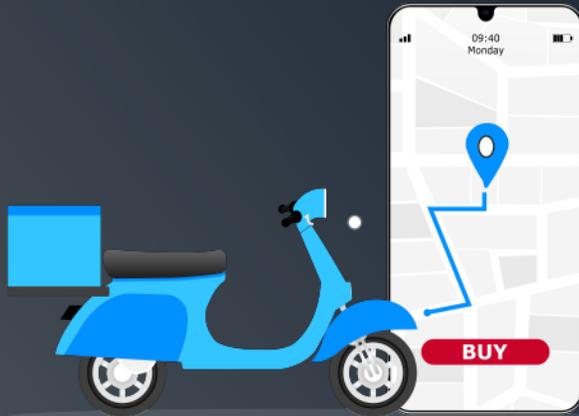


Which Takeaway App is the Most Popular?

Using Verified Digital Behaviours to Analyse UK Takeaway Habits

January 2021



1. Context

The background to the three leading UK
takeaway apps and the CitizenMe methodology...



deliveroo

Key Information

- Founded by Will Shu in 2013
- It generates revenues by taking a cut of up to 35% from the price of the takeaway, and by charging for its own 'deliveroo couriers'
- Its HQ is based in the UK but serves 80,000 restaurants worldwide in 500 towns and cities (2020)
- Its estimated worth is \$2 billion
- 25,000 couriers work for deliveroo in the UK (2019)
- It was estimated to hit 6 million UK customers in 2018
- Although it experienced a very successful start, there has been some issues, but Amazon's \$575 million stake has kept it afloat
- 15% of its permanent workforce have been let go during the coronavirus pandemic

JUST EAT

Key Information

- Danish firm founded in 2001
- It generates revenues by asking all businesses to install the 'Just-Connect box', linking the business to the Just Eat ordering platform. It takes a 10-15% cut of all takeaways
- This model has enabled it to have the largest network of restaurants in the UK, as it doesn't need to hire or provide drivers in each town
- It has expanded through acquisition, recently acquiring Takeaway.com and Grubhub, to name a couple
- Revenues hit £1 billion (2019), a 28% increase year-on-year
- It boasts 38 million people worldwide use them more than once a month
- Average order value was £19.05 in 2018 (latest available figures)

Uber Eats

Key Information

- Founded as a separate sister company in 2014
- It generates revenues by taking a cut of up to 30% from the price of the takeaway, and utilises its existing network of riders
- It has been struggling to gain market share against Just Eat, especially after the Grubhub merger, and against Deliveroo's London restaurant trade
- It allegedly controls 29% of the global food delivery market
- McDonalds reportedly accounted for 60% of Eats deliveries in the UK in 2019
- In the second quarter of 2020, Eats surpassed Rides in revenue, becoming Uber's main source of income
- The average Uber Eats delivery time is 30 minutes

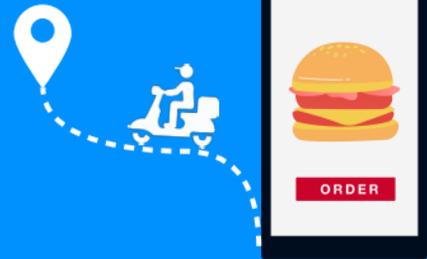
Our Research Methodology

- Research was conducted via the CitizenMe app, collecting **verified device behaviours**, attitudes and demographics
- **969** UK people have either **deliveroo**, **Just Eat** or **Uber Eats** installed on their smartphones
- Age range is between **18-54**, with a split of male and female **40/60**
- **73%** have **Uber Eats**, **70%** have **Just Eat**, **49%** have **deliveroo** installed on their smartphones



2. Our Analysis

We reveal which takeaway app is the most popular, among whom, and why....



Did you know...

1 in 10

...have a takeaway app installed on their smartphone but **have not used it** to buy a takeaway over the past 6 months.

So we have **excluded the non users** from the remaining analysis!



Key Trends Among Those With a Takeaway App...



Are more likely to have other **retail apps** (*Asos & H&M*) and **video streaming apps** (*Netflix & Prime*) - potentially showing more digital expenditure habits



Are more likely to have **social media apps** installed on their smartphones, but this varies between takeaway app users



Are **less likely** to have children, but again varies between takeaway app users



59% only order through the app, compared to other channels



Key reasons for buying a takeaway are 'I like to have it as a treat' and 'It is a convenient option sometimes'



69% are likely to **check other delivery apps** for the best price or promotions, before ordering



The majority of users buy a takeaway **at least once a fortnight**



Pizza and Chinese were the top foods purchased in the past 6 months

The Combination of Takeaway Apps Among UK Users...



