



Takeaway/delivery COVID-19 trends in the U.K.

As of March 14, 2020



UK-LATEST UPDATE

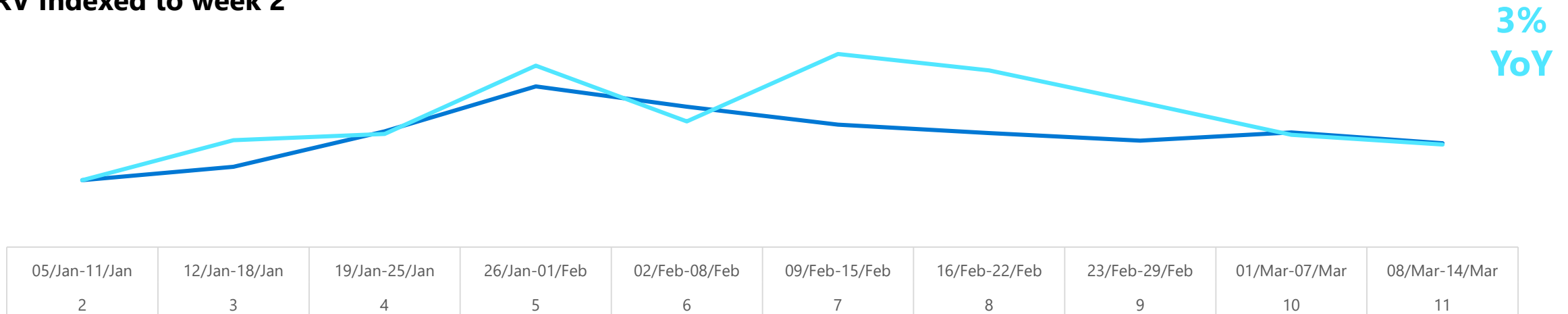
Coronavirus: Emergency planning rules will allow restaurants and pubs to operate as takeaways in bid to survive lockdown

HYPOTHESIS

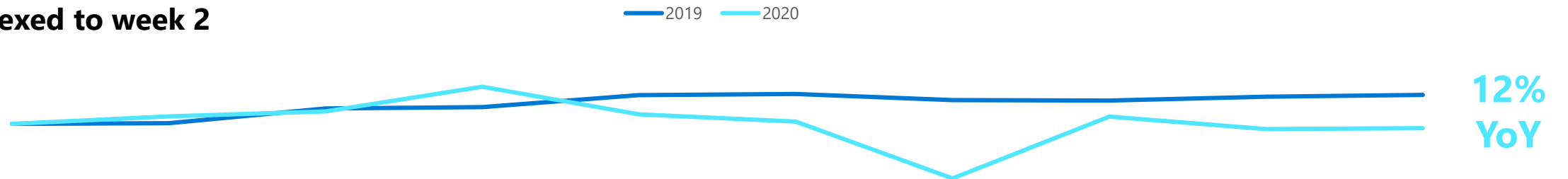
Under the recent scenario, pubs and restaurants are **forced to switch towards food delivery/take away service in UK**. Furthermore, as we see increase in people quarantining themselves and as UK head towards potential lockdown, we expect to see an increase in food delivery/take away services

UK: Food delivery/takeaway is flat so far, **but we expect it to surge over the next few weeks**

SPRV Indexed to week 2



Clicks Indexed to week 2



Source: Internal Data, Core O&O + Core O&O Rest, All Device

Italy : Lockdown led to increase in food delivery/ take away searches

SPRV Indexed to week 2

Overall 2% YoY

Lombardy & Veneto lockdown

All-country lockdown

Week 11: 98% YoY

2019
2020

05/Jan-11/Jan	12/Jan-18/Jan	19/Jan-25/Jan	26/Jan-01/Feb	02/Feb-08/Feb	09/Feb-15/Feb	16/Feb-22/Feb	23/Feb-29/Feb	01/Mar-07/Mar	08/Mar-14/Mar
2	3	4	5	6	7	8	9	10	11

