

BESPOKE SURVEYS

Food Delivery Vol 24

1500+ US Consumers Balanced to Census

CHECK BREAKDOWN:**TREND CHECKS****FOOD DELIVERY USAGE**

Food delivery usage increased considerably during the pandemic but has regressed in recent quarters since then. Usage remains above pre-Covid / early 2020 readings, however.

FEEES AND SATISFACTION

Overall consumer opinions toward food delivery apps are positive. We would note, though, that lower fees have become increasingly important to respondents who use food delivery apps and user sentiment toward most food delivery apps we track when it comes to fees has softened.

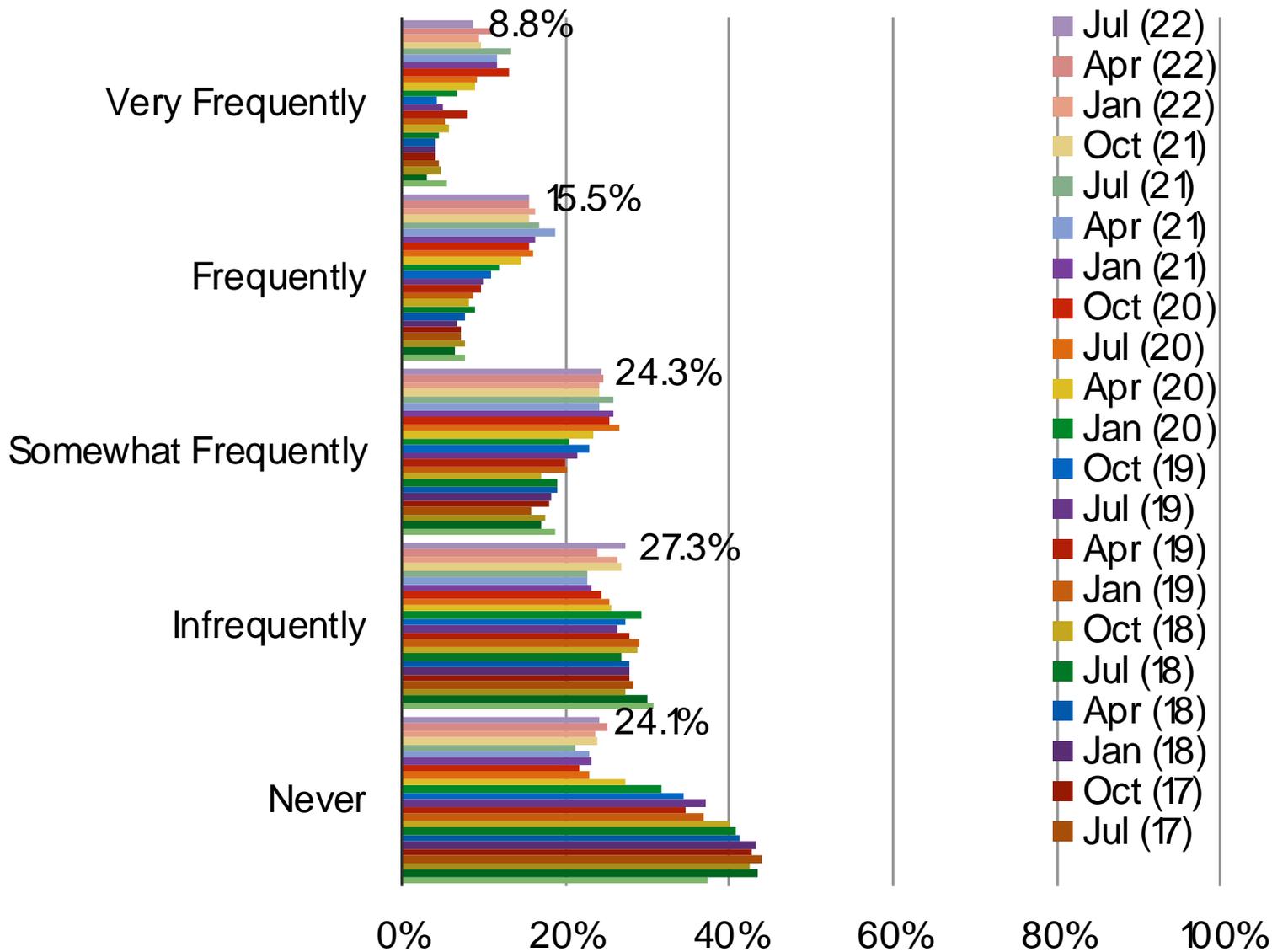
DOORDASH VS COMPETITORS

DoorDash continues to outperform competitors when it comes to app downloads and overall usage. Consumers did however rate DoorDash lower relative to competitors when it comes to fees.

USAGE TRENDS AND SENTIMENT READINGS

HOW OFTEN DO YOU ORDER FOOD THROUGH WEBSITES ONLINE OR THROUGH APPS?

Posed to all respondents.