858

UK people with any of
deliveroo, **JUSTEAT** or
Uber **Eats** takeaway
apps



37% With only **one**
takeaway app

| | |
|------------------|------------|
| JUSTEAT | 19% |
| Uber Eats | 14% |
| deliveroo | 4% |



34% With **two** takeaway apps

| | |
|-------------------------------------|------------|
| Uber Eats + JUSTEAT | 18% |
| deliveroo + Uber Eats | 11% |
| JUSTEAT + deliveroo | 4% |



29% With **three**
takeaway apps

| | |
|------------------|------------------|
| Uber Eats | |
| JUSTEAT | deliveroo |



deliveroo



18%

Preferred this app when ordering takeaway

The Health-Conscious Professional

Those who prefer to use the **deliveroo** app are more likely to be younger outgoing males from the South of London. They are more extrovert and less neurotic than other takeaway app users, and fit the 'Pioneer - Transcender' mould for cultural values (<http://www.cultdyn.co.uk/valuesmodes2.html>).

These users tend to have good-paying senior jobs, with disposal cash to pay for their takeaways. They also show greater expenditure potential with more shopping (i.e. Amazon and Asos) and streaming apps (i.e. Netflix and Prime) on their smartphones. They like to buy the latest tech, with more having Apple phones than Android. They are settled with partners but slightly less likely to have children, playing into their more professional lifestyles.

This group make healthier choices. They are more likely to have fitness apps on their phones, and they make healthy choices when selecting their takeout food - choosing vegan, Mexican, Italian, or Sushi rather than kebabs or fish & chips. However, this doesn't mean they don't buy this type of food sometimes.

74%

Even with more disposal income, almost 3/4 say they check other apps for the best promotions and deals before ordering



Compared to other app users, this group is much more likely to use omni-channels for ordering food



The Convenience-Seeking Fast Foodie

Those who prefer to use the **Uber Eats** app are more likely to be 'in-the-moment' people from the South of England or London. They are slightly more neurotic compared to other users, and fit the 'Prospectors - Now People' mould for their cultural values. (<http://www.cultdyn.co.uk/valuesmodes2.html>)

These users are less likely to be in full-time work, or if they are, in junior roles. They tend to be either living with their parents or in a house share. They live a lifestyle of convenience towards food, being less likely to have a fitness or grocery shopping app on their phone but having a higher-than-average frequency in takeaway purchases.

With **Uber Eats'** big tie-up with McDonalds, it's no wonder that these users are more likely to visit burger fast food joints - they purchased more burgers through the Eats app in the last 6 months than other types of users. Also, they are much more likely to have the Wetherspoons' app installed...a burger and pint, anyone! Nevertheless, even though they like the idea of a burger more, they do enjoy other cuisines like Italian and Greek compared to other app users.

28%

Preferred this app when ordering takeaway

77%

Say they would check other apps for the best promotions and deals before ordering



Compared to other app users, this group are more likely to stick with just using their app to order takeaway



54%

Preferred this app when ordering takeaway

The Cost-Saving Joe Bloggs

Those who prefer to use the **Just Eat** app are more likely to be outside of the South of England or London (69%). They are slightly less extrovert than other users, and fit the 'Settlers' mould when it comes to their cultural values (<http://www.cultdyn.co.uk/valuesmodes2.html>).

These users are more likely to look for cost-saving food options because of their slightly lower income. They are people who would rather go to fast food places - Subway being the stand out - than to sit-down restaurants. They are also more likely to have price-point supermarket apps installed, like Asda's and Lidl's, and be less inclined to have streaming apps from Spotify, Netflix and Prime - potentially to cut down on expenditure.

Just Eat preferred users tend to have a young family compared to other preferred app users. This could account for their desire to find cost-saving options to reduce expenditure.

They are more likely than other users to have purchased more unhealthy foods, such as kebabs and Chinese, compared to Sushi, Greek or Italian. This might be explained by the price-point of these types of meal influencing their choices.

