



# What is DoorDash?

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DoorDash is a technology platform that connects people with the restaurants and stores in their neighborhoods.

Consumers place orders on the DoorDash app or website, and we help restaurants and stores facilitate on-demand delivery, online ordering, pickup, and more.

The global online food delivery industry generated over \$136 billion in revenue in 2020, and is projected to reach more than \$182 billion by 2024.





# DoorDash is a technology company building last-mile logistics solutions for merchants

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Over  
**1M+**  
Dashers

Independent contractors  
who complete deliveries for  
merchants



Over  
**400K+**  
Merchants

Businesses who trust  
DoorDash to serve their  
customers & communities



Over  
**4K+**  
Employees

Individuals creating  
solutions for Merchants,  
Dashers & Customers



Over  
**1B+**  
Deliveries

Opportunities to serve  
customers and learn how to  
make our platform stronger



# With DoorDash you can...

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**Reach new customers:** Reach thousands of consumers already using delivery platforms. DoorDash reaches 85% of the U.S. population, 80% of the Australian population, 75% of the Canadian population, and is continuing to grow worldwide.



**Grow off-premise sales:** Receive incremental orders to boost revenue. In fact, 65% of restaurants say they were able to increase their profits during COVID-19 because of DoorDash.<sup>1</sup>



**Increase brand awareness:** Use our game-changing marketing tools to boost your online presence, so your offerings reach more customers.



**Get a powerful logistics platform.** We provide built-in ordering and payments technology, a seamless online ordering experience, and connect you with Dashers to deliver orders.



# What separates DoorDash **from the rest?**



**We are true  
business partners**

Our merchant-first focus and dedicated operations team helps grow your sales, improve operations, handle support issues, and engage in co-marketing



**We are committed  
to quality**

The buck doesn't stop when you begin working with DoorDash. We are committed to delivering the right thing, on time, every single time




**We use data to  
drive improvements**


Our local Data Analytics team is able to provide data that can help you decide everything from where your customers are coming from to where should open your next location





# A premium offering through Caviar



**Bola De Momofuku**  
**PLANTA**  
**Joe's Stone Crab**  
**Makoto**  
**Carbone**  
**Osteria Morini**  
*Rich Table*




**ZAGAT**  
  
MICHELIN  


*"Caviar is an invaluable asset to any restaurant operation. The Altamarea Group restaurants run the scoop from pizzeria to MICHELIN Star dining. Efficiency is more important than ever."*  
— Rebecca Levine, Director of Client Relations & Off-Premise of The Altamarea Group


**The delivery app for food people.**

Hi, we're Caviar. We're all about connecting diners to the (actual) best restaurants in their area. Restaurants like yours.



**Reach high-value customers**

Our customers love food, and it shows in their ordering habits. We have a national average ticket size of \$49 per order.











**Keep good company**

We're MICHELIN's official delivery partner—and we team up with Zagat and the Infatuation, too—to bring high quality food collections to our diners.



**Test out new dishes**

Have a limited-run dish or a new special you want to try out? Use our item-limit features to create excitement and sell small-batch.

**caviar**

# Competitive Analysis- Nationally



DoorDash is the #1 3rd Party Delivery Service

12-month change\*\*

Fastest growing player over the past 12 months with 6x the growth of closet alternative

DOORDASH

9.7

Uber Eats

1.7

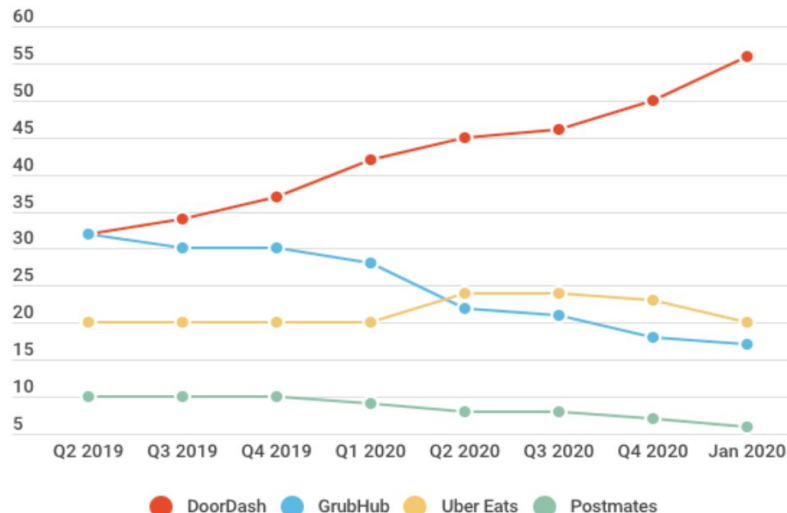
-5.1

GRUBHUB

-4.3

Postmates

## 3rd Party Market Share: Nationwide



- DoorDash's nationwide is up from 32% to 56% over the last 2 years.
- GrubHub's market share is down from 32% to 17%.
- Uber Eats has remained between 20% and 25%.

