FOOD ON DEMAND:

THE BATTLE FOR THE CONSUMER

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See LeveL
Human Experience℠

OVERVIEW

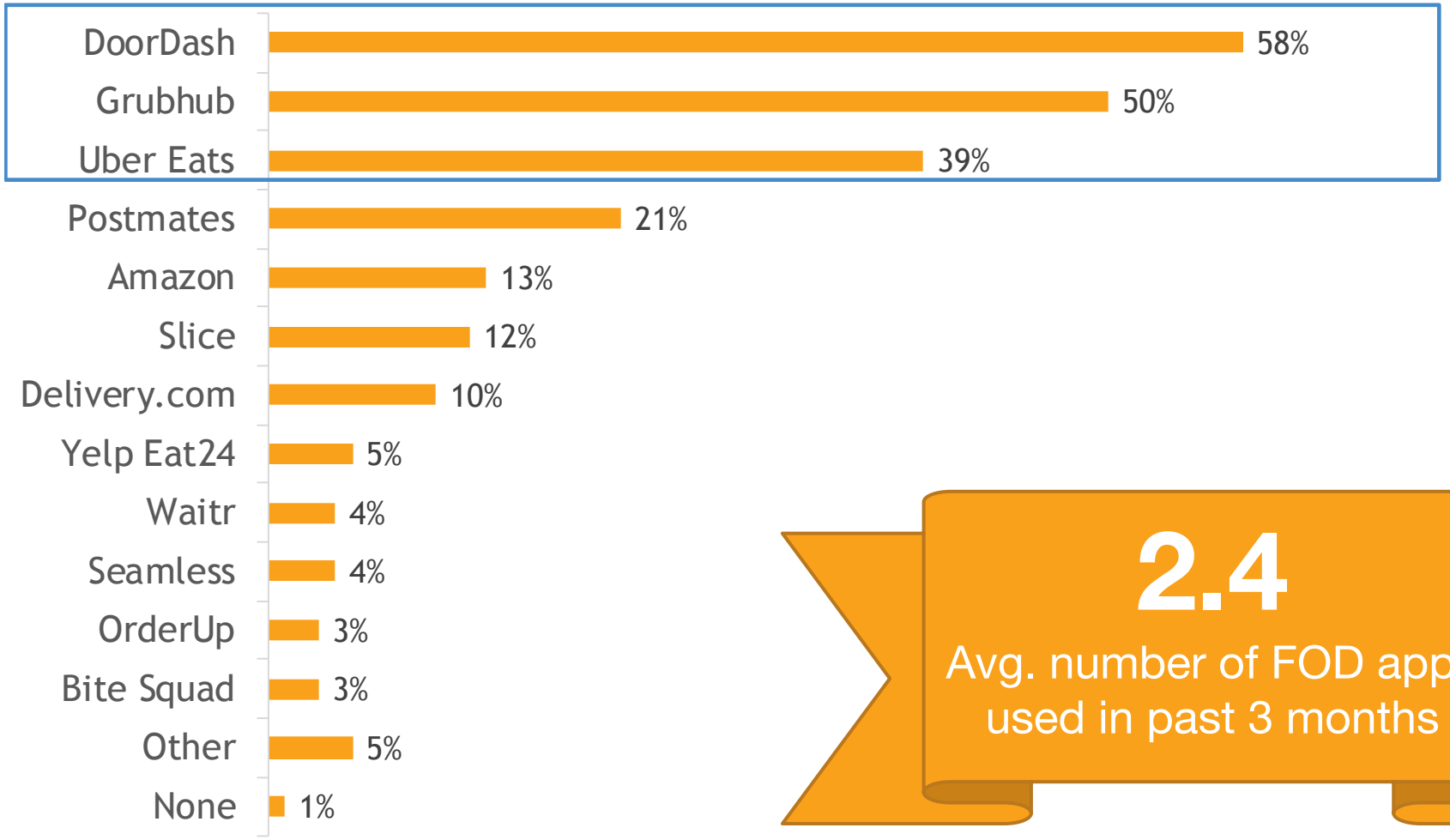
- Consumer Study
  - 694 surveys from our panel
  - North America
  - Has ordered from an FOD app in the past month
- Mystery Shops
  - 50 Bite Squad / 49 Uber Eats / 51 Door Dash
  - Primary Market - Minneapolis
  - Secondary Market - Moline

CUSTOMER SURVEYS

SeeLevel HX | April 2019

TO THE VICTOR GOES THE WALLET

With results showing an average of 2.4 apps used, FOD apps need to seize consumer loyalty from the first visit!



2.4

Avg. number of FOD apps used in past 3 months

Base: Total Shoppers (694)
*Only listed Responses with 3%+ mentions
1. Which of the following FOD apps have you used in the past 3 months?

DRIVERS SHOW NO DIFFERENTIATION IN FIGHT

Those surveyed cared the least about previous experience when selecting a FOD app. That means those surveyed see little to no difference in your service!

