Market share data in the United Kingdom

November 2020
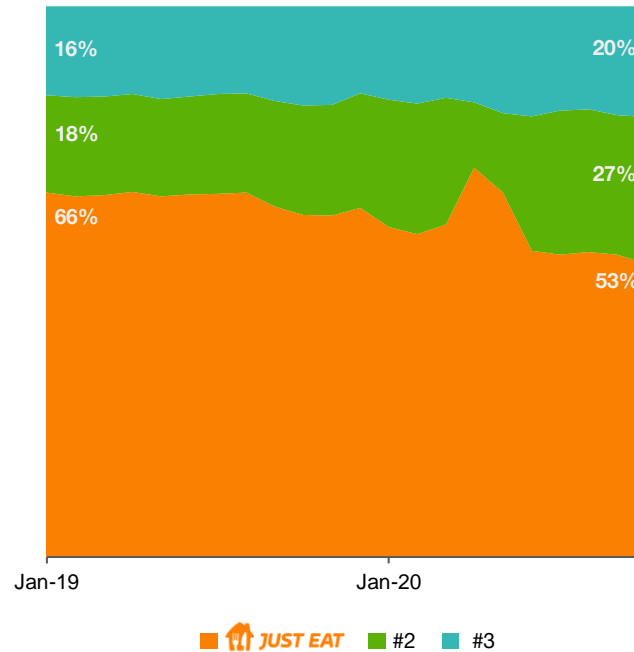
Leading market share in the UK

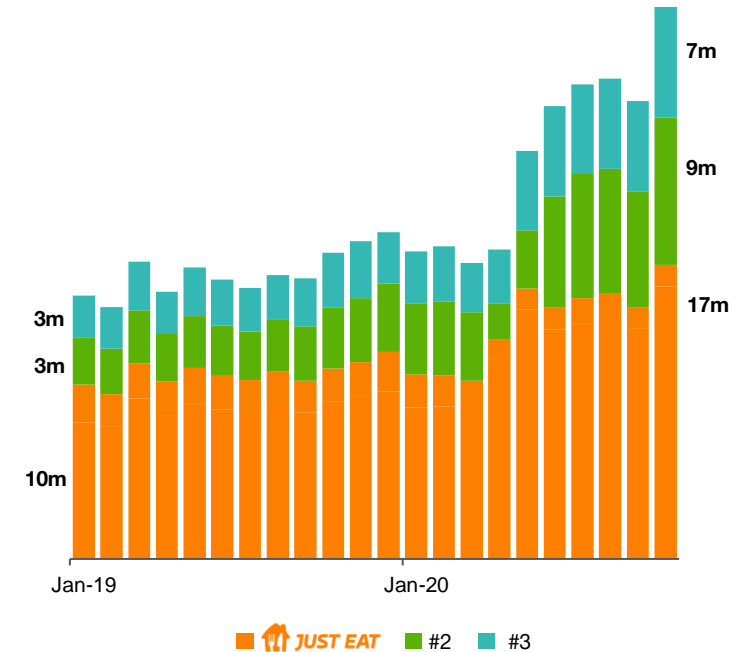## Google trends[1]

18%
11%
71%
18%
22%
60%

Jan-19   Jan-20

🏠 JUST EAT   #2   #3
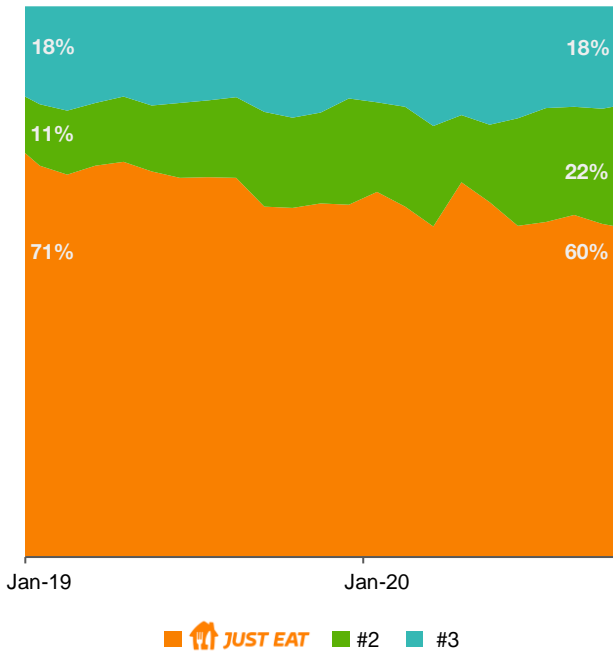
Relative market share %[2,3]
#2 & #3 includes grocery

