

BACKGROUND:

- ❑ Survey of 1,500+ US Consumers balanced to census with special cross-tab analysis of Amazon Prime members and their usage of food delivery apps.

FINDINGS:

❑ ***Amazon Prime Members and Food Delivery Apps***

- ❑ Amazon Prime users are considerably more likely to be food delivery app users than non-Prime members. Of the food delivery apps, they are most likely to be currently using Uber Eats and Door Dash.
- ❑ Most food delivery app users said they are Amazon Prime members (this is true of all food delivery apps that we tested including Grubhub, Uber Eats, Door Dash, and Postmates).

❑ ***Food Delivery, Grocery, and Mealkits Usage***

- ❑ The percentage of consumers who regularly or occasionally use food delivery apps increased considerably during the pandemic and has remained flatter in recent months. Frequent food delivery users (ie, weekly or more often) favor Uber Eats and Door Dash (and at an increasing rate as of late).
- ❑ Consumers are back to visiting grocery stores at around the same rate that they were pre-pandemic (during the pandemic, the % of consumers who said they did not visit a grocery store in the past month increased to series highs).
- ❑ In contrast to food delivery platform engagement, which has remained mostly flat against pandemic highs, the percentage of consumers who have ordered groceries online and meal kits online in the past month has fallen from series highs (though important to note that levels are still above pre-pandemic levels).
- ❑ The percentage of Grubhub users who ALSO use Uber Eats and Door Dash has increased sequentially in our trackers since 2019.

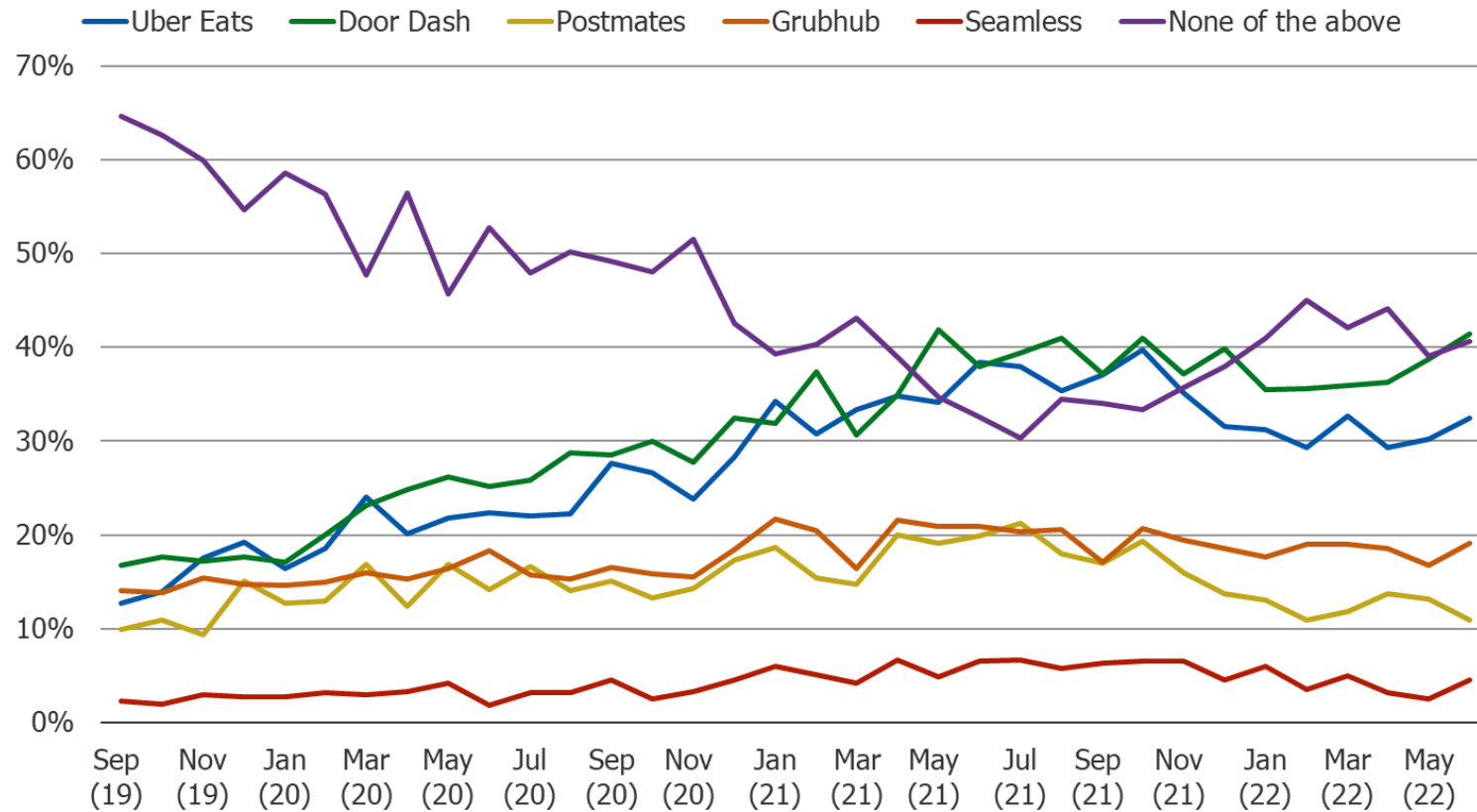


Amazon Prime and Food Delivery Cross-Tabs



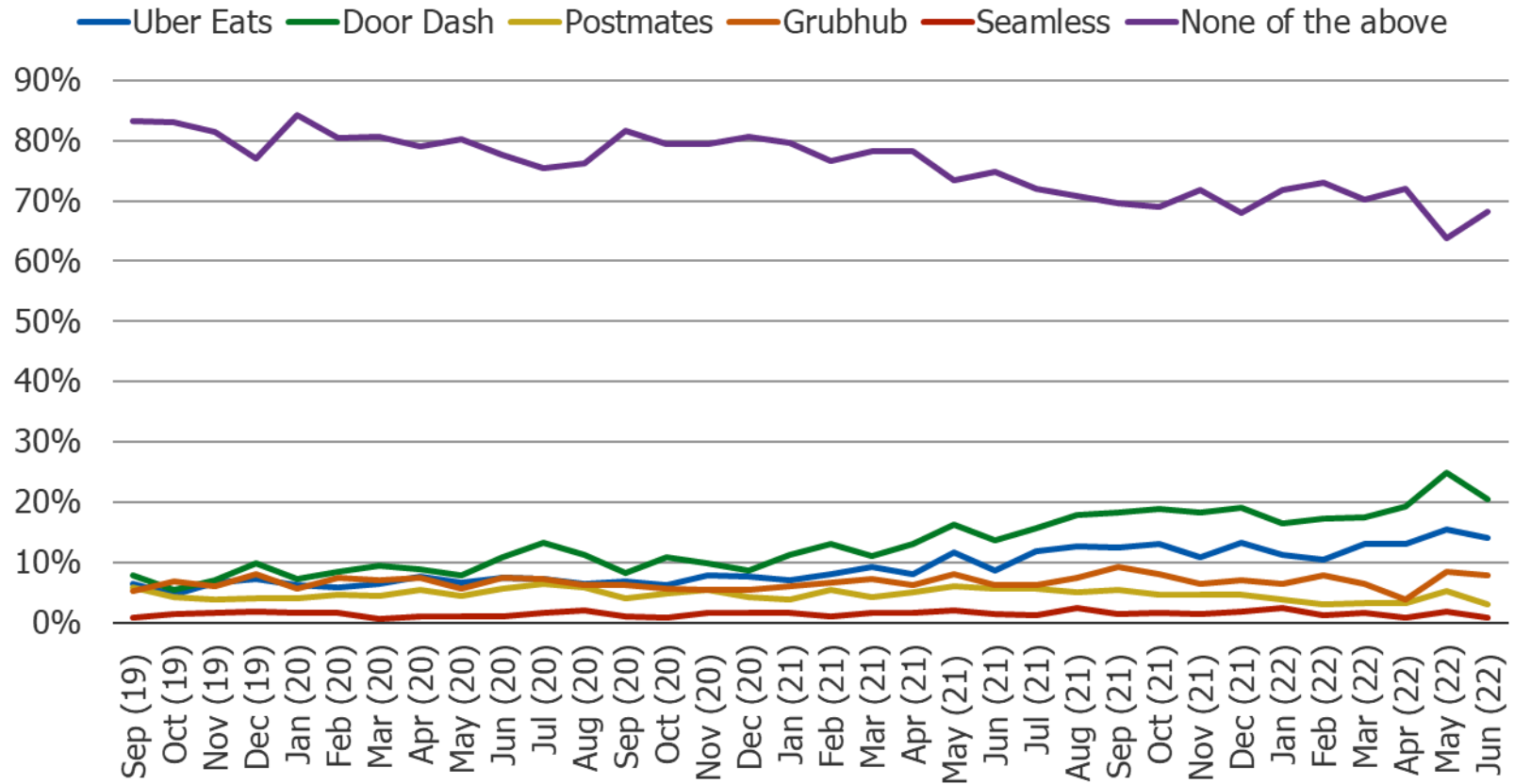
Do you regularly or occasionally use the following food delivery sites / apps?

