

# Meal Delivery Services in the Age of COVID-19: What Winning Looks Like

May 2020  
Quarantined  
Virtual Insights  
Conference  
*hosted by:*



**BILL McDOWELL**  
*COO*  
***Accelerant Research***



# QVIC GROUND RULES

- At the mercy of the tech
- Be respectful
- Network/Engage/Interact

#QVIC2020



# COMPREHENSIVE CATEGORY STUDY

## A&U Meets Ethnography



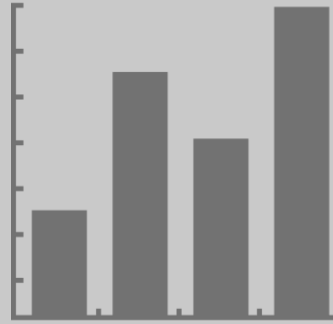
# COMPREHENSIVE CATEGORY STUDY

## A&U Meets Ethnography

Behavioral  
Analytics



Quantitative  
Research



n=1,200  
Category  
Consumers

Qualitative  
Research



60-minute  
Show-and-Tell  
Ethnographies

# COMPREHENSIVE CATEGORY STUDY

METHODOLOGY



FINDINGS



IMPLICATIONS



# Behavioral/ Usage Data Feeds

**AGORA USA**



**Finances**



**Online  
Shopping**



**Itemized  
Purchases**



**Travel**



**Usage  
Diaries**



**Social  
Media**



**Geolocation**



**Retail  
Habits**



**Media  
Consumption**



**Credit**



**Others**



## Implications: What to do with these data

- Address customer database or loyalty member blind spots
- Advocacy & immunity
- Less reliance on self-reported survey responses
- Validation of research participants
- True share of wallet

