

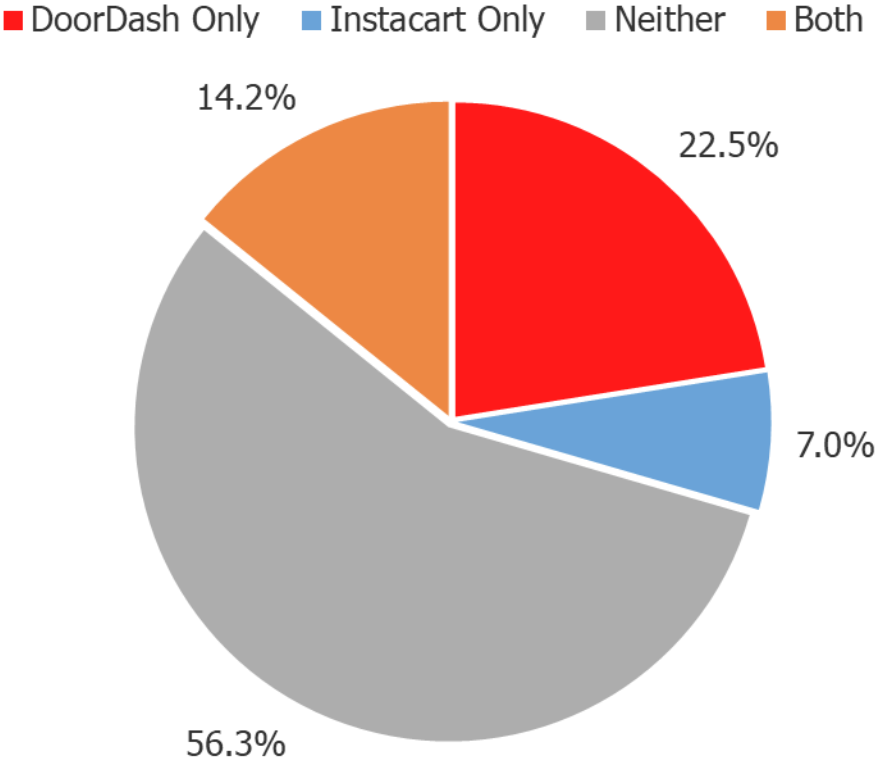
Bespoke Market Intelligence

DASH vs. CART
Consumer Preferences

November 2023

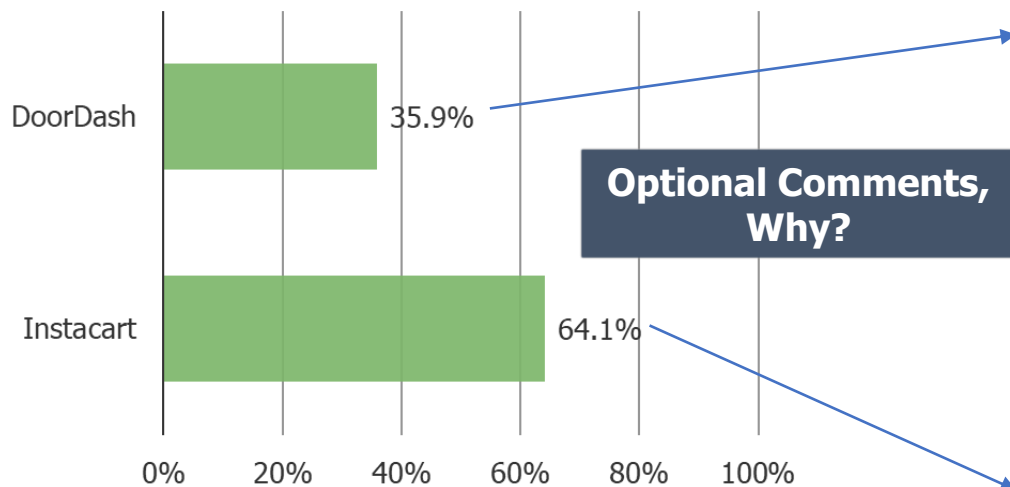
Share of all respondents who use... (N = 10,100+)

Note: Breaking down 10,100+ respondents who completed our survey, balanced to US census...



Among respondents who use both, which do you prefer (and why)? N = 1,438

Note: A larger % of respondents use DoorDash ONLY compared to the share of respondents who use Instacart ONLY (from prior slide). This slide isolates respondents who have used BOTH DoorDash AND Instacart in the past year for grocery delivery to understand which they prefer and why...



ChatGPT

Based on the responses provided, the top reasons why people prefer DoorDash over Instacart include:

1. **Speed and Reliability:** Respondents frequently cite faster service and reliability as key factors, with DoorDash being seen as quicker both in delivery times and app navigation.
2. **Customer Service and User Experience:** Many users feel DoorDash offers better customer service and find the app more user-friendly. They also appreciate the loyalty rewards for being a Dasher.
3. **Cost-Effectiveness:** There are multiple mentions of DoorDash being more affordable, offering better deals, and having less markup on prices compared to Instacart, as well as not having hidden fees.

