OCTOBER, 2017

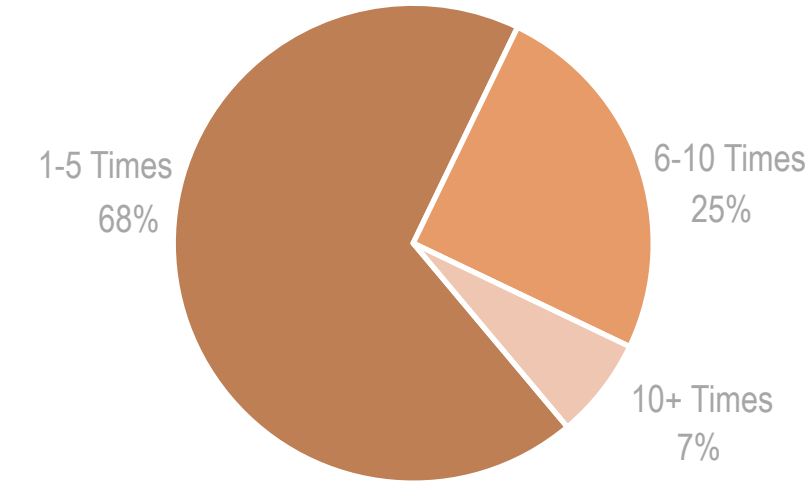
FOOD ON DEMAND

See LevelL
Human Experience®

DIRECTIONS RESEARCH

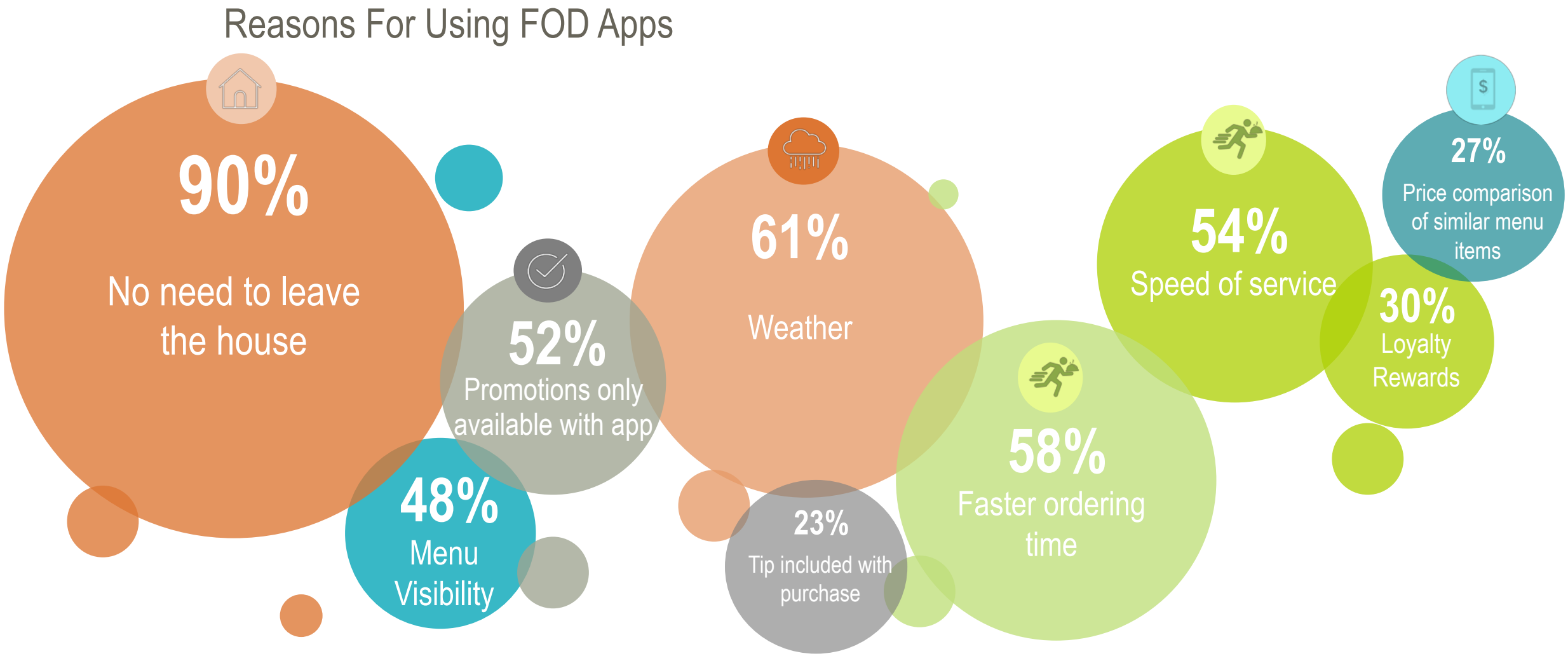
FOD app users order 1-5 times/month

NUMBER OF TIMES FOD APP USED PER MONTH



Base: Total (n=1781)
Q1 In an average month, approximately how many times do you use a Food On Demand app?

Convenience of being at home is the #1 reason for using FOD apps.



Base: Total (n=1781)
Q3 Please select all the reasons why you EVER have chosen to use a Food On Demand app.

Consumers understand restaurant and delivery service roles except when it comes to food temperature.

Consumers are divided as to where this responsibility lies.

Who Is Responsible When Issues Arise

Restaurant At Fault

Food Packaged Poorly — 91%

Poor Presentation Of Food — 86%

Order Was Inaccurate — 82%

Delivery Service At Fault

Poor Service From Delivery Driver — 85%

Delivery Not Within Estimated Time — 69%

Consumers Divided

Food Temperature Was Not Correct — 38% / 46%

Base: Total (n=1781)

Q5 If one of the following issues occurred when using a Food On Demand app, who do you feel is primarily responsible?

