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2026
Case Study



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Agencies
Uber + Special

Client
Uber Eats

Title
How Uber Eats Embraced "Almost" to Become an "Anything" Delivery Brand.

Category
B20b. Long-Term Effects - Services/Retail

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Q1. EXECUTIVE SUMMARY & WHY DOES THIS CASE DESERVE AN AWARD?

"The short pays off now, the long pays off after I've been fired." - Confessions of a CMO Report, 2026 (S1).

Sadly, this corporate reality has trapped the marketing industry into a 'death spiral' of short-termism, where average budget splits now systematically starve long-term equity building to as little as 20% of spend (S2).

Against this backdrop, Uber Eats' *"The short pays off now, the long pays off after I've been fired." - Confessions of a CMO Report, 2026.*

Sadly, this corporate reality has trapped the marketing industry into a 'death spiral' of short-termism, where average budget splits now systematically starve long-term equity building to as little as 20% of spend (IPA data).

Against this backdrop, Uber Eats unwavering commitment to long-term brand-building is a rare act of strategic bravery. While others chase fleeting spikes, they've spent the past decade investing in long-term, creatively disruptive brand marketing to fuel sustained commercial growth - converting a tech company culture into brand-building evangelists along the way.

Yet in 2022, that conviction faced its greatest test.

For six years, the 'Tonight, I'll Be Eating...' campaign had helped transform Uber Eats from a fourth-to-market challenger into Australia's leading food delivery app. But after a post-COVID boom, growth dropped to all-time lows, signaling that future expansion could no longer come from delivering restaurant-food alone. The next horizon? Scaling rapid delivery to 'anything', starting with grocery.

This created a new challenge: how do you reap the benefits of consistency when your food brand pivots to delivering suncream, bleach and toilet paper?

Many brands would have responded by rebuilding from scratch for an entirely new category.

Uber Eats chose a harder path to get right: evolving the brand's positioning through a new campaign idea, whilst retaining the same strategic DNA that had made it famously - and consistently - effective.

The resulting brand idea, 'Get Almost *Almost* Anything', expanded the meaning of Uber Eats from a place to get whatever you want for dinner, to a place to get *whatever you want, whenever you want it.* By humorously highlighting what the brand *can't* deliver, they set out to normalise the perceived indulgence of on-demand delivery for everyday retail essentials.

The results didn't just represent a simple category extension, but a full brand transformation that fuelled growth on two fronts. Over three years, the campaign reversed 'slowth', expanded grocery adoption at scale, strengthened distinctive brand assets, grew market share, and unlocked a new wave of growth for Uber Eats' legacy restaurant-food delivery business.

All resulting in **+24% incremental revenue above baseline growth**, **+13% market-share and a Profit ROI of 293%**, surpassing targets and outperforming 'Tonight, I'll be eating....'.

Proving that the long really can pay off big for brands that are willing to bet on it.

SOURCES:

S1: Worldwide Partners & The CMO Show Podcast, Confessions of a CMO Report (Jan, 2026).

S2: The IPA, Les Binet & Will Davis, Go Big or Go home (May, 2026); Deloitte & The AMA, The CMO Survey / Department of Creative Affairs (DCA) Analysis: 'The Death Spiral' (April, 2026).

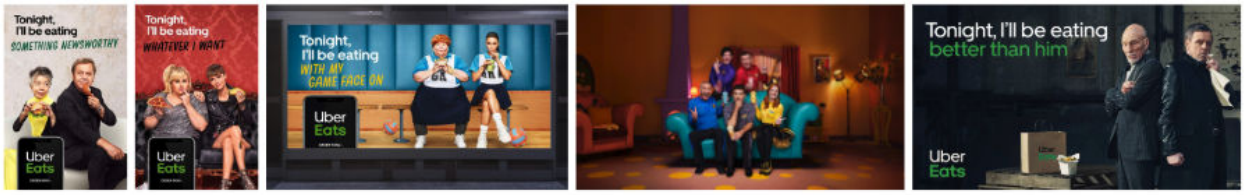
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Q2. WHAT WAS THE STRATEGIC COMMUNICATIONS CHALLENGE?

A CATEGORY LEADER TRAPPED BY ITS OWN SUCCESS.

Between 2017–2022, Uber Eats grew from fourth-to-market challenger to Australia's most valuable online food delivery brand. Six years of investment in 'Tonight, I'll be eating...' made it synonymous with on-demand dinner delivery, building distinctive assets, driving sustained growth and winning a Grand Effie in 2022.

Assorted 'Tonight I'll Be Eating...' Campaigns 2016 - 2022.



A MATURE CATEGORY EXPERIENCING 'SLOWTH' (SLOWING GROWTH).

Australia's on-demand–food delivery category had matured to $1.82BN (S2). But - after rapid growth in the category's early years - signs of 'slowth' were already emerging in 2019. COVID lockdowns temporarily reignited growth. Yet this surge proved unsustainable. As restrictions eased, growth dropped to record lows.

A BUSINESS PIVOT TO SECURE NEW SOURCES OF GROWTH

Future growth could no longer come solely from restaurant-food delivery occasions. The next horizon? Expanding Uber Eats' 'rapid delivery' capabilities far beyond this, to eventually become the destination for all food and retail delivery. In early 2022, Uber Eats began rolling out its new offering, starting with grocery (S3).

A WHOLE NEW SET OF COMPETITORS.

In restaurant-food delivery, Uber Eats was the established #1 brand. In grocery delivery, Uber Eats was entering as a challenger again, competing not just with other delivery apps, but with established retail giants (Woolworths, Coles and Amazon), who were scaling their own rapid-delivery services (S4,5).

Uber Eats Expanded Competitive Set In New Delivery Verticals.

	Young S/Dinks	Mid S/Dinks	Young Parent Families	Older Parent Families	Older S/Dinks + Empty Nesters
Takeaway Delivery # 1 Brand	Uber Eats	Uber Eats	Uber Eats	Uber Eats	Uber Eats
Over-Indexing Brands	DoorDash, deliveroo, Menulog	DoorDash, Menulog			
Grocery Delivery # 1 Brand	woolworths	woolworths	woolworths	woolworths	woolworths
Over-Indexing Brands	Uber Eats, DoorDash, ALDI, IGA		DoorDash, ALDI, Amazon Fresh		
Alcohol Delivery # 1 Brand	Uber Eats	Dan Murphy's	Dan Murphy's	Dan Murphy's	BWS
Over-Indexing Brands	Uber Eats	naked!	Uber Eats, Cellarbrations, ebay	Cellarbrations	

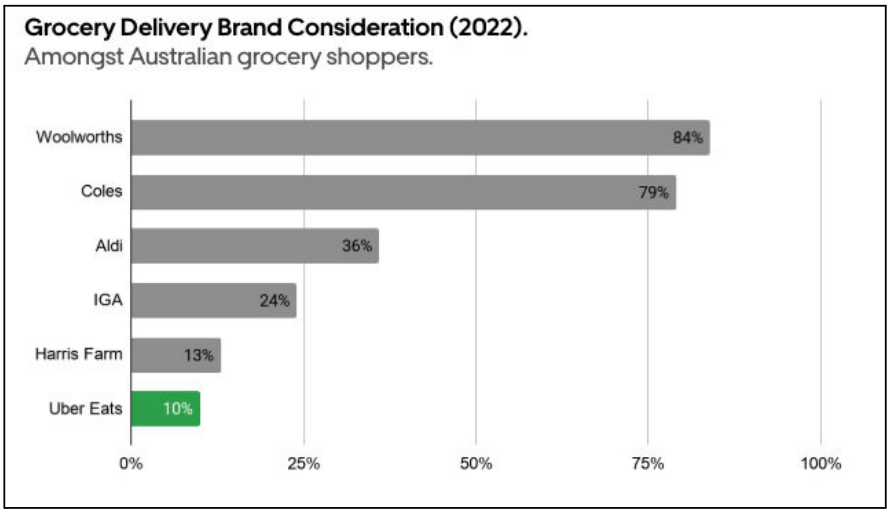
Source: FiftyFive5, On Demand Delivery - Australia Segmentation (Feb, 2022)

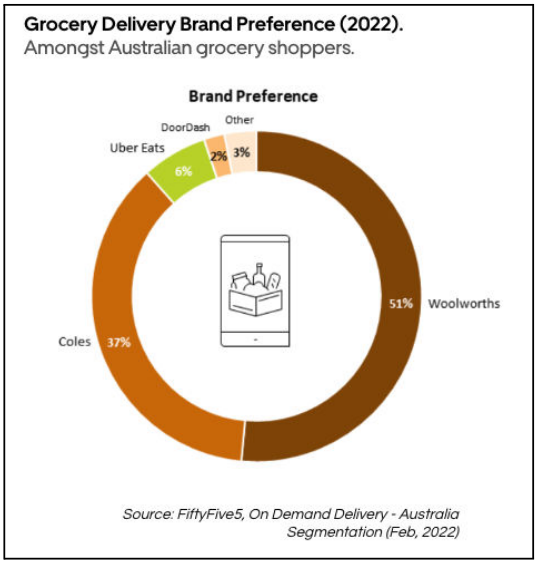
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THE UBER EATS BRAND WAS NOT YET EQUIPPED TO COMPETE IN GROCERY.

