BACKGROUND:

- Survey of quantitatively significant N's who are currently regular/occasional customers of meal kits providers, grocery delivery providers, and food delivery providers.

- ***Companies Studied:***
  - Hello Fresh, Instacart, DoorDash, Shipt, Uber Eats, Blue Apron, Sunbasket, Home Chef, Amazon Fresh, Purple Carrot.

FINDINGS:

When Did They Start Engaging – PRE / DURING Pandemic
- Across the meal kits, grocery delivery, and food delivery apps surveyed a range of customers (between 37.4% for Blue Apron at the lower end and 57.7% at the higher end for Shipt) started using each respective platform for the first time DURING the pandemic.

Usage Frequency – Positive Recently and Projected To Continue
- Usage frequency feedback was constructive/positive for most platforms tested. The general trend is that the majority of those who used each platform frequently/very frequently over the past 6 months expect to continue doing so for the next year going forward. Newer "During Pandemic" meal kits users were relatively more likely to continue using the platforms frequently going forward compared to those who started using food delivery and grocery delivery platforms during the pandemic.

CSAT – Net Positive For Meal Kits / Grocery Delivery / Food Delivery Platforms
- Consumers have a net favorable opinion of most platforms when it comes to quality of the product, service/delivery times, variety/selection, etc. We would note that on the meal kits front Hello Fresh received positive customer sat scores relative to competitors, that Instacart was typically just a step ahead of Shipt, that Doordash was typically just a step ahead of Uber Eats, and that Amazon Fresh topped all platforms in our survey in each satisfaction category.
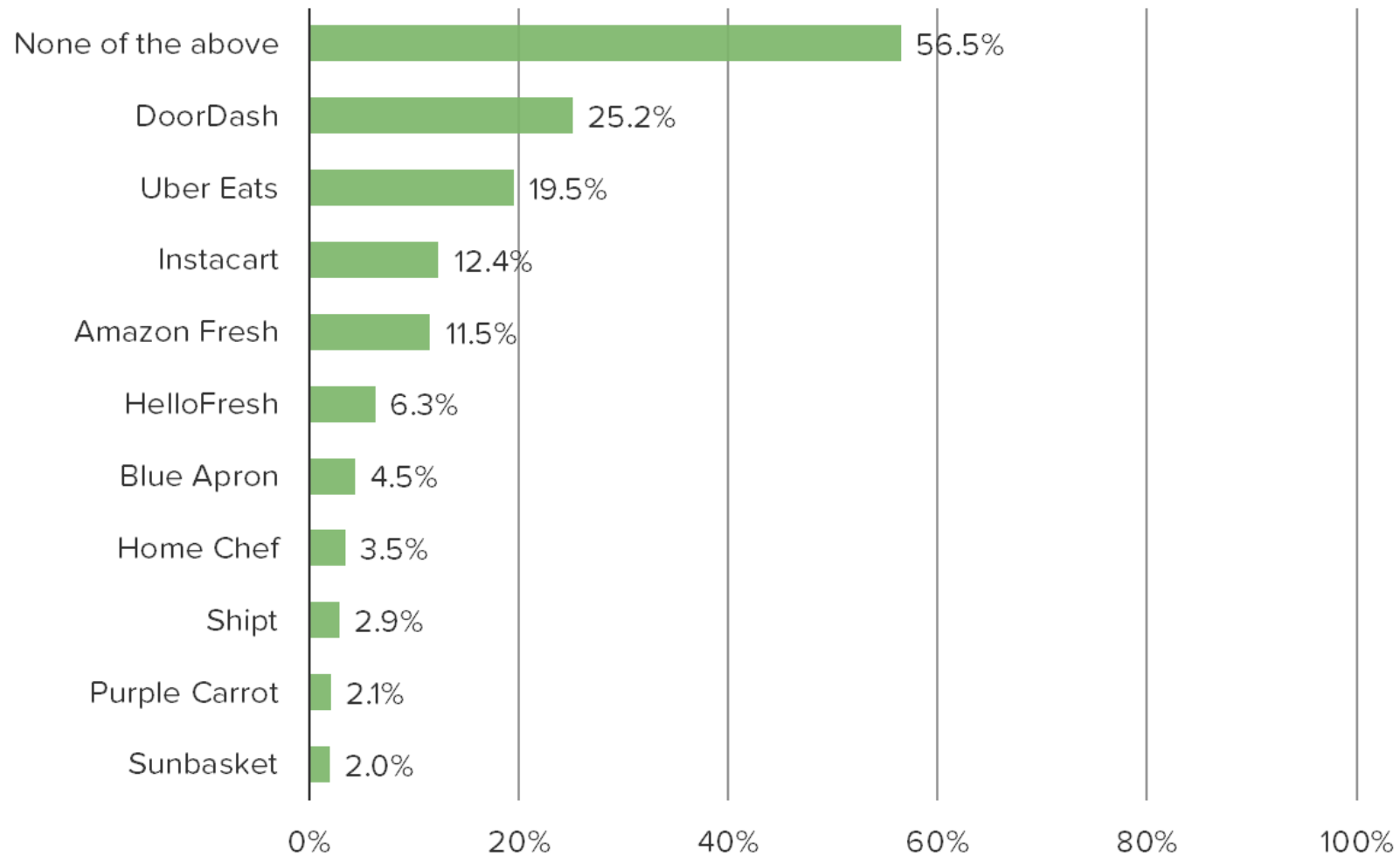
Ready Made Meals Interest
- The broader population shows moderate interest in ready made meals. Interest is much stronger among users of the various services tested in our survey, particularly meal kits providers.

Are you currently a regular or occasional customer of any of the following? (Select ALL that apply)

Posed to all respondents.

Category	Percentage
None of the above	56.5%
DoorDash	25.2%
Uber Eats	19.5%
Instacart	12.4%
Amazon Fresh	11.5%
HelloFresh	6.3%
Blue Apron	4.5%
Home Chef	3.5%
Shipt	2.9%
Purple Carrot	2.1%
Sunbasket	2.0%

When did you start using the following for the first time?

Posed to respondents who said they regularly or occasionally use each of the following.
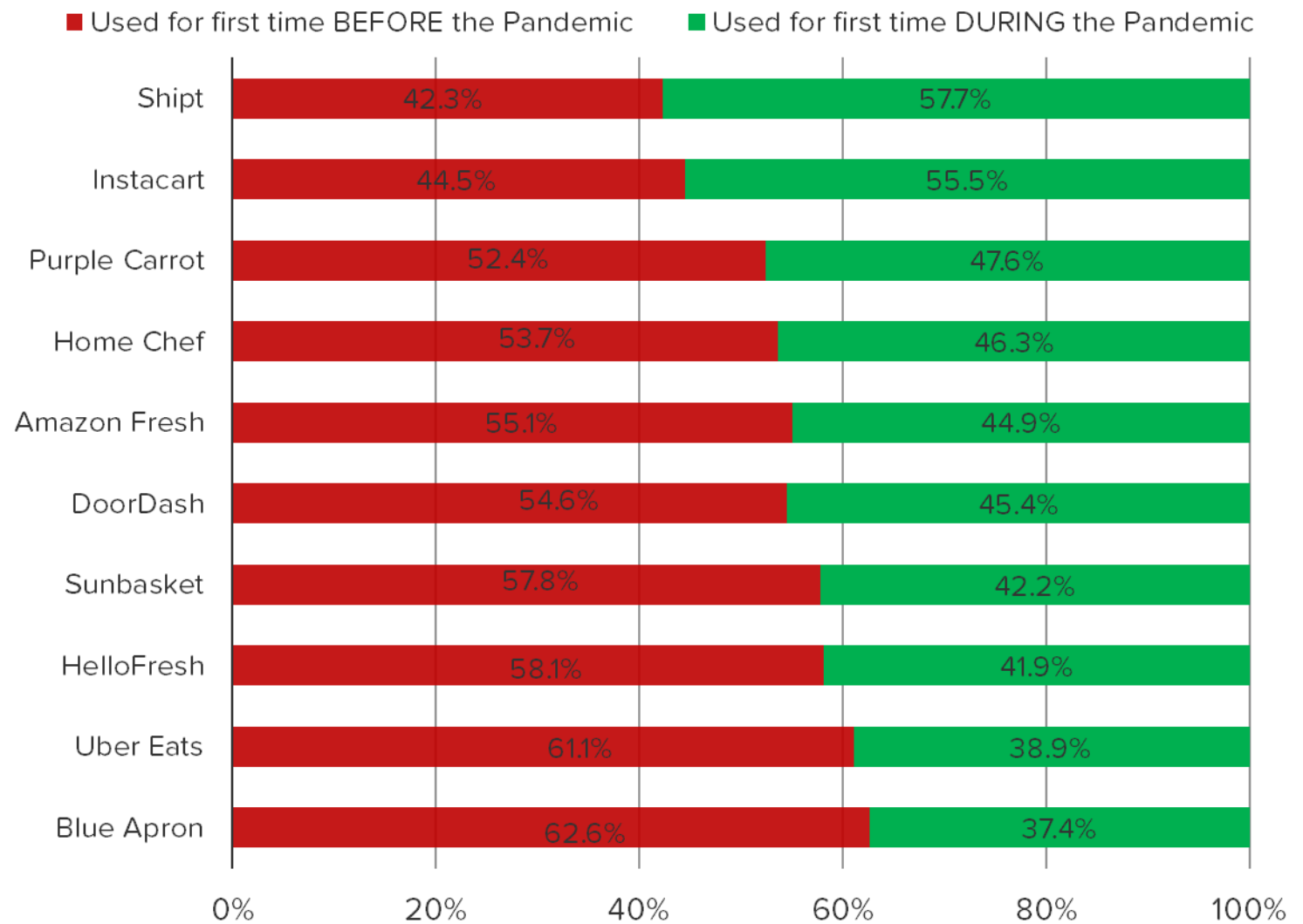
■ Used for first time BEFORE the Pandemic   ■ Used for first time DURING the Pandemic

