Foodservice Delivery Aggregator Shopper study

Wave 1 – Spring 2024

twc | Harnessing data
Empowering wholesale foodservice & convenience
Research

Introduction to TWC Group

- The data partner to almost **80 UK wholesalers**
- **155 UK FMCG suppliers** use our wholesaler platforms.
- TWC works directly on data consultancy projects with **multiple suppliers**.
- We conduct primary research (consumer, shopper, retailer, foodservice operator) to give clients **THE WHAT** (data) and **THE WHY** (research and insights)
- TWC works exclusively in the UK **Wholesale Sector** – we know (and love!) this sector very well.
- Some of our wholesaler clients (United Wholesale Scotland and Sugro Buying Group) allow their supplier partners to analyse online vs in-depot shipment sales.
- **TWC has never lost a client** (formed in 2012).

Foodservice Delivery Aggregator Study from TWC Group

- Commissioned by Coke (CCEP) and Mars Wrigley.
- Conducted in May / June 2024 (wave 1).
- Intention to conduct additional waves of research this year/early 2025.
- Any supplier can subscribe to any/all waves of research.
- Suppliers can also input their own questions into the project.

The Sample

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

N=3782

Have you used a delivery service in the past 2 weeks?

N (People) = 2000

‘Not used’
Left the survey

In depth questions on
Up to 2 orders
Average 1.4 orders

N (Orders) = 2741

37% made more than 1 order in last 2 weeks

Fieldwork Period
17th to 23rd May 2024

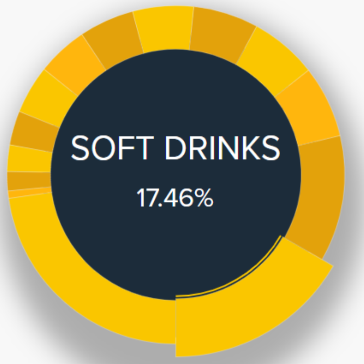
We interviewed Shoppers of:

- Takeaway/Meals AND Groceries
- Delivery AND Collection

Before we look at foodservice delivery aggregator shopper study findings, how is the independent convenience channel performing?

Source: SmartView Convenience (retail epos market read from 5,200 independent convenience stores from TWC & ITG)

CATEGORY	SHARE	SALES TY	SALES LY	CHANGE	
SOFT DRINKS	17.46%	477,561,199	486,682,951	-1.87%	DRILL
CONFECTIONERY	12.50%	341,814,848	369,545,653	-7.50%	DRILL
EDIBLE GROCERY	6.87%	187,945,193	209,993,678	-10.50%	DRILL
TOBACCO	6.38%	174,485,215	208,357,031	-16.26%	DRILL
COMMISSION	6.17%	168,825,846	191,480,360	-11.83%	DRILL
CRISPS SNACKS & NUTS	5.71%	156,181,367	167,729,028	-6.88%	DRILL
CHILLED	5.11%	139,794,603	153,543,402	-8.95%	DRILL
NON EDIBLE GROCERY	4.67%	127,836,179	129,470,105	-1.26%	DRILL
BEER LAGER CIDER	4.41%	120,649,643	122,964,903	-1.88%	DRILL
WINES SPIRITS	2.94%	80,294,153	84,803,602	-5.32%	DRILL
NEWS/MAGAZINES	2.13%	58,197,278	60,857,674	-4.37%	DRILL
FROZEN	1.39%	37,944,444	40,185,279	-5.58%	DRILL
FOOD TO GO	0.15%	4,205,437	3,908,069	7.61%	DRILL
OTHER	24.09%	658,864,819	658,026,917	0.13%	DRILL
TOTAL	100.00%	2,734,600,224	2,887,548,652	-5.30%	



