

Share of stomach report

Understanding what Deliveroo customers want



January 2021



intro

We surveyed our UK customers to understand their mindset around food and how it's changed over the last 12 months.

The Share of Stomach report gives a unique insight into how consumers are feeling, and key opportunities for restaurants to support their businesses.



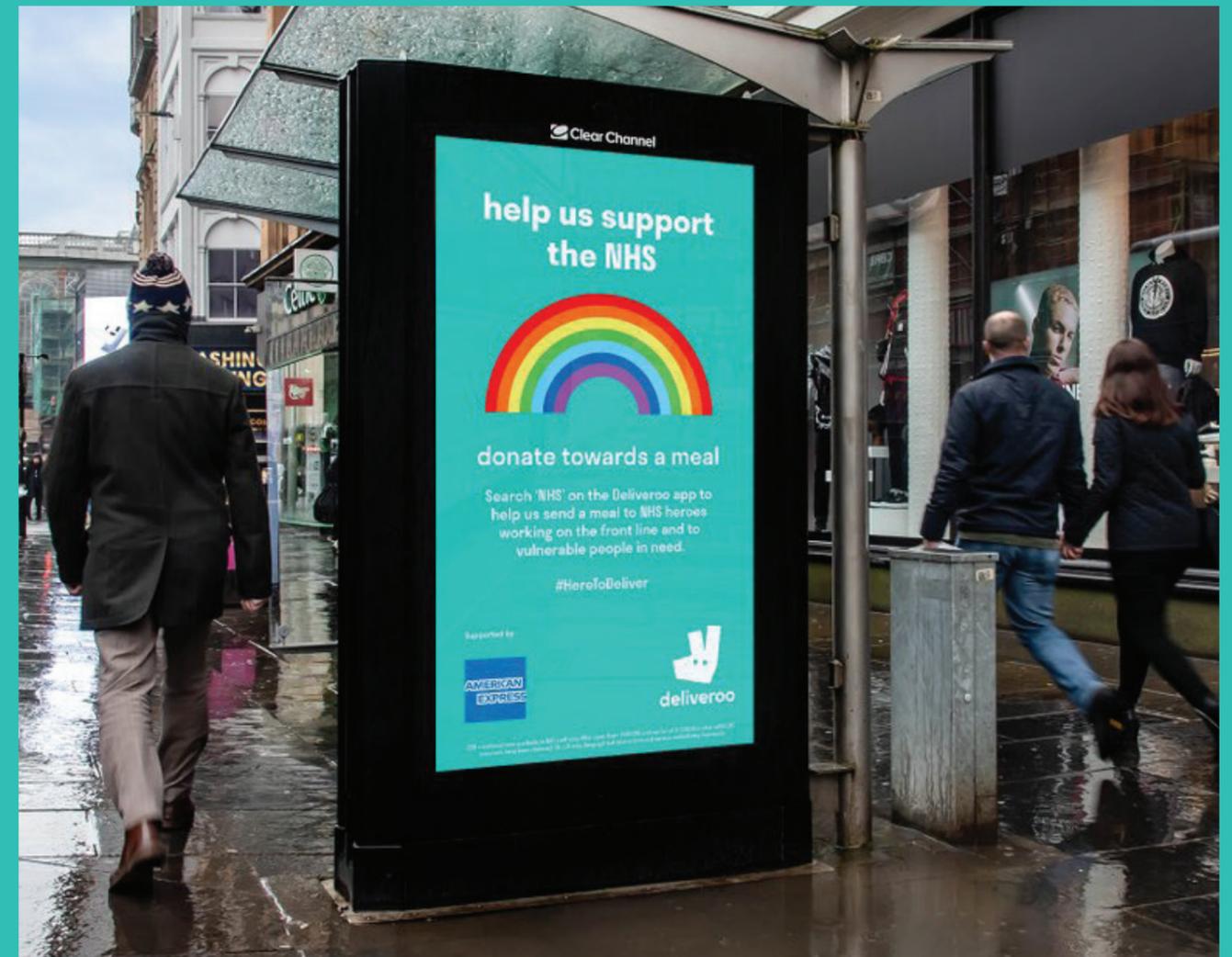
“We found a focus on mental wellbeing, and a desire to find comfort during difficult times with Deliveroo.”

Time pressures, stress and ‘cooking fatigue’ mean more customers than ever are ordering delivery.”