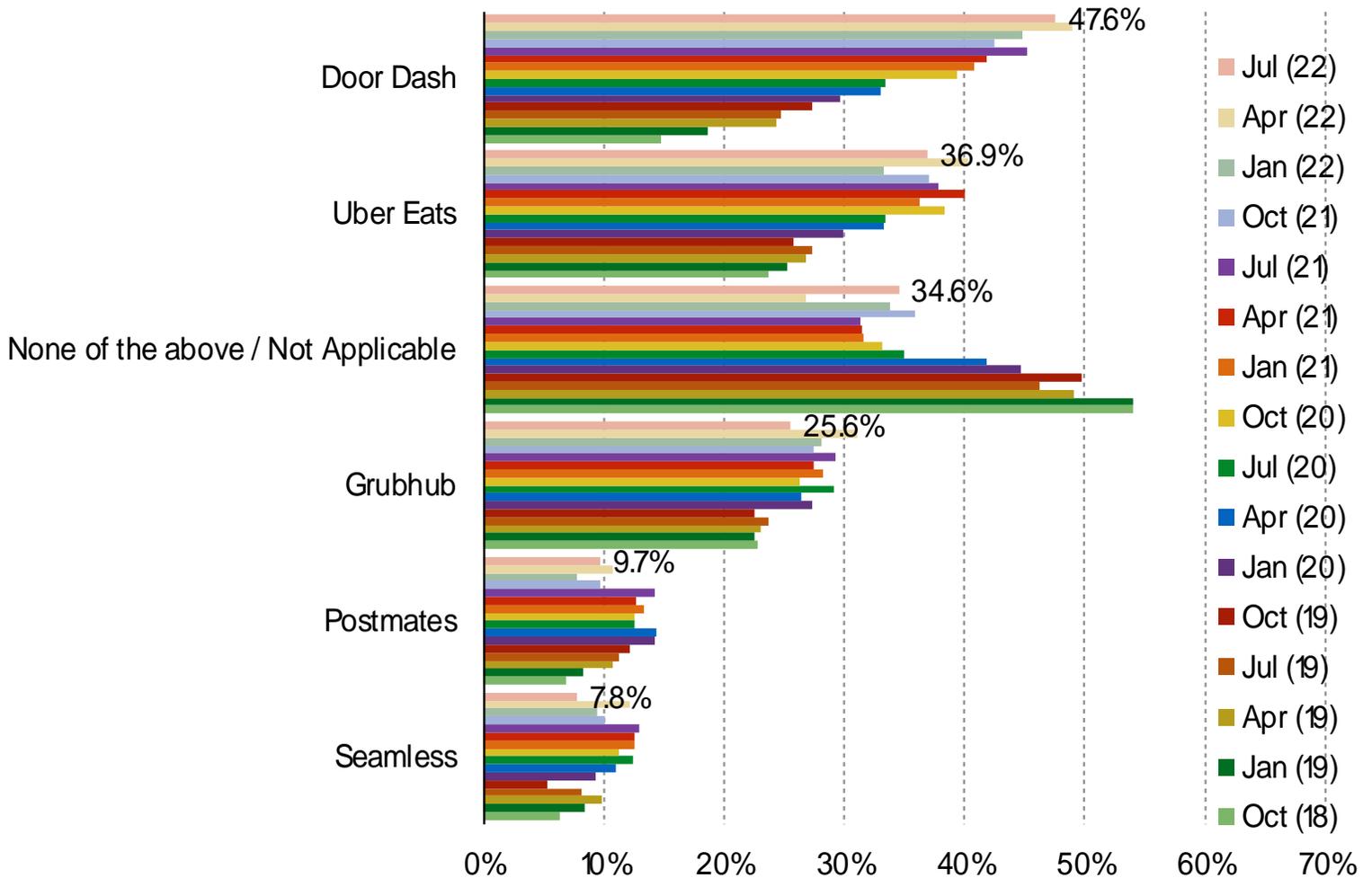
Food Delivery Apps

Audience: 1,000 US Consumers

Date: July 2022

DO YOU HAVE ANY OF THE