



The Rapid Evolution

The transformative future of on-demand grocery delivery and beyond



About Just Eat Takeaway.com
www.justeattakeaway.com

Just Eat Takeaway.com is a leading global online food delivery marketplace, connecting consumers with over 699,000 partners in 19 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 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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Foreword



A foreword from Guido Fambach, Executive Vice President of Sales at Just Eat Takeaway.com

Just Eat Takeaway.com has evolved massively since I started – from a local food marketplace to a global leader in food delivery. During this time, our mission and commitment to customers has always remained the same: to delight customers with everyday convenience.

In the meantime, the e-commerce experience has changed retail beyond recognition. Wider choice, improved delivery services and more personalisation have transformed our lives and we are now reaching the next tipping point in convenience and grocery shopping behaviour.

This decade will redefine the ‘right here, right now’ concept that high street stores have previously enjoyed. We will start to see a more blended experience, as convenience, efficiency and immediacy are added to our everyday shopping expectations. We are excited to see this translating in more and more people ordering on our platform to fulfil their convenience needs.

With our grocery and convenience selection, consumers are serviced with convenient alternatives whenever they need it. Instead of going to a store, customers can enjoy fast delivery from our trusted local brands such as Lieferando, Just Eat and Thuisbezorgd. The research presented in this white paper will provide you with insights into the readiness of consumers to the growing convenience selection through local convenience platforms like ours.

The report addresses the ‘push’ and ‘pull’ forces driving these changes: the things people don’t like about going to shops, and the great benefits quick delivery unlocks through a wide variety of local stores in a single app, underpinned by trusted brands.

I wish you an insightful read. All of us at Just Eat Takeaway.com are at your disposal to work with you and to empower everyday convenience.

Guido Fambach



A foreword from Frazer Bennett, Chief Innovation Officer at PA Consulting

Over the last 20 years, the e-commerce experience has proven itself highly addictive. Wider choice, improved convenience, personalisation. Today, 24 hours is a long time to wait for something you’ve ordered online.

This rise in rapid on-demand delivery – from store to door – is further eroding the ‘right here, right now’ differentiator that, until now, high street stores enjoyed. As the immediacy of consumer experience moves from novelty to necessity, the next major shift is here. Enter the Rapid Evolution.

Consumer demand and commercial innovation have driven fundamental changes in retail. Shoppers increasingly look for better alternatives to their experience: more choice, convenience, and control. At PA, we’ve laid the foundations for this future. From developing the first self-serve pregnancy test in 1976 to bringing the outside in through a range of virtual and mixed reality applications for health, retail, operations, entertainment, and more. We’ve helped major high street brands to capitalise on the digital opportunity and get closer to customers – meeting their needs, at pace.

It’s inevitable that on-demand delivery will become the norm. Companies like Just Eat Takeaway.com are catalysing this change. Not just in their core business of takeaway and restaurant foods, but for groceries and beyond. Forgot your aunt’s birthday? Send her favourite chocolates right to her doorstep within the hour. Woke up with a splitting headache? Order paracetamol for delivery in 20 minutes. Your son left his packed lunch behind? Get a parent-approved meal deal delivered to the school gate.

The Rapid Evolution offers people what they want – exactly when they want it. And it enables companies to operate seamlessly across the online and real worlds, baking in new offers that cut for themselves a larger slice of the pie. This opportunity for traditional high street retailers will inspire new service offers that mix and merge the things people want in a way that has never before been possible. Blend this immediacy of delivery with AI-inspired ‘purchase anticipation’ and immediate personalisation of product (“my box of chocolates, just the way I like it”) and we’ll start to uncover a new future for retail experiences.

The next generation of consumers will expect cashless, immediate, hyper-personalised retail interactions. They’ll want products and experiences to be formulated specifically for them. This calls for different delivery channels and new ways to connect. This shift is profound, and the Rapid Evolution plays a large part in it.

We spoke to 4,000 consumers to explore perceptions of on-demand delivery services. It’s no surprise that shoppers welcome this advance. What did surprise us, though, is their acute awareness of how it will change their lives, and the extent to which they want it – right now.

Frazer Bennett

Join us on a speedy journey...

Exploring the state of the on-demand industry and the challenges it faces

The on-demand landscape

On-demand delivery – delivery of items in under an hour from order – has surged onto the European grocery shopping scene, promising speedy convenience and seamless integration into busy lifestyles. While currently still in its infancy, the European on-demand grocery market is already a \$11.19bn business (2024), and is expected to grow to \$16.54bn by 2029, with an annual growth rate of 8.13% (CAGR).¹

There is clearly consumer appetite for on-demand delivery, unsurprising considering worldwide trends in convenience and shopping. Developing nations – the likes of China, India and Brazil – are ahead of the convenience curve, with on-demand grocery delivery becoming a fixture in urban hubs. In China, on-demand grocery delivery is fueled by Tencent-backed Miss Fresh and Meituan Meicai, leading to projected sector growth of 11% in the next five years. In South America, on-demand delivery has become the norm, with consumer favourites Rappi and iFood harnessing local consumer insight to power speedy growth.

While on-demand grocery delivery is a known feature of European cities and towns, it hasn't immediately achieved broad acceptance. Critics say on-demand delivery only serves irregular emergency occasions and will struggle to expand. Perhaps as a result, negative EBITDA is a strong theme amongst dark store 'unicorns' promising delivery in under 15 minutes. Consolidation of on-demand delivery businesses is relatively common, and some brands have started scaling back their European operations. There are seemingly significant challenges to scaling on-demand focused businesses, let alone making a sustainable profit within the European marketplace.

So, given recent trends, is on-demand delivery an area that a brand can sustainably operate in? What do shoppers REALLY think about on-

demand delivery, and what does the future hold for the sector? Surely it is more than just a quick emergency shop.

On-demand grocery projected growth

Projected user penetration rate (by 2029)	Expected annual growth rate (CAGR 2024-2029)	
15.7%	8.59%	 UK
19.5%	8.83%	 NL
6.0%	9.56%	 DE
16.0%	8.06%	 ES

Source: Statista (2024), Quick Commerce projected growth – Grocery

About this report

Just Eat Takeaway.com, in partnership with PA Consulting, will shine a light on the future of on-demand delivery, backed by robust data from the mouth of shoppers themselves.

This paper will explore the next evolution of on-demand delivery – from the changing on-demand economy and the shifting consumer mindset, all the way to the advancing shopping ecosystem and where shoppers want the category to go next (spoiler alert: it's way beyond groceries). Most importantly, the paper will evidence where initial entrants got things wrong and the key ingredients needed for retail businesses to thrive in this sector, and to make on-demand delivery a viable and sustainable business option.

To get on-demand right, you need to put humans at the centre and design for their needs and preferences, priorities and pain points. To do this, we surveyed 3,000 Speed Seekers across the UK, Netherlands (NL), Germany (DE) and Spain (ES), allowing us to put on-demand delivery under the microscope with those that know it best. We also spoke to 1,000 Pacey Prospects to understand broader opinion of the sector and likely future uptake. To delve deeper, we conducted in-depth exploratory research with 30 Speed Seekers and Pacey Prospects in the UK to explore their routines and habits, and expectations of the future.

So, buckle up – we're driving into the Rapid Evolution.



Who are the Speed Seekers?

To predict the future, you need to investigate the people already living in it. The Speed Seekers are the early adopters of the on-demand delivery world, and have ordered groceries for on-demand delivery at least once in the last 6 months.

