Family Dinneroo

Dish Analysis

December 2025
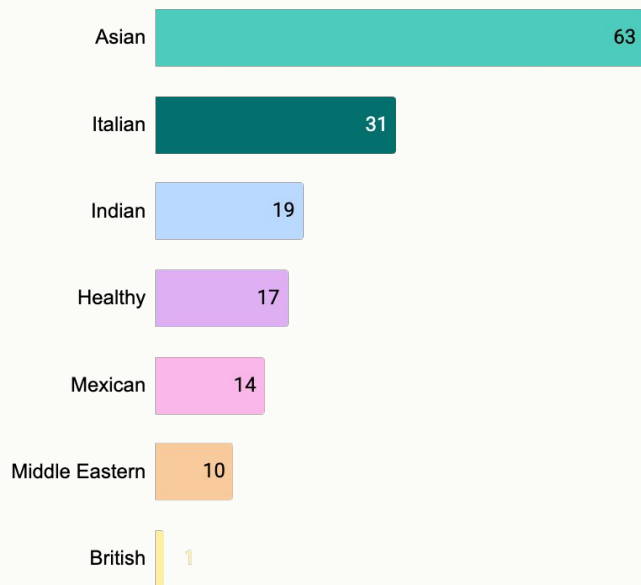
deliveroo

In aggregate, we offer c.155 [1] Family Dinneroo dishes, with a strong skew towards Asian and Italian cuisines and dish groups
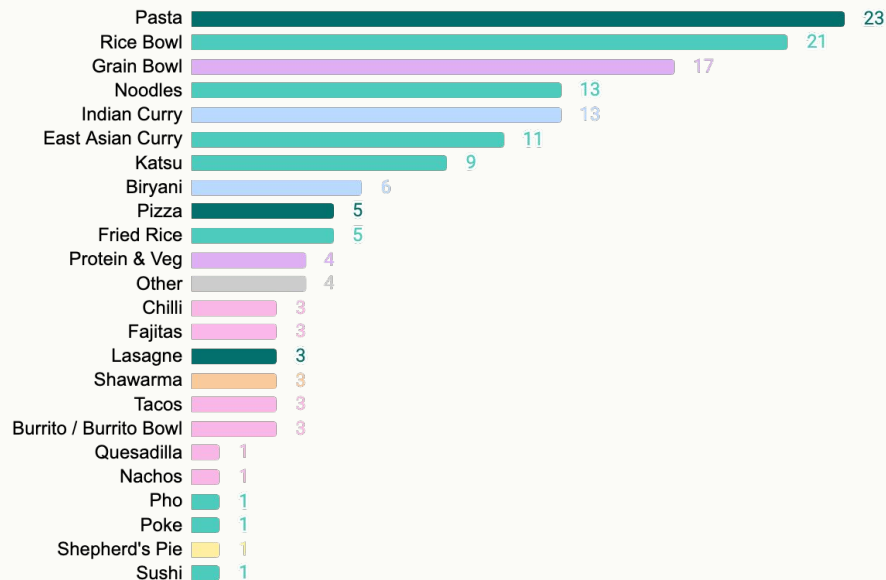
Dish by Cuisine (# Dishes)
As at 12-Dec

Cuisine	# Dishes
Asian	63
Italian	31
Indian	19
Healthy	17
Mexican	14
Middle Eastern	10
British	1

Dish by Dish Group[2] (# Dishes)
As at 12-Dec

Dish Group	# Dishes
Pasta	23
Rice Bowl	21
Grain Bowl	17
Noodles	13
Indian Curry	13
East Asian Curry	11
Katsu	9
Biryani	6
Pizza	5
Fried Rice	5
Protein & Veg	4
Other	4
Chilli	3
Fajitas	3
Lasagne	3
Shawarma	3
Tacos	3
Burrito / Burrito Bowl	3
Quesadilla	1
Nachos	1
Pho	1
Poke	1
Shepherd's Pie	1
Sushi	1

