



CHECK BREAKDOWN:

Audience: 800+ Consumers

TREND CHECKS

FOOD DELIVERY USAGE FLAT Q/Q

Food delivery engagement has been tracking flat q/q though activity is improved y/y.

MARKET SHARE | JUST EAT IN THE LEAD

Just Eat remains the top food delivery app in our trackers. Notably, Deliveroo activity has improved q/q and it has narrowed the gap in our trackers over time.

SENTIMENT | JUST EAT LEADS

Just Eat leads the pack when it comes to user assessment of overall experience and restaurant selection/options.

RESPONDENTS EXPECT USAGE TO MEAN REVERT

Respondent feedback has held steady when it comes to forecasted usage of food delivery apps post Covid.

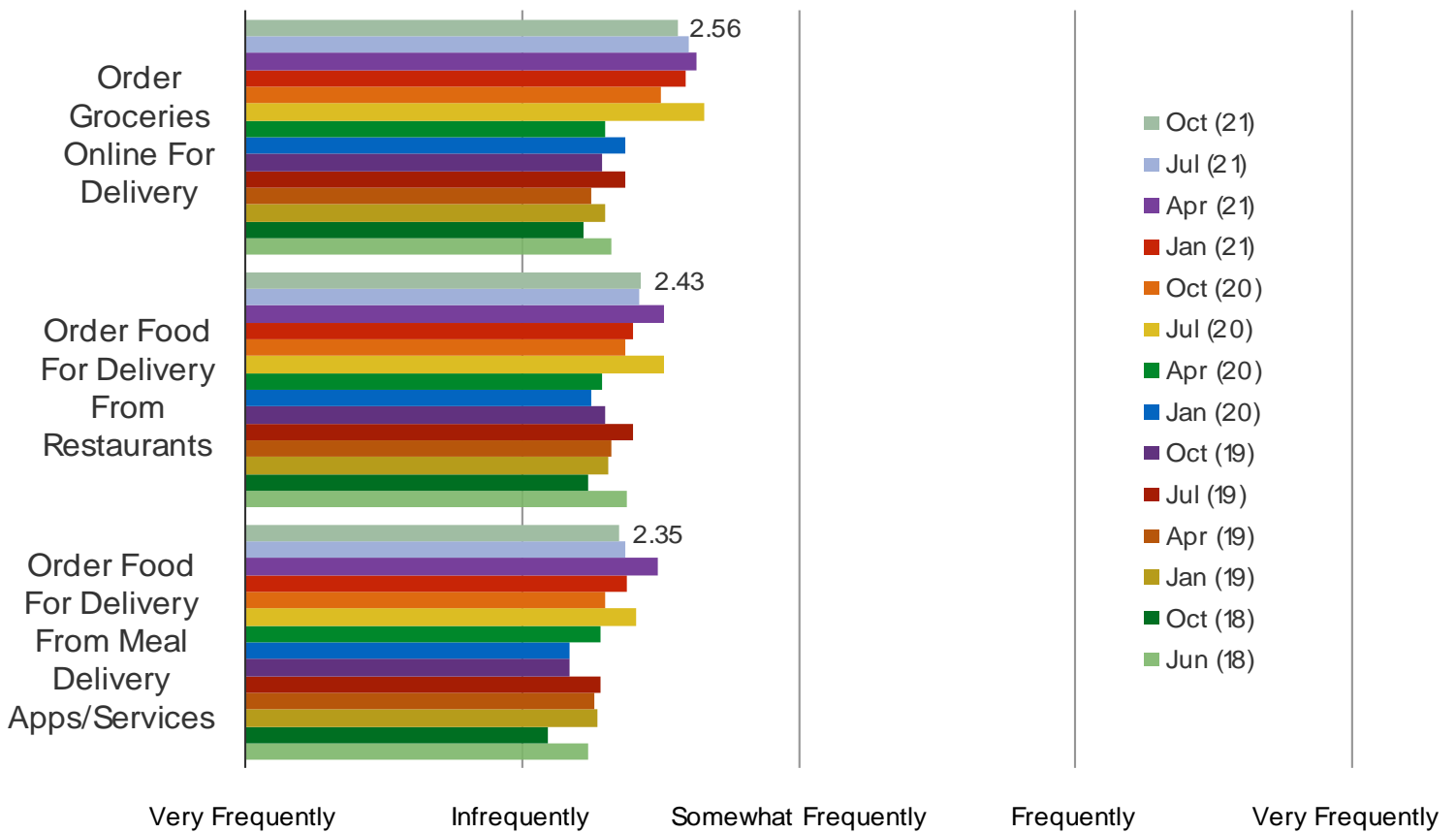
GROCERY TRENDS

Consumer preferences for shopping online vs. “in-stores” are unchanged sequentially. On balance, consumers prefer in-store shopping but online has gained over time.