By putting Speed Seekers at the fore of the research, it allows us to forecast how mindsets will change and the sector will evolve in the future.



Who are the Pacey Prospects?

To understand where the immediate growth lies, you need to explore who will be next to exist in the category. The Pacey Prospects are people who are open to on-demand delivery, but haven't yet tried it.

By layering the Pacey Prospect perspective, we can begin to prioritise the most compelling benefits of on-demand that will be the next tipping points for adoption.

03

The transformative impact on shoppers

On-demand delivery offers shoppers back their freedom, time, and peace of mind

Reclaiming time

Time. We're told to 'use it wisely' or 'live in the moment'. At the same time, we're bombarded with obsessive messaging about 'productivity' and 'getting things done'. But what if 'getting it done' is the weekly shop.

In the supermarket, it's impossible to multitask. We hunt for items in a jungle of often-irrelevant options. When this is combined with life's daily admin, holding down a job, completing the household chores, and all the rest that gets thrown our way, time is in short supply. Wouldn't it be nice to be able to take some time back? More quality time at home with family, an

evening out with friends, 30 minutes of 'me time' to indulge in a good book or favourite TV show... Surely we'd rather be doing that than spending more time at the shops.

On-demand delivery is giving shoppers back their most precious resource. The speed of on-demand grocery delivery creates the time and space people crave.

Our Speed Seekers identified a revolutionary time windfall as a result of using on-demand grocery delivery:

Time is in short supply

71%

Speed Seekers say that they're always busy and on-the-go

UK 71% | NL 65% | DE 72% | ES 75%

Creating time

75%

Speed Seekers love how on-demand delivery frees up their time for the moments that really matter

UK 76% | NL 69% | DE 72% | ES 81%

01 Free to be
Living smarter with more time for doing what you love

3 in 4



Speed Seekers agreed that on-demand delivery helps to free up their time, meaning more time to relax, spend time with friends and family and doing the things that matter. In fact, the majority reported that it gives them back a minimum of 30 minutes, that would otherwise have been spent trekking around the supermarket.

02 Peace of mind
Lightening the physical and mental load by avoiding the hassle of in-store

2 in 3



Speed Seekers say that on-demand delivery is the smart and savvy choice; it helps them know that they're in control and have got things covered. It's shopping, but on their terms.

03 No compromise
What you want, when you want it

3 in 4



Speed Seekers see the always-on nature of on-demand grocery delivery as a key benefit, meaning they don't need to adapt their lives around buying essentials.



An evolved way to shop

Transformative gains don't stop at time. We have long known that the in-store shopping experience is less than perfect for shoppers. An overwhelming 9 in 10 of both Speed Seekers and Pacey Prospects have experienced pain points while shopping for groceries in-store. The sector is crying out for a solution that prioritises consumer health, convenience, and time above all else.

Our Speed Seekers told us how on-demand delivery offers a complementary alternative to the pressures and pain points experienced while buying groceries

in-store. In-store was perceived to be impersonal, crowded, stressful, and can be seen to lead to sensory overload. Meanwhile, on-demand delivery offers a personalised, less stressful, and more comforting shopping experience.

Why wouldn't shoppers adopt on-demand delivery when it offers the calm, control, and quiet comfort they crave?

The future of shopping looks like this....

PAST | In-store experience

Impersonal
Hunting through irrelevant items to find the few products you really want

1 in 4 

say they struggle to find the items they want when in-store shopping.

Crowded and hectic
Long queues and people crowding the aisles

1 in 2 

say long checkout queues or crowded, busy stores are pain points of their shopping experience.

Sensory overload
Over-stimulating noises and atmosphere within store environments

1 in 5 

experience sensory overload when shopping in-store.

FUTURE | On-demand delivery

Personalised to suit you
Decision-making is easier and choice paralysis minimised

3 in 4 

agree on-demand delivery offers a personalised experience providing recommendations based on who they are and what they want.

Stress-free
A calm environment where you can move at your own pace

3x 

On-demand delivery is 3x more stress-free than in-store shopping.

Quiet comfort
The on-demand delivery experience is like a warm safety blanket

1.5x 

On-demand delivery is 1.5x more comforting than in-store shopping.



Frustration while in-store shopping is common

93%

of Speed Seekers have experienced pain points while grocery shopping in-store

UK 93% | NL 93% | DE 92% | ES 95%

04

Growing the shopping ecosystem

On-demand delivery is shifting from an urgent need to an established routine, redefining the dynamics of consumer shopping behaviour and spending habits

Growing baskets - an addition to other grocery shopping methods

Never before have we had so many ways to buy groceries. From embarking on the big weekly shop, to ordering a meticulously curated meal kit, to scheduling an online delivery. Now consumers are presented with a myriad of choices. These choices offer more flexibility, but all are fighting for a share of the same shopping routine.

Fundamentally altering the shopping ecosystem, on-demand delivery has disrupted and expanded the realm of shopping possibilities. Consumers are embracing the speed and convenience in an additive way - 76% of Speed Seekers are buying on-demand

groceries in addition to their regular shopping habits. The result? A notable uptick in spending and expansion of the overall shopping basket. Speed Seekers estimate that on-demand delivery accounts for at least 20% of their weekly grocery basket: that's 20% that, according to many, didn't previously exist.²

On-demand delivery has opened up a new world of opportunity for growth, with 53% of Speed Seekers and nearly half of Pacey Prospects expecting to use on-demand delivery more in the next year. For retailers, this means no more fighting for a slice of the same pie.

On-demand will boost overall spend

60%

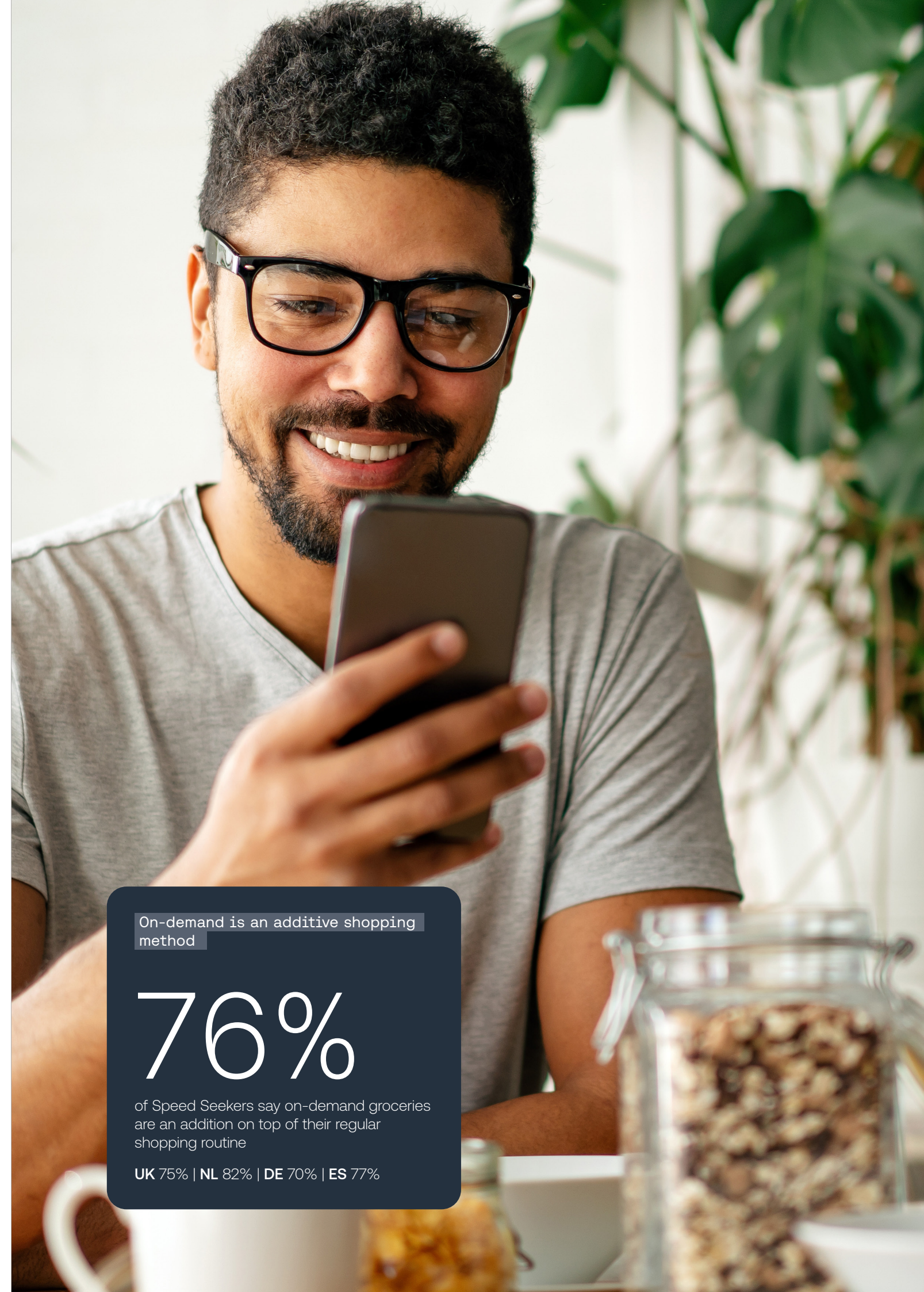
of Speed Seekers will buy more groceries now with on-demand delivery as an option