FOLLOWING APPS DOWNLOADED ON YOUR SMARTPHONE?

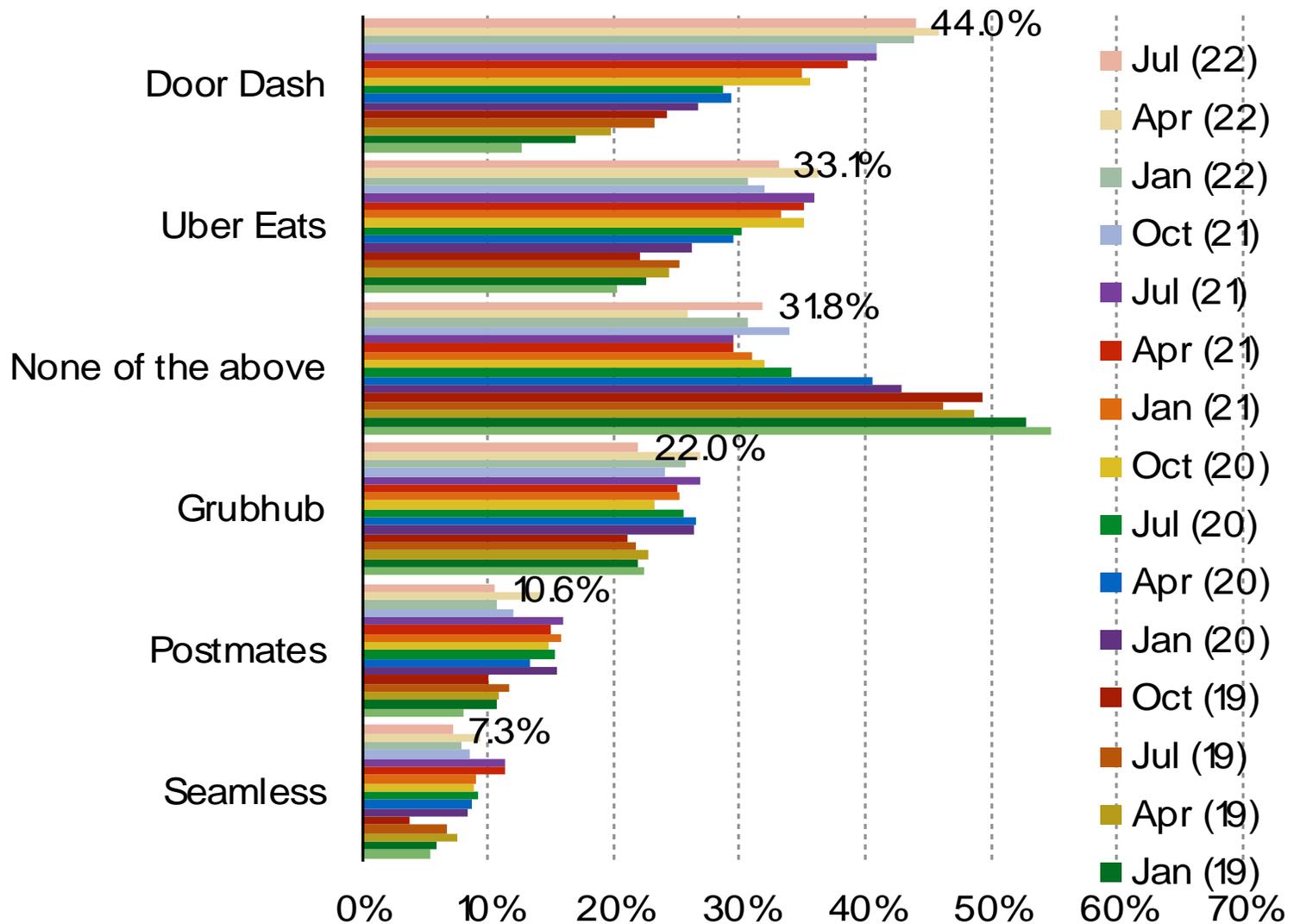
Posed to respondents who use food delivery apps.