Last 13 weeks volume performance to 19th May 2024

vs 2023 Source: SmartView Convenience

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Usage

The vast majority of UK adults have used a foodservice delivery aggregator

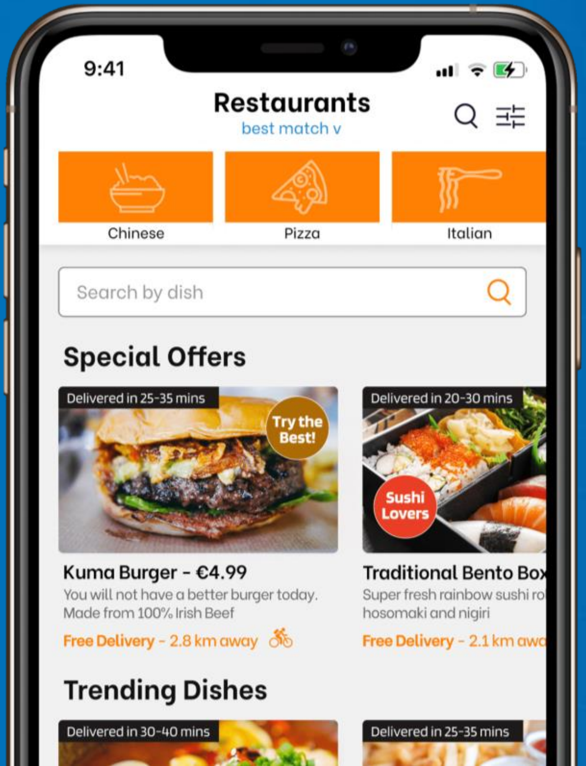
72% have ever used an aggregator

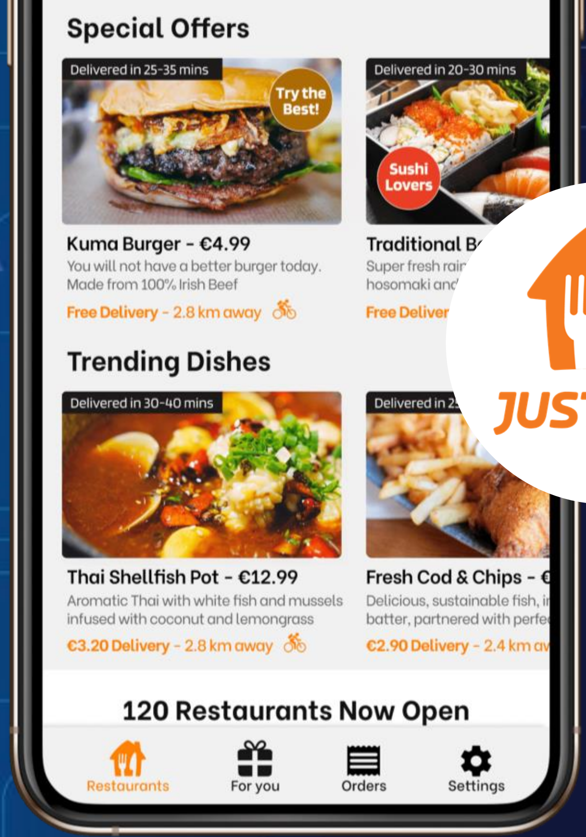
Clear Favourite

Previous usage

Intended future usage

Functionality Wins!

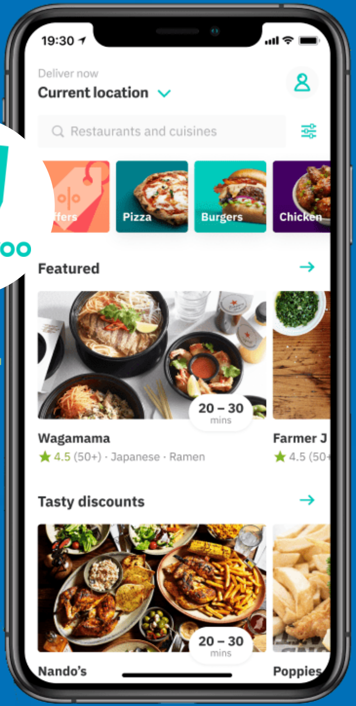


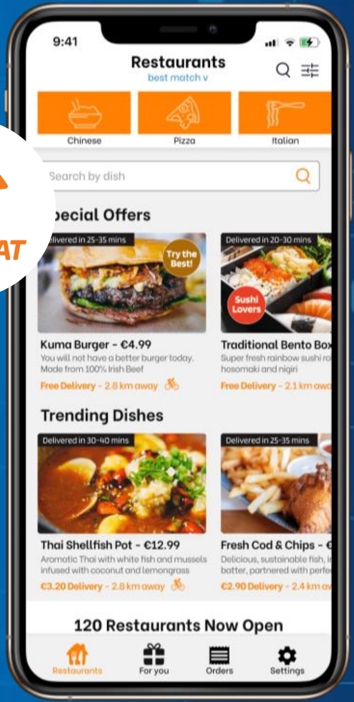


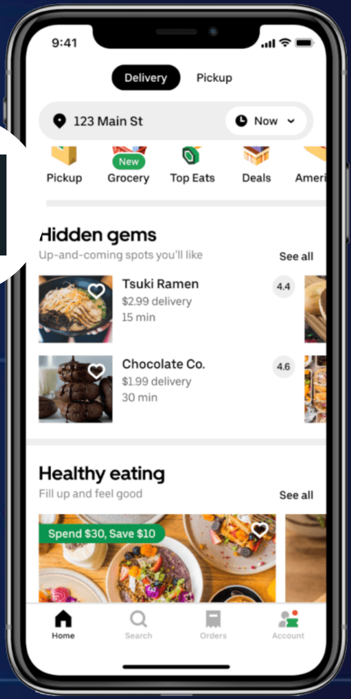
There are multiple reasons for usage – convenience but also reasons associated with brands, delivery fulfilment, price, operators, quality

Most (but not all!) Orders are Made on Apps

This research breaks down orders placed on apps vs desktops







Most Orders are Delivered

Our research breaks down delivered vs collected orders.