UK 60% | NL 55% | DE 61% | ES 65%

On-demand grocery with Just Eat Takeaway.com is growing

+152%

increase of on-demand grocery Gross Transaction Value vs. 2022 on the Just Eat Takeaway.com platform



On-demand is an additive shopping method

76%

of Speed Seekers say on-demand groceries are an addition on top of their regular shopping routine

UK 75% | NL 82% | DE 70% | ES 77%

Revolutionising Routine
On-demand delivery is creating new shopping occasions and moments of delight

This growth in spending and shift in shopping habits raises the question - where are these moments coming from? What is causing so many shoppers to suddenly buy more groceries than ever before?

The expectation around on-demand has initially been rooted in the idea that its main purpose is for urgent, impulsive situations. Pacey Prospects who haven't yet used on-demand delivery agree - they feel their future of on-demand shopping will be driven by urgency with order missions shaped by necessity. Some may even go as far to perceive it as a tool for the lazy or for those who can afford to

pay for convenience, driven by a need to avoid effort and shirk responsibility. But, our research shows that these misconceptions are dispelled by the Speed Seekers who have adopted it as a strategic choice for managing time. Looking at Speed Seekers behaviour gives us a glimpse into how perceptions and behaviour shifts as on-demand becomes part of a repertoire and evolved approach to shopping. In fact, frequent Speed Seeker shoppers (using daily) are 2.3x more likely to say it is a 'planned' purchase than those shopping less frequently, and they are also 1.3x less likely to describe it as 'impulsive'.

On-demand grocery adoption spectrum



Early adoption

4 in 5



Pacey Prospects believe their future of on-demand will be urgency driven:

- High perceived urgency and necessity
- Staple items
- Unprecedented speed is the USP
- On-demand is a 'lifesaver'
- Permission to adopt a new habit



Established usage

3 in 4



Speed Seekers say on-demand is changing the way they manage their homes and routines:

- Available when it suits
- Staple and impulse items
- On-demand is the USP
- On-demand is a 'reliable companion'
- Evolved approach to shopping



Across both future prospects and current Speed Seekers we start to see a new world of both impulsive and planned shopping missions opening up, facilitated by the ease and convenience of on-demand. Far from being purely a functional ‘top-up’ shop, these missions are creating new, more flexible ways to eat, cook, and care for others.

For instance, on-demand offers healthy alternatives to the traditional takeaway; more proactive and less rigid meal planning helping to make dinners more exciting; caring for our loved ones, connecting and enjoying time together. Below we’ve highlighted a selection of the future scenarios we uncovered in the research and that will be next to take hold as on-demand grows in prevalence.

Fueling the rapid gratification cycle
The more immediate, seamless, and convenient experience elicits a feeling of satisfaction

Once shoppers start ordering through on-demand delivery, there’s no turning back. The notion of ‘discovery’ – doing something new and making life easier – elicits a strong emotional feeling of savviness, accomplishment, and pride. The ease and instant gratification makes shoppers feel smarter and more in control. These feelings grow the more they order. As on-demand becomes part of a routine and an ingrained behaviour, it creates a positive feedback loop, reinforcing the behaviour and fuelling a cycle of repeat usage. We see this cycle play out for our Speed Seekers – 89% say

that they will buy groceries on-demand more or the same amount in the next year.

freeing spontaneity. Regular routine is replaced by a more fluid and interrupted lifestyle.

Over time, this gratification cycle is only going to become more rewarding as data-driven algorithms will make the experience more personalised and intuitive. As we’ve seen already, Speed Seekers agree that on-demand delivery is more personalised than other types of shopping and these recommendations will get stronger and more powerful the more on-demand platforms are used.

This ultimately evolves shopper’s everyday routines. Burdensome planning is replaced with

EVOLVED ON-DEMAND SHOPPING MISSIONS | Future scenario potential uptake

Planned
Healthy Takeaway: Empowering healthy lifestyles no matter the situation...



With almost three in four Speed Seekers stating that they’re always busy, juggling numerous responsibilities, it is no surprise that they can struggle to find the time to cook. And with health and wellness trends showing no signs of abating, on-demand provides an easy and guilt-free solution to the traditional takeaway.

Impulsive
Hasty hosting: Creating moments of connection and shared enjoyment...



On-demand shopping offers a lifeline of convenience and efficiency when hosting. Whether that’s for unexpected guests or impromptu gatherings, the ability to swiftly buy essential provisions removes areas of friction from hosting and creates a more enjoyable experience for hosts and guests.

Planned
Care Package: Bridging the gap between digital and physical...



Over time our interactions with loved ones have become more digital. As populations move out of close proximity in urban centres, we are connecting less and less in physical ways. On-demand can bridge that gap, offering the opportunity to send a care package to a loved one who is ill, or a last minute gift at the click of a button and within minutes.

Impulsive
Craving Crush: Treating ourselves when we get the urge...



Takeaway food has long been synonymous with indulgence, offering a convenient escape from daily life. On-demand shopping expands the scope of these treat moments, allowing us to do this in more multifaceted ways.

EMOTIONS ASSOCIATED WITH ON-DEMAND GROCERY DELIVERY | By on-demand usage frequency

More frequent (daily) on-demand grocery Speed Seekers feel...

1.4x
more in control

2.9x
more proud

1.6x
more excited



...than less frequent (monthly) on-demand grocery Speed Seekers



Market Spotlight

Spain's advanced on-demand mindset means further grocery basket growth

Spain is relatively advanced in its transition to on-demand delivery as a household staple, demonstrated by their evolved approach to shopping.