N = 1154

DO YOU REGULARLY OR OCCASIONALLY USE ANY OF THE FOLLOWING PLATFORMS FOR ORDERING TAKEOUT FOOD DELIVERY?

Posed to respondents who use food delivery apps.



N = 1154

Food Delivery Apps

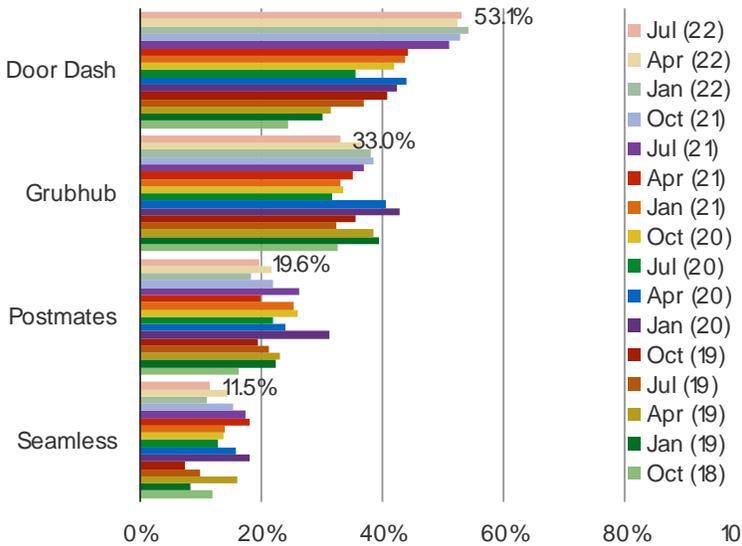
Audience: 1,000 US Consumers

Date: July 2022

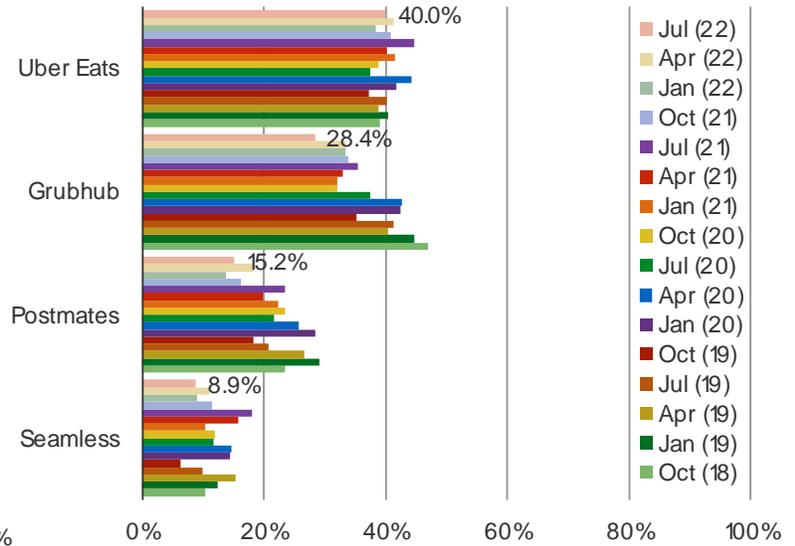
CROSS-OVER: REGULARLY OR OCCASIONALLY USES EACH OF THE FOLLOWING, WHAT OTHER PLATFORMS DO THEY ALSO USE REGULARLY OR OCCASIONALLY?