ChatGPT

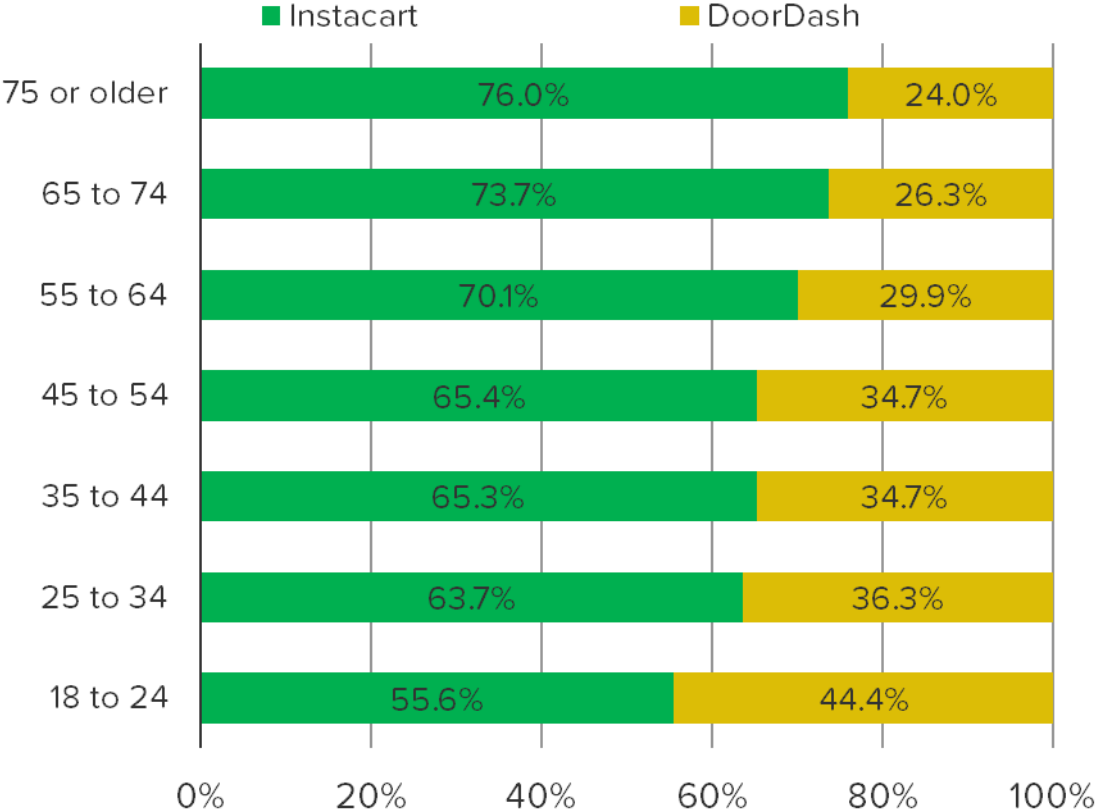
Based on the provided responses, the top three reasons why people prefer Instacart over DoorDash are:

1. **Greater Selection and Variety:** Respondents favor Instacart for the wide variety of stores and products available, including specific mentions of grocery options and their association with stores like Costco and Kroger.
2. **Convenience and Time-Saving:** Customers find Instacart very convenient, highlighting that it saves them time. The platform is noted for being easy to use and for providing fast delivery, which contributes to its convenience factor.
3. **Reliability and Customer Service:** Instacart is perceived as reliable, with shoppers that are responsive and provide high-quality service. The company's customer support is also praised, and there is an appreciation for the professional manner in which orders are handled, including the handling of returns for unsatisfactory products.

Instacart vs. DoorDash | Demographics

Which do you prefer for ordering grocery and convenience items?