Posed to Amazon Prime members.



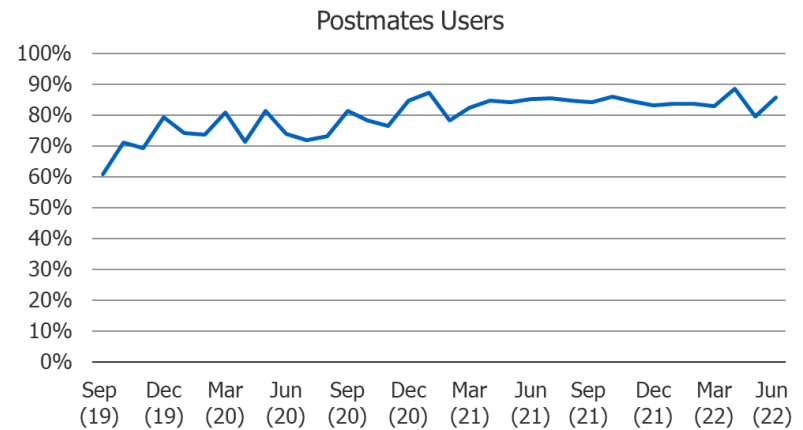
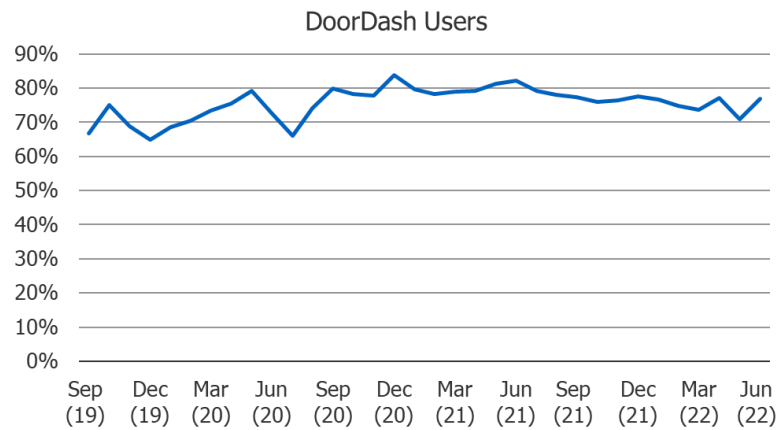
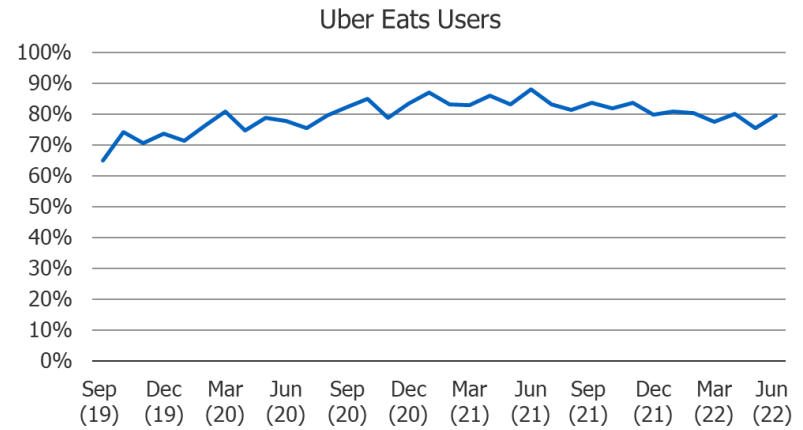
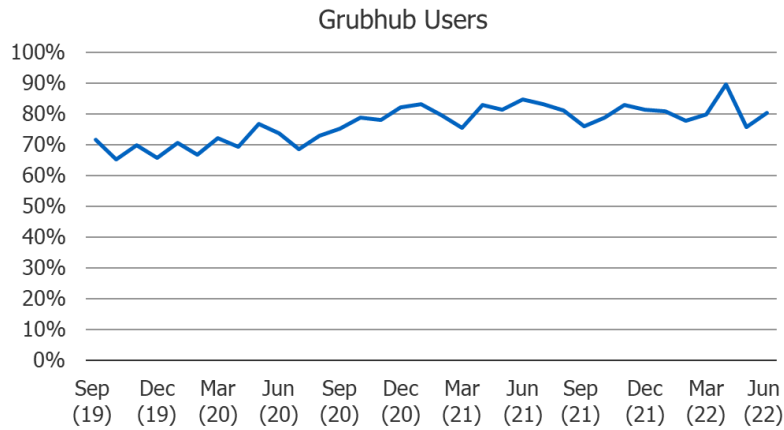
Do you regularly or occasionally use the following food delivery sites / apps?

Posed to respondents who are NOT Amazon Prime members.