Spanish Speed Seekers are embracing more planned ordering occasions and are turning to on-demand ordering for special events, or to treat themselves or a loved one. That's why they feel even more smart and savvy and less impulsive when ordering groceries for on-demand delivery.

Looking to the future, Spaniards have a much more developed ideal of what on-demand delivery could be. Three in four Spanish Speed Seekers felt that on-demand delivery should offer everything they could want or need, ranging from groceries to electronics.

On-demand delivery is here to change the retail experience, and Spaniards are ready to lead the charge.



1.4x

of Spanish Speed Seekers are more likely to feel their on-demand grocery ordering is savvy, or smart, than Speed Seekers from other nations

1.6x

of Spanish Speed Seekers are more likely than other nations to order on-demand groceries for a special event

Wider societal advantages

On-demand delivery can offer societal benefits beyond mere convenience that could positively impact society

Empowering societal benefits

On-demand grocery delivery clearly saves time and eliminates the key pain points experienced in-store - it has the potential to benefit shoppers' physical and mental health. However, the benefits of on-demand delivery are more far-reaching than for individual shoppers. The benefits of on-demand grocery delivery could contribute towards societal improvements too...

Strengthening sustainability

On-demand delivery could help reduce food waste

The detrimental impact of food waste on society is well-known. Europe generates over 58 million tonnes of food waste annually across households, retail and food services. This equates to 132 billion euros worth of food lost every year. In addition to the economic impact, there is a significant knock-on effect on the environment too, with food waste accounting for approximately 16% of greenhouse gas emissions from the European food system.³

The stats are damning but unsurprising. Many people are guilty of buying more than they need when buying groceries for the days ahead. Unexpected plans come up, appetites change, life happens.

Our Speed Seekers identified that on-demand delivery may be one way to help reduce a household's food waste. The majority of Speed Seekers said that on-demand delivery enables them to buy what they need, when they need it - they are no longer at the mercy of spontaneous plans that may render pre-bought ingredients redundant. On-demand delivery is one way to help reduce food

waste and encourage more economical shopping.

As an emerging area for the retail industry, further research is required to understand on-demand grocery's environmental impact across the order journey. Speed Seekers are looking to on-demand service providers to prioritise sustainable practises, so understanding the on-demand carbon footprint and the impact of more frequent orders is essential.

Food waste is a material issue for Just Eat Takeaway.com; they take their responsibility to help mitigate food waste and encourage sustainable practices seriously, ensuring the sector is future proofed for both people and the planet.

Prioritising sustainable practices

74%

of Speed Seekers expect rapid grocery delivery services to prioritise environmentally sustainable practices

UK 73% | NL 69% | DE 77% | ES 78%

Ordering what you need, when you need it

2 in 3

Speed Seekers agree that rapid grocery has transformed their grocery shopping, allowing them to order prompt and fresh, as and when needed

UK 63% | NL 60% | DE 69% | ES 70%



Market Spotlight

Green-fingered Brits welcome on-demand delivery's positive environmental impact with open arms

British shoppers more likely than other nations to be enamoured by on-demand delivery's sustainability credentials. A recent study ranked the UK as the 'third greenest' country in the world, just behind Sweden and Denmark.⁴ A large part of this is likely due to the 88% of Brits who feel a personal responsibility to help the environment.⁵

Our UK Speed Seekers want convenience without compromising sustainability - they are especially keen on having ingredients bundled together for on-demand delivery. This gives them the convenience of a meal/recipe kit, but without the excess packaging and waste.

For retailers, bolstering their positive environmental impact by offering on-demand delivery as an option is likely to work well to win favour with a UK audience.



79%

UK Speed Seekers agree that they would love it if ingredients for a specific recipe were bundled together for on-demand delivery - it would make last minute meals so much easier!

1.6x

UK Pacey Prospects - people who have never used on-demand delivery - are 1.6x more likely to order groceries through on-demand delivery than with a meal/recipe kit in the next year

Helping to build a sustainable future

Just Eat Takeaway.com have trialled food waste initiatives in Canada to help stores and restaurants manage the amount of food leftover at the end of the day.

Working with 40 partners, the 'Do Good Deal' programme helped partners better manage their food waste and operational costs by turning surplus end of day food into discounted meals in the form of a 'surprise bag'. Pilot tests have shown a consistent increase in average order value at ~\$6 per order - while of course helping to save our planet.

Consider how we could apply these principles to on-demand grocery: Perhaps offering ingredient bundles, including food close to expiration, to make a nutritious dinner. Or challenging customers to make a meal from a mystery bag of ingredients near expiry. The opportunities for on-demand to offer engaging yet sustainable initiatives are endless.

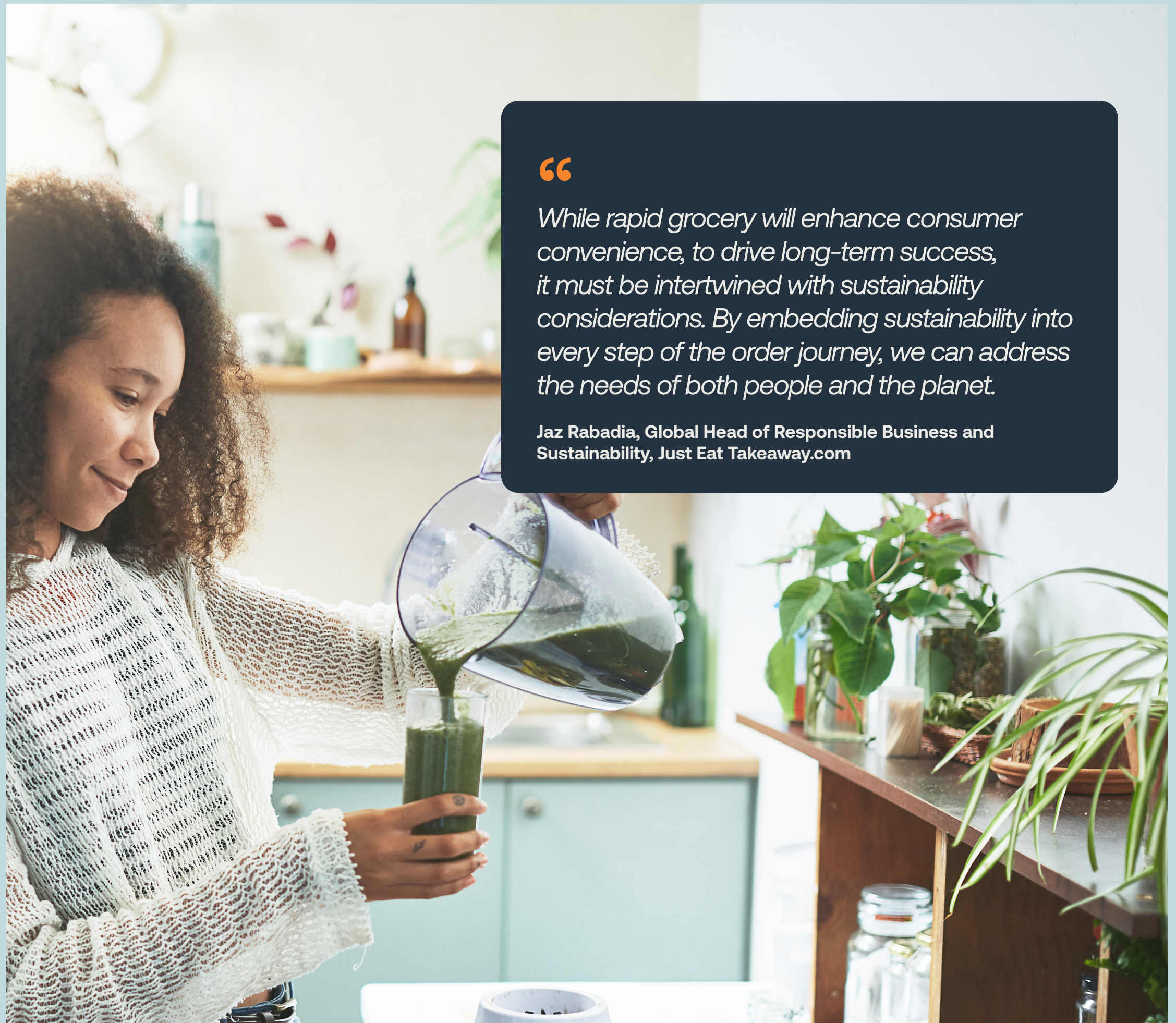
Number of meals provided through the Do Good Deal initiative

