

Bespoke Survey Research

October 2023

UK Food Delivery

Volume 22 | Quarterly Survey

800+ UK Consumers

Tickers Covered: UBER, Just Eat, Deliveroo.

KPIs and Key questions

1. Consumer usage of food delivery and grocery delivery apps has settled into a frequency range that is slightly lower than what our survey observed during Covid, but higher than what we observed during pre-Covid times.
2. Just Eat is the share leader among consumers in our UK survey in terms of self-reported usage. Growth in our engagement metrics has been flatter of late.
3. Self-reported usage of Deliveroo has grown significantly since the start of our survey and has closed the gap between itself and Just Eat over the history of our survey.
4. Consumers have been increasingly saying that the most important feature in determining which food delivery app to use is "low fees."
5. Uber Eats and Just Eat continue to lead competitors when it comes to user experience and restaurant selection.
6. Consumers in the UK continue to be more likely to tell us they are looking to cut back on grocery spending vs. spend more.

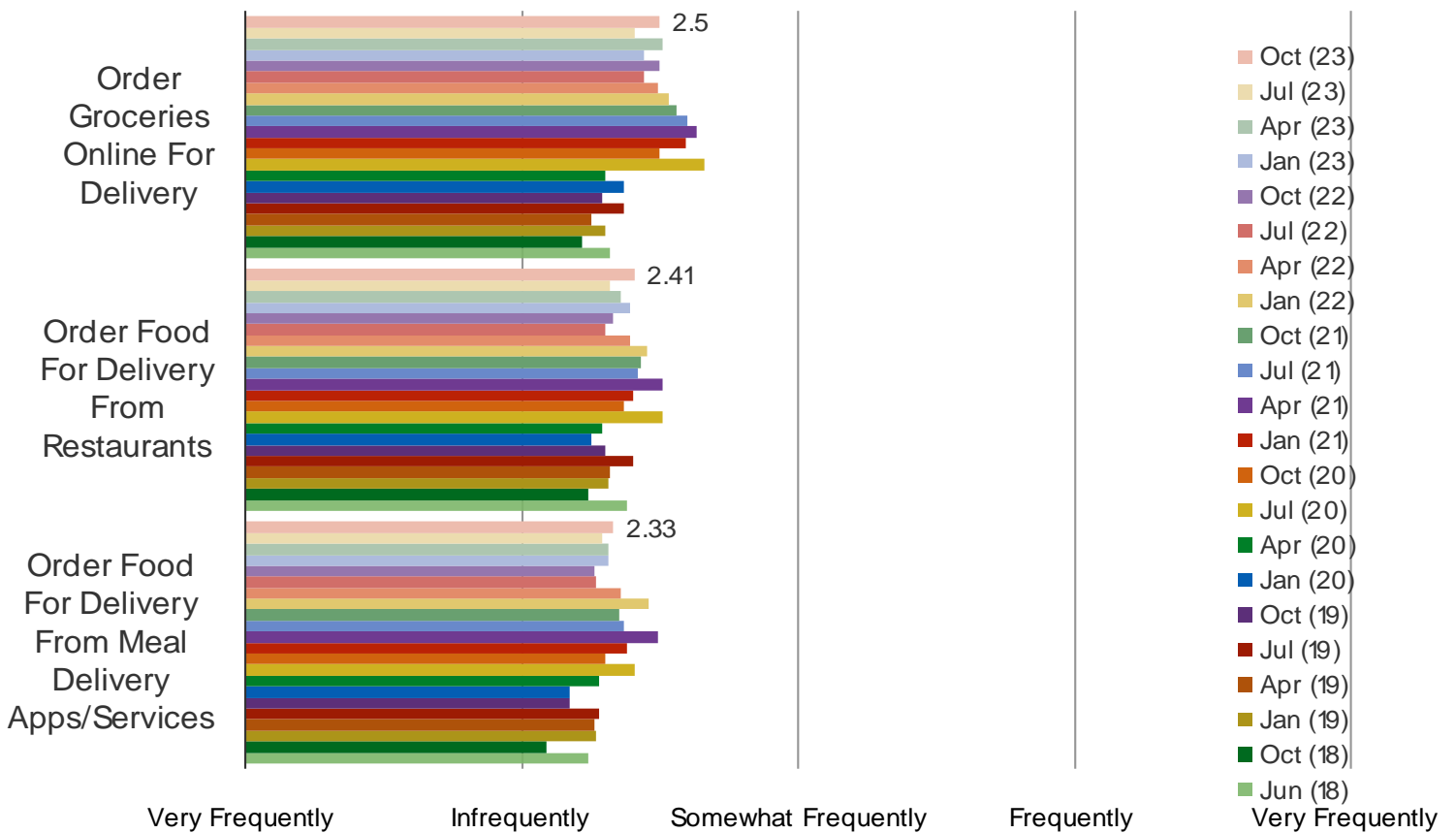
Noteworthy Stats:

- 28.4%** Of respondents said that low fees are the most important factor when deciding which food delivery app to use.
- 21.8%** Of respondents note that restaurant selection is the most important factor when deciding which food delivery app to use.
- 41.5%** Of respondents would like to cut back on grocery spending.