Posed to respondents who use food delivery apps.

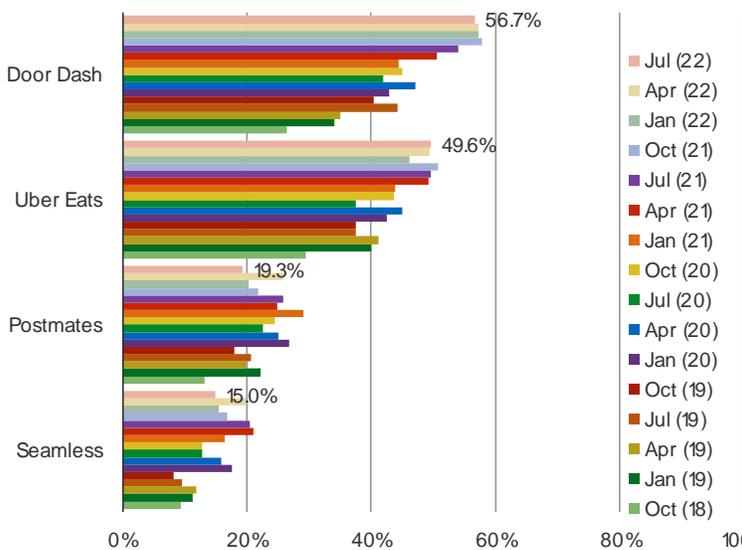
Uber Eats Users Also Use



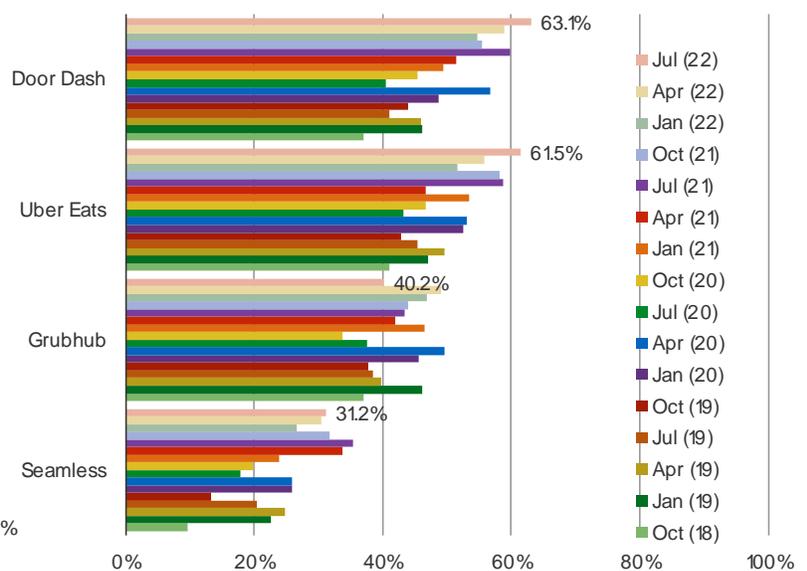
Door Dash Users Also Use



GrubHub Users Also Use



Postmates Users Also Use



	N=
Uber Eats	382