304

“

While rapid grocery will enhance consumer convenience, to drive long-term success, it must be intertwined with sustainability considerations. By embedding sustainability into every step of the order journey, we can address the needs of both people and the planet.

Jaz Rabadia, Global Head of Responsible Business and Sustainability, Just Eat Takeaway.com



Empowering people

On-demand delivery helps to meet the needs of those living with disability or accessibility needs

Another key societal benefit of on-demand delivery is its potential to empower people, including people who live with disability or accessibility needs. Disability is an important feature of many people's lives across Europe. Market census data classifies disability in various ways, but estimates show that 24% of the UK live with some kind of disability,⁶ 32% in the Netherlands population, 30% in Germany, and 30% in Spain.⁷ Disability encompasses physical, visual, auditory, speech and cognitive accessibility needs, and is prevalent across all demographics and life stages. Building services and products that meet the needs of people with disabilities helps to empower society as a whole.

On-demand grocery delivery is one of these services. It offers another way for people to access the items they need - helping to provide both functional and emotional benefits. For instance, it offers the safety of a familiar home environment, and respite from a loud and crowded shopping experience. It offers the convenience of not having to travel. When hosted on a screen reader compatible web page or app, it offers a tailored set of recommended products.

This is useful for everyone. We all can encounter situational access needs, such as caring or childcare responsibilities, illness, or vehicular breakdown. But for people living with disabilities, on-demand delivery has the potential to offer game changing empowerment, enhancing their independence and quality of life.

Meeting people's diverse needs

79%

of Speed Seekers agree that on-demand delivery champions accessibility and inclusivity, ensuring a broad range of products are available to everyone

UK 81% | NL 73% | DE 80% | ES 83%



“

I find on-demand grocery a real enrichment in the age of media possibilities and urban mobility. I myself am seriously ill and sometimes cannot move out of the house

Male, 35-44, Germany

Building resilience

How to win at on-demand delivery by building a sustainable and resilient business model

On-demand grocery delivery offers an exciting opportunity for retailers to target shoppers in new ways. Consumers want what they want, when they want it. And once they're in, they're hooked.

As the on-demand delivery market continues to evolve, lessons from the rise and fall of brands like Getir and Gorillas serve as valuable insights for retailers. With the right approach, retailers can tap into the potential of on-demand delivery and the ever-growing desire for ultimate convenience.

The challenge is to build a sustainable and resilient business model that can support this demand, and overcome the obstacles faced by rapid grocery brands that have come before.

Why brands like Just Eat Takeaway.com are different

Food delivery aggregators like Just Eat Takeaway.com offer a fundamentally different experience to dark store formats (i.e. orders are fulfilled from

warehouses, or 'dark stores', rather than a consumer shop) and single-store concepts (i.e. offers on-demand groceries from a single retailer) – in terms of business model, brand, and operational infrastructure.

01 Range is king

Consumers want all retailers – large brands and local stores – under one digital roof

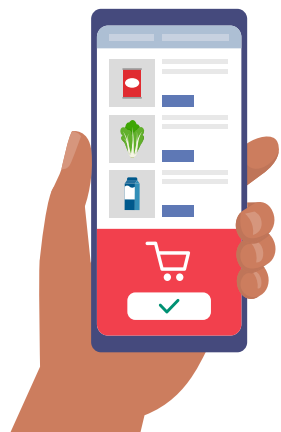
Three in four of our Speed Seekers said that having a range of retailers to choose from, all in one place, is an important on-demand satisfaction driver. Brands like Just Eat Takeaway.com offer a unique mix of large scale retail brands as well as local stores, giving consumers range as well as a feeling of familiarity. In contrast, dark store brands and single-store concepts falter by offering a singular and isolated retailer experience, meaning consumers are unable to easily browse through a diverse range of options. Delivery aggregators make shopping easy; it's all under one digital roof.

Consumers want a range of retailers to choose from

75%

of Speed Seekers say a range of retailers to choose from is important to driving satisfaction with on-demand

UK 78% | NL 60% | DE 74% | ES 86%



Shoppers want on-demand to offer their local retailers

“

I expect it to come from my local Tesco because that's my local store where I shop. I still feel like I'm supporting my local store and community, which is pretty important to me

Speed Seeker, Female, 25–34 London

JUST EAT TAKEAWAY.COM CURRENTLY PARTNERS WITH...

160

Grocery/convenience brands across Europe



Flink | Mediamarkt | Saturn | Royal Donuts | GameStop | Mittemeer | Dat Backhus | Dallmeyers | H.v.Allwörden | Madame Croissant | Barfers | Pets Deli | Edgar & Cooper | Sweet Candy | Feinkost Pritzl | La Floraison | Blumen Florentine | Jouz & Louz | VINOS | Senftenauer Apotheke | Shell | Lieferando Express | Lego



Dia | Clarel | llaollao | Condis (Grupo IFA) | Smöoy | Luda Partners | Häagen Dazs | FloraQueen | Bombon Boss | Veritas | Kibus | Dia | (Independent) | Galp | Tu Super | Supermercado Family Express | Kibus | Mercado 47 | Carrefour Express | Veritas



Flink | Ben & Jerry's Grom | STACH | The Tosti Club | Vlaamsch Broodhuys | SPAR | Marqt | Henri Willig Kaas

12,971

Individual grocery/convenience stores



Co-Op Group | Londis | Iceland | One Stop | Morrisons Daily | Premier | ASDA Grocery | Sainsbury's | SPAR | Southern Co-Operative | Central England Co-Operative | Midcounties Co-Operative | Totally Wicked | VPZ | Shop 'N Drive | Parfetts | Budgens | Asda Express | Park&Shop | Evapo | East Of England Co-Operative | Costcutter | Lincolnshire Co-Operative | Bargain Booze | Nisa | SIPUP | Scotmid Co-operative | Vape HQ | Spar 24/7 | Family Shopper | Best One | Ascona Group (NISA) | Vape Blizz | Vapez 24/7 | The Kay Group | Pyramid Pharmacy | Tariq Halal Meats | Centra | Zapp | Whisky Circle | Karan Retail | Prime Vapour | Ziggicig | Chana Chemist | Pop Specs | Gorillas | Pricewatch Ltd (Nisa) | TAP Retail Limited (Nisa) | McColls | Go Local | Vapourz Lounge | Spivack Chemist | KeyStore | Highway Stops | Getir | FloraQueen | Woods Chemist | Wine Rack | Sterling Chemist | Starbucks | Sherrys Chemist | Ridgway Pharmacy | Queens Pharmacy | Pinewood Stores | Pallion Pharmacy | Little Dessert Shop | Lewis Pharmacy | Lambeth Pharmacy | Lakes and Dales Co-operative | Kings Pharmacy & Opticians | Kings Pharmacy | Keystore More | IQ Pharmacy | High street Local | Freed Pharmacy | Fishpool Pharmacy | CK Pharmacy | Church Street Pharmacy | Camden Pharmacy | Bramley Chemist | Boost Convenience | Allchin Pharmacy

02 Global brand love and loyalty is a must

The tools to create category stickiness

The brands operating in the on-demand grocery scene have so far lacked two key ingredients: mass-market brand familiarity and love. Dark store brands have been new untested entities, while a brand like Just Eat Takeaway.com is a much-loved household name. The figures speak for themselves – they’ve achieved brand awareness levels of 88% across Europe. And one in two would consider using Just Eat Takeaway.com specifically for on-demand grocery.

