2020 DELIVERY UNLOCKED

A SYNDICATED STUDY FOCUSED ON UNDERSTANDING THE LANDSCAPE OF FOOD DELIVERY EXPERIENCES IN CANADA TODAY, HIGHLIGHTING DIGITAL EXPERIENCE GAPS, AND COMPARING ACROSS BRANDS

With an increased reliance on online food ordering and delivery, providing an optimized **customer experience** is now more important than ever. New players are emerging in the marketplace, and customers are increasingly gravitating towards services that can make their lives easier. In other words, there is a lot of opportunity to win new business if companies can deliver on expectations.

Brands wanting to succeed in this climate need to adopt Digital-Centric CX strategies right now.

The COVID-19 outbreak has transformed the delivery industry into a necessity for many. Increased demand has already opened the door for new entrants, jumping to get a share of the market...however the established brands remain the most popular options, with customers flooding their online platforms daily.

As COVID-19 unfolds, and as stores and restaurants close/shift to other channels, people are growing increasingly anxious about leaving their homes, and more interested in using delivery services. . .

For grocery stores...
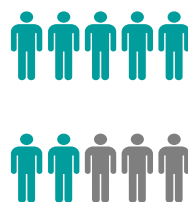
70%

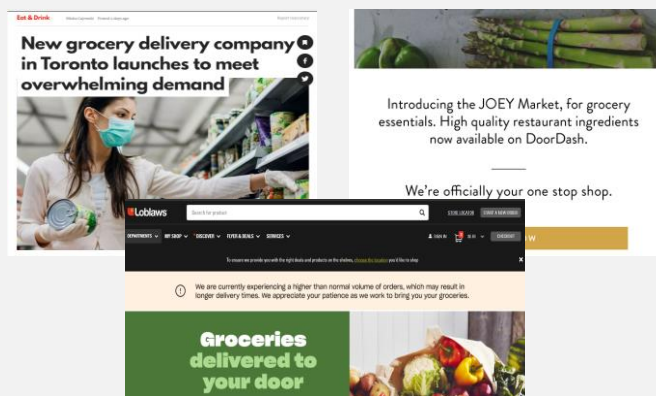Of Canadians are concerned about potential health risks while visiting a grocery store.

Source: Ipsos Food Service Monitor Syndication 2020

For third party online delivery platforms...

18%

Growth in traffic over the 12 months to February 2020

Source: Dalhousie University study across Canadian Mar 2020

New grocery delivery company in Toronto launches to meet overwhelming demand

Introducing the JOEY Market, for grocery essentials. High quality restaurant ingredients now available on DoorDash.

We're officially your one stop shop.

Groceries delivered to your door

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Unlocking the delivery experience in Canada

We will measure and understand the experiences customers are having across this expanding channel. Our multi-method approach brings you an understanding of the **delivery landscape** from our Ipsos Food Service Monitor, combined with **customer experience analysis** by using our CX/UX measures, along with Digital Mystery Shopping to understand the granular detail of **what is happening along the user experience and on the front lines**.

OVERALL OBJECTIVES & BENEFITS

Measuring customer expectations & attitudes when it comes to delivery and ordering, as well as behavioral changes in light of COVID19.

Examining top used brands/apps for food delivery to better understand the landscape. Ranking brands on key CX/UX KPIs.

Understanding strengths and weaknesses of the digital delivery and ordering experience. Comparing and contrasting across brands.

Comparing the actual user experience with the ideal one that clients are expecting, through task oriented data collection.

Providing detailed recommendations on how to improve the overall delivery experience for each brand.

PROGRAM COMPONENTS

Understanding the Landscape
To set the tone for the delivery landscape, we will use the Ipsos Foodservice Monitor (FSM) study to provide context on how the delivery channel is defined. We will bring information such as size and growth of online versus offline orders, importance of third party aggregators relative to restaurant operators, growth of delivery vs takeout, top restaurant brands, menu items, average cheque paid in each channel etc.

Measuring The Customer Experience
An online survey of 1,000 Canadians to understand overall customer needs, expectations, as well as the behavior of recent users of digital delivery services. Capturing the digital experiences, measuring key customer/user experience metrics, and comparing across select delivery brands, as well as customer demographics. Examining behavioral changes, and brand impacts emerging from COVID-19.
Respondents must have used a digital delivery platform in the past 3 months. We will capture first time users during COVID-19 and regular online delivery customers. Each customer can answer for up to 2 delivery brands that they use. Quotas based on usage, will be put in place to control for sample per brand.

Assessing The Real Process
Digital Mystery Shop of 125 delivery transactions to assess and map the user experience of specific digital delivery brands:
- Exploring design, accessibility, and ease of use
- Identifying detailed platform pros and cons
- Comparing across assessed brand
- Capturing the actual physical delivery process, adherence to special requests, and how the product is delivered
- Assessment of both mobile apps and websites for each brand as available, delivery/pickup, and new & previous users

Reporting & Analysis
- Categorizing brands based on a variety of KPIs such as user-experience, likelihood to recommend service, and ease of use
- Journey mapping & gap analysis of users experience for the different brands
- Uncover insights and suggestions that will carry brands forward

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The program's scope will focus on understanding the experiences of restaurant delivery/3rd party aggregators and/or grocery delivery such as those listed below:

GROCERY DELIVERY

amazonfresh

Walmart Grocery · To Go

COSTCO WHOLESALE

express

voilà

3rd PARTY AGGREGATORS

Uber Eats

DOORDASH

GRUBHUB

foodora

SKIP THE DISHES

RESTAURANT DELIVERY

BURGER KING

McDonald's

Starbucks

Wendy's

KFC

Tim Hortons

TIMELINE

A 4 week time frame will be required from setup to final report delivery

We understand that you might want to see results sooner, thus we will provide a top line report in week 3 highlighting key findings, prior to sharing the full report.

PROGRAM COST

2020 Delivery Unlocked, including all components:

- Understanding the Landscape – Ipsos FSM Data

- Measuring the Customer Experience – n1,000 Online Interviews with recent delivery users

- Assessing the process – n125 Digital Mystery Shops for 1 category (Grocery or Restaurant delivery)

- Reporting & Analysis

Total cost is $29,000* CAD, exclusive of applicable taxes.

EARLY BIRD OFFER:

Add up to 3 custom proprietary questions on the online survey for free if you sign up before April 30, 2020.

*Access to Ipsos FSM Data - For organizations who do not currently subscribe to the FSM syndicated work, a brief add-on of this data providing information on the wider Food Service context in Canada is available. The cost to add on this report is $7,500 CAD exclusive of applicable taxes.

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BE SURE. GO FURTHER.

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