Despite Uber Eats' leadership in restaurant-food delivery, the brand was far less associated with grocery shopping, having just 10% brand consideration and 6% preference - significantly behind Woolworths (84%, 51%) and Coles (79%, 37%) (S6).

Simply put - Uber Eats was not considered a 'grocery brand'.





THIS WAS COMPOUNDED BY PRODUCT GROWING PAINS.

Early grocery trials on Uber Eats were limited in range and more expensive than in-store prices. Meanwhile, competitors were gaining large-scale supermarket integrations (e.g. Coles on Doordash), offering price-parity and greater range.

EVEN WITH HEAVY UBER EATS USERS, ON-DEMAND GROCERY ADOPTION WAS LOW.

While everyone was eating Uber Eats for dinner, they certainly weren't ordering groceries. By the end of 2022, just 12% of the brand's most-frequent 'monthly active users' had tried it (S7). This was despite having added 10,770 new grocery and retail storefronts over the year, backed by a concerted owned-channel, cross-sales, and promotional push (S8).

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THE BUSINESS HAD OUTGROWN THE BRAND.

It was clear that scaling grocery adoption would require a more fundamental shift in brand equity, which remained strongly anchored in 'dinner'..

Yet this created a tension.

The campaign that had helped make Uber Eats so successful was no longer able to support where the business was going. So just as the team were celebrating their Grand Effie victory for 'Tonight, I'll be eating...', discussions were already underway about retiring the platform.

A BRAND EQUITY RISK.

Sunsetting the 'Tonight, I'll be eating...' campaign carried significant brand risk. By 2022, it had built some of Uber Eats' strongest distinctive brand assets (DBAs), including the catchphrase itself, which Ehrenberg-Bass identified as its most famous. Without it, the brand could slide backwards in brand strength and mental availability (S9).

GROWTH INTO GROCERY COULD NOT COME AT THE EXPENSE OF UBER EAT'S CORE RESTAURANT-FOOD DELIVERY BUSINESS.

Expanding into new retail verticals could not come at the expense of the restaurant-food delivery business, which drove the majority of existing revenue. The challenge was to defend leadership here, while growing grocery share against larger incumbents.

TO MAKE MATTERS MORE CHALLENGING, RESTAURANT-FOOD DELIVERY MENTAL MODELS WERE AT ODDS WITH HOW PEOPLE CURRENTLY SHOPPED FOR GROCERIES.

Restaurant-food delivery is an emotionally driven impulse purchase triggered by cravings, indulgence, and reward. This is where Uber Eats' current equity squarely sat - a way to 'treat' yourself. Grocery, however, is far more rational; control, fuel, and replenishment are the dominant need-states (S10).

Category Need-States - Takeaway, Grocery, Alcohol.

	REWARDED	IN CONTROL	FUN	FUEL	CONNECTED	SPECIAL
Size	26%	21%	16%	14%	14%	9%
Key Verticals	Takeaway	Grocery	Alcohol Takeaway	Grocery Takeaway	Alcohol Takeaway	Alcohol
What triggered this occasion?	I wanted an **easy** dinner option & **couldn't be bothered cooking** I had a **craving** for certain foods	I wanted to purchase groceries for the **next week or two** I wanted to **re-stock** my pantry and general items	I wanted alcohol to **consume that day** I was **bored** and wanted something to look forward to	I wanted to purchase groceries for the **next week or two** I was in a **rush** and needed something **quick**	I wanted to purchase alcohol for a **special event** or as a **gift** I wanted to **provide** food for my group of **friends / family**	I had **run out** of alcohol
What do we need?	Low delivery **fees** Food arrives **fresh** & in good condition Orders are reliably delivered **on time**	Low delivery **fees** **Easy** ordering process **Easy** to browse/navigate options Ability to **schedule** delivery	Offers good **promotions** A brand I **trust** Good customer **service**	**Easy** to browse / navigate options	Orders delivered **quickly**	Great **loyalty** program A brand that supports **local businesses** Ability to **bundle orders** from different places
Who are we buying for?	**Myself** and my **partner**	**Myself** and my **family**	**Myself**, my **partner** and my **friends**	**Myself**	My **friends** and **family** members	**Myself** and my **partner**
When do I need it?	Within the hour (87%) Within the day (7%) Longer (6%)	Within the hour (42%) Within the day (22%) Longer (36%)	Within the hour **(68%)** Within the day (20%) Longer (12%)	Within the hour **(67%)** Within the day (15%) Longer (17%)	Within the hour **(71%)** Within the day (19%) Longer (10%)	Within the hour **(67%)** Within the day (22%) Longer (11%)
SUMMARY	I want to **satisfy** a food **craving** with an **easy**, **fast** and **reliable** service.	I want to **build up** my **grocery stockpile** with an **easy to use** and **flexible** service.	I want to inject some **fun** into a **social occasion** with some **food** and **drink delivered** from a **trusted** brand.	I need a **quick** and **easy** service for a **fuelling snack / meal**.	I want to **provide food** and **drink** for my **friends and family**, **fast**.	I want something **special** for **me** and my **significant other** from a **range** of **local places**.

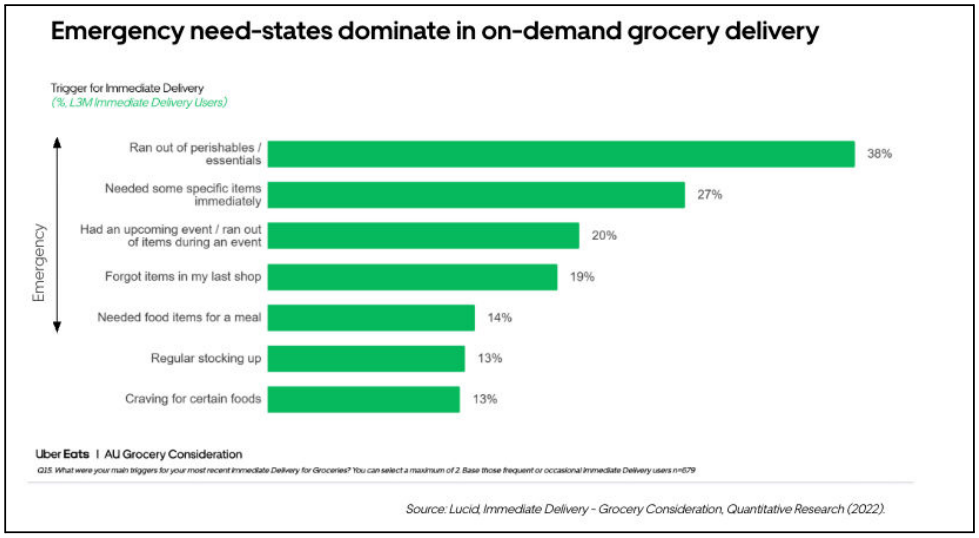
Over-index = >120 | Under-index = <80

Takeaway needstate (indulgence/reward) - where Uber Eats brand currently sits.

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Crucially, the more urgently grocery items are required, the more it becomes a distress purchase, with 'emergency' being the top use case for on-demand (S11).

These need-states felt very far apart, and yet our repositioned brand would need to bridge them both.



THE STRATEGIC CHALLENGE:

Reposition a category-defining restaurant-food delivery brand, into an "everything" delivery brand... without losing what made it successful.

SOURCES:

S1: Stastica, Australian Food Delivery category value (2022).

S2: Uber Eats, Annual Revenue Growth, 2017 - 2022.

S3: Uber Eats internal business reporting. Grocery & Retail launched nationally in Australia in January 2022.

S4: Fiftyfive5, On-Demand Delivery – Australia Segmentation Study (Feb 2022).

S5: Woolworths Group acquisition of Milkrun (2023); Amazon Australia same-day delivery expansion; Coles Rapid Delivery partnership announcements (2022–2023).