Variety and quick arrival drive app selection

MOST IMPORTANT REASONS FOR SELECTING FOD APP

(% VERY IMPORTANT)

71% Type Of Food Offered

69% Ease Of Using The App

68% Restaurants Included

62% How Quickly Food Can Arrive

46% Delivery fee or not

39% Previous experience with a specific app

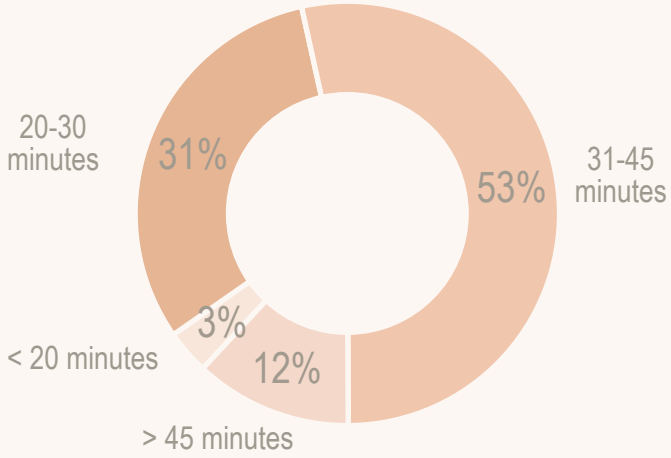
23% Whether tip is included when paying via the app

Base: Total (n=1781)

Q4 When selecting a Food On Demand app to use, how important is each of the following to you? 5-Very Important, 1-Not At All Important

WHAT WOULD CONSUMERS DO….

84% Willing to wait 20-45 minutes for delivery



Base: Total (n=1781)
Q6 How likely are you to try a new restaurant – one that you may not have heard of or visited in the past – while using a Food On Demand app?
Q7 If the estimated delivery time was too long, would you be more likely to change the restaurant that you're ordering from, or the Food On Demand app?
Q8 How long are you generally willing to wait for food to be delivered?

GrubHub and UberEats are clearly consumers' top choices.