FOOD DELIVERY USAGE

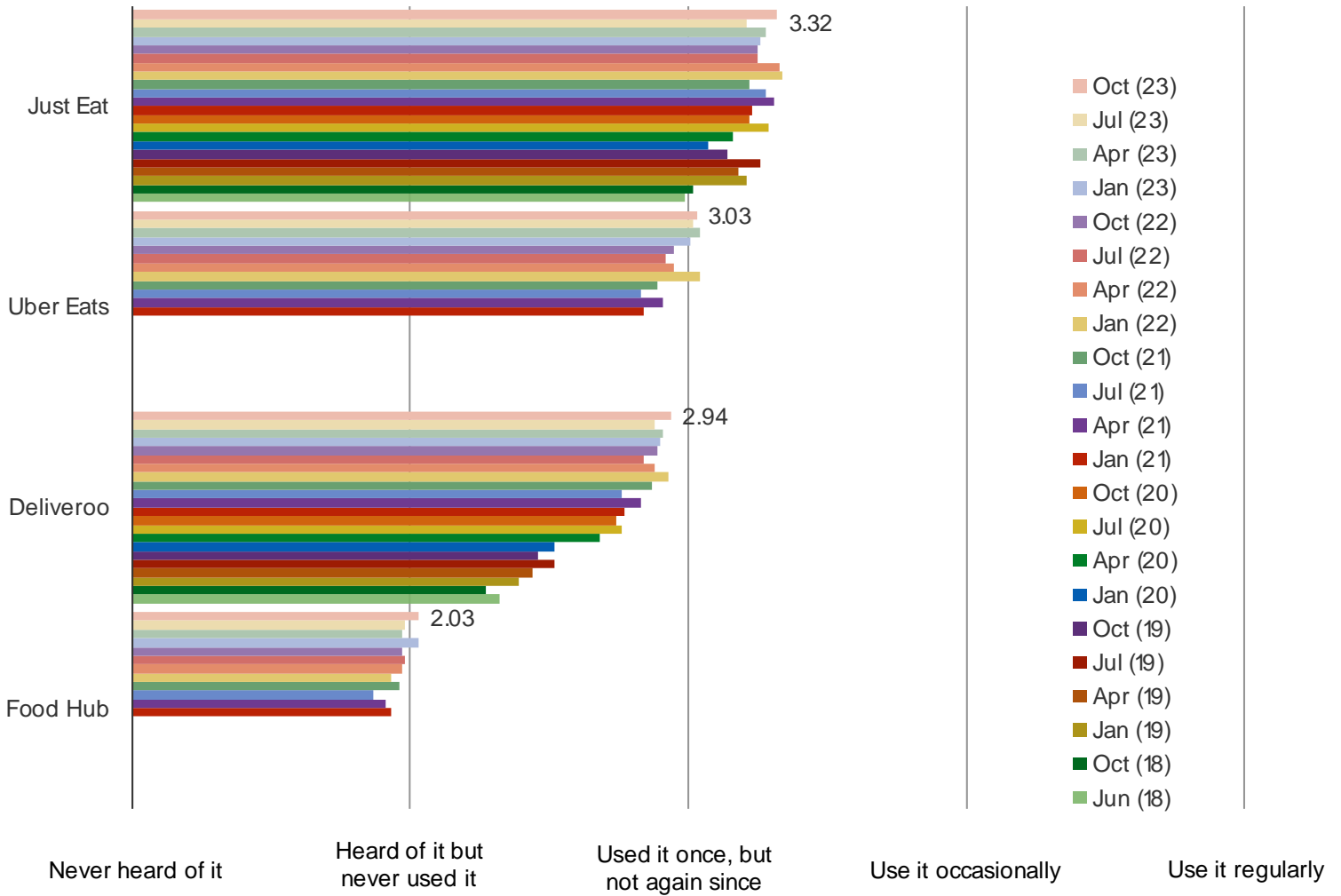
HOW OFTEN DO YOU...

Posed to all respondents.



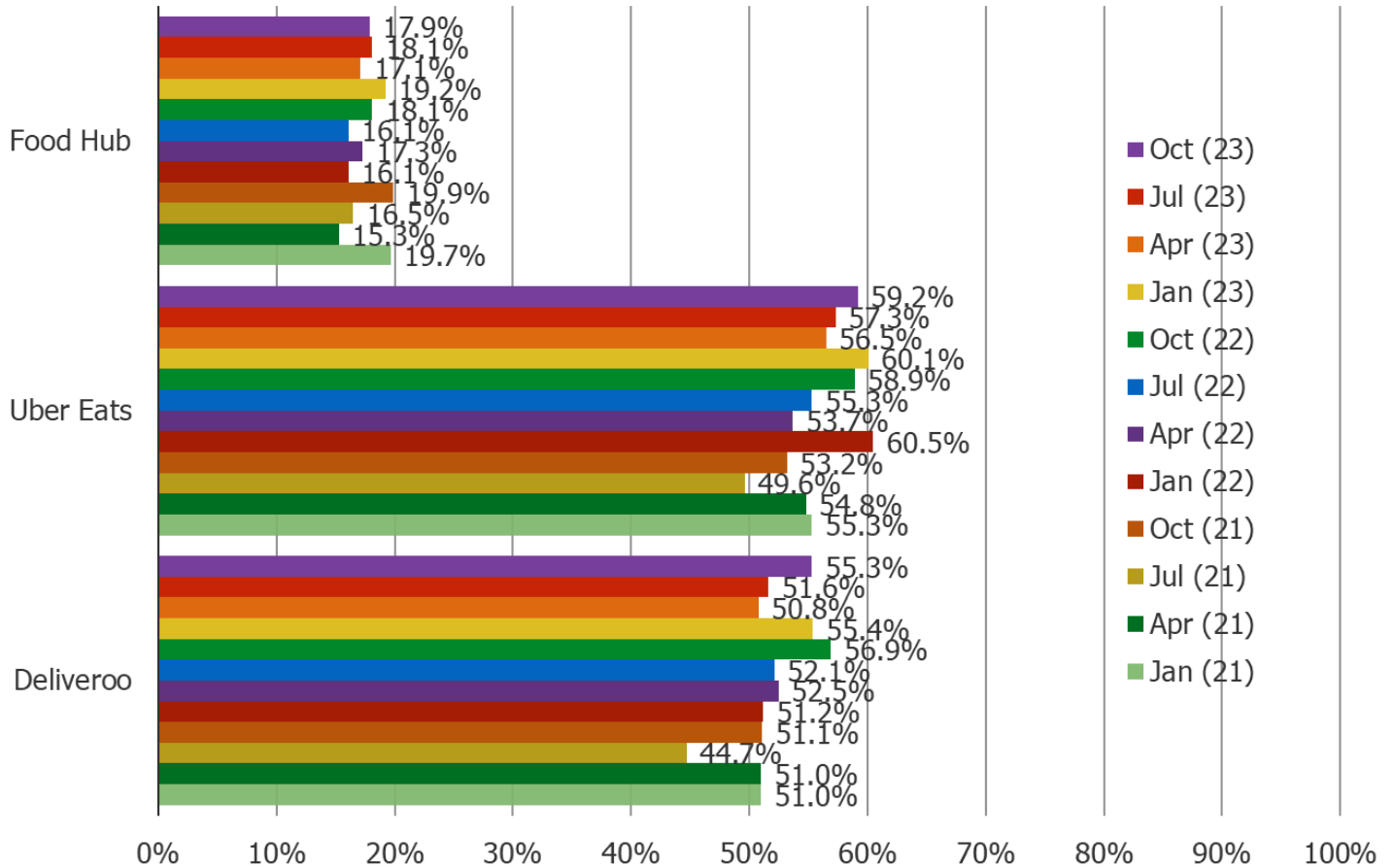
WHAT IS YOUR EXPERIENCE WITH THE FOLLOWING MEAL DELIVERY APPS/SERVICES?

Posed to all respondents.



