



# Global Overview Food delivery & Takeaway – COVID-19

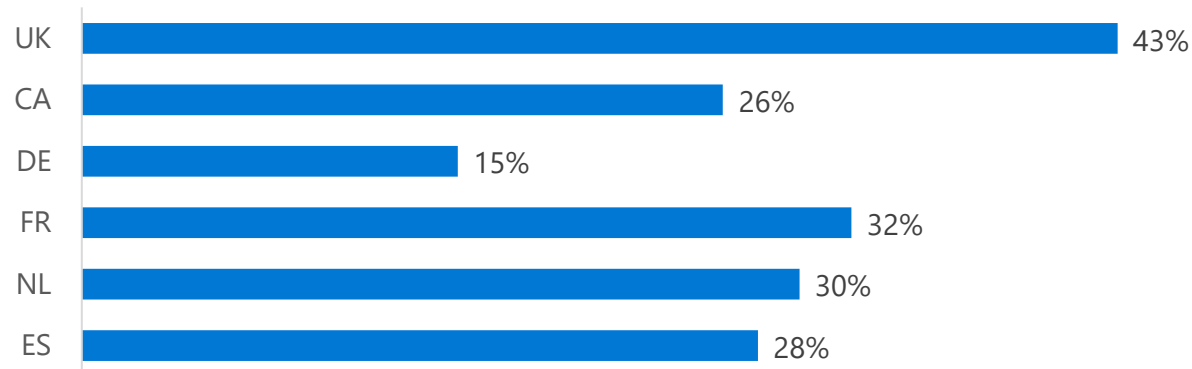
As of 20<sup>th</sup> June 2020



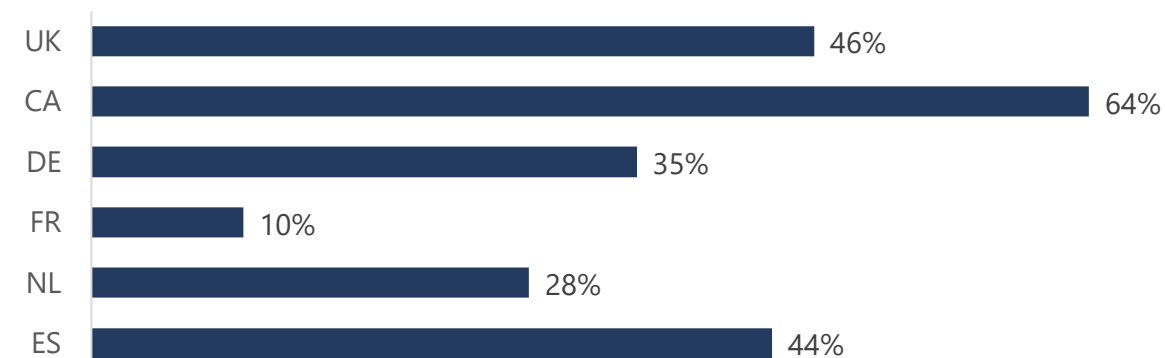
# Advertisers continue to enjoy cheaper clicks & stronger consumer engagement (across most countries)

