



CHECK BREAKDOWN:

Audience: 800+ Consumers

TREND CHECKS

FOOD DELIVERY USAGE INCREASES Q/Q

Food delivery engagement has been nudging higher sequentially over a prolonged period.

MARKET SHARE | COMPETITIVE DYNAMICS

Just Eat is still the top food delivery app in our trackers. Uber Eats and Deliveroo are virtually tied for second place.

SENTIMENT | JUST EAT AND DELIVEROO LEAD

Just Eat and Deliveroo lead key competitors when it comes to the user experience and restaurant selection.

RESPONDENTS EXPECT USAGE TO DECLINE

Respondents expect usage of apps to decline as Covid subsides but remain higher than pre-pandemic levels.

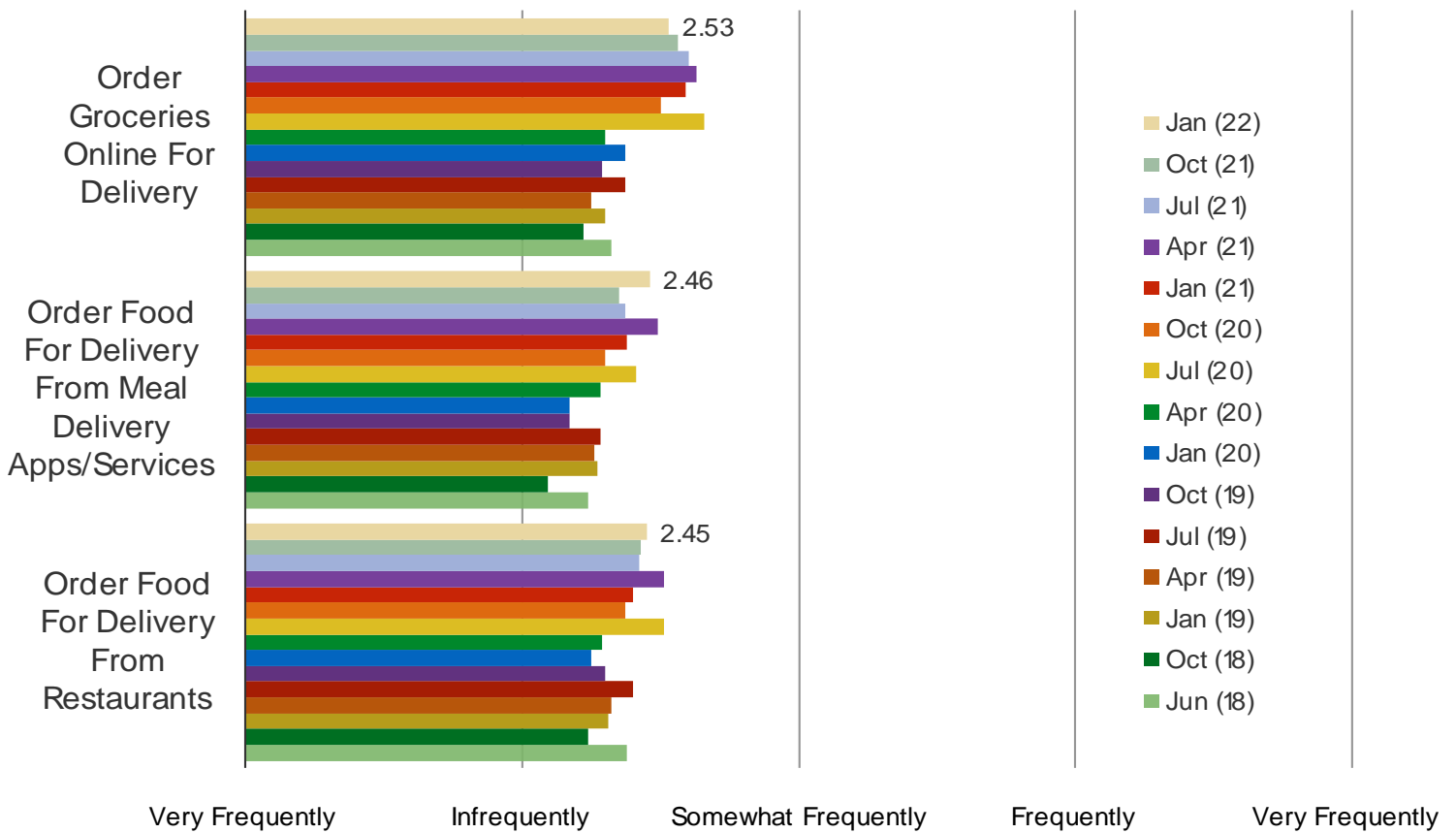
GROCERY TRENDS

Consumers have been gradually shifting grocery shopping preferences to online, but online grocery engagement has pulled back from Covid highs. Consumers also note spending more on groceries recently and were increasingly likely to say they want to cut back on grocery spending.