PROMOTIONS/COUPONS

67%
IN 2019

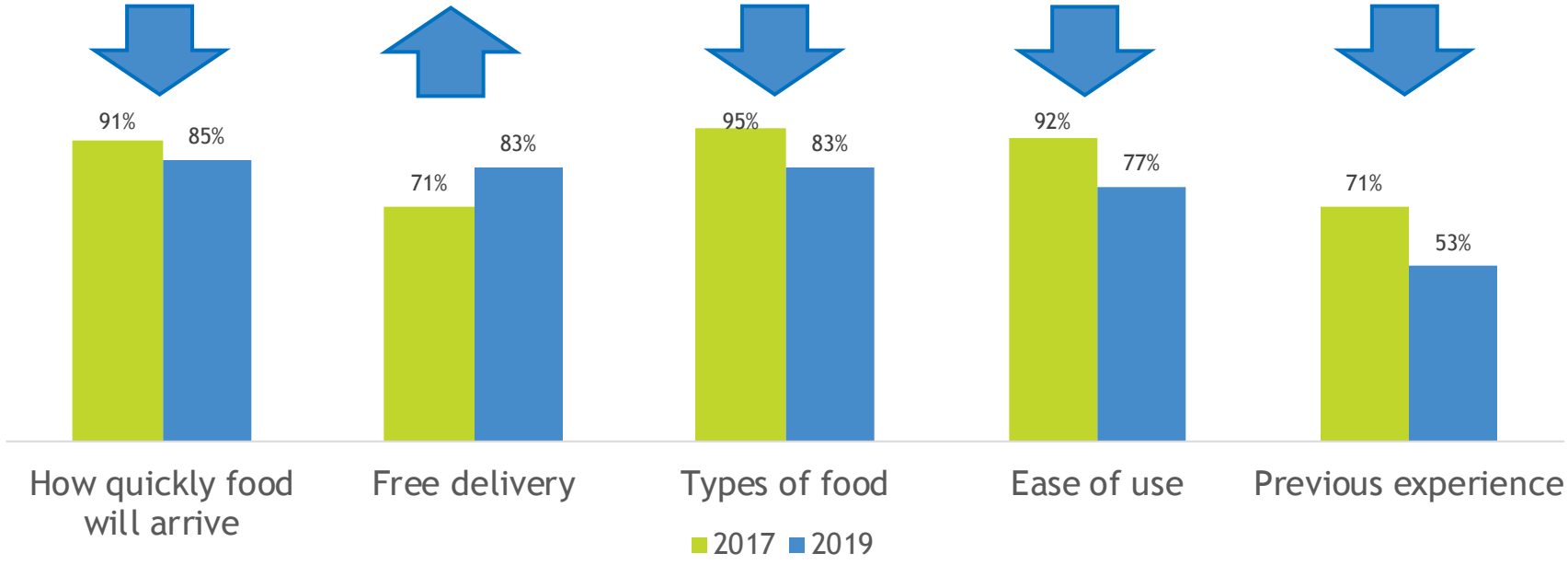
SPECIFIC RESTAURANT

88%
IN 2019

DELIVERY FEE

89%
IN 2019

2017 VS. 2019 COMPARISONS

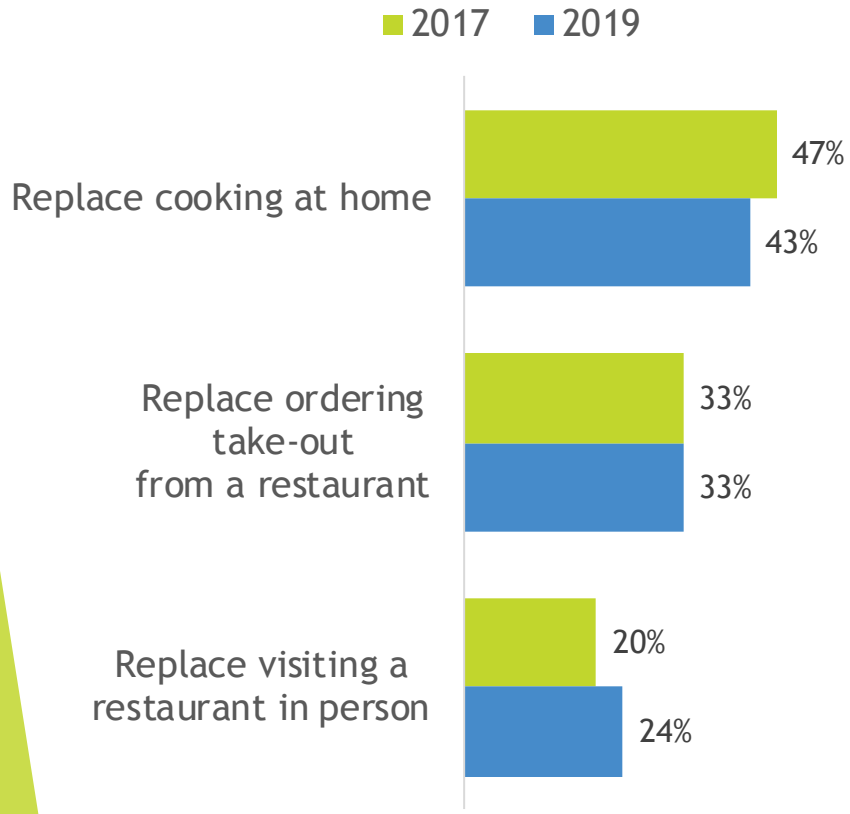


Base: Total Shoppers (694) | Rated 4=Important, or 5 Very Important
2. When selecting a Food On Demand app to use, how important is each of the following to you? Use a scale of 1 = Not Important and 5 = Very Important

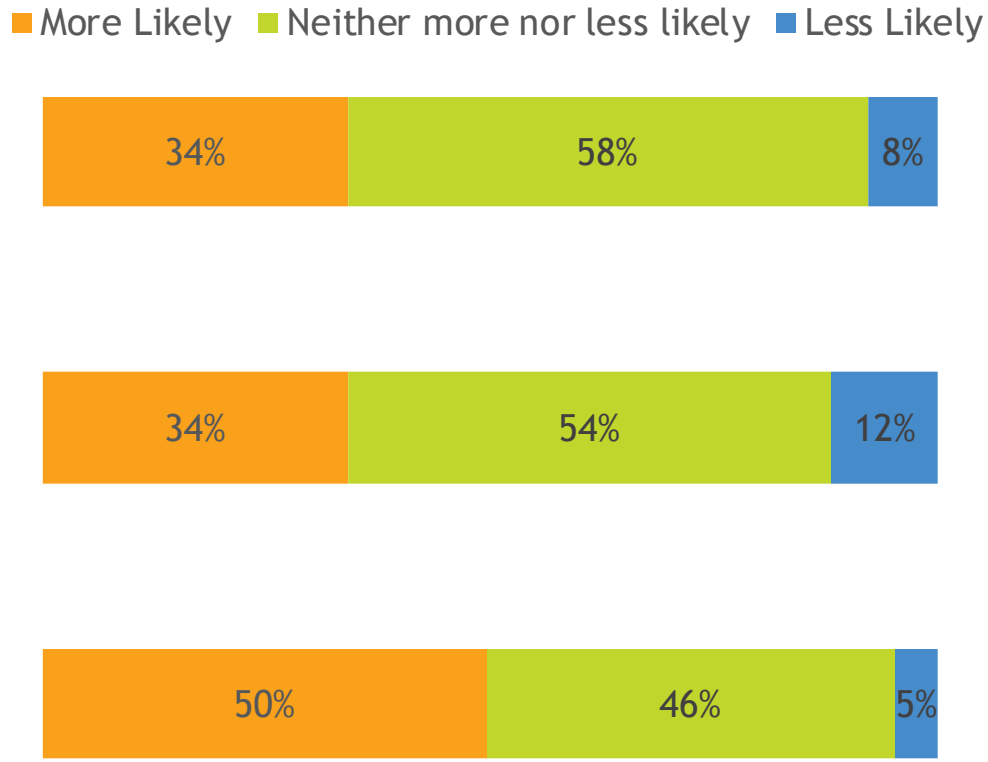
TO CONQUER YOU MUST UNDERSTAND

As we all know, social media has changed behaviors. Consumers are more focused on solitude, even during meals.

CURRENT REASON TO USE FOD APP



FUTURE REASON TO USE FOD APP



Base: Total Shoppers (694)

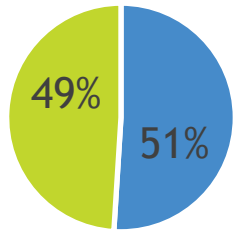
7. Generally speaking, do you use a Food On Demand app to replace visiting a restaurant in person, cooking at home, or ordering a take-out meal?

BATTLE STRATEGY: RESTAURANT PARTNERSHIP

Half of the consumers have had a negative experience and blame the restaurant more than the FOD app. But at same time, restaurants are the main reason those surveyed chose their FOD app.