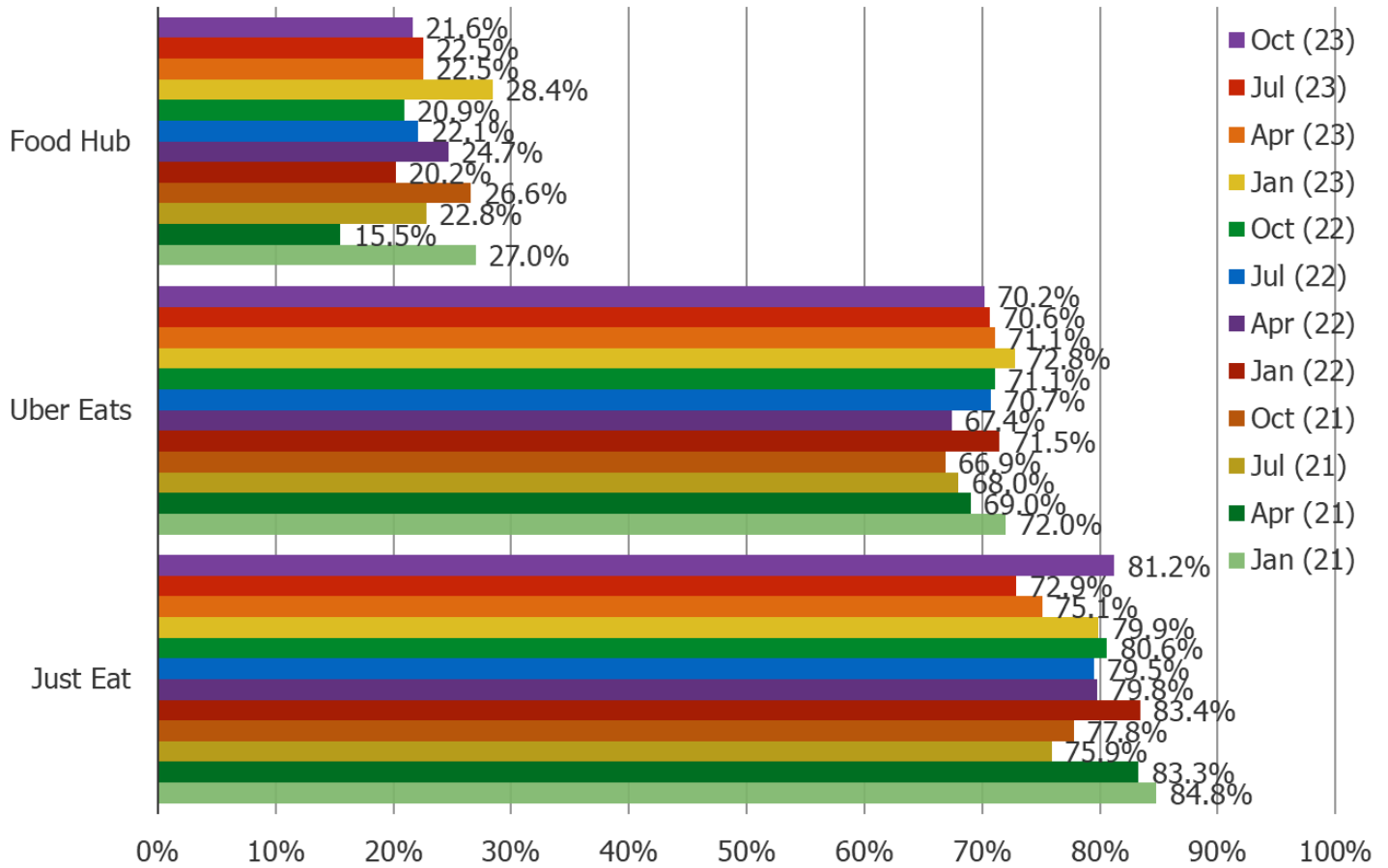
USAGE CROSS-OVER: **JUST EAT** USERS (REGULARLY OR OCCASIONALLY) ALSO USES (REGULARLY OR OCCASIONALLY)

Posed to Just Eat users.



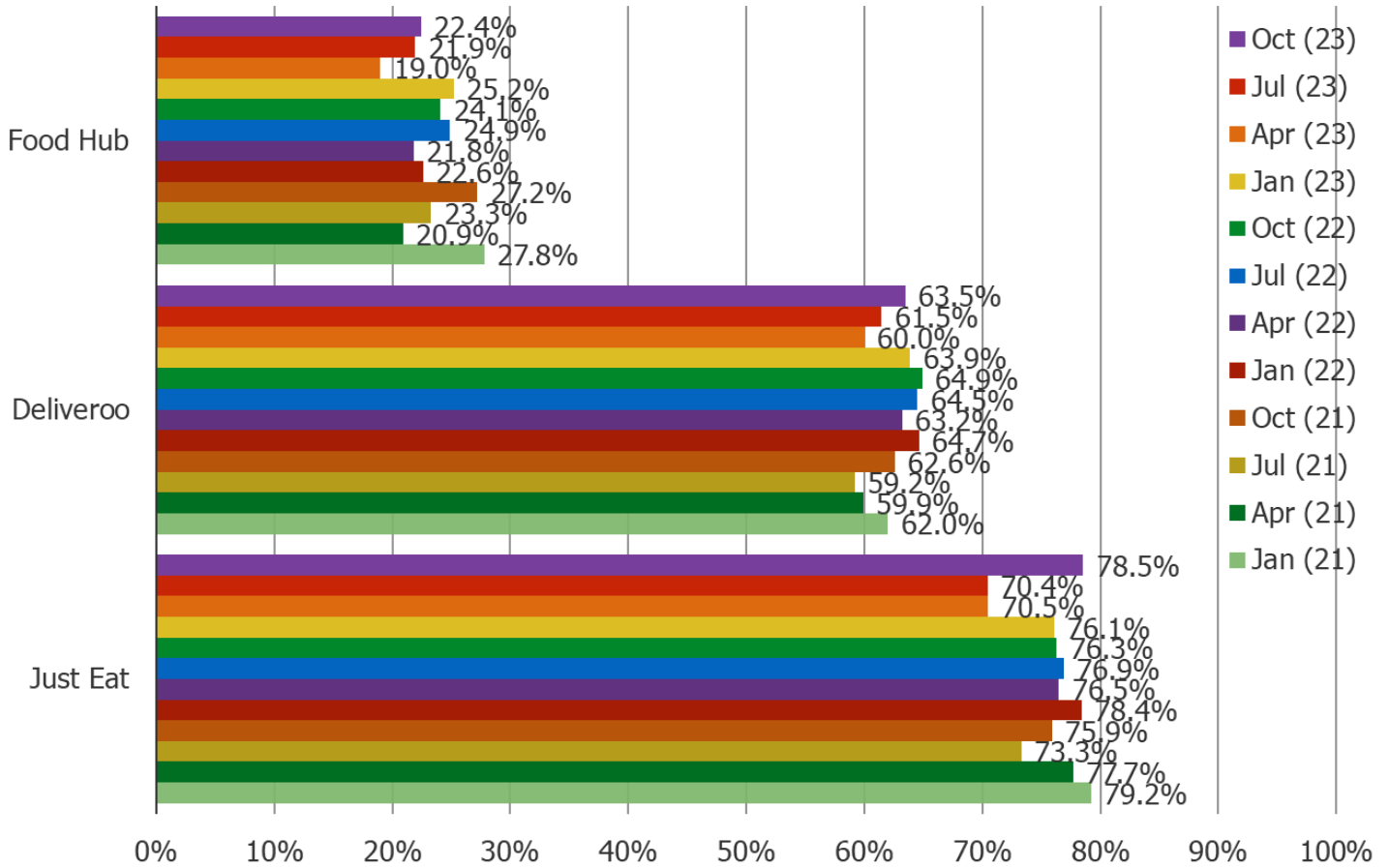
USAGE CROSS-OVER: DELIVEROO USERS (REGULARLY OR OCCASIONALLY) ALSO USES (REGULARLY OR OCCASIONALLY)

Posed to Deliveroo users.