Daily search volume comparison  
Jun over Jan 2020

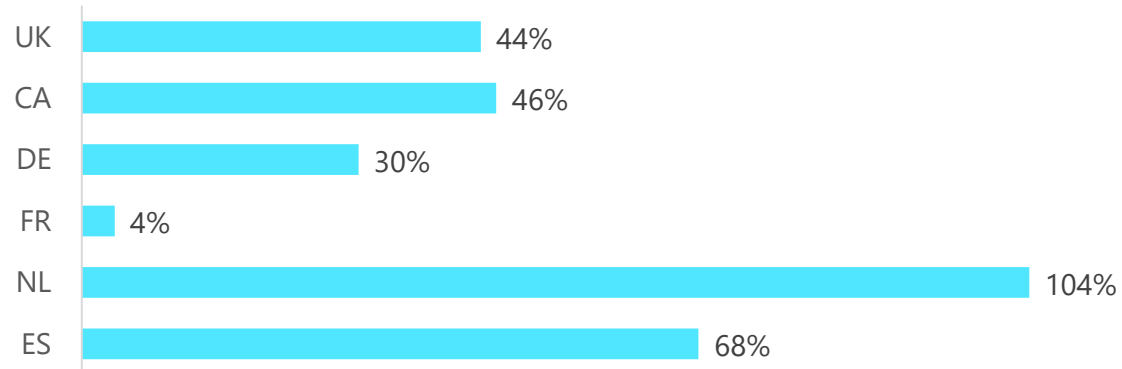
Volume



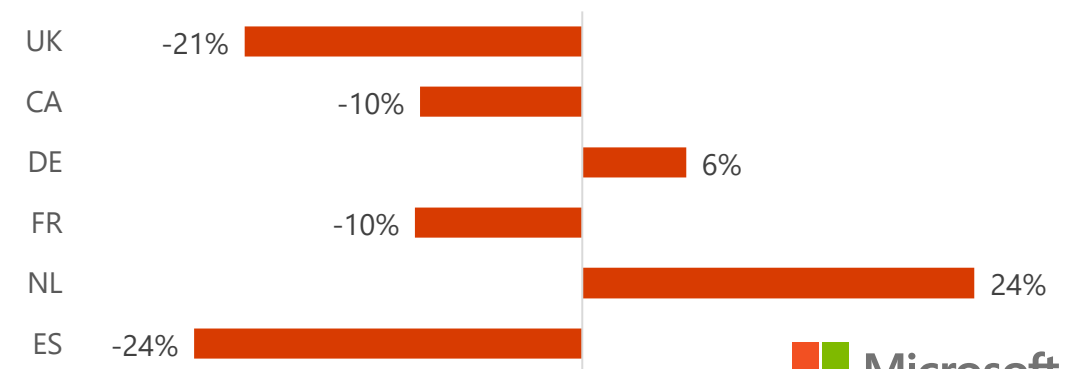
Clicks



Avg. CTR



Avg. CPC

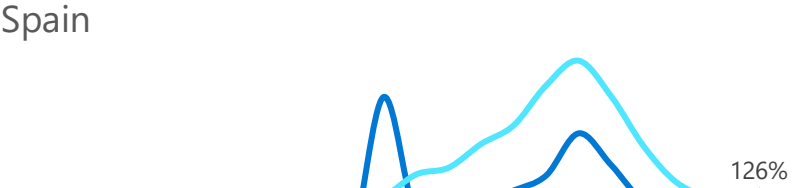
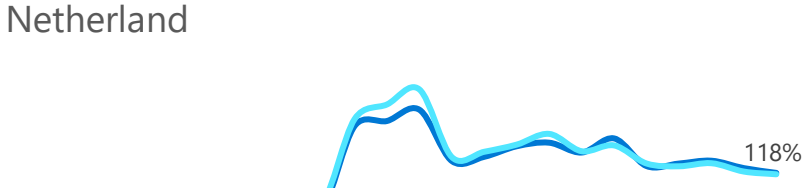
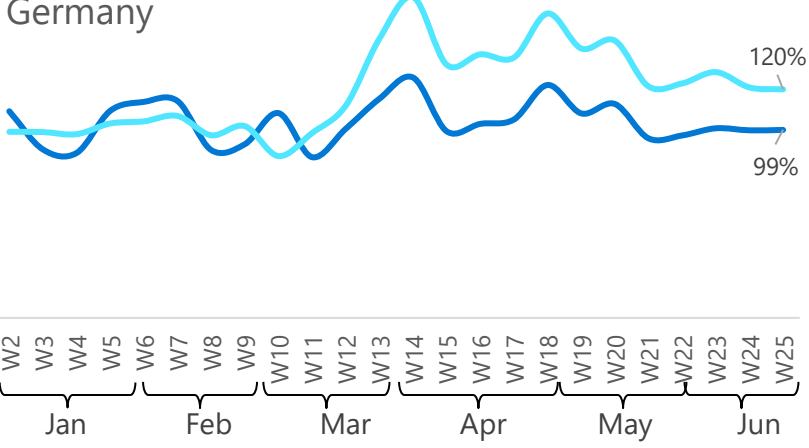
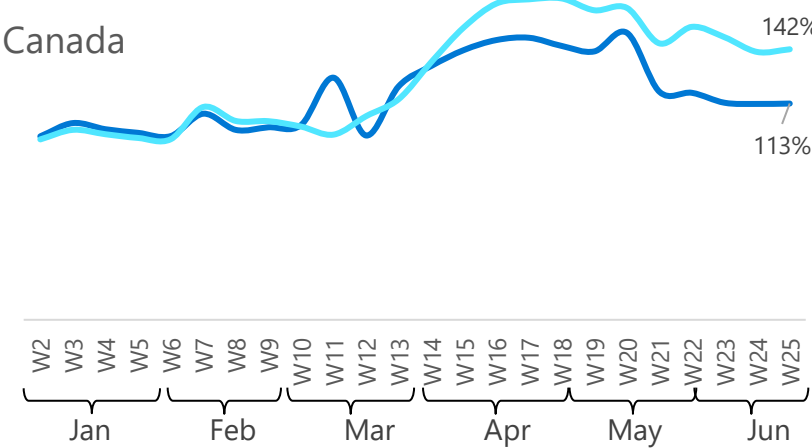
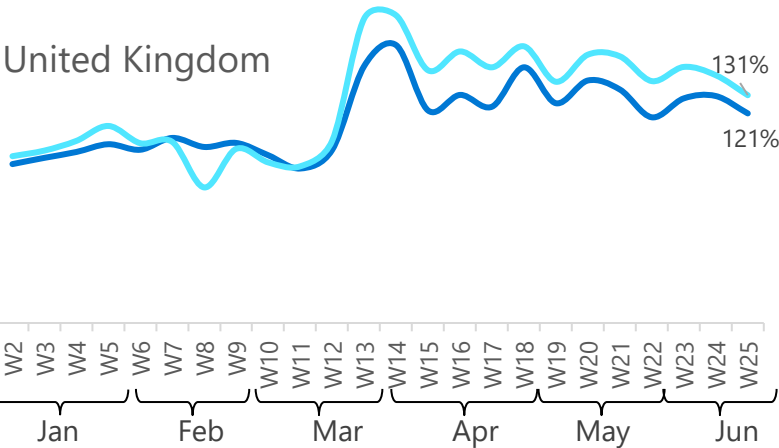