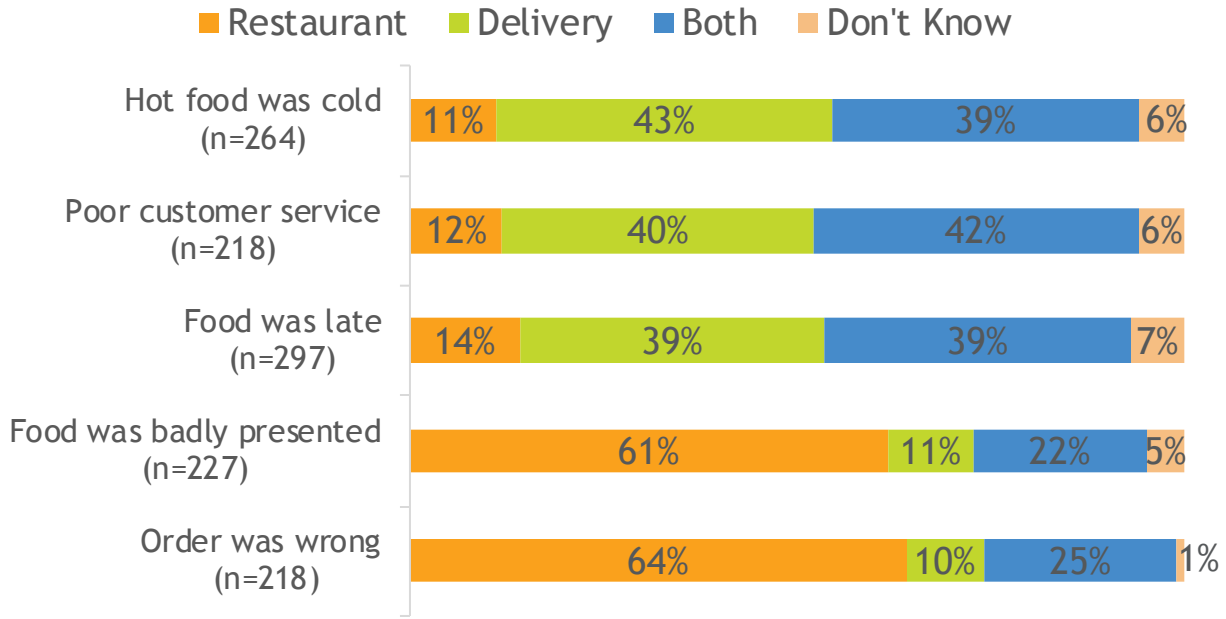
What can restaurants do to help FOD apps help them?

HAS HAD A NEGATIVE EXPERIENCE



Base: Total Shoppers (694)

RESPONSIBLE FOR NEGATIVE EXPERIENCE



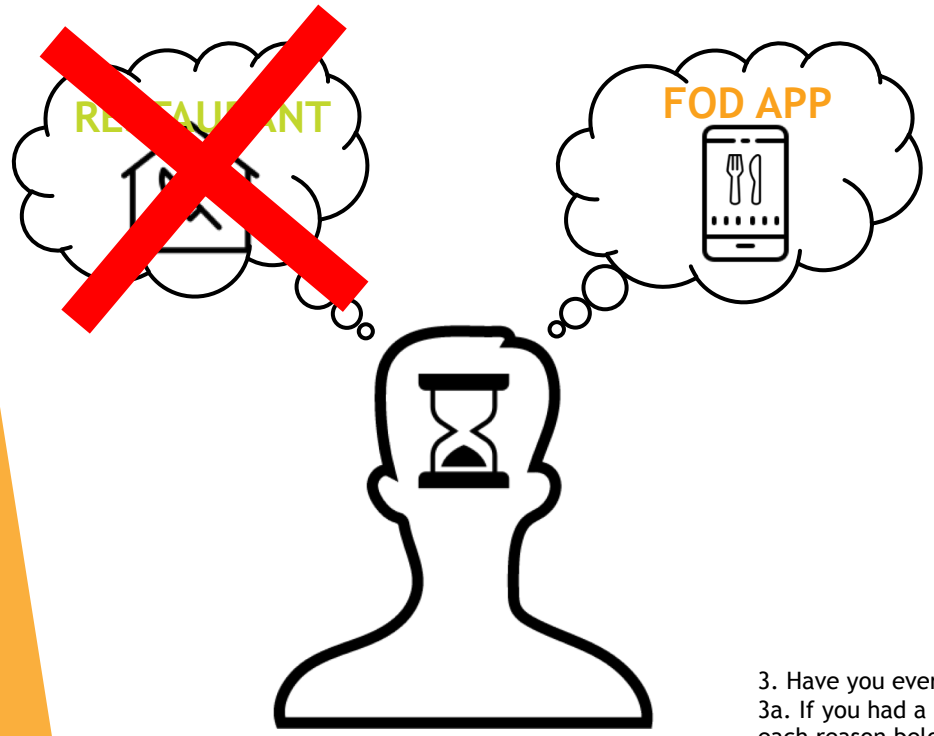
3. Have you ever had a negative experience with a Food On Demand App?
3a. If you had a negative experience with one of the following, who would you feel is primarily responsible? (pick one for each reason below)

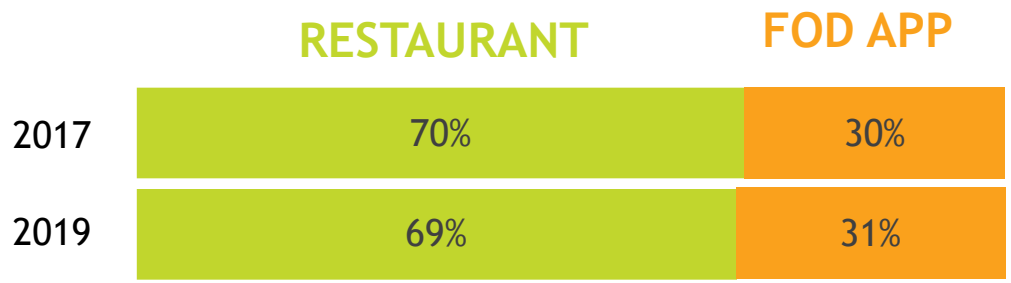
SNEAK ATTACK ON DELIVERY TIMES

Restaurants get the customer in the app, but once there, those surveyed were less likely to switch apps.
If there was a long estimated delivery time, most would change restaurants, not apps.

RESTAURANTS:

Choose the apps you go to battle with wisely!
They become an extension of your brand,
and impact your wallet.





3. Have you ever had a negative experience with a Food On Demand App?
3a. If you had a negative experience with one of the following, who would you feel is primarily responsible? (pick one for each reason below)
5. If the estimated delivery time was too long, would you be more likely to change the restaurant that you are ordering from or the app you are using to place the order?

