

Uber
Eats



Platform Share
Report

takeanalytics

PeterBackman.

How delivery has changed

- Delivery has ramped up during covid with GMV sales growing in 2020 at 34.9% vs 2019 to reach £11.6billion.
- The major contributors to this growth have been the three aggregators covered in this Platform Share Report whose combined sales at GMV rose 49.2%. Others in the delivery segment including integrated delivery companies, such as Domino's, grew 10%.
- In the more immediate past covered in this report, the numbers of sites – signed up to JustEat, Uber Eats and Deliveroo - grew +11.7% between mid March and mid April, on the back of the reopening of hospitality for al fresco dining which has improved the viability of reopening for delivery as well. This increase is made up of venues new to delivery and sites that had to close down at an earlier part of the pandemic cycle.



Platform Competition

- It is notable that only 12% of venues – 10,171 – use all three platforms and this number has only grown by 1% during the most recent month.
- The number of sites exclusively on UberEats was 11,789 in March and that grew by +37%, to 16,187, in April. JustEat and Deliveroo grew their shared venues by +31%, to 6,246 (which is 7% of all venues).
- There are several reasons for these changes with perhaps the most notable being the differing rates of opening of their core venue types. JustEat focusing on independent operators, and takeaways, which have been amongst the most enthusiastic to reopen their venues, whereas Deliveroo has its heartland in the casual dining sector which is waiting to reopen when indoor dining is allowed in mid May.
- Overall, this report highlights the rapid evolution of restaurant delivery as the three main platforms battle it out for sales and market share while the eating out market ramps up its reopening programme.



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Number of Venues by Platform

- The table below details the number of venues by platform over time, both before and after lockdown. It can be seen that in April many of the venues re-opened.
- When comparing to the numbers prior to lockdown, the number of restaurants on delivery platforms continues to grow with an increase of 17.6% of total unique venues.

	Nov '20	Dec '20 - Jan '21	Mar '21	Apr '21	Variation (Mar - Apr)	Variation (Nov - Apr)
Unique Venues	72,368	78,430	76,236	85,132	+8,896 (+11.7%)	+12,764 (+17.6%)
Deliveroo	34,078	34,139	32,048	36,888	+4,840 (+15.1%)	+2,810 (+8.2%)
Just Eat	44,378	47,556	47,215	50,384	+3,169 (+6.7%)	+6,006 (+13.5%)
Uber Eats	29,818	32,657	34,208	38,871	+4,663 (+13.6%)	+9,053 (+30.4%)