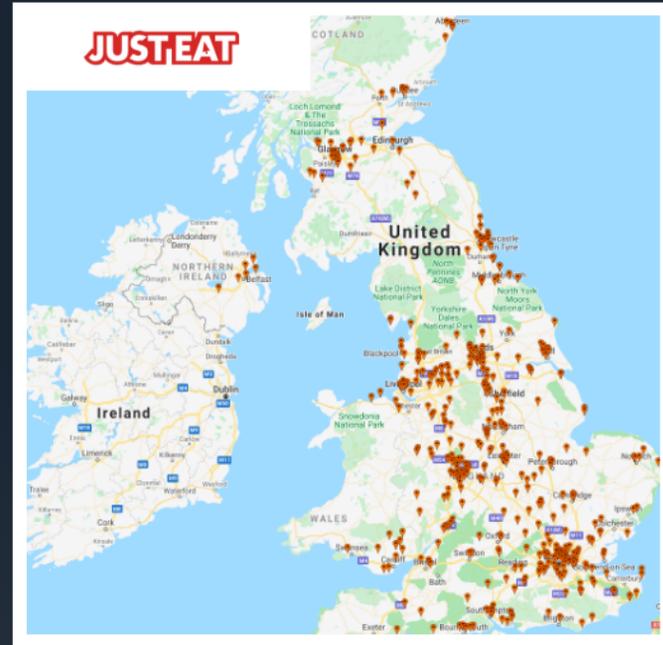
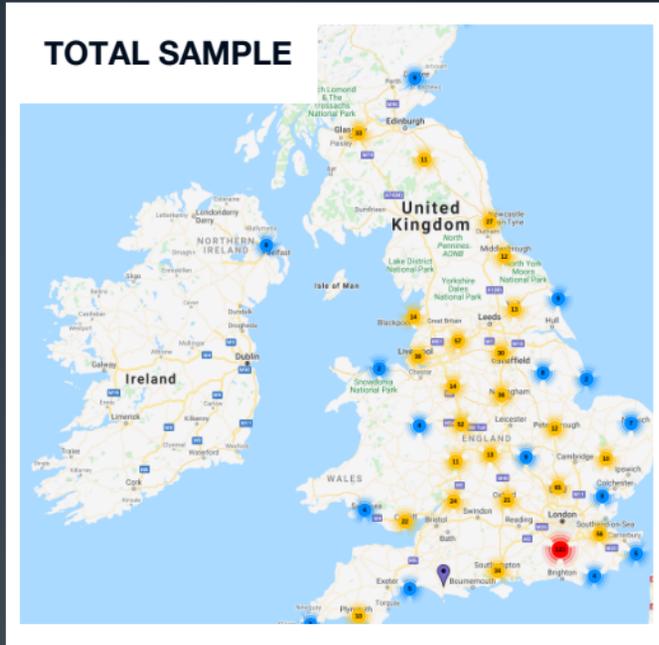
63%

Say they would check other apps for the best promotions and deals before ordering



40% of those who prefer **Just Eat** also order via restaurants' websites'

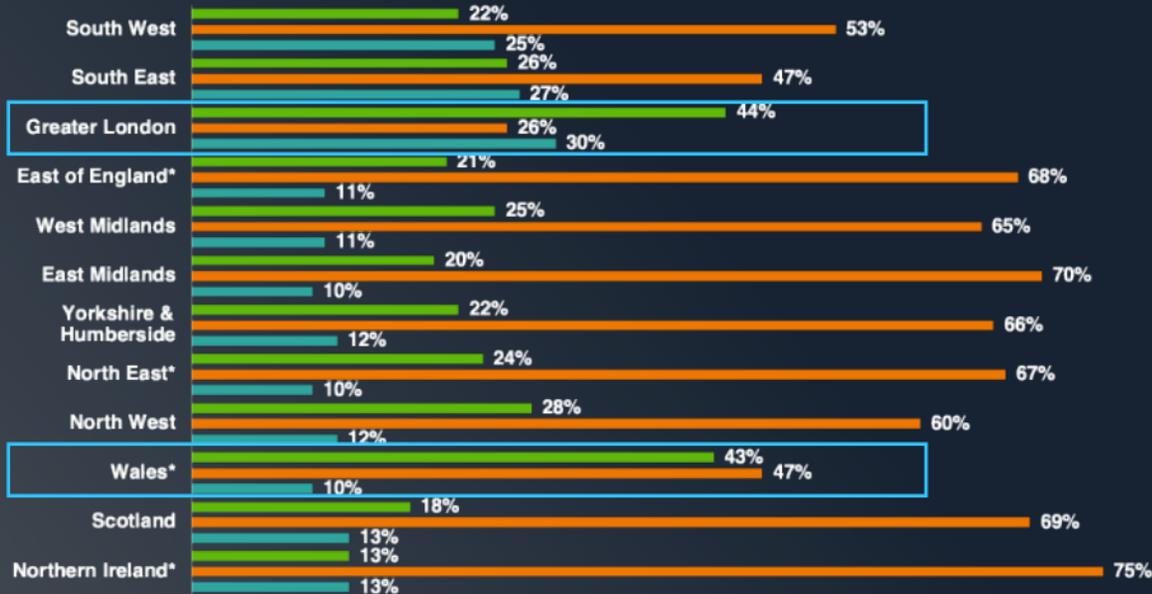
UK Map of Users' Preferred App, by Region...