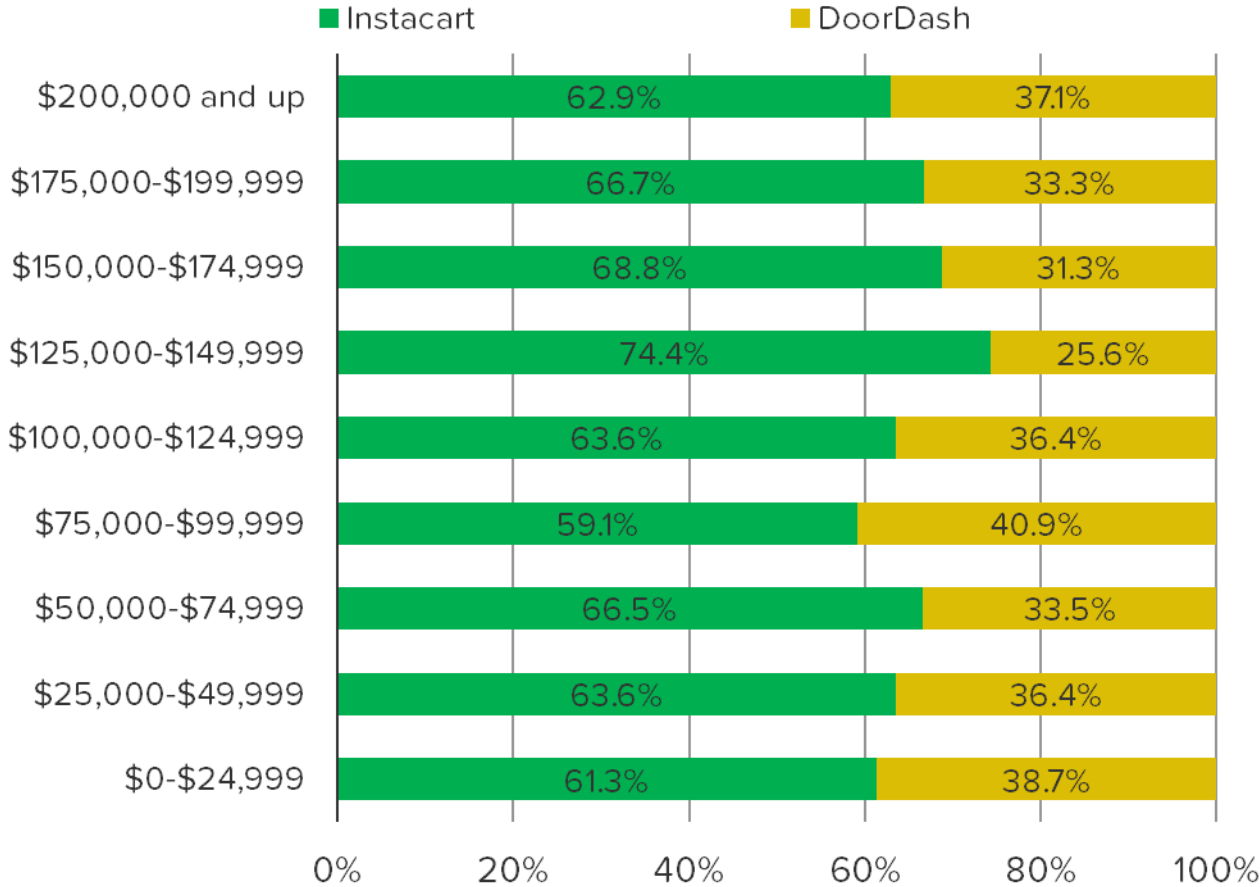
Posed to all respondents who have used BOTH Instacart AND DoorDash in the past year, cross-tabbed by income.



Instacart vs. DoorDash | Demographics

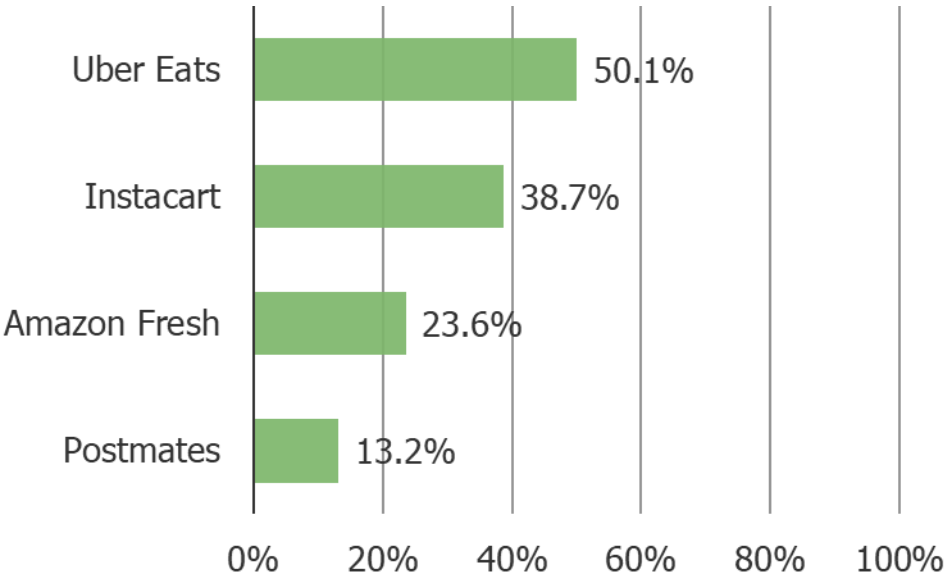
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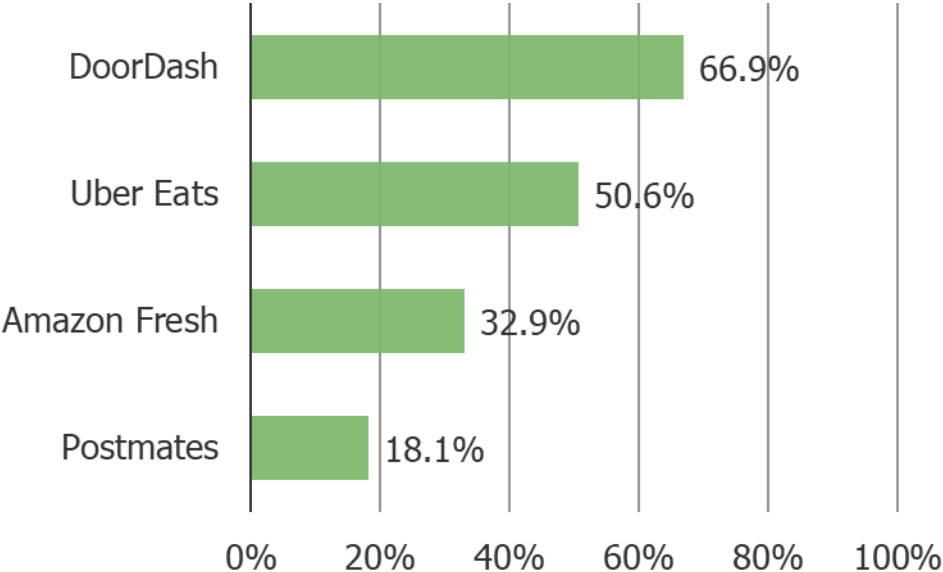
Usage Crossover:

Used DoorDash in the Past Year (For Grocery or Convenience) / Has Also Used in the Past Year...



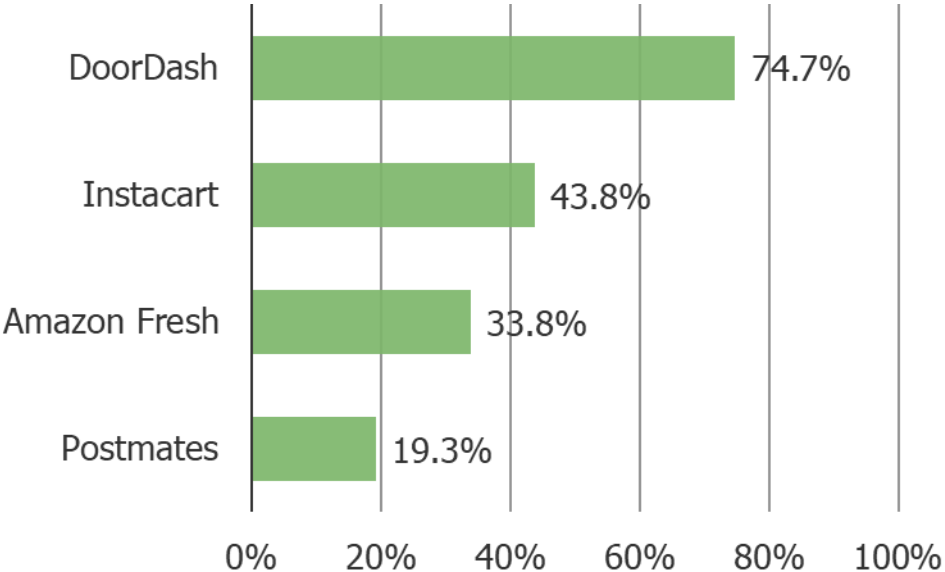
Usage Crossover:

Used Instacart in the Past Year (For Grocery or Convenience) | Has Also Used in the Past Year...



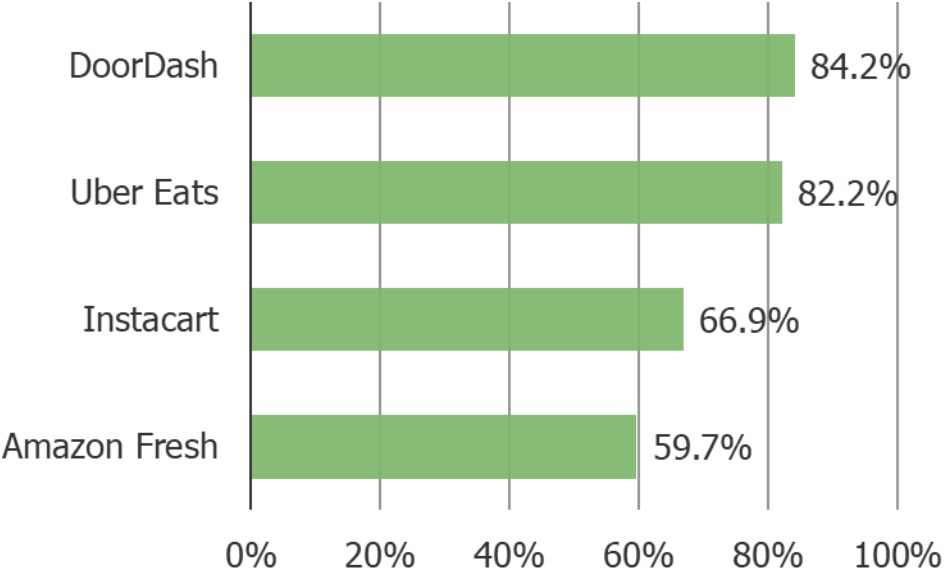
Usage Crossover:

Used Uber Eats in the Past Year (For Grocery or Convenience) | Has Also Used in the Past Year...