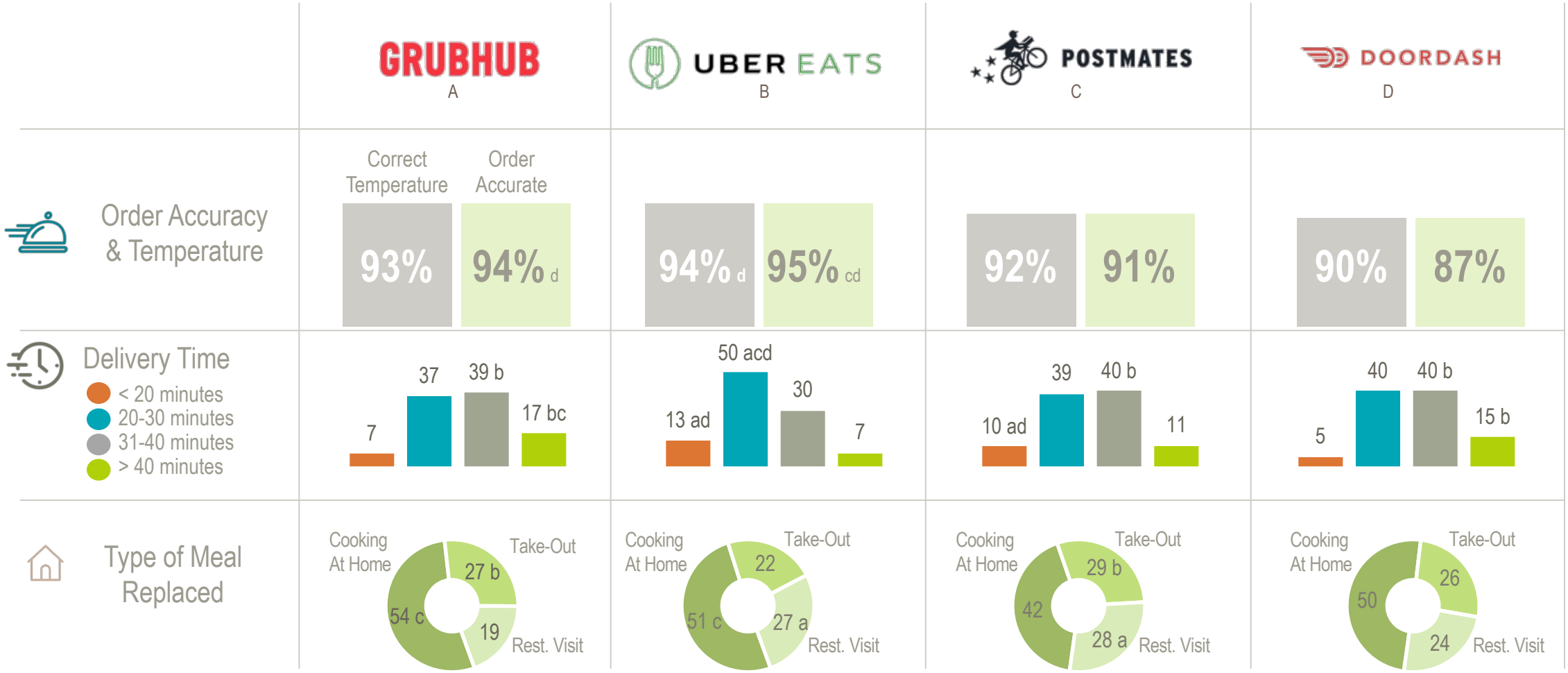
% USED ON LAST OCCASION

	GRUBHUB	UBER EATS	POSTMATES	DOORDASH	yelp EAT24	amazon
	34%	30%	9%	8%	5%	4%
Reasons App Was Chosen						
Offered Specific Restaurant I Wanted	24% B	20%	22%	34% ABC		
Easy To Use	23% D	21% D	20%	14%		
Offered Food I Wanted	17% B	13%	13%	13%		
Variety Of Their Menu Offerings	14% BD	10%	14%	8%		
Delivery Fee Was Acceptable	2%	7% A	11% AB	9% A		
	A	B	C	D		

Base: Total (n=1781) Q9 Which app did you use the last time you ordered Food On Demand?
Base Per App: (n=143-610) Q10. What was the main reason why you decided to use [INSERT RESPONSE FROM Q9]?
A letter next to a number indicates a significant difference at the 90% confidence level

All other Apps used on last occasion are 2% or less
Yelp Eat24 and Amazon not reported due to smaller base

Regardless of app used, food arrives hot, the order is accurate, delivery occurs within 20-40 minutes and occasions most commonly replace at home meals.

