



Tech & Delivery Battles: How Brizo FoodMetrics brings clarity to the UK foodservice delivery sector

Written by Peter Backman



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Introduction

I've been looking at data from Brizo FoodMetrics which provides an enormous amount of detailed evidence about the UK foodservice market. In this white paper, I'd like to explore a variety of delivery-related issues notably the number of platforms that foodservice operators partner with and some learnings from the US restaurant delivery scene.

And, later on, I provide a short section on Brizo, their information, and how to use it.





! **60%**
of UK Chain locations list on at least one third-party marketplace (vs only 44% of independents)

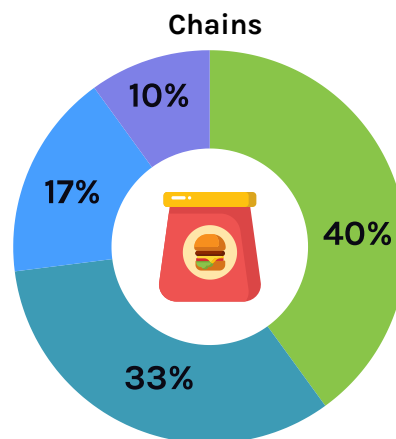
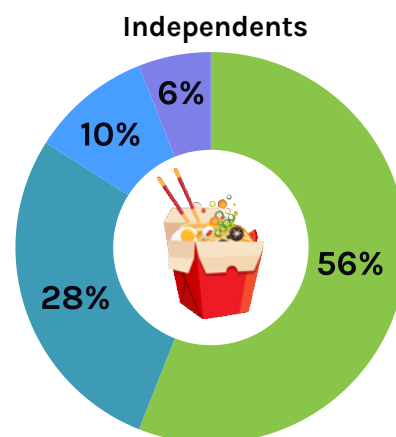
Chains and independents: different perspectives

Brizo reveals that 93,000 pubs and restaurant outlets are on Deliveroo, 74,000 are on Just Eat, and 70,000 are on UberEats.

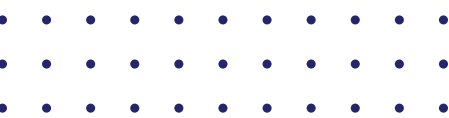
But what struck me as particularly significant is how these relative figures differ from each platform's GTV (or Gross Transaction Value - that's sales to consumers). Just Eat's UK sales are a third higher than Deliveroo's, yet its establishment count is 20% lower. The marketplace listing data revealed by Brizo implies that Just Eat achieves higher average sales per establishment.

My analysis of Brizo's data also shows that despite the surge in delivery over recent years, this behaviour still varies significantly between chains and independents. While 60% of chain operators in the UK list on at least one third-party delivery marketplace, the figure for independents is much lower at 44%.

And among those chain establishments listed on any delivery platform, 33% are only on one, while almost the same proportion (27%) are on multiple platforms: 17% are on two, and 10% are on three (or more).



UK foodservice establishments by how many third-party marketplaces they are listed on.
Source: Brizo FoodMetrics, August 2024





The rise of multi-platform listings

These insights reflect a change from the early delivery model that restricted restaurants to single-platform exclusivity. Now, as the balance of power between delivery platforms and their larger partners shifts, foodservice operators are more likely to choose to list across multiple platforms.

And it also raises the question of why independents are less likely than chains to do delivery, and if they do, why are they more likely to use just one platform? Of those independents participating in the delivery market, about 64% of them list on a single platform, versus 55% of chains.

The reason may have to do with efficiency and operational costs. Using multiple platforms means complexity around incoming orders and accounting processes – especially more tablets and additional tech integration. An independent operator may choose the lowest commission rate and stick to one platform for simplicity's sake, while a large chain has more resources and negotiating power to manage multiple delivery partners across its locations.

I want to finish this white paper by taking a look at a recent significant development in the US foodservice market – but before I do that, I should explain some things about Brizo.



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Why Brizo FoodMetrics? A new perspective on foodservice

I've become a huge fan of Brizo because it is a company that takes a unique approach to navigating the complex restaurant sector. And now that they have joined my roster as a client, I'm delighted that they have allowed me to share some of their insightful data with you.

Their core offering is rooted in collecting and analysing publicly available information about foodservice establishments. That market data is then made available to search, filter and visualise within a handy platform. By drawing data directly from online platforms where businesses create and manage their own profiles, Brizo provides a comprehensive view of the market that reflects how operators define and present themselves.

This approach is powerful precisely because it offers suppliers across food, beverage, tech, and financial services detailed insights based on the way operators choose to represent their businesses, rather than relying on imposed external classifications. It captures the authentic market positions of foodservice establishments defined by the operators themselves.



Filters Applied:

- UK or IE
- Greater London
- Listed on Deliveroo
- British Cuisine

Harvester

Marketplace	Median Menu Item Price
Deliveroo	£8.00 (€6-£16)
Just Eat	£7.00 (€6-£16)
Uber Eats	£9.00 (€6-£16)

