's needs. They shift throughout the day, change with life stages, and respond to the emotional demands of the moment. In this fast-paced, high-pressure world, understanding consumers means moving beyond static personas or demographics.

That's where need spaces come in.

Need spaces describe a mindset, rather than a specific person. They capture the emotional and functional priorities that rise to the surface depending on context, whether that's the need to reset, to save time, to feel in control, or simply to get through the day. This mindset-based approach helps us understand how people are feeling and what they need in that moment, regardless of who they are.

For retailers, by understanding and tapping into the motivations that matter, you can tailor services to meet these needs, and resonate better with your audience, building trust and loyalty.



By modelling 25 consumer priorities, we were able to identify five spaces that all seemed to ladder up to a core emotional benefit; taking back control:

Reclaiming balance

Trying to juggle the stresses of everyday life while maintaining balance, amidst the pressure of constant decision-making.



Raising the bar

Carving out the time to learn new skills and develop as a person, striving to gradually become the best version of you.



Unplugged connection

Pushing back against screen-dependency, and instead striving for meaningful real-world connection.



Unleashing the true you

Breaking free from societal norms to pursue the passions that excite, creative ideas and spontaneous, authentic living.

The new fundamentals

Protecting the comforts of home-life and maintaining privacy in an 'always on' world.



How does on-demand delivery fit in?

Good question. In a world that's increasingly chaotic, there isn't one answer that completely fulfils each of these core consumer need spaces. For consumers, it's not about major life overhauls. Small, everyday choices – ones that are attainable, manageable, and on people's own terms – are doing more heavy lifting than ever. A quick delivery, a familiar meal, a shortcut that simplifies the day; these aren't just transactions, they're psychological wins. They help people feel they're regaining a sense of control in a chaotic world.

On-demand delivery is one of these quick wins, providing nuanced, emotionally-driven benefits for consumers – directly or indirectly helping them to take back control in small incremental ways. It's about delivering the meaningful, customer-centric experiences that consumers crave.

77%

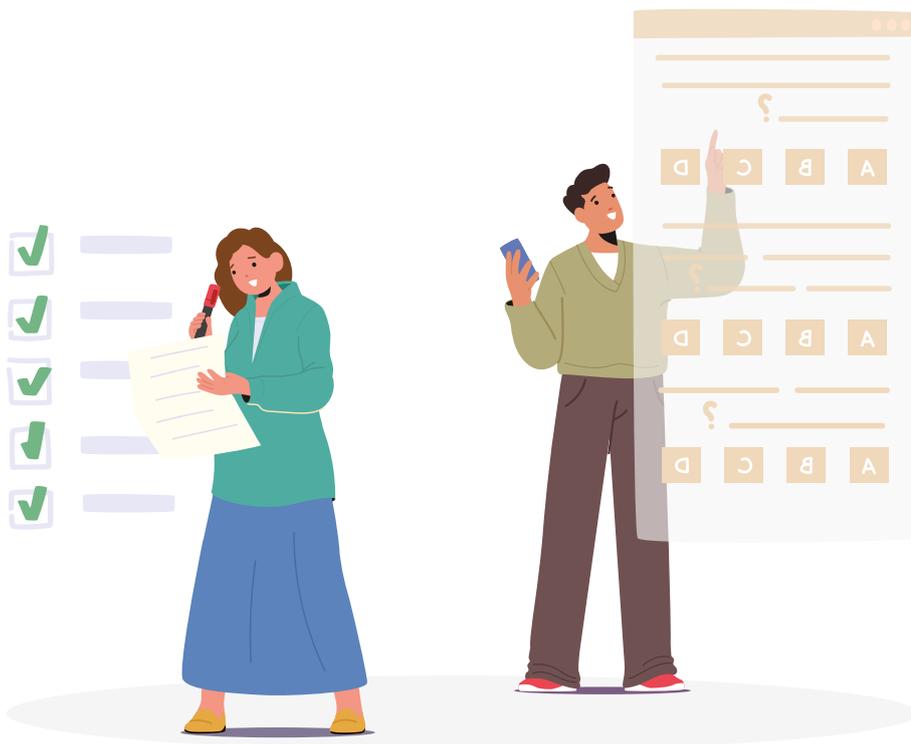
agree “since ‘big wins’ seem harder to come by, I’ve learned to enjoy the small joys in everyday life.”

