



Uber Eats

UBER EATS: WINNING THE DELIVERY WAR

How to Grow from 23% to 35% Market Share in 18 Months

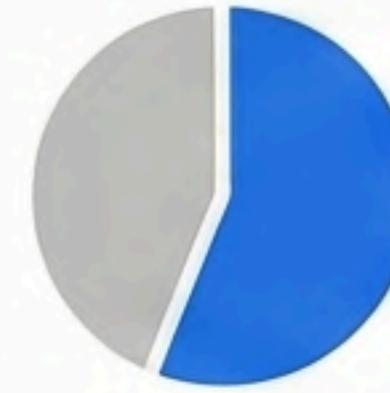
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THE COMPETITIVE GAP

Current State Analysis



DOORDASH (LEADER)



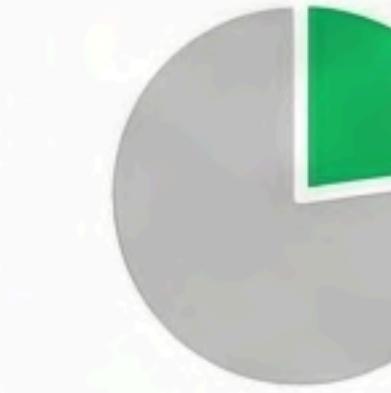
Market Share: 56%



Delivery Speed: 26 minutes



UBER EATS (CHALLENGER)



Market Share: 23%



Delivery Speed: 38 minutes



The Business (Q4 2025):
Revenue: \$4.9B (+30% YoY).
Strong growth, but losing market share war.



THE GAP & ISSUES



Gap: 33 percentage points



Gap: 12 minutes slower



Core Issues:

- Drivers don't trust earnings (tip baiting)
- Delivery is too slow
- Not leveraging Uber's ride ecosystem

KEY METRIC: Q4 2025 Revenue: \$4.9B (+30% YoY)

BREAKTHROUGH IDEA #1: DRIVER FAIRNESS SHIELD

Rebuild driver trust with AI-powered guarantees



THE PROBLEM: (BEFORE)

- ✗ Drivers see “\$15 estimated” → Actually earn \$8
- ✗ Customers remove tips after delivery (tip baiting)
- ⬇ Result: **18% driver churn** per month



THE SOLUTION: (AFTER)

- ✓ Guaranteed Minimum Payout (AI-predicted)
\$ “Earn **AT LEAST \$12**, guaranteed by Uber”
- ✓ Tip Lock After 60 Minutes
🔒 + Mandatory reason for any reduction
- ✓ Customer Trust Score
 - ★ Serial tip-removers get “Estimated” label
 - ✓ Good customers get “Guaranteed” badge
- ✓ Transparent Earnings Receipt
 - ≡ Base + Distance + Tip + Bonus = Total



IMPACT:

- ⬇ ✓ Driver churn: **18%** → **12%** (-33%)
- ⬆ ⏳ +**15%** more working hours per driver
- 💰 +**\$320M** annual revenue

KEY METRIC: **+\$320M** annual revenue

BREAKTHROUGH IDEA #2: PERFECT TIMING ENGINE

Use AI to match drivers and food readiness perfectly



THE PROBLEM: (Current Process)



THE SOLUTION: (New AI Process)



- ✓ **Restaurant Ready Predictor:** AI learns: "Sushi takes 18 min, burger takes 3 min". Only dispatch driver when food is actually ready.
- ✓ **Pre-Positioning Intelligence:** "Orders will spike downtown in 15 min". Guide idle drivers to hot zones early.
- ✓ **Smart Multi-Order Routes:** Show driver 2 route options with time/pay. Let them choose best option.