Technology Vendors

Vendor	Count
Deliveroo	80
Squarespace	42
Stripe	17
ResDiary	92

Crown & Lion

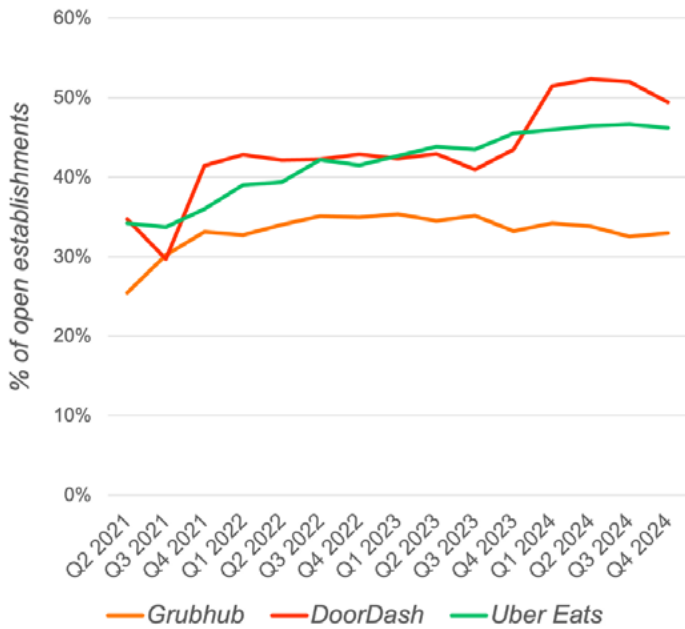
- 80+3, 42+17, 92
- 4.6 ★★★★★ (1.2K reviews)
- Restaurant, Drinking Place • British
- £12-£36
- 258 High Street North, London, UK E12 6SB
- Daily 11am-11pm
- +44 20 8430 8795
- crowndlion.co.uk
- Ian Wright, Business Owner
- Maria Provencher, Restaurant Manager

For tech companies, Brizo's data reveals which specific technologies each operator uses, offering precise targets for sales and partnerships. For food suppliers, it includes information on menus, pricing, locations, contacts, and much more - all categorised according to how operators describe their establishments, giving suppliers the opportunity to connect meaningfully with the right prospects.

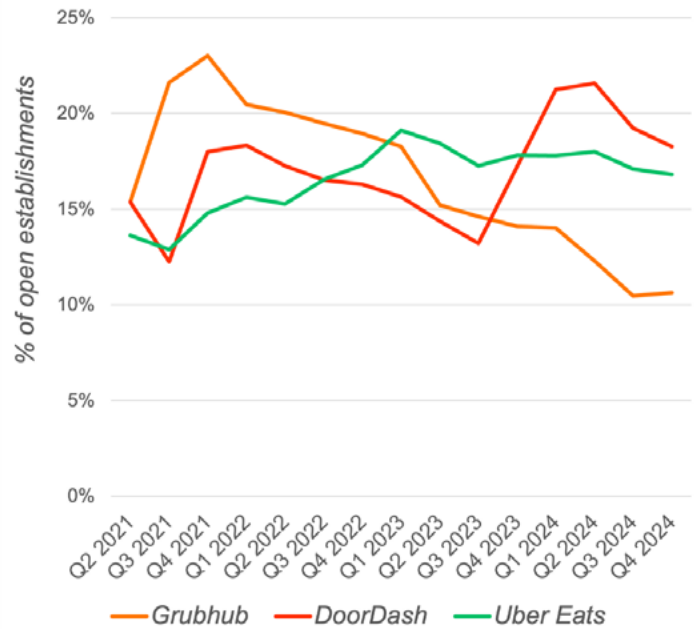
By reporting what is available online and reflecting operators' self-defined profiles, Brizo's approach delivers invaluable unique insights for sales prospecting, market planning, and strategic decision-making.



Quarterly Average of 3PD Penetration Among **US Chains**



Quarterly Average of 3PD Penetration Among **US Independents**



Brizo FoodMetrics, Nov 2024

What can the UK learn from the US market?

I'd like to finish by taking another tack on the use of Brizo's insights, For years I've tracked developments in the US foodservice market. While its influence on the UK isn't quite what it once was, the trends there still provide valuable insight into what may lie ahead for us.

So what does Brizo have to say on perhaps the most significant news to arise from the US restaurant delivery market in recent months - the sale by Just Eat Takeaway of its US business, Grubhub, to Wonder? theDelivery.World discussed the implications of this in a recent issue - and Brizo have written an enlightening article based on their historical data on the US market.





According to **Brizo's report**, 'Grubhub was the vendor of choice for independents between mid-2021 to the end of 2022, at which point their market penetration in this segment took a nose dive and never recovered. For chains, meanwhile, Grubhub lagged behind UberEats and DoorDash since 2021, though their performance in this segment has been more stable over the last couple of years compared to the significant drop seen with independents.'

These insights clearly demonstrate the weakening competitive position of Grubhub and highlight why JET were eager to conclude a sale of the US business.

Why Brizo's insights are invaluable for the UK foodservice industry

In this short piece, I've only had the chance to scratch the surface of what lies within Brizo's data but at least I've been able to unearth the fact that Just Eat's UK turnover per establishment is higher than the turnover its competitors can achieve, that chain operators are much more likely to be listed on a delivery platform than their independent competitors, and that the early-stage platform model of restaurants listing on a single platform has been substantially eroded. But, and here is perhaps the most crucial thing, Brizo's data not only reveals what is going on in the foodservice sector, it provides ways to identify individual businesses that are making the changes, who to connect with - at the head office or establishment level - and how to communicate with them.

Given the extensive growth in restaurant delivery, along with a lack of reliable and meaningful data, Brizo brings much-needed clarity to how the market functions. As the market continues to evolve, Brizo's insights will only grow more invaluable.

Brizo FoodMetrics equips industry leaders with the actionable foodservice data and insights needed to make informed decisions based on facts, not hunches. Unlock full market visibility, scale business growth, and streamline workflows with large-scale, granular, and up-to-date market intelligence covering over 2.1 million establishments.

To learn more visit brizodata.com

Peter Backman is a long-term foodservice sector guru and founder of **theDelivery.World**, a platform that connects the delivery sector and makes sense of the myriad changes and challenges that affect the sector across the globe.