**– Nicola Longfield,
Vice President, Restaurants**

our food community

- **80%** of customers want to support local businesses – our **#HereToDeliver** campaign helped to connect local restaurants and their customers during the pandemic
- Around **20,000** new UK restaurant partners joined Deliveroo during 2020
- Nearly **£2 million** has been raised by Deliveroo partners and customers, delivering over 800,000 meals to NHS workers



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customer attitudes

Finding joy and supporting local businesses

Highlights

- **85%** of customers say they will order delivery the same amount or more often than they did before the pandemic
- **68%** of customers have reported feeling worried about their mental health
- **65%** agree they're spending more on takeaways, to give themselves something to look forward to
- **43%** of parents say they have less free time than before the pandemic
- **14%** of customers say they look for vegetarian or vegan options



customer attitudes

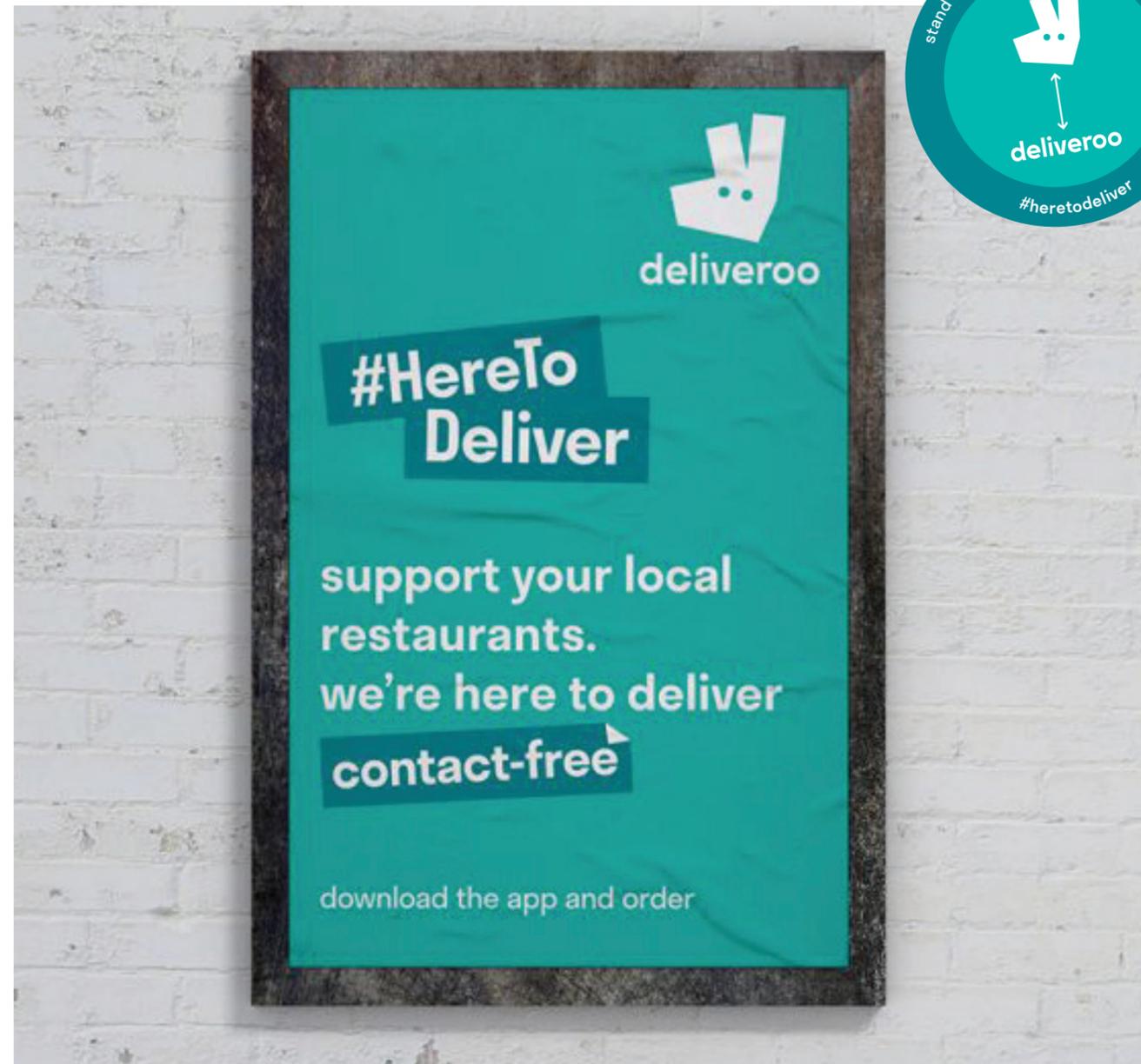
Finding joy and supporting local businesses

Pandemic restrictions have been hard on the hospitality industry but our partners have been quick to adapt. Deliveroo partners have pivoted to delivery-focused kitchens, offered meal kits and used **Pickup** or **Table Service** to keep up orders.