FOOD DELIVERY USAGE

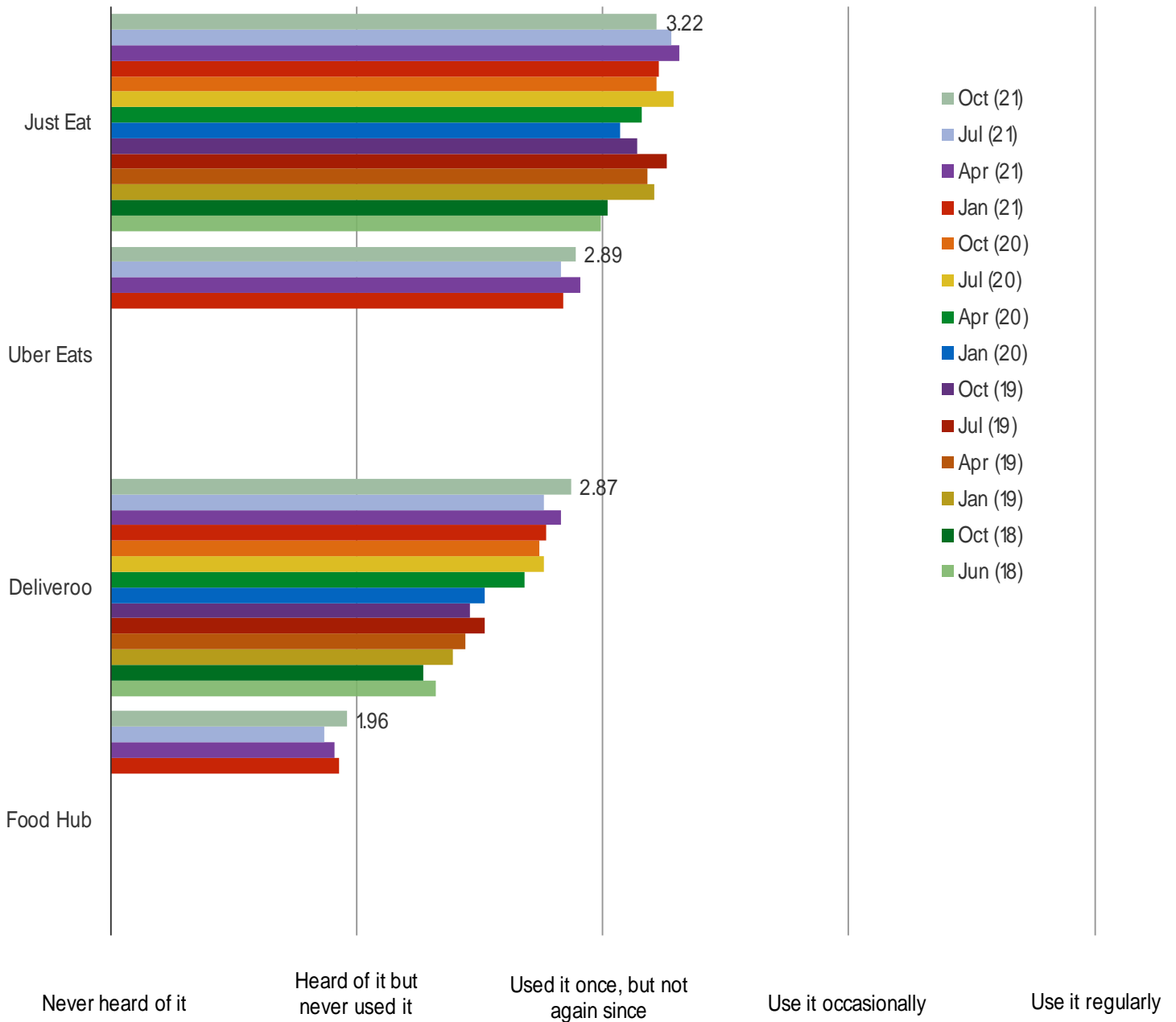
HOW OFTEN DO YOU...

Posed to all respondents.



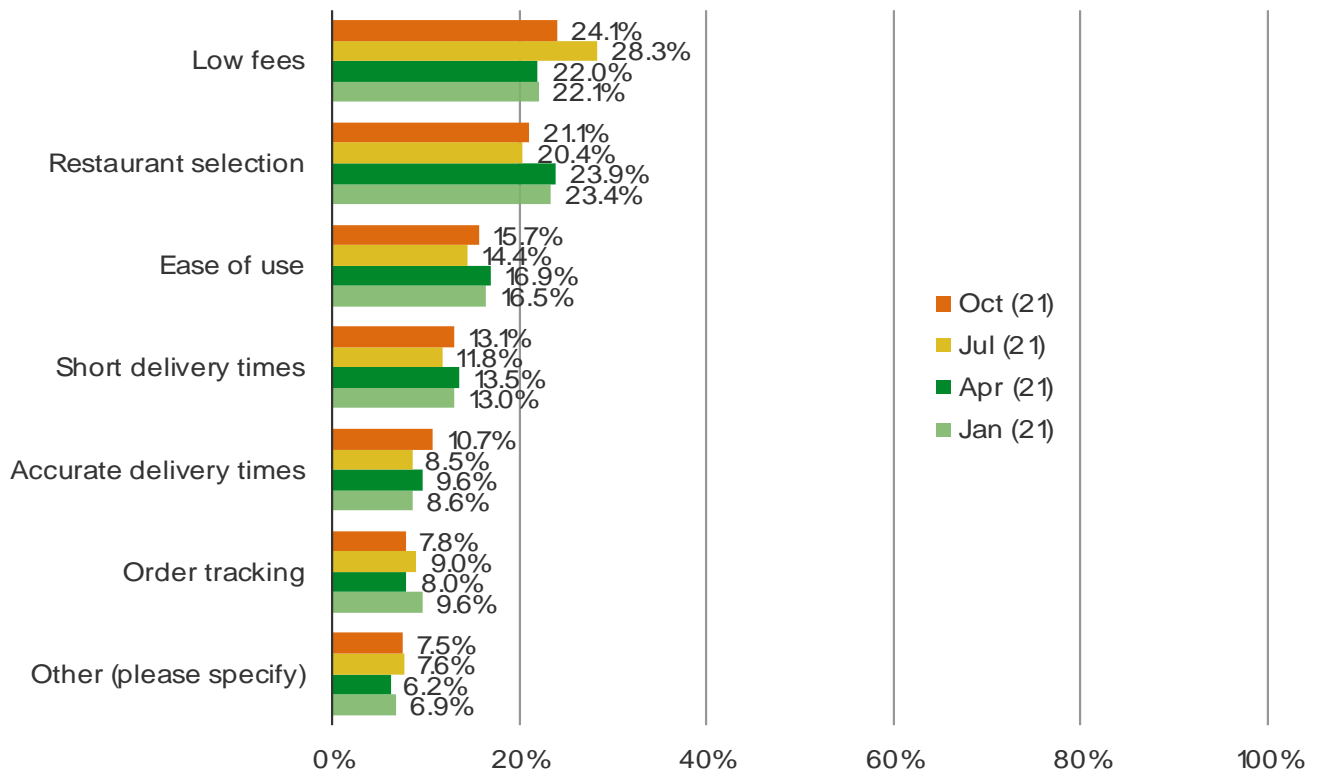
WHAT IS YOUR EXPERIENCE WITH THE FOLLOWING MEAL DELIVERY APPS/SERVICES?