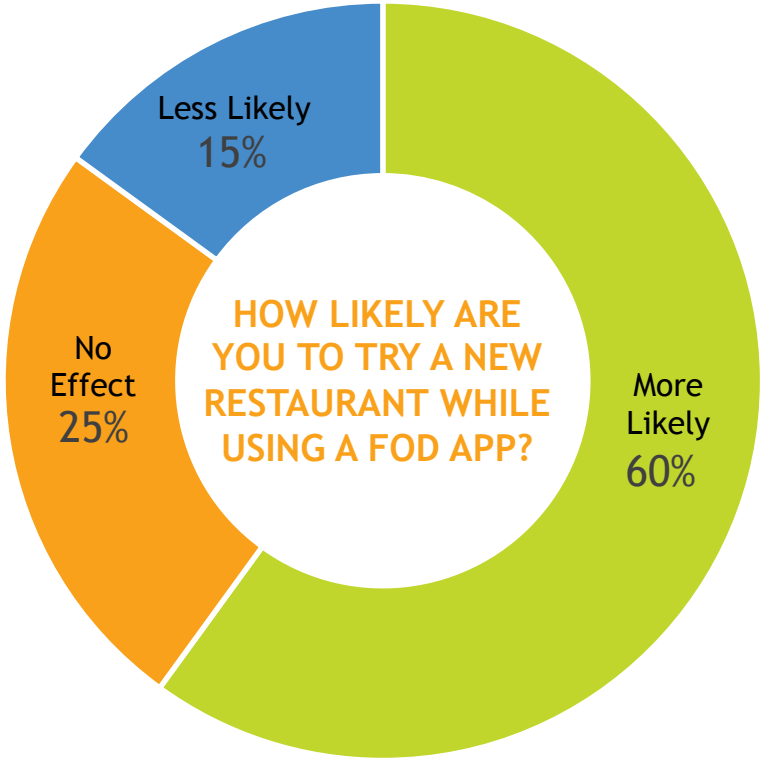
RESTAURANTS DUKE IT OUT FOR FIRST PLACE

Those surveyed overwhelmingly came to the app because of the restaurant. But we also know if delivery time is longer, they will more than likely stay with your app and try something new!

WOULD YOU BE MORE LIKELY TO KNOW THE SPECIFIC RESTARURANT YOU WANT TO ORDER FROM, OR JUST A GENERAL IDEA OF THE TYPE OF CUISINE?

WHEN YOU DECIDE TO PLACE AN ORDER VIA A FOD APP, WHICH DO YOU DECIDE FIRST?

HOW LIKELY ARE YOU TO TRY A NEW RESTAURANT WHILE USING A FOD APP?

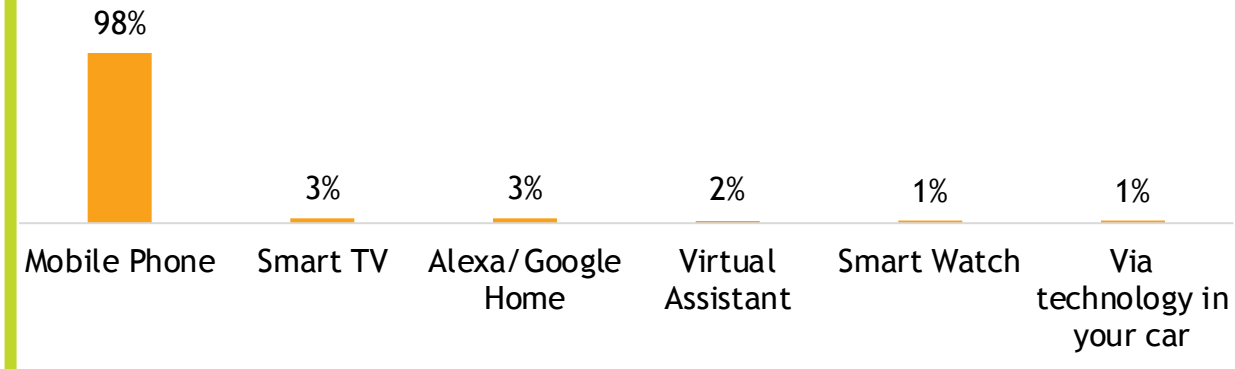


Base: Total Shoppers (694)
12. When you decide to place an order via FOD app, which do you usually decide first?
13. Would you be more likely to know the specific restaurant you want to order from, or just a general idea of the type of cuisine?
4. How likely are you to try a new restaurant or one that you many not have heard of or visited in the past using a Food On Demand app?

IMPLEMENTS OF WAR

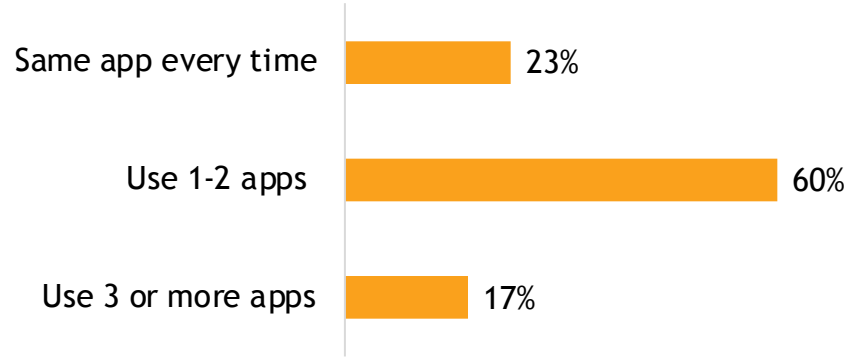
Mobile phone apps are the main weapons for now. But keep your sights on the integration of emerging technologies – particularly virtual assistants.

DEVICE USED TO USE FOD APP



Base: Total Shoppers (694)
6. What devices have you used to place an order?
11. Do you tend to use the same app to place orders?