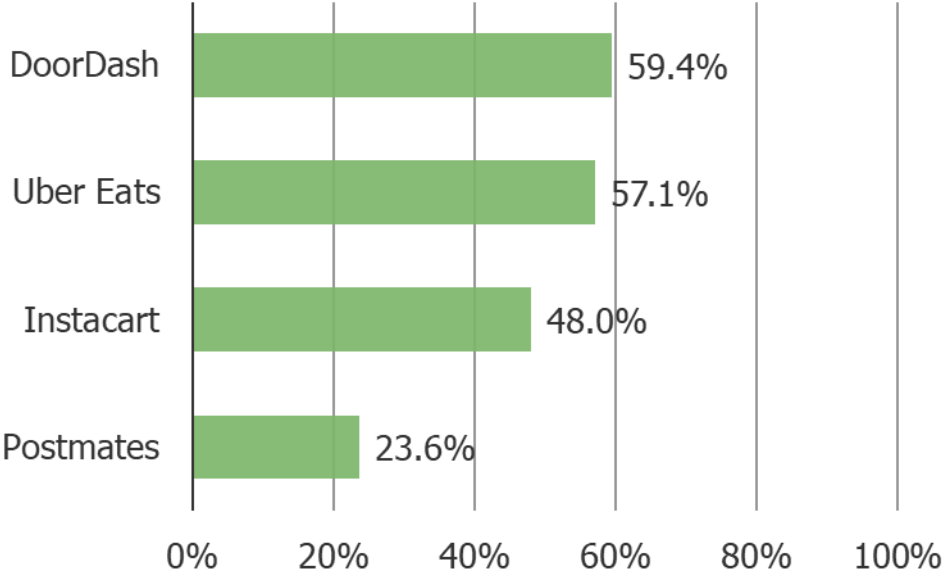
Usage Crossover:

Used Postmates in the Past Year (For Grocery or Convenience) | Has Also Used in the Past Year...



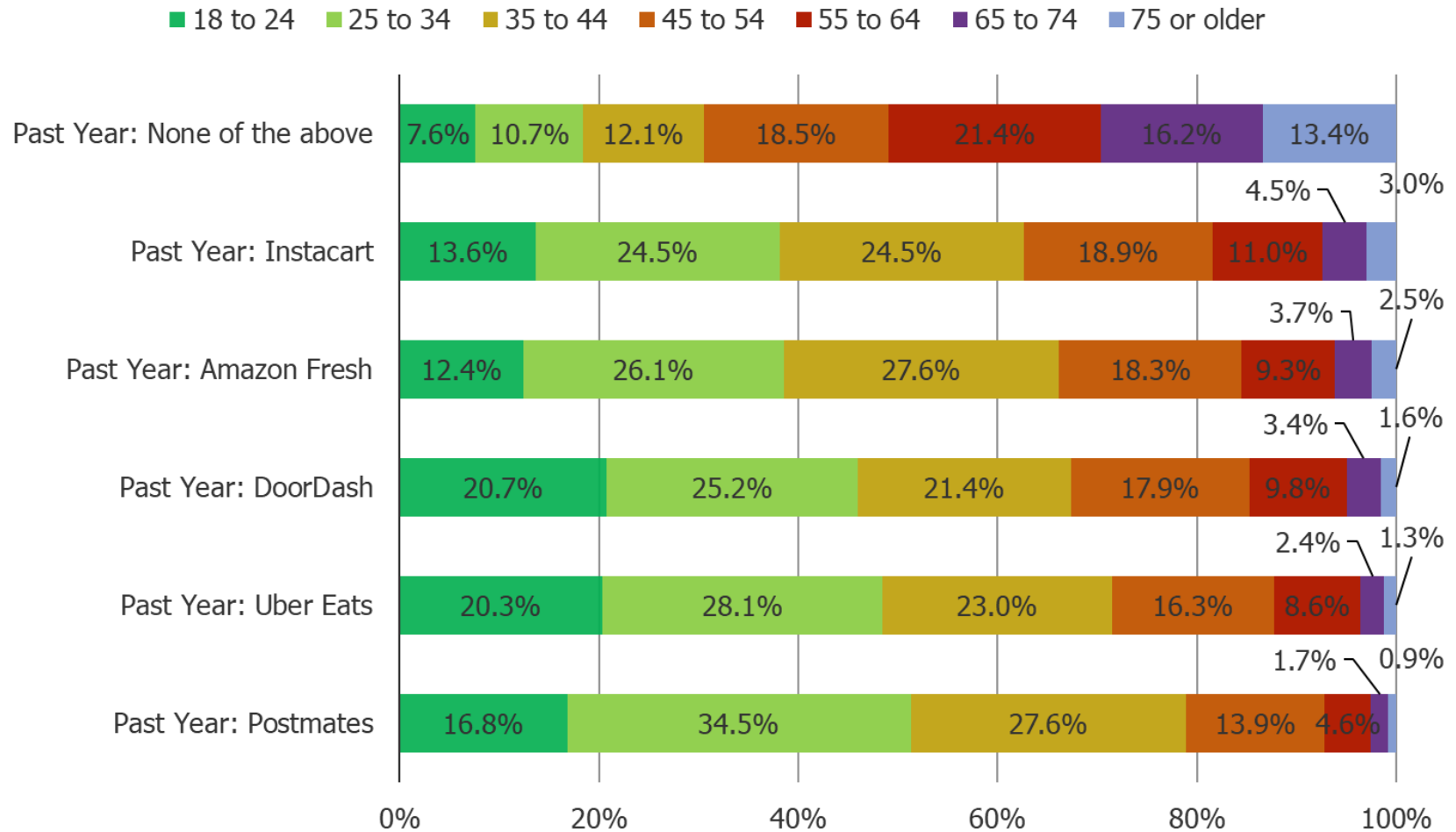
Usage Crossover:

Used Amazon Fresh in the Past Year (For Grocery or Convenience) / Has Also Used in the Past Year...