UK 75% | DE 75% | CA 80%

2 in 3

say “knowing I can get what I need in under an hour, no matter where I am, feels like taking back control in a busy world.”

UK 72% | DE 64% | CA 69%



At a glance: How on-demand delivery can help meet each consumer need space



**Reclaiming balance
+ on-demand baby care**

Between work, caring for elderly parents, and raising a young family, on-demand delivery helps Harry stay on top of baby care essentials – like nappies and formula – right when he needs them.



**Unplugged connection
+ on-demand gifting**

On-demand empowers Katie to stay close to the people she cares about, whether it's flowers for a friend going through a tough time or a last minute birthday gift. It helps her meaningfully keep up with life's milestones.



**Raising the bar
+ on-demand electronics**

When tech breaks, on-demand saves Andy the time and hassle of searching for a replacement, giving him back time to invest in his interests and hobbies.

**The new fundamentals
+ on-demand pharmacy**

Sarika values the privacy and convenience of on-demand delivery, choosing to have personal essentials like pain relief and period care brought directly to her door, avoiding the discomfort of public queues.



**Unleashing the true you
+ on-demand beauty**

Sarah turns to on-demand beauty delivery to express her identity on her own terms – whenever inspiration strikes.



**Tailoring your quest for control:
Determining which needs spaces
are most relevant for your brand**

Our analysis showed that particular retail categories are especially well-suited to meet certain need spaces. This means that, depending on your retail category, two need spaces should be prioritised as most relevant for your brand. For instance, if you're a retailer focused on DIY, then **Raising the bar** and **Unleashing the true you** are key spaces. If you're more aligned to Beauty, then take a look at **Unplugged connection**.

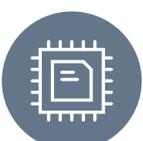
Focusing on these priority need spaces provides more targeted, detailed insights into your consumers' evolving needs, making your consumer strategies more effective as a result.

By understanding these needs, you can design products and services that meet people where they are at, in the moments that matter, meaning purchase needs can be fulfilled as if consumers were in the store. And throughout, we'll show how on-demand delivery is already helping retailers respond with more relevance and ease.

Follow the diagram below to tailor your quest for control...



Which type of retail category are you most aligned to?

I'm a...	Go here first...	Then turn to...
<p>Grocery brand</p> 	<p>The new fundamentals Page 18</p>	<p>Unplugged connection Page 22</p>
<p>Pharmacy/wellness brand</p> 	<p>The new fundamentals Page 18</p>	<p>Unplugged connection Page 22</p>
<p>Flowers/gifting brand</p> 	<p>Unplugged connection Page 22</p>	<p>Reclaiming balance Page 26</p>
<p>Beauty brand</p> 	<p>Unplugged connection Page 22</p>	<p>Unleashing the true you Page 34</p>
<p>Pet care brand</p> 	<p>Reclaiming balance Page 26</p>	<p>The new fundamentals Page 18</p>
<p>Baby care brand</p> 	<p>Reclaiming balance Page 26</p>	<p>Raising the bar Page 30</p>
<p>Electronics brand</p> 	<p>Raising the bar Page 30</p>	<p>Unleashing the true you Page 34</p>
<p>DIY/gardening brand</p> 	<p>Raising the bar Page 30</p>	<p>Unleashing the true you Page 34</p>



04

The new fundamentals

Protecting the comforts of home-life and maintaining privacy in an always-on world

Key verticals



Pharmacy



Grocery

Other relevant verticals



Pet care



Baby care



DIY/gardening

“

Wellness is pushing the world away and allowing your mind to expand into this space of privacy where you're not being surveilled... I genuinely believe there's going to be a moment where young people start saying I refuse. I refuse to compete. A market will emerge that says 'this is about you, this is not about anyone else'.

Alfie Spencer

Brand and culture expert, Office of Ideologies

“

We're delighted to partner with Just Eat Takeaway.com to bring our range of health and beauty products to customers in a fast, flexible, and convenient way, wherever they are. It will be super handy for times when you need something urgently but can't leave the house, like if you're feeling unwell or are looking after your kids. Our online business continues to grow and partnerships with platforms like Just Eat enable our customers a way to access our products quickly and easily.