FOOD DELIVERY USAGE

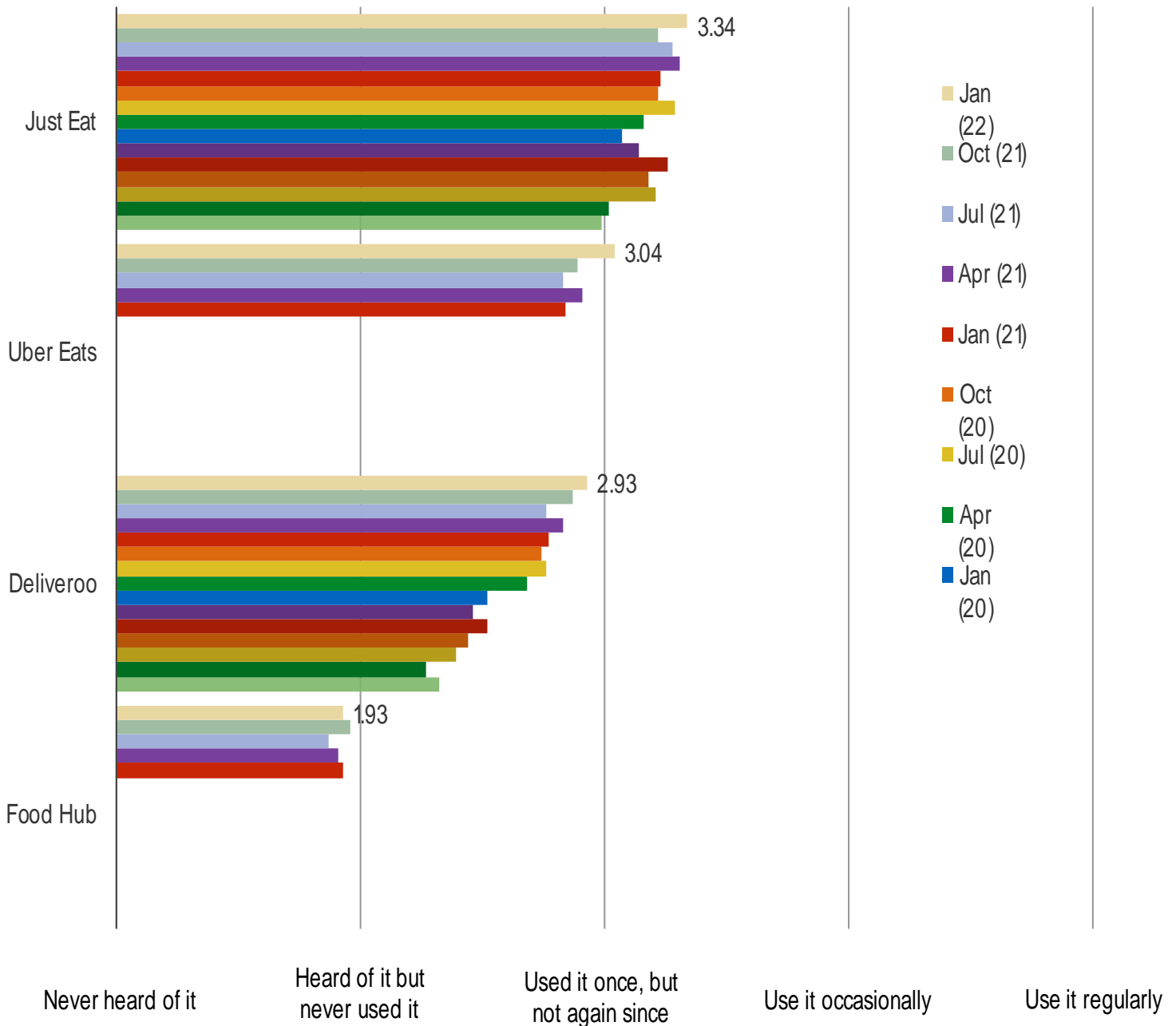
HOW OFTEN DO YOU...

Posed to all respondents.



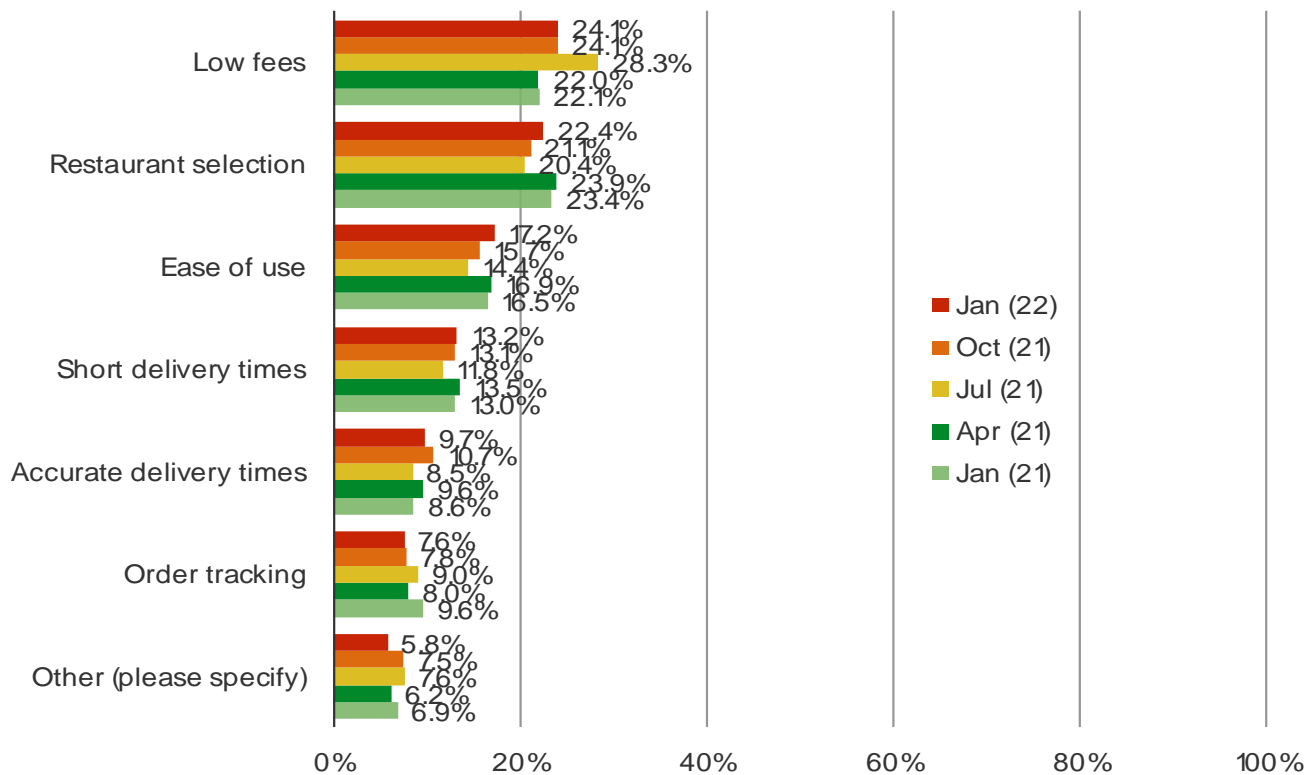
WHAT IS YOUR EXPERIENCE WITH THE FOLLOWING MEAL DELIVERY APPS/SERVICES?