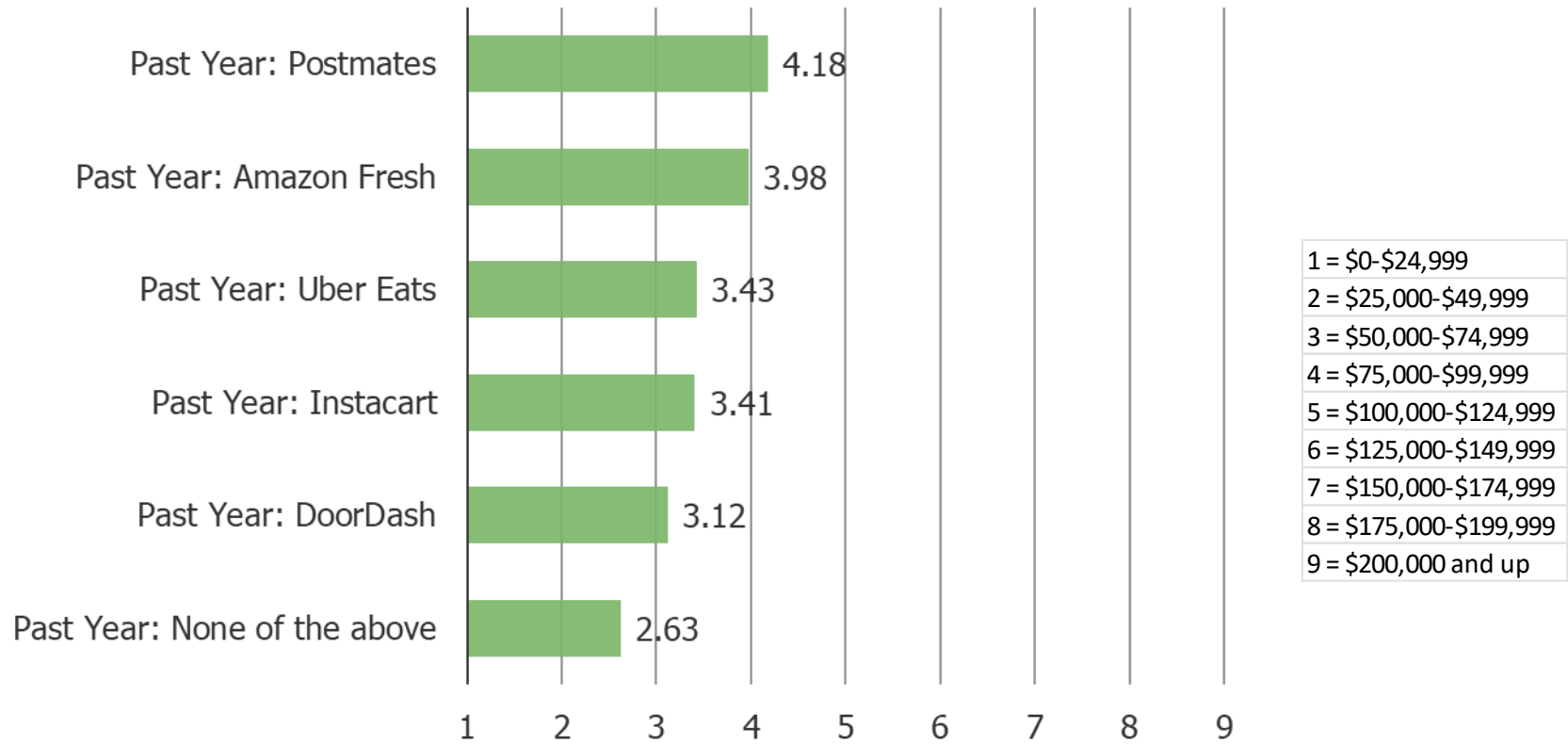
Demographics

Age Breakdowns / Respondents who used each of the following for grocery in the past year...