S6: Fiftyfive5, On-Demand Delivery – Australia Segmentation Study (Feb 2022).

S7: Uber Eats, Monthly Active Users & Grocery Penetration (Dec, 2022).

S8: Uber Eats internal data, 2022: Grocery & Retail availability expanded by 10,770 storefronts.

S9: Ehrenberg-Bass Institute Australia, Uber Eats Distinctive Brand Asset Tracking (2021–2022), including Fame and Uniqueness measures for core brand assets.

S10: Fiftyfive5, On-Demand Delivery – Australia Segmentation Study (Feb 2022).

S11: Lucid, Immediate Delivery - Grocery Consideration, Quantitative Research (2022).

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Q3. WHAT WERE YOUR OBJECTIVES? State specific goals.

HELP DEFINE A NEW ERA FOR THE BRAND.

To restore growth, Uber Eats needed to reposition from a restaurant-food delivery app to an 'everything' delivery platform, whilst continuing to defend its core business.

BUSINESS OBJECTIVE #1:

REVERSE 'SLOWTH' AND KICK UBER EATS BACK INTO YEAR-ON-YEAR REVENUE GROWTH.

BUSINESS OBJECTIVE #2:

GROW THE CATEGORY PIE, WITHOUT LOSING MARKET SHARE.

As Uber Eats expanded beyond restaurant delivery, there was a real risk of sacrificing its market share. Particularly amid increasing competition across the broader delivery ecosystem.

KPI: Market Share.

Target:

- Maintain 2022 Market Share as total category value grew.

MARKETING OBJECTIVE: DRIVE GROCERY USAGE.

To achieve the business objectives, Uber Eats needed to expand how people used the app. Success depended on increasing Grocery penetration and orders.

KPI : Grocery Monthly Active User Growth.

Target-setting:

In 2022, the quarterly compound growth rate was 5.5% which provided the baseline benchmark. Compounding over three years at this rate would result in +90% cumulative active user growth by the end of Year 3. With a new brand positioning focused on driving grocery expansion, targets were set to exceed this benchmark (S3).

Baseline Growth Rate: +5.5% per quarter (2022 growth rate).

3-Year Target:

- Exceed +90% Grocery Monthly Active User growth.

COMMS OBJECTIVE: EXPAND BRAND PERCEPTION BEYOND RESTAURANT-FOOD DELIVERY.

Despite its dominance in takeaway food, Uber Eats had weak association with grocery. The communications objective was therefore to expand 'mental availability' into these new occasions (S6).

KPI 1: Grocery Awareness

Baseline: Average Grocery Awareness, Q2 2022 – Q4 2022 (indexed to 100).
Target: Exceed Baseline Grocery Awareness.

KPI 2: Grocery Consideration

Baseline: Average Grocery Consideration, Q2 2022 – Q4 2022 (indexed to 100).
Target: Exceed Baseline Grocery Consideration.

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SOURCES:

S1: Uber Eats internal financial reporting and growth forecasting (2022–2025). Baseline revenue growth based on 2022 performance; projected store expansion and incremental revenue per store modelled using 2022 merchant and revenue data.

S2: Uber Eats internal market share tracking data (2022), including category share trends and competitor performance.

S3: Uber Eats internal Grocery penetration tracking (2022–2025). Baseline benchmark derived from average quarterly Grocery penetration growth during 2022 (+5.5% per quarter). Compounding this rate across twelve quarters equated to approximately +90% cumulative penetration growth by Year 3.

S4: Uber Eats internal Grocery order tracking (July 2022–2025). Grocery order tracking commenced in July 2022; therefore H2 2022 growth (+23%) was used as the baseline benchmark. The three-year target (+127%) was calculated by compounding this growth rate across the sustained period ($1.23^3 = 2.27$).

S5: Uber Eats internal Restaurant order tracking (July 2022–2025). Restaurant order tracking commenced in July 2022; therefore H2 2022 growth rates were used as the baseline benchmark for future growth projections.

S6: Fiftyfive5, On-Demand Delivery – Australia Segmentation Study (2022); Uber Eats Australia Brand Health Tracker (2022). Grocery awareness, consideration and brand association measures demonstrated Uber Eats was strongly associated with restaurant-food delivery but weakly associated with grocery shopping occasions.

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Q4. WHAT WAS YOUR STRATEGY AND HOW DID YOU GET THERE?

OUR STRATEGY NEEDED TO BRIDGE THE NEED-STATE GAP BETWEEN INDULGENCE VS EMERGENCY.

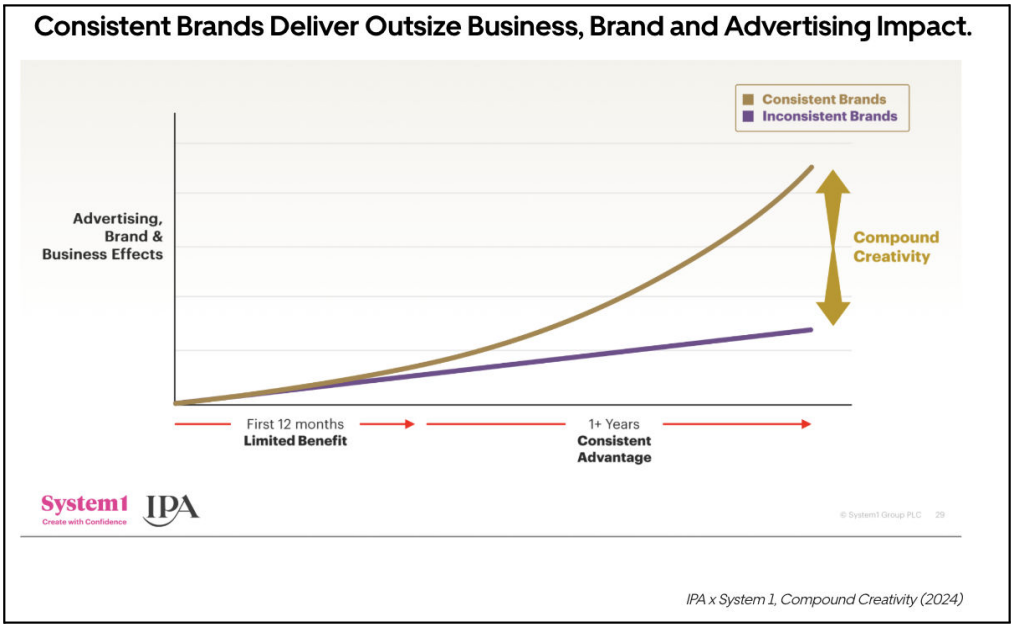
Uber Eats was coded for indulgent food-delivery moments. Future growth, however, depended on grocery occasions dominated by practical and often urgent need-states. This created a strategic dilemma: pivot toward rational 'need' behaviours, or double-down on emotional 'want' desires and risk not stretching the brand far enough to change behaviour.

CONSULTANCY LOGIC FAVOURED A MORE RADICAL CHANGE.

On paper, the answer seemed obvious. Uber Eats was already deeply entrenched in restaurant-food delivery, a mature $1.82BN category (S1). Rapid grocery delivery, by contrast, was a fast-growing already $2BN opportunity that demanded significant behaviour change (S2). The temptation was to build a wholly new positioning to capitalise on the 'gold rush' for a nascent category.

STRATEGIC INTUITION FAVOURED IGNORING CONSULTANCY LOGIC.

But logic only gets you so far. Everything we know about long-term effectiveness suggests consistency is one of advertising's most powerful growth levers (S3). While 'Tonight, I'll be eating...' may have reached its limit, the strategic DNA behind it had not. We needed to retain the magic, but evolve the message. To move on, without moving off course.