1. Dish counts are based on the number of listed items. Where bundles offer a choice of 2+ distinct dish types (e.g. noodle dishes, rice bowls, or curries), each option is counted as a separate item.
2. Colours indicate the predominant cuisine. This mapping is not one-to-one; e.g. "Grain Bowls" appear under both "Healthy" and "Middle Eastern" cuisines.
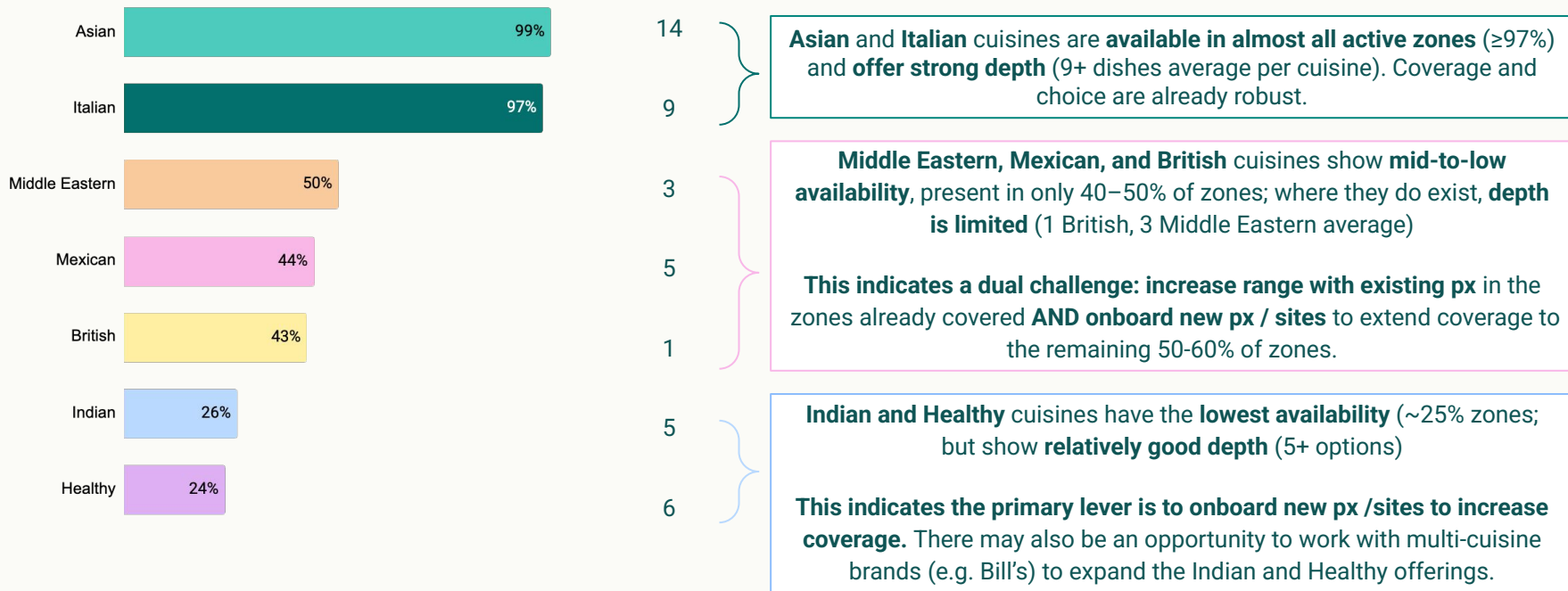
At the zone level, Asian and Italian continue to dominate on both breadth and depth of coverage

Zone Cuisine Coverage (% of Active Zones with ≥1 Dish per Cuisine)
As at 12-Dec

Average Number of Dishes per Zone
(Zones with ≥1 Dish Only)

Cuisine	Coverage	Avg Dishes
Asian	99%	14
Italian	97%	9
Middle Eastern	50%	3
Mexican	44%	5
British	43%	1
Indian	26%	5
Healthy	24%	6

Asian and **Italian** cuisines are **available in almost all active zones** (≥97%) and **offer strong depth** (9+ dishes average per cuisine). Coverage and choice are already robust.

Middle Eastern, Mexican, and British cuisines show **mid-to-low availability**, present in only 40–50% of zones; where they do exist, **depth is limited** (1 British, 3 Middle Eastern average)

This indicates a **dual challenge: increase range with existing px** in the zones already covered **AND onboard new px / sites** to extend coverage to the remaining 50-60% of zones.