	Before	During
Shipt	42.3%	57.7%
Instacart	44.5%	55.5%
Purple Carrot	52.4%	47.6%
Home Chef	53.7%	46.3%
Amazon Fresh	55.1%	44.9%
DoorDash	54.6%	45.4%
Sunbasket	57.8%	42.2%
HelloFresh	58.1%	41.9%
Uber Eats	61.1%	38.9%
Blue Apron	62.6%	37.4%

	N =
DoorDash	2496
Uber Eats	1932
Instacart	1209
Amazon Fresh	1117
HelloFresh	601
Blue Apron	428
Home Chef	321
Shipt	281
Purple Carrot	194
Sunbasket	181

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How frequently have you been ordering from the following during the past six months?

Posed to respondents who said they regularly or occasionally use each of the following.
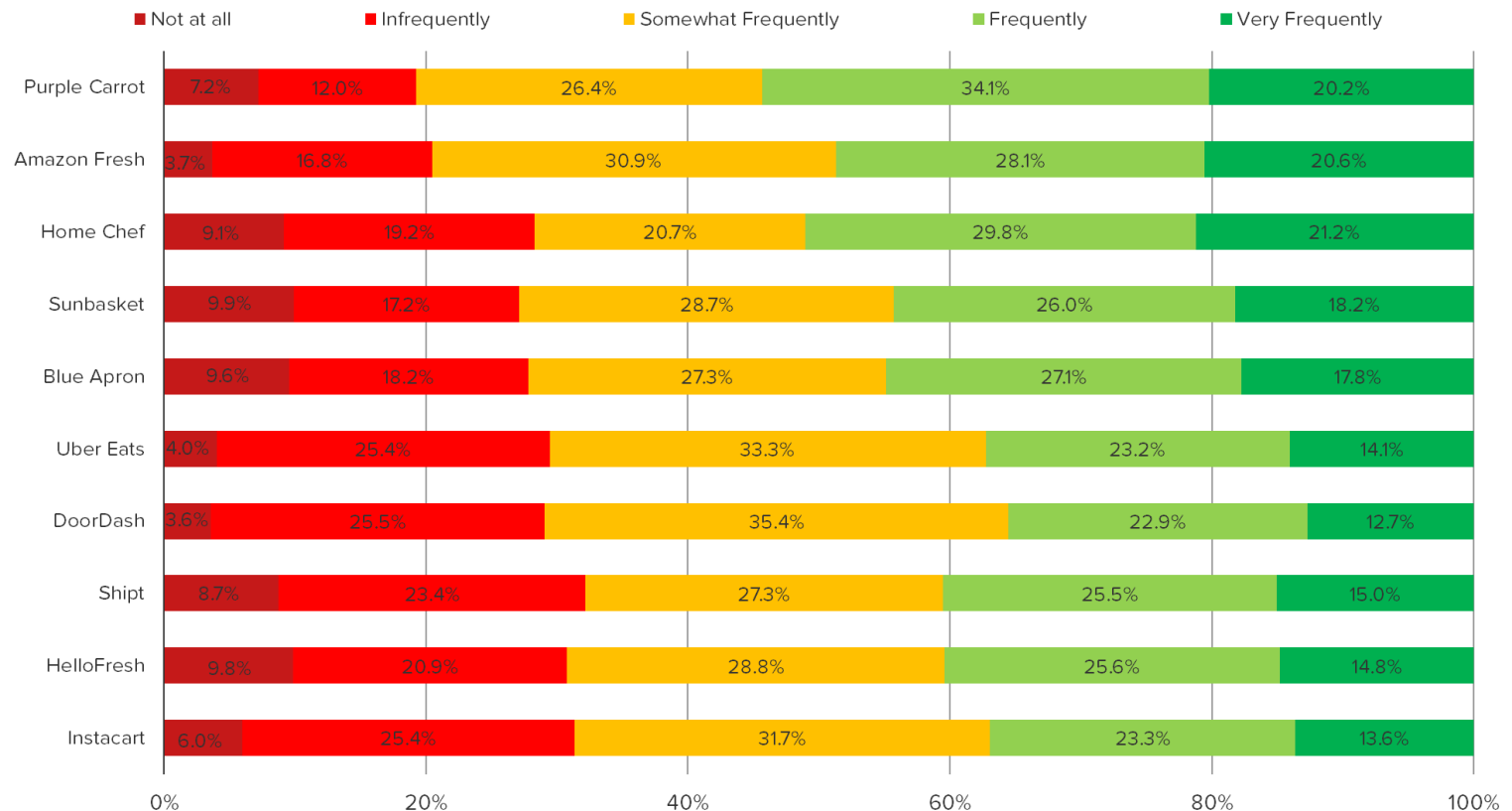
■ Not at all   ■ Infrequently   ■ Somewhat Frequently   ■ Frequently   ■ Very Frequently

	Not at all	Infrequently	Somewhat Frequently	Frequently	Very Frequently
Purple Carrot	6.3%	10.1%	31.3%	30.8%	21.6%
Amazon Fresh	3.4%	18.7%	31.0%	26.5%	20.5%
Sunbasket	8.3%	16.2%	27.6%	28.7%	19.3%
Home Chef	7.4%	19.5%	27.4%	26.3%	19.5%
DoorDash	3.1%	26.0%	34.3%	23.1%	13.5%
Uber Eats	3.2%	25.5%	34.9%	22.4%	14.0%
Instacart	4.3%	26.3%	31.9%	23.2%	14.4%
Blue Apron	11.9%	21.0%	25.1%	24.8%	17.3%
HelloFresh	9.3%	24.5%	28.0%	21.9%	16.3%
Shipt	9.1%	27.6%	26.6%	23.4%	13.3%

	N =
DoorDash	2496
Uber Eats	1932
Instacart	1209
Amazon Fresh	1117
HelloFresh	601
Blue Apron	428
Home Chef	321
Shipt	281
Purple Carrot	194
Sunbasket	181

Going forward, for the next year, how often do you expect to use the following?

Posed to respondents who said they regularly or occasionally use each of the following.
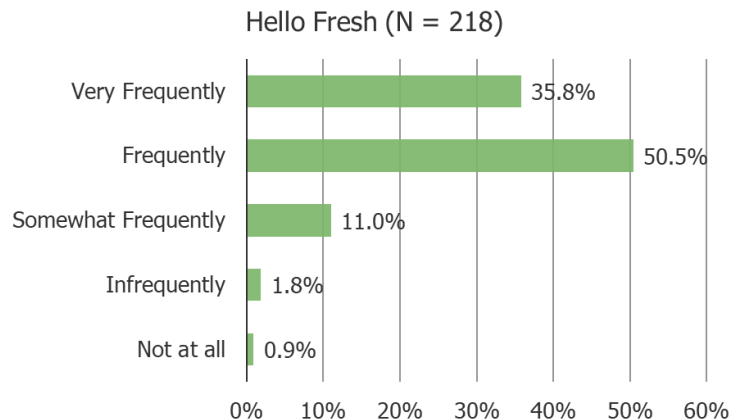
Legend: ■ Not at all ■ Infrequently ■ Somewhat Frequently ■ Frequently ■ Very Frequently

Service	Not at all	Infrequently	Somewhat Frequently	Frequently	Very Frequently
Purple Carrot	7.2%	12.0%	26.4%	34.1%	20.2%
Amazon Fresh	3.7%	16.8%	30.9%	28.1%	20.6%
Home Chef	9.1%	19.2%	20.7%	29.8%	21.2%
Sunbasket	9.9%	17.2%	28.7%	26.0%	18.2%
Blue Apron	9.6%	18.2%	27.3%	27.1%	17.8%
Uber Eats	4.0%	25.4%	33.3%	23.2%	14.1%
DoorDash	3.6%	25.5%	35.4%	22.9%	12.7%
Shipt	8.7%	23.4%	27.3%	25.5%	15.0%
HelloFresh	9.8%	20.9%	28.8%	25.6%	14.8%
Instacart	6.0%	25.4%	31.7%	23.3%	13.6%

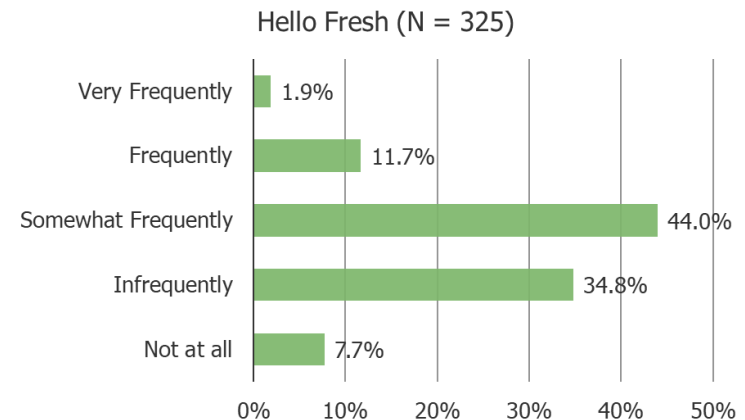|	N =
DoorDash	2496
Uber Eats	1932
Instacart	1209
Amazon Fresh	1117
HelloFresh	601
Blue Apron	428
Home Chef	321
Shipt	281
Purple Carrot	194
Sunbasket	181

Going forward, for the next year, how often do you expect to use the following?