Clicks Indexed to week 2

Overall 5% YoY

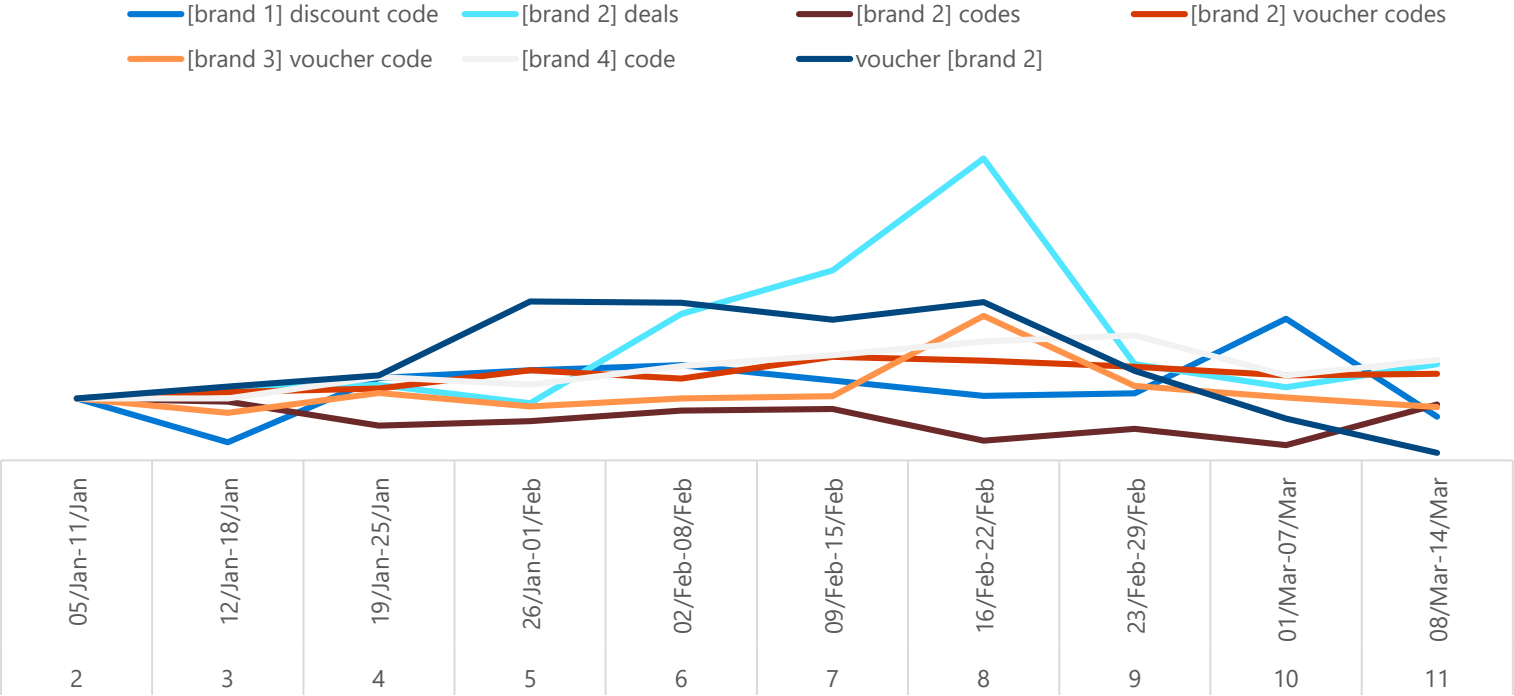
Week 11: 63% YoY

Source: Internal Data, Core O&O + Core O&O Rest, All Device



Promotions and offers influence people preferences

SPRV Indexed to week 2



Top 10 queries including promo* tokens

YoY Volume Searches	% of Volume Searches
voucher code [brand]	[brand] discount code
[brand] code	[brand] voucher codes
[brand] promo code	[brand] promo code
[brand] voucher	[brand] voucher code
[brand] promo code	[brand] promo code
[brand] offers	[brand] voucher
[brand] voucher codes	[brand] deals
deliveroo discount code	[brand] voucher code
[brand] code	[brand] code
[brand] voucher code	[brand] voucher