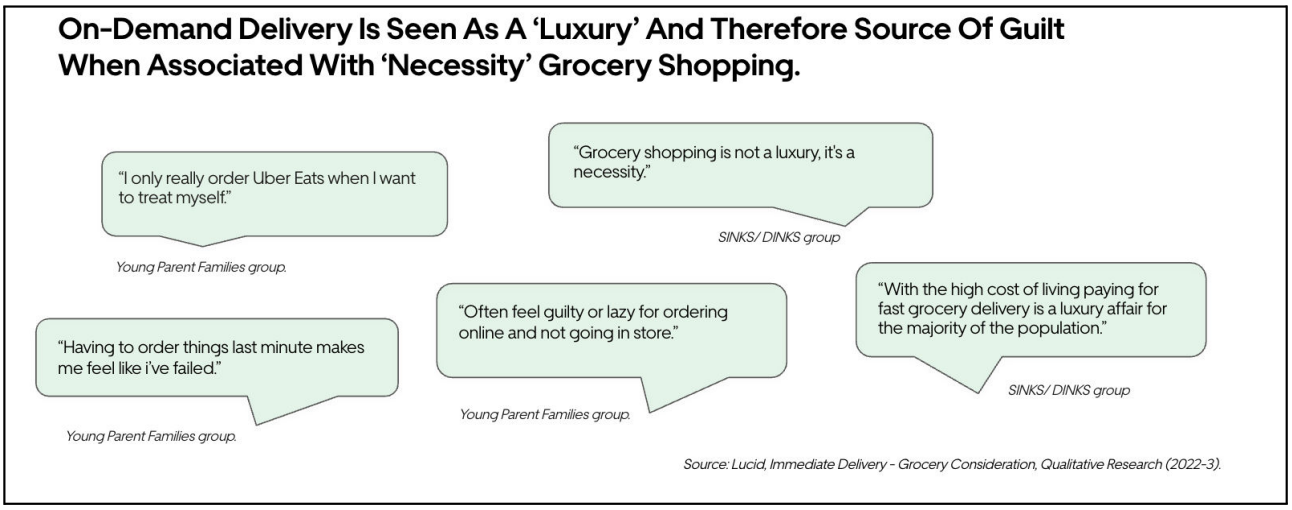
COULD THE WRONG ANSWER ACTUALLY BE THE RIGHT ONE?

The strategic magic that built Uber Eats wasn't anchored in a function, but a feeling. It celebrated the emotional payoff of acting on impulse and indulging in *whatever you want* for dinner. The problem? Grocery sat firmly in the bucket of 'rational need', making it easy to dismiss as a credible place for indulgence. But did it have to? Could the strategy that built the brand also unlock its future?

THE MENTAL CONSTRAINT.

Ordering Uber Eats for dinner was a permissible indulgence, but ordering it for groceries came with an extra-large side of guilt (S4). It made people feel 'bad', instead of 'good'. This was something we wanted to alleviate rather than reinforce.

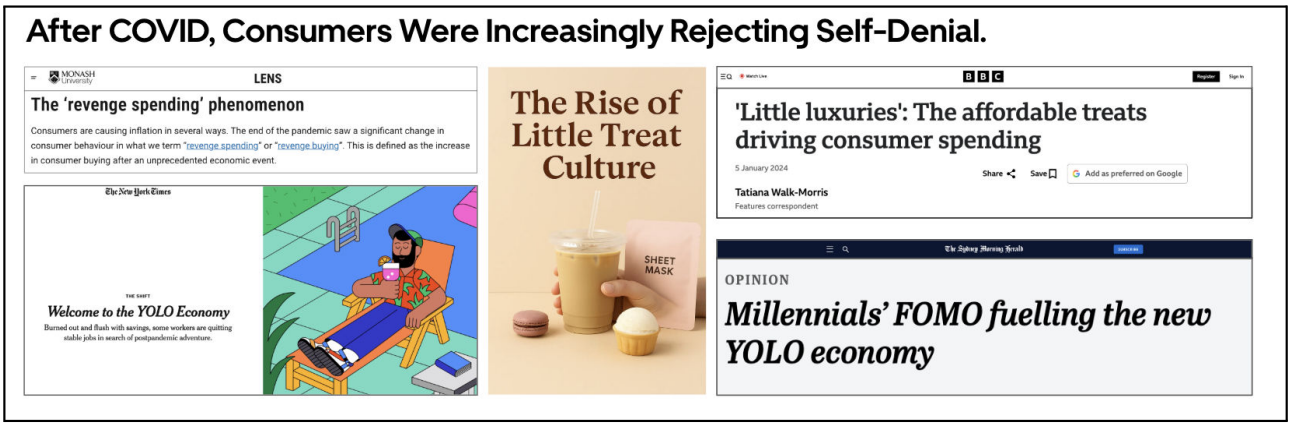
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YET THERE WERE SIGNS OF A POST-COVID PERMISSION SHIFT

Post-Covid, Australians were increasingly tired of rules and restraint. Trends like Neo-Hedonism, Maximalism and the YOLO economy reflected a growing appetite for self-reward (S5). 'F**k it' indulgence was so in. Despite inflation, spending on everyday 'little treats' was up +16% YOY, even as consumers reduced spend elsewhere (S6).

People were primed to live a life less constrained.



EVERYDAY INDULGENCE WAS CONFINED TO SPECIFIC OCCASIONS.

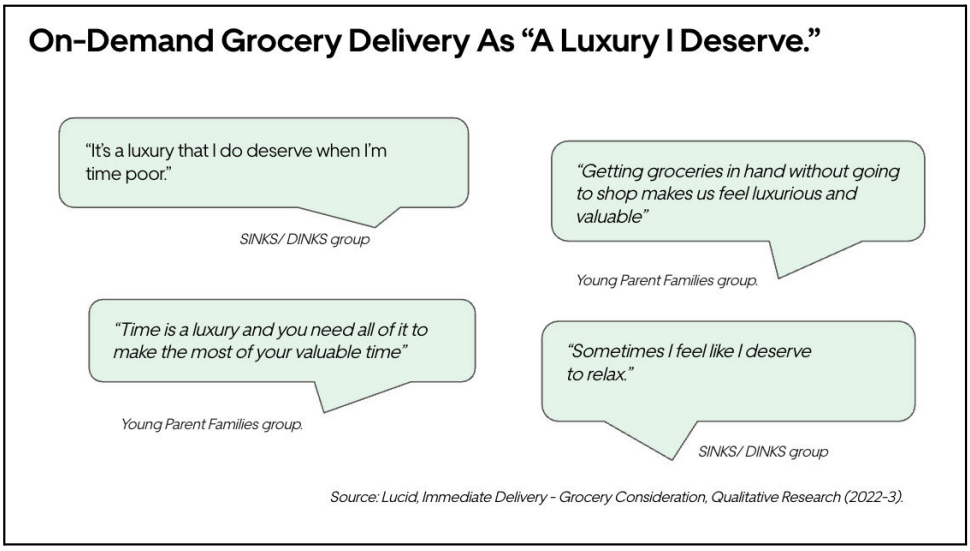
The issue wasn't appetite for indulgence. It was where people believed indulgence was allowed. Hump day food delivery = relief. Movie-night ice cream = treat. Friday night pizza = reward. But groceries? Washing up liquid? Mid-week milk? *This* indulgence was compartmentalised as 'not allowed'.

FROM ABANDONING TO LIBERATING INDULGENCE.

This was a false constraint that needed to be broken. Why should indulging in on-demand delivery be limited to restaurant food? Why can't *"I must have it now"* apply to anything you want or need - guilt-free? From snacks for movie night and drinks with friends, to last-minute ingredients, emergency nappies or even when you just can't be bothered to go to the shops?

When reframed like this in research groups, people agreed that grocery delivery is "a luxury I deserve" in today's time-constrained environment (S7).

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Our opportunity wasn't to abandon indulgence, but to liberate it - by normalising the indulgence of getting anything delivered on demand.

This would move the brand from: a place to get whatever I want for dinner.

To: A place to get whatever I want, whenever I want it. Guilt-free.

STRATEGIC IDEA: CELEBRATE A LIFE LIVED WITH INSTANT ACCESS TO ANYTHING - *YES, ANYTHING* - YOU WANT.

SOURCES:

S1: IBISWorld (2022).

S2: IBISWorld, Australian Rapid Grocery Delivery Market Value (2022).

S3: Binet & Field, The Long and the Short of It (2013); IPA x System 1, Compound Creativity (2024); WARC, Enduring Icons - The Creative Effectiveness Ladder (2023).

S4: Lucid, Immediate Delivery - Grocery Consideration, Quantitative Research (2022).

S5: WGSN Consumer Forecasts (2022–24); GWI Zeitgeist Report (2022); Pinterest Predicts (2023). Sources identifying emerging consumer trends including Neo-Hedonism, Maximalism and YOLO-driven self-reward behaviours.

S6: Circana, The Rise of Little Treat Culture (2023); McKinsey & Company, The State of the Consumer (2023). Spending on everyday indulgences and 'little treats' increased despite broader reductions in discretionary spending.

S7: Lucid, Immediate Delivery – Grocery Consideration, Research (2022). Qualitative and quantitative research exploring attitudes toward on-demand grocery delivery, including responses to reframing delivery as a deserved convenience or indulgence.

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Q5. HOW WAS YOUR STRATEGY BROUGHT TO LIFE?