\*\*May 2021 vs. May 2020 market share absolute delta.



# Florida: Growth and Quality Gains

DoorDash has come a long way since you started working with us - we've invested in growing our user base & optimizing our delivery quality to become the premier delivery partner in Florida.



## Marketplace Growth

Key Growth Metrics	ytd/y
Weekly New Consumers	12%
Weekly Order Growth	87%
DashPass Users	46%
Dasher Fleet Size	36%



# Florida/Puerto Rico: Upcoming Strategic Investments

Our leadership has big plans for Florida in the next 3 months - doubling down on merchandising in app for new selection wins and integrating Spanish language into customer/merchant/Dasher communications

## Merchandising

**Maria Torres** joined the S&O team in July to help streamline Florida/PR specific merchandising in the app. She is working closely with the OAM team to deploy their MAC budget.,

## Where Diverse Meets Delicious

The Incredible Tastes of India



**Famous Kabab**

\$\$ • Indian, Pakistani, Ban...  
3.8 ★ 186 ratings



**Kwalty Fusion (Tampa)**

\$\$ • Indian, Pickup, Takeout  
4.2 ★ 166 ratings

38 min  
Free delivery

38 min  
Free delivery

## Spanish Language Integration

North Star: by the end of **Q4 2022, ALL merchandising platform content distributed in Florida will be fully bilingual in English-Spanish.**






This is important because::

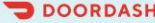
- It allows us to grow and empower ALL local economies
- Lives up to reflecting the communities we serves
- Will help develop collaboration, processes, and uncover needs the organization as we scale globally













# DashPass


DashPass is our subscription program that gives customers \$0 delivery and lower service fees on select DashPass restaurants



Thousands of restaurants nationwide



No delivery fees on orders over \$12



Easily cancel anytime

## Early success & customer adoption

DashPass customers are more loyal than ever—they order more frequently and spend more money.

### 40%

uplift in customer retention rate

### 37%

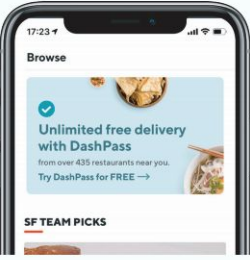
increase in customer order frequency

### 5%

increase in average ticket size

### \$4-5


in savings per order



Browse

Unlimited free delivery with DashPass  
from over 435 restaurants near you.  
Try DashPass for FREE →

SF TEAM PICKS



## Rapid volume growth

DashPass is currently 30% of DoorDash volume and is expected to hit 40% of total volume by 2021.

30%  
2020

→

40%  
2021

Visit [doordash.com/dashpass](https://doordash.com/dashpass) for more details

Top of App

Placement of DashPass Restaurants

2X

Order frequency from DashPass members than our normal customer

5%

Higher ticket sizes from DashPass members

\$4-5

Average Customer Savings per DashPass Order

9

# POS Integrations

Enable a seamless merchant experience through our integrated offerings.

**What is a POS Integration:** We inject the customer's order directly into their Point-of-Sale system, removing the manual order entry step. We are able to do this by having a back-end integration that allows for systematic menu and order flow by store.

## What are the benefits?

- **Orders** are entered into POS system automatically, removes need for a tablet
- **Accounting** & reporting is auto-consolidated real time into POS system
- **Restaurant operations** and DoorDash orders are treated the same
- **No special training**, as POS workflow remains the same



## How merchants get onboarded to POS:

Refer to our [POS Activations Wiki](#) for full details

## What are my integration options?



### Middleware / Aggregators

Checkmate, Olo,  
Deliverect



### POS System [ **Most Preferred** ]

Toast, Square, Clover,  
Revel, Aloha/NCR



### Restaurant Partners POS

Chipotle, McDonalds

Our Partner Integrations team is aiming to directly integrate with the top 10 local POS Systems by 2021 exit. In the meantime, merchants can integrate through an aggregator or sign up on tablet until their POS system is offered.