# Demand is tapering as summer kicks in and lockdown eases

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

■ Volume ■ Clicks



Source: Internal Data, \*Pre COVID-19 is W2 – starting on 5<sup>th</sup> Jan 2020 to W25 ending on 20<sup>th</sup> Jun 2020

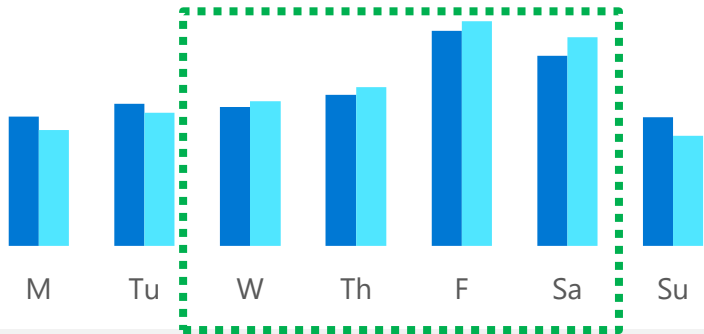
# The preferred day(s) for a takeaway has changed pre COVID-19

Greater change in some countries (ES, FR, DE) than the others

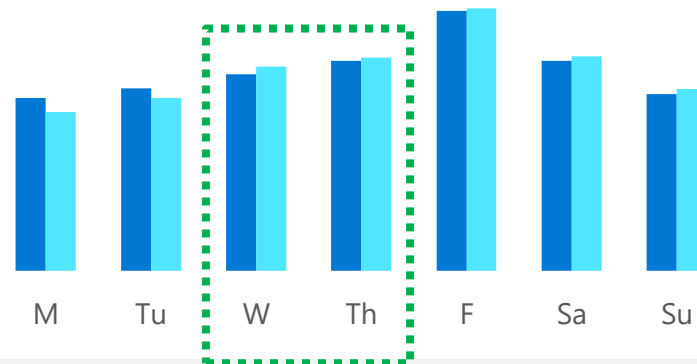
Search volume share across days of the week