UK Map of Users' Preferred App, by Region...



As Shown In the Maps, Preference is a Battle Field Across Regions - Especially London & Wales



Uber Eats

JUST EAT

deliveroo

Among **Uber Eats** and **deliveroo** Preferred Users, There is a Greater Focus in London...

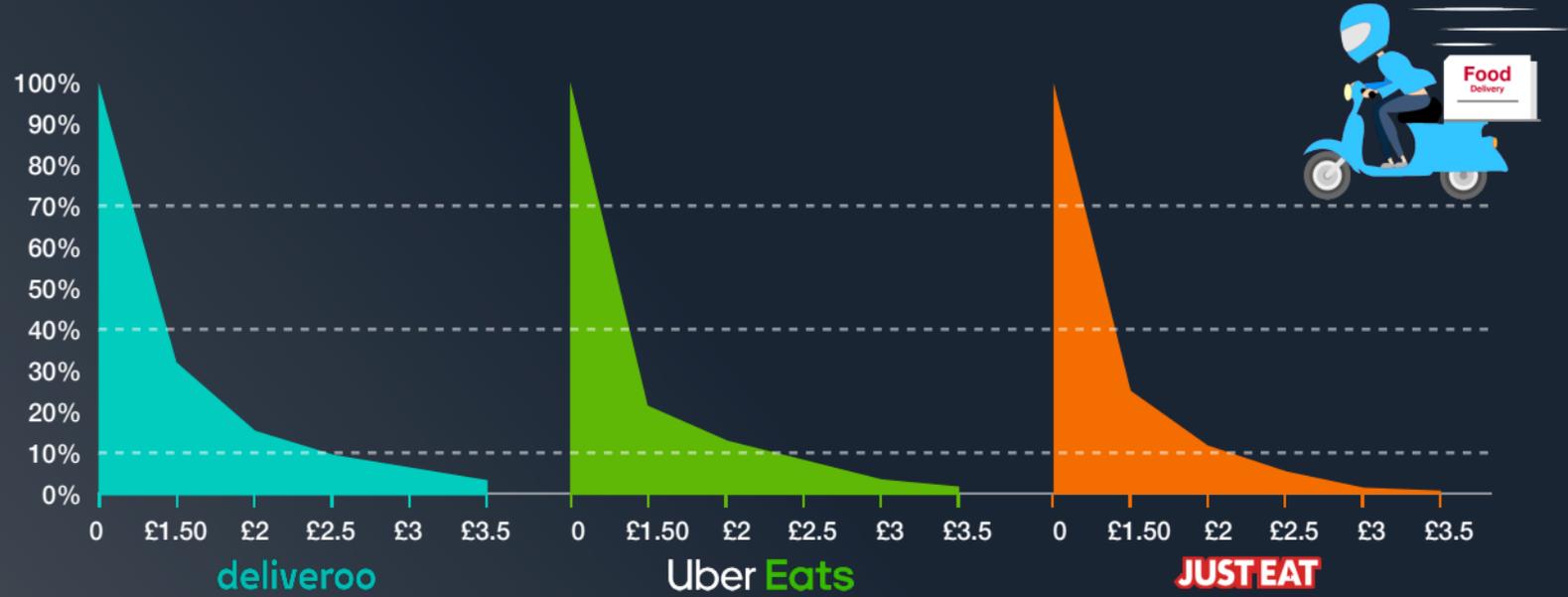
| | | |
|------------------------|----|----|
| Barking and Dagenham | 2% | 4% |
| Barnet | 4% | 1% |
| Bexley | 0% | 9% |
| Brent | 0% | 1% |
| Bromley | 0% | 4% |
| Camden | 2% | 7% |
| City of Westminster | 7% | 1% |
| Croydon | 2% | 4% |
| Ealing | 7% | 4% |
| East Grinstead | 0% | 0% |
| Enfield | 0% | 4% |
| Esher | 0% | 0% |
| Grays | 0% | 1% |
| Greenwich | 4% | 6% |
| Hackney | 0% | 0% |
| Hammersmith and Fulham | 7% | 3% |
| Haringey | 2% | 1% |
| Harrow | 4% | 3% |
| Havering | 0% | 0% |
| Hillingdon | 0% | 4% |
| Horley | 0% | 1% |