Indian and Healthy cuisines have the **lowest availability** (~25% zones; but show **relatively good depth** (5+ options)

This indicates the **primary lever is to onboard new px /sites to increase coverage.** There may also be an opportunity to work with multi-cuisine brands (e.g. Bill's) to expand the Indian and Healthy offerings.
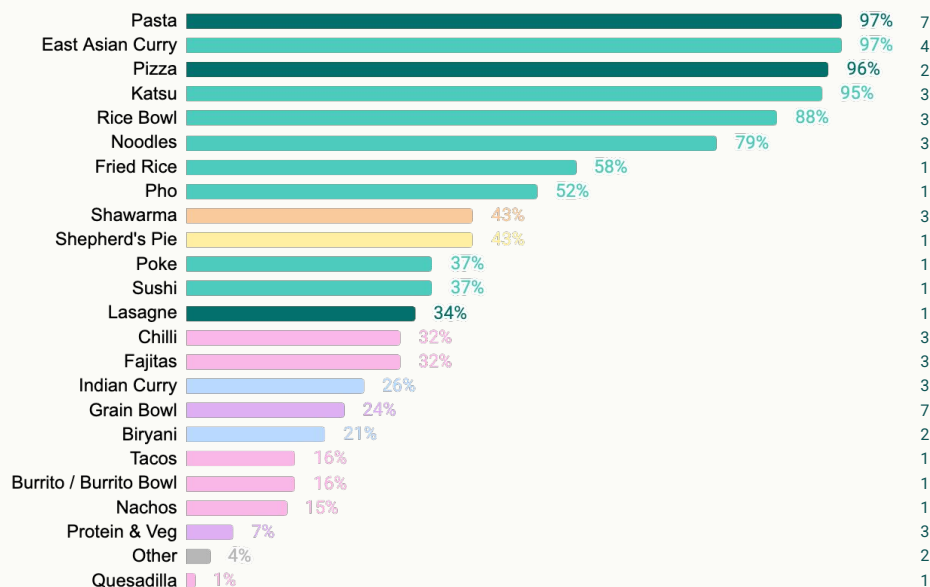
This is reflected at dish level, with East Asian curries, rice, noodles, pasta & pizza well covered, while other dishes remain underrepresented

Zone Dish Coverage (% of Active Zones with ≥1 Dish)
As at 12-Dec

Average Number of Dishes per Zone
(Zones with ≥1 Dish Only)

Dish	Coverage	Avg Dishes per Zone
Pasta	97%	7
East Asian Curry	97%	4
Pizza	96%	2
Katsu	95%	3
Rice Bowl	88%	3
Noodles	79%	3
Fried Rice	58%	1
Pho	52%	1
Shawarma	43%	3
Shepherd's Pie	43%	1
Poke	37%	1
Sushi	37%	1
Lasagne	34%	1
Chilli	32%	3
Fajitas	32%	3
Indian Curry	26%	3
Grain Bowl	24%	7
Biryani	21%	2
Tacos	16%	1
Burrito / Burrito Bowl	16%	1
Nachos	15%	1
Protein & Veg	7%	3
Other	4%	2
Quesadilla	1%	1

Asian and Italian dishes dominate on both breadth and depth of coverage, with particularly strong representation across East Asian curries, katsu, rice bowls, noodle dishes (Asian) and pasta and pizza (Italian)

Dishes like **shawarma** and **shepherd's pie** have **moderate breadth** driven by px like Bill's offering them

Lasagne underperforms relative to other Italian staples, despite being a family favourite

Mexican, Indian, and Healthy dishes show constrained breadth, in part due to the limited geographic footprint of px

We propose a zone MVP of 5+ px, 5+ cuisines, 20+ dishes

5+ Px

5+ Cuisines

20+ Dishes

Fran to fill out rationale with data on RHS
We should have data that shows variety complaints decrease a lot after 20+ dishes, 5+ px, 5+ cuisines

Currently, X zones meet all 3 criteria, with the primary shortfall in cuisine breadth

| 5+ Px | 5+ Cuisines | 20+ Dishes | All 3 Criteria |

90%   90%   90%   90%

Anna to fill out at end - dummy data

10%   10%   10%   10%

Availability alone is not sufficient - specific dishes also matter; thus, alongside MVP criteria, we have defined a set of minimum dishes by zone

Dish Group	Description	Example Dishes	Requirement
Core Drivers	Dishes with both **high customer demand and strong preference**	Indian Curry Protein & Veg Noodles	**100% coverage of these dishes**
Demand Boo...			...es ...e ...to
Preference Builders	**lower demand** (loved by those who try them, but not widely discovered)	Lasagne Fajitas Shawarma	...es Invest in merchandising to drive demand.