Posed to all respondents.



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

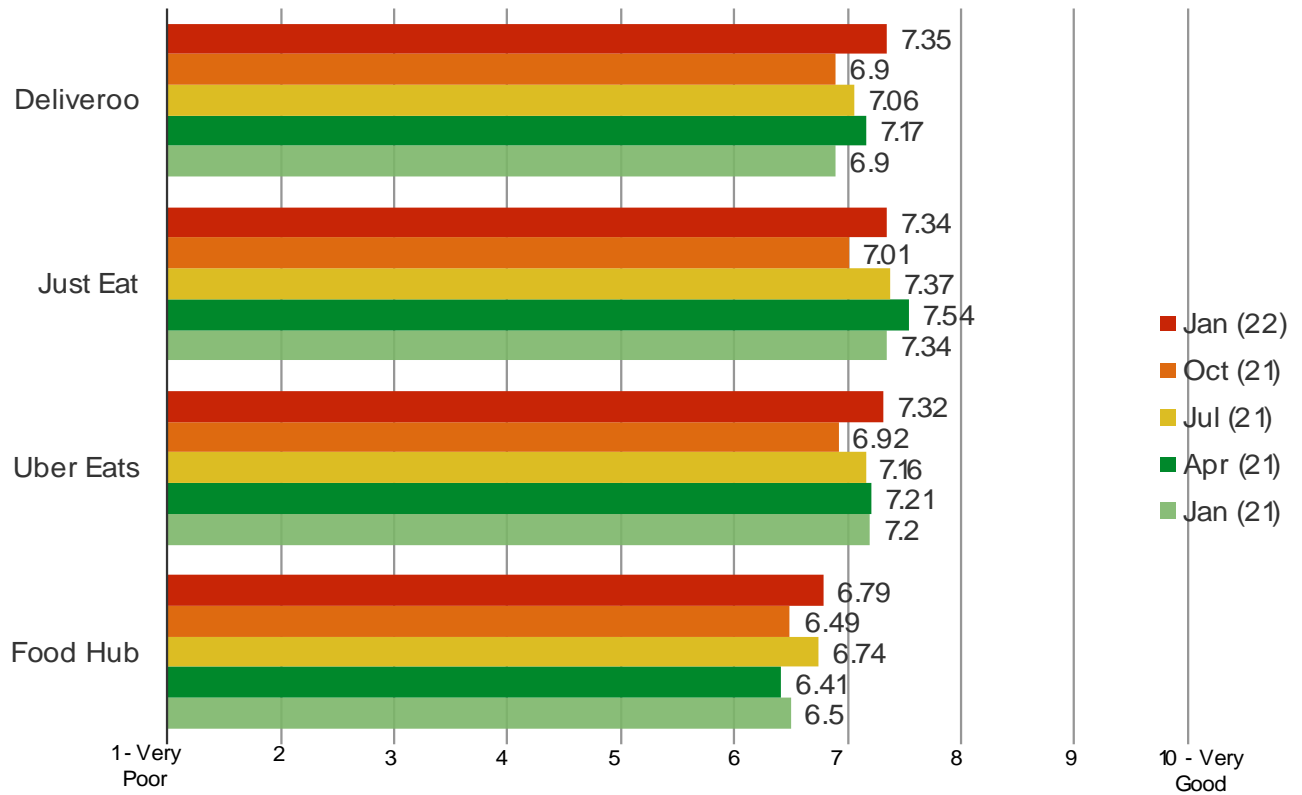
Posed to all respondents.



