DoorDash Counts Several Hundred AI Agent Orders as Websites Limit Access

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An agent is software that uses websites for you, and AI companies promise it will order dinner and buy shoes. On October 29, DoorDash CEO Tony Xu said agents from other companies, such as Meta's Muse, have brought "maybe several hundred orders in total" since they launched. DoorDash completed 993 million orders in the third quarter alone, so agents' share is under one order in a million. The same day, Reddit CEO Steve Huffman said search referrals, visits

from a Google results page, fell by more than 1 million a week on average in October. His main suspect is Google's AI answers. Reddit's revenue still rose 53% in a year, to $895 million.

Reddit says logged-in and app users account for over 80% of its monetization (what it earns from users). It will test a mostly login-only version outside the U.S., partly to limit scraping. The Verge reports that Yelp admits only agents whose makers pay for its data licensing program, Delta stops agents from booking tickets, and JPMorgan Chase and Charles Schwab block agents from accounts, citing security. Amazon said on September 20 that it had blocked Muse, which it says does not identify itself.

Robots.txt is the file where a site posts rules for automated visitors. Google plans to honor one shared line there that opts a site out of AI training. It is a request each company chooses to follow, not a block. Google aims to support it, along with other AI providers, in 2027.

Read More: AI This Week: A Chip in Orbit, Agent Machinery for Rent, and Models Under Watch and Agent-Reach: Give Your Agent Eyes on the Whole Internet, No API Fees

Sources:

- DoorDash (DASH) Q3 2026 Earnings Call Transcript (The Motley Fool)
- Reddit (RDDT) Q3 2026 Earnings Call Transcript (The Motley Fool)
- Websites are closing their doors to AI agents (The Verge)
- Amazon blocks Meta's Muse AI agent from shopping on its site (PPC Land)
- Supporting a shared AI training control for websites (Google Search Central Blog)

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