We know 80% of our customers want to support businesses in their community.

They also want to recreate the emotional experience of eating in a restaurant. **Delivery** allows customers to support their favourite restaurants and treat themselves at the same time.

Families, in particular, appreciate the convenience of Delivery, with 43% of families disagreeing that they have more free time than before the pandemic.

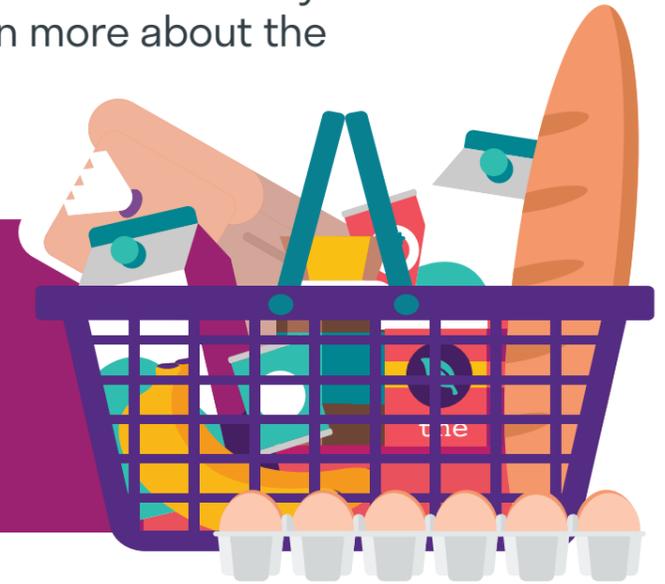


50% of customers ordered meal kits 'as a treat'

D.I.Y meal kit deliveries, with prep instructions let your customer recreate their favourite takeaway or dine-in dishes at home, and learn more about the quality ingredients you use.

Why not try it?

Of the customers we surveyed, 15% had ordered a meal kit on Deliveroo, with Friday night being the most popular time.



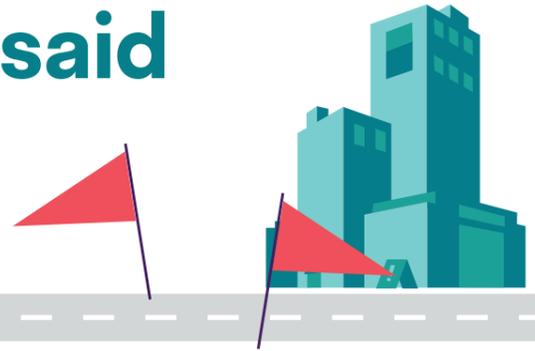
do you want fries with that?

The UK's most popular menu add-ons

Item	Orders
Fries	16m
Extra cheese	14m
Rice	11m
Chips	11m
Wings	4m
Salad	4m
Veggies	3m
Halloumi	3m
Garlic Bread	3m
Gravy	3m



what our customers said



“I’ve really enjoyed getting to know all the restaurants in my area through Deliveroo.”
– Grace, Staines



“While I love going out to eat, and I actually really miss it, it’s great having my favourite food without having to get dressed up.”
– Claudia, West London

“Ordering delivery is part of my routine now. I never realised how easy it is to get good food delivered.”
– Sebastien, Bristol



“When it’s safer to do so, the extra effort of eating out will be worth it to support front of house staff that have been really badly affected by lockdown measures.”
– Lianne, South London



“We’ve re-evaluated our lifestyle over the last 9 months and prioritised safety and treating ourselves when we want.”
– Juan, Liverpool



“I like the convenience of delivery and it isn’t always easy to get out and about due to childcare.”
– Glynn, West London

To protect their privacy, we’ve changed the names of survey respondents quoted here

cuisine insights

What customers want more of and why

We looked at what customers order, what they consider ordering and what might convince them to order more.

You can use this section to understand your existing customers better, and what new customers might be looking for.