Paula Bobbett

Chief Digital Officer, Boots

The new fundamentals

The new fundamentals reflects our shifting core needs. In a world that feels faster, louder, and more performative than ever, people are looking for ways to protect their peace and privacy and step away from expectation.

Everyday moments are more visible – captured, shared, and judged. Privacy, once taken for granted, now feels like a rarity.

People are reassessing what’s worth their time and energy. A significant portion of the general public (84%) say they are craving moments to themselves, moments that are private and just for them, while 80% tell us they find comfort and stability in being at home. In this context, home becomes more than a space, it becomes a sanctuary.

This isn’t about retreating from life, it’s a conscious shift toward self-preservation. With so much uncertainty in the world, our home is now the one place where what we do is ours and no one else’s, where we don’t always have to be ‘on’.

82%

say their home is where they feel most at ease and connected with themselves.

UK 82% | DE 79% | CA 84%

2 in 3

are looking for more privacy in a world where everything is connected and shared.

UK 65% | DE 62% | CA 66%

Consumer story: Sarika

Sarika is a corporate solicitor with days packed with meetings, workouts, family WhatsApps, and eating vaguely healthily between calls. She’s also a daughter, a partner, a friend. Whether watching EastEnders, a sheet mask and trackies, journaling with a glass of wine, or a game of Articulate with her boyfriend, home is her place, where she can be.

“Home plays a huge role in my life. It’s a safe space where I can truly be myself. No one is going to see me or judge me here! I can do what I want and be who I want.”



All consumer stories are anonymised, reflect true attitudes and behaviours and the full spectrum of people we spoke to

How on-demand delivery facilitates the new fundamentals

Staying in our 'protected' space isn't easy. Life happens. Needs arise and not all of them we want to broadcast.

On-demand can play a quiet but powerful role, bringing essentials straight to the door quickly, discreetly and on the consumer's terms, maintaining peace. It unlocks anonymous access to products people may feel awkward or embarrassed buying in-person, meeting needs with minimal friction, and maximum dignity. For those with accessibility challenges, health issues or caregivers, it removes the mental and physical barriers that come with leaving the house; 82% of Speed Seekers say on-demand delivery will make it easier to access things they need, especially when they can't leave home.

This isn't just convenience – 70% of the general public say on-demand will help make staying at home more enjoyable, giving them control, privacy, and comfort, all of which now feel more essential than ever.



Pharmacy spotlight

Discretion and timing are critical in this category. From pain relief to period care and sexual wellness, shoppers want privacy and speed, not queues and awkward encounters. On-demand gives retailers a way to meet these needs head-on. It removes barriers, adds value in urgent moments, and turns essentials into loyalty-building lifelines. For retailers, it's not just about convenience, it's about being there when others can't.

68,000

pregnancy tests sold over the last 12 months on Just Eat Takeaway.com.

72%

of Speed Seekers say on-demand will give them more privacy and discretion in ordering the items they need. (e.g. pharmacy, self-care etc.)



Grocery spotlight

There is an opportunity for retailers to bring more comfort and ease. Whether it's topping-up ingredients mid-recipe, grabbing a missing item, or adding a treat to a night in, these are extra moments that traditional grocery trips often miss. On-demand adds a layer of flexibility that fits around homelife, unlocking incremental, unplanned spending, meeting everyday needs as they arise – bringing comfort and peace to consumers' everyday homelife.

3,000

In the UK alone, Just Eat Takeaway.com sell over 3k boxes of tea every week.

74%

of Speed Seekers say on-demand gives them an additional way to shop with their favourite retailers³.



05

Unplugged connection

Reconnecting with people and moments that matter in an age of distraction

Key verticals



Flowers/gifting



Grocery

Other relevant verticals



Beauty



Pharmacy

“

The partnership with Lieferando Austria is literally opening up new paths to our customers. Thanks to the already established infrastructure, our floral bouquets now reach our customers' vases even more conveniently and quickly straight from our florists.

Marco Ansaldi

Managing Director, Fleurop Austria

“

The collaboration between The Body Shop and Lieferando allows us to bring our high-quality, ethically produced products directly to customers' homes, combining convenience with our commitment to sustainability and cruelty-free beauty. This partnership is a great opportunity to reach more people who value conscious shopping without compromising on quality.