Well-known food delivery aggregators can build category stickiness, to ensure customers come back again and again. In fact, 90% of Just Eat Takeaway.com’s on-demand grocery customers say that they will order on-demand more or the same amount next year. Furthermore, the number of Just Eat Takeaway.com on-demand grocery customers is up by nearly 10% in Q1 of this year (2024).

This level of brand reputation also rubs off on retail partners. Speed Seekers reported that they were more likely to perceive a retailer as modern, trustworthy, and relatable if they were to be seen on the Just Eat Takeaway.com platform for on-demand grocery delivery. They were also likely to see a retailer as more able to cater to their broad range of shopping needs. High levels of brand familiarity can build order volume, while also creating a halo effect for its partners.

Just Eat Takeaway.com has mass market brand familiarity

88%

of consumers are aware of the Just Eat Takeaway.com brand and what it offers

UK 89% | NL 91% | DE 88% | ES 85%

03 An offer with operational excellence

The infrastructure to successfully deliver

Delivery in under an hour is a must-have for consumers, and this time pressure ramps up in emergency-driven scenarios. However, what is potentially more important is that brands deliver on their speed promises. Don’t make a promise you can’t keep, simple. Consumers want to feel reassured that they’re buying from a platform that has their back, will support them, and will deliver on time. It’s therefore unsurprising that brands who repeatedly fail to deliver don’t make the cut for shoppers. The era of rapid delivery brands before didn’t have the operational infrastructure required to deliver on their promises

Food delivery aggregators, however, are setup to do just that – deliver. Fleets of thousands of delivery drivers across Europe are primed and ready to meet this shift to on-demand. The logistical infrastructure to meet the on-demand speed requirements is already in place. Just Eat Takeaway.com’s customer satisfaction scores are 78%, and satisfaction with speed of delivery, specifically, has reached 83% – they know how to deliver on their promises.

Just Eat Takeaway.com knows how to deliver on their speed promises

4 in 5

of Just Eat Takeaway.com’s on-demand grocery customers are satisfied with the delivery speed

Source: Just Eat Takeaway.com Grocery Tracking Survey
(Data from UK, NL, DE, ES, CA, AU)



What's next for on-demand? Looking beyond groceries

Exploring the next evolution of on-demand delivery and opportunities for retailers to further grow the consumer basket and customer base

The next frontier

With evolving consumer mindsets and notions of convenience, grocery is only the start for on-demand delivery. It's now only a matter of time before large numbers of shoppers will consistently access a vast range of different products - beyond groceries - at the speed of a click. Think: health and pharmacy products, DIY items, clothing, beauty and skincare products, baby items or petcare. Even ordering small electronics for on-demand delivery is on the table.

We're already seeing a limited number of health products, flowers, and baby care items creep onto the on-demand shopping scene in the UK and Spain, markets further along in their on-demand adoption journey. This is only the beginning; there are an unlimited number of avenues the industry could go down.

This is driven by huge consumer appetite for a range of different verticals - 93% of Speed Seekers reported that they are interested in ordering a non-grocery product for on-demand delivery. The same goes for Pacey Prospects - nine out of ten are keen to try.

But given the wide range of potential verticals, which products will shoppers expect to buy on-demand next? What occasions and need states do different verticals serve, and for which audiences?

We're now turning our attention to the next frontier of on-demand delivery...

Offering future verticals for on-demand delivery is the natural iteration of convenience

75%

of Speed Seekers agree that on-demand delivery will become a part of our daily lives

UK 77% | NL 70% | DE 73% | ES 79%

2 in 3

of Speed Seekers agree that on-demand delivery will offer everything they could want or need

UK 67% | NL 60% | DE 66% | ES 75%

The rapid roadmap

Given that there are so many product avenues that on-demand delivery could go down, it's important that we take a step back and evaluate where the sector will go next. After speaking to our Speed Seekers, we developed a vertical adoption roadmap. Backed by quantitative data, it helps us to understand which product categories consumers expect to be ordering on-demand in the immediate, approaching, and short-term future.

By testing each of the on-demand categories on both rational and emotional metrics, we can start to map where consumer attention and spending will go next.

Explained

The vertical adoption score

We can combine the following metrics, encompassing both rational and emotional reactions, to assess what Speed Seekers look to next for on-demand delivery

Rational interest



Emotional delight

Rational interest score

% interested in ordering the vertical for on-demand delivery, minus the % that would reject it

Emotional delight score

% that would be surprised and/or delighted if they could buy the vertical for on-demand delivery

ON-DEMAND CATEGORY ADOPTION ROADMAP

Immediate

Speed Seekers identified pharmacy/health items and flowers as the immediate verticals they expect to be shopping on-demand - both scored highly on delight and interest metrics. But don't forget pet care for pet owners and baby/childcare items for parents - these verticals fall into the immediate adoption category for these in-market demographics.



Approaching

Moving further along the roadmap, beauty products, clothing, electronics and home appliances sit within the 'approaching' territory. These are verticals that shoppers expect next for on-demand delivery, all eliciting significant interest from Speed Seekers.



Short term future

DIY items and gardening supplies are more likely to be adoption areas in the short-term future for consumers. There is significant consumer appetite for these verticals, and with the right logistics strategy in place these will be on-demand orders of the future. As penetration of these categories grows for on-demand, consumer expectations will start to develop with it.





Market Spotlight

Pharmacy and health products emerge as a top on-demand opportunity for German shoppers

What does the vertical adoption roadmap look like for German shoppers? Our research shows that non-prescription/over the counter pharmacy and health products are even more likely to be immediately adopted, with over half of Speed Seekers expressing a strong interest in ordering this category on-demand. The same patterns are seen for Pacey Prospects, despite them not even using on-demand for groceries just yet.

When we consider what is happening to German pharmacies more broadly, eagerness for these pharmacy products on-demand doesn't come as a surprise. The recent closure of over 3,000 German pharmacies means there has never been fewer physical pharmaceutical stores.⁸

However, demand for pharmacies is at an all time high. Workforce recruitment and retention difficulties are complicating the picture. Perhaps there is a role for on-demand delivery to bridge the gap?



54%

of German Speed Seekers are interested in Pharmacy and Health products for on-demand delivery

15%

of pharmacies in Germany have closed over recent years; usually due to a difficulty finding staff



Market Spotlight

Pet products prove to be a key on-demand growth area for Dutch shoppers

The Dutch market has a slower development trajectory when it comes to on-demand delivery. Our research shows that many Speed Seekers are still in the earlier stages of their on-demand journey, and are learning how it best suits them. Urgency-driven order missions are dominant for now, with pre-planned occasions a more secondary mindset.