Are you an Amazon Prime member? % Yes

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

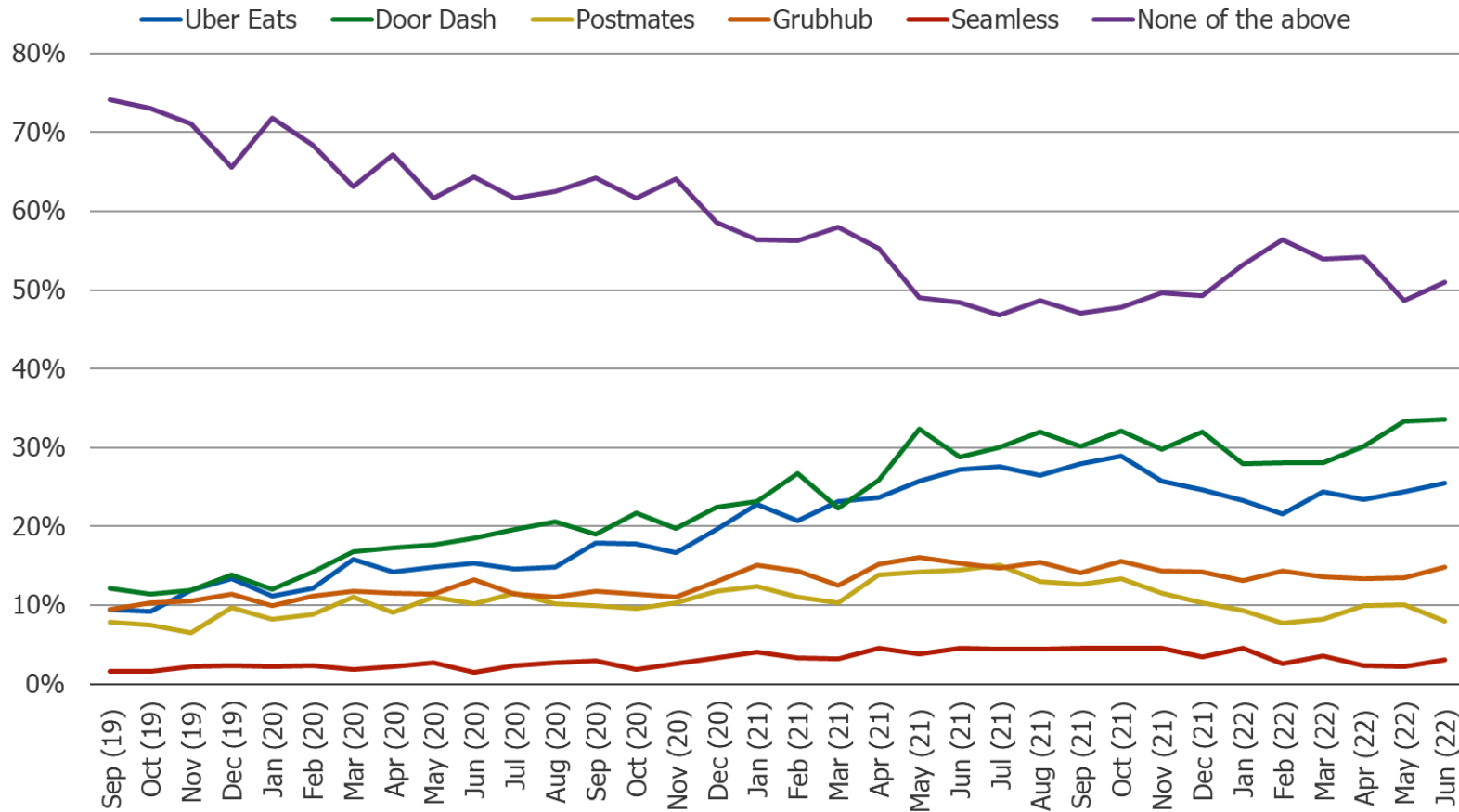


Overall Data Trackers | Food Delivery, Grocery, Grocery Delivery, and Meal Kits



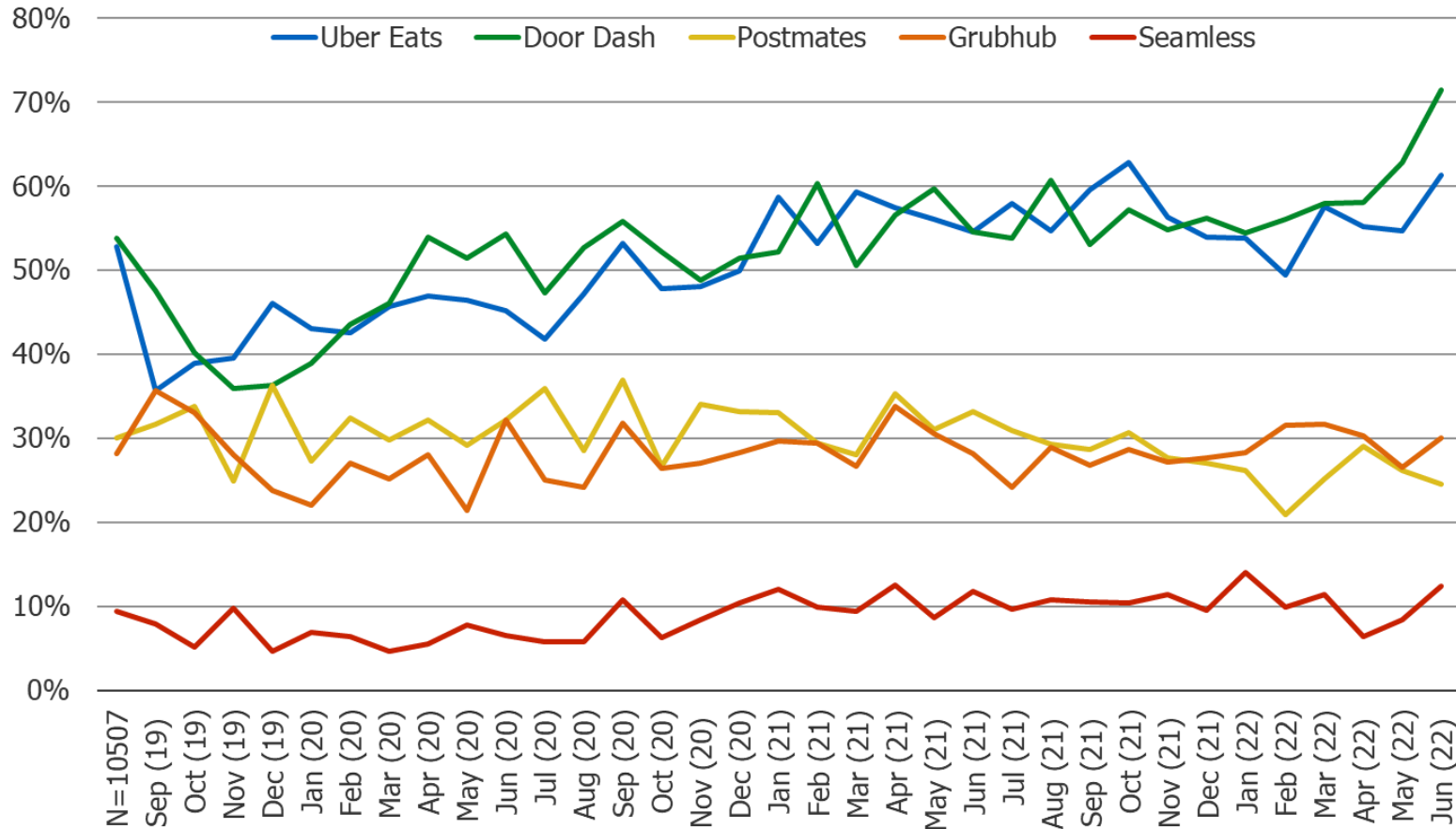
Do you regularly or occasionally use the following food delivery sites/apps?

Posed to all respondents (N = 1,500 per wave)



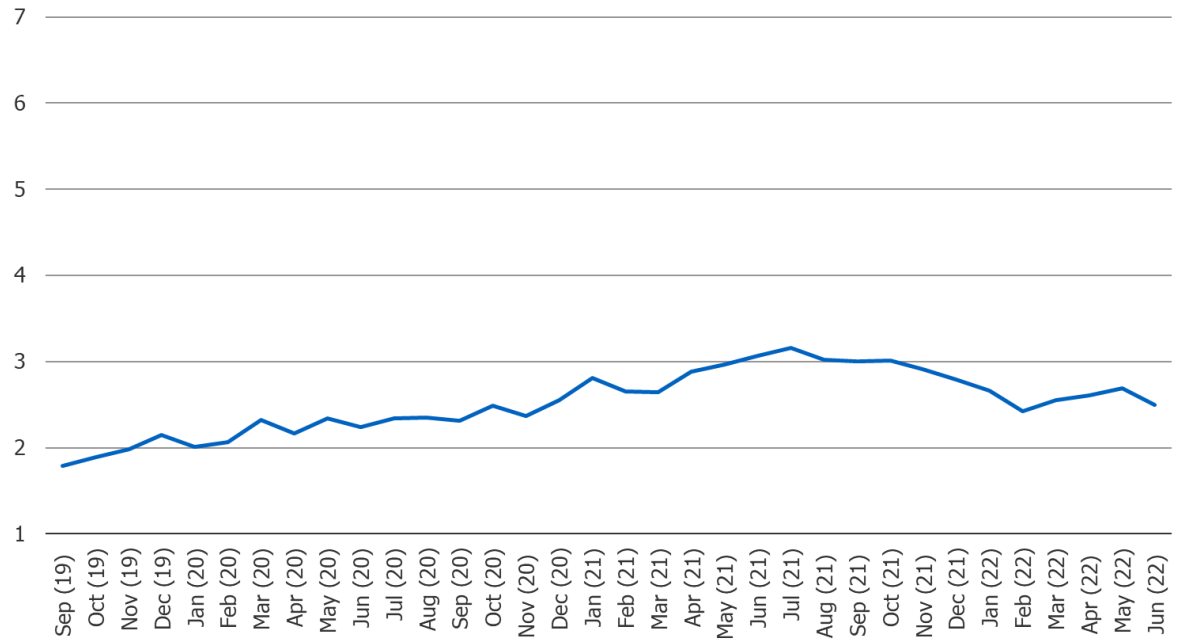
Do you regularly or occasionally use the following food delivery sites/apps?

Cross-Tab: Posed to respondents who use food delivery apps at least weekly



How often do you use food delivery apps?