INTRODUCING THE NEW PLATFORM: 'GET ALMOST *ALMOST* ANYTHING'

The creative leap was simple but powerful.

Of course, Uber Eats can't deliver literally anything. But in that limitation, we found a communications superpower. While the business expanded what *could* be delivered, we turned the things Uber Eats *couldn't* into a source of entertainment. Because when Uber Eats shows you what you *can't get*, it makes everything you *can get* all the more impressive.

RETAINING THE MAGIC, WHILE EVOLVING THE MESSAGE.

While the aperture of what Uber Eats could deliver expanded, the feeling it delivered remained unchanged: guilt-free indulgence in whatever you desire, right now. This allowed us to evolve the brand whilst preserving the DNA established by 'Tonight, I'll be eating...':

- Indulgence and immediacy.
- Playing with celebrity pop culture.
- Hyperbolic entertainment, rooted in product truth.
- Distinctive Assets (the bag, the doorbell, the green).
- An irreverent, self-aware tone.

THE AUDIENCE BULLSEYE.

Primary communications audience: Existing Uber Eats monthly active users (S1). Critical to defending restaurant-food delivery leadership and most likely to trial new categories.

Broader media audience: All potential category users in Uber Eat's addressable market (79% of 18+ Aussies). Critical to maintain salience with lighter users and build future demand (S2).

THE COMMUNICATIONS ARCHITECTURE.

The campaign was designed around two, reinforcing communications pillars (Chart 1):

1. **BRAND:** Make the new positioning famous through broad-reaching, high-impact media including TV, BVOD, OLV, OOH and cinema.
2. **PRODUCT:** Showcase the growing range of products available on Uber Eats, using surprising edge-cases to demonstrate breadth and challenge assumptions about what the brand could deliver through more targeted channels at higher frequencies.

Chart 1: 'Get Almost *Almost* Anything' Communications & Media Strategy.

Pillar	Audience	Media strategy	Channels	Role of Creative
1. BRAND	Mass (all delivery category buyers)	High Reach, High Impact	TV, SVOD, Cinema, large format OOH, OLV, AO broadcast sponsorship	Role of creative: Make the new positioning famous.
2. PRODUCT	Uber Eats core users (SINKS/DINKS, young parent families)	High Frequency	OLV, small format OOH, social media, audio, digital, gaming partnership	Role of creative: Showcase the full range of products now available on Uber Eats.

PHASE 1 (2023): LAUNCHING THE CAMPAIGN.

The campaign launched with a provocation: Uber Eats can deliver *'Anything?'*

Celebrities including Kendall and Kris Jenner attempted to order their wildest dreams, only to discover Uber Eats couldn't actually deliver anything. But it could deliver almost *almost* anything, which was demonstrated through a stream of people testing the limits of what was possible.

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Chart 2: 'Get Almost *Almost* Anything' Launch TVC 2023.



Chart 3: 'Get Almost *Almost* Anything' Launch OOH 2023.

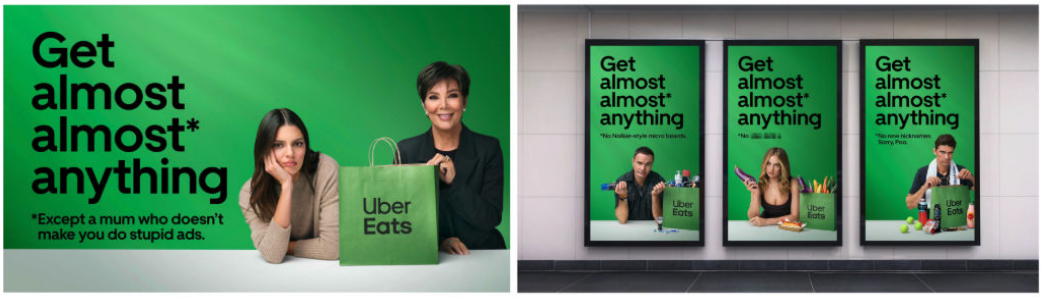


Chart 4: 'Get Almost *Almost* Anything' 'Disclaimer' OOH 2023.



PHASE 2 (LATE 2023 - 2026): PLAYING WITH THE 'ALMOST'.

Having established the new positioning, we added a creative twist. More celebrities attempted to order their deepest desires... only to discover that some wishes are best left **un**delivered. Tom Felton landed in prison after trying to order magic but accidentally 'disappearing' his neighbour, while Nicola Coughlan's (of Bridgerton fame) quest for a 'period romance' ended with an outdated misogynist - and newfound appreciation for 'period relief' instead (Charts 5, 6, 7).

Chart 5: 'Magic' & 'Period' OOH 2023.



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Chart 6: 'Magic' & 'Period Romance' TVCs 2023.

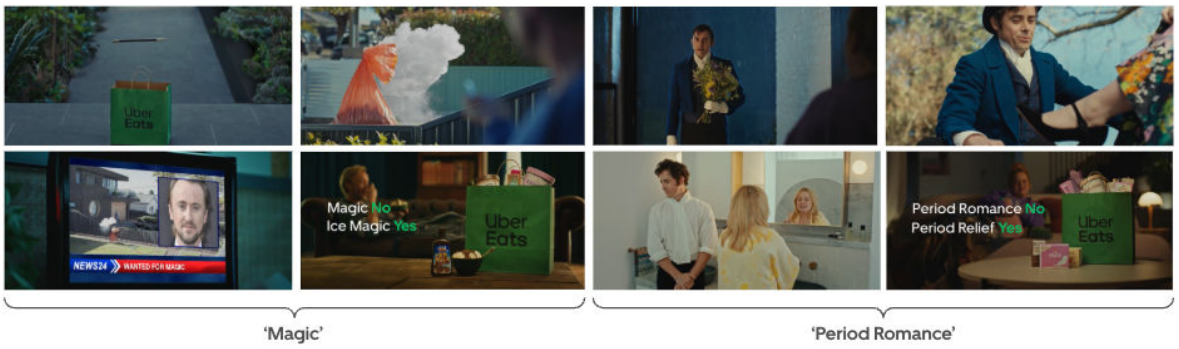
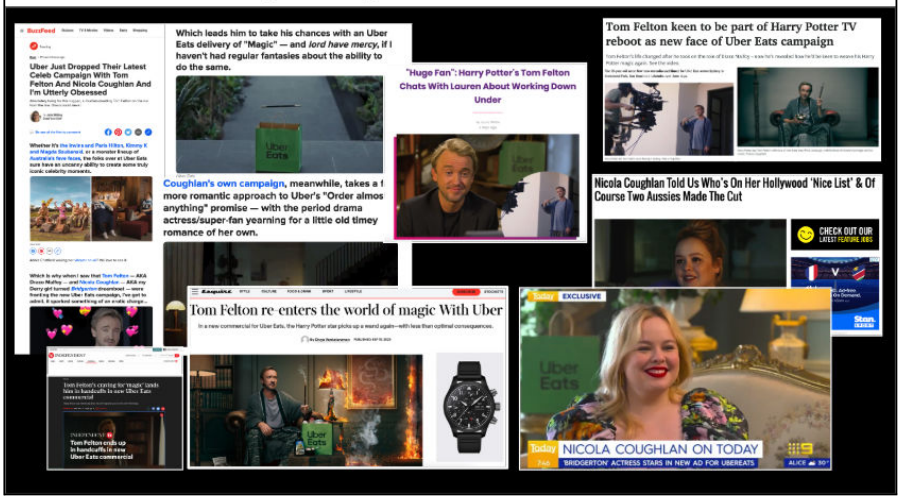


Chart 7: Earned Coverage of 'Magic' & 'Period' 2023.