2020...  
it's only  
eff'n May

1<sup>st</sup> w/o March



State-by-state shutdowns



1<sup>st</sup> w/o January

Leap Day

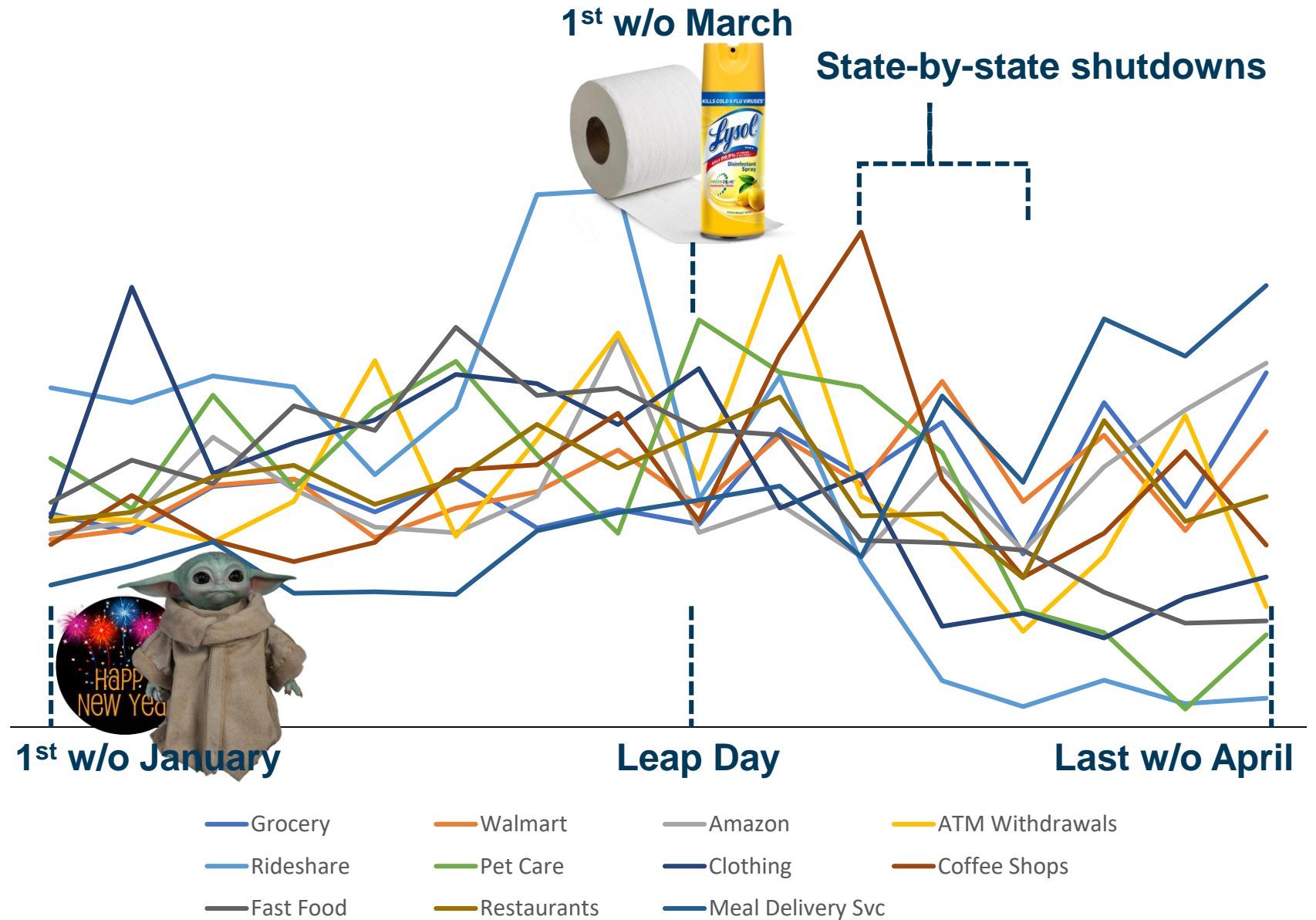
Last w/o April



Source: Accelerant Research's AGORA USA Panel



# Americans' Share of Weekly Expenditures Jan-Apr 2020



Source: Accelerant Research's AGORA USA Panel

# Losing vs. Winning in the age of COVID

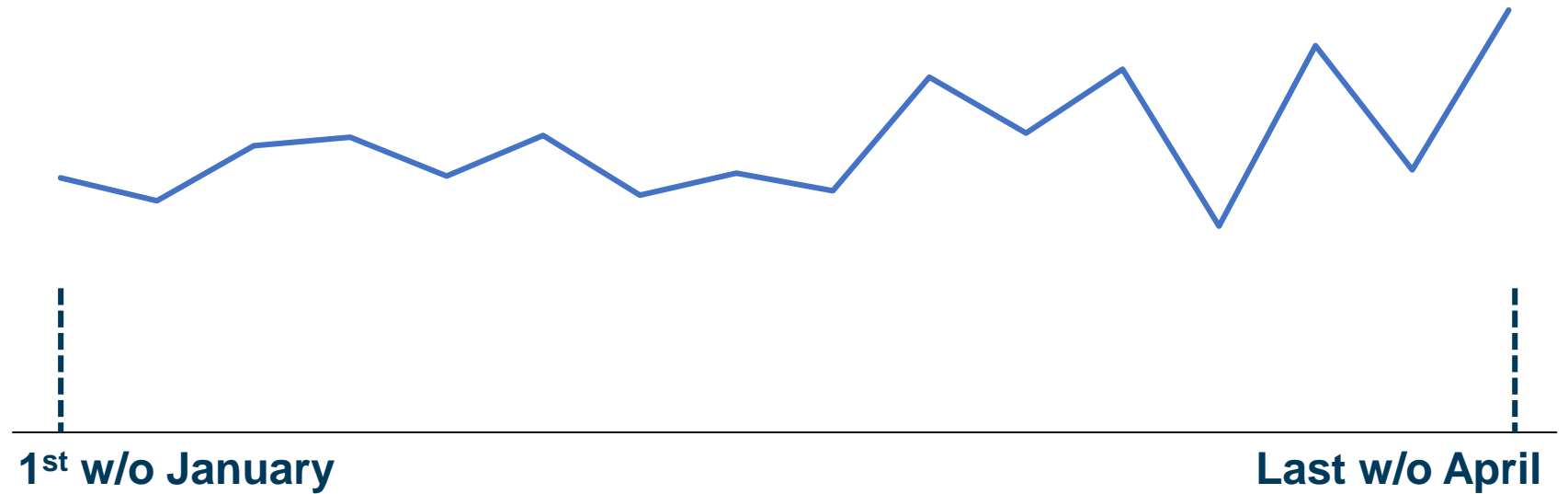


# Grocery Stores

1<sup>st</sup> w/o March