Posed to all respondents (N = 1,500 per wave)



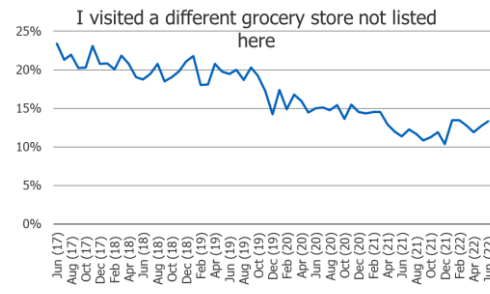
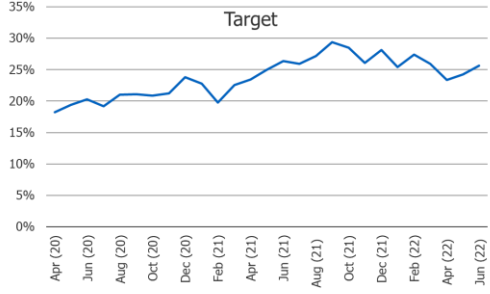
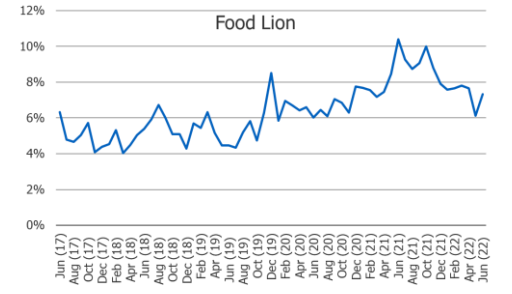
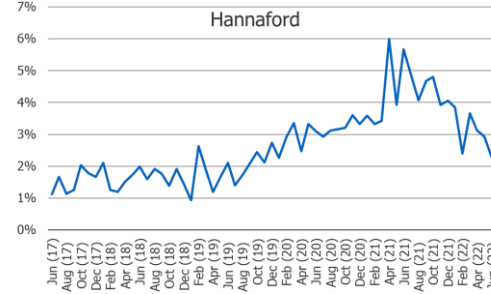
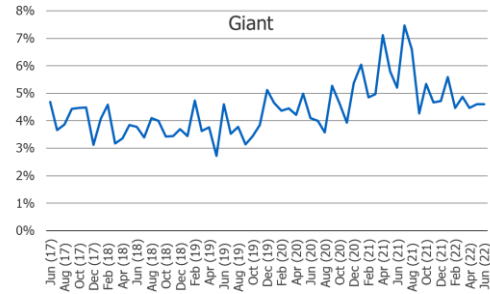
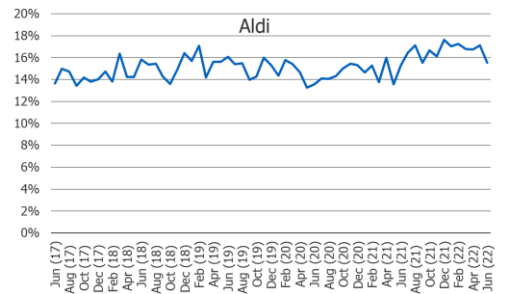
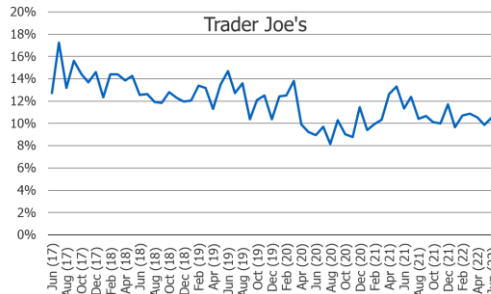
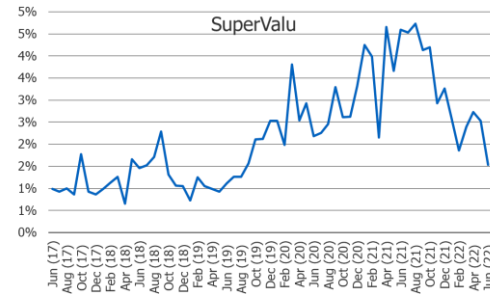
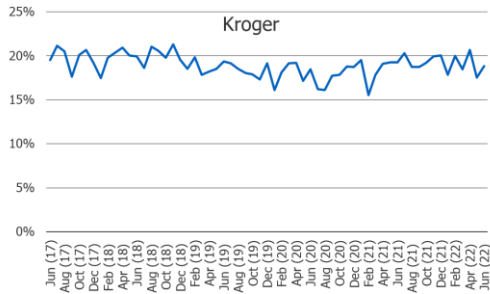
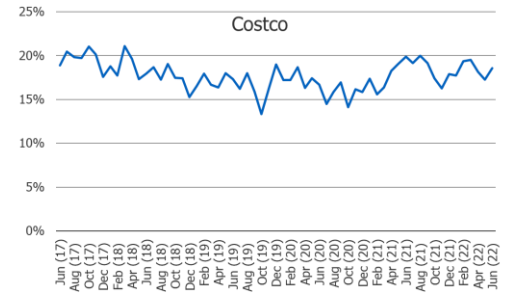
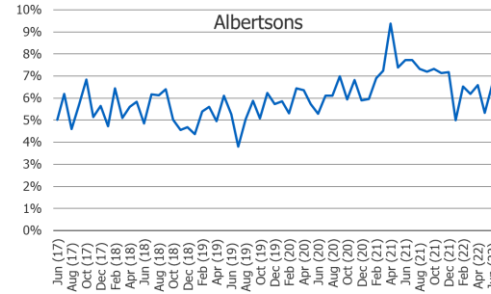
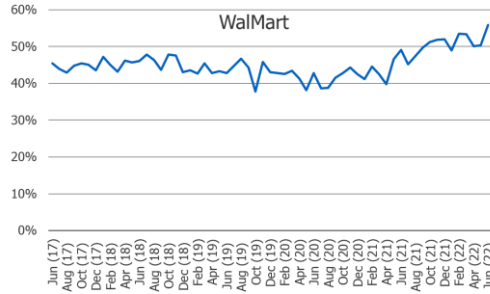
Weighted Average Guide:

- 1 = never
- 2 = less than once per month
- 3 = multiple times per week
- 4 = around once a week
- 5 = multiple times per week
- 6 = around once a day
- 7 = multiples times per day



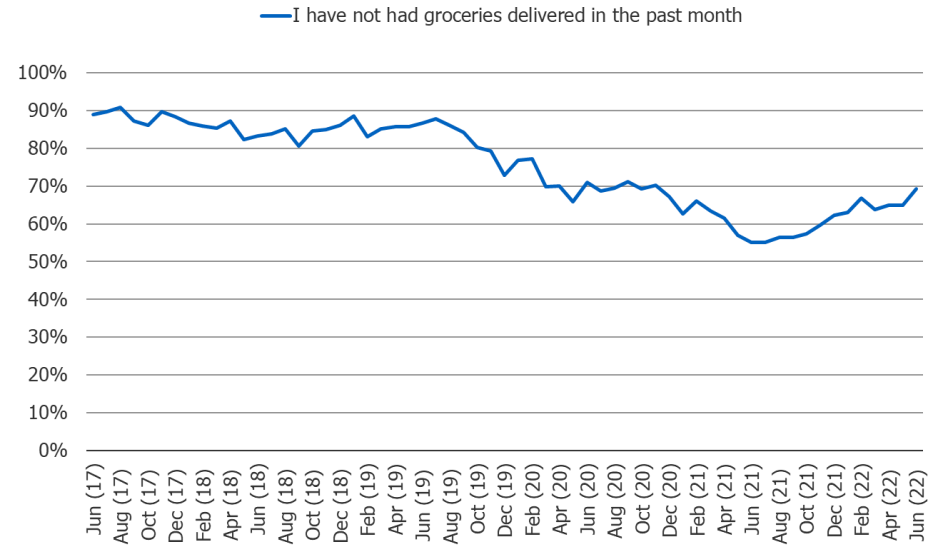
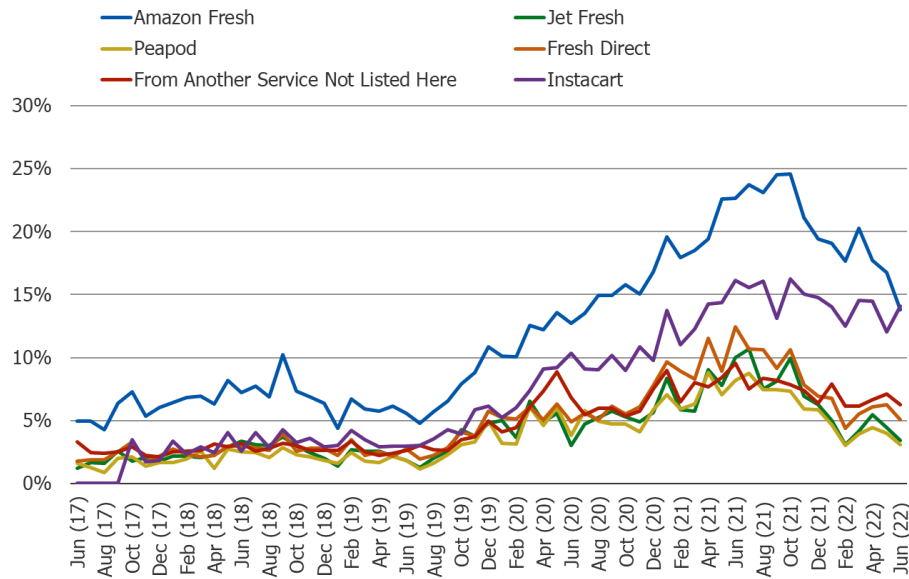
Have you visited any of the following grocery stores in the past month? % Yes