% of users' preferred takeaway app & who live in Greater London



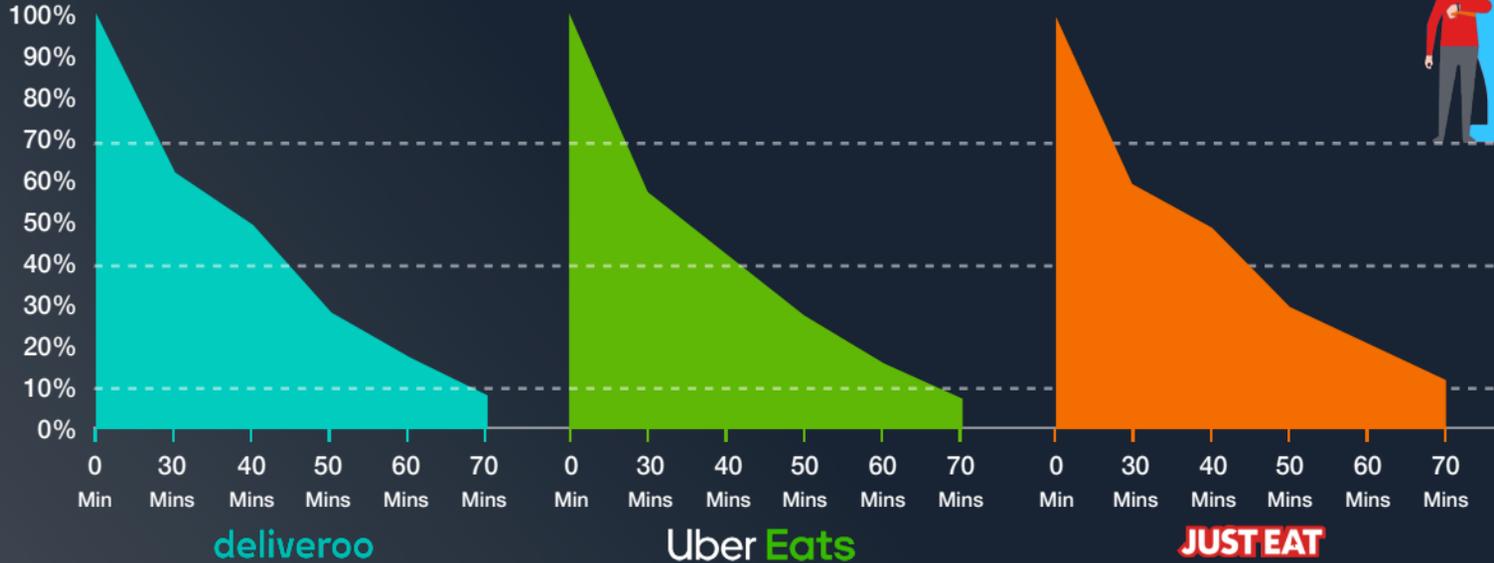
| | | |
|----------------------|----|----|
| Hounslow | 2% | 9% |
| Islington | 9% | 1% |
| Kingston upon Thames | 4% | 4% |
| Lambeth | 4% | 1% |
| Lewisham | 4% | 1% |
| Loughton | 2% | 0% |
| Luton | 0% | 1% |
| Merton | 0% | 0% |
| New Addington | 0% | 0% |
| Newham | 0% | 0% |
| Redbridge | 2% | 1% |
| Richmond upon Thames | 2% | 0% |
| Southwark | 9% | 1% |
| Sutton | 0% | 1% |
| Tower Hamlets | 9% | 4% |
| Waltham Forest | 0% | 0% |
| Wandsworth | 2% | 7% |
| Windsor | 2% | 0% |
| Other | 4% | 0% |

Will People Pay Extra For a Priority Delivery...



 Potentially due to their higher disposal income, **deliveroo** preferred users are more likely to buy a priority delivery. However, it is at around £2-2.50 when all users go below 10%

How Long Will UK Users Wait Before Complaining...



Just Eat users are more likely to be patient about how long it takes for their food to be delivered before complaining. Interestingly, over 1 in 10 would wait at least 70 minutes

What Do Users Mention as the Best Feature Recently Added...



Users consider the best new feature to be the ability to track their delivery in real time. Otherwise, there is nothing that stands out as a recent best feature...

What About Some New Competitive Features Users Would Like to Have...



Loyalty Scheme



**Order from multiple
restaurants but delivered
at the same time**



Accelerate your market intelligence with CitizenMe, contact us now!



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