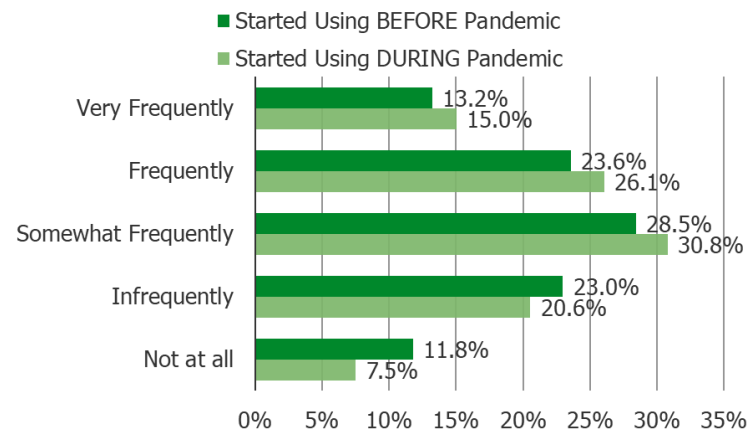*Posed to respondents who said they have used Hello Fresh frequently or very frequently during the past six months.*

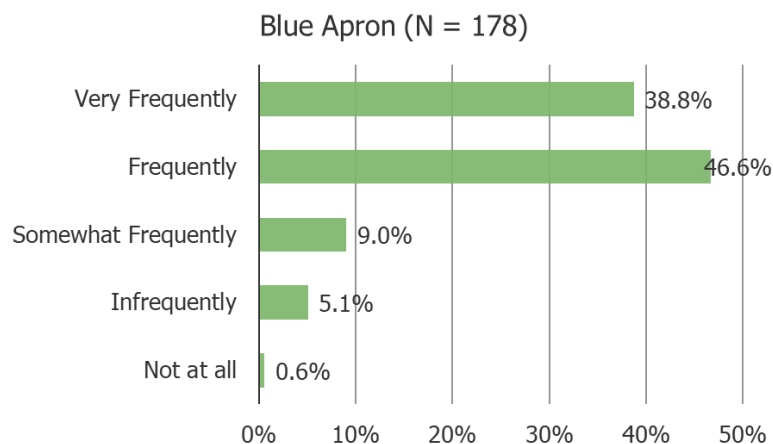| Used Platform Frequently/Very Frequently During the Past 6 Months | How Often They Expect To Use Going Forward | Used Platform Infrequently/Somewhat Frequently During the Past 6 Months | How Often They Expect To Use Going Forward |
|---|---|

Hello Fresh (N = 218)

- Very Frequently — 35.8%
- Frequently — 50.5%
- Somewhat Frequently — 11.0%
- Infrequently — 1.8%
- Not at all — 0.9%

Hello Fresh (N = 325)

- Very Frequently — 1.9%
- Frequently — 11.7%
- Somewhat Frequently — 44.0%
- Infrequently — 34.8%
- Not at all — 7.7%

Hello Fresh Users Cross-Tabbed By When They Started Using It

■ Started Using BEFORE Pandemic
■ Started Using DURING Pandemic

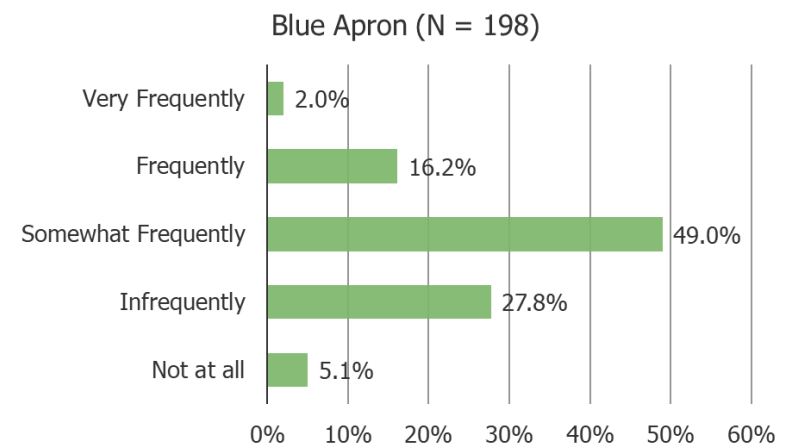|	Started Using BEFORE Pandemic	Started Using DURING Pandemic
Very Frequently	13.2%	15.0%
Frequently	23.6%	26.1%
Somewhat Frequently	28.5%	30.8%
Infrequently	23.0%	20.6%
Not at all	11.8%	7.5%

Going forward, for the next year, how often do you expect to use the following?

Posed to respondents who said they have used Blue Apron frequently or very frequently during the past six months.
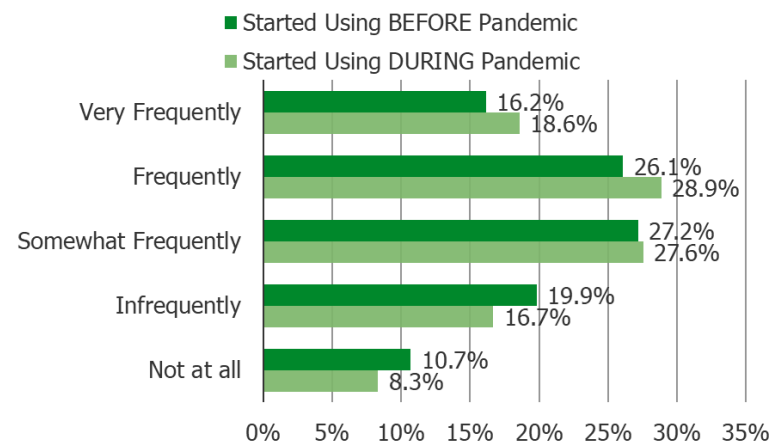
Used Platform Frequently/Very Frequently During the Past 6 Months | How Often They Expect To Use Going Forward

Used Platform Infrequently/Somewhat Frequently During the Past 6 Months | How Often They Expect To Use Going Forward

Blue Apron (N = 178)

Very Frequently	38.8%
Frequently	46.6%
Somewhat Frequently	9.0%
Infrequently	5.1%
Not at all	0.6%

Blue Apron (N = 198)

Very Frequently	2.0%
Frequently	16.2%
Somewhat Frequently	49.0%
Infrequently	27.8%
Not at all	5.1%

Blue Apron Users Cross-Tabbed By When They Started Using It

■ Started Using BEFORE Pandemic
■ Started Using DURING Pandemic

	Before	During
Very Frequently	16.2%	18.6%
Frequently	26.1%	28.9%
Somewhat Frequently	27.2%	27.6%
Infrequently	19.9%	16.7%
Not at all	10.7%	8.3%

Going forward, for the next year, how often do you expect to use the following?

Posed to respondents who said they have used Home Chef frequently or very frequently during the past six months.