For more information on who we integrate with, refer to the [POS Integrations Matrix](#)

# Alcohol

Grow order values and volume with alcohol

## WHY ADD ALCOHOL?

1. Increase profit margin. [Scaffidi Restaurant Group](#) saw a **10-12% increase in profit margin** on orders with alcohol
2. **56% of customers surveyed over the age of 21** say they would be likely to order alcoholic beverages if offered as part of a food delivery order
3. **Increased customer exposure.** Secure a spot on DoorDash's dedicated alcohol landing page
4. **Compliance on DoorDash**
  - a. Dashers verify legal age of customer upon delivery
  - b. Alcohol deliveries are only assigned to Dashers who are 21+ years old

## HOW TO ADD ALCOHOL

1. If you have <10 store locations on DoorDash
  - a. Add now via the **Merchant Portal**! You can follow this [step by step guide](#) or watch this quick [video](#) for instructions
2. If you have 10+ store locations on DoorDash
  - a. Let your DoorDash rep know you are interested and ask them to send over an alcohol addendum

## Unlocked States / Provinces\*



- United States: California, Connecticut, District of Columbia, Florida, Idaho, Illinois, Iowa, Kentucky, Michigan, Missouri, Nebraska, New York, Ohio, Oregon, Texas, Virginia, Washington
- Canada: Alberta, British Columbia, Manitoba, New Brunswick, Ontario, Quebec

## Best-In-Class Compliance

### Merchant

*Frictionless way to add alcohol compliantly to menus*

Modal / Desktop - With Close

✕

**Does this item contain alcohol?**

Merchants are legally required to identify alcohol items on their menu. Failure to tag alcohol items could result in a loss of your liquor license.

☒ This is a non-alcoholic item

☐ This item contains alcohol

Continue

### Dasher

*Dashers prompted to check recipient's ID at delivery*

Scan customer's ID before handing over any items

1. Check if customer is intoxicated.
2. Ask 'Are you 21 years old or older'.
3. Check if customer matches the ID.
4. Check for any ID tampering.

Got it

I need help

### Customer

*Seamless customer experience with alcohol agreement at checkout*

**Alcohol Agreement**

You are purchasing alcohol with this order. By continuing, you have agreed to the following:

1. **Must be picked up by someone 21+**  
A valid, non-expired government ID must also be presented to pick up the order.
2. **Refund restrictions apply**  
You won't receive any part of the order or a refund if the recipient is underage, intoxicated or unavailable.

See DoorDash's [Terms and Conditions](#).

*\* Every state's law is different with respect to what types and quantities of alcohol may be sold and delivered via third party platforms, and many states restrict delivery to certain locations and times. Please consult your retail alcohol permit and local laws to confirm that you are allowed to include alcohol.*



# Merchant Portal

*Manage and grow your business with detailed analytics on menu performance, ratings, operations, and customer experience*

## Get insights you need to grow your business:

- Track your sales
- Enhance your menu
- Access key metrics and data



### Get a dashboard view

View key data points like net sales, average order size, unique customers, and most popular items.



### Act on customer feedback

View customer ratings and reviews and quickly respond to encourage loyalty.



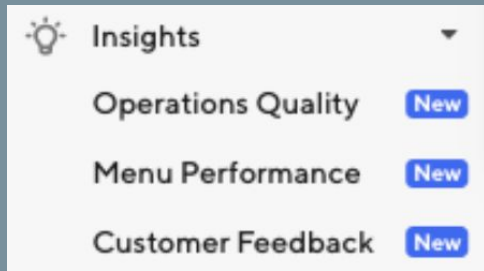
### Grow your sales

Launch marketing campaigns to boost your sales and increase in-app visibility with new and existing customers.



# Insights Hub

Helps you find opportunities to grow your sales, better understand your business, and meet customer needs



## Menu Performance

Optimize your menu by reviewing top-performance items by time, date, and location. Get personalized tips to drive conversions and sales.