■ Pre COVID-19 ■ COVID-19 Period\*

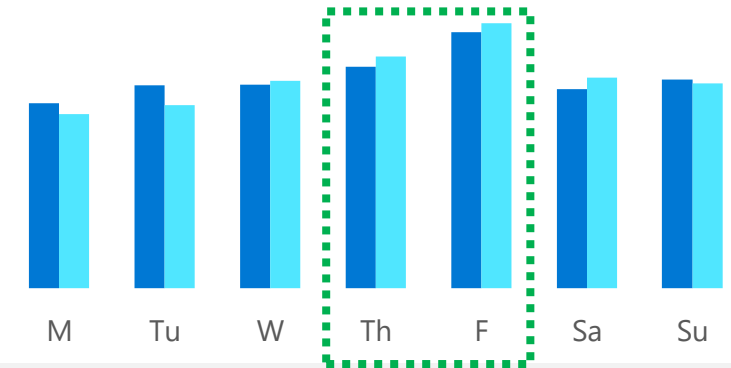
United Kingdom



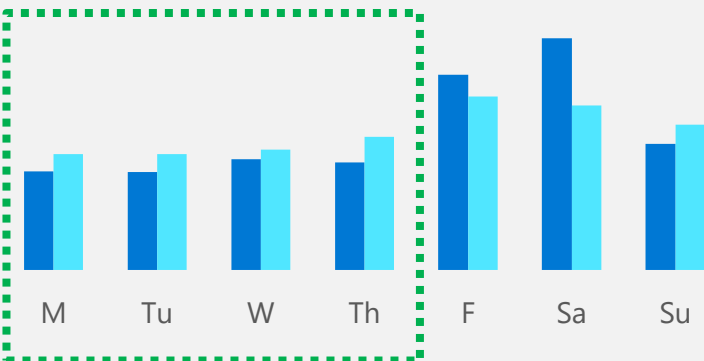
Canada



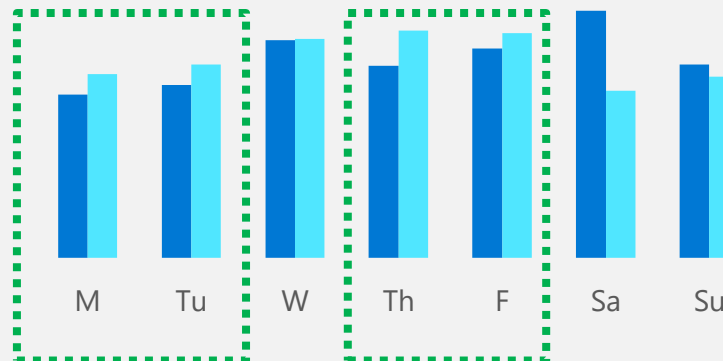
Netherland



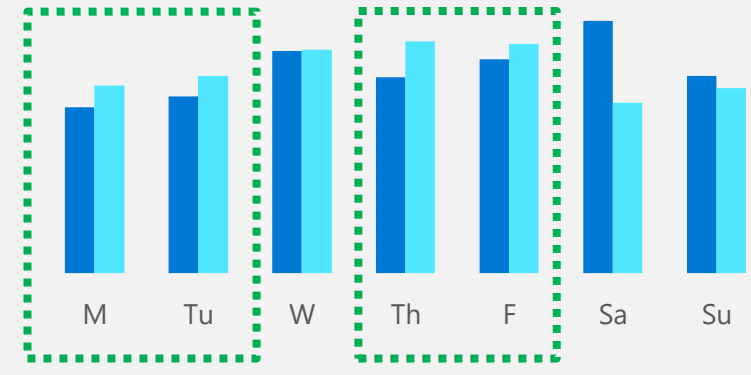
Spain



France



Germany