Most Orders Include Hot Food

This research has detailed insights on all ‘order-types’.
There is a significant gap between those ordering food and those also ordering other items (eg drinks, snacks, impulse items, treats, desserts)

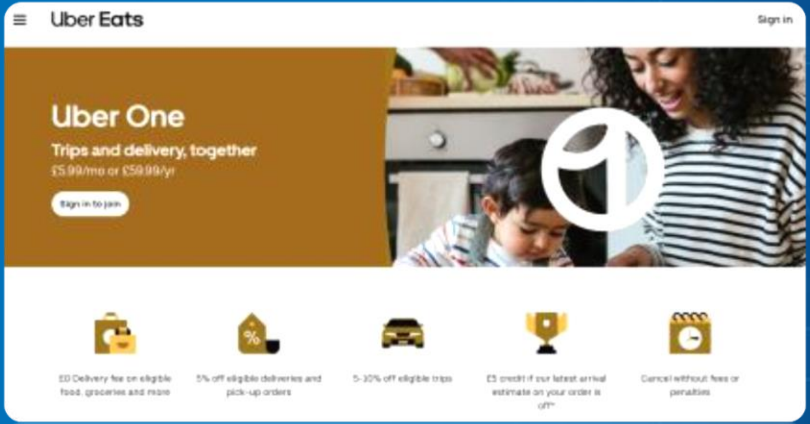
National Chains vs Indies Neck-and-Neck

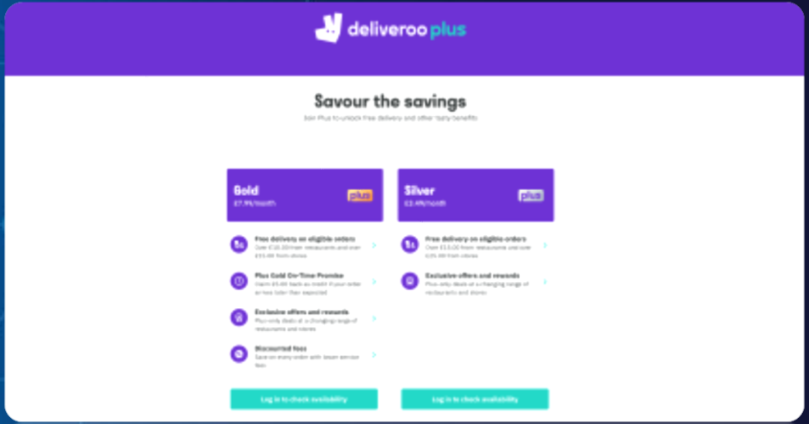
A very high usage of local independent outlets – shoppers aren't only using national/international foodservice brands.

Don’t Think its ALL About Foodservice – It’s Grocery too

Subscriptions appeal

Many shoppers have them (or more than one!)





Many can influence the purchase

eg KIDS!!!

Speak to TWC Group if you want to know more about KIDS

84% **of kids 8-18 receive some sort of income***

- % get money for special occasions

- % receive **weekly** pocket money
- % receive **lunch/snack** money
- % receive a **monthly** amount of pocket money
- % have a part time job

- Average £x pocket money per week

Source: TWC Kids research Jan 24 (Oldest child aged 8 – 18) n=250

Promps Work
(A bit)

We are able to tell you:

- which categories/products are bought most on impulse.
- which operators generate the highest levels on unplanned purchases.

Certainly an Element of Treating / Indulgence

Summary

- There are many learnings for the wholesale channel:
  - Frictionless Shopper Experience (UX)
  - Huge numbers are ordering from local independent outlets (served by wholesalers)
  - Significant learnings/sales growth opportunities when you benchmark feedback by operator
  - Significant sales opportunities with shoppers buying accompanying items in addition to their main food item
- TWC Group will help you quantify the size of online/ecommerce wholesale channel – we work with almost 80 wholesalers.

Thank you

- Full report out in 2-3 weeks to study clients
- Contact me for more information
- Next wave of research planned for next 6+ months
- Huge range of additional research planned for next 12 months

Please contact me if you have any further questions…

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Visit **www.twcgroup.net**

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