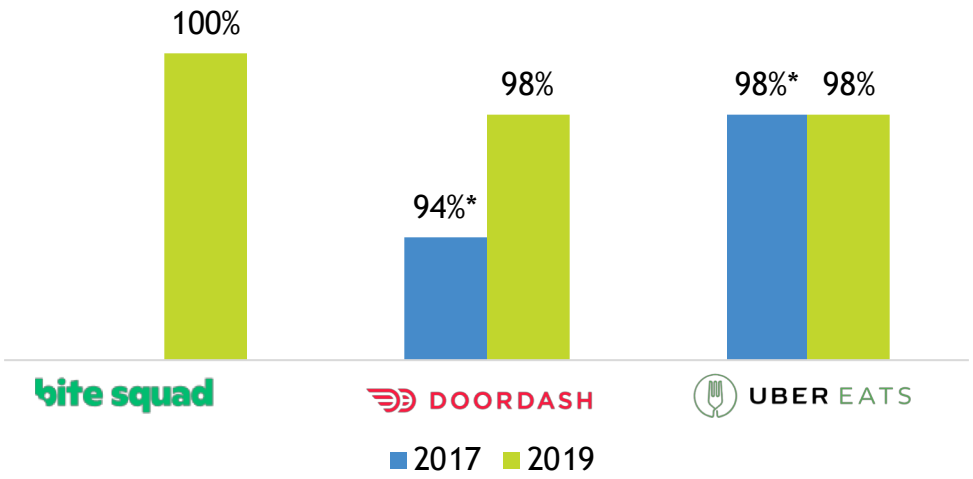
NUMBER OF APPS TENDED TO USE



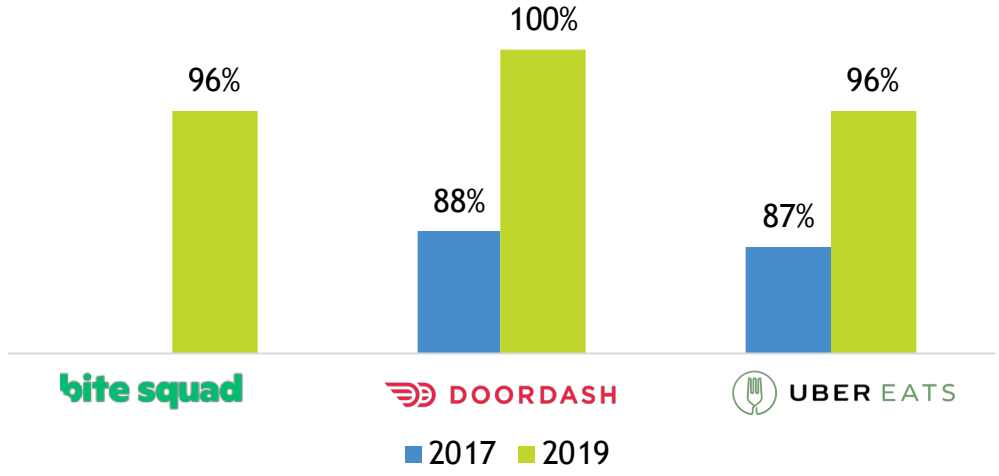
USABILITY: WINNING BATTLES

Ease of use and likely to use are winning, but stay on your guard! We all know your apps must be improved constantly if you want a fighting chance in the future!

APP IS EASY TO USE



WOULD USE APP AGAIN

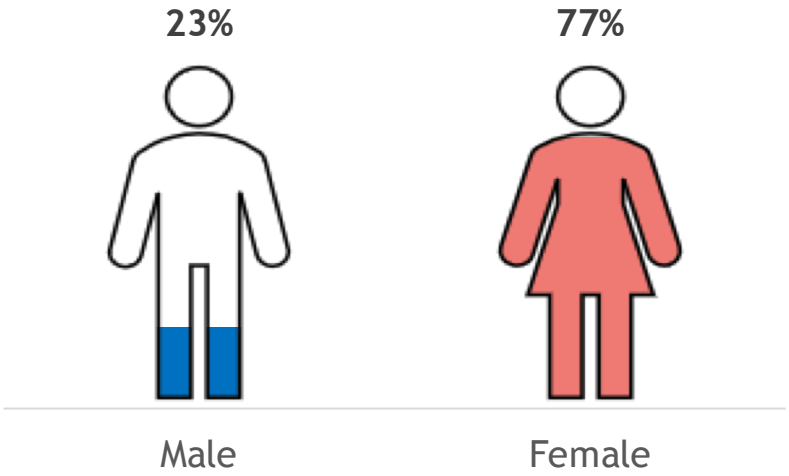


*2017 Question based of 5 point scale
Base: Total Shoppers: (Bite Squad n=50/DoorDash n=51/Uber Eats n=49)
18. Was the app easy to use?
19. Would you use this app again?

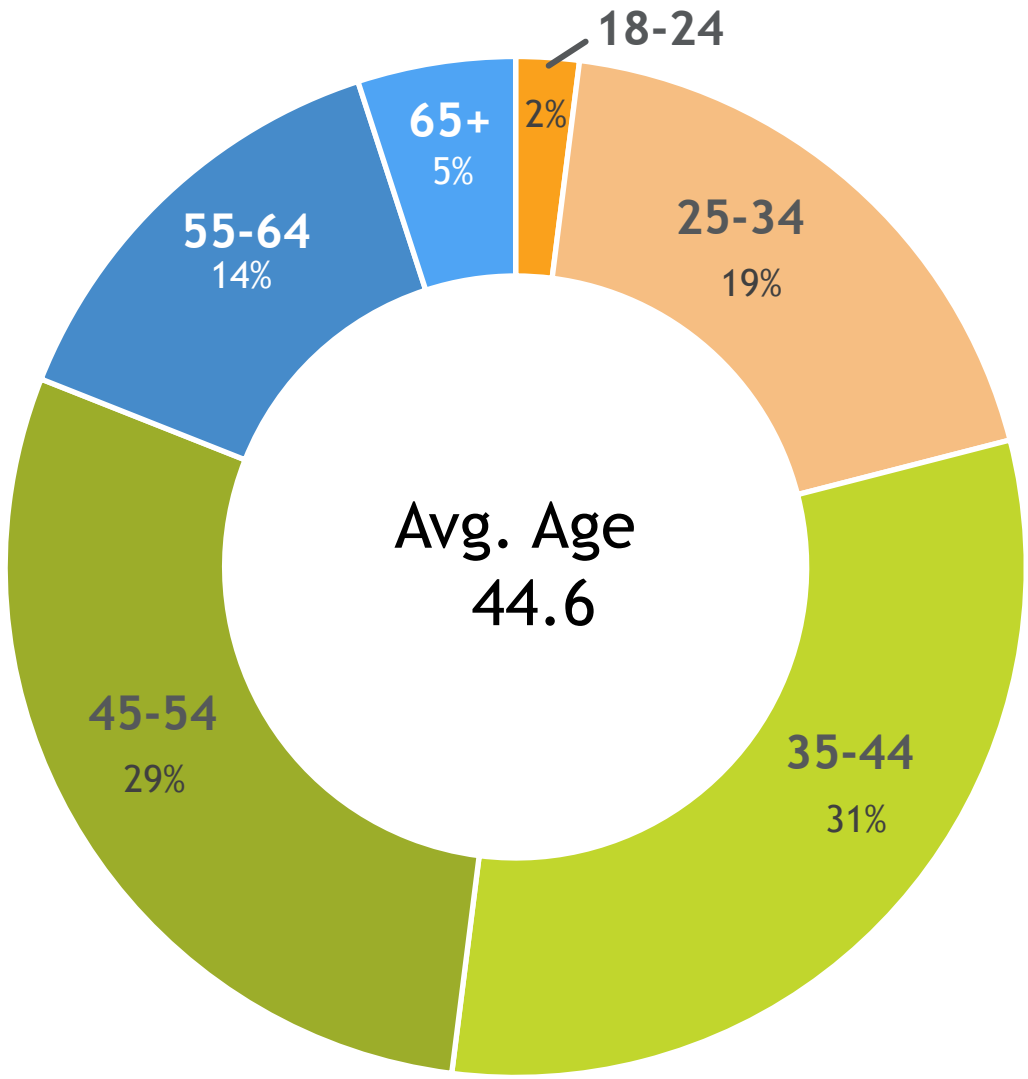
ROLL WITH THE PUNCHES ON WHAT WOMEN WANT

Who is your target audience, and are you marketing to them? We know women look for customer service, but are you delivering?