However, one area that shows high future potential for Dutch shoppers is petcare. Petcare emerged as a top vertical for immediate adoption amongst Dutch Speed Seekers, with over a third reporting high interest in ordering petcare for on-demand delivery.

More broadly, nearly half of Dutch households have a pet. Pet food especially presents a huge market, as many Dutch pet owners begin to look for pet food that is more nutritious and specialised, and are willing to spend to get the best. Bringing petcare into the on-demand world is set to land brilliantly with the Dutch.



1 in 3

of Dutch Speed Seekers showed high interest in Pet Care items as a future vertical

Future growth opportunities

On-demand delivery's move into new product categories represents a key avenue of growth for retailers in multiple different ways. Future on-demand categories have the potential to grow the overall consumer basket, can tap into new purchase occasions, and attract key audiences. Let's look into these three avenues of growth in a bit more detail...

01 Financial growth

Similar to what we have seen for on-demand grocery delivery, on-demand delivery of new product categories offers shoppers an additional way to shop with their favourite retailers. Rather than cannibalising existing shopping channels, on-demand is a complementary means to grow the consumer basket. Our research evidenced this across all types of categories tested - for flowers, 73% Speed Seekers said on-demand delivery would have an additive impact, 77% for beauty/skincare and 70% for babycare items.

It's therefore unsurprising that two in three Speed Seekers said that they would be likely to spend more on a given product category than they do now if they could get it delivered on-demand.

02 Reaching target audiences

On-demand delivery of new product categories can also work to attract a broader range of generations, life stages and income. This will have a significant impact on helping to grow and retain user bases. Want to target millennials with a higher income? Then flowers and pharmacy items are the products to push when building your on-demand delivery strategy. After an urban Gen Z audience? Then consider dialing up beauty/skincare products and fashion. Understanding the optimal product mix and how this works for on-demand can help ensure a retailer's impact on a range of demographic cohorts.

Growing the consumer basket

74%

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

UK 78% | NL 62% | DE 73% | ES 81%

Building the future of on-demand

Just Eat Takeaway.com has partnered with a large electronics retailer in Germany since Spring 2023, offering consumers access to a range of electronics products on-demand, from smartphone chargers to computer accessories and audio equipment.

The initial challenge was to make consumers aware that on-demand electronics was now available to them. The partnership's strong logistics model and marketing plan ensured growing consumer awareness and adoption, as well as continuously high customer satisfaction. Within the year the partnership has experienced 2-3x the order volume vs the initial pilot phase.

Just Eat Takeaway.com is making strides to drive awareness of on-demand in a variety of other categories. As awareness continues to grow, there is only going to be more appetite for on-demand delivery of a variety of product categories.

Sales spikes experienced by the partnership, achieved through special marketing initiatives

15x

“

[It was a] very positive experience. The article was there in just under 20 minutes. Convenient and easy and quick help.

Just Eat Takeaway.com on-demand electronics customer, Female, 55-64, Germany



03 Opening up purchase occasions

Each product category caters towards a range of ordering moments and missions, helping shoppers get the items they need and want in the most convenient way. There is clearly appetite to shop on-demand. Our analysis shows that certain categories have a stronger affinity for specific order occasions.

Some of these are an addition to the range of order occasions that we have already seen serve on-demand grocery delivery. The introduction of more product categories into the on-demand ecosystem will fundamentally increase the range of occasions that on-demand fits into everyday lives. It's the ultimate view of everyday convenience.

Emergency

Delivering in the moments you need it most

Pharmacy, petcare and baby care are all verticals that lean towards emergency order moments. For instance, a mother is home alone with her baby and realises she's run out of nappies. Or a partygoer wakes up with a hangover. Urgency and speed of delivery is at a premium. While urgency order occasions are prominent for on-demand grocery too, these categories will help grow the range of emergency moments on-demand can cater to.

77%

of Speed Seekers agree that on-demand will ensure that if I forget something important, it can be ordered to me in a matter of moments

UK 80% | NL 75% | DE 73% | ES 80%

Treating

Indulging yourself and others

Categories such as beauty, clothing and flowers have a greater affinity with treating order missions. Whether that is ordering a gift for a loved one or with a special event in mind, these verticals lean towards indulgence and more luxurious moments. This opens up a whole new range of occasions where on-demand could play a role in people's lives, and the more luxurious element to treating and gifting could prove to be economically lucrative too.

75%

of Speed Seekers agree that on-demand will make it easier than ever to send meaningful surprises and gifts to our loved ones in real-time

UK 77% | NL 69% | DE 72% | ES 79%

Unexpected breakage

Helping you to react to the unplanned

DIY items, gardening supplies, electronics and appliances all sit within an ordering space centred around inconvenient product breakage. Just when you've decided to do some home DIY, a key tool breaks! As product categories that rely on reliability, having a backup option is vital for the majority of households. On-demand will be increasing the range of occasions where it can be an everyday lifesaver.

1 in 3

of Speed seekers say they will rely on on-demand delivery if an electronics, DIY item, gardening item or household appliance breaks

UK 36% | NL 37% | DE 33% | ES 34%

The highstreet in your pocket

There is a clearly a wealth of consumer-led data readily available that signposts where the category will go next. This paper brings to the fore just a snapshot of the data points that are signalling industry change. The next step is to make this a reality, where on-demand delivery of all types of products is the norm.

Shoppers are looking to food delivery aggregators to deliver this next phase of the Rapid Evolution. Consumers can't wait to have all the products they could ever want under one digital roof. With the physical highstreet in constant decline, the switch is clear - the highstreet will fit neatly in your pocket.

Brands like Just Eat Takeaway.com are perfectly positioned to deliver on this vision. They already deliver everyday convenience to millions of people on a daily basis across the world. They know the vital ingredients required to lead sectors and grow user bases, all while ensuring on-demand delivery is a sustainable and profitable business for their retail partners.

Shoppers are looking to Just Eat Takeaway.com for the future of on-demand delivery

81%

of Speed Seekers are excited to order different categories through Just Eat Takeaway.com for on-demand delivery

UK 78% | NL 79% | DE 84% | ES 83%

75%

of Pacey Prospects are excited to order different categories through Just Eat Takeaway.com for on-demand delivery

UK 68% | NL 75% | DE 81% | ES 76%



In conversation with...



Matt Hood,
Managing Director
at Co-op Food

Question: *Tell me about how quick grocery delivery works for your business?*

Matt's answer: Covid showed us that our quick commerce trial was something our customers wanted and it has grown exponentially since. As a convenience store operator our ambition wasn't to get involved in the standard e-commerce market of big baskets and slots for later in the week. Our desire is to make convenience more convenient.

With more convenience shops in the UK than anyone else we are closer to our communities with an unrivalled ability to execute properly quick-commerce. Over 80% of the UK is covered, mostly with delivery around 20 mins, so we can cement our position.

Question: *Our survey found that on-demand grocery consumers want a wide choice of stores but also their local favourite shops. Does this balance explain why previous entrants have struggled?*

Matt's answer: The Co-op is seen as a "community" retailer, a business that is owned by our members – this enables us to balance the breadth and proposition requirements of our customers with 'local ness' and community spirit. The reason many quick commerce startups failed was because our stores make our last mile costs much lower and give us insights into what our customers want to buy.