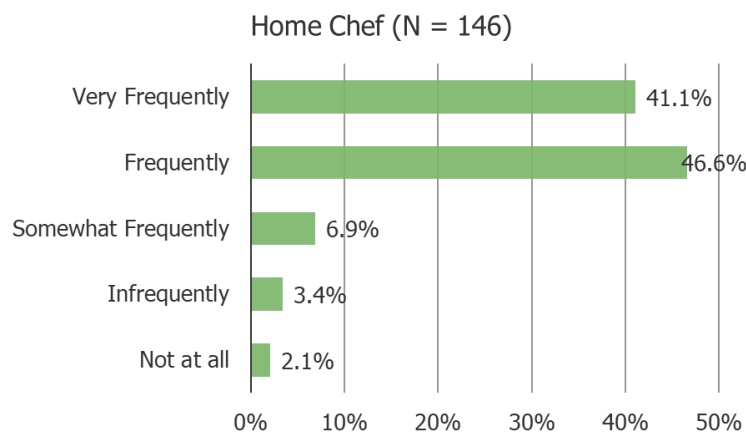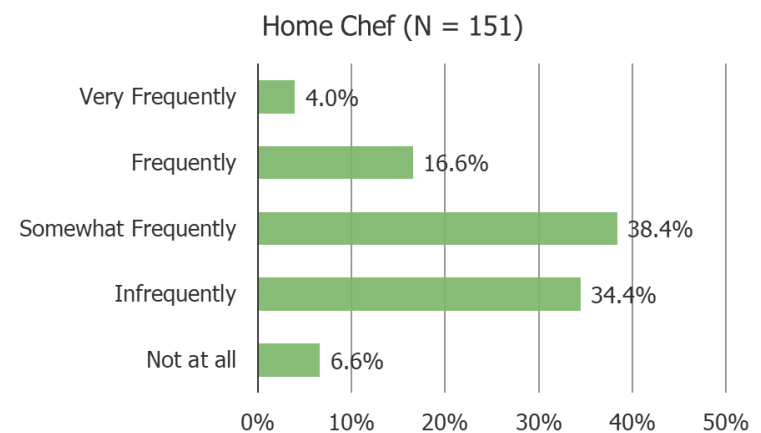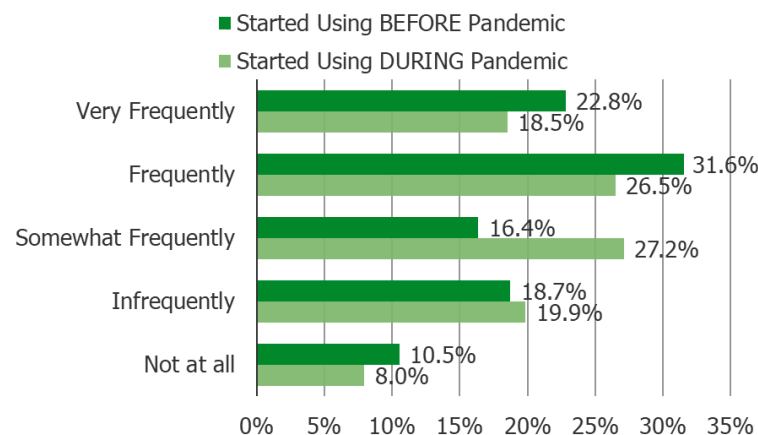| Used Platform Frequently/Very Frequently During the Past 6 Months | How Often They Expect To Use Going Forward | Used Platform Infrequently/Somewhat Frequently During the Past 6 Months | How Often They Expect To Use Going Forward |
|---|---|

Home Chef (N = 146)

Very Frequently	41.1%
Frequently	46.6%
Somewhat Frequently	6.9%
Infrequently	3.4%
Not at all	2.1%

Home Chef (N = 151)

Very Frequently	4.0%
Frequently	16.6%
Somewhat Frequently	38.4%
Infrequently	34.4%
Not at all	6.6%

Home Chef Users Cross-Tabbed By When They Started Using It

- Started Using BEFORE Pandemic
- Started Using DURING Pandemic

	BEFORE	DURING
Very Frequently	22.8%	18.5%
Frequently	31.6%	26.5%
Somewhat Frequently	16.4%	27.2%
Infrequently	18.7%	19.9%
Not at all	10.5%	8.0%

Going forward, for the next year, how often do you expect to use the following?

Posed to respondents who said they have used Purple Carrot frequently or very frequently during the past six months.

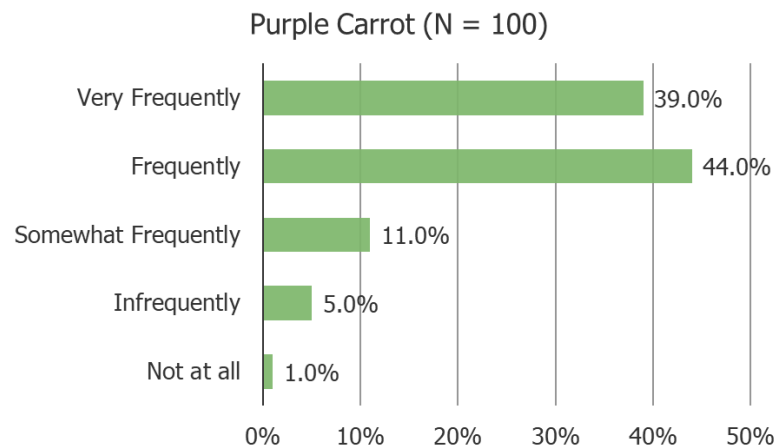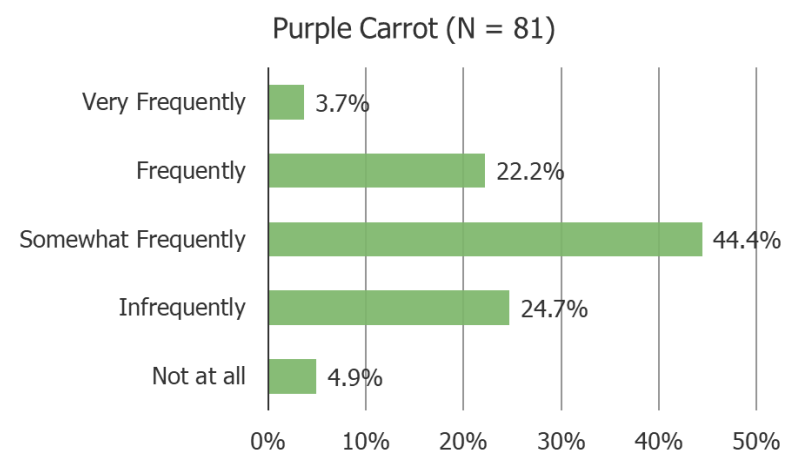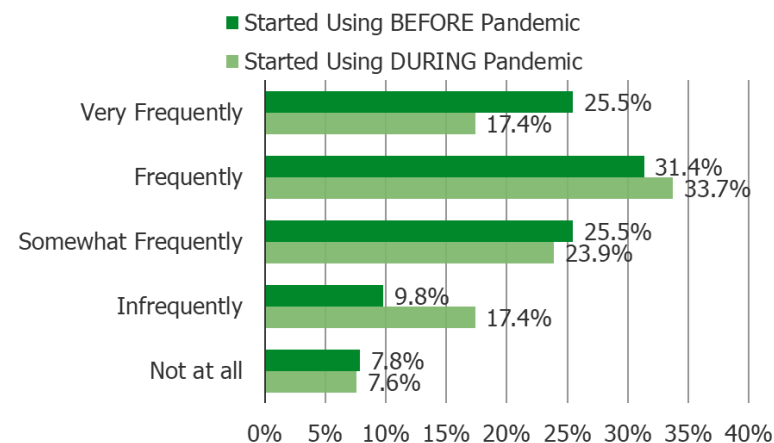| Used Platform Frequently/Very Frequently During the Past 6 Months | How Often They Expect To Use Going Forward	Used Platform Infrequently/Somewhat Frequently During the Past 6 Months | How Often They Expect To Use Going Forward

Purple Carrot (N = 100)

Very Frequently	39.0%
Frequently	44.0%
Somewhat Frequently	11.0%
Infrequently	5.0%
Not at all	1.0%

Purple Carrot (N = 81)

Very Frequently	3.7%
Frequently	22.2%
Somewhat Frequently	44.4%
Infrequently	24.7%
Not at all	4.9%

Purple Carrot Users Cross-Tabbed By When They Started Using It

■ Started Using BEFORE Pandemic
■ Started Using DURING Pandemic

	Started Using BEFORE Pandemic	Started Using DURING Pandemic
Very Frequently	25.5%	17.4%
Frequently	31.4%	33.7%
Somewhat Frequently	25.5%	23.9%
Infrequently	9.8%	17.4%
Not at all	7.8%	7.6%

Going forward, for the next year, how often do you expect to use the following?

Posed to respondents who said they have used Uber Eats frequently or very frequently during the past six months.

