



## GO Technology

The latest trends in food delivery—and how restaurants can increase their share of a fast-growing market

GO  
TECHNOLOGY

Insight by Zonal, Powered by CGA

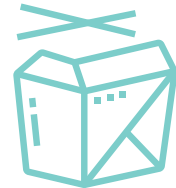
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## FOOD DELIVERY: THE HEADLINE NUMBERS

27.3



MILLION BRITISH CONSUMERS HAVE ORDERED FOOD DELIVERY IN THE LAST SIX MONTHS

28%

OF BRITISH CONSUMERS ARE NOW ORDERING MORE FOOD DELIVERIES THAN A YEAR AGO



70%

OF ORDERS ARE MADE BY JUST 21% OF FREQUENT DELIVERY CONSUMERS



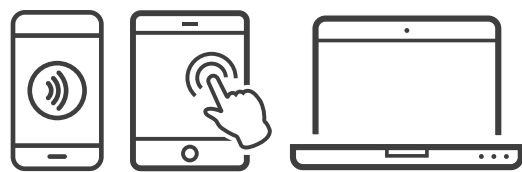
50% OF FOOD DELIVERIES ARE ORDERED BY MILLENNIALS



44% OF CONSUMERS NOW USE ONLINE CHANNELS TO ORDER DELIVERIES



25%



OF CONSUMERS USE THE JUSTEAT APP FOR DELIVERIES, MAKING IT THE LEADING ONLINE PLATFORM—AND A FURTHER 12% WILL CONSIDER USING IT IN THE FUTURE

61%

OF FREQUENT DELIVERY CONSUMERS THINK THE QUALITY OF THE FOOD THEY RECEIVE IS BETTER THAN, OR THE SAME AS, FOOD SERVED IN A RESTAURANT



## SEVEN KEY TRENDS IN FOOD DELIVERY



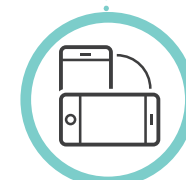
### 1. Delivery is booming

The food delivery market is flourishing in the UK, and all the signs are that it will continue to do so. With people leading busier and more hectic lives, the convenience of getting a delivery straight to the home, office or even hotel has become part of everyday life. Branded restaurants are understandably keen to get in on the action by extending the loyalty they enjoy on the high street into people's own homes.



### 2. Online technology is driving growth...

The rising take-up of delivery is being driven by third-party technology facilitators like JustEat, Deliveroo and UberEats, which allow consumers to order food with a touch or swipe of a screen. Branded restaurants have adopted technology to ease their operational delivery too, and some have moved to a model of standalone production kitchens in high-demand areas.



### 3. But many consumers still prefer the traditional telephone

While 44% of consumers now use online channels to order delivery, the majority—56%—still use the phone. And this method is clearly still preferred and trusted by many people. Of those using the phone, 90% are satisfied with their experience—ahead of the satisfaction ratings of consumers using websites (84%) and apps (82%).



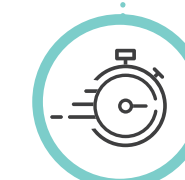
### 4. London is the epicentre of food delivery

It's not surprising to find that the UK's capital is at the core of the delivery boom. GO Technology data shows that nearly twice as many Londoners are ordering deliveries weekly compared to consumers in the rest of the country—and 37% say they have increased their usage over the past year.



### 5. Big brands have big opportunities

Consumers name Pizza Hut, PizzaExpress and Nando's as the three brands they would most likely consider for delivery. Brands with high awareness levels on the high street clearly have a head start in delivery. Of course, the flip side of the opportunity is that delivery can jeopardise brands' core eat-in business. The big target is to acquire new consumers who don't eat-in, while maintaining frequency of visit among brand loyalists.



### 6. There's a need for speed

What can restaurants do to improve their deliveries? GO Technology research shows that speed is essential. Two in five (43%) consumers say they would like to see faster delivery, which puts it at the top of their wish lists for improvements, followed by better temperature of food (36%) and cost (34%).



### 7. Restaurants have room for improvement

Beyond speeding up delivery, there are opportunities for all restaurants to improve the efficiency and quality of their service. And the rewards on offer are huge, with 39% of consumers saying they would order more food for delivery from high-street restaurants if improvements are made.