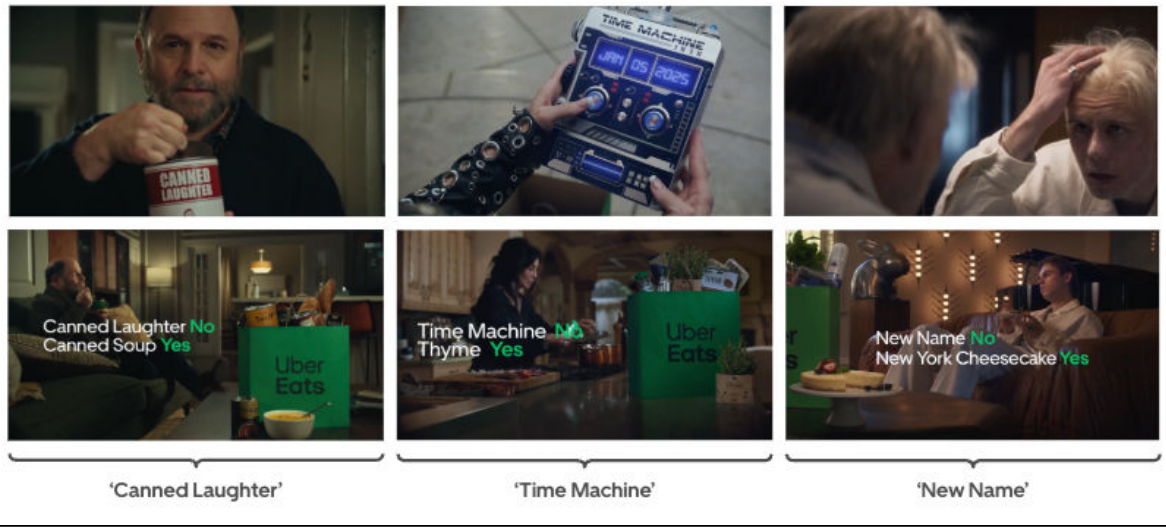


Between 2024 and 2026, the entertainment escalated while maintaining the same narrative structure. Jason Alexander ordered 'Canned Laughter' to satiate his desire to get laughs, but discovered some situations don't call for laughter.

Cher ordered a time machine to revisit her 1980s glory days, only to land in the 1680s by mistake.

And The Kid Laroi tried to be taken more seriously by ordering a new name (The 'Man Laroi'), only to discover growing up has some downsides too (Charts 8, 9, 10).

Chart 8: 'Canned Laughter', 'Time Machine' and 'New Name' TVCs 2024 - 2026.

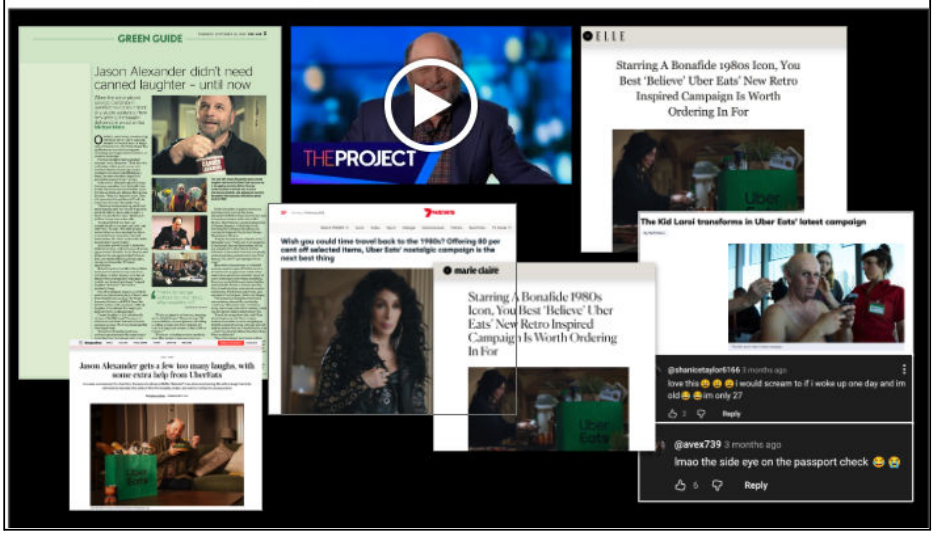


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Chart 9: 'Time' OOH 2025.



Chart 10 : Earned Coverage of 'Canned', 'Time' & 'New' 2024-2026.



PRODUCT COMMS (2023-2026): THE 'NO/YES' SYSTEM.

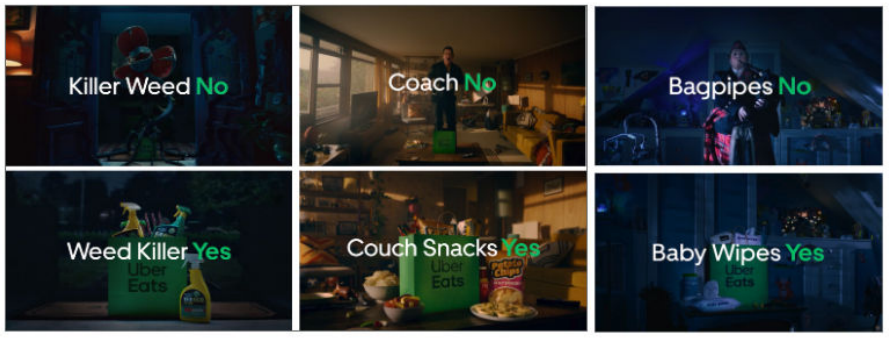
To connect 'brand' and 'product' communications layers, a simple device was introduced: 'NO/YES' By pairing what Uber Eats *couldn't* deliver with what it now *could*, showcasing new product breadth at scale was turned into entertainment. Running across OOH, digital, social and film, it ensured the campaign didn't just build fame for the new positioning, but also awareness for everything now available on the app (Charts 11, 12).

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Chart 11: 'NO/YES' Product OOH, Digital, Social (2023 - 2026).



Chart 12: 'NO/YES' Product TVCs (2023 - 2026).



TAPPING INTO BROADER CULTURE (2025-2026).

As the platform matured, the ambition expanded. If Uber Eats' mission is to get you *almost almost* anything, the aim was to demonstrate that commitment in culturally relevant real-world moments.

NATIONAL ELECTION, 2025.

The next 'anything' delivery mission was democracy sausages, ensuring all Australians could enjoy a beloved election-day ritual. Fronted by chef Hüey Hewitson, the campaign turned a cultural institution into a tangible demonstration of the campaign promise, with proceeds donated to the Australian Red Cross (Chart 13).

Chart 13: 'Get Almost *Almost* Anything, Even A Democracy Sausage' (2025).



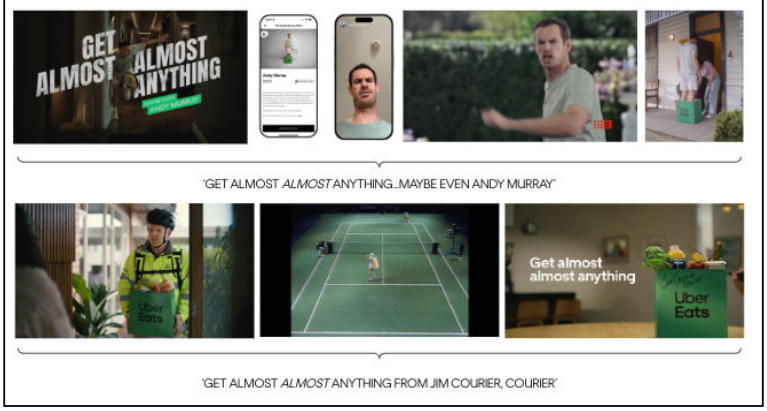
'GET ALMOST *ALMOST* ANYTHING' AT AUSTRALIA'S BIGGEST TENNIS TOURNAMENT, 2025 & 2026.

In 2025, Uber Eats embarked on a mission to add tennis superstar Andy Murray to the app for delivery, proving it really could deliver almost anything. When Andy refused to take part, a real-time chase unfolded across TV, broadcast integrations (traffic reports, entertainment programming) and social media, turning the campaign promise into a national talking point (Chart 14).

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This was followed up in 2026 by casting tennis legend and commentator Jim Courier as an Uber Eats 'courier'. The mockumentary-style campaign imagined a world where Courier finally 'lived up to his name', sending the four-time Grand Slam champion on a light-hearted delivery run across Melbourne to deliver people almost anything (Chart 14).

Chart 14: 'Australian Tennis Tournament' Campaigns (2025 & 2026).



SUSTAINED CONSISTENCY OVER TIME.

Across three-years, the campaign reinvented itself around the same core strategic intent, idea and tone. From launch announcement to behavioural proof, from celebrity storytelling to national mission moments, 'Get Almost *Almost* Anything' consistently built on the foundations of its predecessor (Tonight, I'll be eating...) while expanding the brand positioning far beyond it.

In a cost-of-living crisis, while competitors leaned into rational price-point messaging, Uber Eats doubled-down on the seemingly irrational - indulgence, emotion and consistent creative magic.

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Q6. HOW DO YOU KNOW THAT YOUR CAMPAIGN WAS SUCCESSFUL?

WHAT ARE THE HEADLINES?

The 'Get Almost *Almost* Anything' campaign reversed 'category slowth,' transforming the brand back into an engine for sustained, compounding growth.