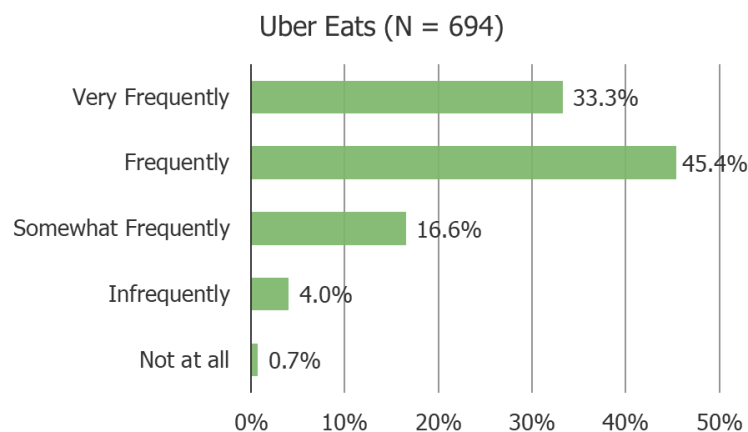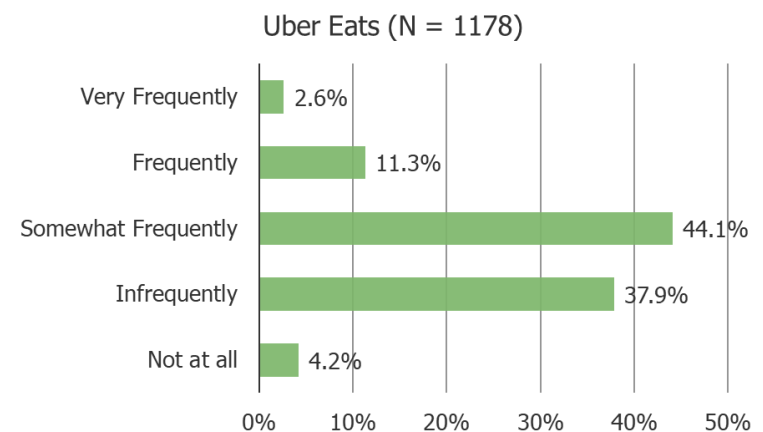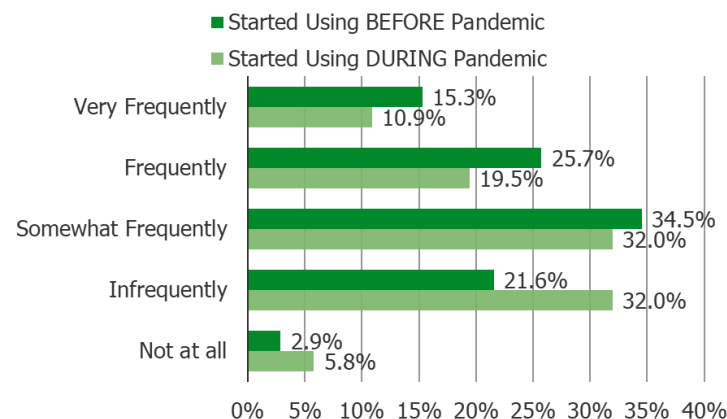| Used Platform Frequently/Very Frequently During the Past 6 Months | How Often They Expect To Use Going Forward	Used Platform Infrequently/Somewhat Frequently During the Past 6 Months | How Often They Expect To Use Going Forward

Uber Eats (N = 694)

Very Frequently	33.3%
Frequently	45.4%
Somewhat Frequently	16.6%
Infrequently	4.0%
Not at all	0.7%

Uber Eats (N = 1178)

Very Frequently	2.6%
Frequently	11.3%
Somewhat Frequently	44.1%
Infrequently	37.9%
Not at all	4.2%

Uber Eats Users Cross-Tabbed By When They Started Using It

- Started Using BEFORE Pandemic
- Started Using DURING Pandemic

	Started Using BEFORE Pandemic	Started Using DURING Pandemic
Very Frequently	15.3%	10.9%
Frequently	25.7%	19.5%
Somewhat Frequently	34.5%	32.0%
Infrequently	21.6%	32.0%
Not at all	2.9%	5.8%

Going forward, for the next year, how often do you expect to use the following?

Posed to respondents who said they have used DoorDash frequently or very frequently during the past six months.

Used Platform Frequently/Very Frequently During the Past 6 Months | How Often They Expect To Use Going Forward

DoorDash (N = 903)

Category	Value
Very Frequently	31.0%
Frequently	44.6%
Somewhat Frequently	19.6%
Infrequently	4.5%
Not at all	0.2%

Used Platform Infrequently/Somewhat Frequently During the Past 6 Months | How Often They Expect To Use Going Forward

DoorDash (N = 1514)

Category	Value
Very Frequently	1.8%
Frequently	10.9%
Somewhat Frequently	45.8%
Infrequently	37.7%
Not at all	3.8%

Door Dash Users Cross-Tabbed By When They Started Using It

■ Started Using BEFORE Pandemic
■ Started Using DURING Pandemic

Category	Before Pandemic	During Pandemic
Very Frequently	13.4%	11.0%
Frequently	24.7%	20.6%
Somewhat Frequently	36.9%	33.7%
Infrequently	22.2%	30.0%
Not at all	2.9%	4.7%

Going forward, for the next year, how often do you expect to use the following?

Posed to respondents who said they have used Amazon Fresh frequently or very frequently during the past six months.

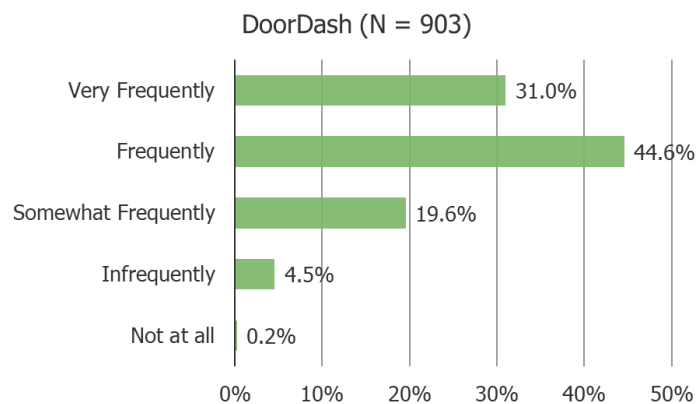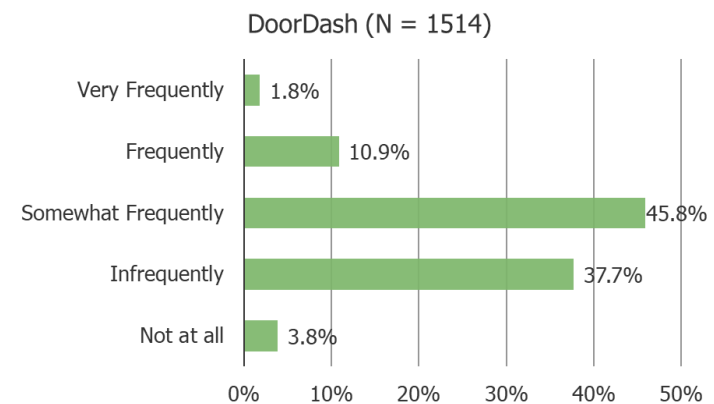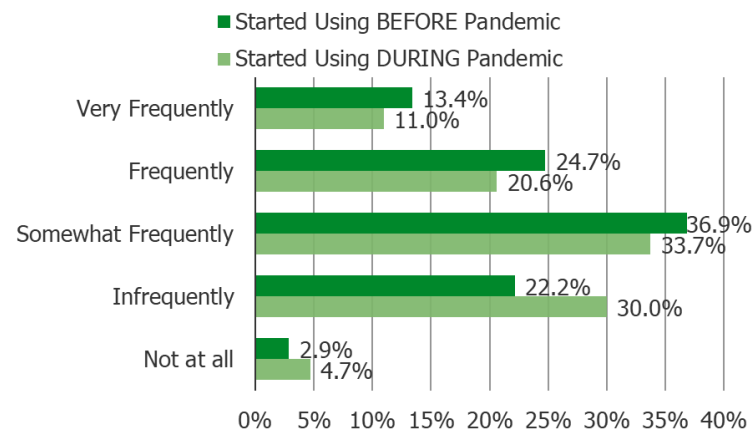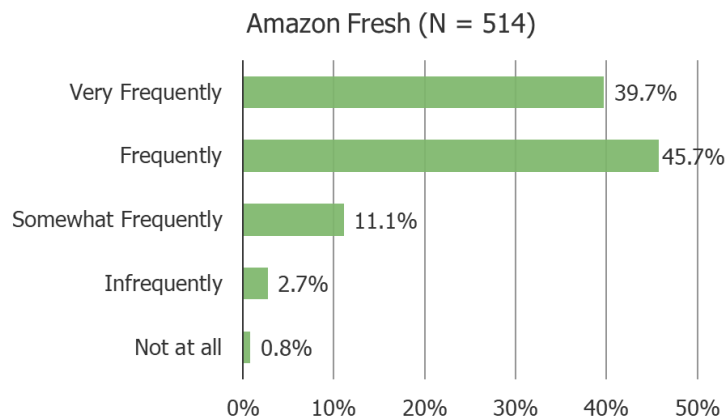| Used Platform Frequently/Very Frequently During the Past 6 Months | How Often They Expect To Use Going Forward | Used Platform Infrequently/Somewhat Frequently During the Past 6 Months | How Often They Expect To Use Going Forward |

Amazon Fresh (N = 514)

- Very Frequently — 39.7%
- Frequently — 45.7%
- Somewhat Frequently — 11.1%
- Infrequently — 2.7%
- Not at all — 0.8%

Amazon Fresh (N = 567)

- Very Frequently — 3.5%
- Frequently — 13.4%
- Somewhat Frequently — 50.1%
- Infrequently — 29.5%
- Not at all — 3.5%

Amazon Fresh Users Cross-Tabbed By When They Started Using It

■ Started Using BEFORE Pandemic
■ Started Using DURING Pandemic

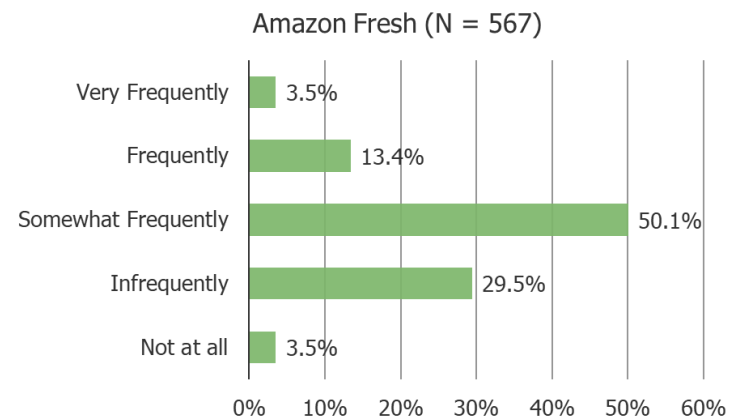|	BEFORE	DURING
Very Frequently	23.4%	16.1%
Frequently	30.4%	24.9%
Somewhat Frequently	30.0%	32.1%
Infrequently	13.6%	21.5%
Not at all	2.6%	5.4%

Going forward, for the next year, how often do you expect to use the following?