State-by-state shutdowns

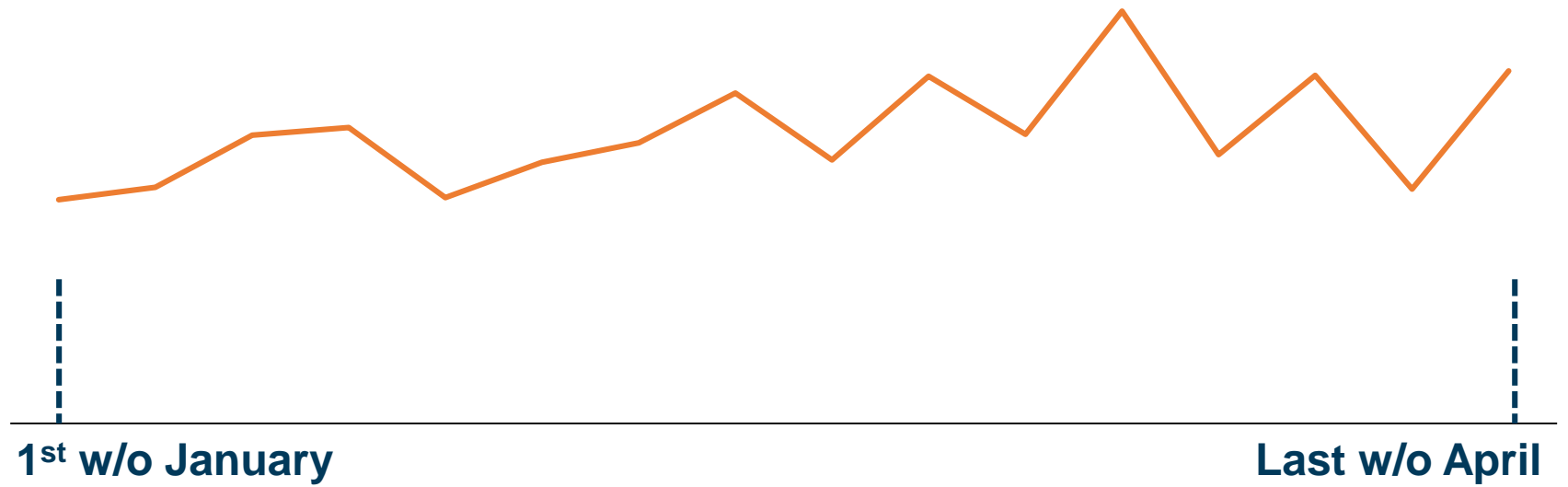




1<sup>st</sup> w/o March



State-by-state shutdowns





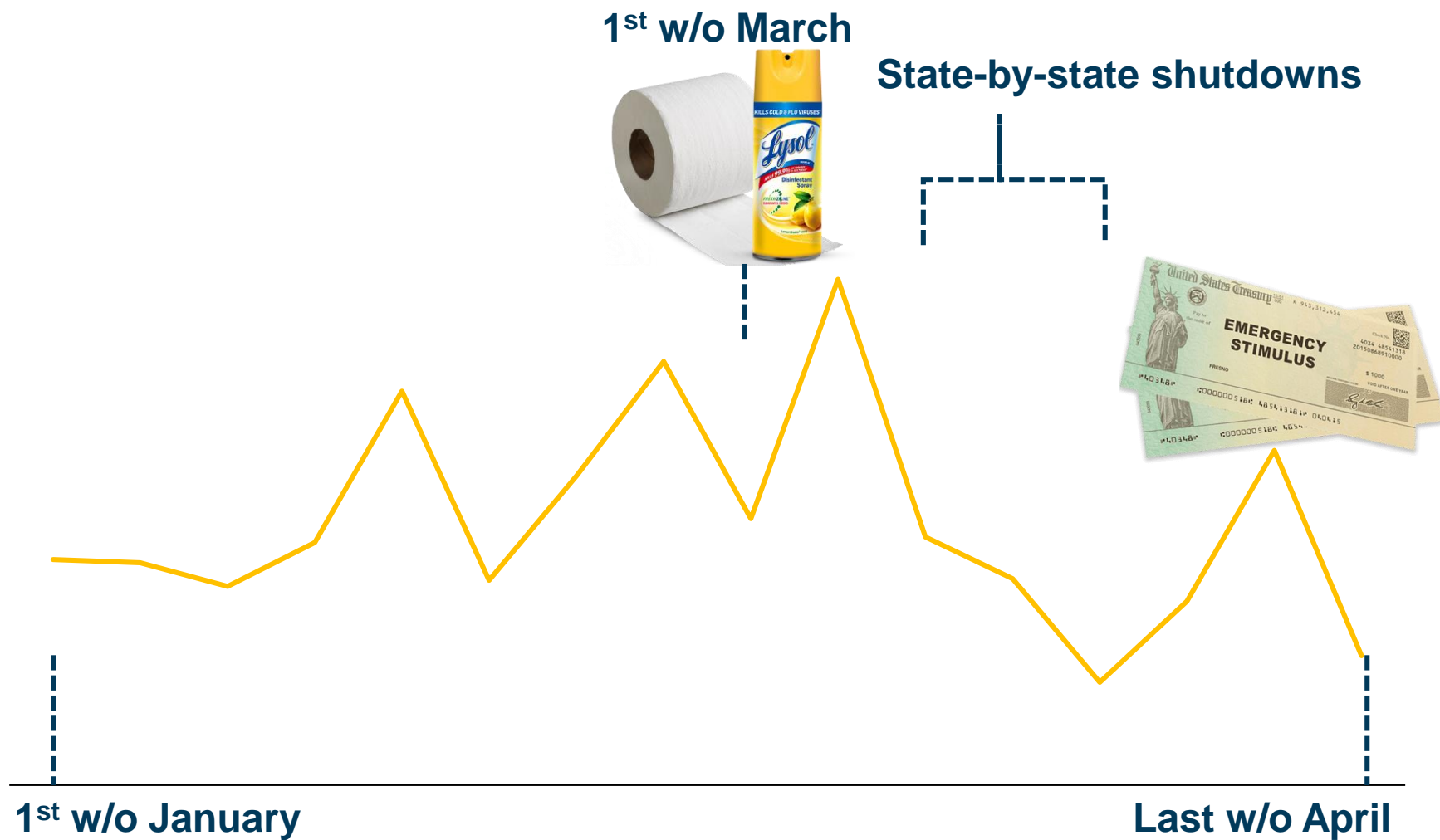
1<sup>st</sup> w/o March



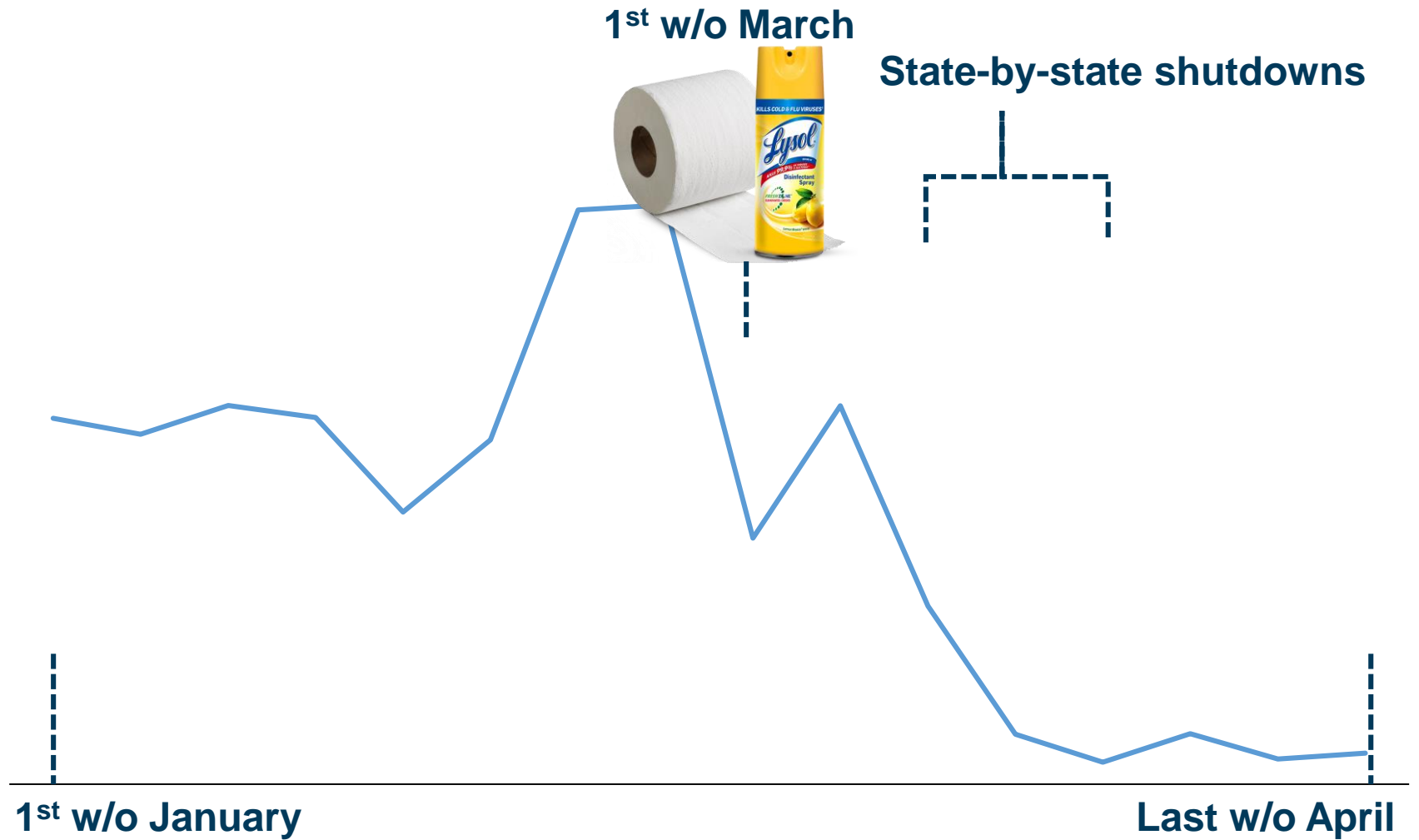
State-by-state shutdowns



# ATM Withdrawals

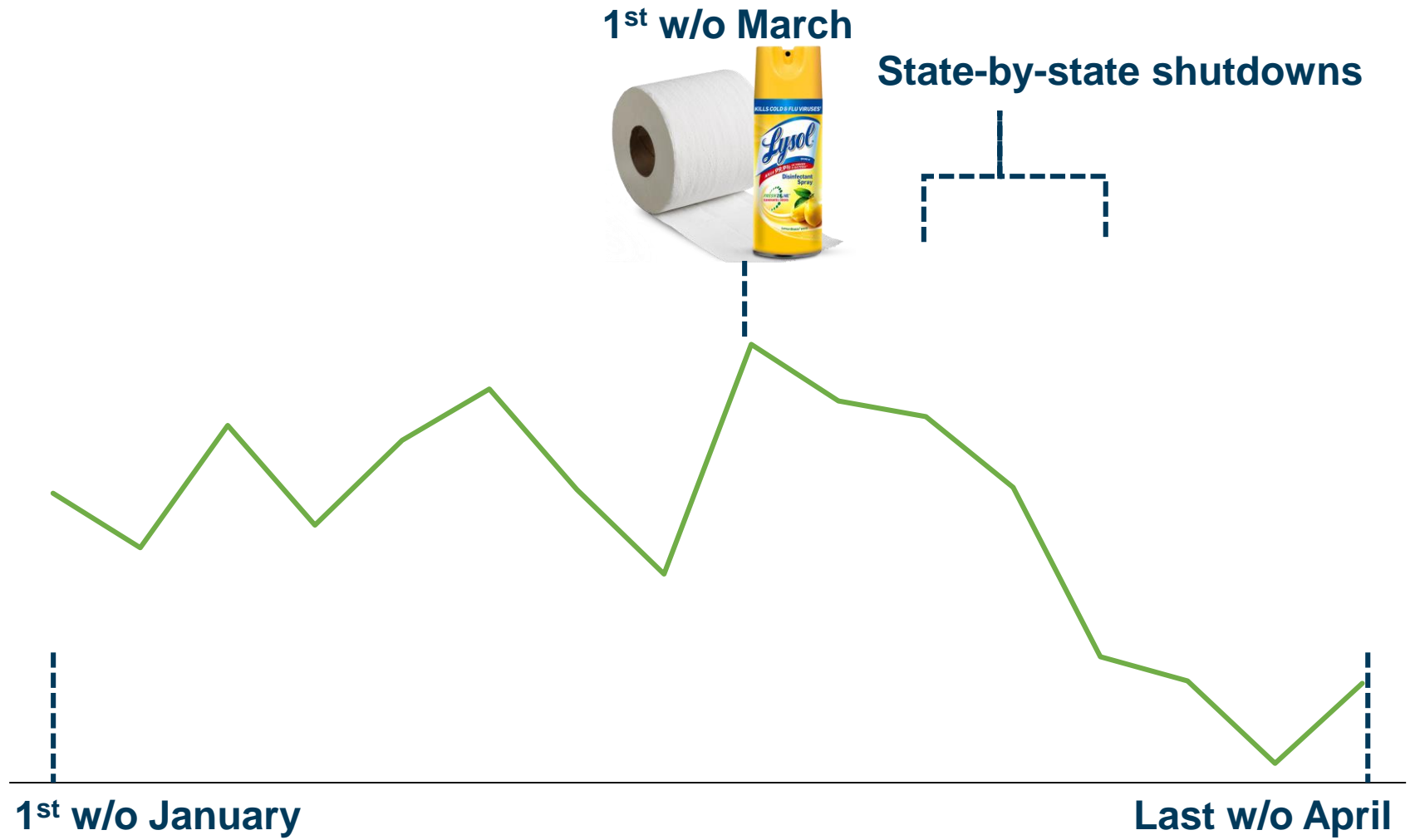


# Rideshare Services

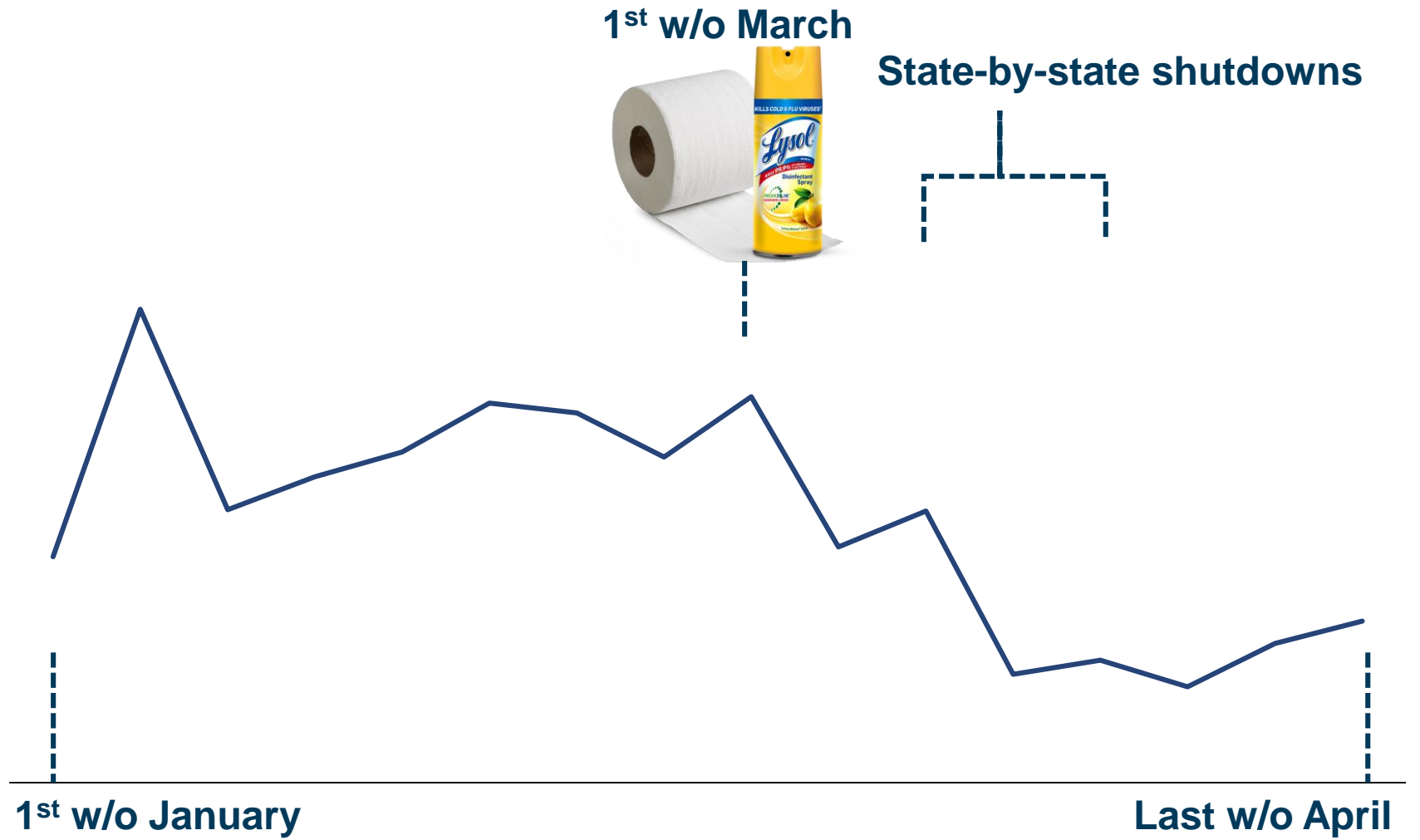




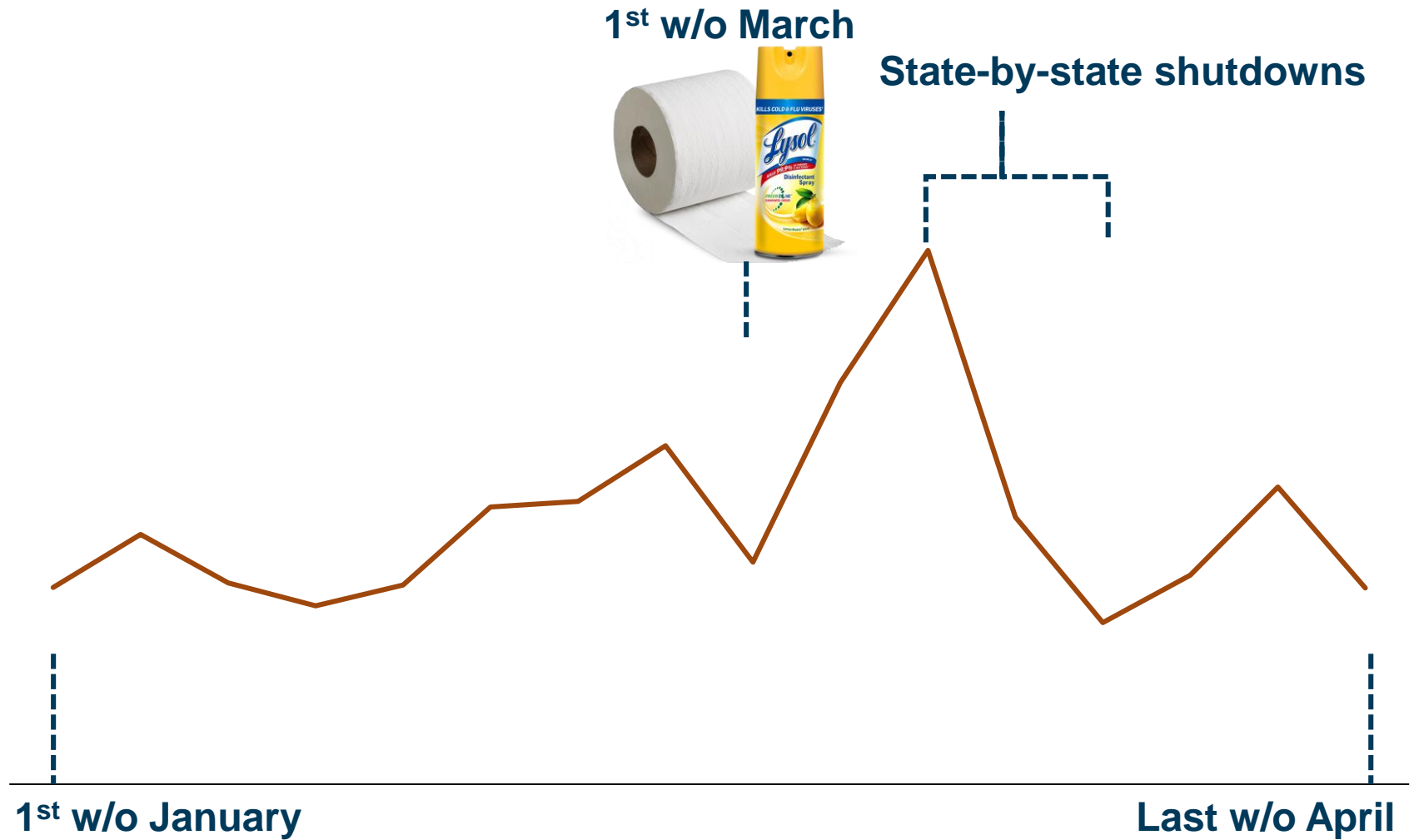