# Changing competition and brand preferences

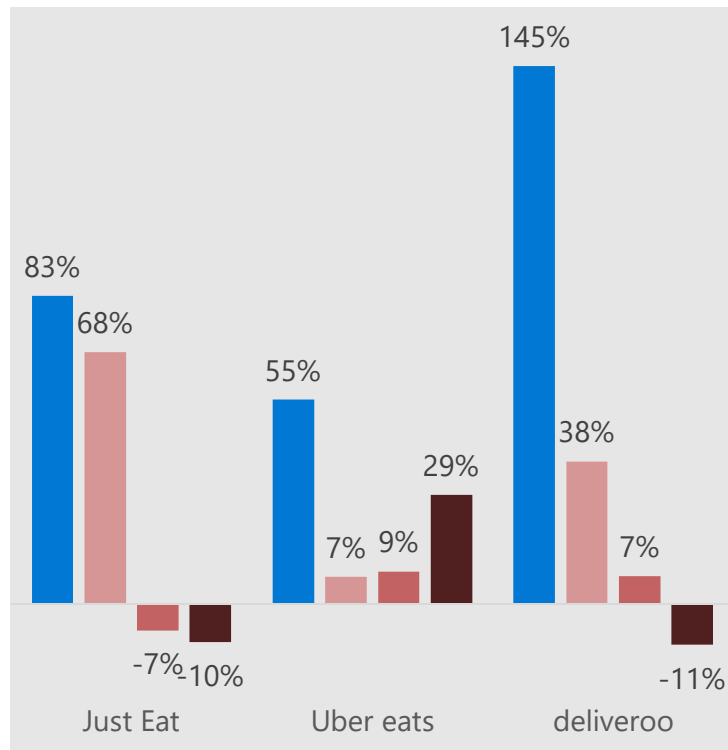


# UK - Preference shifting from pizza to burgers, pubs and more

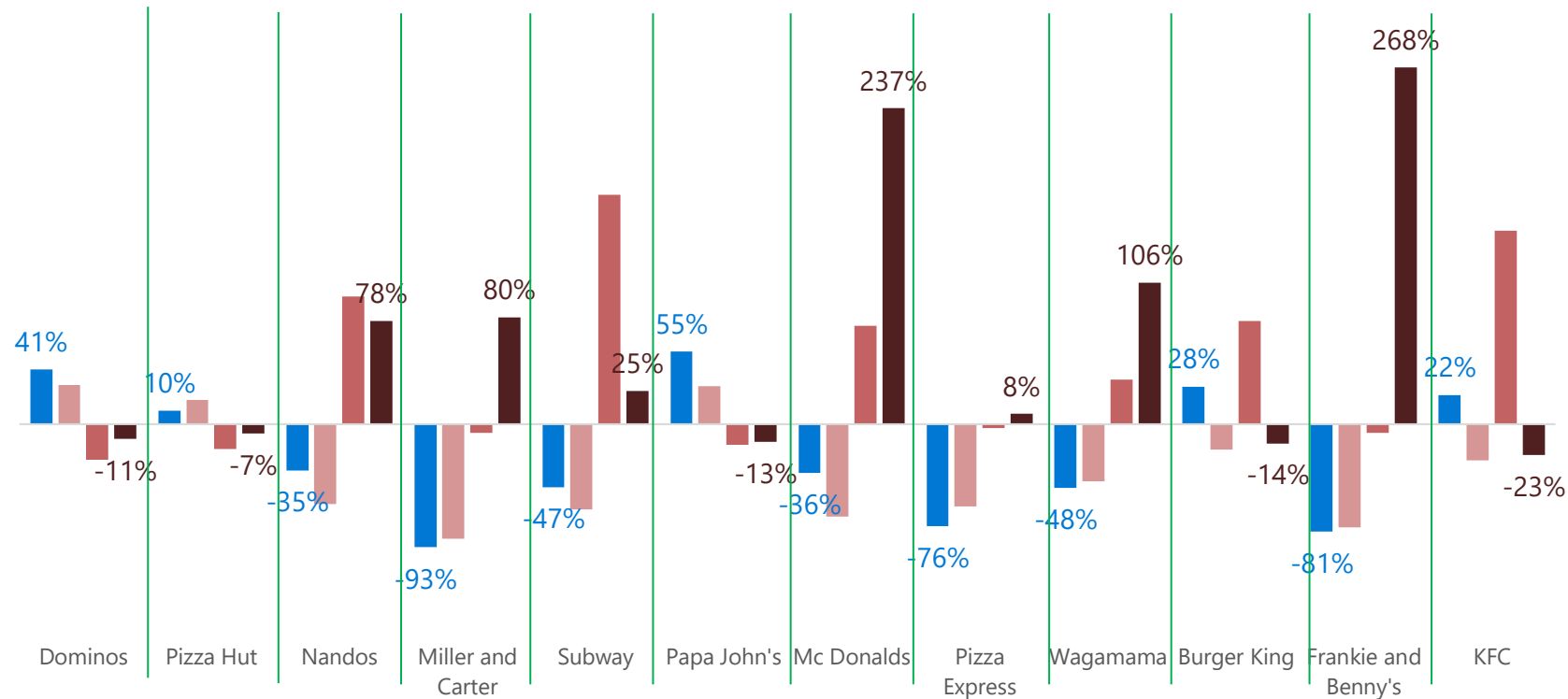
Avg. daily search volume trends by brands  
 Pre COVID-19 vs. COVID-19 period and MoM Apr – Jun 2020