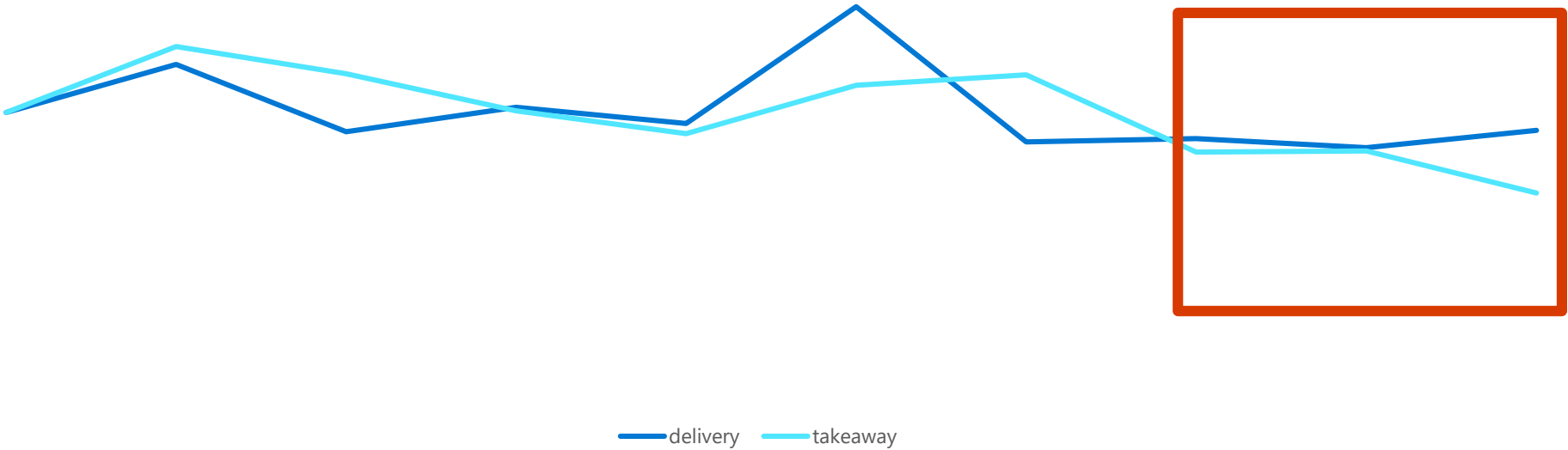
Source: Internal Data, Core O&O + Core O&O Rest, All Devices, March 2019 vs March 2020. Until 15th March
 *queries including tokens such as promo, code, voucher, offer, deal



Delivery searches increased in the last week.

This is a potential trend for the lockdown-quarantine period.

SPRV Indexed to week 2



Top 10 queries
[brand] delivery
pizza takeaway
Indian takeaway
[brand] pizza delivery
thai takeaway
takeaways
indian takeway
takeaway
takeaway menu
[brand] takeaway

05/Jan-11/Jan	12/Jan-18/Jan	19/Jan-25/Jan	26/Jan-01/Feb	02/Feb-08/Feb	09/Feb-15/Feb	16/Feb-22/Feb	23/Feb-29/Feb	01/Mar-07/Mar	08/Mar-14/Mar
2	3	4	5	6	7	8	9	10	11

Source: Internal Data, Core O&O + Core O&O Rest, All Device
 *YoY Calculated over March until the 15th (CY vs PY)



Stronger correlation between delivery and food than in 2019

Query correlation:

2019-Correlation		2020-Correlation		
	delivery		delivery	
home	0.19	home	0.24	+0.05
food	0.13	food	0.23	+0.10
meal	0.10	meal	0.13	+0.03
		breakfast	0.13	Brand new correlated tokens

Breakfast is the new correlation with delivery in 2020, possibly a new behavioural trend with the change in situation.

- Outstanding YoY increased correlation between **food** and **delivery**
- Overall **correlation uplift across all the tokens**

Stronger correlation between local and takeaway than in 2019

Query correlation:

2019-Correlation	
	takeaway
thai	0.26
near	0.19
menu	0.19
indian	0.19
house	0.16

2020-Correlation	
	takeaway
thai	0.26
house	0.2
local	0.19
near	0.19
indian	0.16

Brand new correlated tokens

New Correlation to local aligns to the idea that **consumers are considering the location as key factor** during their purchase.

Local is the new correlations with takeaway, possibly a new behavioural trend due to the situation.

Source: Internal Data, Core O&O + Core O&O Rest, All Device



Thank you!!