Posed to all respondents.



WHAT IS THE MOST IMPORTANT FEATURE IN DECIDING WHICH FOOD DELIVERY/TAKEAWAY APP TO USE?

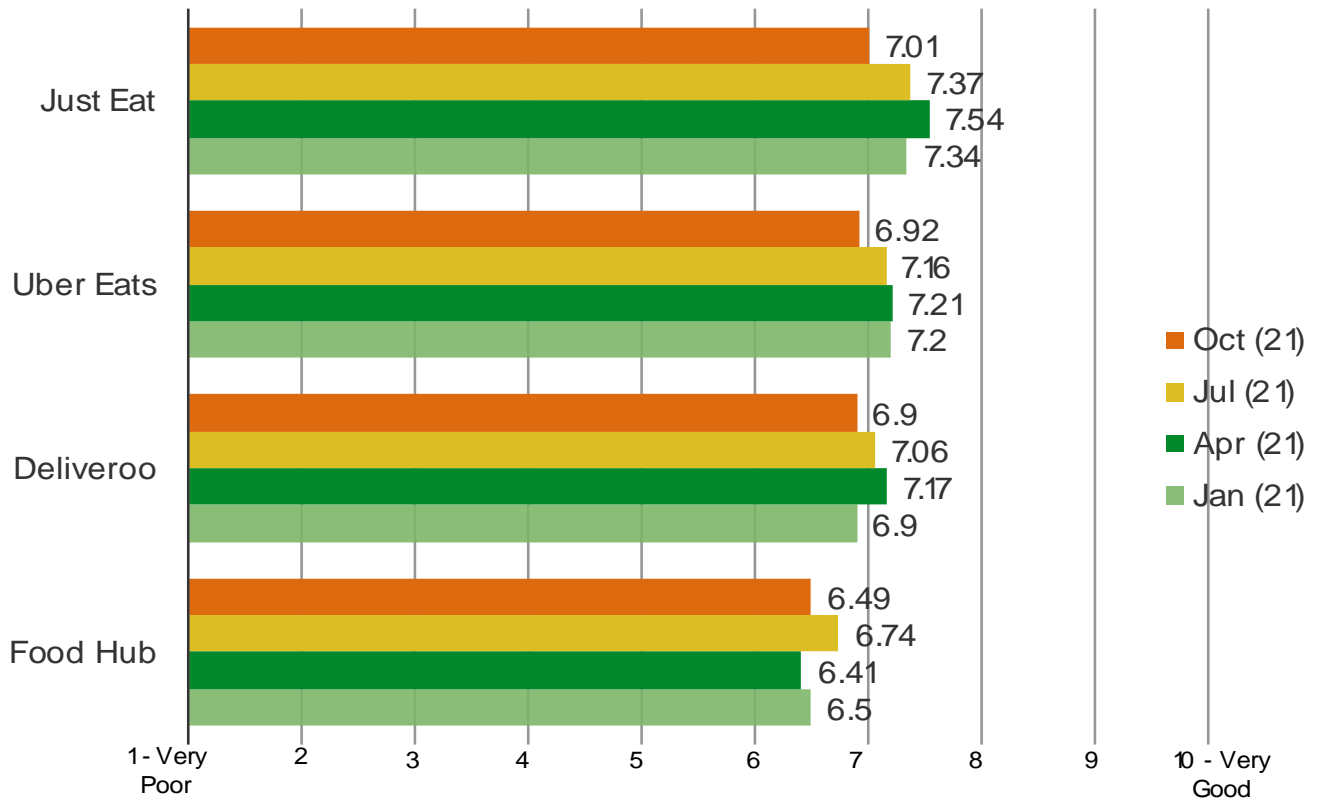
Posed to all respondents.



FOOD DELIVERY APP CUSTOMER SENTIMENT

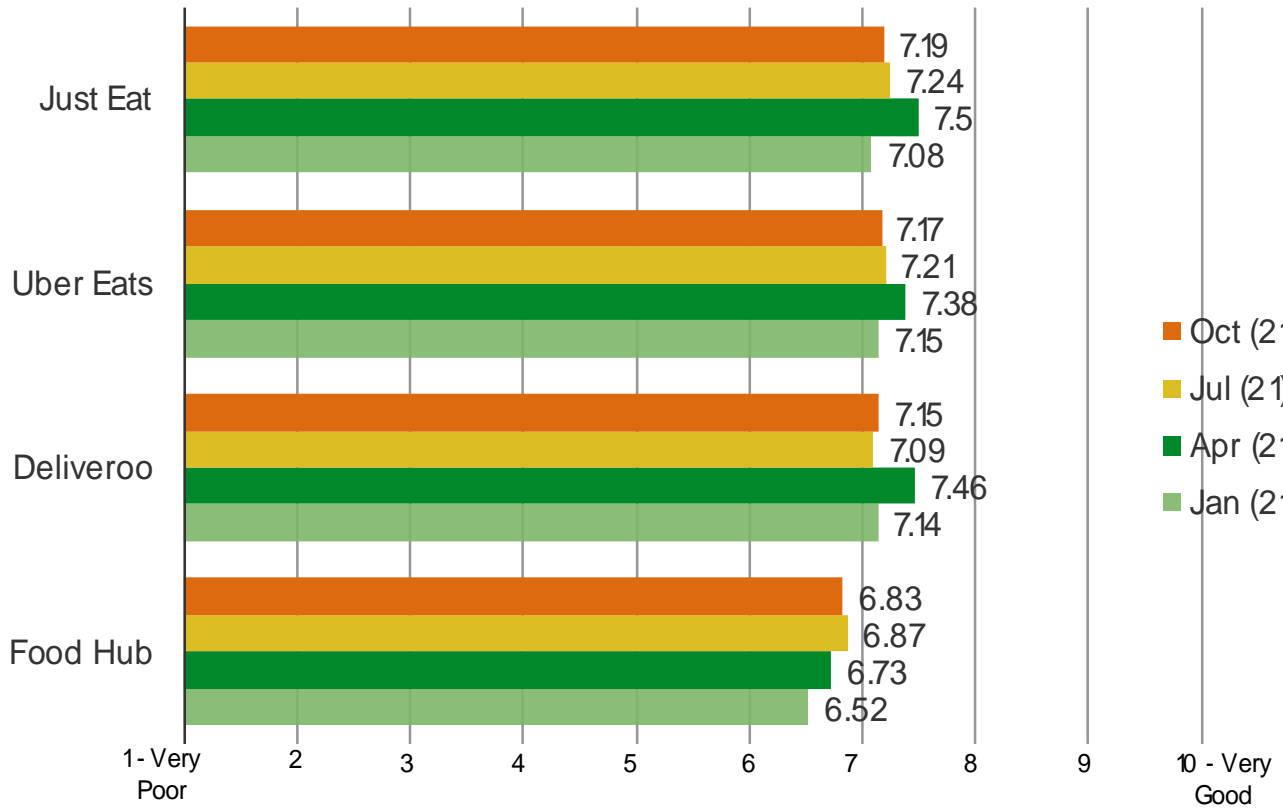
PLEASE RATE HOW GOOD THE FOLLOWING ARE WHEN IT COMES TO USER EXPERIENCE:

Posed to all respondents.



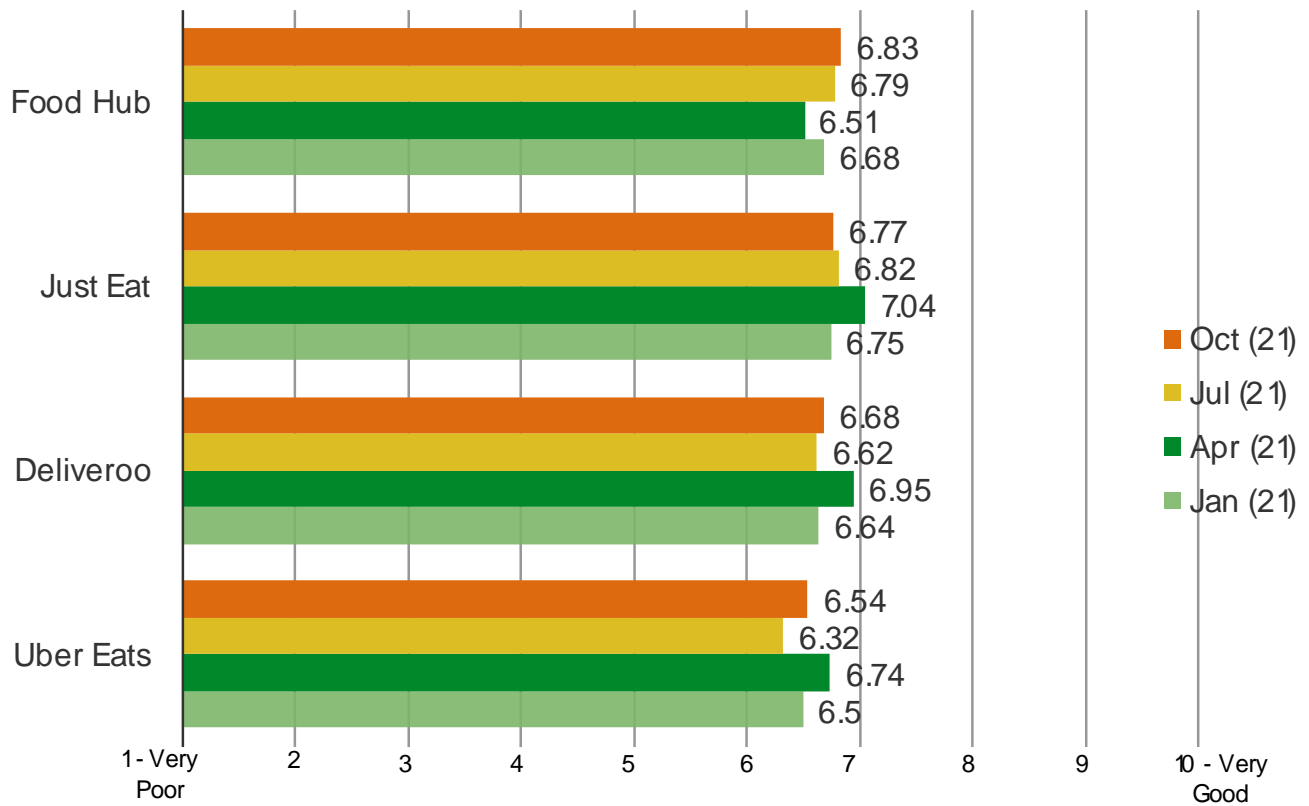
PLEASE RATE THE FOLLOWING WHEN IT COMES TO RESTAURANT SELECTION...

Posed to all respondents.



PLEASE RATE THE FOLLOWING WHEN IT COMES TO FEES...

Posed to all respondents.



WHAT PERCENTAGE OF YOUR FOOD DELIVERY/TAKEAWAY ORDERS DO YOU MAKE THROUGH THE FOLLOWING?

Posed to all respondents.

