Global Overview
Food delivery & Takeaway – COVID-19

As of 20th June 2020
Advertisers continue to enjoy cheaper clicks & stronger consumer engagement (across most countries)

Comparing June daily avg. to Jan 2020 daily avg. across metrics
Source: Internal Data
Demand is tapering as summer kicks in and lockdown eases
What is expected in Autumn and beyond? What if there is a second wave???

Weekly search volume & clicks indexed to Pre COVID-19* weekly average

United Kingdom

Canada

Germany

France

Netherland

Spain

The preferred day(s) for a takeaway has changed pre COVID-19. Greater change in some countries (ES, FR, DE) than the others.

Search volume share across days of the week:

- **United Kingdom**
- **Canada**
- **Netherland**
- **Spain**
- **France**
- **Germany**

Source: Internal Data, All Device,

*COVID-19 Period is 1st Apr to 20th Jun 2020, Pre COVID-19 is 5th Jan to 15th Feb 2020*
Changing competition and brand preferences
UK - Preference shifting from pizza to burgers, pubs and more

Avg. daily search volume trends by brands
Pre COVID-19 vs. COVID-19 period and MoM Apr – Jun 2020

Delivery Services

Restaurants, pubs and eateries

Source: Internal Data, All Device
*COVID-19 Period is 1st Apr to 20th Jun 2020
DE – Online food ordering seem to be dipping as lockdown eases

Avg. daily search volume trends by brands
Pre COVID-19 vs. COVID-19 period and MoM Apr – Jun 2020

Restaurants, pubs and eateries

Source: Internal Data, All Device
*COVID-19 Period is 1st Apr to 20th Jun 2020
Online food ordering seem to be dipping as lockdown eases

Avg. daily search volume trends by brands
Pre COVID-19 vs. COVID-19 period and MoM Apr – Jun 2020

Restaurants, pubs and eateries

- Uber Eats: 99% (Pre), 69% (Apr), 77% (May), 31% (Jun)
- Deliveroo: -43% (Pre), -43% (Apr), -41% (May), -41% (Jun)
- Just Eat: -41% (Pre), -41% (Apr), -37% (May), -32% (Jun)
- Dominos: 34% (Pre), 19% (Apr), 21% (May), 55% (Jun)
- Burger King: 34% (Pre), 19% (Apr), 21% (May), 55% (Jun)
- Mc Donalds: -37% (Pre), -32% (Apr), -36% (May), -44% (Jun)
- Sushi Shop: 34% (Pre), 19% (Apr), 21% (May), 55% (Jun)
- Kiosque a Pizza: 44% (Pre), 44% (Apr), 44% (May), 44% (Jun)
- La Boite a pizza: 44% (Pre), 44% (Apr), 44% (May), 44% (Jun)
- Eat sushi: 34% (Pre), 19% (Apr), 21% (May), 55% (Jun)
- Tutti pizza: 77% (Pre), 31% (Apr), 19% (May), 34% (Jun)
- Cote sushi: 77% (Pre), 31% (Apr), 19% (May), 34% (Jun)

Source: Internal Data, All Device
*COVID-19 Period is 1st Apr to 20th Jun 2020
NL - Online food ordering seem to be dipping as lockdown eases

Avg. daily search volume trends by brands
Pre COVID-19 vs. COVID-19 period and MoM Apr – Jun 2020

Restaurants, pubs and eateries

Source: Internal All Device

*COVID-19 Period is 1st Apr to 20th Jun 2020
ES - Online food ordering seem to be dipping as lockdown eases

Avg. daily search volume trends by brands
Pre COVID-19 vs. COVID-19 period and MoM Apr – Jun 2020

Restaurants, pubs and eateries

Source: Internal Data, All Device
*COVID-19 Period is 1st Apr to 20th Jun 2020
CA – Stable demand continues into June

Avg. daily search volume trends by brands
Pre COVID-19 vs. COVID-19 period and MoM Apr – Jun 2020

Restaurants, pubs and eateries

Source: Internal Data, O&O Search Data, All Device
*COVID-19 Period is 1st Apr to 20th Jun 2020
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<th>Highlights &amp; Recommendations</th>
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| **Continue to enjoy greater demand & lower CPC**  
Continued social distancing implies greater volumes so far. Expand and optimise to achieve broader coverage as you pay lesser per click | **Revise and revamp your ad copies and landing page content**  
Continue to reflect today’s needs and sentiments through your ad copies & Landing pages – like contact free, ... | **Audience Targeting**  
Adopt and expand into  
- MSAN  
- In-Market audience  
- LinkedIn Targeting |
| **Retargeting**  
Retargeting & Re-engage with consumers who visited your site in the recent months. | **Day of the week targeting**  
Optimise your performance by setting up incremental bidding. Remember it varies across markets. | **Strategize and continue to get competitive**  
Demand & competition is expected to stay strong also into autumn during these times of uncertainty. Optimise & budget regularly for changing trends and demand. |