- xx% Revenue growth recovered from a post-COVID low to double-digit growth.
- Captured +13% market share, outpacing the category.
- Grocery Consideration more than doubled +177%, and Grocery Awareness by +69%.

This was not a marginal uplift. It was a sustained structural transformation across revenue, consumer behaviour and brand that unlocked new growth for the business.

BUSINESS OBJECTIVE #1:

REVERSE 'SLOWTH' AND KICK UBER EATS BACK INTO REVENUE GROWTH.

Uber Eats didn't just restore growth. It fundamentally reversed its trajectory, hitting the 3-year target in the first year. By year 3, **Uber Eats was growing more than 18x faster** (2025 growth / 2022 growth) than it had been prior to the platform launch. What began as a response to category maturity became one of the strongest growth periods in Uber Eats Australia's history (S1).

BUSINESS OBJECTIVE #2:

GROW THE CATEGORY PIE, WITHOUT LOSING MARKET SHARE.

Uber Eats did not sacrifice leadership on one front in pursuit of expansion on another. As the brand moved into Grocery, it simultaneously widened the gap between competitors and strengthened its dominance in delivery overall.

KPI: Market Share.

Target:

- Maintain Market Share in line with 2022 Baseline as total category value grew.

Result:

- Uber Eats grew its already-sizable category lead, delivering **+13% Market Share growth** versus 2022 baseline levels by March 2026 (S5).

MARKETING OBJECTIVE: DRIVE GROCERY DELIVERY USAGE.

KPI: Grocery Monthly Active User Growth.

3-Year Target:

- Exceed +90% Grocery Monthly Active User growth.

Result:

- Grocery Active Users increased **+192% by the end of 2025**, and **by Q1'26 this had extended further to +209%**. whilst Restaurant-food Active Users (+35%) also continued to grow (S6). Proving that 'Get Almost *Almost* Anything' didn't just help convert existing Uber Eats users, but acquire new ones too.

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COMMS OBJECTIVE: EXPAND BRAND PERCEPTION BEYOND RESTAURANT DELIVERY.

Our platform didn't just make consumers more aware that Uber Eats offered grocery, it fundamentally changed what they considered the brand for. **Grocery Consideration almost tripled** the baseline (+177%), demonstrating a significant shift in the role Uber Eats played in consumers' lives. Importantly, this came at no cost to Restaurant Awareness which also increased (+7%) over the baseline (S10).

KPI 1: Grocery Awareness

Target: Exceed Q2 2022 - Q4 2022 Baseline.

Result: By Q1 2026, Grocery Awareness was +69% above baseline.

KPI 2: Grocery Consideration.

Target: Exceed Q2 2022 - Q4 2022 Baseline.

Result: By Q1 2026, Grocery Consideration was +177% above baseline.

COMPOUND CREATIVITY MADE THE CAMPAIGN MORE EFFECTIVE OVER TIME.

System1 and the IPA argue that creative consistency compounds effectiveness over time (S11). 'Get Almost *Almost* Anything' proved this in practice, regularly exceeding Ipsos norms across key effectiveness measures. Rather than plateauing, the campaign became more effective over time, strengthening the Uber Eats brand with each successive campaign (S12).

DISTINCTIVE BRAND ASSETS GREW ALONGSIDE THE BUSINESS.

In a low-attention category, distinctive brand assets are crucial. Rather than abandoning those built under 'Tonight, I'll Be Eating...', 'Get Almost *Almost* Anything' strengthened them further. The green, the bag, the app and the Uber Eats name all grew significantly in fame and uniqueness over the sustained period (S13).

SOURCES:

S1: Uber Eats internal financial reporting, annual revenue growth data 2018–2025.

S5: Uber Eats internal market share tracking data (January 2022–March 2026), indexed to 2022 baseline levels.

S6: Uber Eats internal user penetration tracking data (2022–2026). Grocery, Restaurant and Total Platform penetration indexed to end-2022 baseline levels.

S7: Uber Eats internal Grocery order data and forecasting model (July 2022–March 2026). Grocery order tracking commenced in July 2022; therefore H2 2022 growth rates were used as the baseline benchmark for projected growth.

S8: Uber Eats internal Restaurant order data and forecasting model (July 2022–March 2026). Restaurant order tracking commenced in July 2022; therefore H2 2022 growth rates were used as the baseline benchmark for projected growth.

S9: Uber Eats internal active user and order data (2022–2026). Total Orders and Active Users indexed to end-2022 baseline levels.

S10: Uber Eats Australia Brand Health Tracker (2022–2026). Grocery Awareness, Grocery Consideration and Restaurant Awareness measures against Q2–Q4 2022 baseline levels.

S11: System1 Group & IPA, 'The Power of Creative Consistency' effectiveness research. Findings demonstrate that creatively consistent brands generate compounding advertising, brand and business effects over time, with advantages increasing beyond the first 12 months of sustained platform investment.

S12: Ipsos Australia Creative Effectiveness Testing, Uber Eats 'Get Almost Almost Anything' campaign platform tracking (2023–2025). Measures include Brand Attention, Memory, Brand Linkage and Equity Effectiveness Index versus Ipsos category norms across successive campaign executions.

S13: Ehrenberg-Bass Institute, Uber Eats Distinctive Brand Asset Tracking Study (May 2021 vs March 2025), measuring Fame and Uniqueness of core Uber Eats brand assets including the bag, green colour, app and brand name.

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Q7. WAS THE CAMPAIGN A GOOD INVESTMENT?

‘GET ALMOST *ALMOST* ANYTHING’ DELIVERED A 293% PROFIT ROI.

To calculate ROI, we first established the amount of incremental revenue generated by the campaign above the projected baseline. This was modelled using Uber Eats’ 2022 growth rate (+2%) (S1), the year immediately prior to the launch of ‘Get Almost *Almost* Anything’. However, not all of this incremental revenue could be attributed solely to marketing effects. As outlined earlier in this paper, the launch of ‘Get Almost *Almost* Anything’ coincided with increased ‘physical availability’ as the brand expanded its stores and merchant distribution into new categories. To account for this, we removed revenue associated with new stores from our campaign attribution.

This resulted in a final **Profit ROI of 293%.**

In other words, **every $1 invested returned $2.93 in profit**

Crucially, this profitability was achieved whilst simultaneously expanding into new business verticals, strengthening market leadership, increasing app usage and penetration, and growing Uber Eats’ distinctive brand assets.

A BIGGER BET DELIVERED AN EVEN BIGGER RETURN.

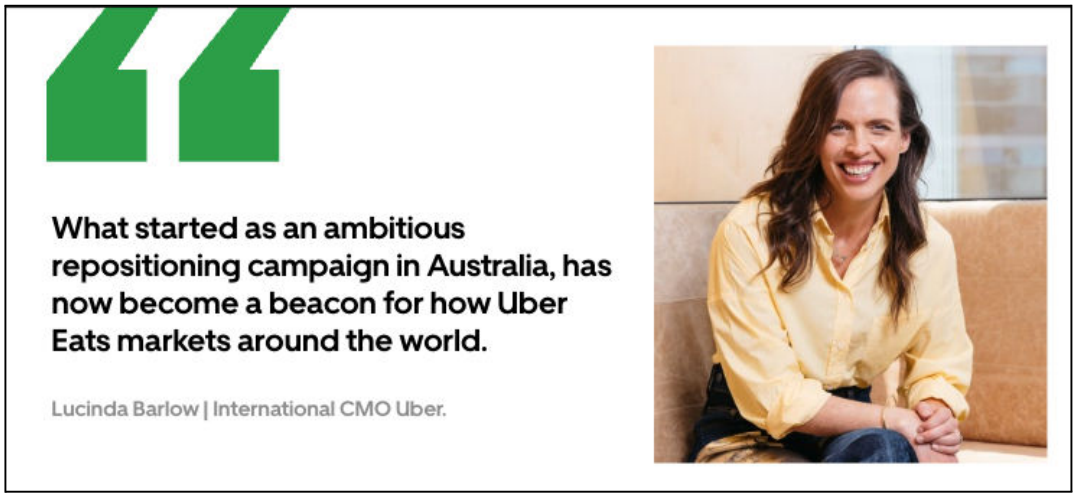
By 2022, Tonight, I'll Be Eating... was one of Australia's most successful advertising campaigns, even winning a Grand Effie. Replacing it was a major risk.

It proved to be one worth taking.

Despite being measured using a more conservative ROI methodology, ‘Get Almost *Almost* Anything’ increased ROI from 280% to 293%. And because the previous campaign was assessed using Revenue ROI rather than Profit ROI, this likely understates the true improvement.