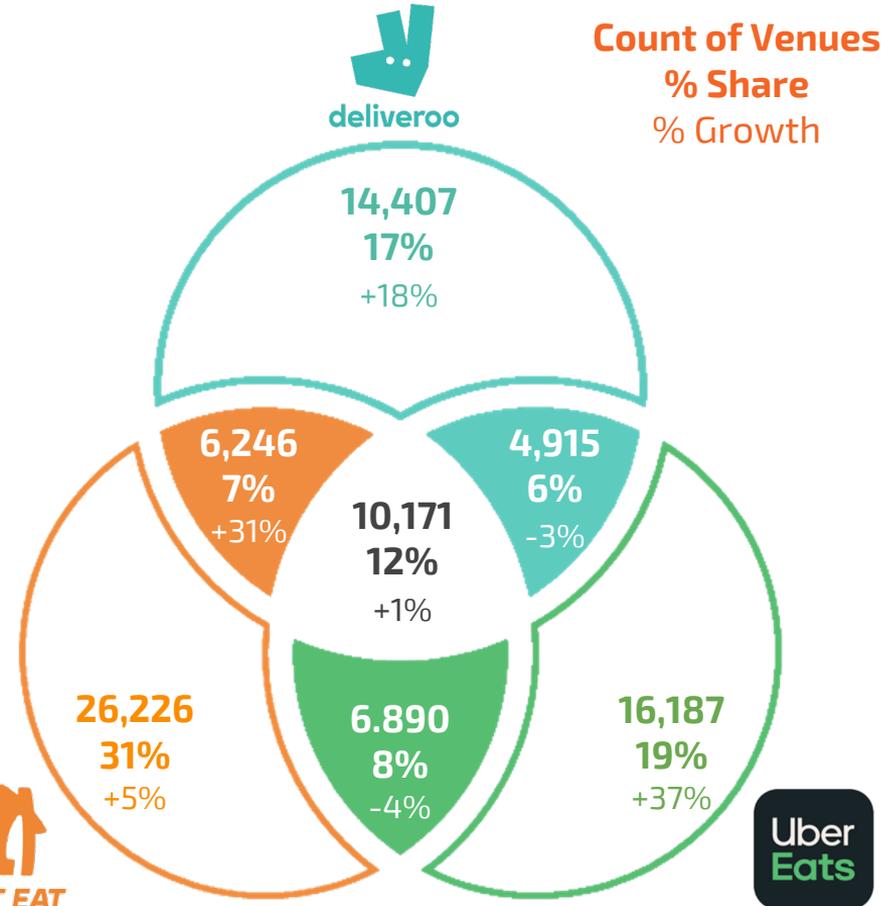
Share of Venues by Delivery Platform

This Venn diagram details the count of venues and share based on the number of platforms a restaurant or supermarket operates on. For example those venues in the centre of the diagram operate on all three platforms.

- The % growth numbers details the change in venue counts between April and 5th March.
- The total number of venues across the platforms has increased by 8,896*. An increase of 11.7% which will be as a result of venues reopening after lockdown.

Source: Takealytics, Matching based on postcode.
Venues offering delivery in the last 7 days, 16th Apr 2021

*This is the number of venues matched together so if a venue is on all three platforms this will count as 1.



Platform Share change over time

	Nov '20	Jan '21	Mar '21	Apr '21
On all Aggregators	9,539 (13%)	9,589 (12%)	10,051 (13%)	10,171 (12%)
Deliveroo (Exclusively)	13,694 (19%)	14,242 (18%)	12,168 (16%)	14,407 (17%)
Just Eat (Exclusively)	22,614 (31%)	26,035 (33%)	25,095 (33%)	26,226 (31%)
Uber Eats (Exclusively)	10,832 (15%)	11,820 (15%)	11,789 (15%)	16,187 (19%)
Deliveroo & Just Eat	4,890 (7%)	5,496 (7%)	4,765 (6%)	6,246 (7%)
Deliveroo & Uber Eats	4,739 (7%)	4,812 (6%)	5,064 (7%)	4,915 (6%)
Just Eat & Uber Eats	6,060 (8%)	6,436 (8%)	7,304 (10%)	6,980 (8%)
Unique Venues	72,368	78,430	76,236	85,132

Details count of venues and % share

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Promotional Activity by Platform

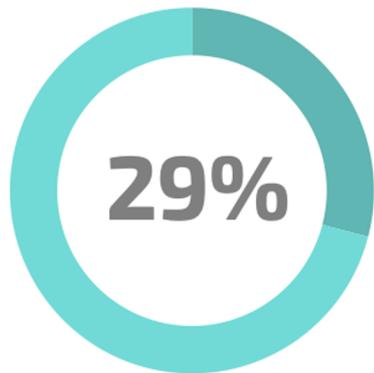
Promotional Activity by Platform

- The battle for market share continues and each platform has adopted a different focus for the Promotional Mechanics it employs based on information about what works for their specific types of customer. The information about promotional mechanics, in this report, is based on what appears on the restaurant page on the app – in future editions we may show others such as in-menu promotions.
- Right now, JustEat has a very strong focus on % *Discount* offers whereas UberEats favours *Spend £X Save £Y* offers, and Deliveroo uses both % *Discount* offers and *Meal Deals*. This is a constantly changing scene and we will return to it in future editions