Anita Camaiani

Managing Director, Body Shop

Unplugged connection

Unplugged connection reflects a growing desire for real-life closeness in a world that often feels digitally distant. It's less about logging-off and more about tuning-in – finding moments that feel more grounded, human and in the now.

In a world of constant digital noise, people are craving something more grounded. Unplugged connection isn't about rejecting tech – it's about using it more intentionally to create real-life moments that feel present and shared.

Connection is everywhere, but it doesn't always feel close. Screens link us but flatten intimacy – turning relationships into notifications and fleeting messages. Half of the public say they feel disconnected from what really matters. With average screen time nearing seven hours⁴ a day, many

are questioning not just how much they're connected, but *how meaningfully*.

Instead of defaulting to passive scrolling or endless messaging, more are carving out space for presence – choosing shared experiences over shared content. And tech can be part of that too. Whether it's ordering snacks for movie night, gathering friends for a PlayStation session, or sending a treat to someone you miss, technology – when used with intention – can enable real-world connection. These moments don't have to be big, just real and with true meaning.

81%

say small thoughtful gestures help them feel connected to the people they care about.

UK 83% | DE 76% | CA 85%

76%

say more and more, they are valuing real-life experiences and things in a world where we spend so much time online.

UK 76% | DE 76% | CA 78%



Consumer story: Katie

Katie needs connection more than ever. Navigating a tough break-up and living far from her family's Cornish home, she's learned that digital connection can fall short. Now in London, she's found new ways to feel close from afar – like painting personal watercolours for her friends, for example a martini glass after a night out, and mailing them direct to her loved ones. These small creative gestures help her stay more present and spark deeper connection.

“I like to make a little bit more of an effort and give people thought; I want them to feel seen and acknowledged with my paintings.”



All consumer stories are anonymised, reflect true attitudes and behaviours and the full spectrum of people we spoke to

How on-demand delivery facilitates unplugged connection

When connection starts to feel like another notification, people are seeking something more tangible. A chance to show they care, not just say it.

On-demand creates opportunities to transform a passing thought into a meaningful gesture. Whether sending flowers, a last-minute gift, or a spontaneous care package to someone going through a rough time, on-demand connects in ways that go beyond a message or a like.

By bringing ease and immediacy to real-world acts of care, on-demand helps people show up for each other in more personal, present ways. Three quarters (75%) of Speed Seekers say on-demand delivery frees them up to be more present with people in-the-moment.



Flower/gifting spotlight

This is a category where delivery isn't just about speed, it's about sentiment. Whether it's a forgotten birthday, or a spur-of-the-moment gesture, on-demand makes it easier to act in the moment and, for retailers, turning sentiment into sales. In fact 67% of Speed Seekers say they are likely to spend more on flowers/gifting if they can get it rapidly delivered. With loved ones living far apart, demand is growing for thoughtful ways to stay connected-right when it's needed. For retailers, on-demand isn't just a delivery option, it's a way to unlock new, incremental occasions and drive gifting frequency beyond big events.

500,000+

Over the last 12 months, Just Eat Takeaway.com have sold over half a million roses on the platform.

69%

of Speed Seekers say on-demand delivery makes small gestures effortless, helping them stay connected to loved ones, even from a distance.



Grocery spotlight

Grocery is a category rooted in community and plays a central role in how people come together. On-demand delivery brings flexibility to these moments, allowing people to top-up in real time – without leaving the moment. From ordering drinks for last-minute hosting or snacks for a night-in with friends, it's about elevating a shared moment and enhancing the opportunity for real connection, not just convenience. For retailers, this is a chance to meet customers where grocery really lives: not just in the aisle, but in their lives. Being part of these occasions builds emotional relevance, turning a simple delivery into something more meaningful.

5,000

On average, Just Eat Takeaway.com sells over 5,000 packs of beer and bottles of wine everyday in the UK.

2 in 3

of consumers say they are likely to order groceries for on-demand delivery in the next 12 months.



06

Reclaiming balance

A clearer path through daily decisions and mental clutter

Key verticals



Baby care



Pet care



DIY/gardening

Other relevant verticals



Grocery



Flowers/gifting

“

When we're faced with too many choices, we can end up with decision paralysis, anxiety, or regret. There's a trend toward focusing our cognitive energy on the decisions that really matter, and letting others, like brands or technology, handle the rest.