FROM DOWN UNDER TO UP TOP: ANOTHER GLOBAL SUCCESS STORY

Perhaps the clearest sign of a good investment is when others choose to replicate it. Like its predecessor, ‘Get Almost *Almost* Anything’ began in Australia before being adopted across multiple global markets, including the US, Canada, Mexico, Spain, Taiwan, New Zealand, Portugal and Sri Lanka. Even making its way to the Superbowl. It also helped cement Australia as an unlikely centre of marketing excellence for Uber, earning some heavy-hitting awards, including a Gold Effie and a Grand Prix at Spikes Asia.



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Assorted 'Get Almost *Almost* Anything' Creative Around The World.



SOURCES:

S1: Uber Eats internal financial modelling and revenue forecasting, comparing actual Gross Bookings performance versus projected baseline trajectory based on continuation of 2022 growth rates (+2%), January 2023–March 2026.

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Q8. DEMONSTRATE THAT THE RESULT WAS NOT DUE TO OTHER FACTORS

WAS THERE A CHANGE TO THE MACRO-ECONOMIC ENVIRONMENT?

Yes, the cost-of-living crisis coincided with the entire campaign period, and it likely hindered Uber Eats growth. Characterised as the year of 'per capita recession', 2024 was particularly bad. The consumer confidence index has remained net-negative throughout the campaign period (low 80s-90s), having a gruelling impact on non-discretionary spending (-3% share of wallet since 2023) (S1). While in theory, people were primed to spend more on everyday indulgences, in practice they had less money to do so.

DID INCREASED PRODUCT AND MERCHANT AVAILABILITY DRIVE GROWTH?

As noted, physical availability expanded and to ensure a clean ROI calculation, the baseline targets were adjusted accordingly and revenue from new stores was excluded, proving growth far outstripped that expansion.

To reinforce this, analysis of legacy merchant-partners (those active pre-2023) was conducted. Order volume among them grew significantly during the campaign (S5). This strong performance proves that consumer demand was actively driven by the campaign itself, rather than being a passive by-product of increased availability.

WAS THERE OTHER MARKETING ACTIVITY?

Uber Eats maintained a comprehensive, always-on marketing programme throughout the period. While supported by promotions, investment remained heavily weighted toward long-term brand building, that was consistent with the 2022 pre-campaign baseline (S6). The only notable change was the launch of 'Ding Dong Deals' in June 2025, running for 12 weeks. But rather than increasing spend, it largely consolidated existing promotional activity under a single platform (S7).

DID WE JUST OUTSHOUT OUR WAY TO SUCCESS?

No. Share-of-Voice remained consistent with the three years prior to the campaign, indicating growth was not driven by disproportionate media investment (S8).

Despite maintaining a broadly consistent Share-of-Voice (SOV) compared to pre-campaign years (Chart 3), Uber Eats expanded its Share-of-Market (SOM) well beyond what media investment alone would predict. According to IPA-backed marketing science principles, brands typically grow when SOV exceeds SOM, and contract when the reverse is true (S9). Yet throughout, Uber Eats consistently outperformed this expected relationship. This suggests market-share gains were driven by creative effectiveness, not media weight alone (S10).

SOURCES:

S1: ABS, Consumer spending data (2020–2026); ANZ-Roy Morgan Consumer Confidence Index (2021–2026).

S2: Uber Eats internal market share tracking data, including competitor market share trends and Deliveroo exit-period market share (~10%) (2022).

S3: Uber Eats internal market share tracking data, including Menulog exit-period market share levels (2.8%) (2025).

S4: IBISWorld, Market Share data - rapid delivery category (2026); Woolworths Group, Milkrun acquisition announcement (May 2023).

S5: Uber Eats internal merchant-partner order data, indexed growth across existing national merchant partners during campaign period (January 2023–December 2025).

S6: Uber Eats internal marketing investment and promotional activity reporting, including Ding Dong Deals launch timing and promotional spend comparisons versus prior years (2023–2025).

S7: Uber Eats internal marketing investment reporting (2025).

S8: Uber Eats Australia media investment analysis and Share of Voice tracking, comparing sustained-period media investment levels versus prior three-year period (2019–2022).

S9: IPA, The Long and the Short of It and Excess Share of Voice (ESOV) effectiveness principles. Research demonstrates that brands with Share of Voice exceeding Share of Market tend to grow, while brands with lower relative Share of Voice tend to decline.

S10: Uber Eats Australia Share of Voice and Share of Market analysis (2023–2025), based on internal media investment data and category market share tracking. Analysis compares Uber Eats' actual Share of Market performance against expected ESOV benchmarks.

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Q9. GIVE CONTEXT TO BUDGET IN COMPARISON TO COMPETITORS.

Q10. GIVE CONTEXT TO THE BRAND'S OVERALL BUDGET.

Q11. MEDIA BUDGET ELABORATION

Across the sustained period, media investment remained broadly consistent with historical levels. Share of Voice averaged 43% between 2023–2025, closely aligned with the 44% average recorded between 2016–2022 indicating the campaign did not rely on disproportionate increases in spend to drive growth.

Investment focused on high-reach brand channels (TV, BVOD/SVOD, cinema and large-format OOH) to build fame for the 'Get Almost *Almost* Anything' campaign, supported by high-frequency digital and social media to showcase the expanding product range and drive consideration among existing users.

The campaign was designed to maximise the effectiveness of each media dollar through culturally resonant creative, earned amplification and integration into real-world moments (e.g. live media integrations and PR-led stunts). As a result, paid media worked alongside significant earned and owned media to extend reach and engagement beyond the paid investment alone.

Across the sustained period, total marketing investment remained broadly consistent with historical levels, with budget split approximately 70/30 between brand-building (creative, production, talent and media) and promotional activity (S1). Share of Voice averaged 43% between 2023–2025, closely aligned with the 44% average recorded between 2016–2022, indicating growth was not driven by disproportionate increases in spend (Chart 3) (S2).

Media investment prioritised high-reach brand channels to build fame for Get Almost Almost Anything, with spend allocated across TV/Cinema (36%), OOH (23%), Online Video (22%), Social (15%) and Audio (5%) (S3).

The campaign was designed to maximise the effectiveness of every paid media dollar through culturally resonant creative, owned-channel integration and real-world activations. This generated significant earned and shared amplification, contributing approximately 15% incremental impressions beyond paid media alone (S4).

As a result, media investment delivered or exceeded forecast reach across all major channels, including TV, Cinema, Radio and Twitch (S5).

SOURCES:

S1: Uber Eats brand marketing budget reporting (2018–2025), including long-term brand-building versus promotional investment splits.

S2: Nielsen category spend tracking and Uber Eats media investment reporting (2016–2025), including Share of Voice analysis.

S3: EssenceMediacom media planning and investment reporting (2023–2025), including channel allocation across TV, Cinema, OOH, Online Video, Social and Audio.

S4: Uber Eats earned media communications tracker and media agency campaign reporting (2023–2025), including earned and shared media impression analysis.

S5: Essence Mediacom campaign performance reporting (2023–2025), including channel reach delivery and media effectiveness metrics.

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Q12. DESCRIBE OWNED MEDIA ACTIVITY

Throughout the campaign-period, the 'Get Almost *Almost* Anything' platform was extended into the app and CRM programme to continue announcing the new positioning and product offering to Uber Eat's existing user-base (the bullseye target audience for this campaign). This included integrating in-app messaging, offers and CRM sends with specific products featured in the campaign, along with limited-time offers on those products. Smart targeting also served people the most relevant local retail partners and products based on their location and order history.

Brand social platforms were used to extend the campaign across both paid and organic channels, with bespoke, platform-first content leveraging the campaign's talent. Organic social presence reinforced the platform through always-on content and cultural participation, while paid social amplified key moments and executions to drive scale.

Q13. OUTLINE ANY SPONSORSHIPS

Uber Eat's approach to TV sponsorships within 'Get Almost *Almost* Anything' is a dual strategy: achieving massive scale while earning a significant role in the cultural conversation. Through broadcast partnerships with Australia's most-watched television properties, the cultural phenomenon of 'Married At First Sight', the passion of the AFL, and the prestige of major tennis events, Uber Eats reaches millions of engaged viewers. This immense reach, however, is also matched with deep relevance. The strategy isn't just about being seen; it's about being part of the viewing ritual that captivates the nation. By aligning with these powerhouse events, Uber authentically integrates into the on-screen experiences that households are watching and discussing together, cementing the brand as a feature of Australia's biggest cultural moments.

Q14. OUTLINE COMMUNICATION TOUCHPOINTS

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