GENDER

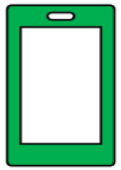


AGE



USED APP ON PHONE WITHIN THE LAST MONTH

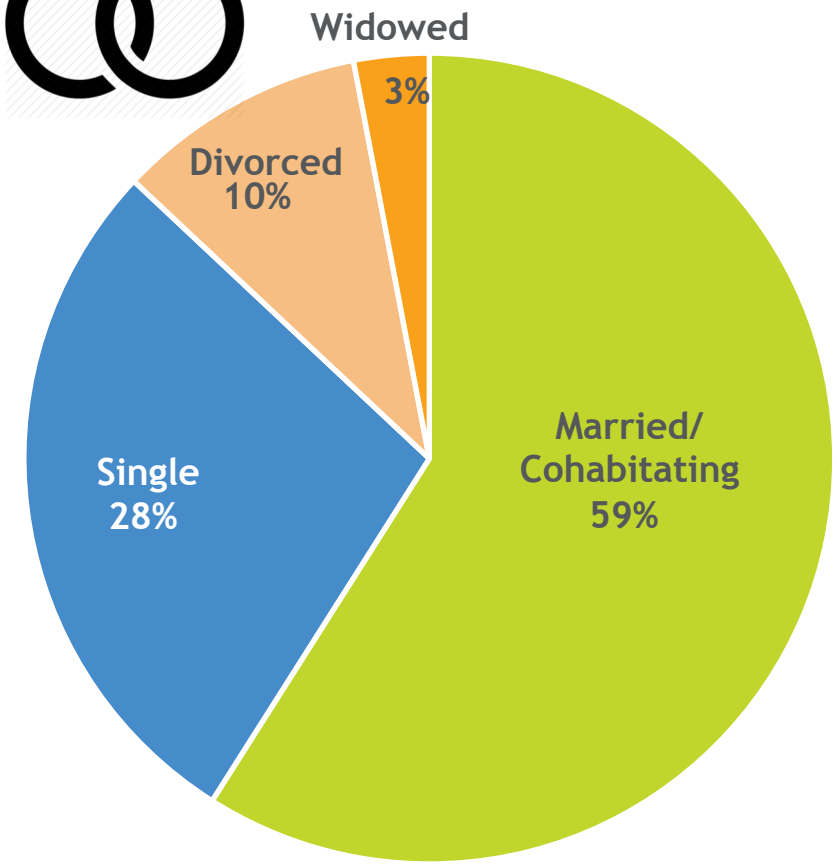
99%



THE AGE-OLD BATTLE: WHO'S MAKING DINNER?

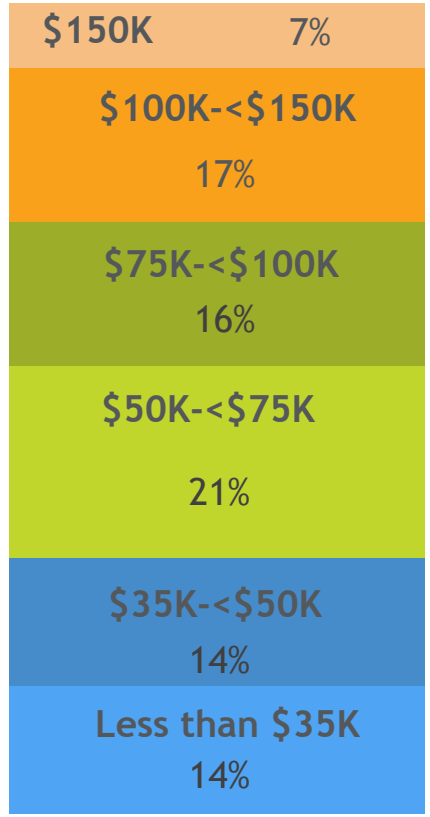
Food on demand is winning and proves there is really an app for everything! But are you fighting your way to the top and separating yourself from the competition with the right marketing strategy?

MARITAL STATUS



Avg HH with Children: 48%
Avg Children in HH: 1.9

INCOME



Avg. Income: $90.1K

MYSTERY SHOP SURVEYS

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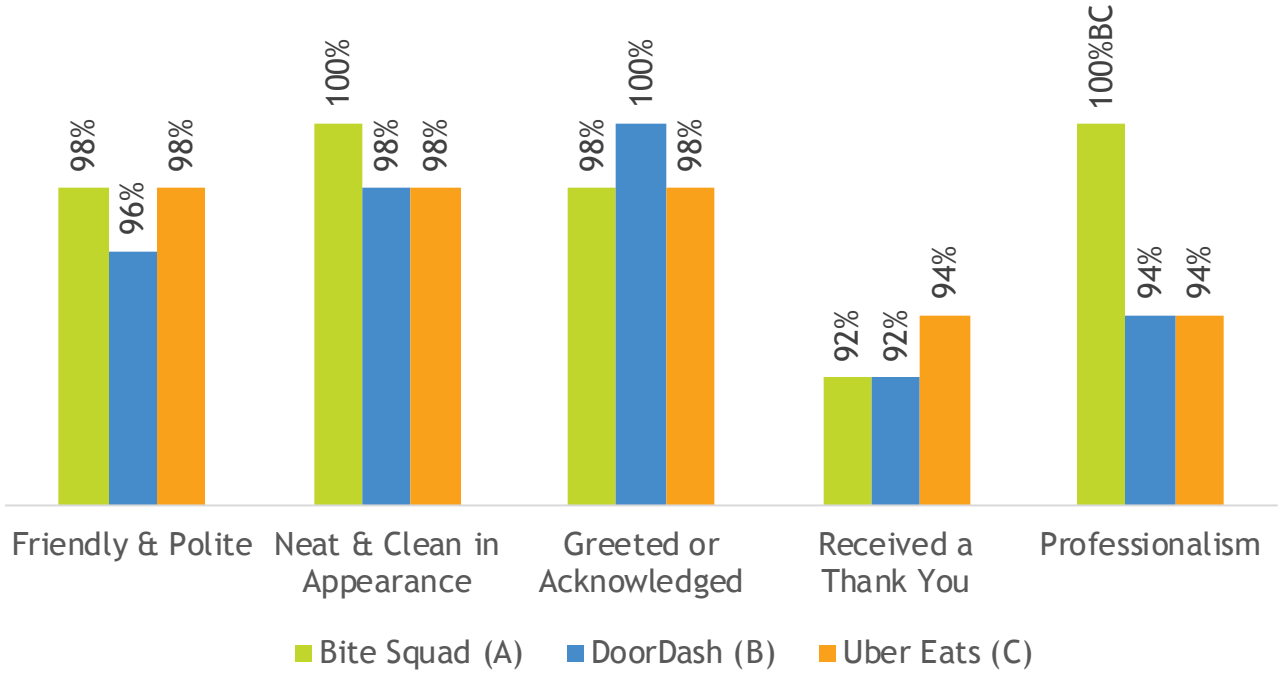
COURIERS: YOUR FOOT SOLDIERS

Couriers deliver the only face-to-face customer service experience, so they must march to your brand's beat!
Saying "thank you," professionalism and cleanliness of car offer strong opportunities for FOD apps to stand out from the rest.