■ Pre Vs. COVID-19 Period\* ■ Apr ■ May ■ Jun

## Delivery Services



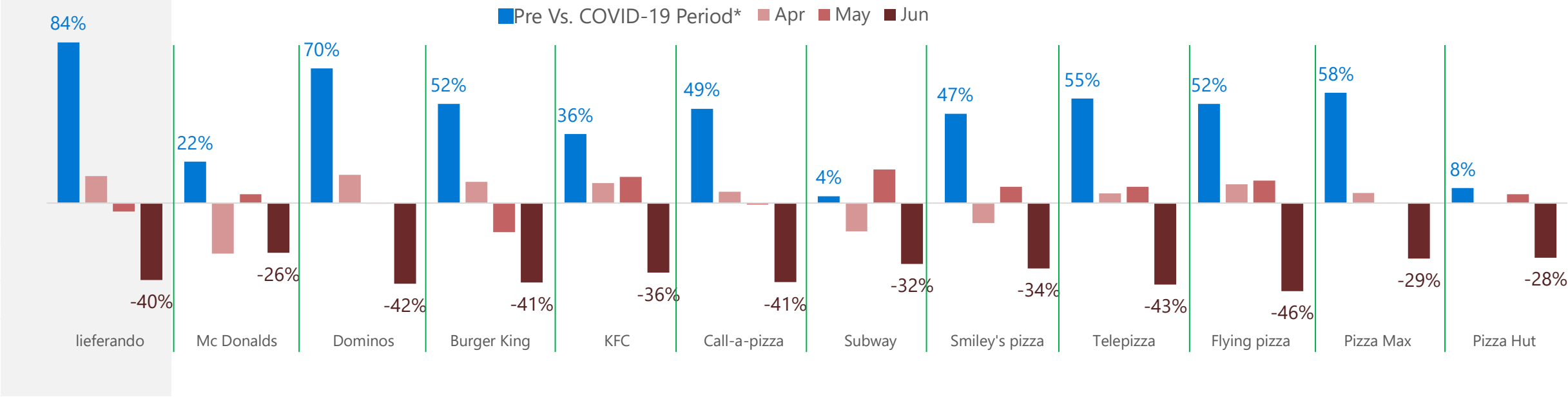
## Restaurants, pubs and eateries



# 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



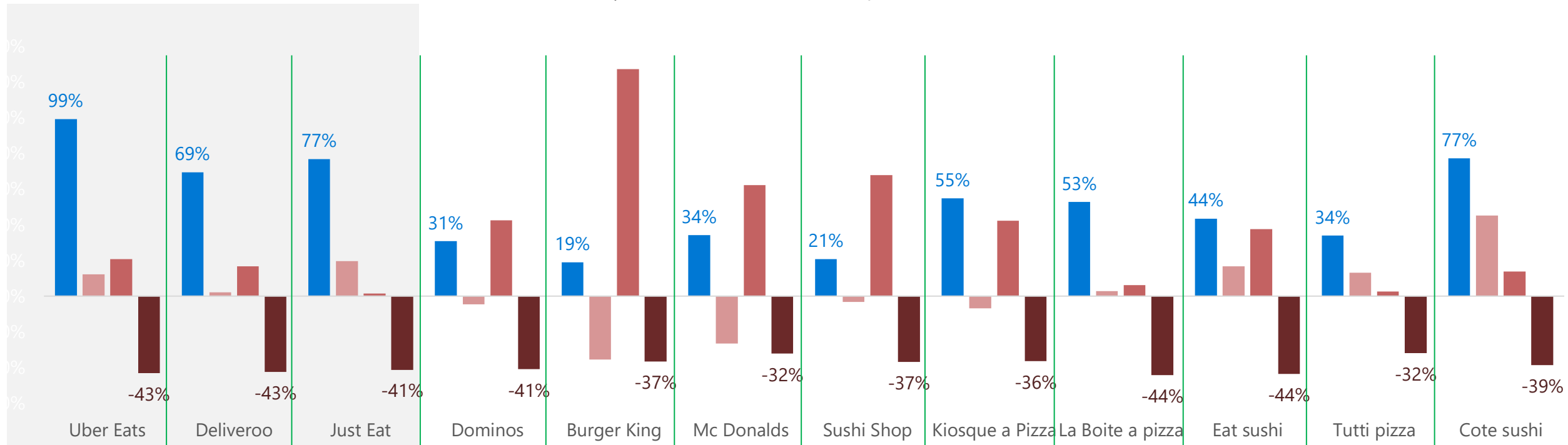
Source: Internal Data, All Device  
 \*COVID-19 Period is 1<sup>st</sup> Apr to 20<sup>th</sup> Jun 2020