Prof. Simona Botti

Behavioural scientist, London Business School

“

Partnering with Just Eat Takeaway.com to enable rapid delivery across Europe allows us to support pet parents in managing their busy lives more effectively – bringing joy to their pets and delivering exceptional convenience through innovative and fast delivery options that meet customers where they are.

Sven Sommer

Head of Omnichannel, Fressnapf Maxi Zoo

Reclaiming balance

Reclaiming balance is about finding rhythm again. With too much to juggle and not enough headspace, people feel overstretched and underequipped, seeking everyday support to lighten the load and bring more order, energy, and ease.

Every day brings more demands on our time and attention. Technology has made life more accessible, but the constant processing of information, opinions, and expectations is taking its toll. Focus is shrinking, to-do lists are growing and many feel they're falling quietly behind. Half of the general public say their attention spans now are shorter as they constantly flip from one thing to the next.

The mental load is constant - invisible, but heavy. Over half of the general public say they are struggling with burnout, overwhelm or being mentally overloaded. People are seeking ways to reclaim control, energy and focus. Whether through tools, routines, support systems or small moments of ease, the goal is the same: to feel balanced, capable, and back in the driver's seat.

3 in 5

say life feels so busy, it's become a constant juggling act to stay on top of everything.

UK 61% | DE 50% | CA 63%

82%

say it's important right now to feel confident and empowered to make the decisions that are right for them.

UK 84% | DE 76% | CA 87%



Consumer story: Alex

Alex is 50 and feeling the mid-life squeeze, balancing a demanding tech career, supporting elderly parents in Portugal, and managing mental health challenges at home. Political, financial and economic uncertainty only add to the pressure. With so much on his plate, Alex focuses on routine to stay in control. In the rare moments he has to himself, he turns to his vinyl collection, letting music offer a brief escape from the mayhem of life and reclaim a small part of his day.

“A lot of the decisions lie with me, but that’s also a great responsibility on me to make sure that everyone is looked after.”



All consumer stories are anonymised, reflect true attitudes and behaviours and the full spectrum of people we spoke to

How on-demand delivery facilitates reclaiming balance

When life feels overloaded, small wins make a big difference. Just under three quarters (73%) of Speed Seekers say on-demand frees up some of the mental load of their never-ending to-do list, giving their life more balance.

It's a convenient way to keep things moving, skipping the need for planning or making another trip out of the house when you've got a million other things to do. Whether it's picking up a forgotten item or sorting a last-minute errand, on-demand frees up time and headspace, helping people feel more in control, even on the busiest days.

Three quarters (76%) of Speed Seekers say on-demand gives them an option to press pause and indulge in a quick self-care moment, even on the most overwhelming days.



Baby care spotlight

Stakes feel higher in this category. When looking after a baby, even the smallest task can feel like a lot and running out of essentials isn't just inconvenient, it's stressful. On-demand steps in with practical support, helping parents manage the load when everything feels like a lot. For retailers, being there in these high-pressure, high-emotion moments builds trust. Showing up when it counts and becoming the go-to for care, reliability and peace of mind.

900

On average, Just Eat Takeaway.com sell 900 packets of diapers every day worldwide.

1 in 2

parents say they feel panicked, guilty or frustrated if they can't get essentials for their baby when they need them most.



Pet care spotlight

Caring for a pet is a constant commitment that brings joy, but also pressure. When something runs out or slips the mind, it can quickly lead to stress. On-demand steps in as a quiet helper, making it easy to top up essentials like food, treats, medication or grooming exactly when needed. For retailers, it's a chance to become part of that trusted routine, with one more way to show up for our animals that mean so much.

1.8million

In the last 12 months, Just Eat Takeaway.com delivered 1.8m pet care orders.

65%

of pet owners say they've felt guilty when they have ran out of their pet's favourite food or treats when they needed it most.