16%
18%
66%
20%
27%
53%

Jan-19   Jan-20

🏠 JUST EAT   #2   #3

Absolute transactions[2,3]
#2 & #3 includes grocery

7m
9m
17m

3m
3m
10m

Jan-19   Jan-20

🏠 JUST EAT   #2   #3

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Voucher-driven growth of competition with low average order values

Discounted vs non-discounted transactions%[1,2]

Legend:
— #2 discounted transactions % ■ #2 non-discounted transactions ■ #2 discounted transactions
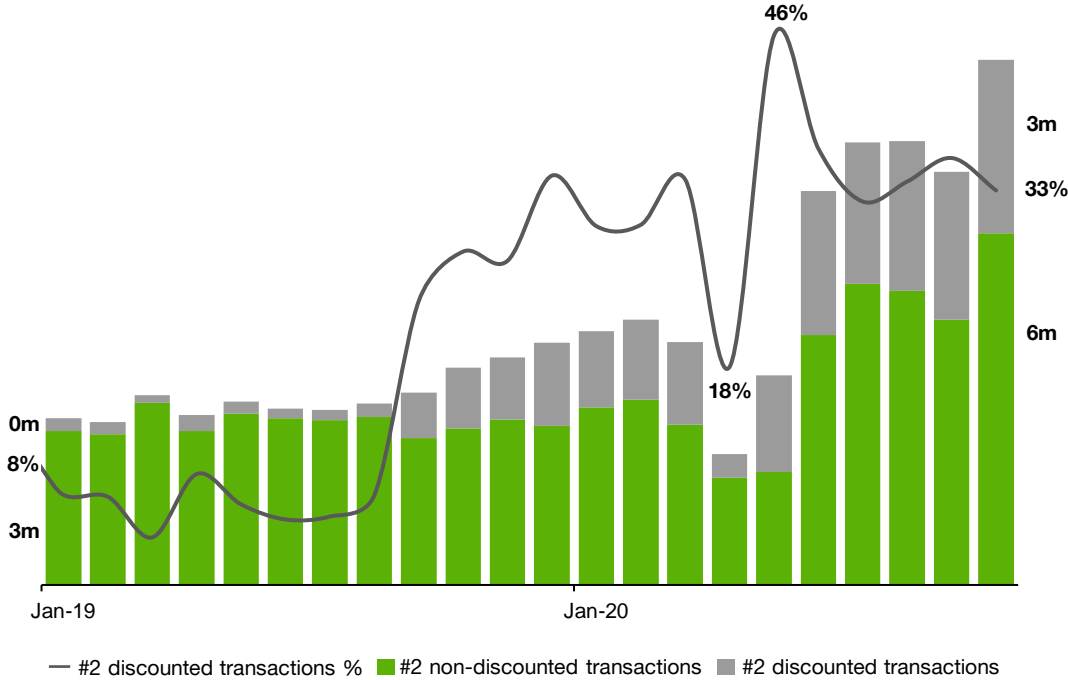
Average order value including delivery fee (£)[1,2,3]