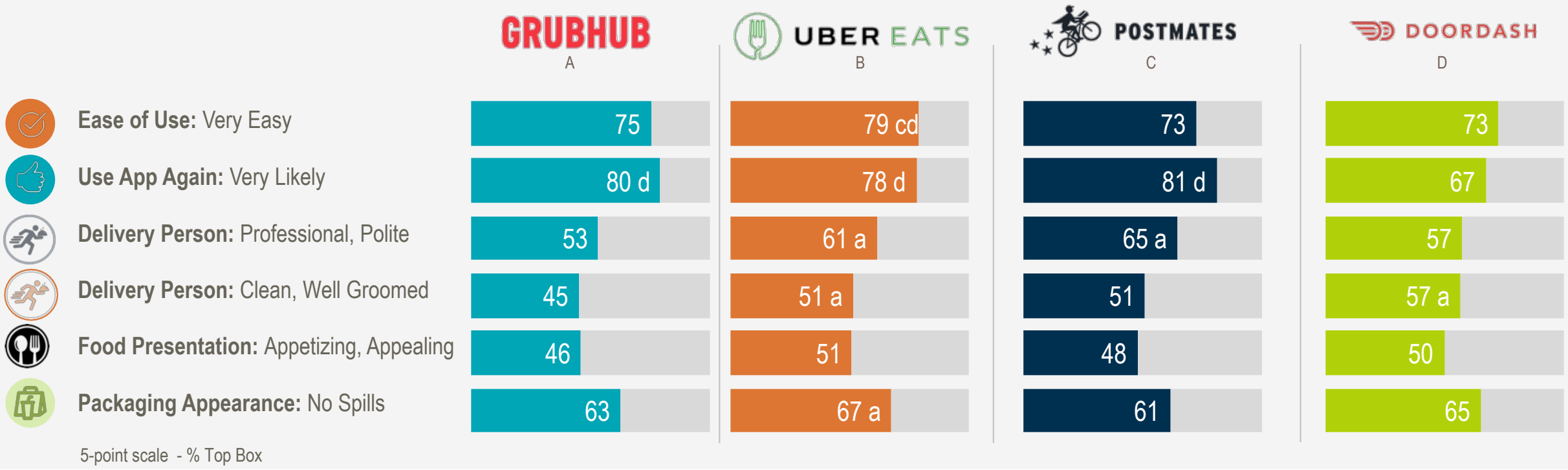


Base Per App: (n=143-610)

Q12. When you placed this most recent order, did it replace visiting a restaurant in person, cooking at home, or ordering take-out from a restaurant? Q13. Approximately how long did it take for your food to arrive after placing the order? Q18. Was your food at the correct temperature (hot food was hot, cold food was cold)? Q19. Was the order accurate, including all requested sides and condiments? A letter next to a number indicates a significant difference at the 90% confidence level

FOD apps are easy to use netting solid repeat intentions.

UberEats leads GrubHub on delivery driver performance and food packaging.



Base Per App: (n=143-610) Q11. Overall, how easy was it to use? Q14. Thinking about the most recent order using [INSERT RESPONSE FROM Q9] - on a scale of 1-5, how would you rate the customer service of the delivery person? Q15.On a scale of 1-5, how would you rate the appearance of the delivery person? 16. How would you rate the presentation of the food? 17. Rate how well the food/meal was packaged with regards to appearance? Q21. How likely would you be to use [INSERT RESPONSE FROM Q9] again?
A letter next to a number indicates a significant difference at the 90% confidence level

Positive FOD app interactions have potential to add in-person visits and restaurant recommendations.