## Customer Feedback

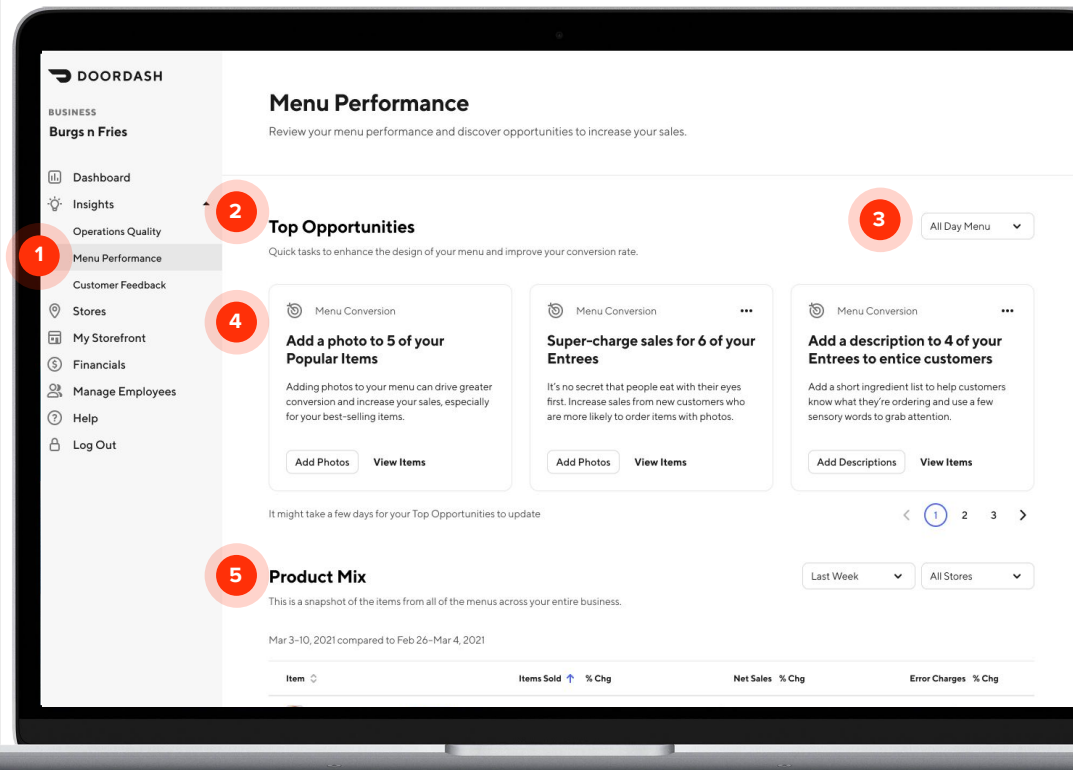
View recent and lifetime ratings and use pre-written templates to report issues. Plus, respond directly to customer feedback.

## Operations Quality

Track operational metrics to ensure you're providing a seamless delivery experience.