Posed to respondents who said they have used Instacart frequently or very frequently during the past six months.
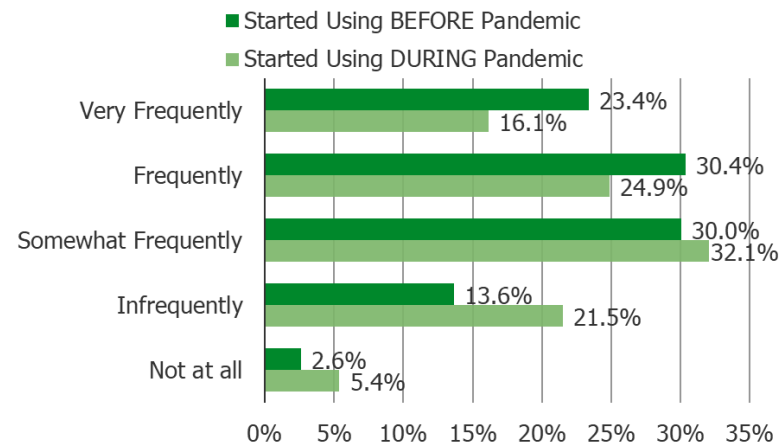
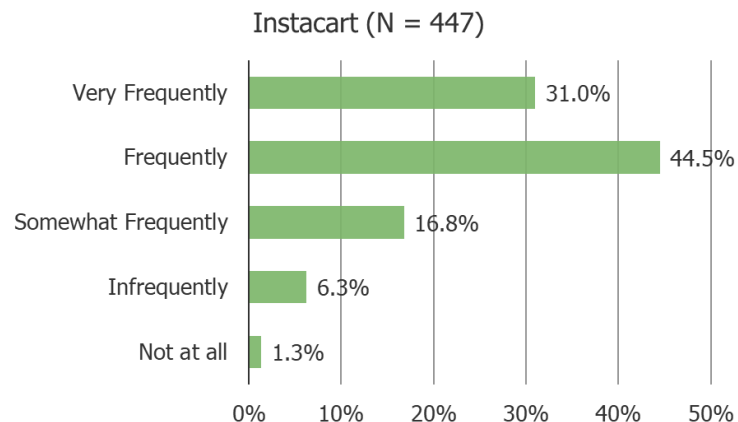| Used Platform Frequently/Very Frequently During the Past 6 Months | How Often They Expect To Use Going Forward	Used Platform Infrequently/Somewhat Frequently During the Past 6 Months | How Often They Expect To Use Going Forward

Instacart (N = 447)

Very Frequently	31.0%
Frequently	44.5%
Somewhat Frequently	16.8%
Infrequently	6.3%
Not at all	1.3%

Instacart (N = 567)

Very Frequently	3.2%
Frequently	11.0%
Somewhat Frequently	42.6%
Infrequently	36.7%
Not at all	6.5%

Instacart Users Cross-Tabbed By When They Started Using It

- ■ Started Using BEFORE Pandemic
- ■ Started Using DURING Pandemic

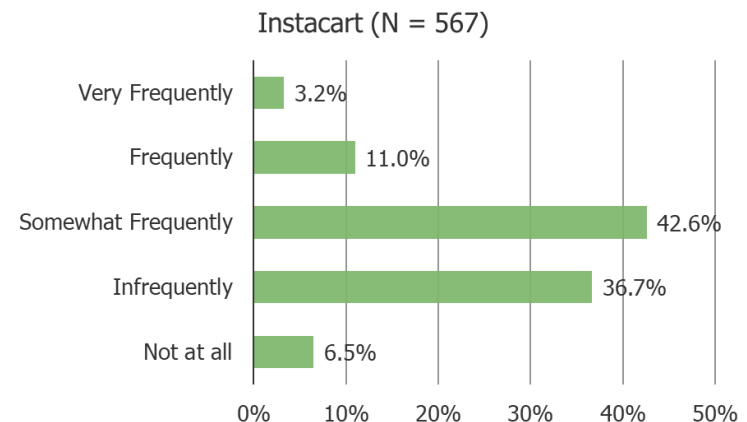|	Started Using BEFORE Pandemic	Started Using DURING Pandemic
Very Frequently	17.3%	10.4%
Frequently	25.3%	21.3%
Somewhat Frequently	31.7%	31.7%
Infrequently	20.7%	29.8%
Not at all	5.0%	6.9%

Going forward, for the next year, how often do you expect to use the following?

Posed to respondents who said they have used Shipt frequently or very frequently during the past six months.
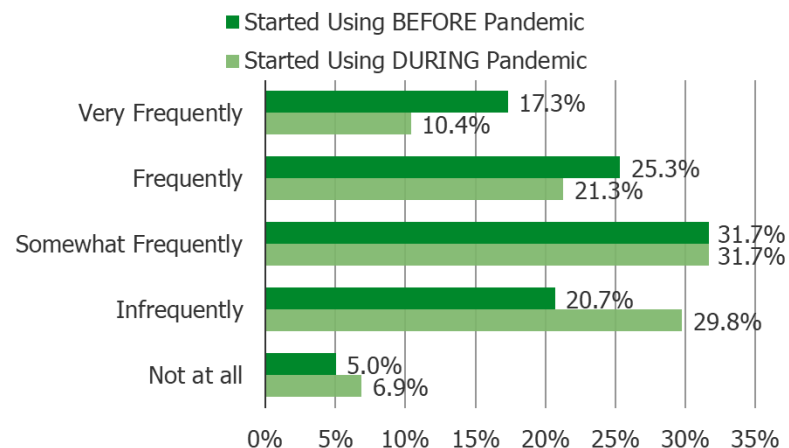
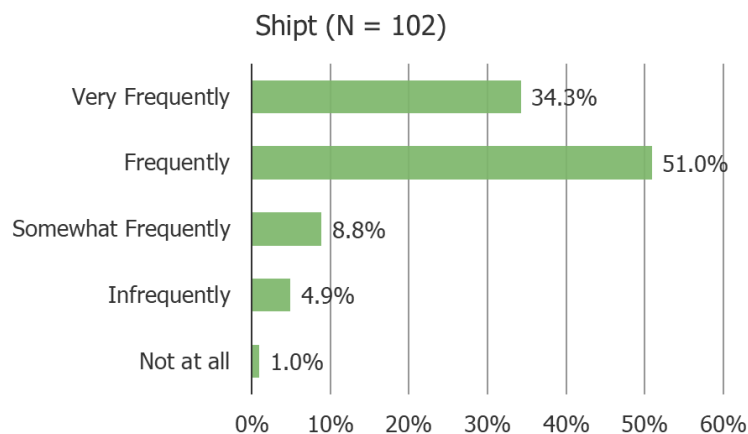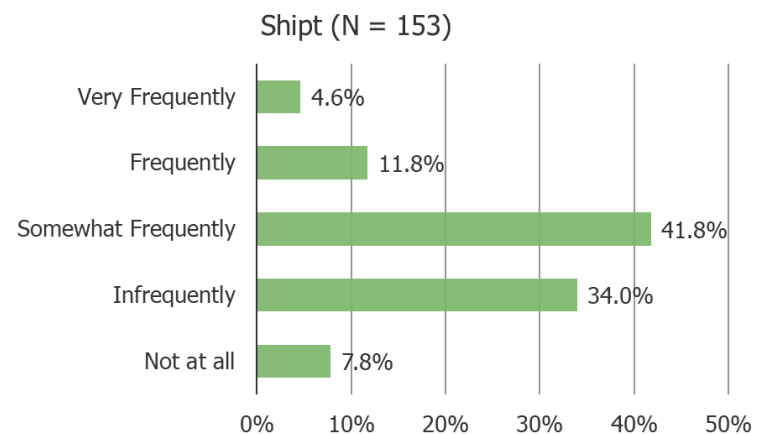| Used Platform Frequently/Very Frequently During the Past 6 Months | How Often They Expect To Use Going Forward	Used Platform Infrequently/Somewhat Frequently During the Past 6 Months | How Often They Expect To Use Going Forward

Shipt (N = 102)