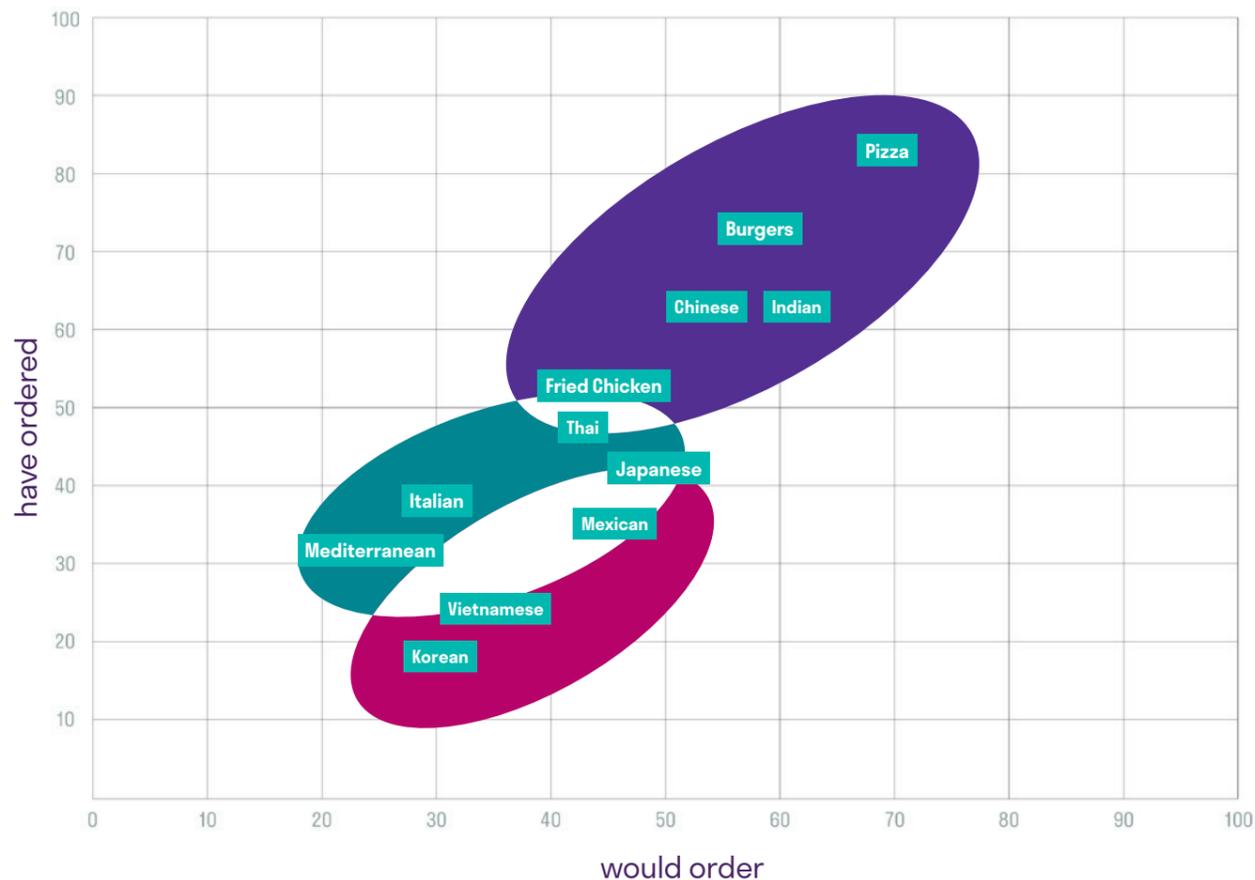
Demand for cuisines typically found in cities and urban areas – like Korean, Vietnamese and Mexican – is strong. Customers working from home in suburban areas say they can’t always access these for delivery.

understand your delivery customers

Learn more about the appetite profiles of your existing customers – they may be different to who you see in your restaurant – and find out how to encourage new customers to order, based on their feedback.



Grouping cuisines based on demand



the favourites

These are 'staple' cuisines for **Delivery**, and are often highly competitive.

Stand out from the crowd and build customer loyalty by creating offers in **Marketer**, Deliveroo's promotional tool for partners. Quality packaging and ingredients make a difference too – our Packaging and Supplies team can help you source the best products at the best price.



BURGERS

Improve packaging and 'travelability'
 "Nothing worse than a soggy burger bun."
Edward, Edinburgh

CHINESE

Focus on quality and boosting customer ratings
 "I don't know which Chinese restaurants around me do good quality food."
Simon, West London

FRIED CHICKEN

Improve packaging and 'travelability'
 "Fried chicken needs to be hot so I would usually go and buy it myself."
Paul, Bristol

INDIAN

Set yourself apart with special menu items and clear labelling for vegan and vegetarian options
 "I like to try new things and I find a lot of Indian restaurants are quite traditional."
Henry, Nottingham

PIZZA

Set yourself apart with special menu items or 'Chef's Choice' dishes
 "Pizza is great but with all these other options available now, it's not as exciting."
Katie, Guildford

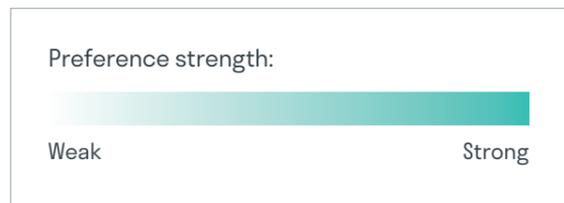
Age	Gender	Parents	Most popular in
Under 35	Male	No	Midlands
Over 35	Female	Yes	South East
Under 35	Male	Yes	South West & Wales
Over 35	Female	Yes	Midlands
Under 35	Female	No	Midlands

under served cuisines

These are in-demand cuisines but are often under served in suburban areas.