Anna and Fran to fill out at end - once we have the 'final' ratings by dish
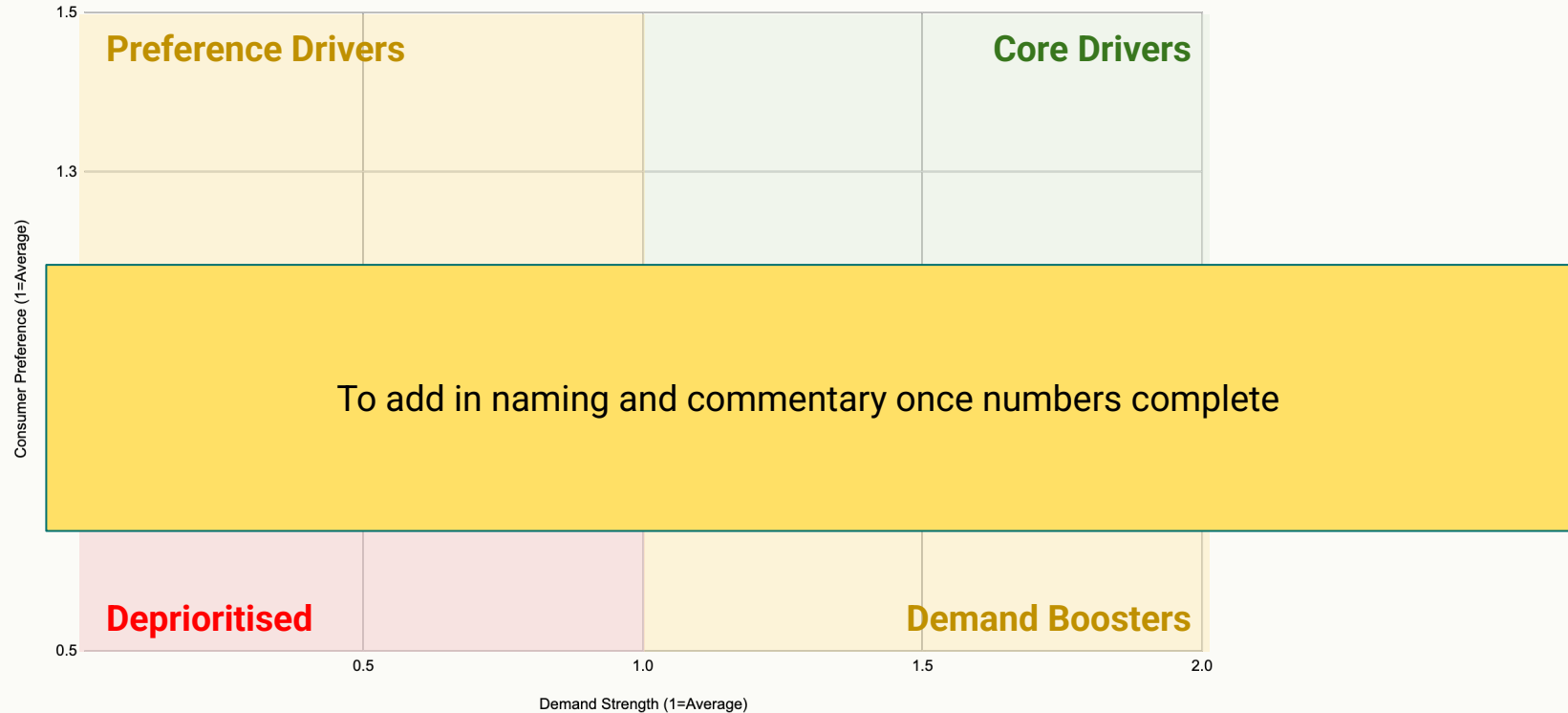
We have grouped dishes by overall attractiveness, using a combination of demand signals and customer preference indicators