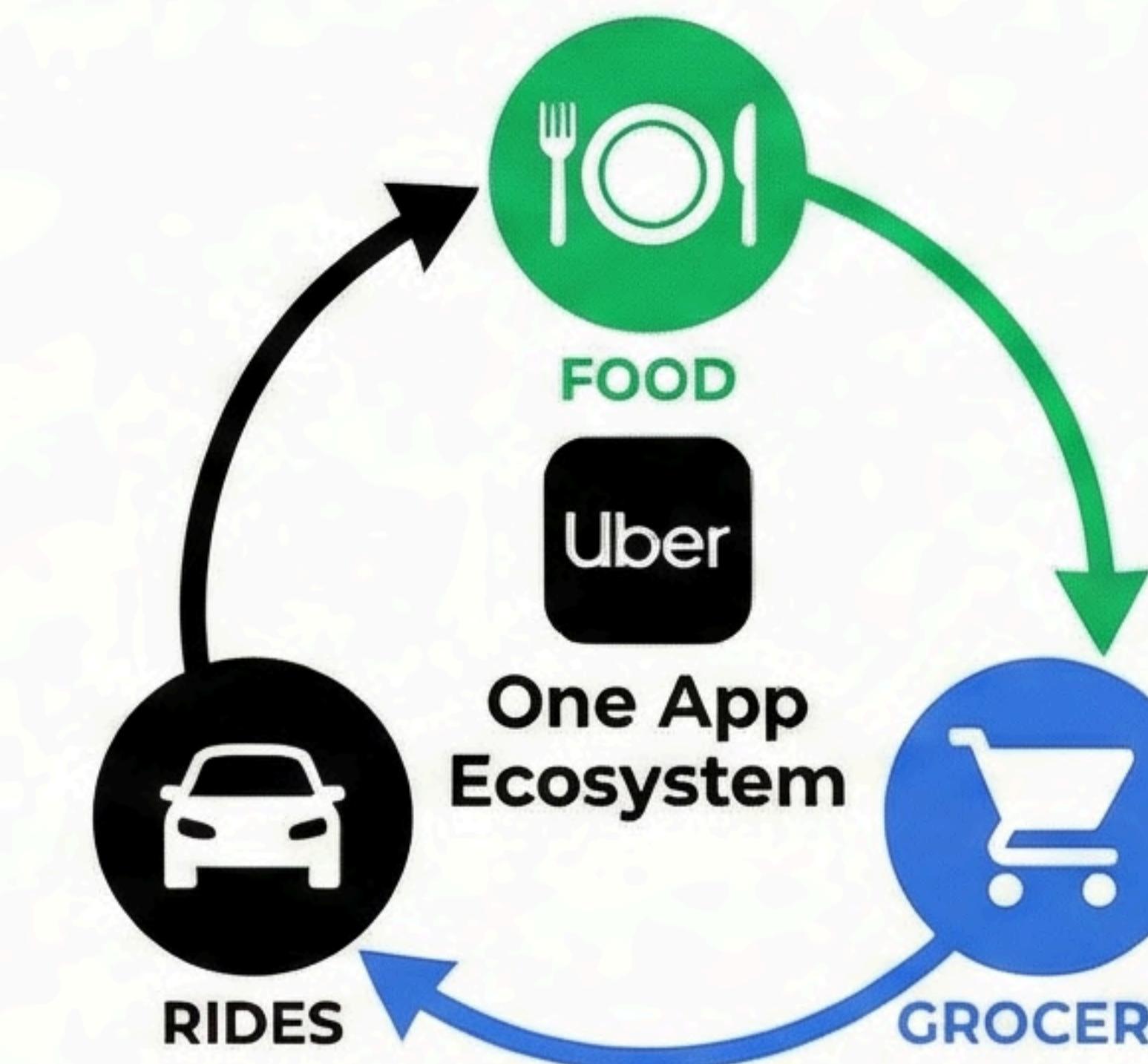
IMPACT:

- Delivery time: 38 min → **30 min** (-21%)
- Match DoorDash speed (26 min)
- **+7% order frequency** per customer
- **+\$3.3B annual revenue**

KEY METRIC: +\$3.3B annual revenue

BREAKTHROUGH IDEA #3: ONE APP FOR EVERYTHING

Leverage Uber's unfair advantage—40M daily rides



THE OPPORTUNITY

Uber ≠ just food delivery

Uber = Rides + Food + Grocery + Everything

THE SOLUTION

🚗 **Ride-to-Dinner Magic:** You finish Uber ride at 6:30 PM → "Order dinner now, delivered by 7:00 PM" → 10% of evening riders = 1.2M daily food orders

🛒 **AI Predictive Shopping:** Thursday coffee order → "You run out of coffee Fridays. Add beans?" → Smart upsells at perfect moment

💎 **Uber One Complete Bundle:** \$19.99/month for unlimited everything. Free delivery: food + grocery + rides discounts. Target: 35M subscribers (vs 20M today)

IMPACT:

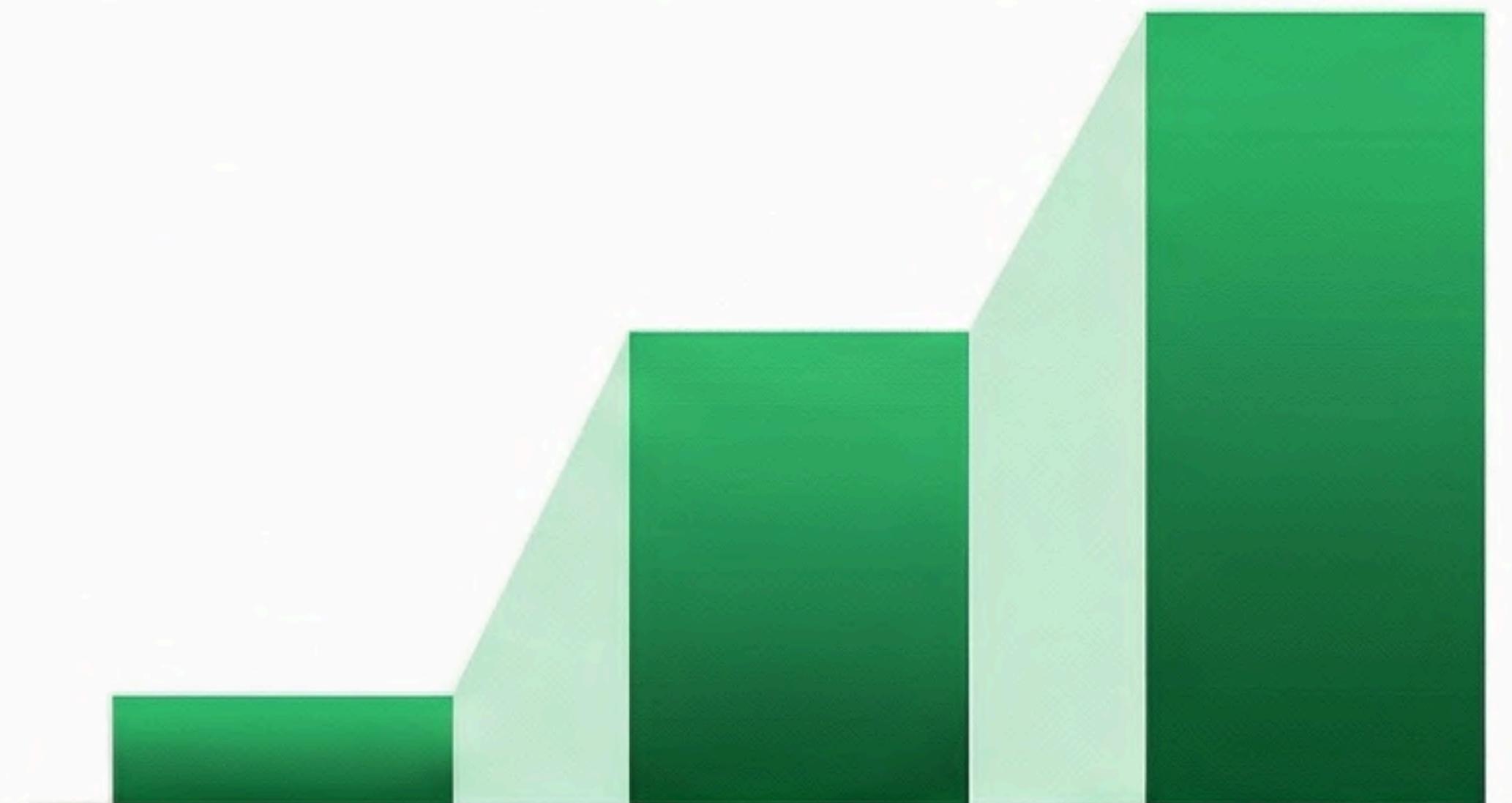
- **↑ +15M new subscribers × \$240/year = \$3.6B**
- **✓ Ride users → Food users conversion**
- **\$ +\$6.45B annual revenue**