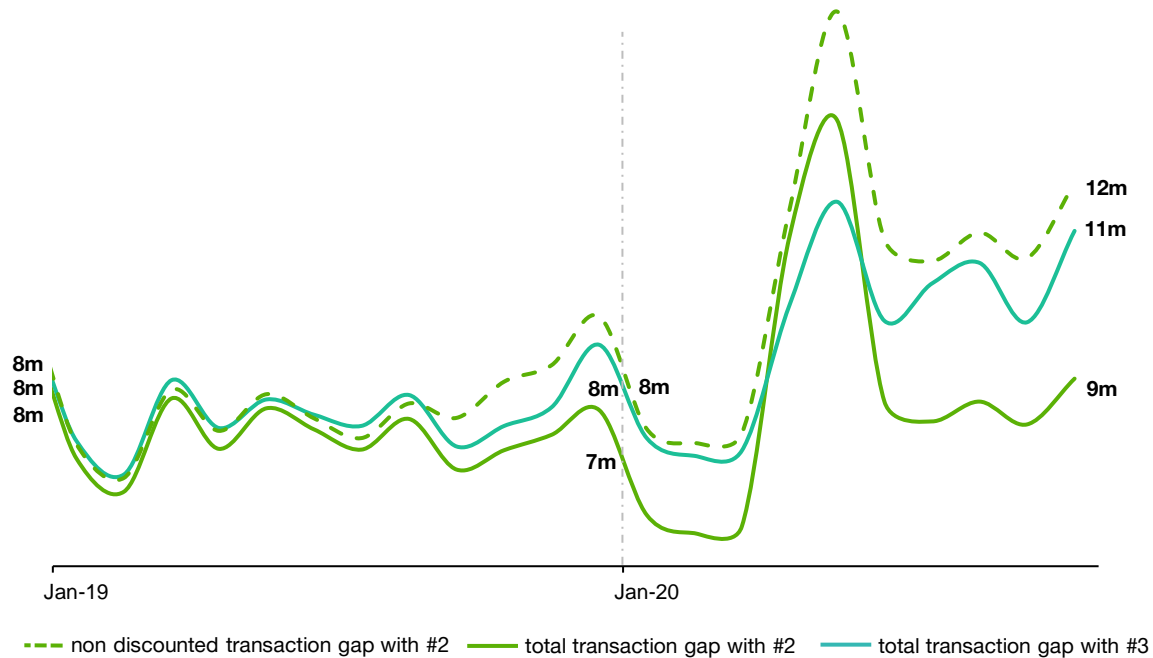Legend:
■ JUST EAT ■ #2 ■ #3
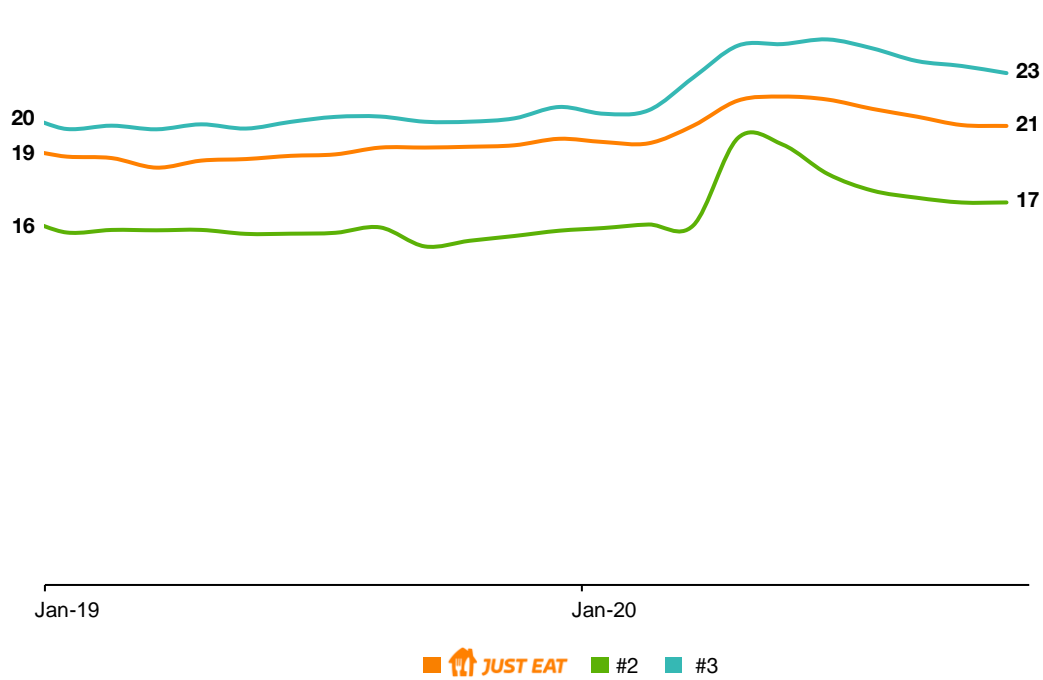
Source:
1 Transaction volumes and values measured by Cardlytics credit card transactions for the period January 2019 to October 2020, with transaction volumes for all competitors scaled. The proportion of discounted transactions is based on Fox Intelligence data
2 #2 and #3 includes grocery
3 Average order value taken from Cardlytics credit card data as the total transaction charge

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Despite voucher-driven growth of competitor, the gap in absolute orders is widening

Absolute gap between Just Eat and competitors[1,2]
#2 & #3 includes grocery

12m
11m
9m
8m
8m
8m
8m
8m
7m

Jan-19
Jan-20

- - - non discounted transaction gap with #2 —— total transaction gap with #2 —— total transaction gap with #3

- The absolute gap between Just Eat and #3 has widened by **3m** transactions since January 2019 and by **3m** transactions since January 2020

- The absolute gap between Just Eat and #2 has widened by **1m** transactions since January 2019 and **2m** transactions since January 2020 despite much heavier and deeper discounting

- The gap between Just Eat total transactions and #2 non discounted transactions has widened by **4m** since January 2019 and by **4m** since January 2020

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