FOOD DELIVERY APP CUSTOMER SENTIMENT

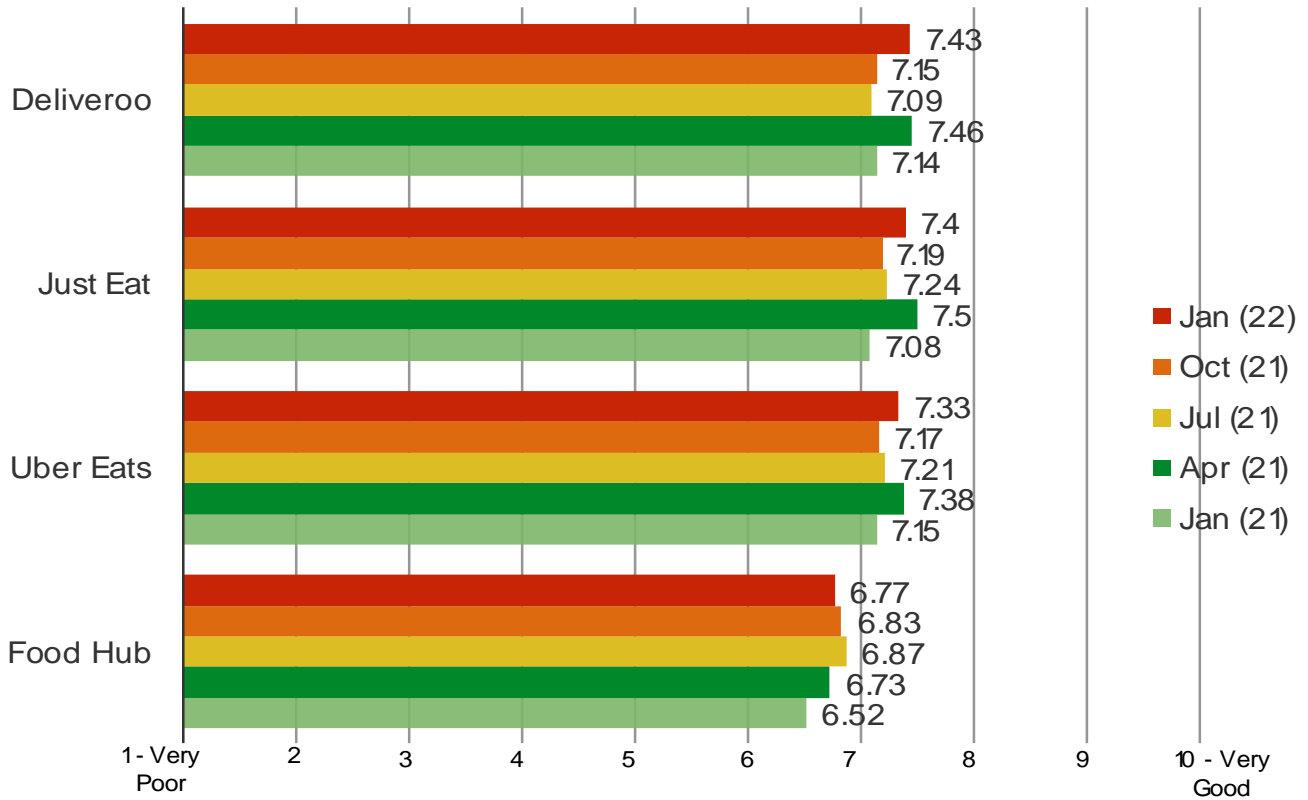
PLEASE RATE HOW GOOD THE FOLLOWING ARE WHEN IT COMES TO USER EXPERIENCE:

Posed to all respondents.



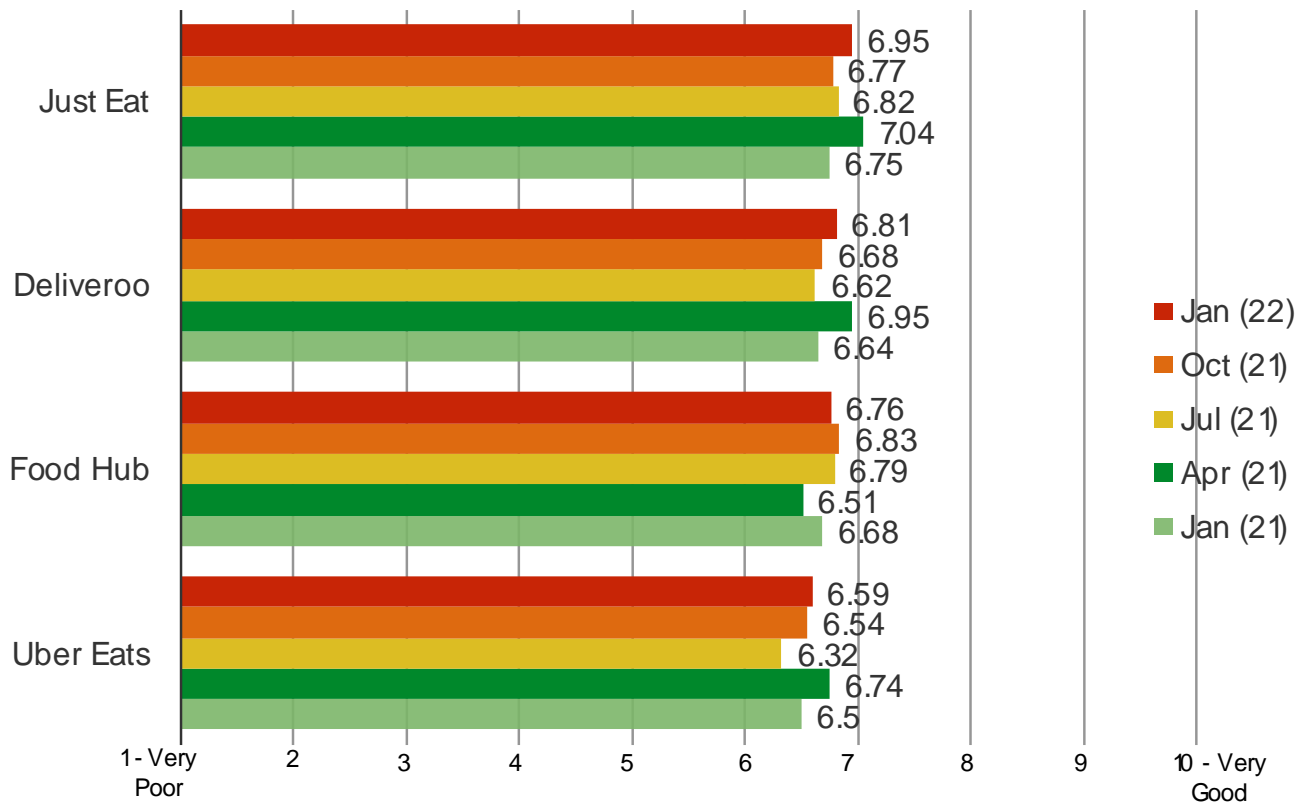
PLEASE RATE THE FOLLOWING WHEN IT COMES TO RESTAURANT SELECTION...

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.