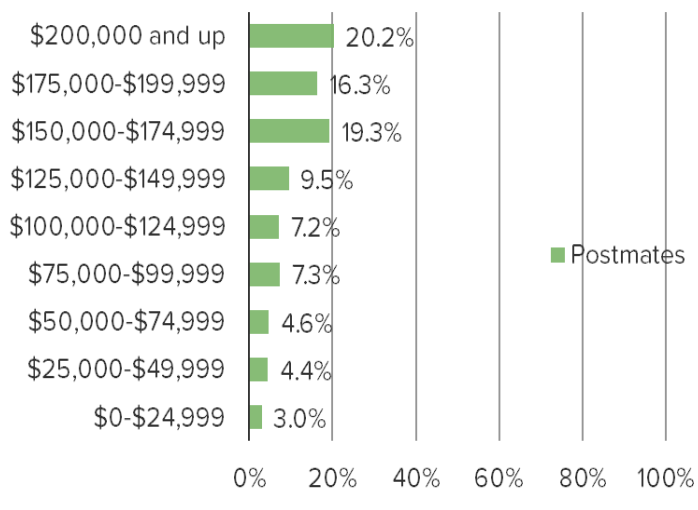
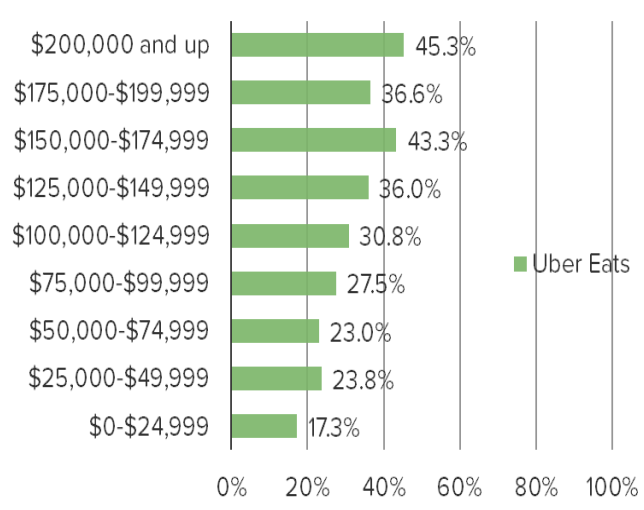
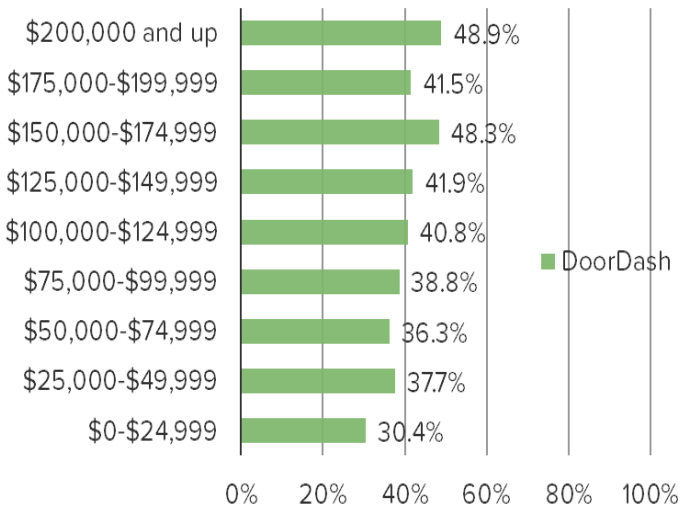
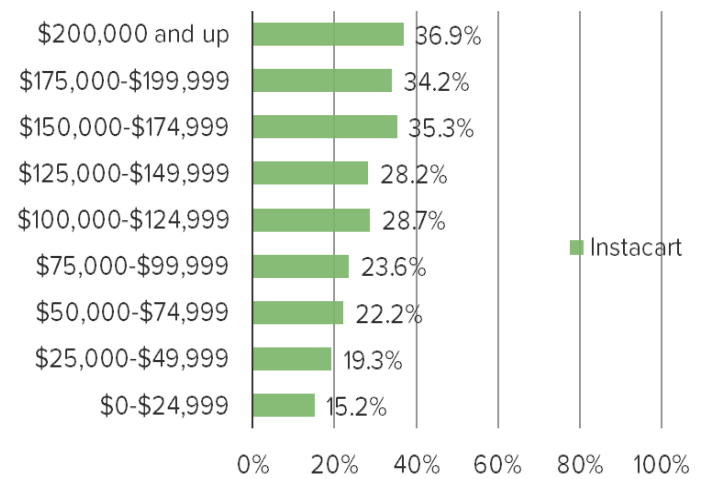
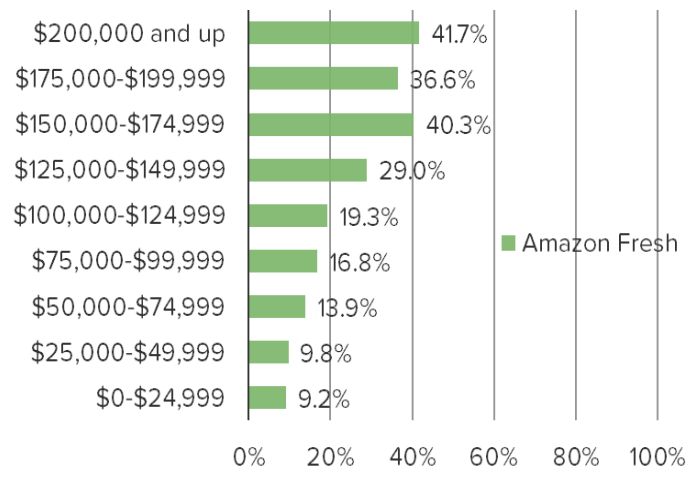
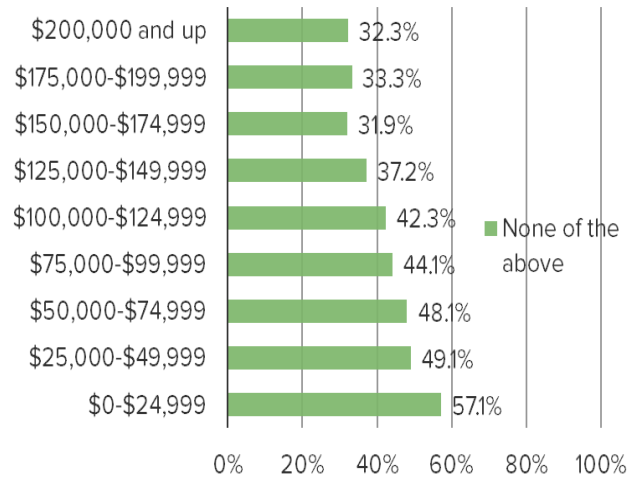
Demographics