07

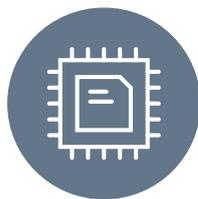
Raising the bar

Investing in personal growth while managing competing demands

Key verticals



DIY/gardening



Electronics

Other relevant verticals



Baby care



Grocery

“

We need to feel like we're working towards something. If you look at the world we're living in, we're going so fast, we need to upskill. We need to change the way we interact with people and technology. We don't want to be left behind. We need to ask ourselves, what actually does it mean to become the best version of me.

Maya Raichoora
Author and speaker

“

Technology is an integral part of our everyday lives – a fact we're most aware of when faced with unexpected failures, dead batteries, or missing equipment. With quick commerce and instant delivery, we're here to support you in exactly those moments.

Tim Laufenberg
E-commerce Managing Director, MediamarktSaturn

Raising the bar

Raising the bar reflects our aspirations for the future – prioritising learning, setting tangible goals, and investing in our own personal growth. It’s finding time, amongst the daily grind, to gradually become a better version of ourselves.

In today’s fast-paced world, life can feel like an endless cycle of routines - wake up, prep meals, work, manage family and chores, run errands, make dinner, sleep... And repeat. Two thirds of people wish they had more time to focus on the things that bring them enjoyment and growth, focusing on what truly enriches them – not just to escape the daily grind, but to thrive.

Meanwhile, social media and perfection culture highlight those who seem to have it all figured out, intensifying the pressure to keep up.

Nearly two-thirds of the general public admit seeing others succeed can make them feel like they’re not doing enough with their own lives.

This isn’t about competition, it’s about regaining a sense of control over the future and investing in long-term fulfilment. From using AI to offload mundane tasks, trying new hobbies, diving into a bestseller, hitting the gym or learning a language on the go, people are finding ways to carve out even 30 minutes for themselves. With the right tools and mindset, everyone can take small but meaningful steps, fueling a rising trend of everyday empowerment.

79%

say trying new things and developing new skills is a top priority in their life right now.

UK 78% | DE 73% | CA 86%

81%

say personal growth and becoming a better version of themselves is important to them right now.

UK 82% | DE 72% | CA 88%



Consumer story: Andy

Andy is driven. Working in a fast-paced consultancy, he prioritises time for friends, exercise and learning. Growth matters and he’s intentional with his time. A recent trip to Japan left a real impression. He’s committed to learning the language, a step towards his goal of living there. It’s not easy to fit in, but for Andy, self-growth is non-negotiable.

“I think that upskilling and spending your time correctly is something that people need to do. I’m reading a book all about that - how to prioritise and realise what matters to you as an individual.”



All consumer stories are anonymised, reflect true attitudes and behaviours and the full spectrum of people we spoke to

How on-demand delivery facilitates raising the bar

Time is limited and daily demands often push personal development aside. On-demand delivery can help bridge the gap.

While it may not deliver self-enrichment products directly, it frees up valuable time and reduces disruption. With items arriving in as little as 30 minutes, on-demand saves mental space for activities that bring lasting fulfilment. For Speed Seekers, it already saves at least 30 minutes for the activities that matter most.

When asked how they would spend this extra time, over three-quarters of the general public said they'd dedicate it to 'me-time,' including hobbies and personal projects. Over three quarters of Speed Seekers say that getting what they need in under an hour feels like taking back control in a busy world.



DIY/gardening spotlight

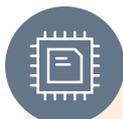
DIY and gardening offer more than just practical outcomes, they're outlets for focus, creativity, and calm. But that sense of flow can be broken by something as small as a missing tool or forgotten material. On-demand delivery helps people stay in the zone. Whether it's compost, paint brushes, or a last-minute fix, fast access to essentials keeps projects moving. For retailers, it's a chance to support these mindful moments and be the go-to for getting things done.

+ 1 million

annual searches for DIY items on the Just Eat Takeaway.com platform including nail, glue, tape, bulb, and paint.

79%

of DIYers are open to buying DIY products and supplies via on-demand.



Electronics spotlight

In this category small, unexpected breakages can quickly turn into time-consuming disruptions. Imagine your game console suddenly breaks - figuring out what's wrong, whether it's fixable and how to replace it all takes valuable time and energy. That time saved with on-demand could be spent heading to a fitness class, or planning your next big trip. For retailers, it's a way to meet needs in the moment and turn everyday disruptions into quick wins.