Question: *We found that most consumers see quick groceries as additional to in-store, rather than replacing in-store. So an opportunity for stores like yours that are offering the service, not a threat to those that aren't. Is that how you see it?*

Matt's answer: Definitely – I was always worried that our quick commerce business would just steal from our existing in store customers, and with this route to market being less profitable than a customer walking into store that was a risk. However, we have been pleased to see the really high incrementality of these customers. So it is a huge opportunity rather than a risk. We have around 17 million transactions

every week – probably second in the UK – but still believe quick-commerce can be one of the main vehicles to grow penetration even further.

Covid accelerated customers becoming digitally comfortable – especially older customers. This behaviour has stuck and customers now want not just convenience but immediacy too.

Question: *And where do you see on-demand delivery sitting in relation to other shopping channels your business offers? (e.g. in-store, scheduled delivery etc)?*

Matt's answer: Our 2,500 stores can act as mini depots: a major advantage. Quick-commerce helps cover the costs of running the shop and makes them more profitable: in some shops quick commerce is over 20% of sales. Our teams have developed the most efficient store hours model, and as quick-commerce grows as a percentage of sales we may need to innovate store layouts.

Question: *Our research measured eight separate shopping 'missions' that drive quick grocery purchases. Half are occasional emergencies and others are about normal grocery shopping. How do you see consumer missions changing?*

Matt's answer: What's really pleasing is the balance of the missions you outline above. Naturally many people use the service for emergencies and things they have forgotten, the same as how they treat many of our physical stores. However the bigger opportunity is to grow the percentage of missions with a fuller basket. In our physical shops we have grown our fresh foods business to 50% of sales, the typical convenience fresh percentage is less than half of this and ten years ago would have been even less.

Shopping conveniently helps customers to manage their spend and food waste. However shopping conveniently has come with a stigma of being more expensive. We have done a huge amount of work to reduce this premium and our partners can help with this value messaging.

Question: *Looking ahead to the next 10 years – what do you think the role of on-demand rapid delivery will be for your business and for customers?*

Matt's answer: All of our analysis is that the quick-commerce market will continue to grow. Despite the cost of living crisis, customers have busy lives that this service caters for. E-commerce expectations are changing and we want to be at the forefront of this. My ambition is for us to be 35-40 of the UK quick commerce market in the next 3 years – we can only do this by working closely over the long term with our partners to innovate, and be curious about how we are at the forefront of this market.

Customers have shown with their actions that quick commerce is an established part of their repertoire but there is so much more we can do to drive penetration, frequency and basket size.



Andrew Kenny,
Chief Commercial Officer
at Just Eat Takeaway.com

Question: *What do you think it is that makes on-demand grocery delivery so valued by consumers? What current trends, market conditions or consumer behaviours have you seen driving the demand for this service?*

Andrew's answer: We're at a time when anyone anywhere can order whatever they want, whenever they want for quick delivery. We saw huge growth in on-demand delivery and a shift in ordering behaviour during Covid. Since then, consumer demands have continued to increase. People expect more convenience, speedy delivery and accuracy, as can be seen from the findings in this report.

At Just Eat Takeaway.com, we're part of our customers' daily lives, and we're using our technology to deliver convenience every day. We know there are a number of factors that continue to drive value for on-demand delivery, from people lacking time to go for a quick shop, while others may find the in-store experience frustrating. So whether a customer needs a pint of milk or a missing ingredient, we're here to take care of it, so that they can spend more time doing the things they want to do.

Question: *How has Just Eat Takeaway.com embraced and pivoted to on-demand grocery delivery, and what do you think it is about your model that means you're well positioned for success when others have struggled?*

Andrew's answer: We've seen huge growth in our logistics offering over the last few years. This means we're well positioned to meet evolving expectations around on-demand convenience by being able to deliver whatever our customers want, whenever they need it, within 20 minutes.

Alongside this, we continue to invest in our technology to improve customer experience and to keep our platform future-proof. This includes rolling out features to make the ordering journey as convenient as possible such as giving customers the option to substitute a replacement item that may not be available when placing a grocery order. We've also made it easier to find retail and grocery options on our homepage so customers can better navigate to the category they are looking for.

Question: *On-demand grocery delivery continues to grow. What do you see as the next big focus areas for Just Eat Takeaway.com, and how will these work within your app and business model?*

Andrew's answer: It's important that we continue to be on the front foot when responding to consumer demand for convenience and choice. Having a consumer-first mindset means we need to understand their expectations for today and tomorrow. This is why we continue to explore new innovations to make the ordering journey relevant and convenient, whether that be through our AI Chatbot or in-car ordering options. Alongside this, it's all about expanding and building the categories we have on the platform. Customers can already order from a large selection of partners through Just Eat Takeaway.com, but in reality, we've only just started to scratch the surface. Our focus is to continue onboarding partners across various verticals from pet care, pharma, toys and flowers. So whatever it is that a customer may need for quick delivery, we'll be here to deliver for you.



What now?

The next steps to make on-demand a reality for your business

Our research shows on-demand delivery is redefining convenience in unprecedented ways. This is not simply a trend. It's a societal shift fuelled by a generation accustomed to instant gratification, with speed no longer a luxury but an expectation. So what should retailers do now?

01 Be part of the evolution

Retailers must make proactive steps to meet the evolving needs of their customers and thrive in an on-demand world, otherwise risk being left behind. Consumers want on-demand. The desire for speed and convenience continues to grow. In this fast-paced landscape, those who dare to innovate and cater to the needs of this new generation of consumer, stand to reap the rewards.

02 Integrate on-demand into your sustainability and inclusivity strategy

Shoppers see a clear link between on-demand delivery and reducing food wastage, with sustainable practices a priority for many. And on-demand offers wider societal benefits in giving people living with disability, or an accessibility need, access to the things they need and want easily. On-demand should be another pillar in the development of sustainable and inclusive business practices.

03 Grow your consumer basket with new, evolved shopping missions

On-demand has opened up new planned and impulsive shopping occasions that didn't traditionally exist. Shopping on-demand isn't cannibalising our regular shop, but rather expanding the basket and driving spend upwards. Targeted strategies to capture shoppers when they are in these missions offer new ways for shoppers to engage with brands and spend more.

04 Make your product range work for on-demand

Aside from groceries, shoppers want the ultimate convenience of on-demand for other categories, from pharmacy to petcare. Consider how non-food categories can succeed in an on-demand environment and the right product mix to maximise shopper consideration.

05 Consider shopper choice dynamics when optimising for on-demand

Shoppers have high expectations for the on-demand experience including delivering on speed promises, the right range of retailers and product offer, navigation and UX, as well as a high-level of customer service. If these are not met, especially in the case of speed, shoppers are less likely to return. Partner with platforms that can deliver the technology and logistics to succeed.

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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Approach

Our methodology

To dive into the world of on-demand delivery, we spoke to 4,000 people in a 15-minute online survey in four markets (UK, Germany, Netherlands and Spain). Most (75%) already used on-demand delivery for groceries, at least once in the last six months – we classify these respondents as Speed Seekers. The others (25%) hadn't used on-demand delivery before, but would be open to trying – we classify these respondents as Pacey Prospects.

Just Eat Takeaway.com also spoke to 30 UK consumers through an online diary, and in-person focus groups to identify consumer needs and chart where on-demand will go in the future.

Please get in touch if you would like to know more about the research and findings in this paper



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About Just Eat Takeaway.com
www.justeattakeaway.com

Just Eat Takeaway.com is a leading global online food delivery marketplace, connecting consumers with over 699,000 partners in 19 countries. Our mission is to empower everyday convenience.



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PA believes in the power of ingenuity to build a positive human future. Our team of 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.