Income Weighted Averages / Respondents who used each of the following for grocery in the past year...



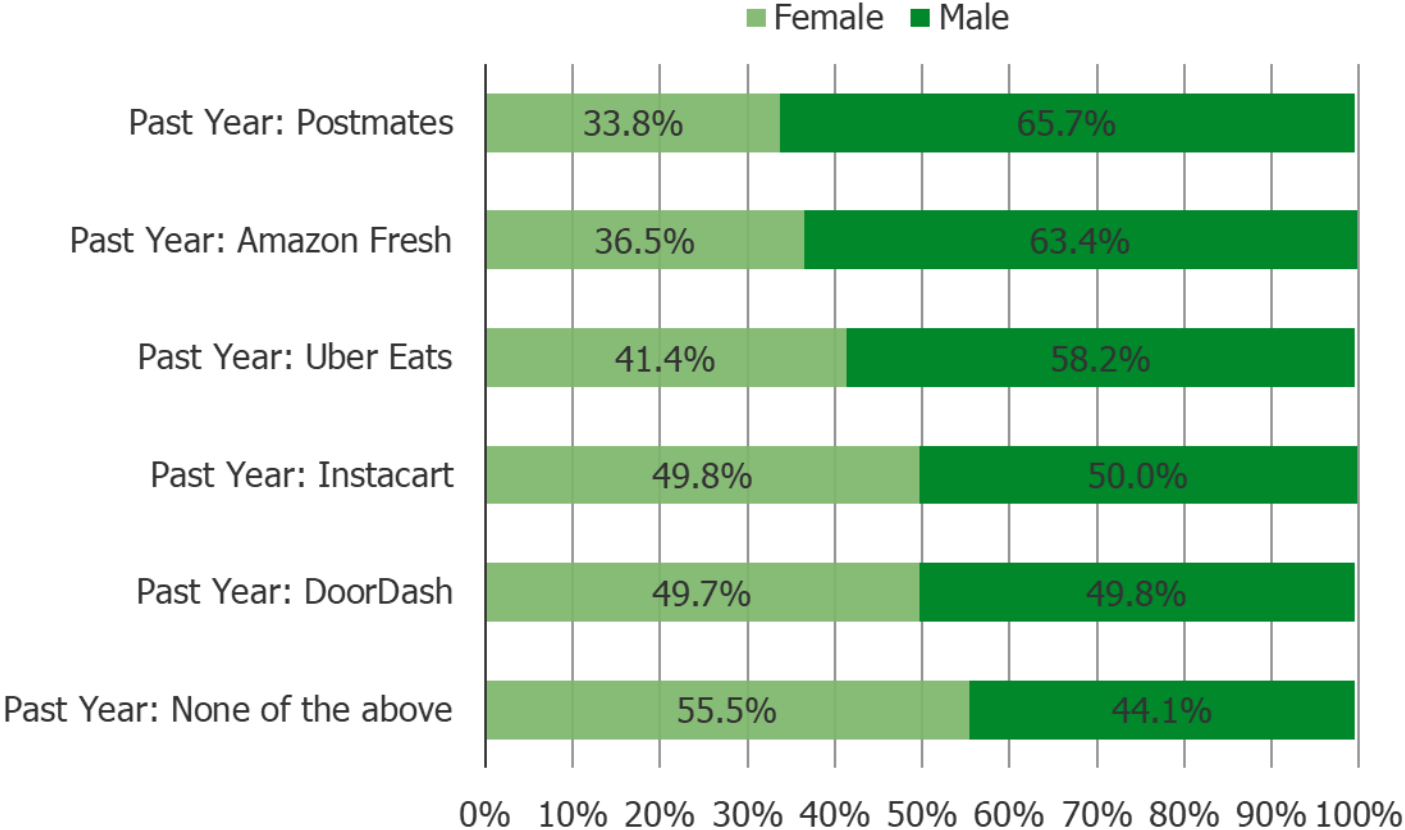
Demographics

Income Breakdowns / Respondents who used each of the following for grocery in the past year...



Demographics

Gender Breakdowns / Respondents who used each of the following for grocery in the past year...



Demographics

Type of Area They Live In | Respondents who used each of the following for grocery in the past year...