40

In an exclusive activation with MediaMarkt in Berlin, Just Eat Takeaway.com sold over 40 Nintendo Switch 2 consoles in under two hours.

1 in 2

have needed tech urgently (e.g. headphones, power bank) when about to travel or on a trip.



08

Unleashing the true you

Breaking free of expectation
and pursuing spontaneous,
authentic living

Key verticals



Beauty



DIY/gardening



Health/sexual
wellness

Other relevant verticals



Electronics



Grocery

“

Emotionally, when someone is living their most authentic life, they're actually feeling the most aligned to themselves, more than things like love or joy or excitement. When you are truly accepting of who you are, that's where authenticity comes in.

Maya Raichoor
Author and speaker

“

Sexual wellness is an important part of self-care, wellbeing, and overall health. By partnering with a leader in on-demand delivery, we're breaking new ground in how consumers can access our products, ensuring they can incorporate sexual wellbeing into their daily lives with ease and discretion.

Johannes Plettenberg
Chief Executive, Love Honey

Unleashing the true you

Unleashing the true you reflects the gentle pushback on societal expectations and norms, choosing instead to live life on your own terms. It's about breaking free from conformism and revealing your authentic personality, living in the moment and being unapologetically you.

In a world full of noise about how we should look, live, and succeed, it's easy to lose touch with who we really are. From early on, expectations chip away at individuality, making spontaneity and self-expression feel out of reach.

More people are looking to break free from the pressure to conform, carving out space for spontaneity and self-expression. Most (82%) people say they want to live life on their own terms. Nearly two-thirds wish they could be more spontaneous, and 67% say they feel relaxed, free, and unburdened when they are.

This isn't about rejecting structure – it's about embracing the kind of freedom that fuels joy and authenticity. Whether it's dressing how you feel, hosting a last-minute lunch, or rediscovering a forgotten passion, people are carving out space to be more fully themselves.

Even small, intentional acts of spontaneity can lead to a more meaningful, more alive version of life.

65%

say they would love to be more spontaneous and live in the moment.

UK 71% | DE 57% | CA 66%

86%

say expressing their true self and personality is important to them right now.

UK 86% | DE 83% | CA 88%



Consumer story: Sarah

By day Sarah is an Ops Manager in the education sector – organised, reliable and always on it. Outside of work, she's a connoisseur of London's cultural scene, always exploring new craft fairs, art workshops, and events. She uses her creativity to bring people together like the book club she organises or the dinner parties she hosts. These days, she's learning to be more intentional, protect her time and say yes to what most feels like her.

"I want to try and do everything... I'm adventurous, innovative and creative with craft things, but also coming up with new, interesting ideas and putting things together."



All consumer stories are anonymised, reflect true attitudes and behaviours and the full spectrum of people we spoke to

How on-demand delivery facilitates unleashing the true you

In a world where spontaneity and self-expression are increasingly valued, on-demand can play a surprising but meaningful role.

For those seeking to embrace more in-the-moment living, having what you need – when you need it – can remove the friction between inspiration and action. Consumers no longer have to spend their time trekking round the store – two in three Speed Seekers say that on-demand delivery will help them to be more spontaneous, and try more new things.

Whether that's grabbing supplies for a last minute gathering, ingredients for a creative recipe, or tools to jumpstart a long-forgotten hobby, on-demand delivery supports the freedom to act on instinct. On-demand empowers people to live more freely, on their own terms.



Beauty spotlight

The beauty category is centred around self-expression, confidence and feeling your best. Whether it's experimenting with a bold make-up look or doing your hair just the way you like it, the right products can make all the difference. For retailers, on-demand means showing up in the spontaneous moments where identity and expression takes shape. It puts your products in the hands of people when they're most inspired, turning emotional intent into instant action.

€1,300

The largest beauty haul delivered to one Just Eat Takeaway.com customer.

59%

of beauty buyers have felt the rush to find a perfect make-up or beauty item to complete their look.



Sexual wellness spotlight

Intimacy doesn't always follow a plan and today's consumers want the freedom to explore it on their own terms. Whether it's a spontaneous date night, a moment of self-care, or the need for added comfort or protection, on-demand delivery removes the friction from accessing what's needed.

For retailers, this is a category where speed, privacy and accessibility really matter. Meeting consumers in these moments means offering a discreet, seamless way to support confidence and care, helping people embrace intimacy that feels authentic, safe, and true to them.