# Petcare



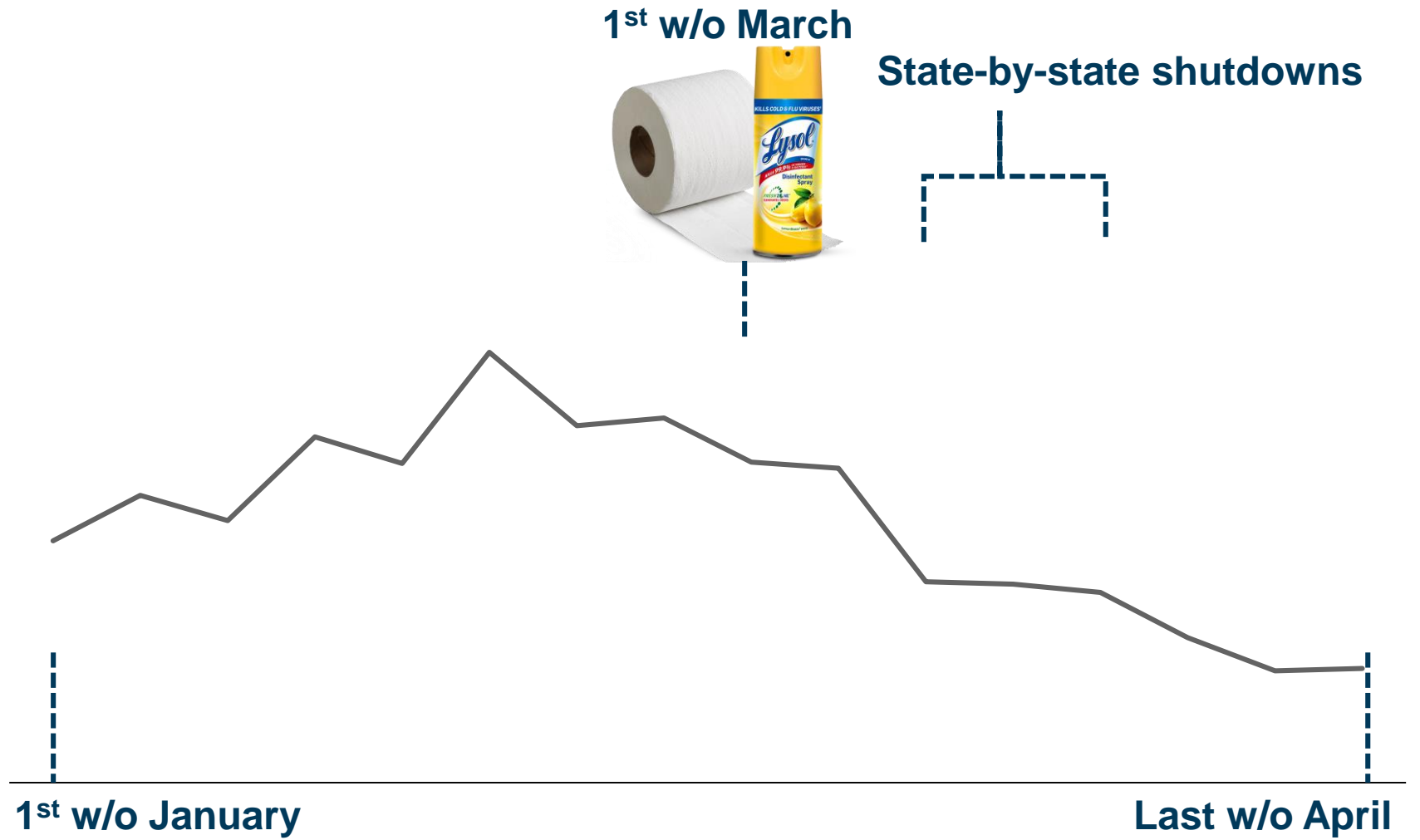
# Apparel



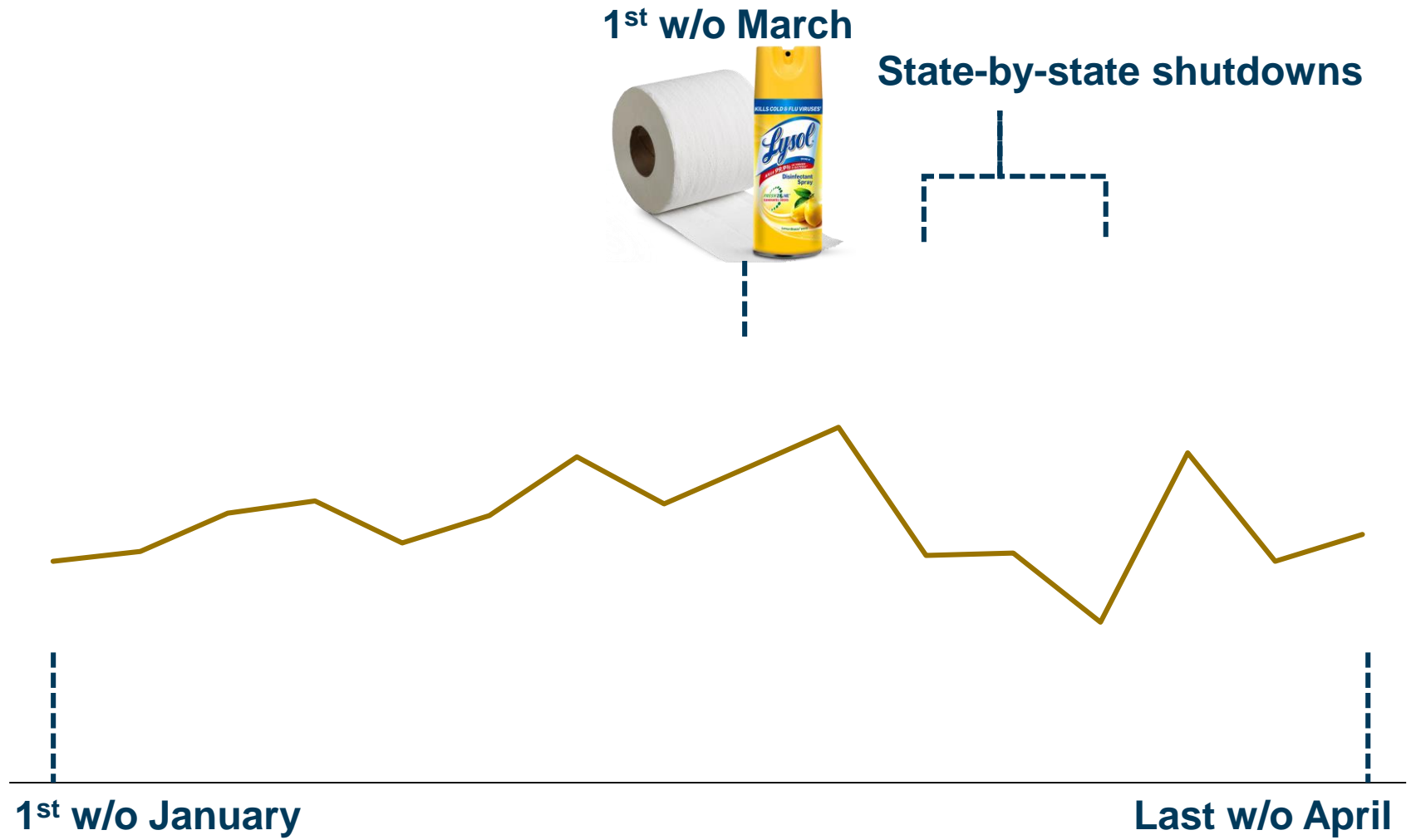
# Coffee Shops



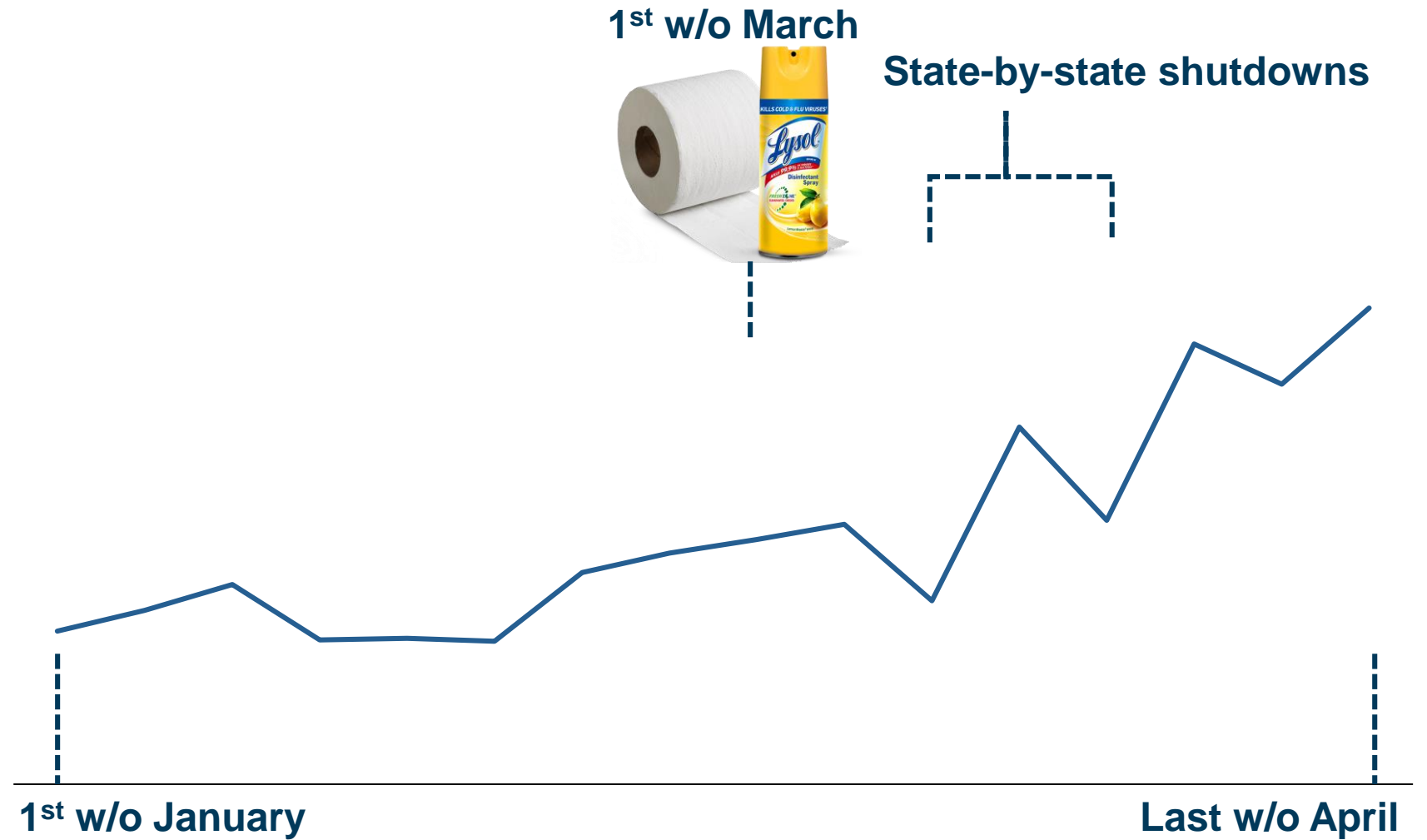
# Fast Food



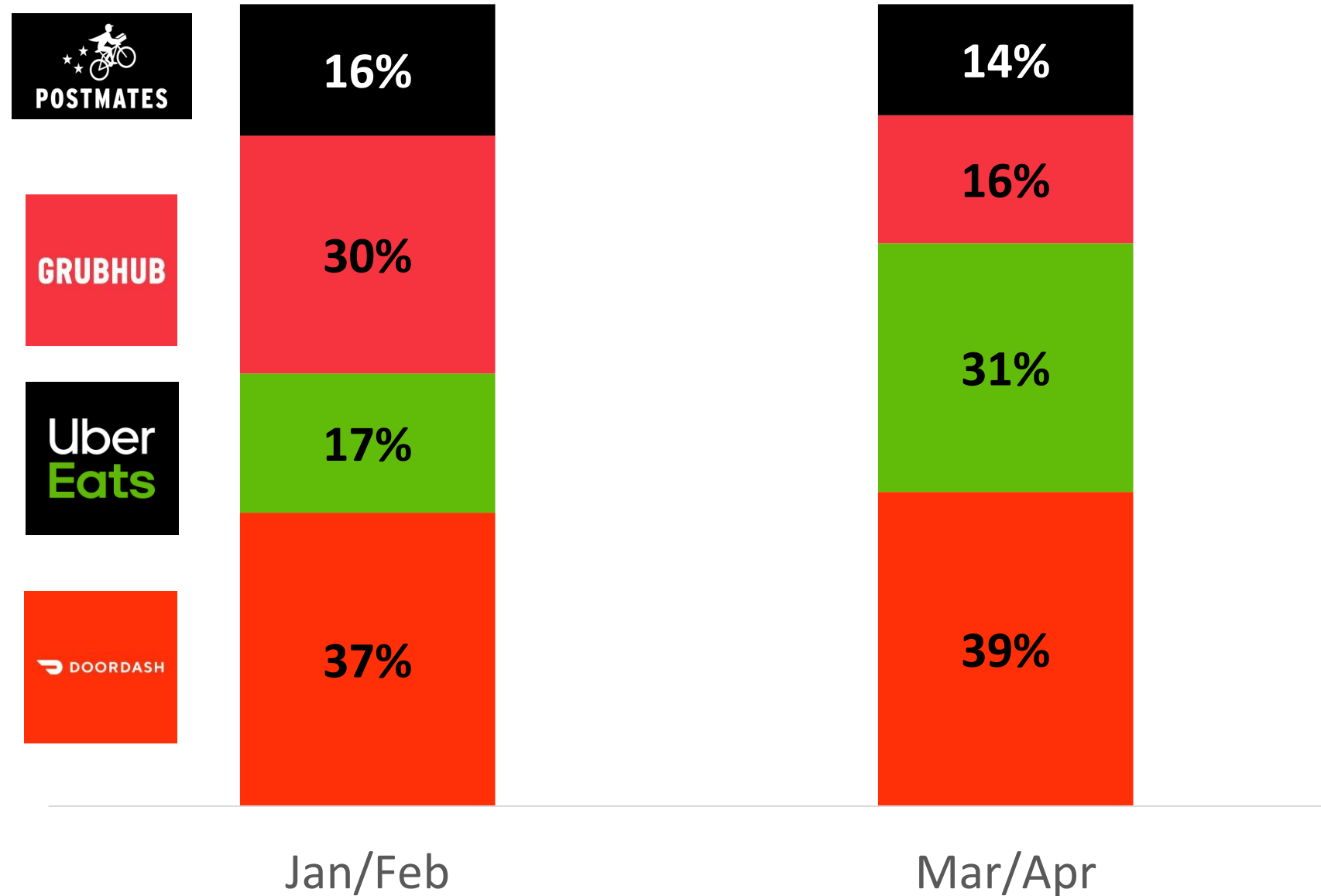
# Restaurants



# Meal Delivery Services



# Meal Delivery Services Share of Wallet





# THE WALL STREET JOURNAL.



## Uber Makes All-Stock Bid For Delivery Rival Grubhub

BY CARA LOMBARDO

Uber Technologies Inc. is seeking to acquire Grubhub Inc. in a deal that would unite two of the biggest players in the cutthroat meal-delivery business when the coronavirus pandemic has sparked a surge in demand for their services.

Uber, which in addition to its flagship ride business operates a big meal-delivery unit known as Uber Eats, approached Grubhub in February with an all-stock takeover offer and the companies have been in talks since then, people familiar with the matter said.

Grubhub recently proposed that Uber pay 2.15 of its shares for each Grubhub share, which Uber rebuffed as too high, and now



Uber, which already operates Uber Eats, wants to acquire Grubhub. An Uber Eats deliverer in Krakow, Poland. MICHAL FLUDRA/NURPHOTO/ZUMA PRESS

its revenue and profit forecasts amid slowing customer growth, sending the shares down 43% the following day and helping prompt the review of strategic alternatives