# THE FUTURE OF RESTAURANT DELIVERY

## Where will technology in the food delivery sector head next?

Research from CGA's panel for GO Technology reveals some fascinating opinions from the people who really matter: consumers.

### Own-website delivery

**40%** of consumers think more restaurants will start offering delivery direct from their own websites—which are also seen as the best source of information about delivery. By comparison, only **29%** predict growth in mobile delivery apps. That highlights the urgent need for restaurant brands to invest in their own technology, or risk falling behind the curve.

### GPS tracking

Consumers want to know how long their delivery will take—and tracking technology gives them the answer. A third (**33%**) of consumers predict GPS-based trackers will play a bigger part in delivery going forward.

### Voice ordering

With devices like Siri or Alexa becoming increasingly popular in people's homes, voice-based ordering could be the next big thing in delivery. A fifth (**22%**) of consumers think it will become more common.

### Cook-it-yourself

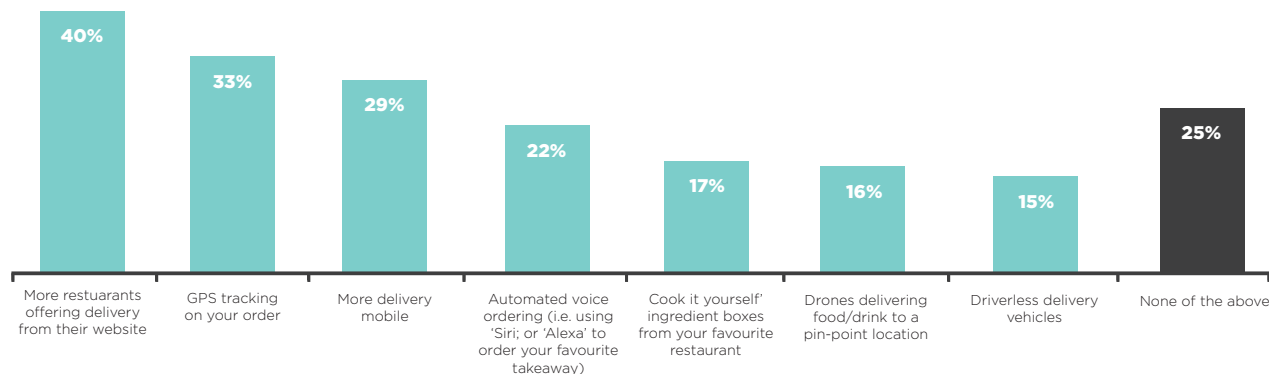
Around one in six (**17%**) consumers expect advances in the delivery of boxes of ingredients from restaurants, ready to assemble at home.

### Driverless delivery

The days of interaction-free delivery might not be far off. Small but significant numbers of consumers predict advances in drone delivery (**16%**) or driverless-vehicle delivery (**15%**) technology.

## 40% of consumers predict more restaurants will offer delivery from their website

### Technology advances in food delivery consumers think they will see in the future



## The view from CGA

"Delivery has changed wholesale in the last few years: firstly, with the advent of ordering platforms such as JustEat, and subsequently with facilitators such as Deliveroo providing a solution that is geared towards the customer and restaurant industry alike.

"But delivery doesn't come without its challenges. Operators who want to exploit this huge opportunity should do so with the needs of the consumer at the forefront of their minds, and invest in the processes and systems that can best serve their customers. Building a great service enhances brands and offering home delivery can open up a whole new customer base away from the high street. However, poor operational execution will see customers go elsewhere and damage the hard-earned brand reputation across all channels."

*Karl Chessell, CGA Business Unit Director, Retail and Food*

## The view from Zonal

"Our latest GO Technology report demonstrates how technology is changing the way we conduct our lives, and the traditional way of doing things has gone out the window. Restaurant brands need to keep pace with that of change if they are to stay relevant to demanding consumers, for whom loyalty is often a thing of the past.

"As this report makes clear, food delivery is here to stay, and it is set to rise in popularity even further. So, with competition on the high street as tough as ever, it pays for restaurant brands to invest in their operational and technology infrastructure now, in order to capitalise on the opportunity that home delivery brings to drive additional revenue and meet consumers' expectations."

*Clive Consterdine, Zonal Sales and Marketing Director*