If you're not a Deliveroo partner yet, sign up at restaurants.deliveroo.com

We can help you build your **Delivery** brand and give you the tools to grow your business.



KOREAN

"My favourite Korean places are in central London and I don't know any around where I live."

Jill, West London

MEXICAN

"I love Mexican food, but there aren't any options other than a burrito place. I would love a proper Mexican restaurant delivery."

Max, Cheltenham

VIETNAMESE

"Limited places offer Vietnamese food around my postcode and the ones that do tend to take a long time to deliver."

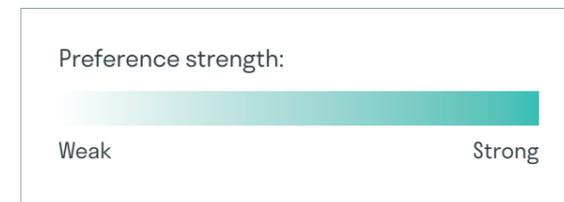
William, Birmingham

Age	Gender	Parents	Most popular in
No Bias	Female	No Bias	London
Under 35	Female	No	South East
Over 35	Female	No	London

opportunity cuisines

These are cuisines which customers enjoy but might not be their 'go-to' option.

Use our in-store marketing to let customers know you're on Deliveroo, or run targeted promotions on **Marketer** to reach new customers. We can help with professional photography for your menu too.



THAI

Offer value for money with meal bundles and promotions for solo diners

"You have to build a meal so it gets to be quite a lot quite quickly. I have to order too much for one person."

Emily, Reading

JAPANESE

Create customer offers and special discounts

"Japanese is definitely a big treat because it's very expensive in the UK."

Chatri, South London

ITALIAN

Make your menu shine with great photography

"I would definitely order Italian food, but nothing seems to jump out at me when scrolling through the food options."

Ally, Croydon

Age	Gender	Parents	Most popular in
Over 35	Female	No Bias	Midlands
Under 35	Female	No	London
Over 35	Female	Yes	London



what our partners said



“When lockdown was first announced in March, we had to adapt and change our business model. Overnight we turned into an online-only restaurant.”

In the months since, we used all of our resources to expand into Editions kitchens, as a safe way to continue trading through volatile conditions.

We launched alone zones in our kitchens to minimise movement and contact between our staff, as well as offering Deliveroo voucher codes for our team to order food at home.

Throughout this time we have managed to keep furloughed members at a minimum.

The most important thing is that we've not been afraid of change. We're always on our toes ready to continue adapting.”

**Tim Vasilakis, Owner,
The Athenian**



Winner of Deliveroo
Restaurant of the Year,
Best Editions Restaurant



“Many of our regular customers switched from dine-in to Delivery during the pandemic.”

“We often recognise familiar names as their orders come in on Deliveroo. We know our customers choose us over the competition because they specifically like what our chefs do – and they expect the same high quality cooking and ingredients for their Delivery orders.”

Our top priority is keeping customers happy. We make sure delicate dim sum is delivered without delays, so it arrives warm and undamaged.”

**Peter Chan, Manager,
Royal China Club London**



conclusion

As we all adjust to the 'new normal', food delivery continues to be important for customers.

Deliveroo orders have helped customers to cope during lockdowns, and experiences which recreate the feeling of dining in offer an exciting, profitable avenue for partners to explore.

Lifestyle changes caused by the pandemic have led to new opportunities. An increase in customers working from home has created demand for certain cuisines in some suburban areas.

In adapting to new expectations, partners can create new revenue streams and increase sales, while COVID restrictions and customer safety concerns continue.

Deliveries, DIY meal kits, and live cook-a-longs are a way for customers who aren't going out on a Friday to reward themselves. And time-pressured families with 'cooking fatigue' rely on the convenience of food delivery.

Though the industry has been hit hard by COVID restrictions, customers overwhelmingly want to support their local restaurants.

By developing more positive food delivery experiences, partners can connect with their communities, building a loyal customer base in the long term.