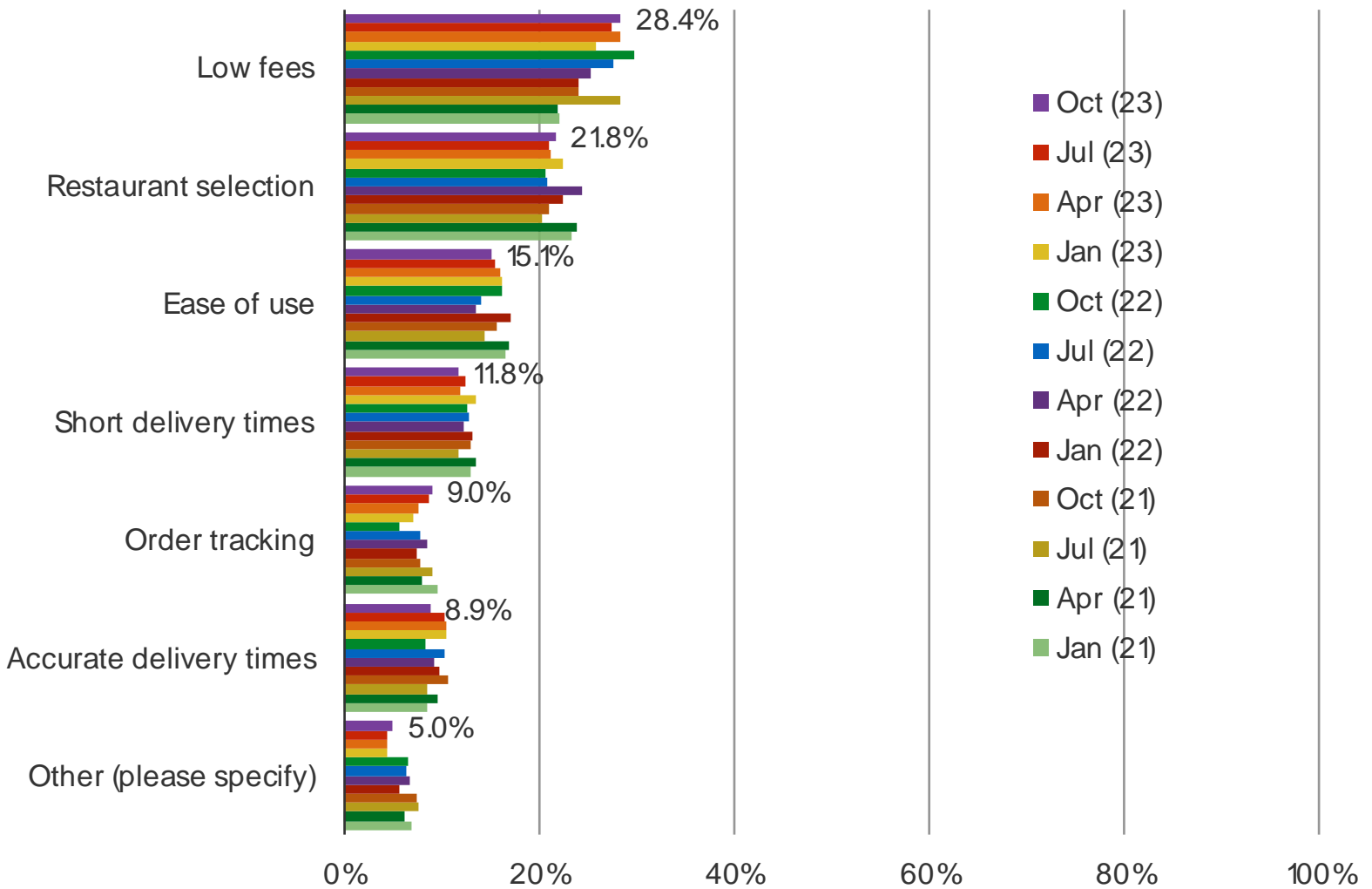
USAGE CROSS-OVER: UBER EATS USERS (REGULARLY OR OCCASIONALLY) ALSO USES (REGULARLY OR OCCASIONALLY)

Posed to Uber Eats users.



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

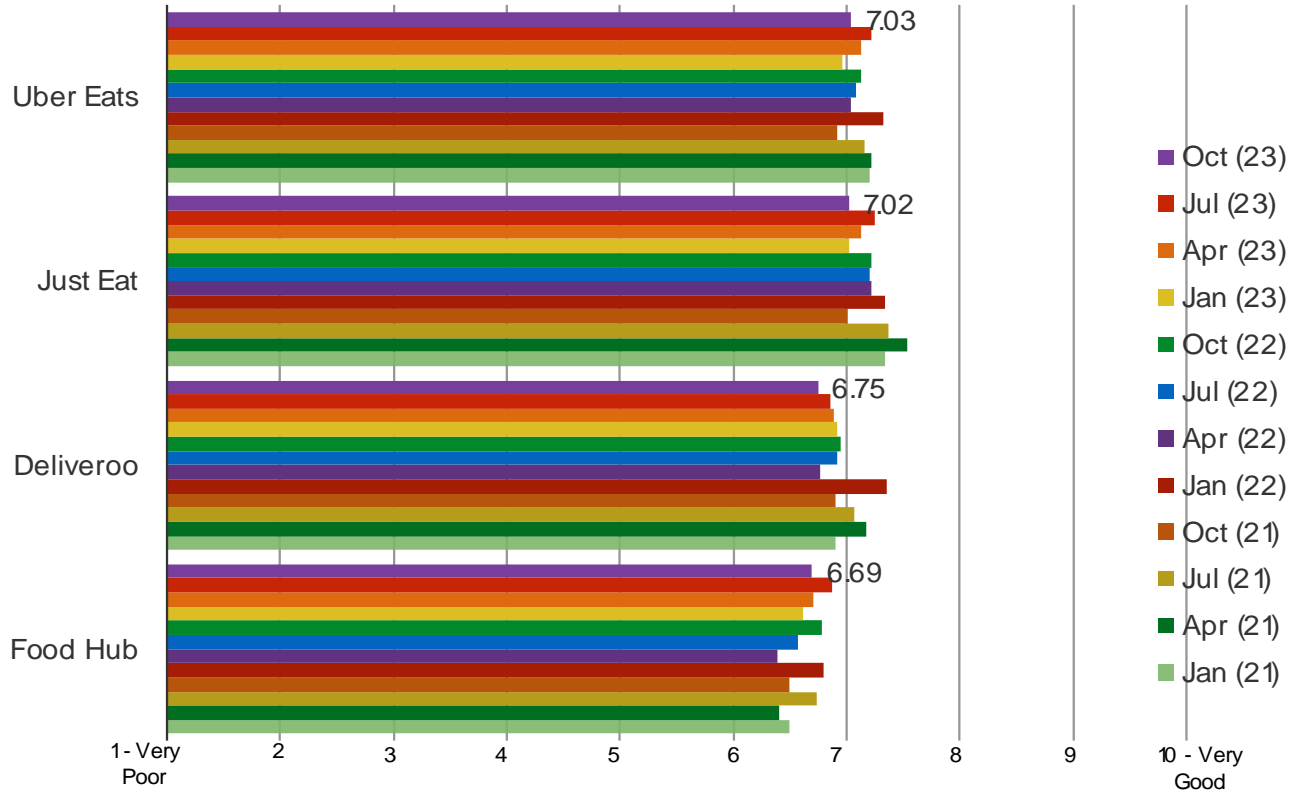
Posed to all respondents.