# FR - 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

■ Pre Vs. Apr to Jun Period\* ■ Apr ■ May ■ Jun

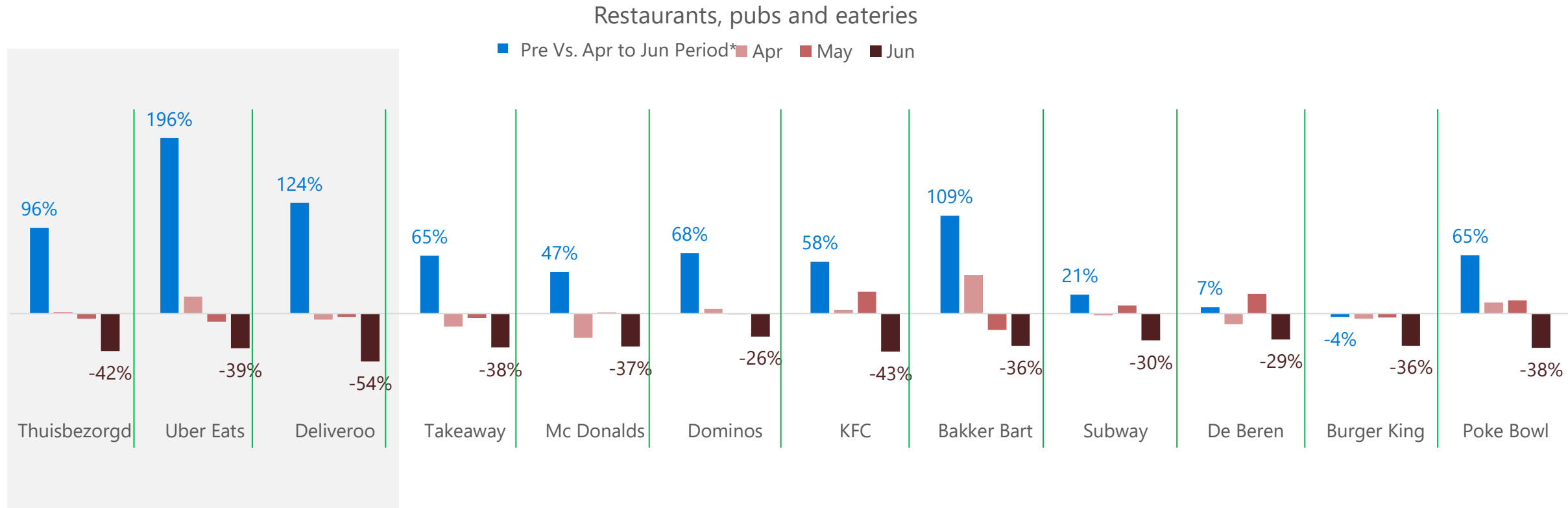


Source: Internal Data, All Device  
\*COVID-19 Period is 1<sup>st</sup> Apr to 20<sup>th</sup> Jun 2020