63%

are using FOD apps more and **more frequently**

47%

likely **to visit restaurant in-person** after positive FOD experience

68%

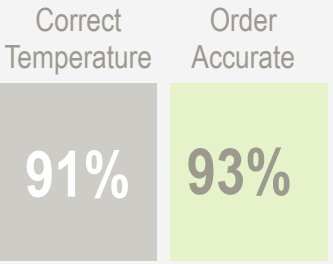
would **recommend a restaurant** after a positive experience through FOD app

Base: Total (n=1781) Q23 Since you first starting using any Food On Demand apps, how would you describe the frequency of your usage? Q24 How does that experience impact your likelihood to visit a restaurant a restaurant in person? Q25 How likely would you be to recommend a restaurant to someone based on a positive dining experience that you had when ordering the restaurant's food through a Food On Demand app?

[APPENDIX]

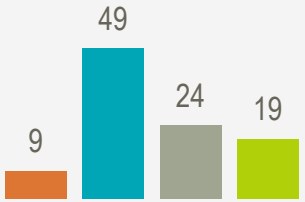
Amazon FOD consumer experience is positive.

Order Accuracy & Temperature

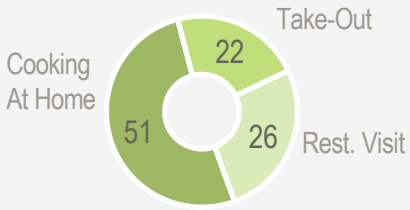


Delivery Time

- < 20 minutes
- 20-30 minutes
- 31-40 minutes
- > 40 minutes



Type of Meal Replaced



5-point scale - % Top Box

Base Per App: (n=68) Q11. Overall, how easy was it to use? Q14. Thinking about the most recent order using [INSERT RESPONSE FROM Q9] - on a scale of 1-5, how would you rate the customer service of the delivery person? Q15.On a scale of 1-5, how would you rate the appearance of the delivery person? 16. How would you rate the presentation of the food? 17. Rate how well the food/meal was packaged with regards to appearance? Q21. How likely would you be to use [INSERT RESPONSE FROM Q9] again? Q12. When you placed this most recent order, did it replace visiting a restaurant in person, cooking at home, or ordering take-out from a restaurant? Q13. Approximately how long did it take for your food to arrive after placing the order? Q18. Was your food at the correct temperature (hot food was hot, cold food was cold)? Q19. Was the order accurate, including all requested sides and condiments?

Yelp Eat24 FOD users also have a positive experience.

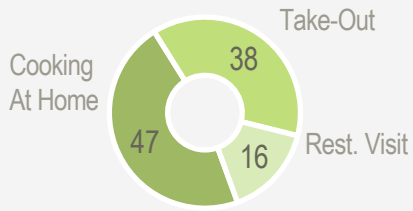
Order Accuracy & Temperature

Correct Temperature	Order Accurate
99%	93%

Delivery Time

- < 20 minutes: 10
- 20-30 minutes: 32
- 31-40 minutes: 48
- > 40 minutes: 10

Type of Meal Replaced



Ease of Use: Very Easy — 76

Use App Again: Very Likely — 83

Delivery Person: Professional, Polite — 68

Delivery Person: Clean, Well Groomed — 50

Food Presentation: Appetizing, Appealing — 50

Packaging Appearance: No Spills — 67

5-point scale - % Top Box

Base Per App: (n=90) Q11. Overall, how easy was it to use? Q14. Thinking about the most recent order using [INSERT RESPONSE FROM Q9] - on a scale of 1-5, how would you rate the customer service of the delivery person? Q15.On a scale of 1-5, how would you rate the appearance of the delivery person? 16. How would you rate the presentation of the food? 17. Rate how well the food/meal was packaged with regards to appearance? Q21. How likely would you be to use [INSERT RESPONSE FROM Q9] again? Q12. When you placed this most recent order, did it replace visiting a restaurant in person, cooking at home, or ordering take-out from a restaurant? Q13. Approximately how long did it take for your food to arrive after placing the order? Q18. Was your food at the correct temperature (hot food was hot, cold food was cold)? Q19. Was the order accurate, including all requested sides and condiments?