CLEANLINESS OF CAR

100% bite squad

97% DOORDASH

87% UBER EATS

Base size (total shoppers who saw car): Regarding car cleanliness, Bite Squad n=9/ DoorDash n=29/Uber Eats n=15)
Base size (all other questions): Bite Squad n=50/DoorDash n=51/Uber Eats n=49)
Letters indicate significantly difference between categories at 90%
12. Was the driver friendly and polite?
13. Was the driver neat and clean in appearance?
14. Did the driver greet or acknowledge you?
15. Did the driver thank you?
17.. Was the overall delivery professional?
16. Was the car clean?

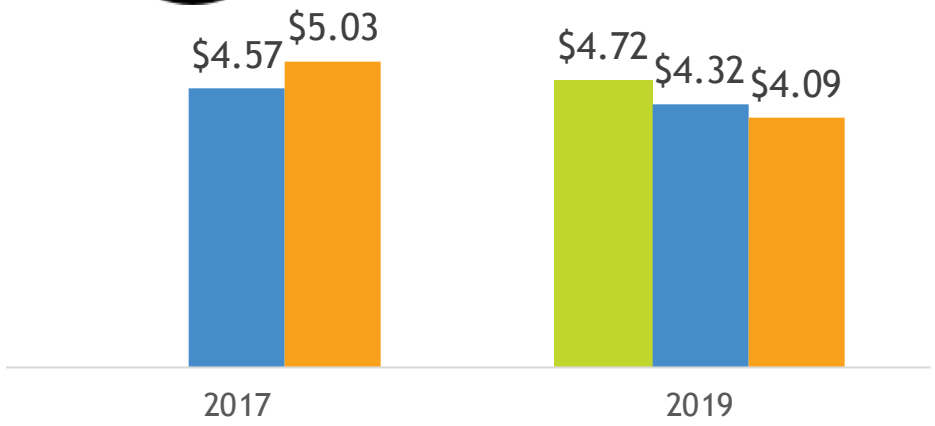
RESTAURANTS:

Which FOD apps do you want in your corner?

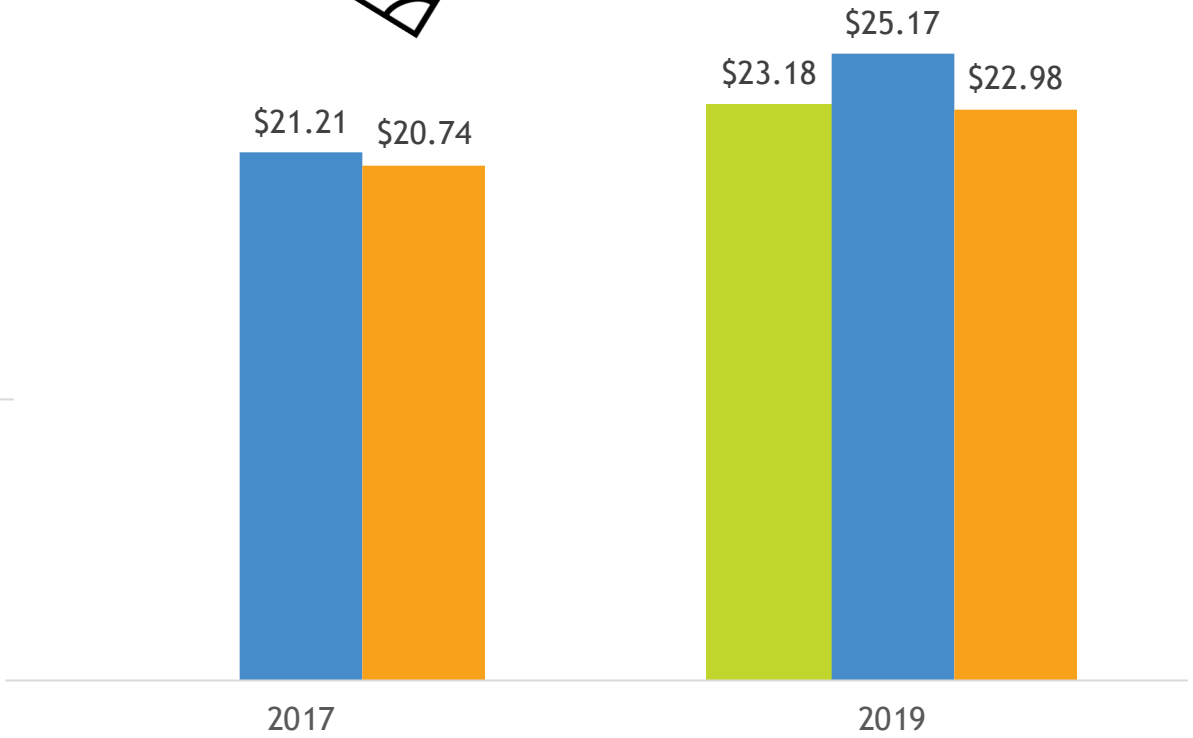
WINNING THE CUSTOMER LOYALTY WAR

Remember the key drivers to choosing an FOD app? Survey results show fees is most important factor in winning the war to gaining customer loyalty!

TOTAL FEES (DELIVERY AND/OR SERVICE FEES)