# Implications: Learning Objectives Crossroads



MRX

CX

UX

INNOVATION

# Segmentation Overview



Summarization  
& Reduction



Clustering

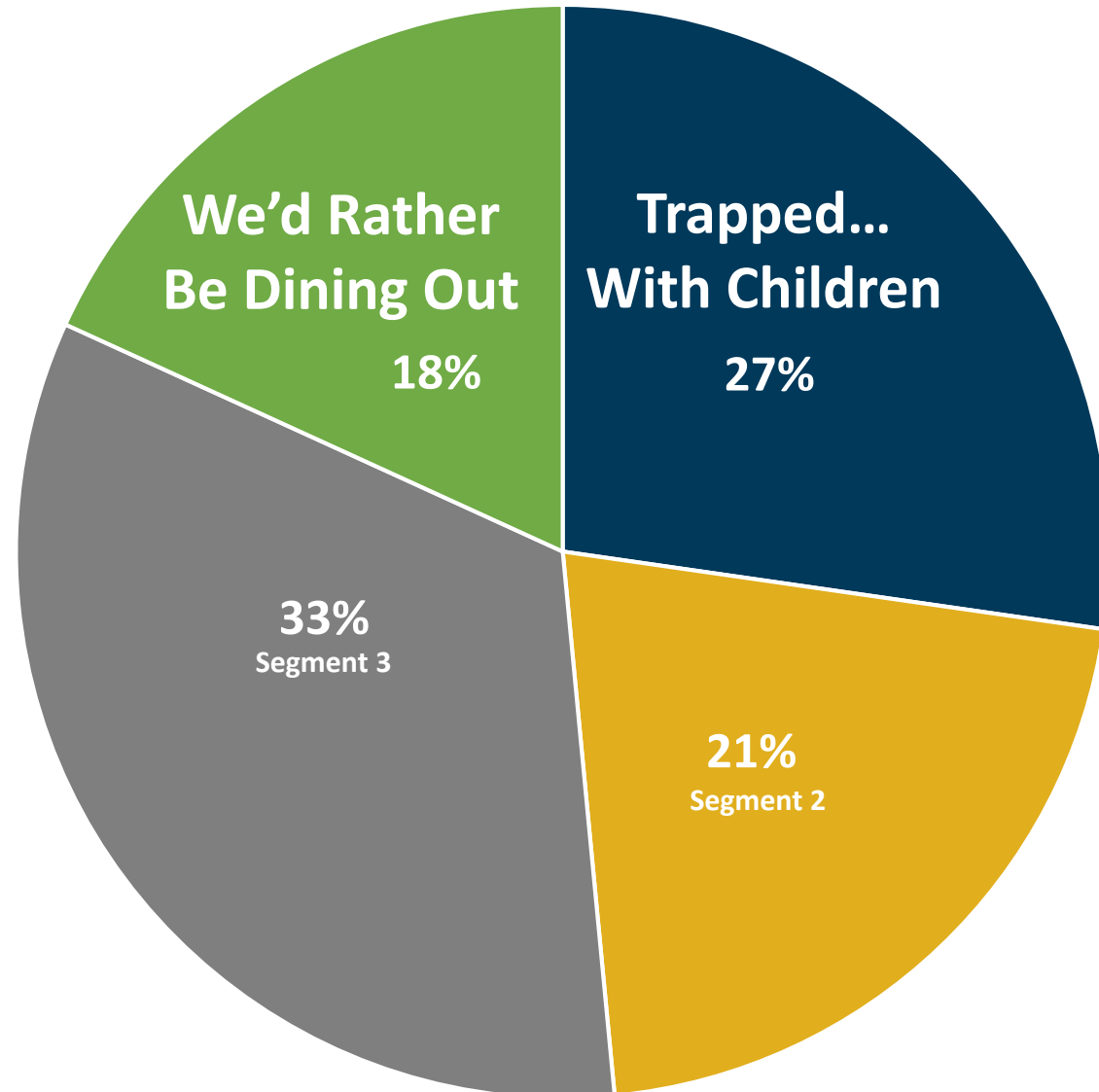


Goodness of  
Fit



Profiling

# Four Distinct Segments Emerge



# Segment 1 TRAPPED... WITH CHILDREN



## 27% Trapped... With Children

of clustered users

- Skews male with a more even split between suburban and urban residences, significantly more Millennial members than other segments
- More likely to be married (50%) and two-thirds have children living at home
- Less definitive favorite for meal delivery service, with 34% reporting DoorDash and about one quarter reporting GrubHub (27%) and UberEats (26%) as preferred
- Must-haves in their meal delivery services include deliveries from their favorite restaurants (18%) and a wide variety of restaurant options (18%)

### Mindsets:

- Strongest reported attitudes toward meal delivery services prioritize convenience and safety:
  - 66% of those Trapped... With Children preferred using meal delivery services over picking up take-out (top 2-box)
  - 51% preferred meal delivery services over dining out at a restaurant (top 2-box)
- Motivators for using meal delivery services during the pandemic include:
  - Supporting local restaurants (83% agree, top 2-box)
  - Supporting social distancing guidelines (81% agree, top 2-box)



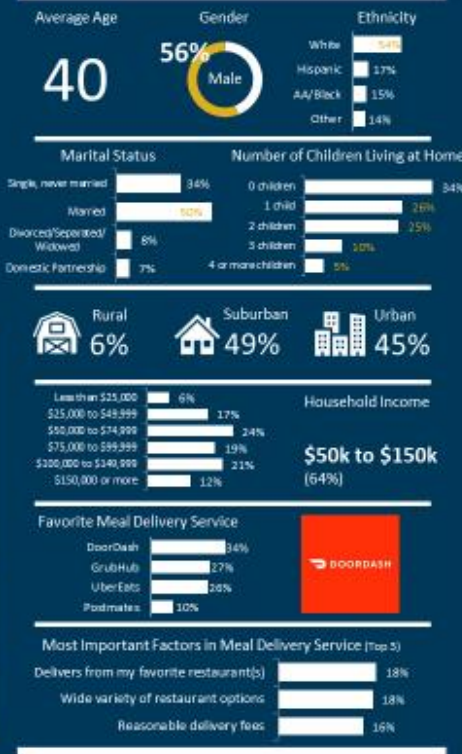
### Attitudes Toward Meal Delivery Services

- I preferred to use meal delivery services over picking up take-out
- I preferred to use meal delivery services over dining out at a restaurant
- I preferred to use meal delivery services over cooking
- Food delivery services are a necessary part of my life during the COVID-19 outbreak
- I only used food delivery services because I was fed up with cooking

### Attitudes Toward Meal Delivery Services During COVID-19 (Top 2-Box)



### DEMOGRAPHICS



COVID-19 outbreak.

80%

Top 2-Box likelihood to use DoorDash (top-rated meal delivery service) once the COVID-19 outbreak is resolved.

5.0

Average number of times DoorDash has been used in the past 30 days.





# Segment 4 WE'D RATHER BE DINING OUT

## 18% We'd Rather Be Dining Out

of clustered renovators

- Smallest segment; skews female and suburban, skews somewhat older with a higher representation of other races, including Asian or Pacific Islander
- More likely to be separated, divorced, or widowed than those in the Trapped...With Kids segment and significantly more likely to not have children living in the house
- 40% prefer DoorDash as their meal delivery service, with UberEats and GrubHub trailing behind at 22% and 20%
- Must-haves in their meal delivery services include reasonable delivery fees (27%) and deliveries from their favorite restaurants (26%)

### Mindsets:

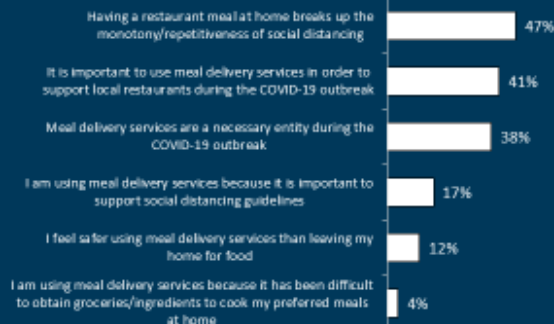
- Strongest reported attitudes toward meal delivery services revolve around the restaurant experience:
  - 2% of this segment report "meal delivery services were an integral part of my everyday diet" pre-outbreak, with 83% disagreeing with the statement (bottom 3-box)
  - 3% of Rather Be Dining Out members "preferred meal delivery services over dining out" before the COVID-19 outbreak, with 74% disagreeing with the statement (bottom 3-box)
- Motivators for using meal delivery services during the pandemic include:
  - Breaking up monotony/repetitiveness of social distancing (47% agree, top 2-box)
  - Supporting local restaurants (41% agree, top 2-box)



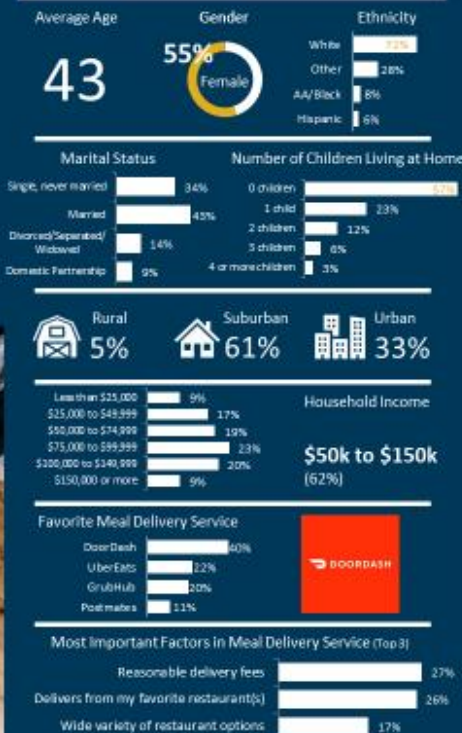
### Attitudes Toward Meal Delivery Services

- I preferred to use meal delivery services over picking up food
- I preferred to use meal delivery services over cooking
- I only used food delivery services because I was fed up with dining out
- I preferred to use meal delivery services over dining out
- Food delivery services are a necessary part of my life