# NL - Online food ordering seem to be dipping as lockdown eases

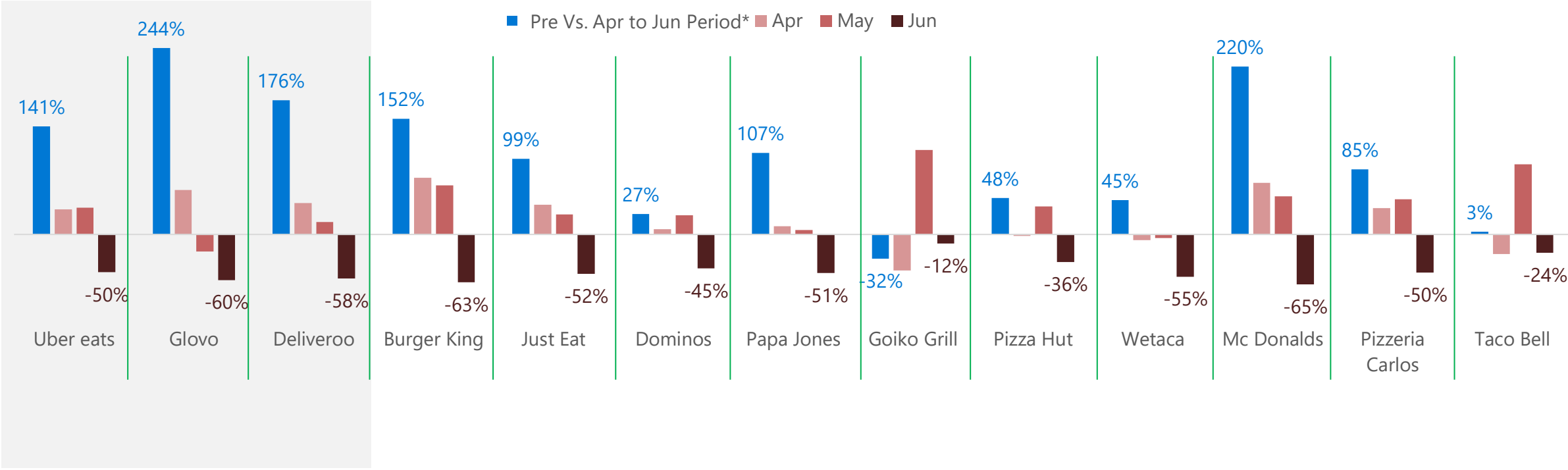
Avg. daily search volume trends by brands  
Pre COVID-19 vs. COVID-19 period and MoM Apr – Jun 2020



# 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



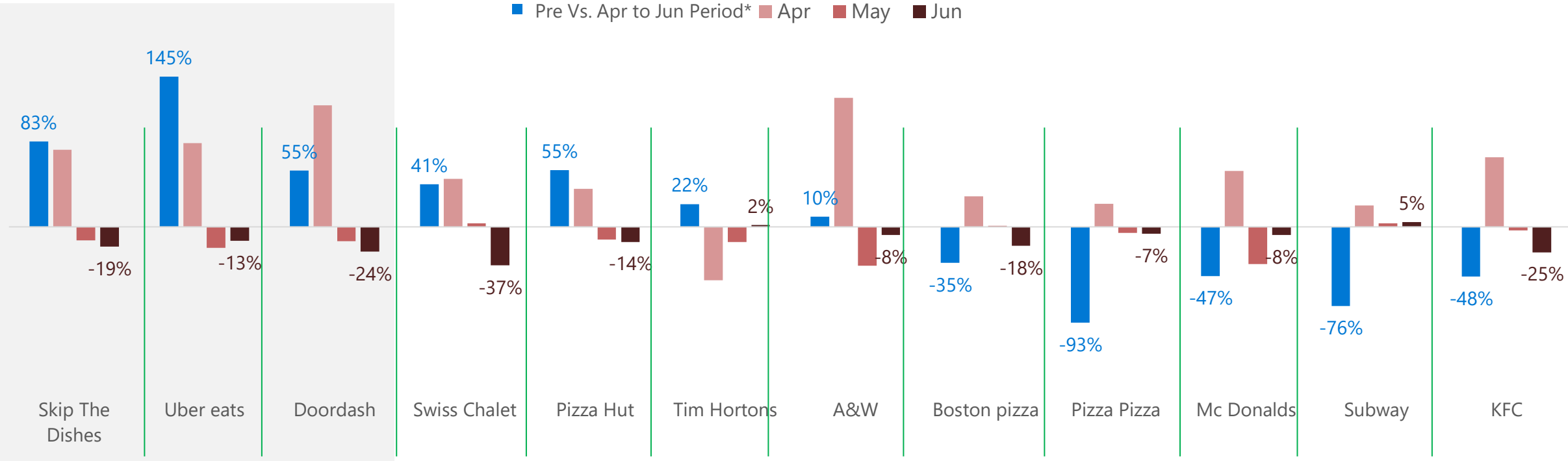
Source: Internal Data, All Device  
 \*COVID-19 Period is 1st Apr to 20th Jun 2020

# 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

■ Pre Vs. Apr to Jun Period\* ■ Apr ■ May ■ Jun



Source: Internal Data, O&O Search Data, All Device  
 \*COVID-19 Period is 1<sup>st</sup> Apr to 20<sup>th</sup> Jun 2020

# Highlights & Recommendations

## 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.