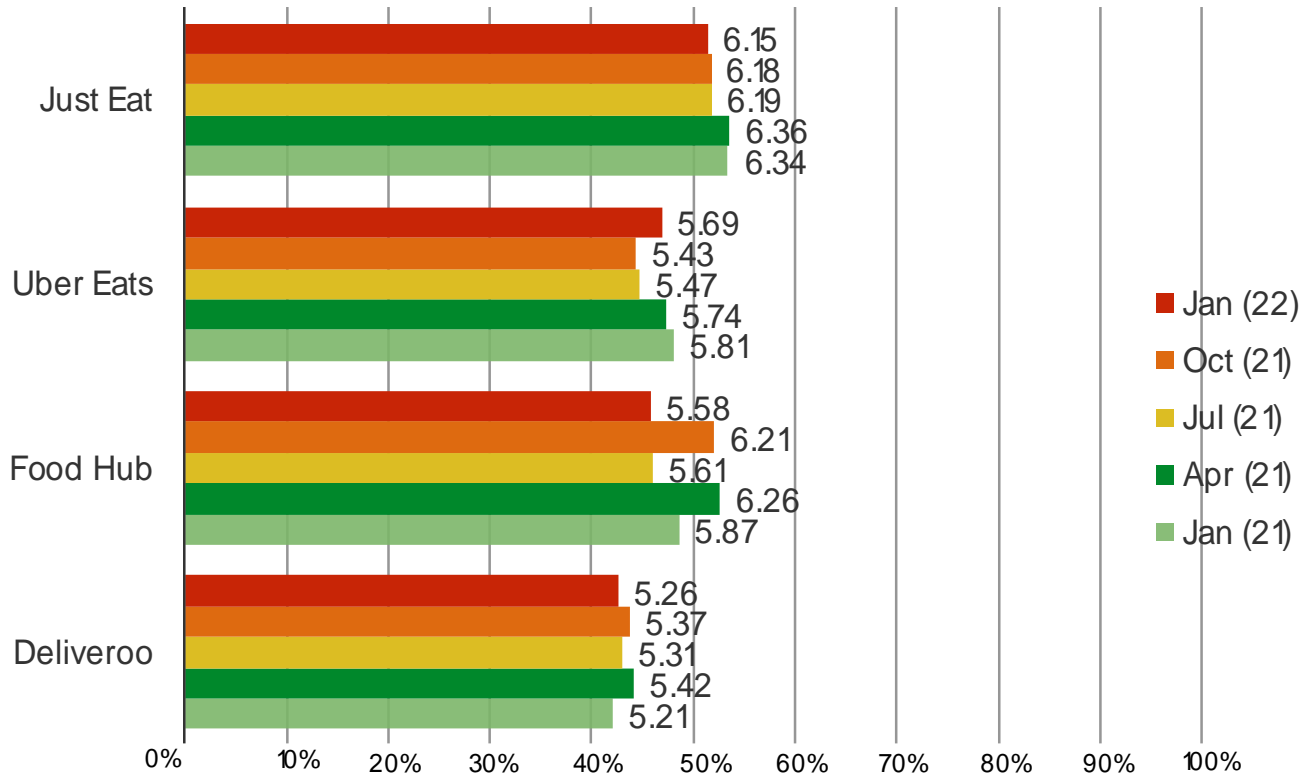


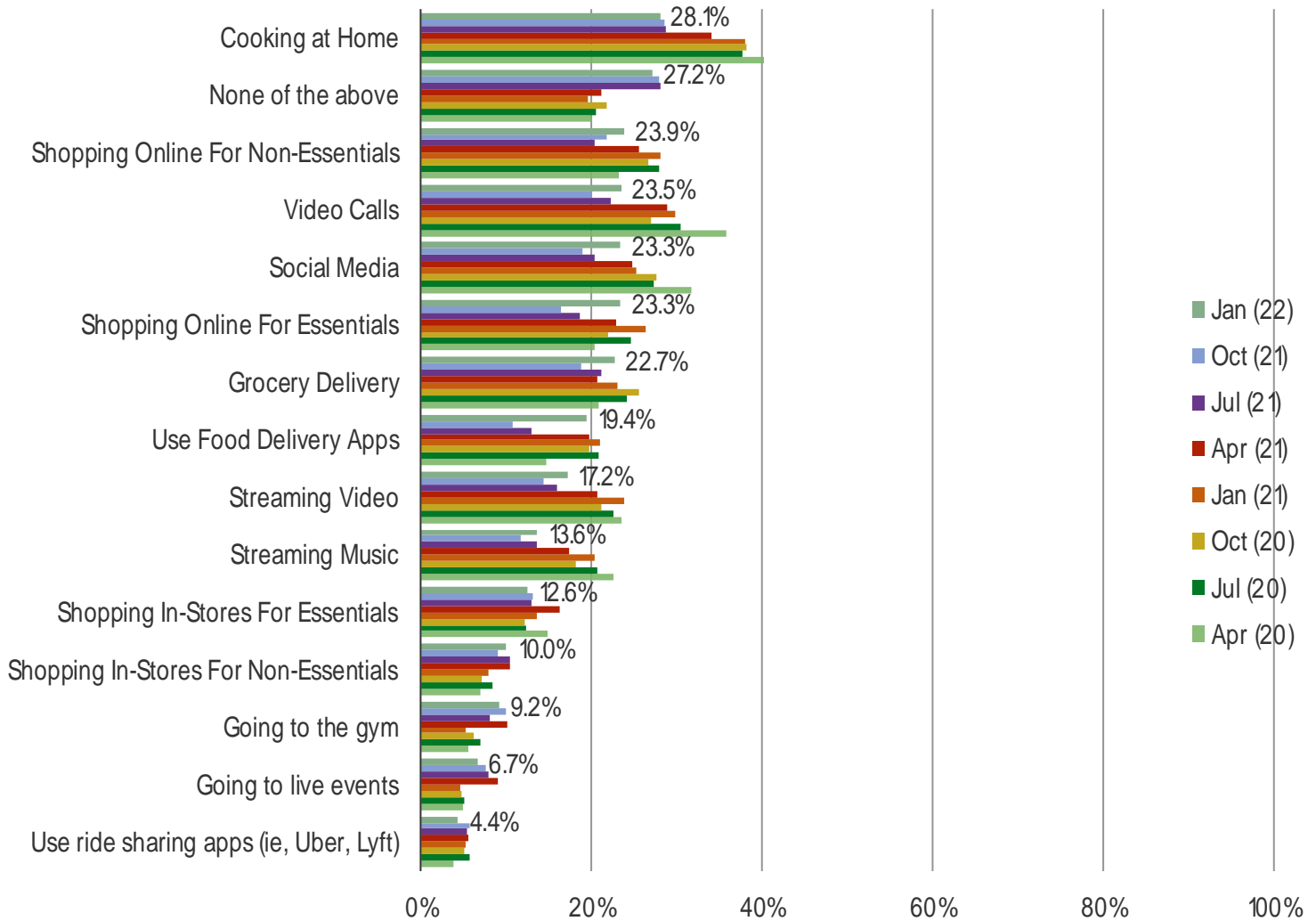
Chart above is a weighted average in which:

- 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

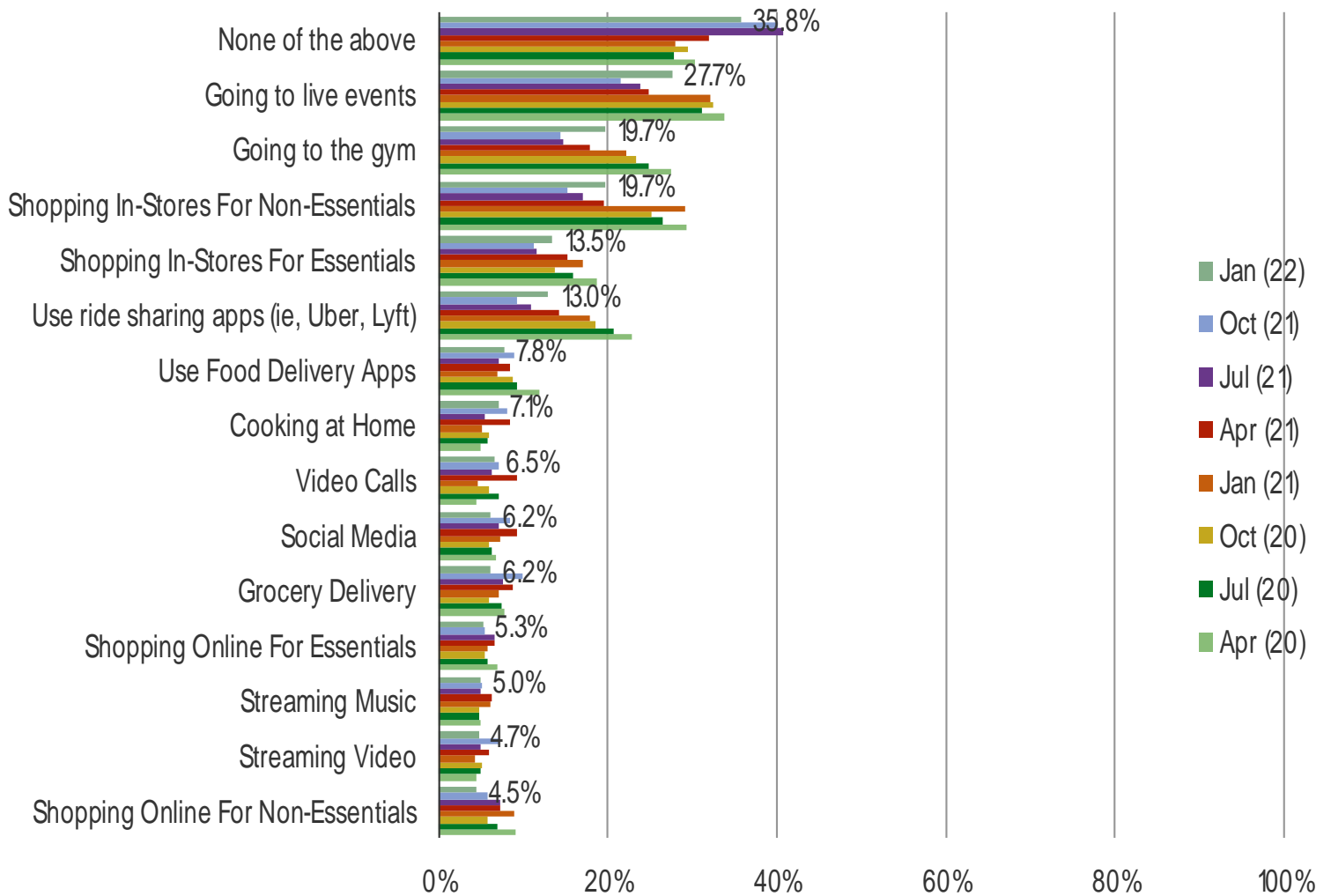
GOING FORWARD, WILL YOU DO ANY OF THE FOLLOWING MORE BECAUSE OF THE CORONAVIRUS AND SOCIAL DISTANCING? SELECT ALL THAT APPLY

Posed to all respondents.