FOOD DELIVERY APP CUSTOMER SENTIMENT

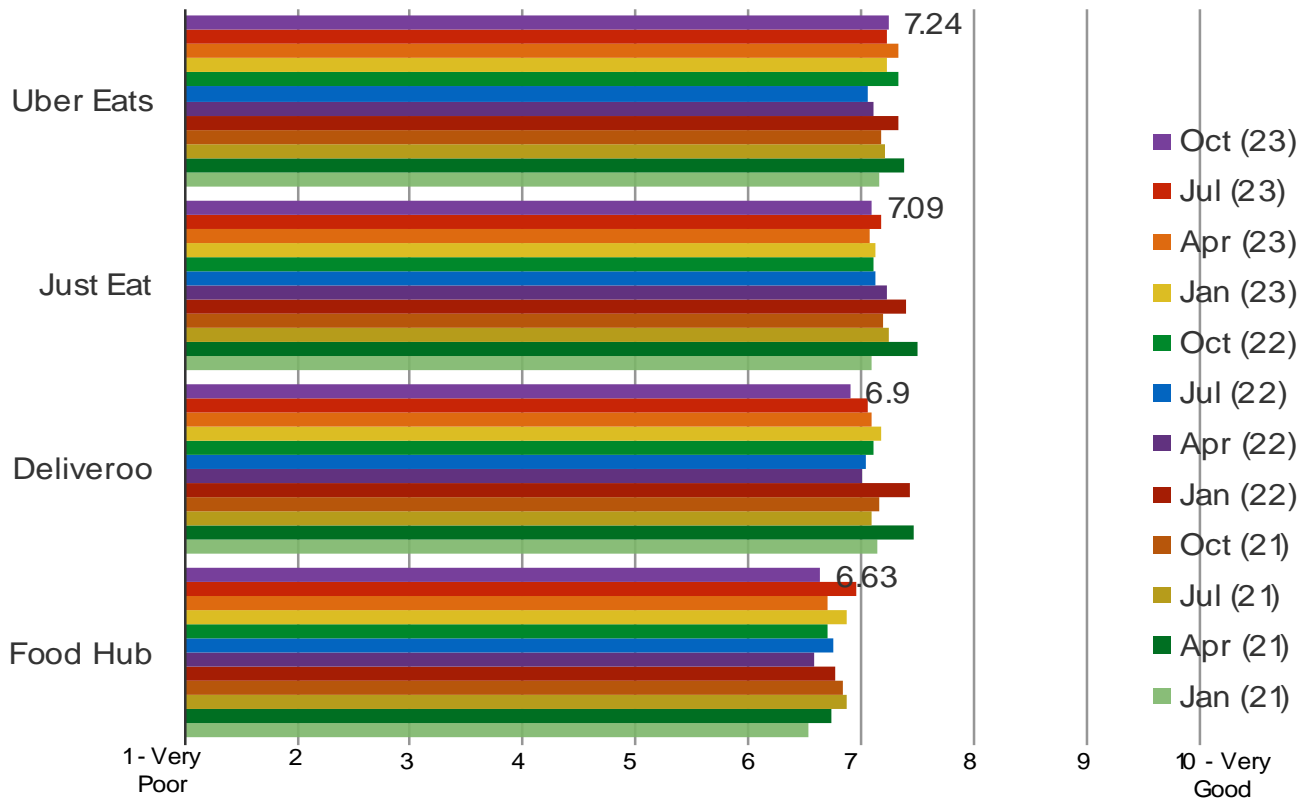
PLEASE RATE HOW GOOD THE FOLLOWING ARE WHEN IT COMES TO USER EXPERIENCE:

Posed to all respondents.



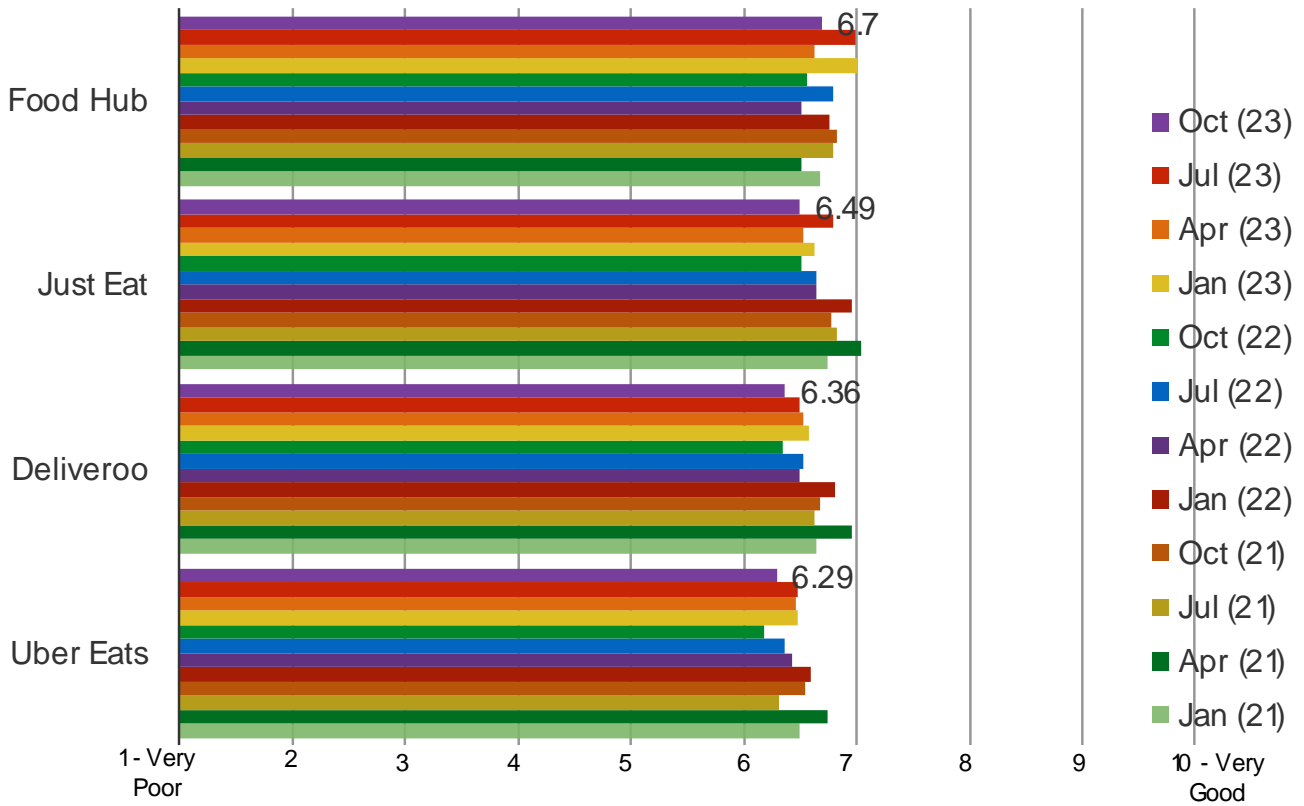
PLEASE RATE THE FOLLOWING WHEN IT COMES TO RESTAURANT SELECTION...