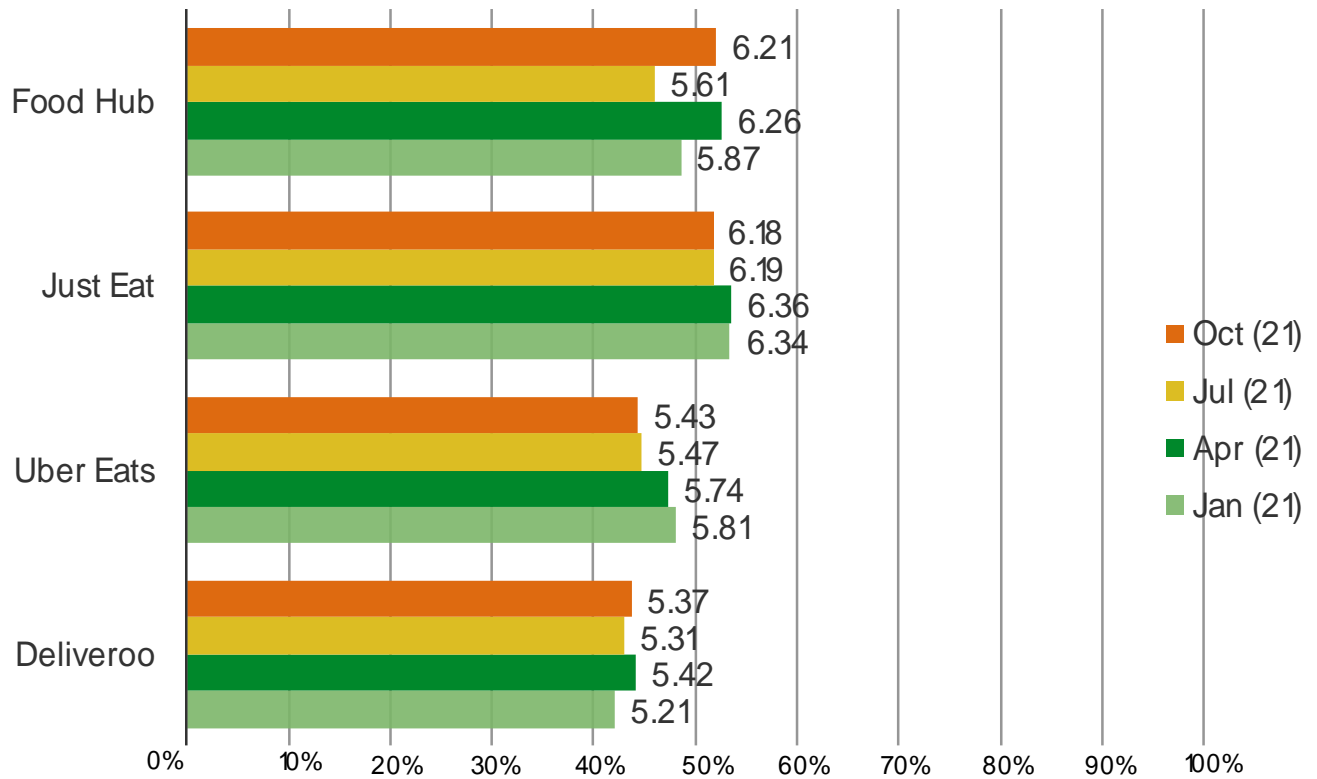


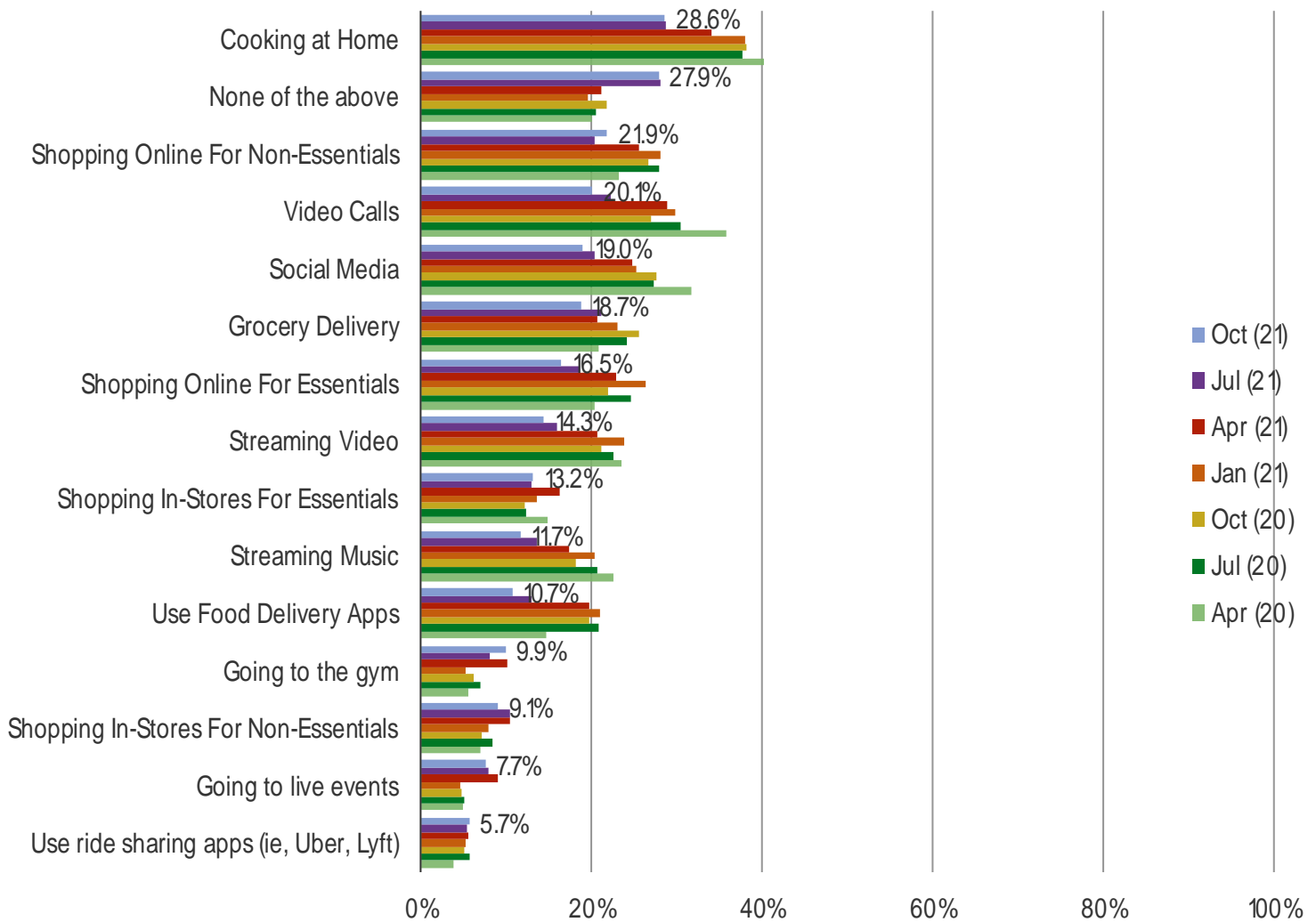
Chart above is a weighted average in which:

- 0% = 1
- 10% = 2
- 20% = 3
- 30% = 4
- 40% = 5
- 50% = 6
- 60% = 7
- 70% = 8
- 80% = 9
- 90% = 10
- 100% = 11

FOOD DELIVERY AND COVID IMPACTS

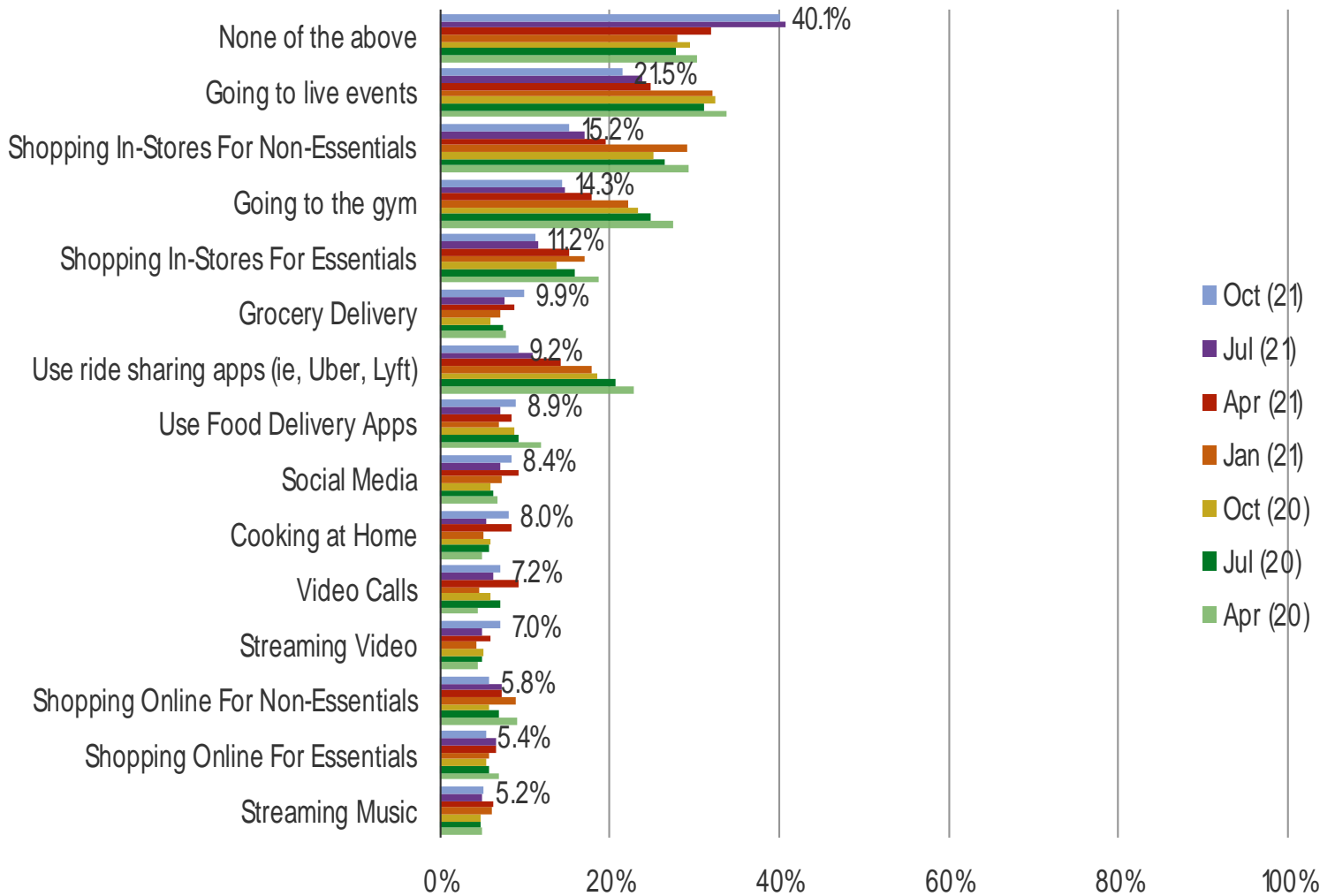
GOING FORWARD, WILL YOU DO ANY OF THE FOLLOWING MORE BECAUSE OF THE CORONAVIRUS AND SOCIAL DISTANCING? SELECT ALL THAT APPLY

Posed to all respondents.