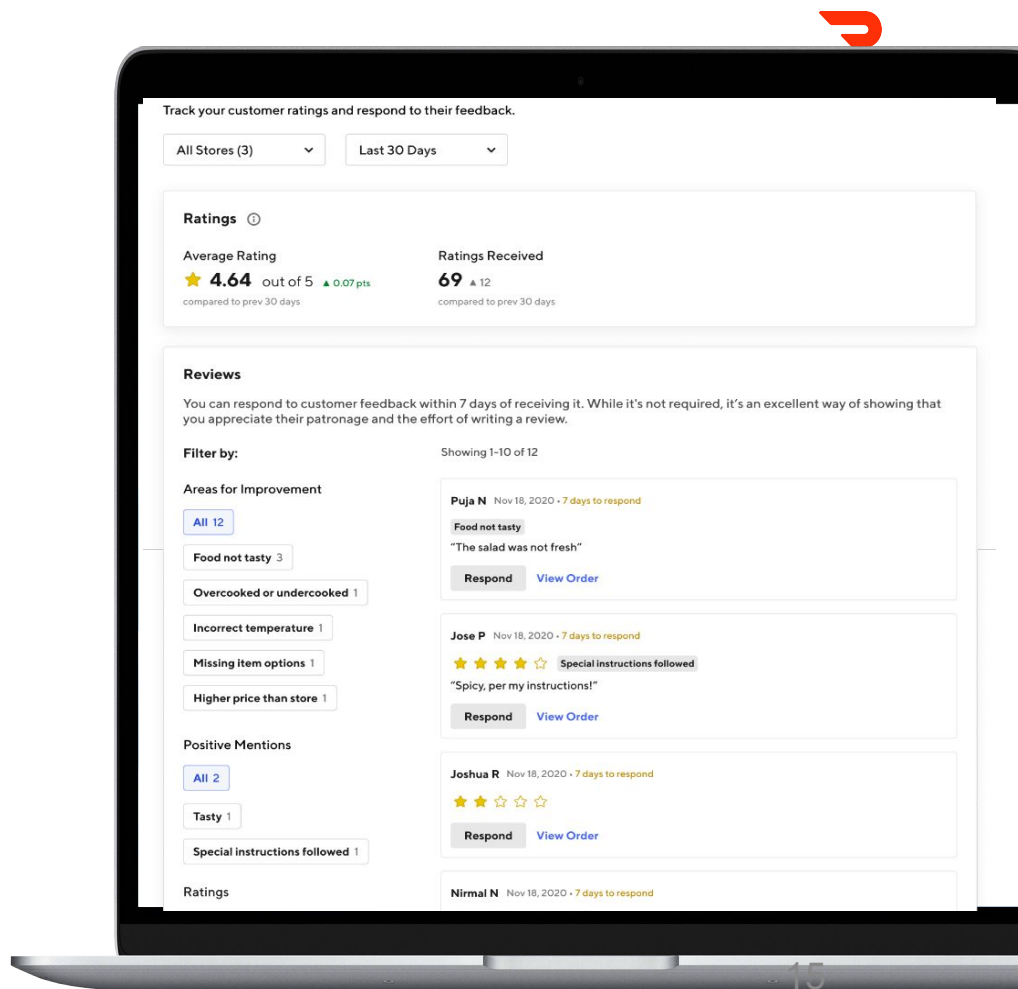
# Menu Performance

1. Click the new **Insights Hub** in the left navigation and then click **Menu Performance**
2. Review your **Top Opportunities** to improve your menu and maximize your opportunity to increase your sales
3. If you have multiple menus, you can choose which menu to view
4. Your **Top Opportunities** are customized for you, based on each menu, and are quick tasks to enhance your menu design.
5. Review your **Product Mix**, a snapshot of item performance. Filter by week/month and across your business or by store(s)



# Customer Feedback

1. Click **Customer Feedback** in the left column navigation
2. Select the time period and the subset of stores for which you'd like to review feedback.
3. Filter reviews by **star ratings and tags** to easily spot areas of excellence or improvement.
4. Click on **View Order** to contextualize the what the customer ordered and if they were any delivery errors such as missing or incorrect items.
5. **Respond** to your customers by personalizing a message and Choose if you'd like to gift the customer a dollar amount off of their next order from your restaurant. Customers who receive a response are 5x more likely to reorder from you!





# Typical Commission Tiers

## Basic

DoorDash at the lowest cost

Let customers order from you on DoorDash and add marketing programs when you need them.

### Your Cost

15%

Delivery Commission

6%

Pickup Commission

Credit card processing included

### Key Benefits

- ✓ Reliable and fast delivery with DoorDash
- ✓ Access to high-value customers with DashPass
- ✓ A bigger delivery area to reach more customers
- ✓ Accept at least 20 orders per month or pay zero commissions\*

## Plus

More sales with DashPass

Increase sales and reach our most loyal and frequent customers with DashPass.

### Your Cost

25%

Delivery Commission

6%

Pickup Commission

Credit card processing included

### Key Benefits

- ✓ Reliable and fast delivery with DoorDash
- ✓ Access to high-value customers with DashPass
- ✓ A bigger delivery area to reach more customers
- ✓ Accept at least 20 orders per month or pay zero commissions\*

## Premier

The most orders and new customers

Maximize sales with the biggest delivery area, DashPass, and more. Backed by our Growth Guarantee.

### Your Cost

30%

Delivery Commission

6%

Pickup Commission

Credit card processing included

### Key Benefits

- ✓ Reliable and fast delivery with DoorDash
- ✓ Access to high-value customers with DashPass
- ✓ A bigger delivery area to reach more customers
- ✓ Accept at least 20 orders per month or pay zero commissions\*

Included with every plan

## Storefront by DoorDash



Let customers order delivery and pickup on your website. Storefront is commission-free and uses your branding and logo.

### Your Cost

No commissions

Pay just 2.9% + 30 cents per order for credit card processing. No commissions, monthly fees or set-up fees.

Have your own delivery team?

## DoorDash Self-Delivery



Use your delivery team to deliver DoorDash orders for your business. You control the delivery experience, set your own delivery area, and choose what fees you'd like customers to pay for delivery.

### Your Cost

15%

Commission for delivery orders

6%

Commission for pickup orders





Perfecting Pizza Since 1987

**FLIPPERS IS PIZZA PERFECTED.**









**FLIPPERS**  
PIZZERIA



**DOORDASH**

**PIZZA. PASSION. PERFECTION.**





THANK YOU