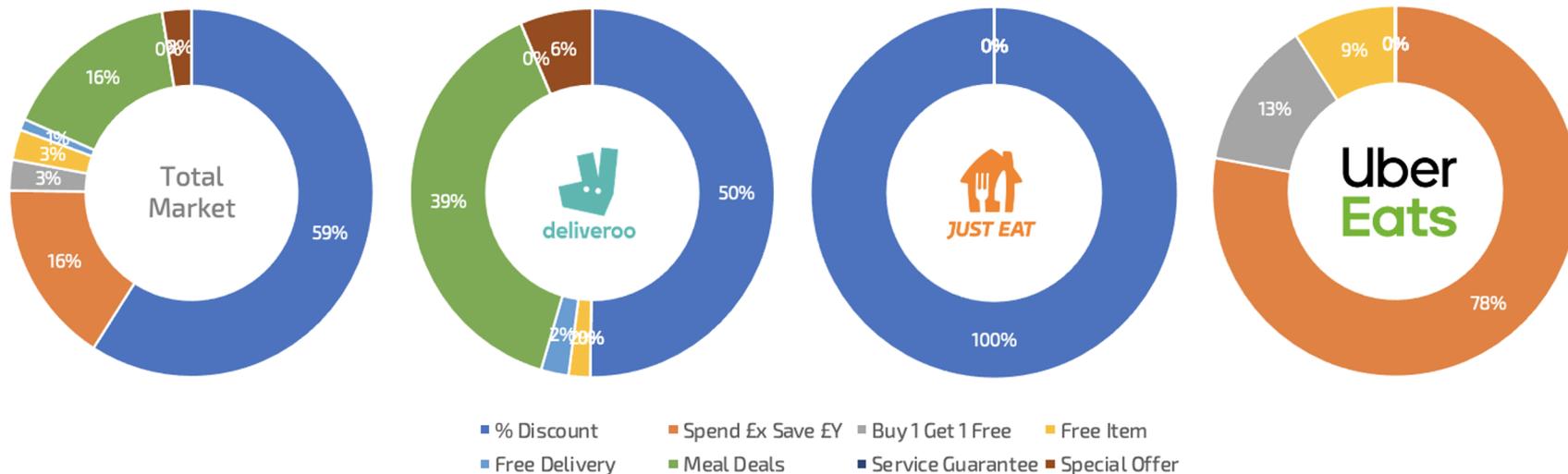
Promotional Activity by Platform

This chart shows the percentage of all venues on promotion by platform at the time of the analysis.



Promotional Mechanic by Platform

This chart shows the Promotional Mechanics used by each platform across all venues on promotion at the time of the analysis. Since January we have seen Deliveroo increase focus on % Discount promotions and a reduction in Meal Deal offers whilst Uber Eats have increased share of Spend £x Save £y and reduced Buy 1 Get 1 Free offers.



What is the Platform Share Report?

- **take**alytics collects data from 100k+ restaurants, supermarkets, brands and convenience stores (venues) across Deliveroo, Just Eat and Uber Eats every day.
 - Analysis and commentary by Peter Backman.
 - The Platform Share Report matches those restaurants across the platforms based on postcode and details their venue count and share (based on number of venues).
 - Data is based on venues which have been available for delivery in the 7 days prior to 16th April.
 - Data is compared to venues available in March.
 - The total number of venues has increased significantly over this time as restaurants reopen after lockdown with an overall increase in restaurants offering delivery since November of 17.6%.
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With real time data from 100k+ restaurants **take**alytics gives you the insights you need to optimise your takeaway business. Evaluate delivery time, reviews, stock, range, pricing and promotions across all platforms in one place.

www.takealytics.com

Peter Backman.

Peter is an expert on the structure and dynamics of the foodservice sector, and its supply chain, in the UK, across Europe, and in other major international regions and countries including the USA and India. He enlightens senior executives and other people who make significant decisions in the foodservice sector including investors, operators and suppliers to the sector.

His forthright and challenging views are based on data-driven insights – as a former scientist his view is “if you can't measure it, it doesn't exist”. He has been involved, as a researcher and consultant within the sector, for over 30 years blending his knowledge with a deep understanding of the trends, key players and challenges of organisations with an interest in foodservice.

He regularly speaks at conferences worldwide and his views are sought by television, radio, and the press. Peter has many innovations to his credit having been the first person to define the structure of the eating out market in the terms which are now widely used by the industry, as well as the most extensive database model of the foodservice sector.

Peter is the author of “Restaurants also sell food” – published in London, Toronto and Chicago

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