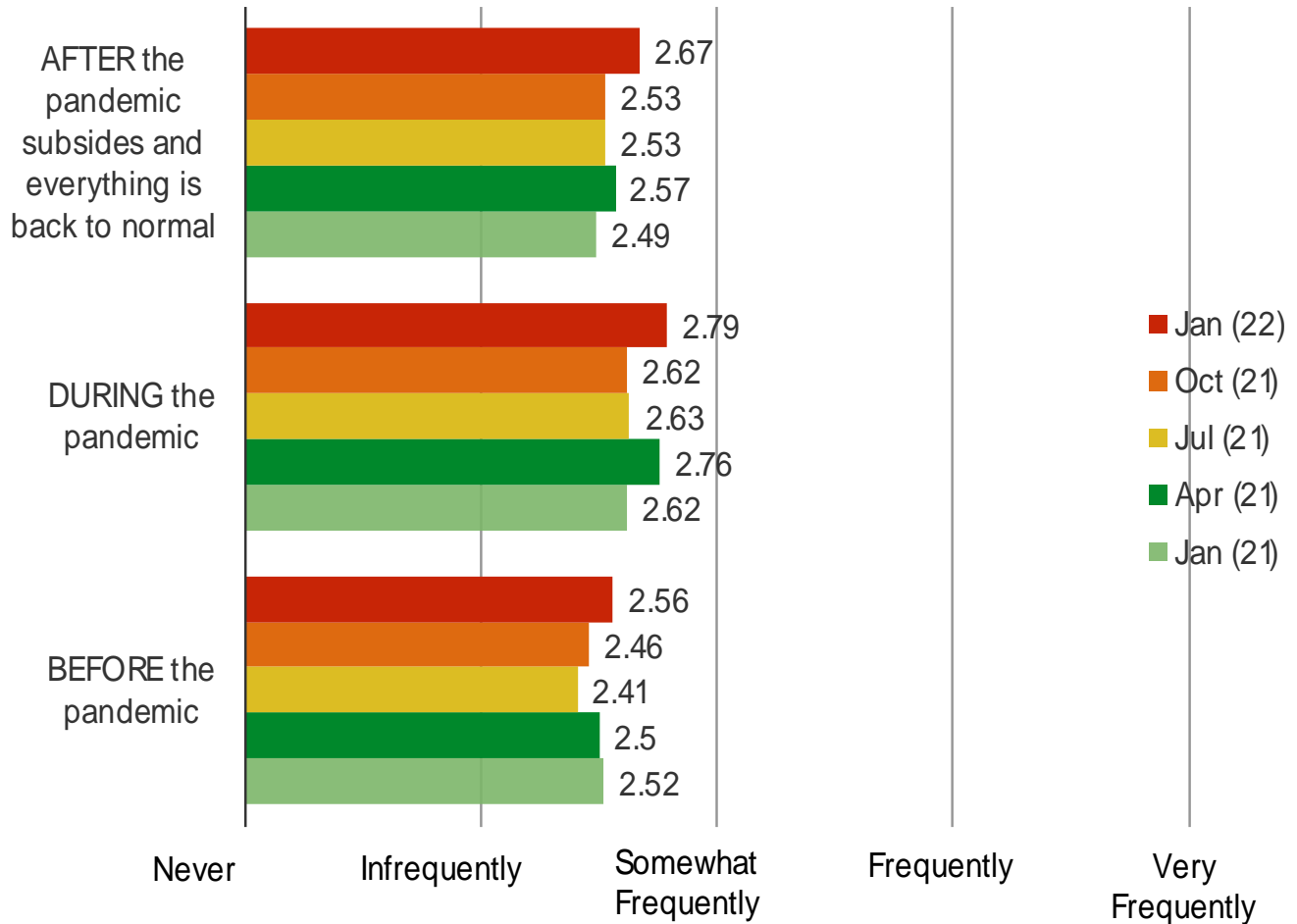
GOING FORWARD, WILL YOU DO ANY OF THE FOLLOWING LESS BECAUSE OF THE CORONAVIRUS AND SOCIAL DISTANCING? SELECT ALL THAT APPLY

Posed to all respondents.



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

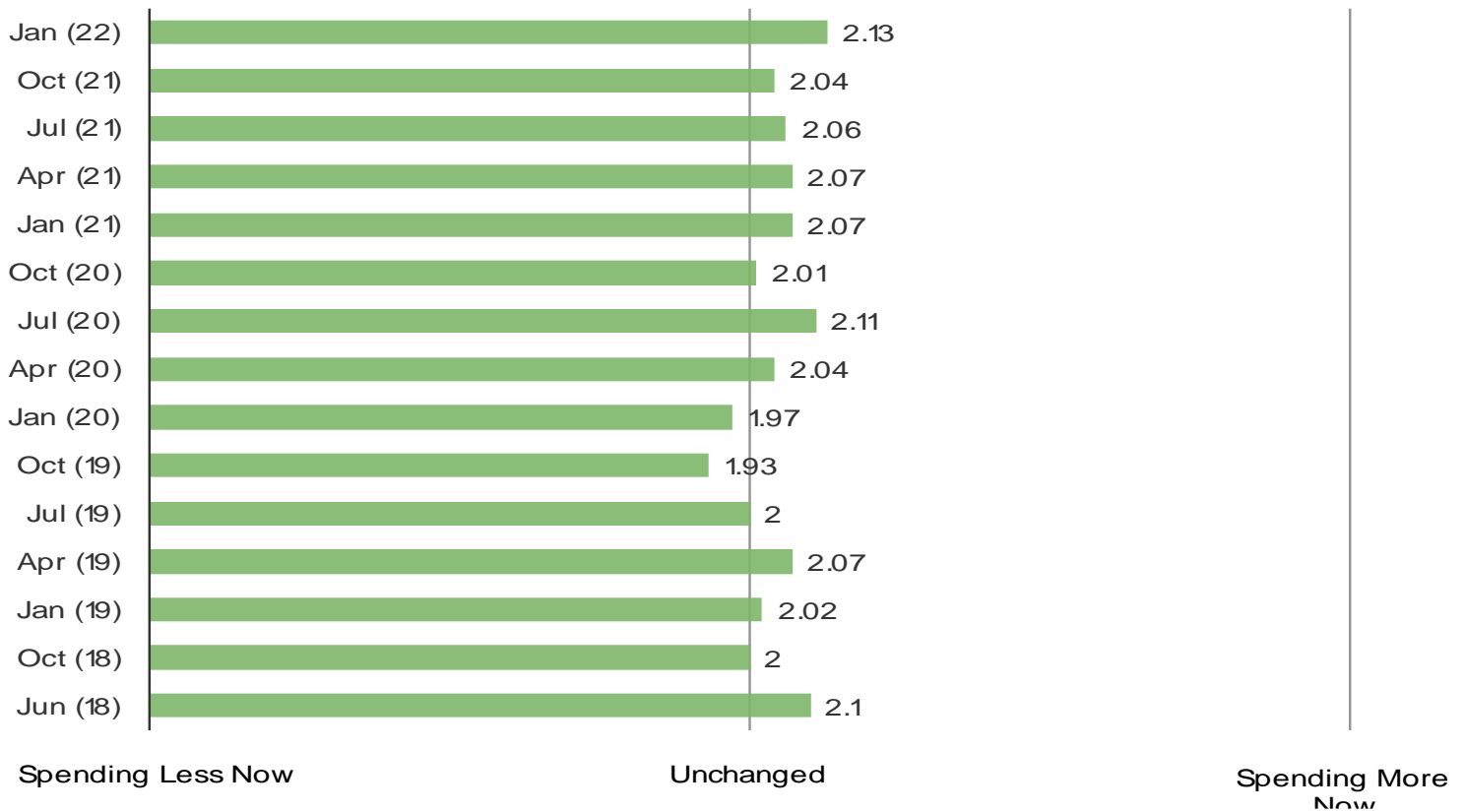
Posed to all respondents.