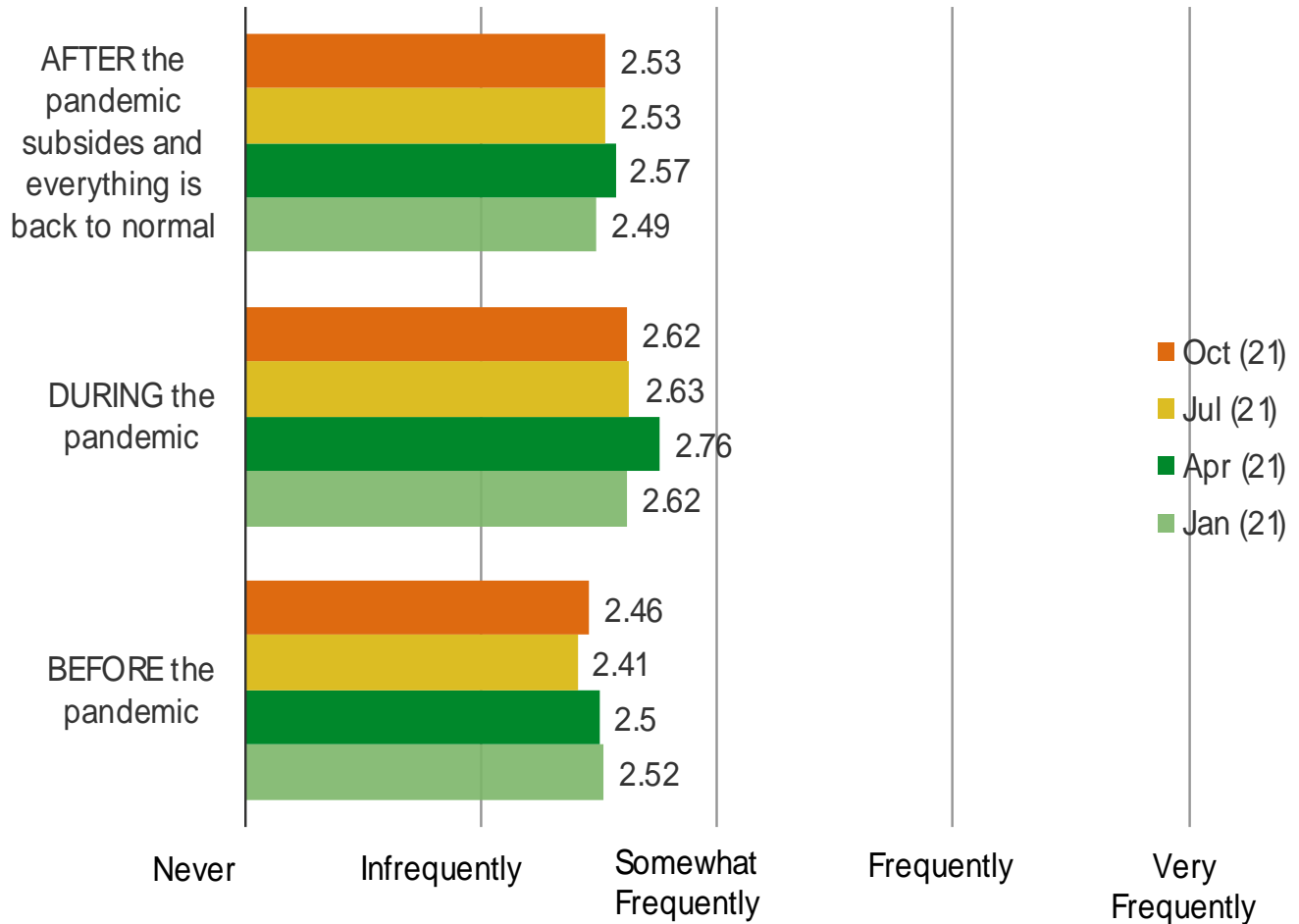
GOING FORWARD, WILL YOU DO ANY OF THE FOLLOWING LESS BECAUSE OF THE CORONAVIRUS AND SOCIAL DISTANCING? SELECT ALL THAT APPLY

Posed to all respondents.



PLEASE ESTIMATE YOUR USAGE OF FOOD DELIVERY/TAKEAWAY APPS DURING THE FOLLOWING PERIODS:

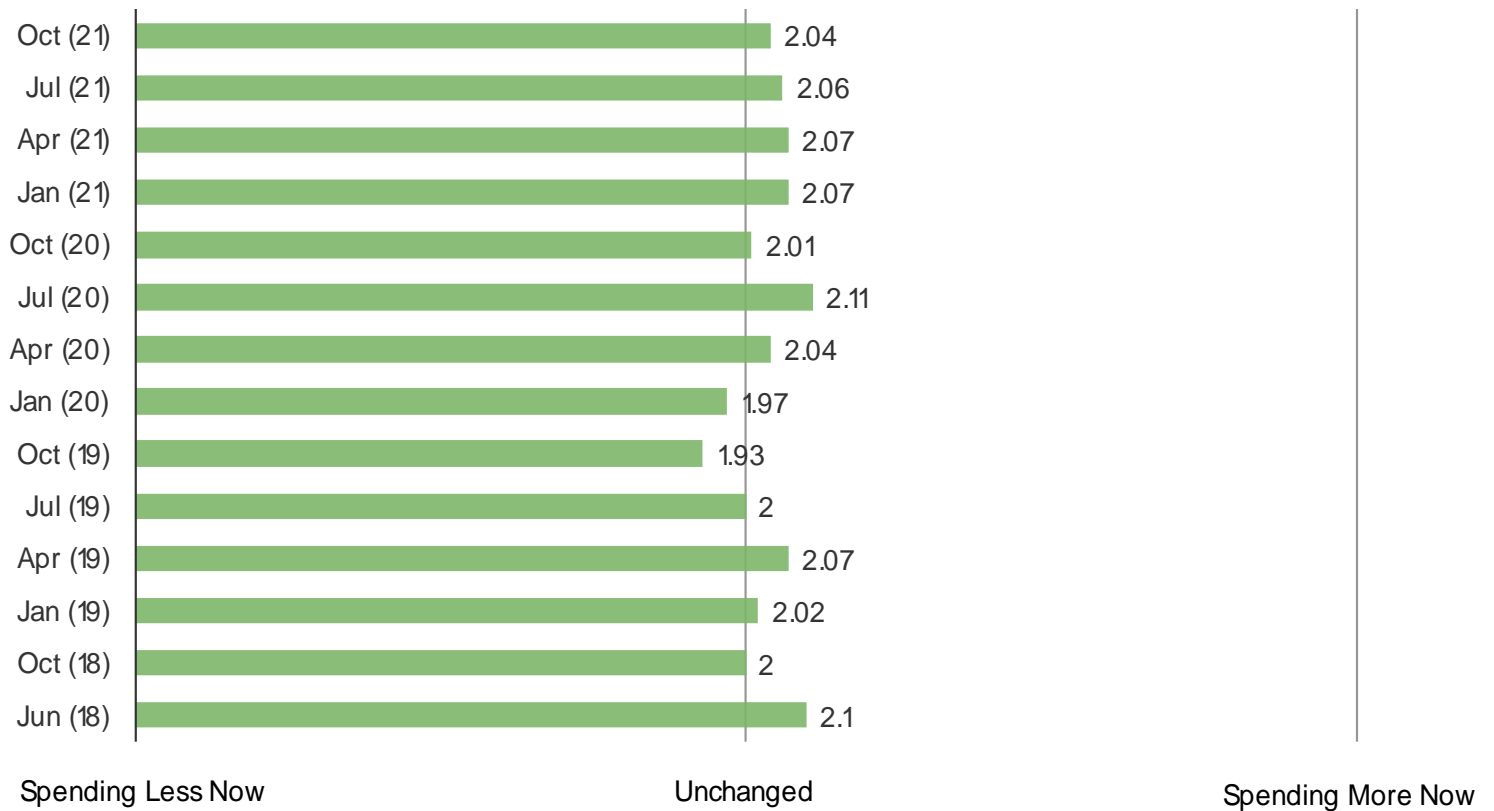
Posed to all respondents.