Posed to all respondents (N = 1,500 per wave)



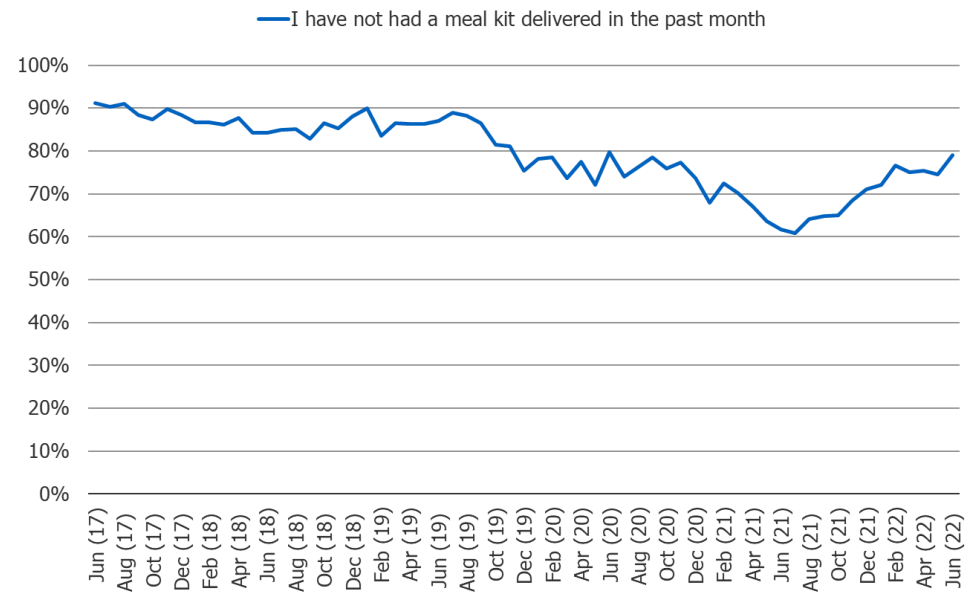
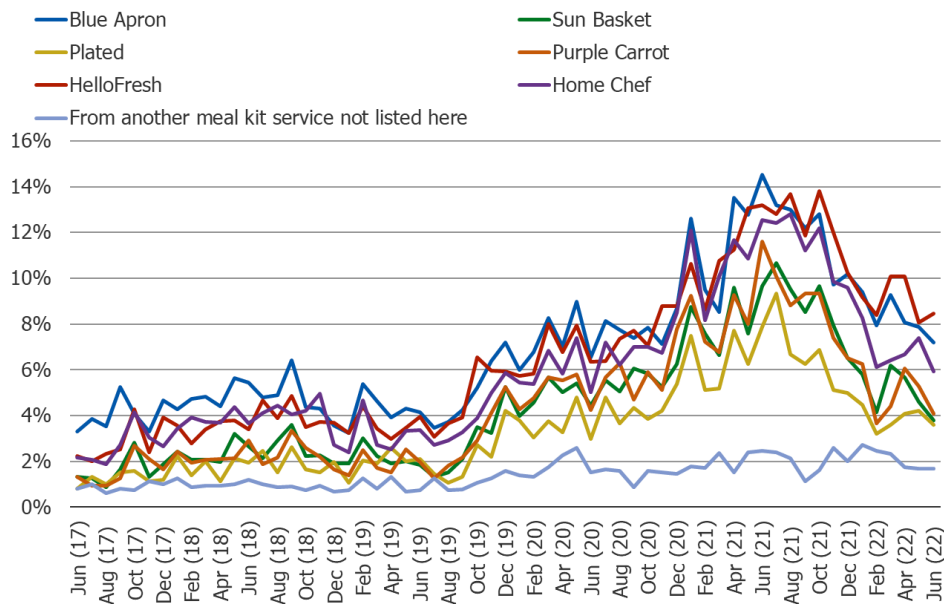
Have you gotten groceries delivered in the past month from any of the following?

Posed to all respondents (N = 1,500 per wave)



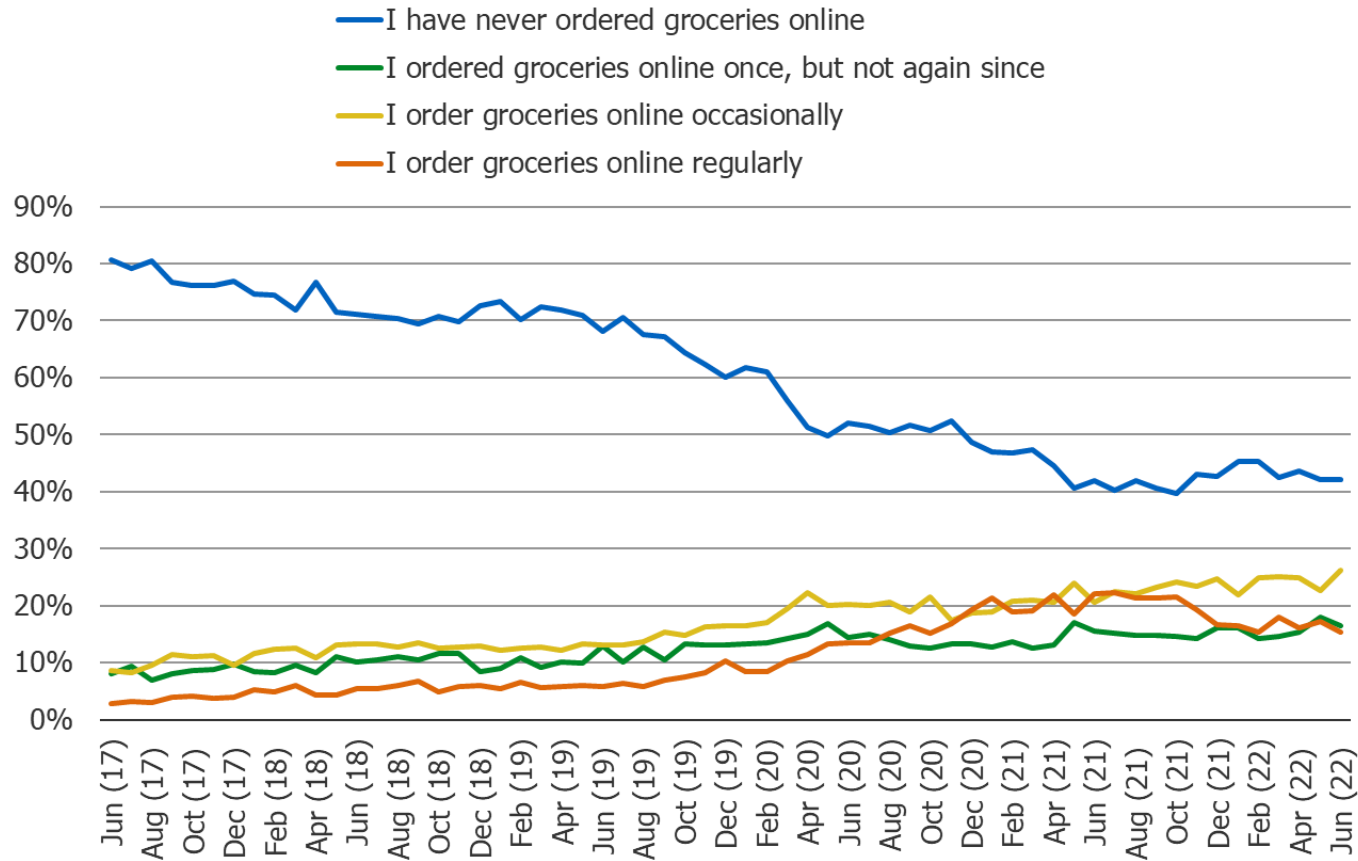
Have you gotten meal kits delivered in the past month from any of the following?