Grouping	Measure	Description	Source	Weight	Rationale
Demand Indicators	**Average Sales per Dish** *(Existing Dishes Only)*	Total orders for the dish divided by the number of times it is listed (accounting for both variations in dish and number of zones it is listed in).	Looker		**Indicates demand for dish,** normalised for availability
	% of Relevant Zones Where Dish Ranks Top #5 *(Existing Dishes Only)*	Percentage of zones in which the dish is a top 5 selling item, considering only zones where the dish is available	Looker		**Indicates demand for dish,** normalised for both availability and zone-level demand differences (e.g. higher baseline volumes in Core London zones)
	Open-Text Requests for Dish *(All Dishes))*	[Fran to edit: Number of times a dish is mentioned when customers are asked what they would like to see added]	Post-Launch Survey		[Fran to edit: Captures explicit unmet demand for dish]
Consumer Preference Indicators	**Deliveroo Rating** *(Existing Dishes Only)*	Average rating for the dish on Family Dinneroo orders	Looker		Measures overall consumer satisfaction with the dish
	Meal Satisfaction Score *(Existing Dishes Only)*	Percentage of cx who report being "satisfied" or "very satisfied" with the dish	Post Order Survey		
	Repeat Intent Score *(Existing Dishes Only)*	Percentage of customers who are "likely" or "very likely" to order the same dish again	Post Order Survey		
	Dish Suitability Rating *(New Dishes Only)*	[Fran to edit: Suitability score out of 5 based on frequency of consumption, difficulty to cook at home, and desire to see the dish on the app]	Pre-Launch R&I Research		[Fran to edit: Provides early, survey-driven insight into consumer appeal of dish]

We have identified X Core Driver dishes, Y Preference Drivers and Z Demand Boosters; ZZ can be deprioritised

Preference Drivers

Core Drivers

To add in naming and commentary once numbers complete

Deprioritised

Demand Boosters

Consumer Preference (1=Average)

Demand Strength (1=Average)

1.5

1.3

0.5

0.5   1.0   1.5   2.0

		Demand Indicators				Consumer Preference Indicators				Demand Strength	Consumer Preference
		Average Sales per Dish	% of Relevant Zones Where Dish Ranks #1	% of Relevant Zones Where Dish Ranks Top #5	Open-Text Requests for Dish	Deliveroo Rating	Meal Satisfaction Score	Repeat Intent Score	Dish Suitability Rating		
	Pasta	8	1%	25%		4.2	78%	74%	2.5	0.6	0.9
	Rice Bowl	29	11%	41%		4.4	84%	77%	2.5	1.2	1.0
	Grain Bowl	21	4%	18%		4.7	86%	90%	2.5	0.7	1.0
	Noodles	28	2%	37%		4.5	88%	88%	2.5	1.2	1.0
										2.9	1.1
										0.9	1.0
										1.2	1.0
										2.5	1.0
										1.0	0.9
										1.0	1.0
	Fried Rice	41	4%	17%		4.5	79%	81%	2.5		
Dishes on Dinneroo	Protein & Veg	44	6%	44%		4.4	71%		3.5	1.6	0.9
	Chilli	6	0%	5%		3.8			3.3	0.2	0.9
	Fajitas	9	2%	12%		4.2	96%	100%	2.5	0.4	1.1
	Lasagne	13	4%	22%		4.6	77%	75%	3.3	0.6	0.9
	Shawarma	10	1%	10%		4.5	90%	86%		0.3	1.0
	Tacos	7	0%	18%		4.1			3.2	0.4	0.9
	Burrito /										

Update with final data

Add commentary explaining what we're seeing

Very few zones meet these dish-level criteria today, highlighting a material gap in our ability to meet consumer demand

Anna to fill out at end - once we have the 'final' ratings by dish

Several high level themes emerge

Anna and Fran to fill out at end - once we have the 'final' ratings by dish

To strengthen dish supply, we can broaden the range with existing partners, but we will also need to onboard new ones