TOTAL COSTS

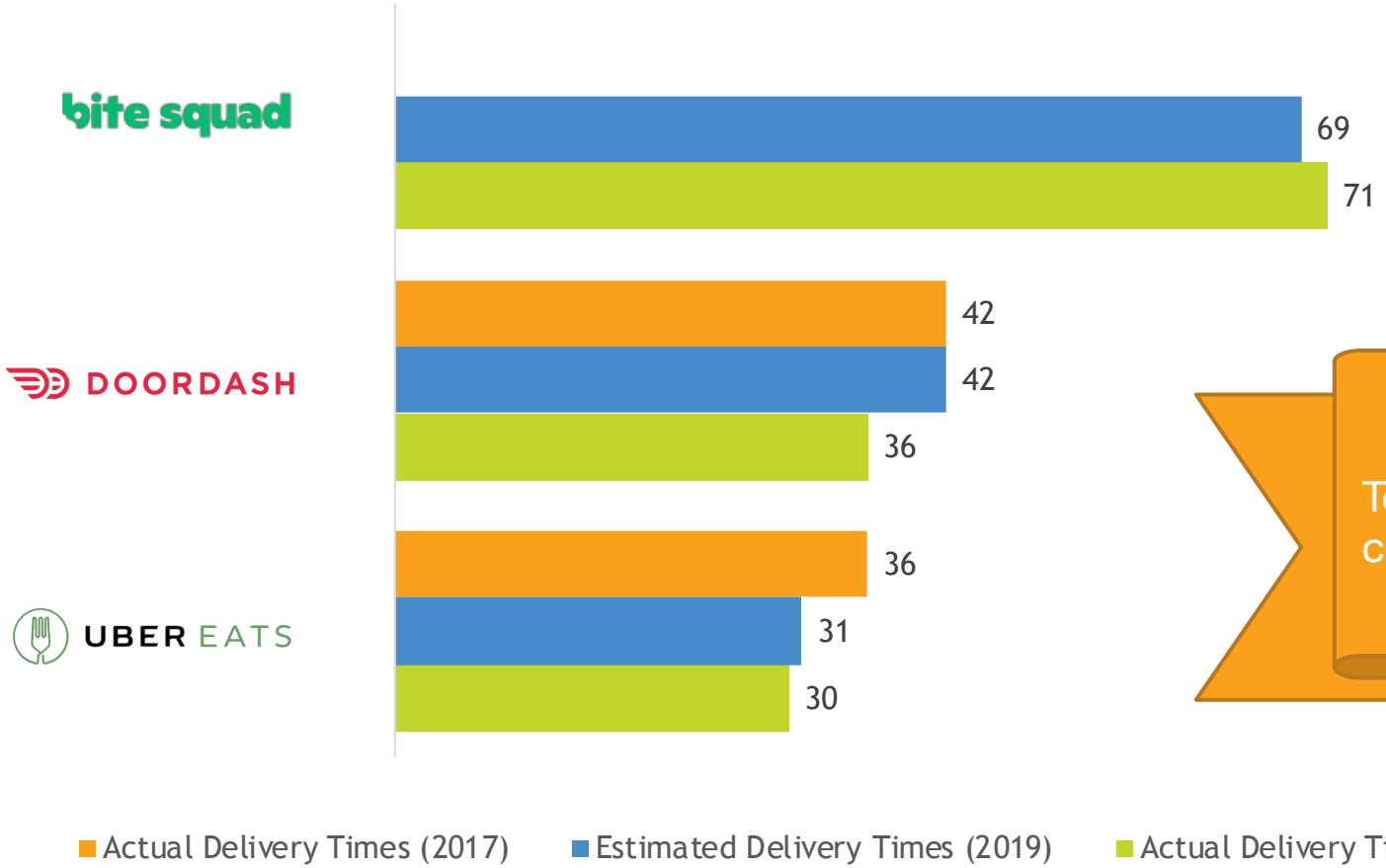


- Bite Squad
- DoorDash
- Uber Eats

Letters indicate significantly difference between categories at 90%
Base size for Average Fee: Shoppers that had a fee (Bite Squad n=46/DoorDash n=51/Uber Eats n=44)
5. How much was the delivery fee? Base Size: Shoppers with a delivery fee (Bite Squad n=29/DoorDash n=34/Uber Eats n=29)
6. How much was the service fee? Base Size: Shoppers with a service fee (Bite Squad n=34/DoorDash n=51/Uber Eats n=15)
20. Total purchase amount including delivery and including tip. Base size: Total Shoppers: (Bite Squad n=50/DoorDash n=51/Uber Eats n=49)

DELIVERY TIMES: IMPORTANT VICTORIES

Delivery time is not everything to those surveyed, based on the key drivers. Is that because there is a perception that all apps are the same? How long is too long?



FOD APPS:

To avoid picking fights with consumers, deliver on your timing estimates.

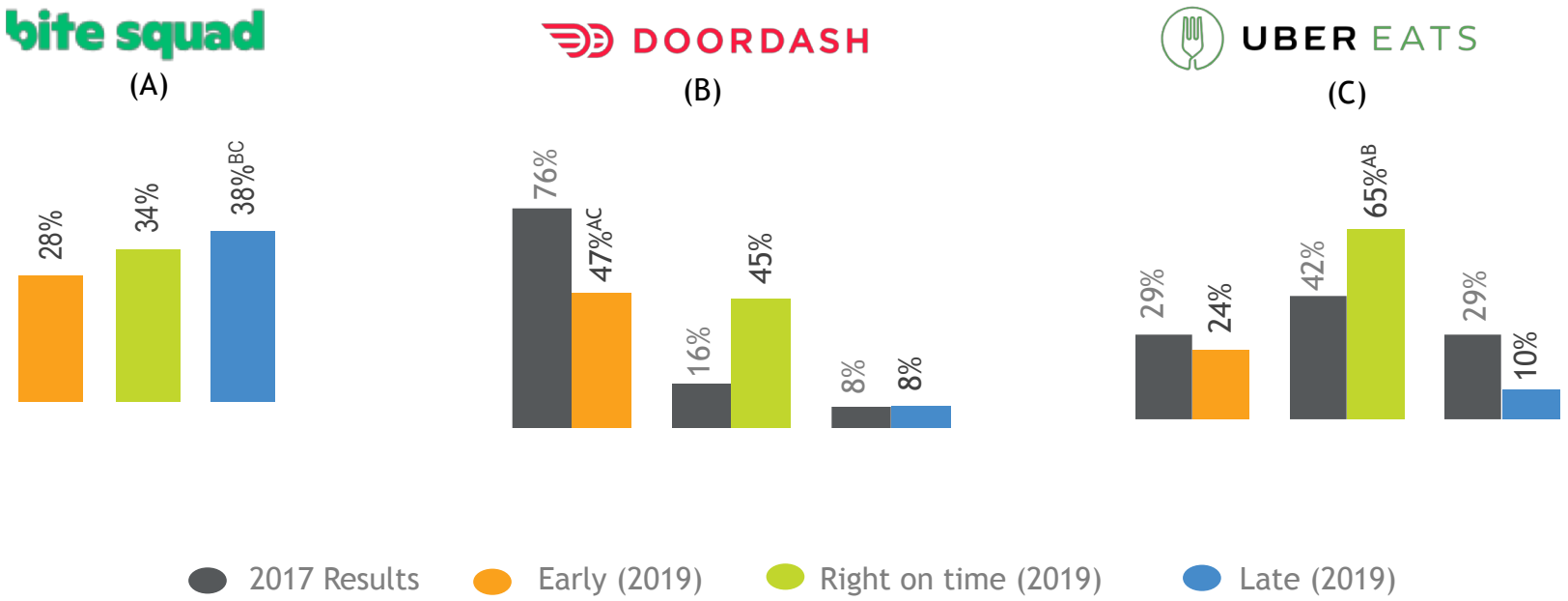
*2017 Results were self reported
Letters indicate significantly difference between categories at 90%
Base: Total Shoppers: (Bite Squad n=50/DoorDash n=51/Uber Eats n=49)
2. What was the original projected time to receive your meal?

1. What time did you place your order?
3. What time did you receive your meal?

DELIVERY TIMES: FIGHT TO THE FINISH

Is it more important to offer faster delivery times or to beat your estimated delivery times?

WHEN THE FOOD ARRIVED (WITHIN 5 MINS. ETD)



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READY TO CALL THE SHOTS?

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