Posed to all respondents (N = 1,500 per wave)



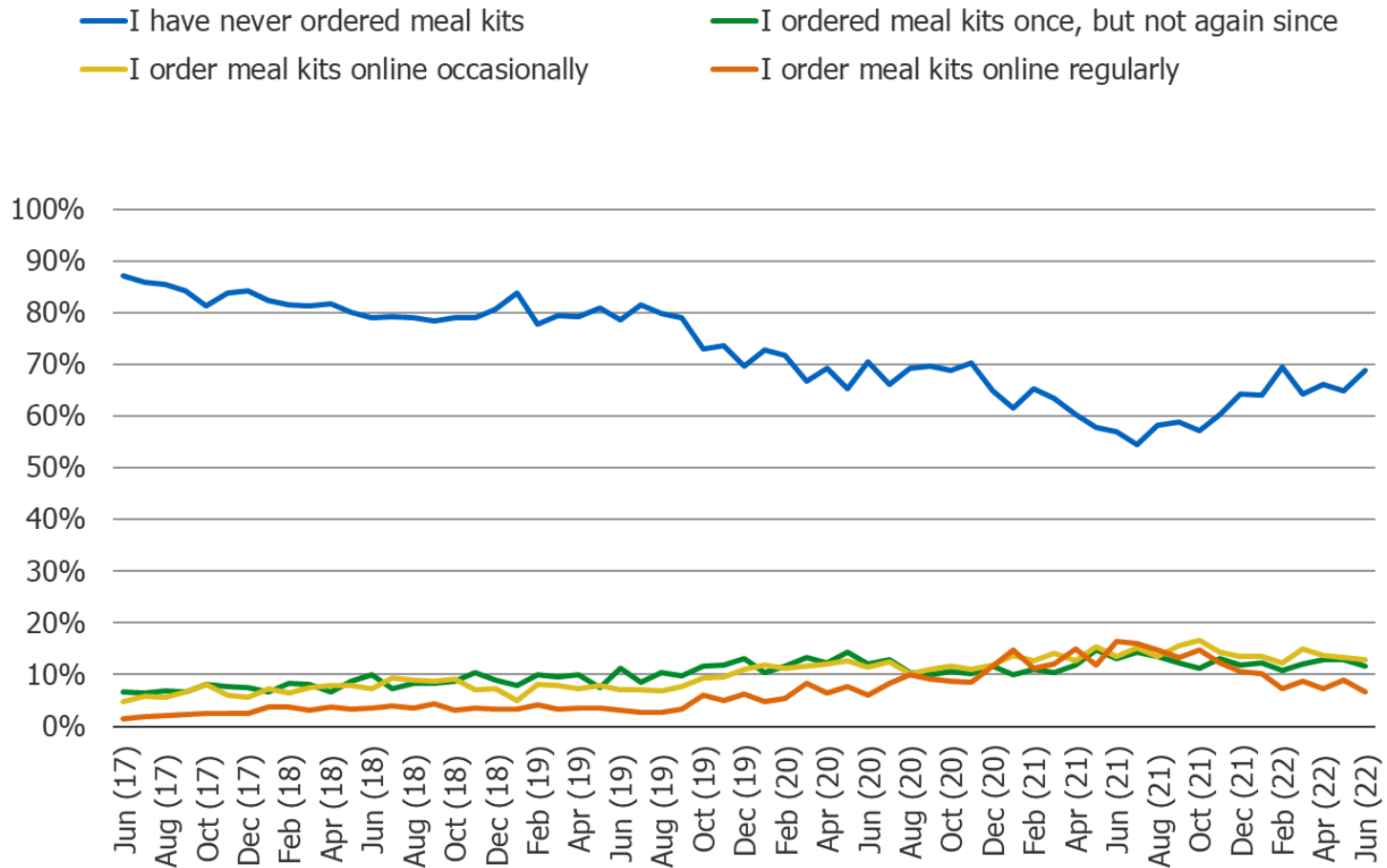
Please characterize your experience with ordering groceries online.

Posed to all respondents (N = 1,500 per wave)



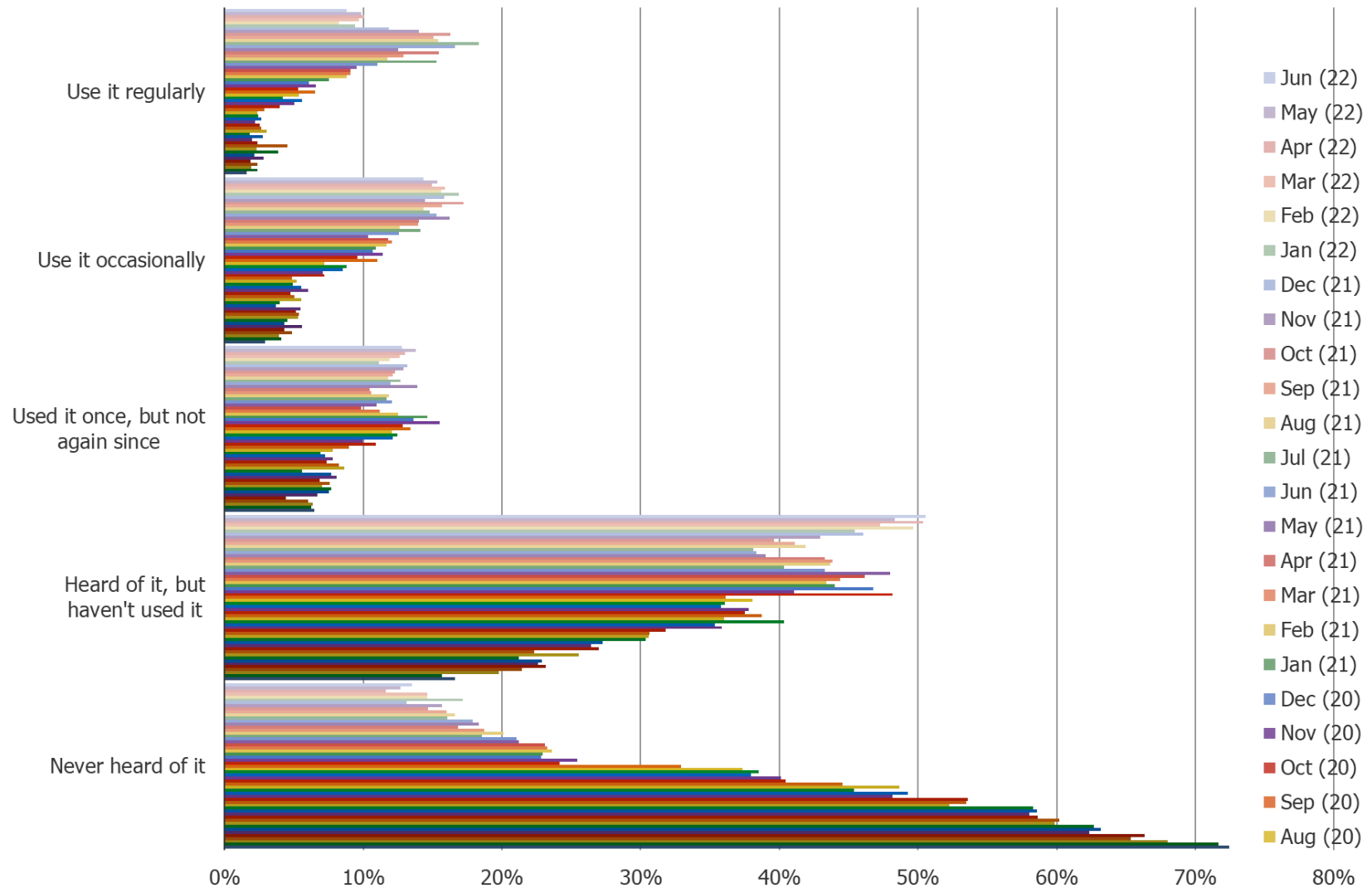
Please characterize your experience with ordering meal kits online.