GROCERY STORES SHOPPING TRENDS

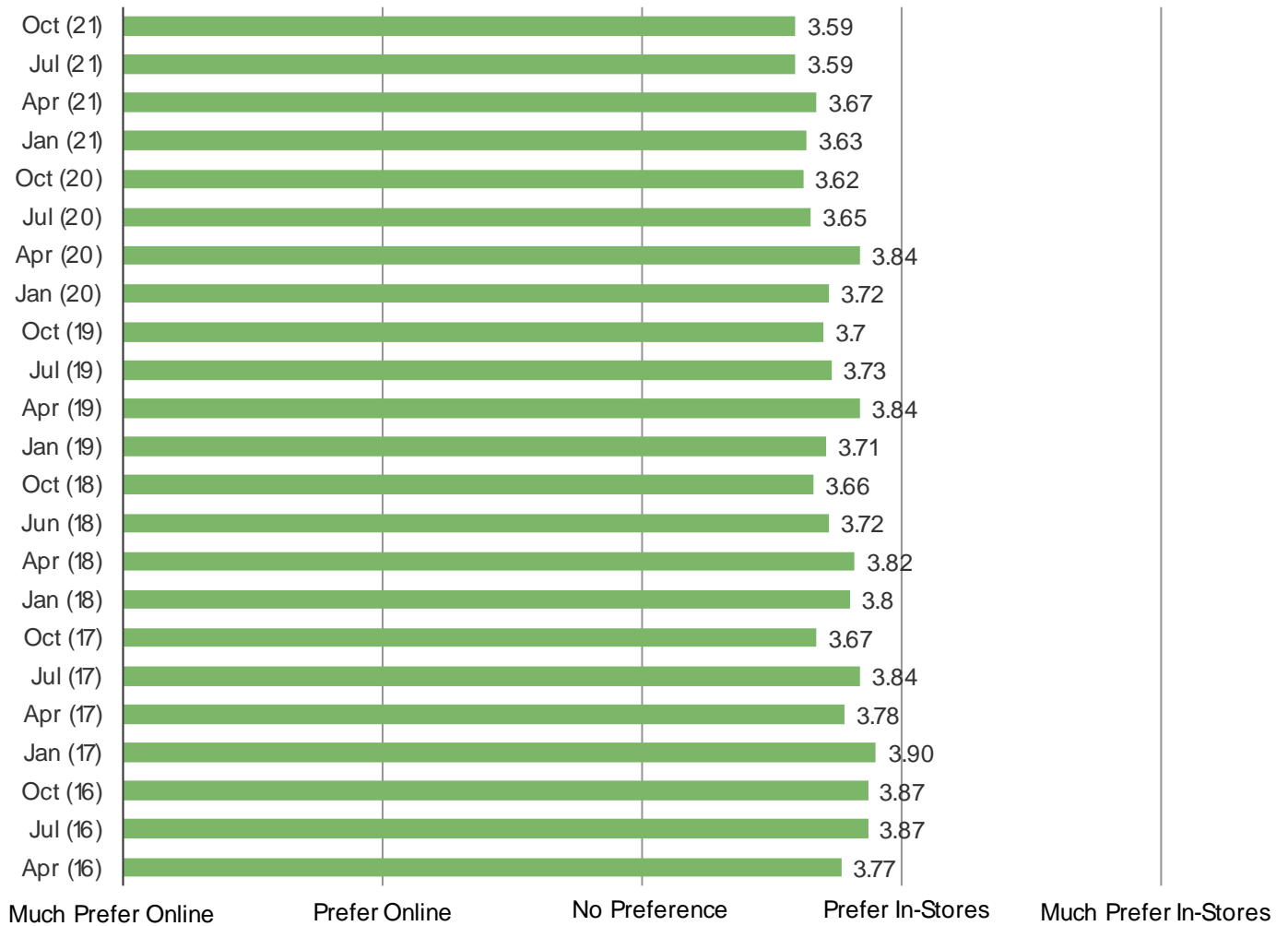
IN GENERAL, WOULD YOU SAY YOUR GROCERY SPENDING HAS CHANGED OVER THE PAST YEAR?

Posed to all respondents.



DO YOU PREFER TO SHOP FOR GROCERIES ONLINE OR IN-STORES?

Posed to all respondents.



DO YOU THINK YOU CURRENTLY SPEND THE RIGHT AMOUNT ON GROCERIES?

Posed to all respondents.