- Very Frequently — 34.3%
- Frequently — 51.0%
- Somewhat Frequently — 8.8%
- Infrequently — 4.9%
- Not at all — 1.0%

Shipt (N = 153)

- Very Frequently — 4.6%
- Frequently — 11.8%
- Somewhat Frequently — 41.8%
- Infrequently — 34.0%
- Not at all — 7.8%

Shipt Users Cross-Tabbed By When They Started Using It

Started Using BEFORE Pandemic / Started Using DURING Pandemic

- Very Frequently — 18.0% / 12.8%
- Frequently — 30.8% / 22.6%
- Somewhat Frequently — 23.1% / 29.3%
- Infrequently — 22.2% / 24.4%
- Not at all — 6.0% / 11.0%

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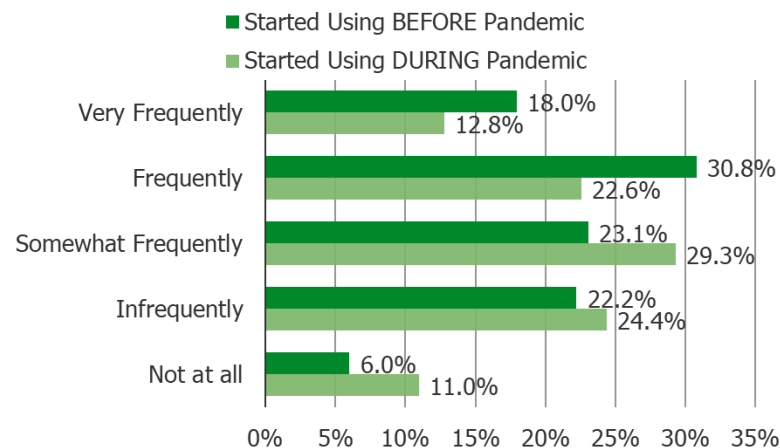
How do you rate the following when it comes to quality of the product?

Posed to respondents who said they regularly or occasionally use each of the following.
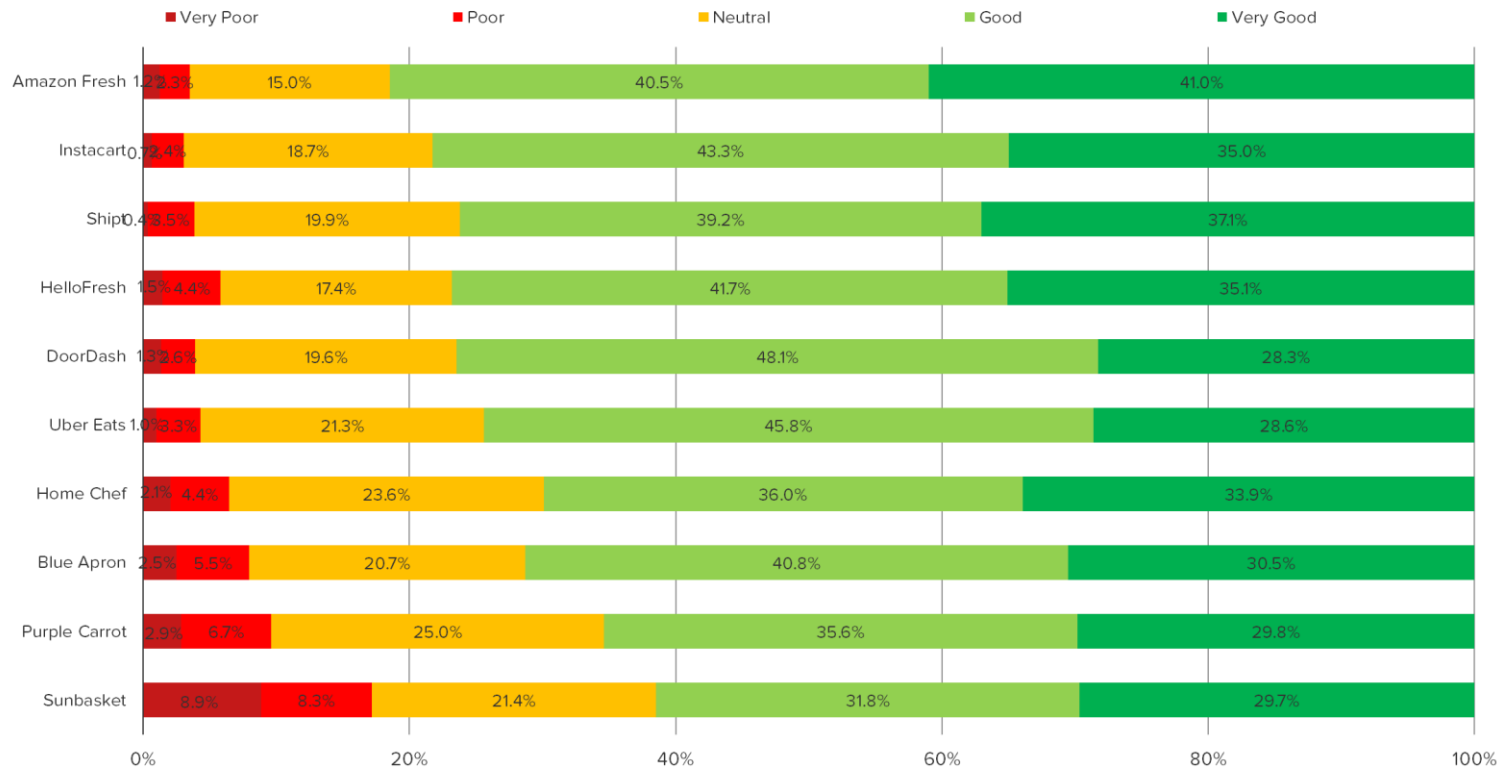
Legend: ■ Very Poor ■ Poor ■ Neutral ■ Good ■ Very Good

	Very Poor	Poor	Neutral	Good	Very Good
Amazon Fresh	1.2%	2.3%	15.0%	40.5%	41.0%
Instacart	0.7%	2.4%	18.7%	43.3%	35.0%
Shipt	0.4%	3.5%	19.9%	39.2%	37.1%
HelloFresh	1.5%	4.4%	17.4%	41.7%	35.1%
DoorDash	1.3%	2.6%	19.6%	48.1%	28.3%
Uber Eats	1.0%	3.3%	21.3%	45.8%	28.6%
Home Chef	2.1%	4.4%	23.6%	36.0%	33.9%
Blue Apron	2.5%	5.5%	20.7%	40.8%	30.5%
Purple Carrot	2.9%	6.7%	25.0%	35.6%	29.8%
Sunbasket	8.9%	8.3%	21.4%	31.8%	29.7%

	N =
DoorDash	2496
Uber Eats	1932
Instacart	1209
Amazon Fresh	1117
HelloFresh	601
Blue Apron	428
Home Chef	321
Shipt	281
Purple Carrot	194
Sunbasket	181

How do you rate the following when it comes service/delivery times?