Door Dash	508
Seamless	84
Grubhub	254
Postmates	122

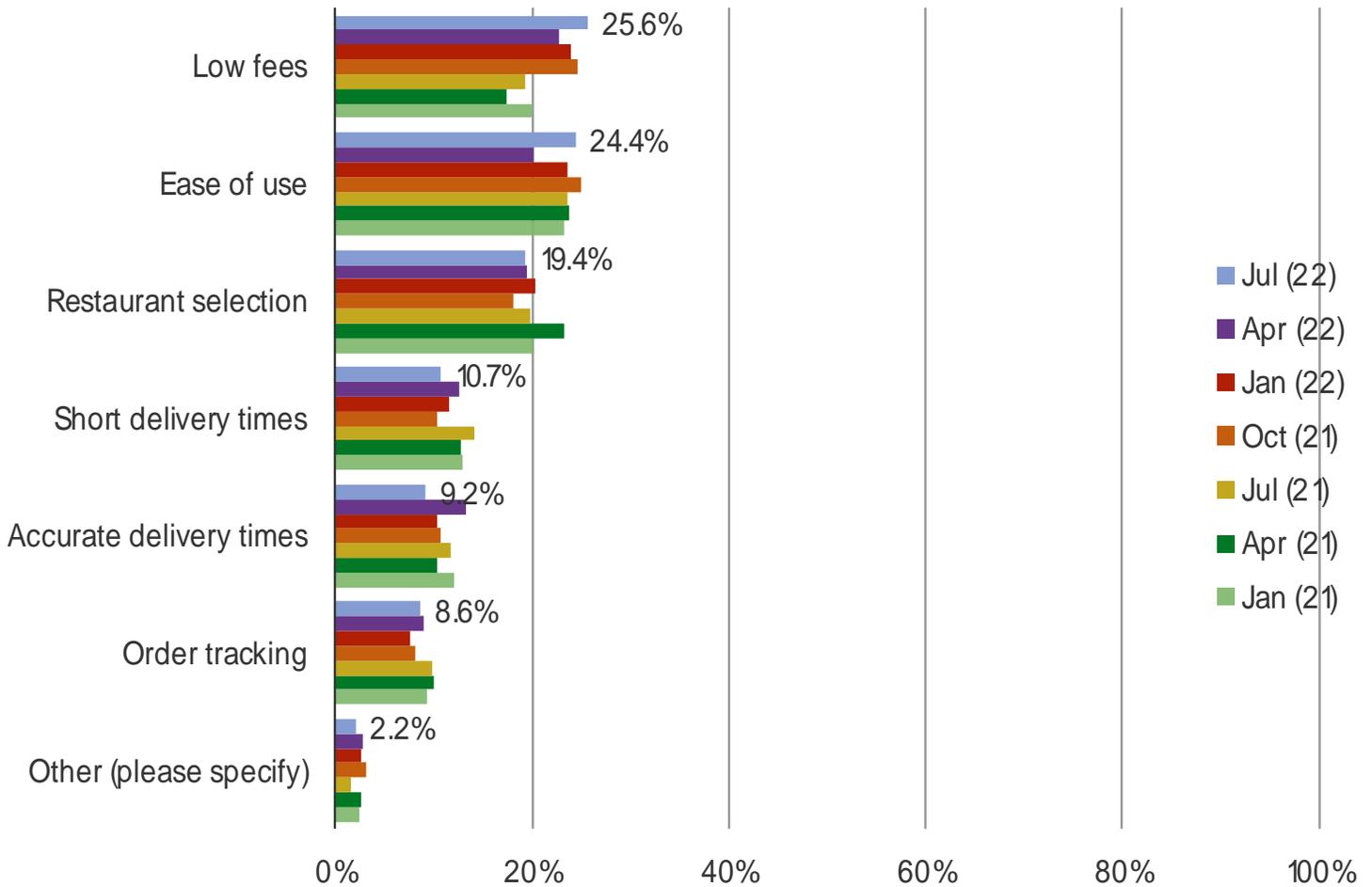
Food Delivery Apps

Audience: 1,000 US Consumers

Date: July 2022

WHAT IS THE MOST IMPORTANT FEATURE IN DECIDING WHICH FOOD DELIVERY/TAKEAWAY APP TO USE?