### Attitudes Toward Meal Delivery Services During COVID-19 (Top 2-Box)



### DEMOGRAPHICS



### COVID-19 outbreak.

36%

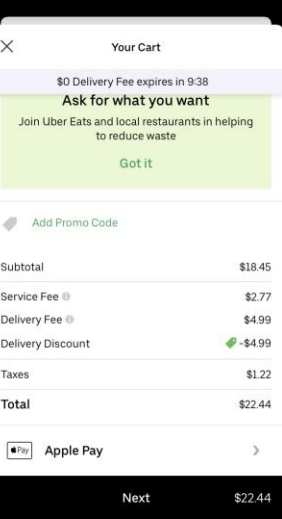
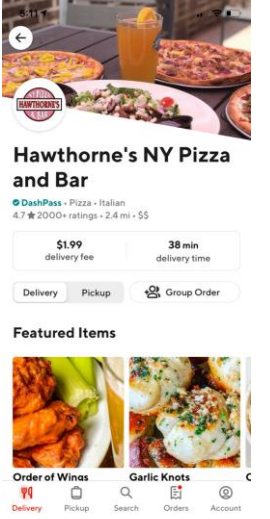
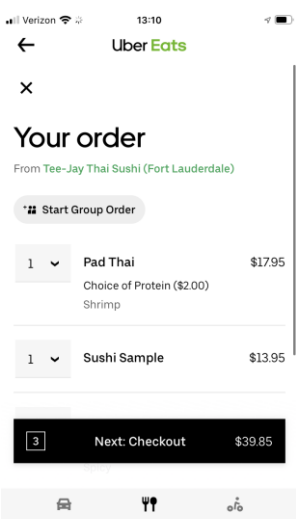
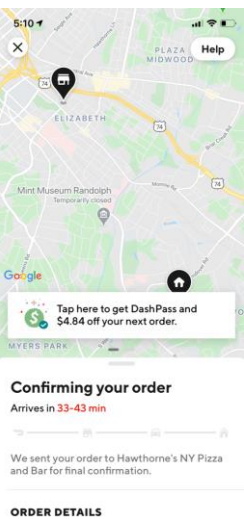
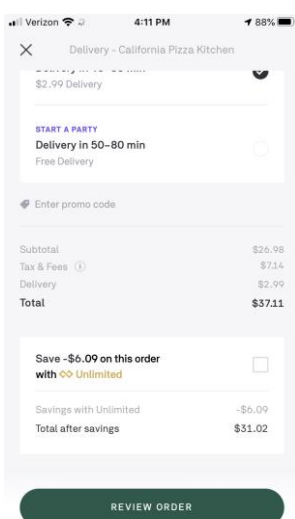
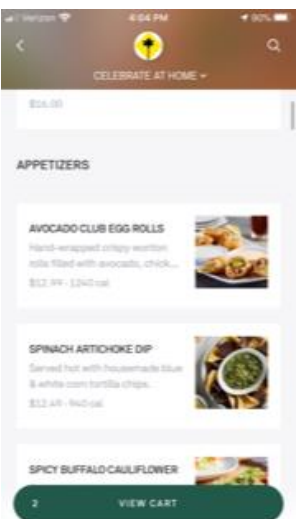
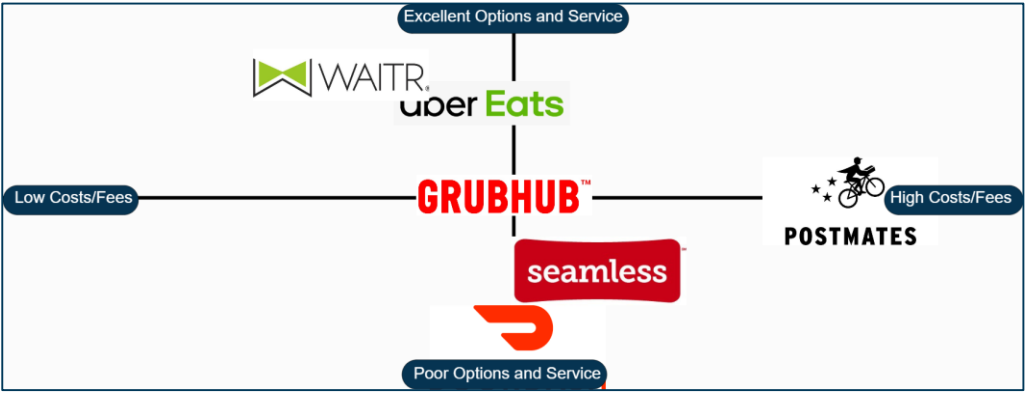
Top 2-Box likelihood to use DoorDash (top-rated meal delivery service) once the COVID-19 outbreak is resolved.

3.2

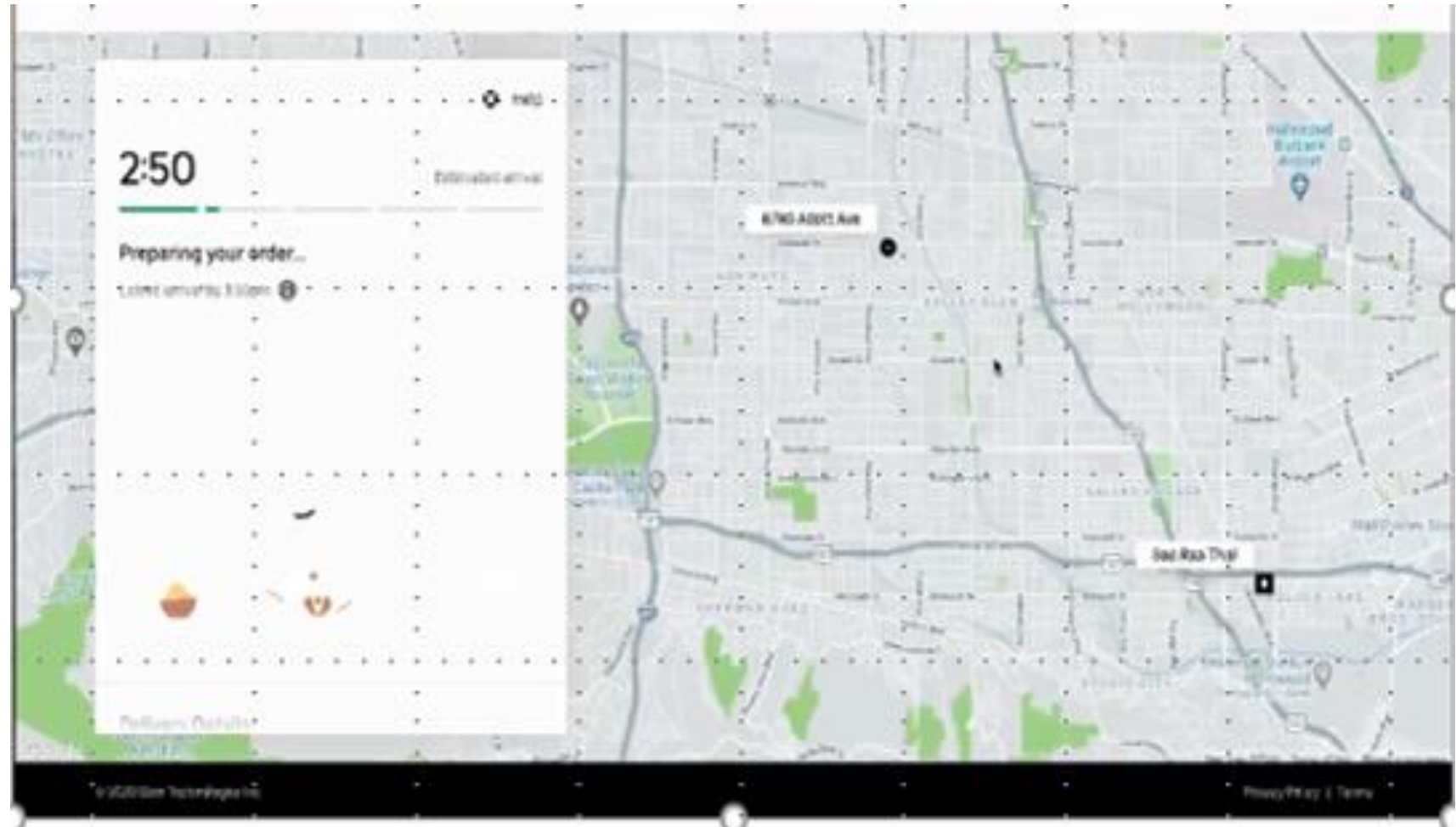
Average number of times DoorDash has been used in the past 30 days.



# Show-and-Tell Ethnographies



# More about GrubHub





# Receiving Deliveries: Modified Behavior



Now More  
than Ever....

In these  
Uncertain  
Times....



# Implications: Learning Objectives Crossroads

MRX

CX

UX

INNOVATION

# Questions



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