GROCERY STORES SHOPPING TRENDS

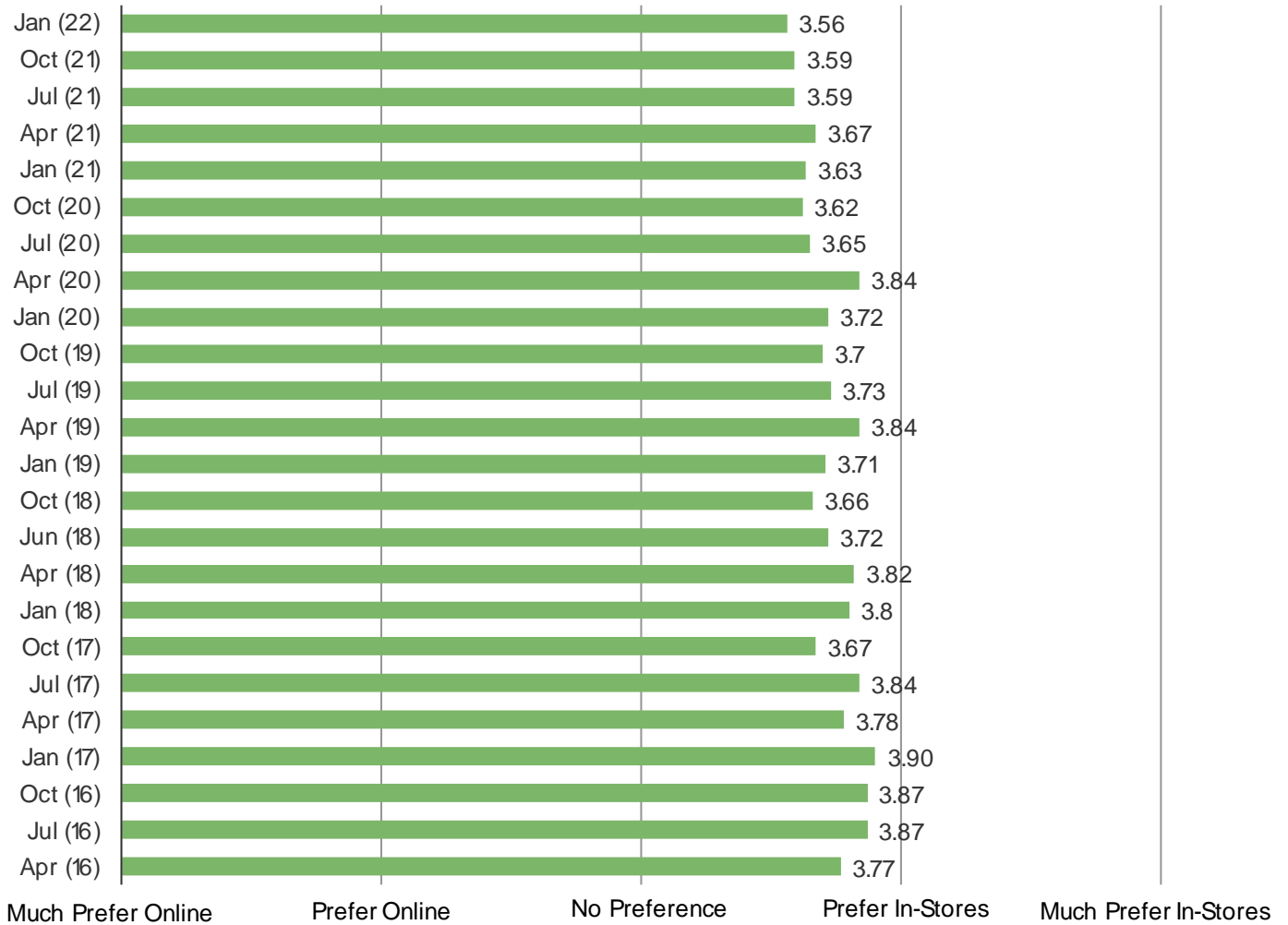
IN GENERAL, WOULD YOU SAY YOUR GROCERY SPENDING HAS CHANGED OVER THE PAST YEAR?

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.