Wagamama								
PizzaExpress								
Pho								
Bill's								
Giggling Squid								
Prezzo								
Itsu								
Bella Italia								
Las Iguanas								
Iro Sushi								
Banana Tree								
LEON								
Dishoom	18%			x				
Kokoro	17%	x						
Zambrero UK	15%					x		

Anna to neaten and add commentary

Purpose = to show there are very few brands that have a lot of coverage AND can do multiple cuisines (basically bills and leon)
Therefore we can work with existing px, but we also need to onboard new px

Against each dish, we have mapped the coverage gaps and next steps (this can also be seen at the zone level HERE)

		Demand Strength	Consumer Preference		Coverage Gap	Next Steps
	South Asian / Indian Curry	2.9	1.1		74%	Work with Bills, Leon to introduce curry menu Add new Indian rx
Core Drivers						u more similar
						le available
Preference Dr						
Demand Boos						tein and veg
	Pasta	0.6	0.9		3%	Deprioritised
	Tacos	0.4	0.9		84%	Deprioritised
Deprioritised	Chilli	0.2	0.9		68%	Deprioritised
	Burrito / Burrito Bowl	0.1	#DIV/0!		84%	Deprioritised

To fill in once we've done groupings
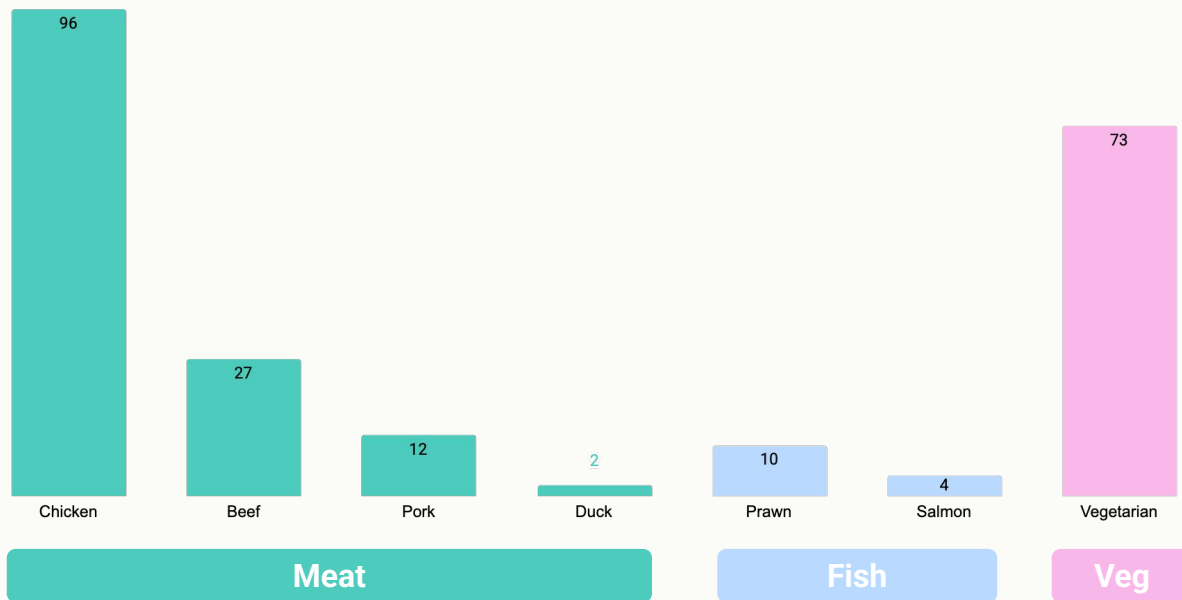For each group show the coverage gap and suggest next steps

Appendix >>>

Chicken options dominate, while other meats, fish, and vegetarian choices are less well represented

Dish by Protein / Vegetarian Option (# Dishes)
As at 12-Dec

96 — Chicken
27 — Beef
12 — Pork
2 — Duck
10 — Prawn
4 — Salmon
73 — Vegetarian

Meat   **Fish**   **Veg**

1. Sums to >155 as certain dishes offer >1 protein / vegetarian option