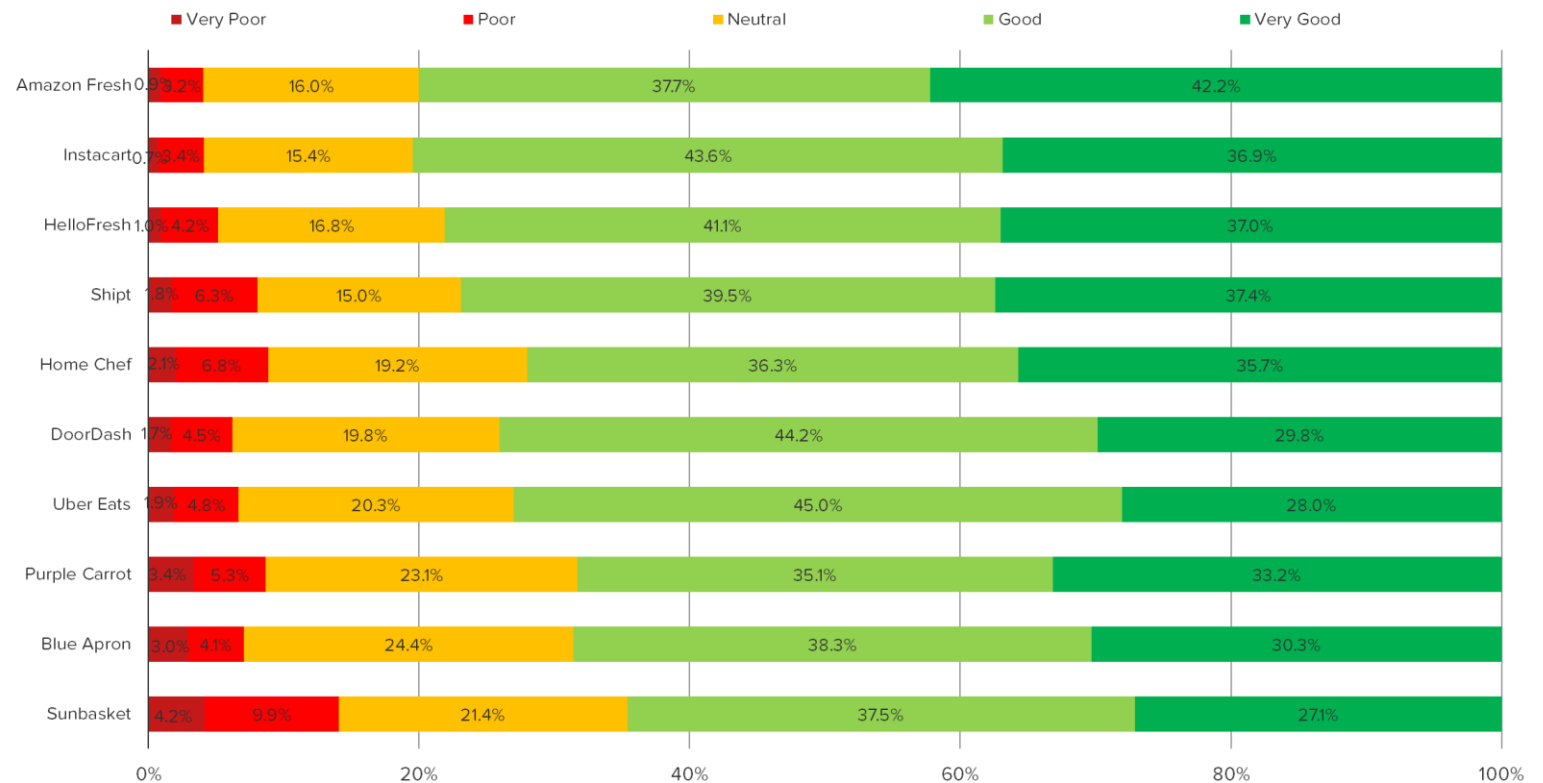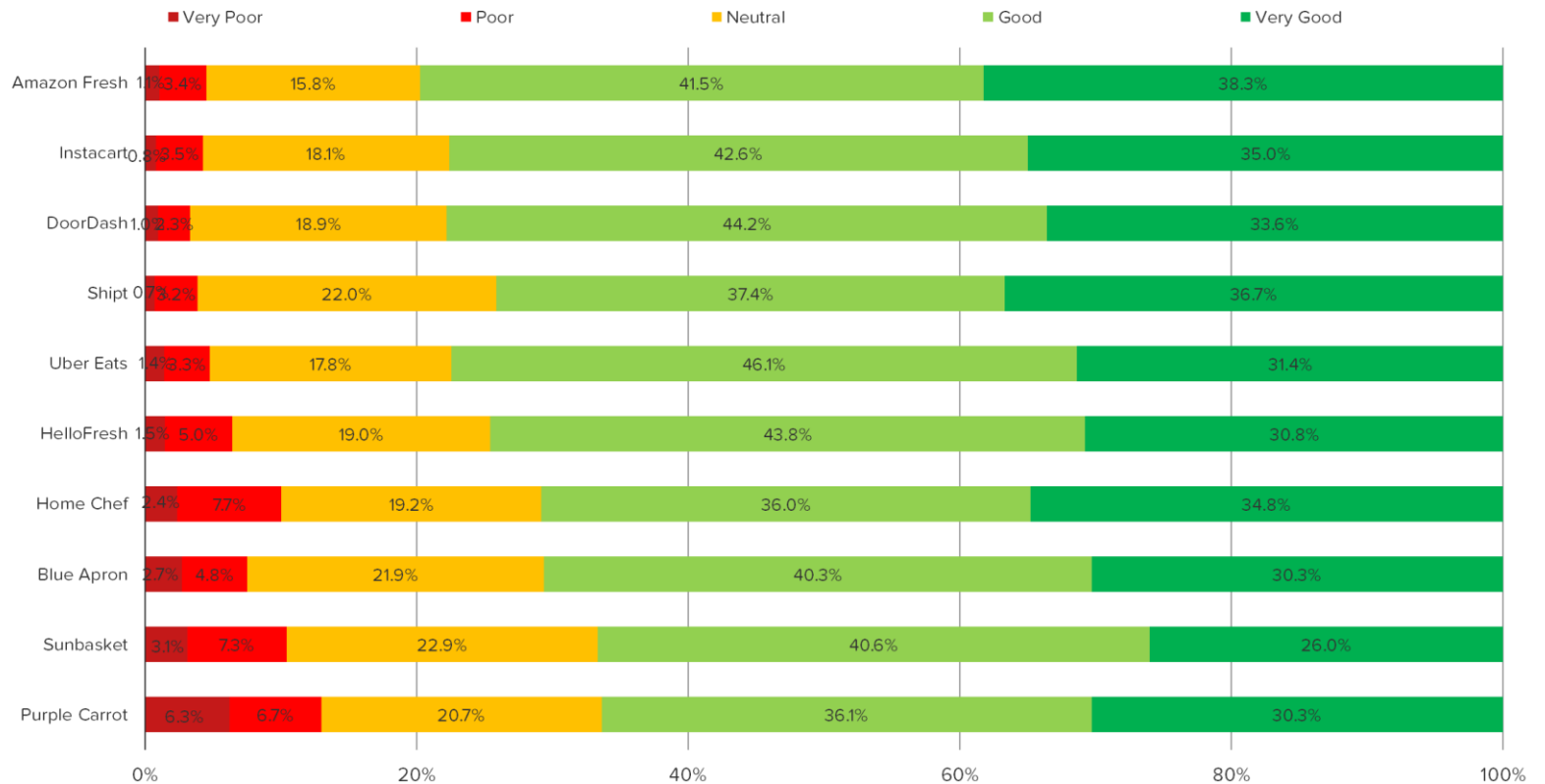*Posed to respondents who said they regularly or occasionally use each of the following.*

Legend: ■ Very Poor   ■ Poor   ■ Neutral   ■ Good   ■ Very Good

Brand	Very Poor	Poor	Neutral	Good	Very Good
Amazon Fresh	0.9%	3.2%	16.0%	37.7%	42.2%
Instacart	0.7%	3.4%	15.4%	43.6%	36.9%
HelloFresh	1.0%	4.2%	16.8%	41.1%	37.0%
Shipt	1.8%	6.3%	15.0%	39.5%	37.4%
Home Chef	2.1%	6.8%	19.2%	36.3%	35.7%
DoorDash	1.7%	4.5%	19.8%	44.2%	29.8%
Uber Eats	1.9%	4.8%	20.3%	45.0%	28.0%
Purple Carrot	3.4%	5.3%	23.1%	35.1%	33.2%
Blue Apron	3.0%	4.1%	24.4%	38.3%	30.3%
Sunbasket	4.2%	9.9%	21.4%	37.5%	27.1%

	N =
DoorDash	2496
Uber Eats	1932
Instacart	1209
Amazon Fresh	1117
HelloFresh	601
Blue Apron	428
Home Chef	321
Shipt	281
Purple Carrot	194
Sunbasket	181

How do you rate the following when it comes to variety/selection?

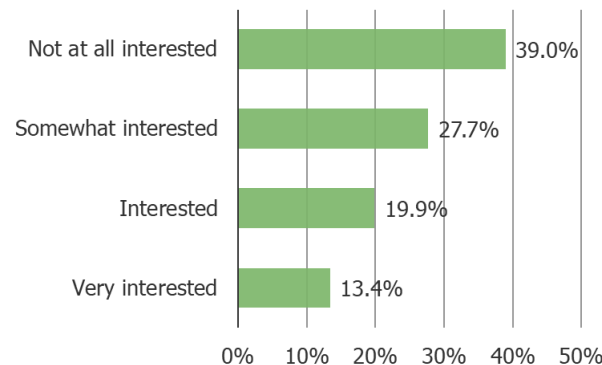*Posed to respondents who said they regularly or occasionally use each of the following.*

Legend: ■ Very Poor   ■ Poor   ■ Neutral   ■ Good   ■ Very Good

	Very Poor	Poor	Neutral	Good	Very Good
Amazon Fresh	1.1%	3.4%	15.8%	41.5%	38.3%
Instacart	0.8%	3.5%	18.1%	42.6%	35.0%
DoorDash	1.0%	2.3%	18.9%	44.2%	33.6%
Shipt	0.7%	3.2%	22.0%	37.4%	36.7%
Uber Eats	1.4%	3.3%	17.8%	46.1%	31.4%
HelloFresh	1.5%	5.0%	19.0%	43.8%	30.8%
Home Chef	2.4%	7.7%	19.2%	36.0%	34.8%
Blue Apron	2.7%	4.8%	21.9%	40.3%	30.3%
Sunbasket	3.1%	7.3%	22.9%	40.6%	26.0%
Purple Carrot	6.3%	6.7%	20.7%	36.1%	30.3%

	N =
DoorDash	2496
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How much interest do you have in ready made meals? IE, meals that are shipped to and just need to be heated up with no other preparation.

Posed to all respondents.

Posed to respondents who said they regularly or occasionally use each of the following.

	N =
DoorDash	2496
Uber Eats	1932
Instacart	1209
Amazon Fresh	1117
HelloFresh	601
Blue Apron	428
Home Chef	321
Shipt	281
Purple Carrot	194
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