Posed to all respondents (N = 1,500 per wave)



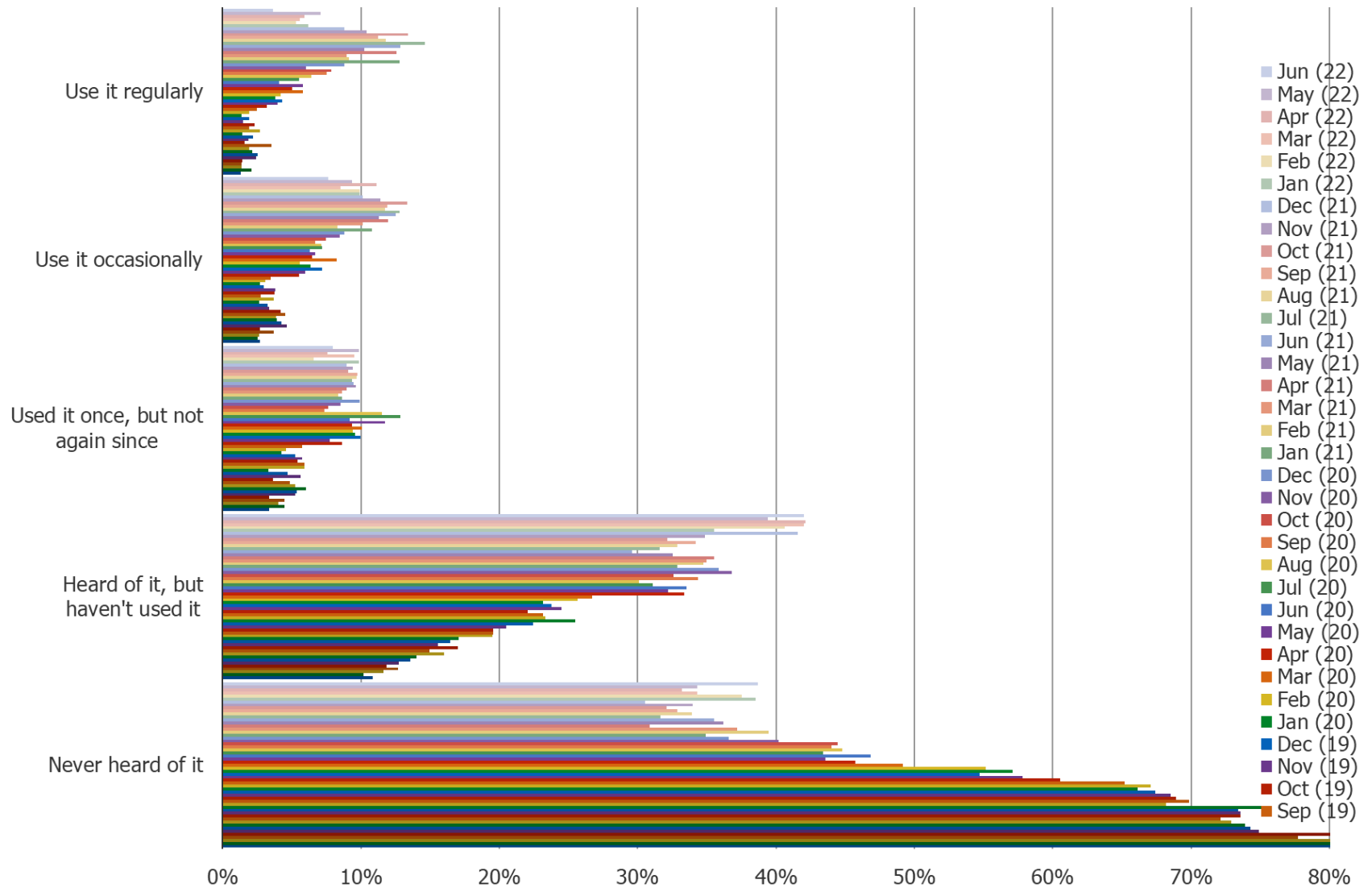
Please characterize your experience with Instacart.

Posed to all respondents (N = 1,500 per wave)



Please characterize your experience with Shipt.

Posed to all respondents (N = 1,500 per wave)