KEY METRIC: +\$6.45B annual revenue

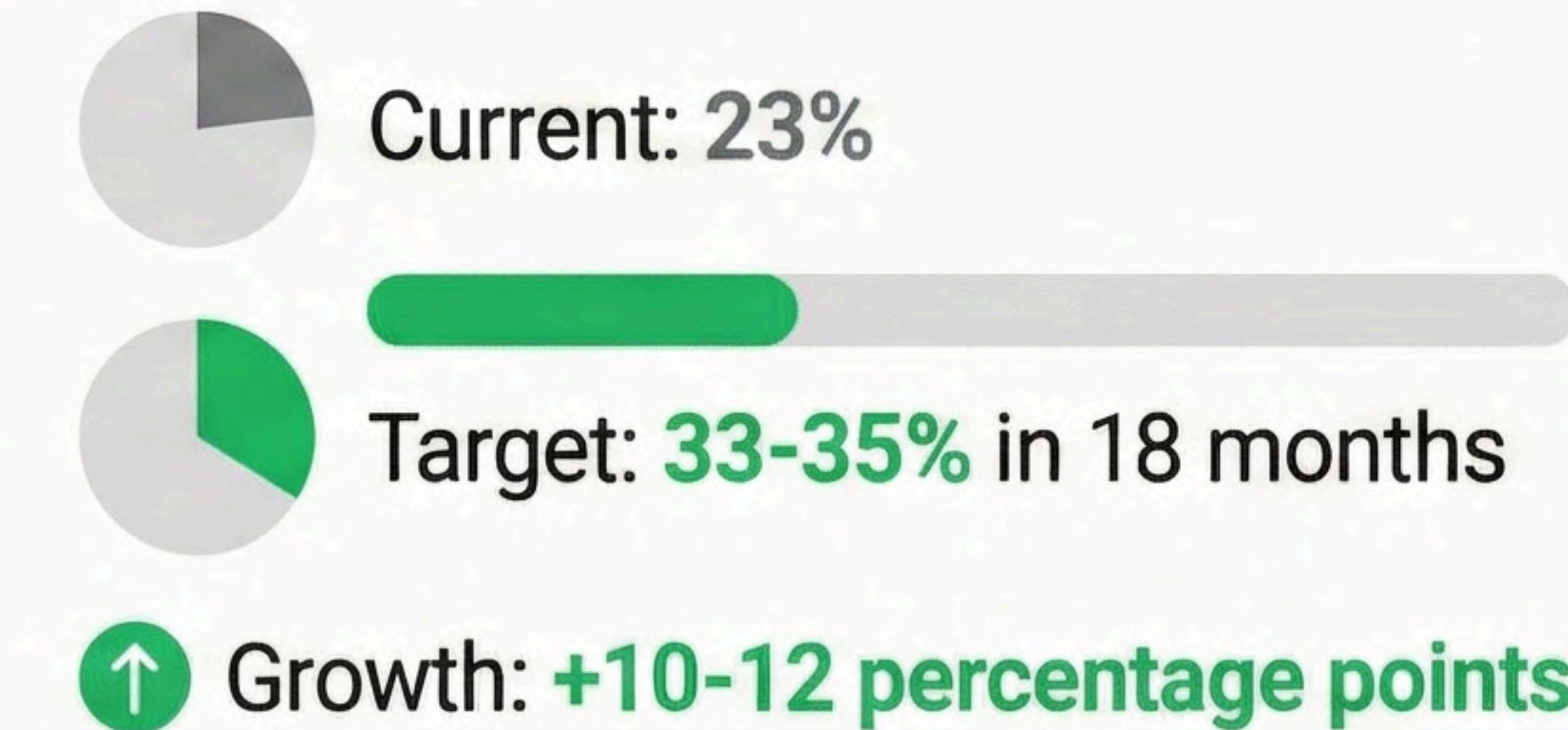
THE TOTAL BUSINESS IMPACT

Revenue growth, market share, and execution timeline

\$ REVENUE IMPACT (Annual):



MARKET SHARE IMPACT:



KEY METRICS:

- ⌚ Delivery time: 38 → 30 min
- ⬇️ Driver churn: 18% → 12%
- ⬆️ Order frequency: +7% per customer
- 👤 Uber One subscribers: 20M → 35M

EXECUTION TIMELINE:

- Months 1-3:** Build & pilot in 3 cities → **Months 4-6:** Prove results, expand to top 20 → **Months 7-12:** National rollout → **Months 13-18:** International + optimization

ROI: Invest \$93M → Earn \$503M profit = 541% return on investment



WHY UBER EATS WILL WIN

Strategy to leverage strengths, attack weaknesses, and fix gaps

🎯 PLAYS TO YOUR STRENGTHS:

- ✓ 202M monthly users globally
- ✓ 40M+ daily rides to cross-sell
- ✓ 45 countries (vs DoorDash's 30)
- ✓ \$1B+ quarterly EBITDA (can invest)
- ✓ Already leading in subscriptions (61%)

☒ ATTACKS DOORDASH WEAKNESSES:

- ✗ No ride ecosystem to leverage
- ✗ Restaurant-focused (not multi-category)
- ✗ Slower international expansion
- ✗ Can't copy Uber One bundle

🔧 FIXES YOUR GAPS:

- ✓ Driver trust → Supply stability
- ✓ Speed → Customer retention
- ✓ Ecosystem → Lock-in effect

🚀 **THE STRATEGY: Don't compete on restaurants alone → Win on ECOSYSTEM + SPEED + FAIRNESS**

DoorDash won by being faster in restaurants. Uber Eats wins by being everywhere in life.

The question isn't whether this works. The question is: How fast can we start?