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.

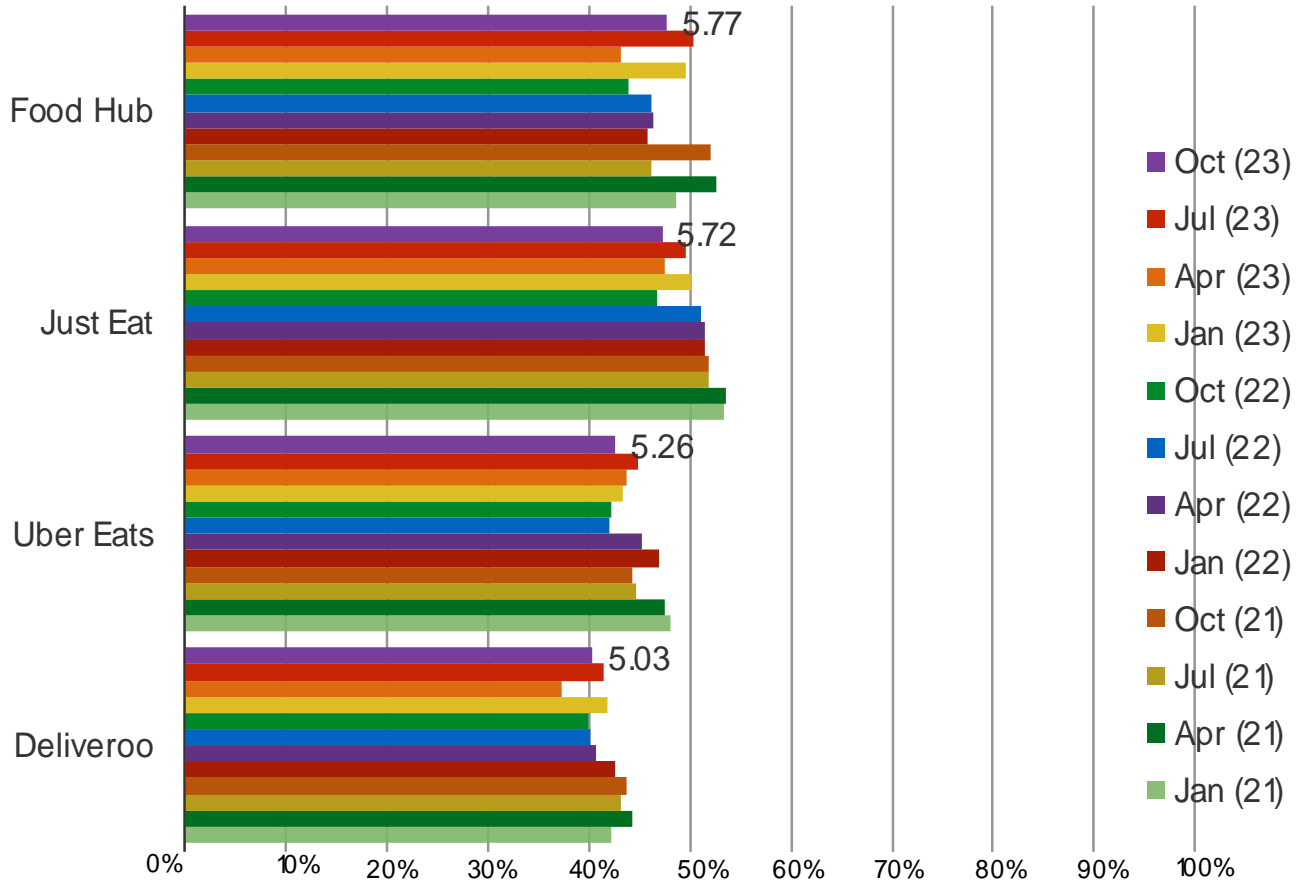


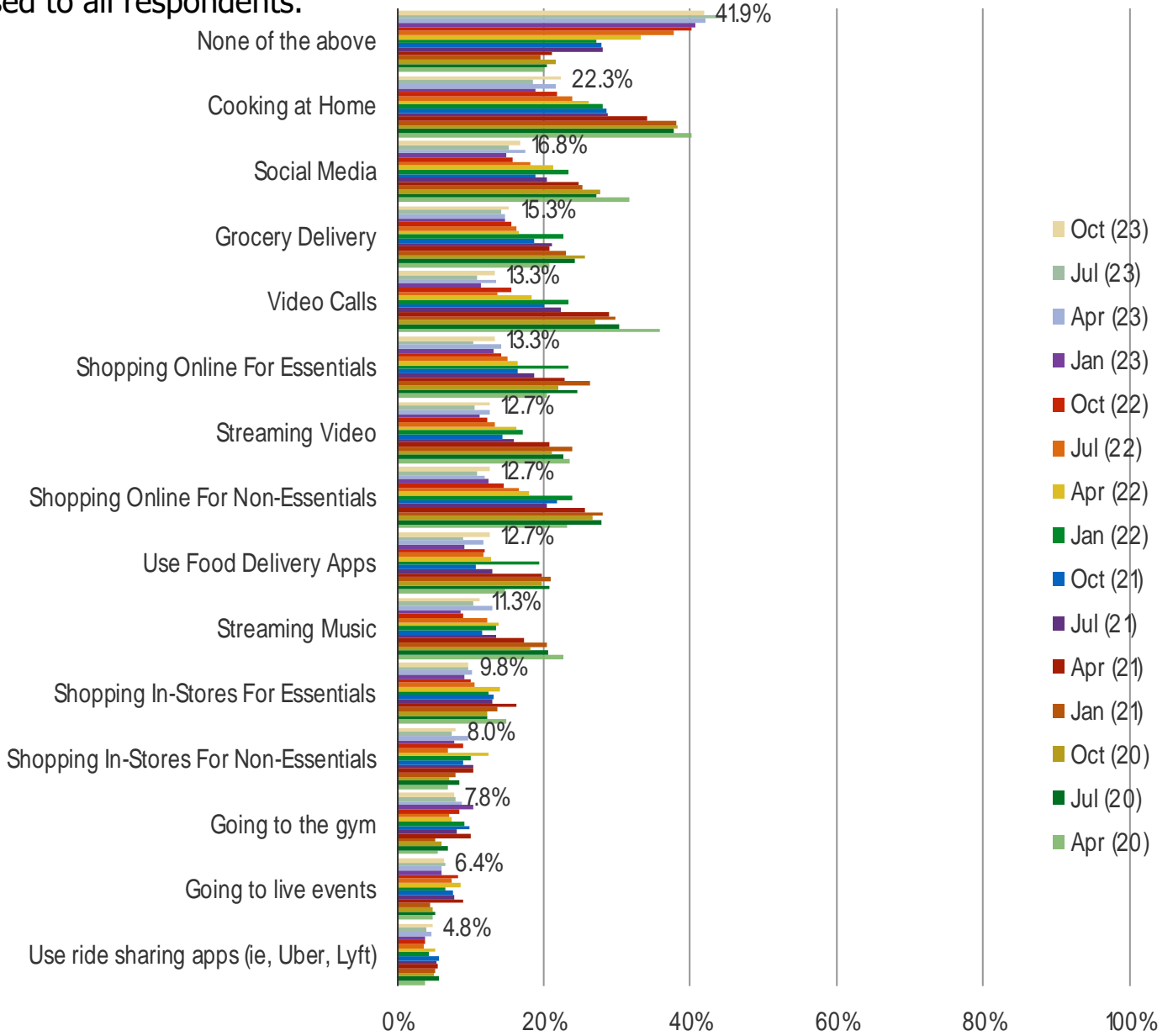
Chart above is a weighted average in which:

- 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

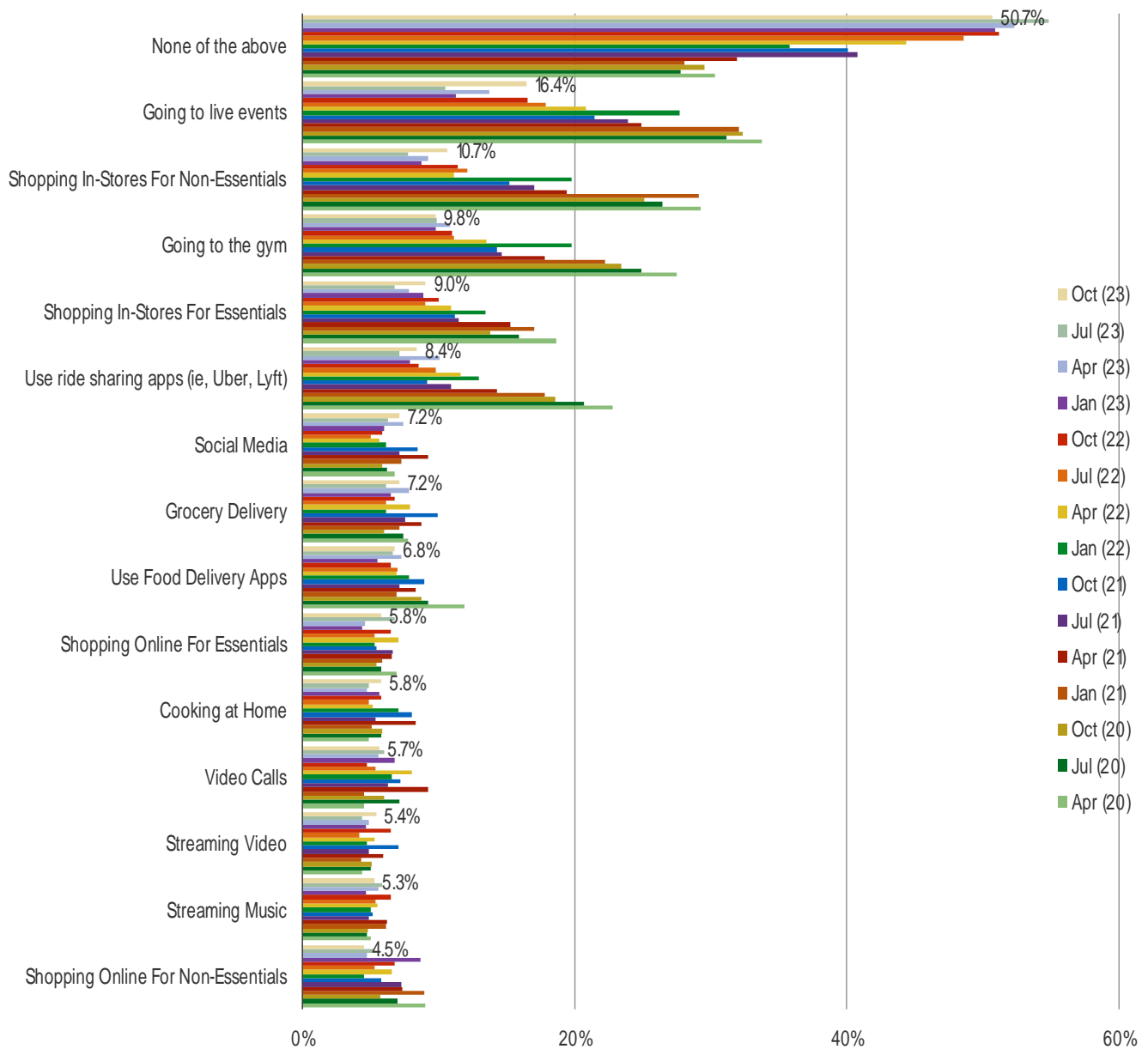
GOING FORWARD, WILL YOU DO ANY OF THE FOLLOWING MORE BECAUSE OF THE CORONAVIRUS AND SOCIAL DISTANCING? SELECT ALL THAT APPLY

Posed to all respondents.