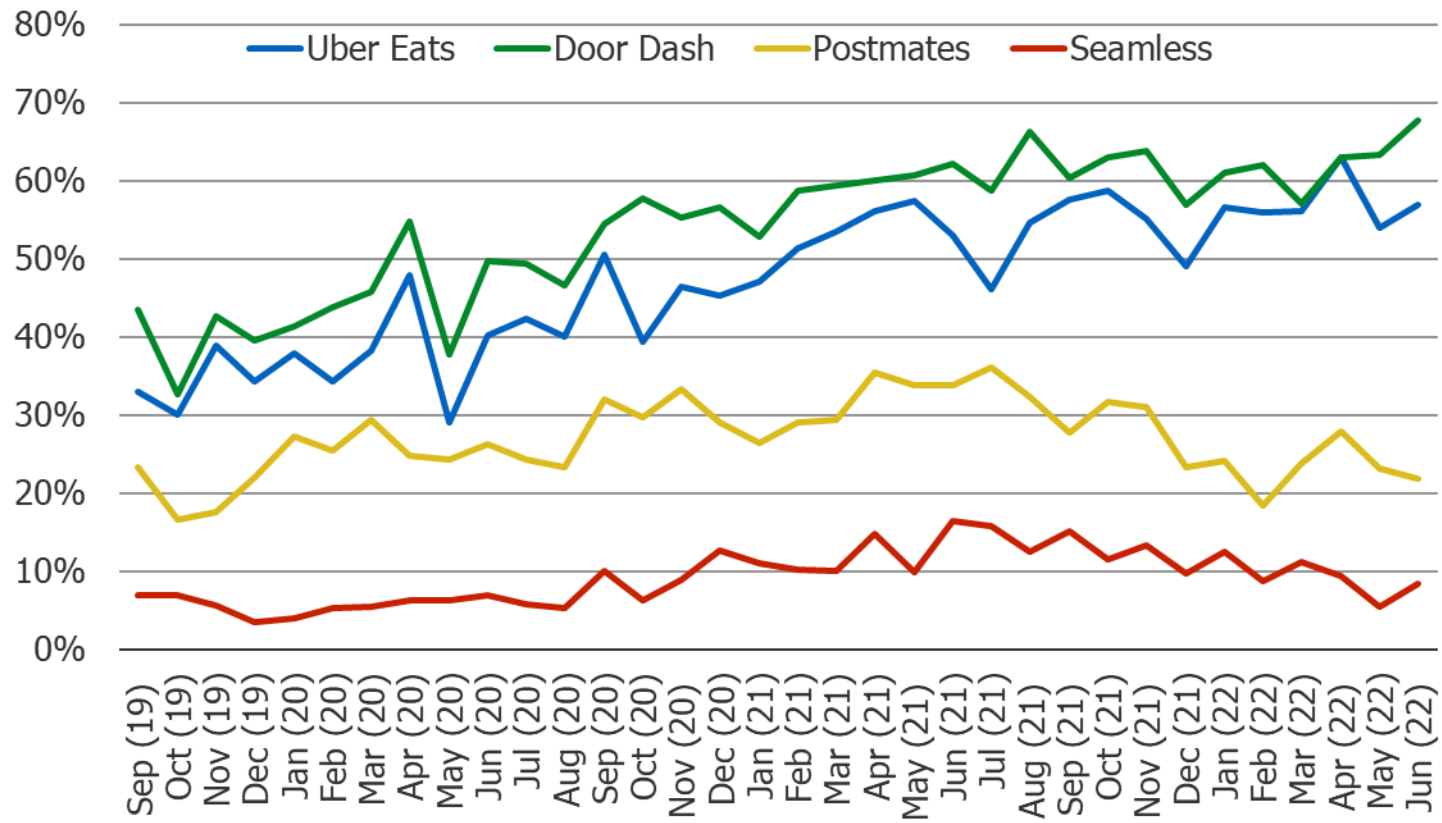


Food Delivery Platform Cross-Over



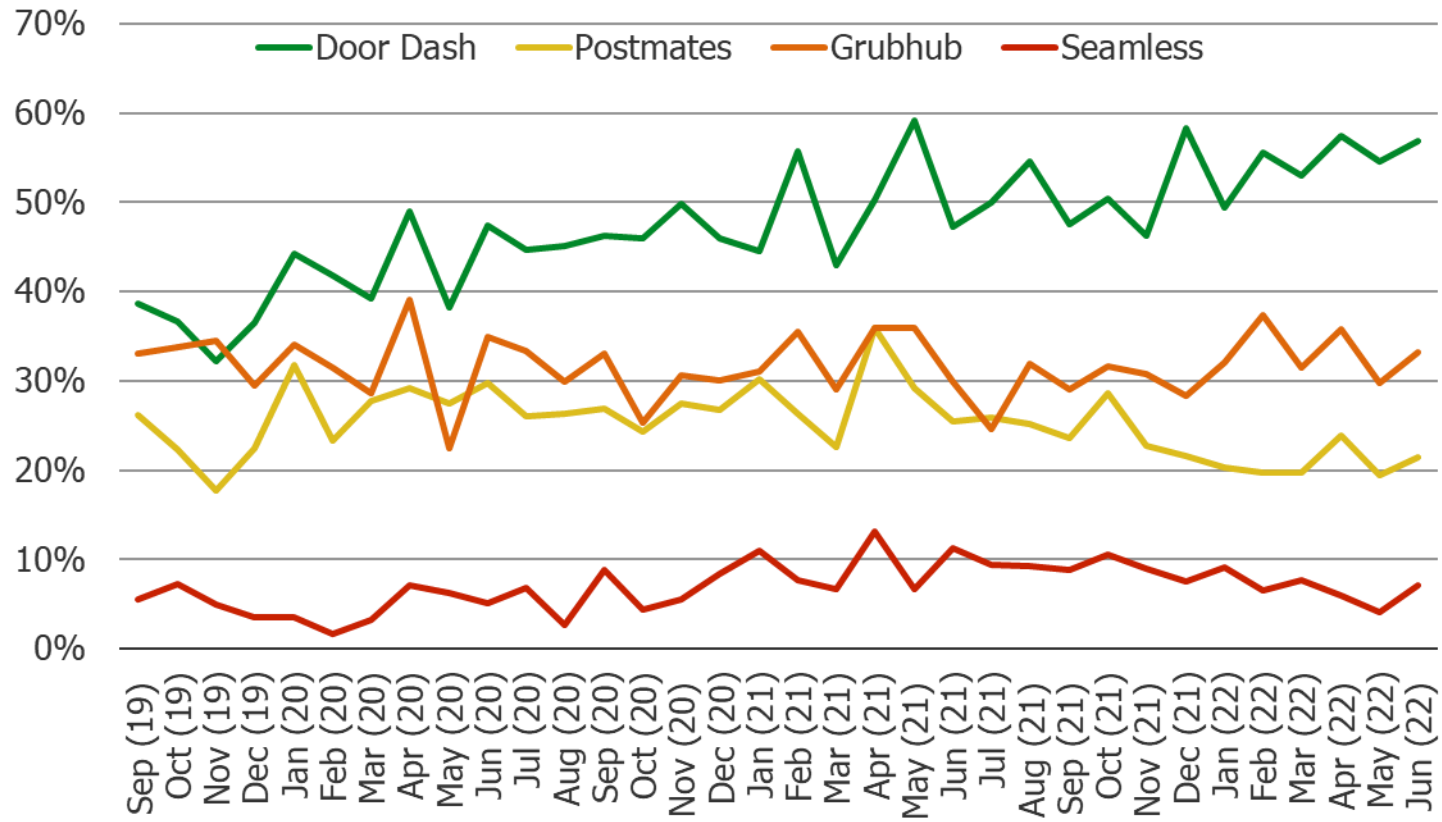
Grubhub Users: ALSO Use the following regularly or occasionally

Posed to respondents who said they use Grubhub regularly or occasionally



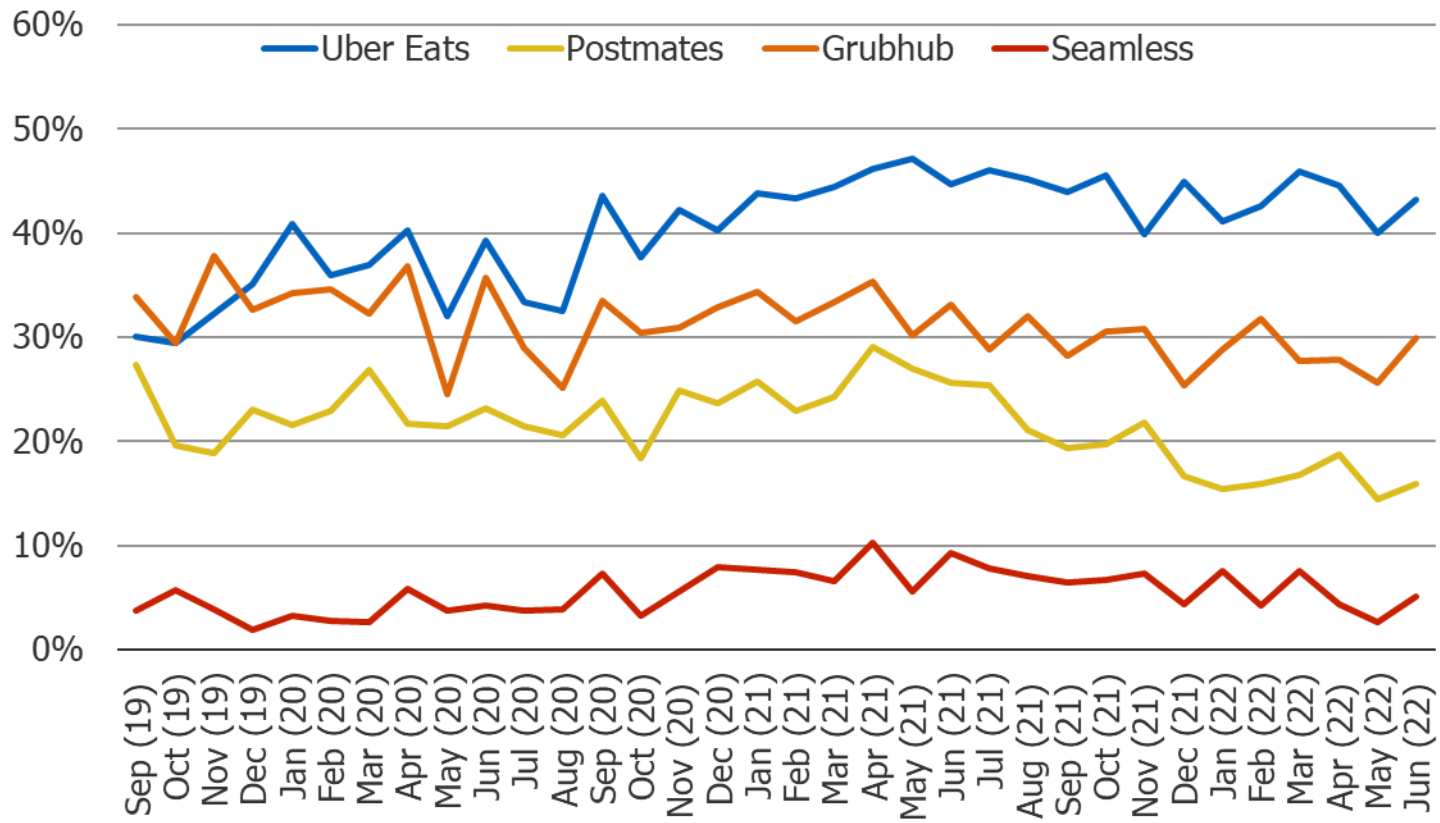
Uber Eats Users: ALSO Use the following regularly or occasionally

Posed to respondents who said they use Uber Eats regularly or occasionally



DoorDash Users: ALSO Use the following regularly or occasionally

Posed to respondents who said they use DoorDash regularly or occasionally



Postmates Users: ALSO Use the following regularly or occasionally

Posed to respondents who said they use Postmates regularly or occasionally