51%

Of all adult toys that Just Eat Takeaway.com has sold globally, 51% have been ordered for males, 35% for females and 14% for couples.

1 in 2

Millennials say on-demand access to sexual wellness or sensitive personal care items will help them feel more in control.



09

What now?

Translating emotional needs into commercial opportunity

How retailers can meet shifting needs through on-demand with Just Eat Takeaway.com

Consumers today are shopping in more fluid, reactive ways based on how they feel, what's going on around them, and the everyday pressures they're trying to manage.

For retailers, this is a moment of opportunity. Those who can respond in real-time offering speed, flexibility and ease in the way that digital-only businesses have exploited up to now, are better placed to meet people where they are. That's where Just Eat Takeaway.com can help. Whether through the Just Eat platform or JET Go, our logistics-as-a-service solution, we make it easier for brands to show up in the right moments.

Three ways to act now:

1

Reframe everyday missions as emotional wins

Position your products around the real-life tensions consumers navigate. With Just Eat Takeaway.com, your products can become solutions to emotional, not just practical, needs. An on-demand delivery of nappies, noodles or night cream isn't just convenience; it's control, calm, or comfort.

2

Make impulse fulfilment part of your strategy

Consumers are increasingly shopping spontaneously, based on how they feel in-the-moment. Use Just Eat Takeaway.com to serve those unplanned needs, whether it's a last-minute gift, forgotten item, or care package. Elevate impulse by making it easy to act on and fulfil emotion-driven intent.

3

Use JET Go to add on-demand delivery to your own channels

You don't need to list on the Just Eat Takeaway.com platform to benefit from our logistics. JET Go allows retailers to integrate rapid, last-mile delivery into their own sites or apps, enabling one-hour delivery from store to door. It's a way to enhance your existing e-commerce offer, provide more flexible fulfilment and respond to rising expectations around speed, without building new infrastructure from scratch.

Join Just Eat Takeaway.com on our on-demand journey.

Everyday Convenience is our mission. We have both the operational tools and a loyal and receptive customer base to make your on-demand retail business a success. If you'd like to hear more about the research or want to discuss partnership opportunities, please get in touch.



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What now?

How PA can help retailers meet shifting needs

The pressure for retailers to keep up with these shifting trends and show-up in the right moments means understanding what's really driving decisions, and how your brand can serve those needs in more responsive, human ways.

That's where PA can help. We combine strategy, insight and innovation to turn complexity into opportunity, bridging emotional need with commercial growth.

Three ways PA can help:

1

Get closer to customers' emotional drivers

We uncover the emotional context behind real-world behaviours, helping to build customer-centric solutions that drive closeness, comfort, and connection. Through mixed-method research, we deeply understand and interpret evolving needs, then translate that into actionable insights that unlock better growth through breakthrough product, service and experience innovation.

2

Build for what's next

From fulfilment to future formats, we help retailers design responsive operating models that flex with shifting expectations, whether that's embracing on-demand, optimising supply chains, or adapting to fluid purchase journeys.

3

Innovate with purpose

Innovation goes beyond product launches to designing systems and propositions that align with evolving values, from sustainability and inclusivity to speed and convenience. We help brands prototype fast, test smart, and scale what works – unlocking new revenue streams and shaping customer strategies that keep them relevant, responsible, and ready for the future.

If you'd like to talk about how PA can help you adapt, or would like more detail on the research, we'd love to hear from you.

You can also explore our latest research into consumer preferences and trends [here](#).



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About PA

We believe in the power of ingenuity to build a positive human future.

As strategies, technologies, and innovation collide, we create opportunity from complexity.

Our diverse teams of experts combine innovative thinking and breakthrough technologies to progress further, faster. Our clients adapt and transform, and together we achieve enduring results.

We are about 4,000 strategists, innovators, designers, consultants, digital experts, scientists, engineers, and technologists. And we have deep expertise in consumer and manufacturing, defense and security, energy and utilities, financial services, government and public services, health and life sciences, and transport.

Our teams operate globally from offices across the US, UK, Ireland, Nordics, and Netherlands.

Discover more at paconsulting.com and connect with PA on [LinkedIn](#) and [X](#).

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