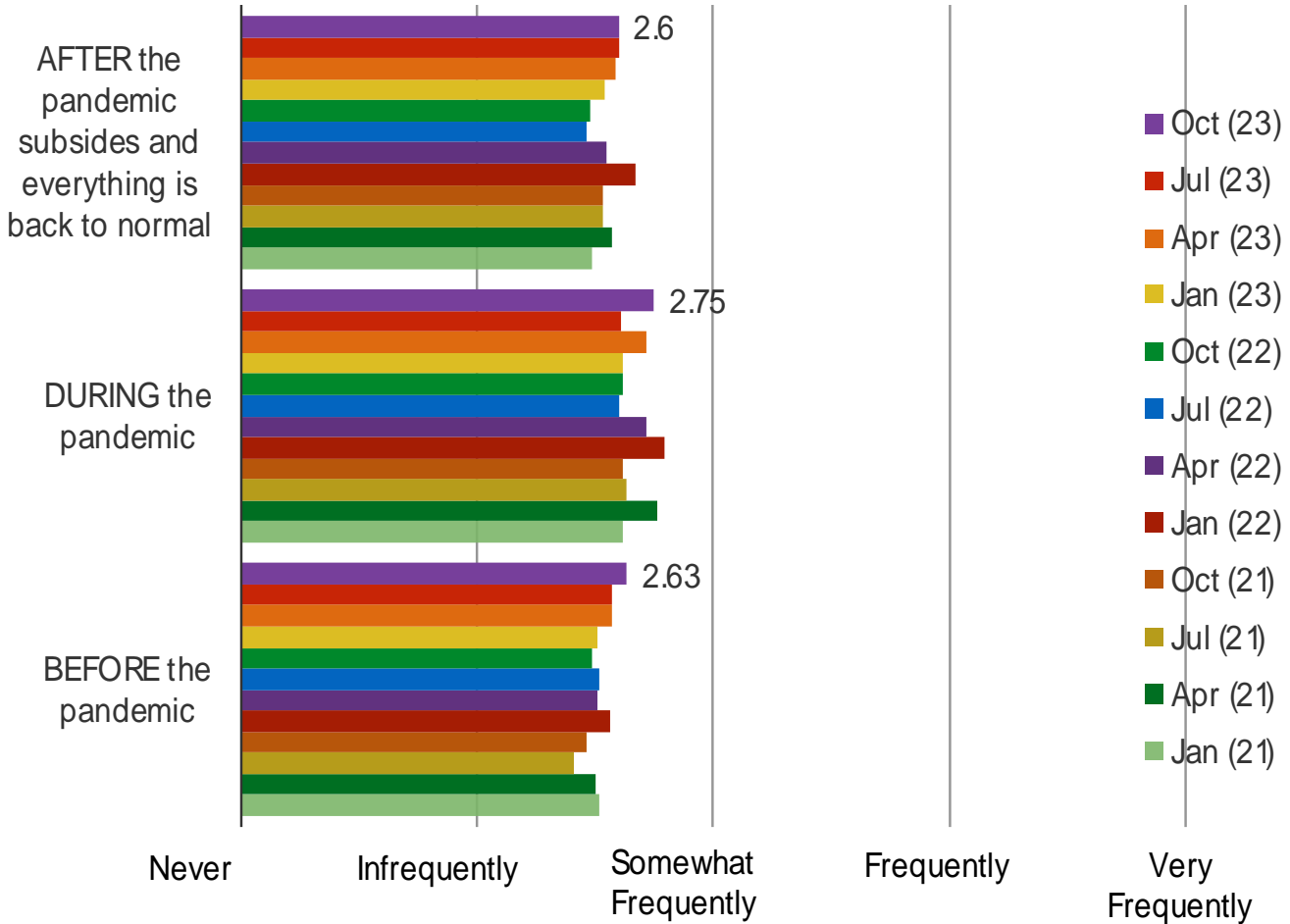
GOING FORWARD, WILL YOU DO ANY OF THE FOLLOWING LESS BECAUSE OF THE CORONAVIRUS AND SOCIAL DISTANCING? SELECT ALL THAT APPLY

Posed to all respondents.



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

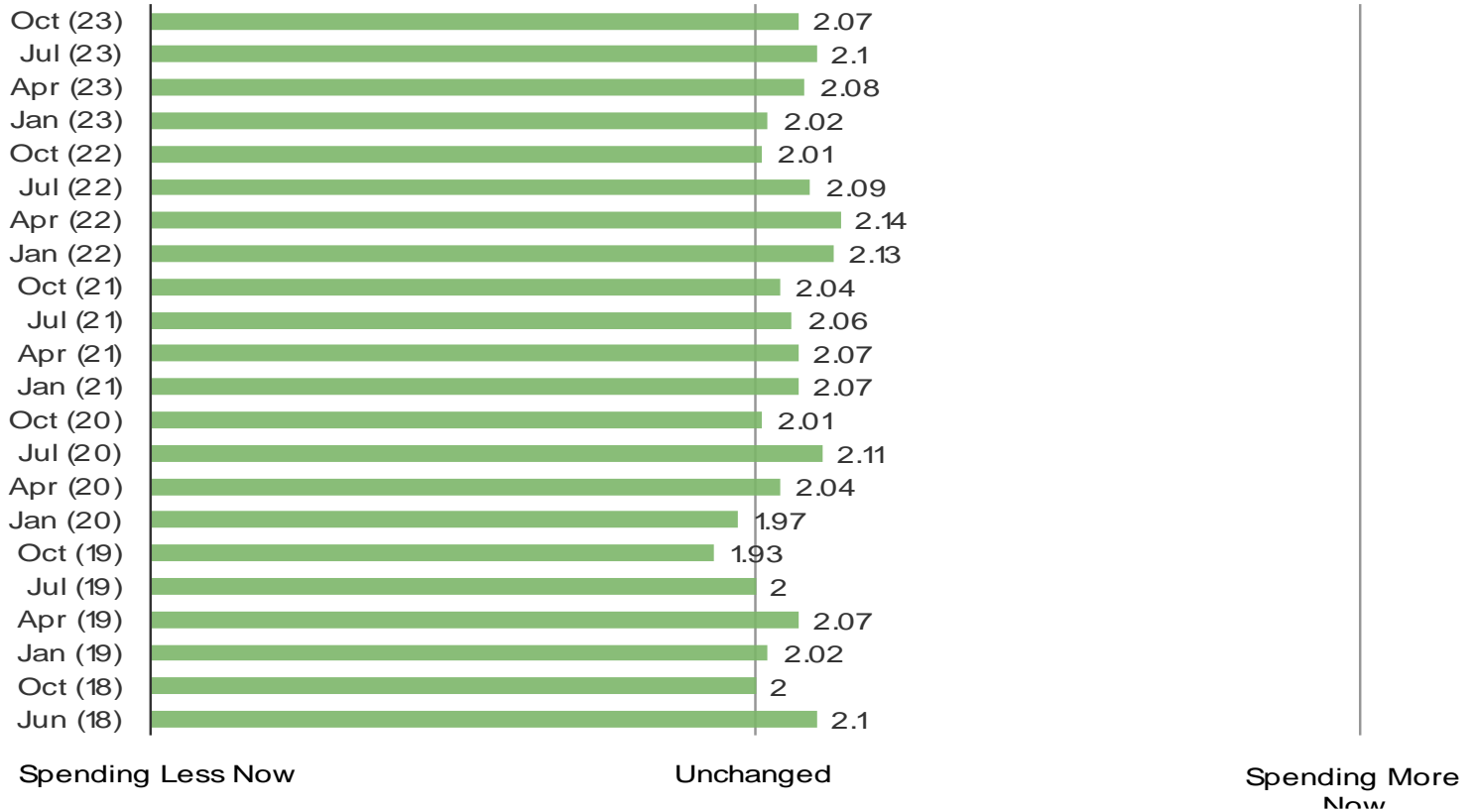
Posed to all respondents.



GROCERY STORES SHOPPING TRENDS

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

Posed to all respondents.



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

Posed to all respondents.