Posed to respondents who use food delivery apps.



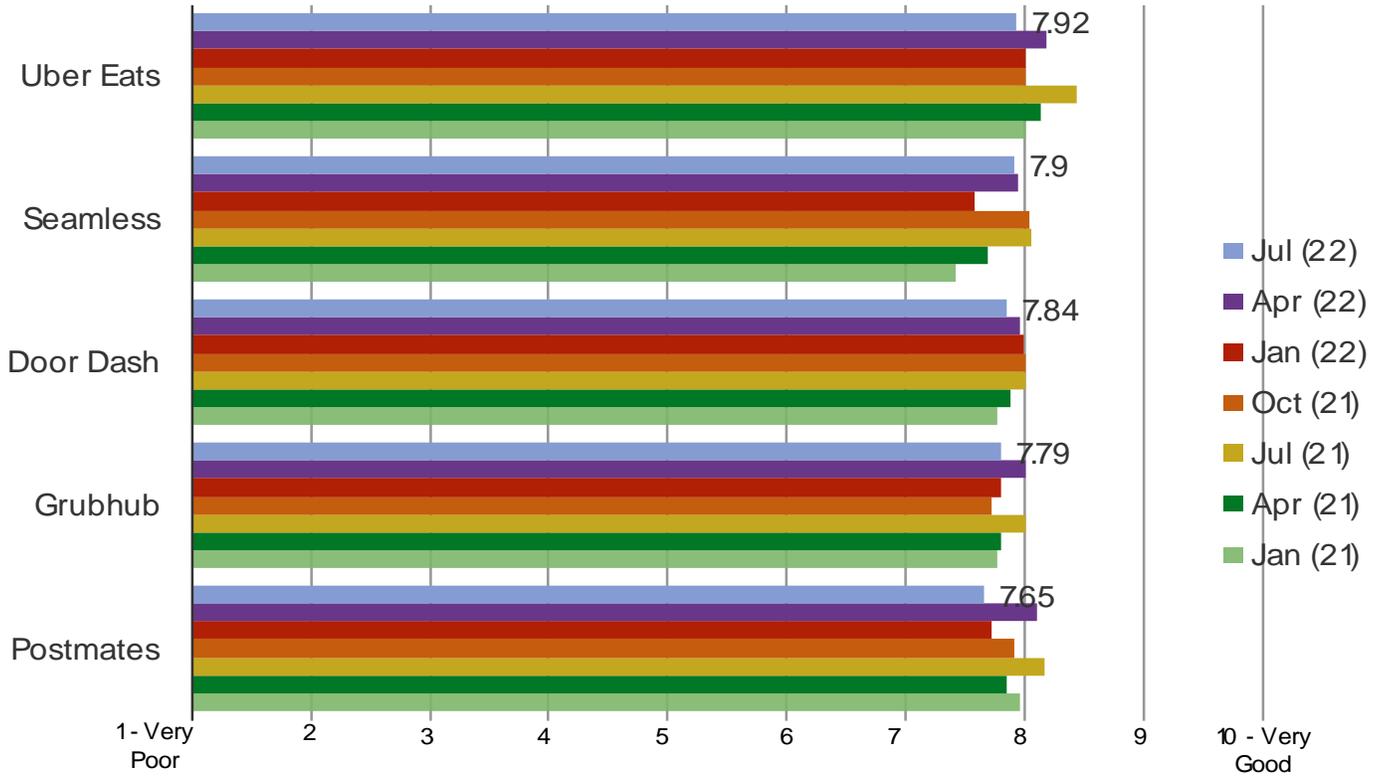
N = 1157

Food Delivery Apps

Audience: 1,000 US Consumers
Date: July 2022

PLEASE RATE HOW GOOD THE FOLLOWING ARE WHEN IT COMES TO USER EXPERIENCE:

Posed to respondents who have the following downloaded on their smartphone.



	N=
Uber Eats	426
Door Dash	549
Seamless	90
Grubhub	295
Postmates	112

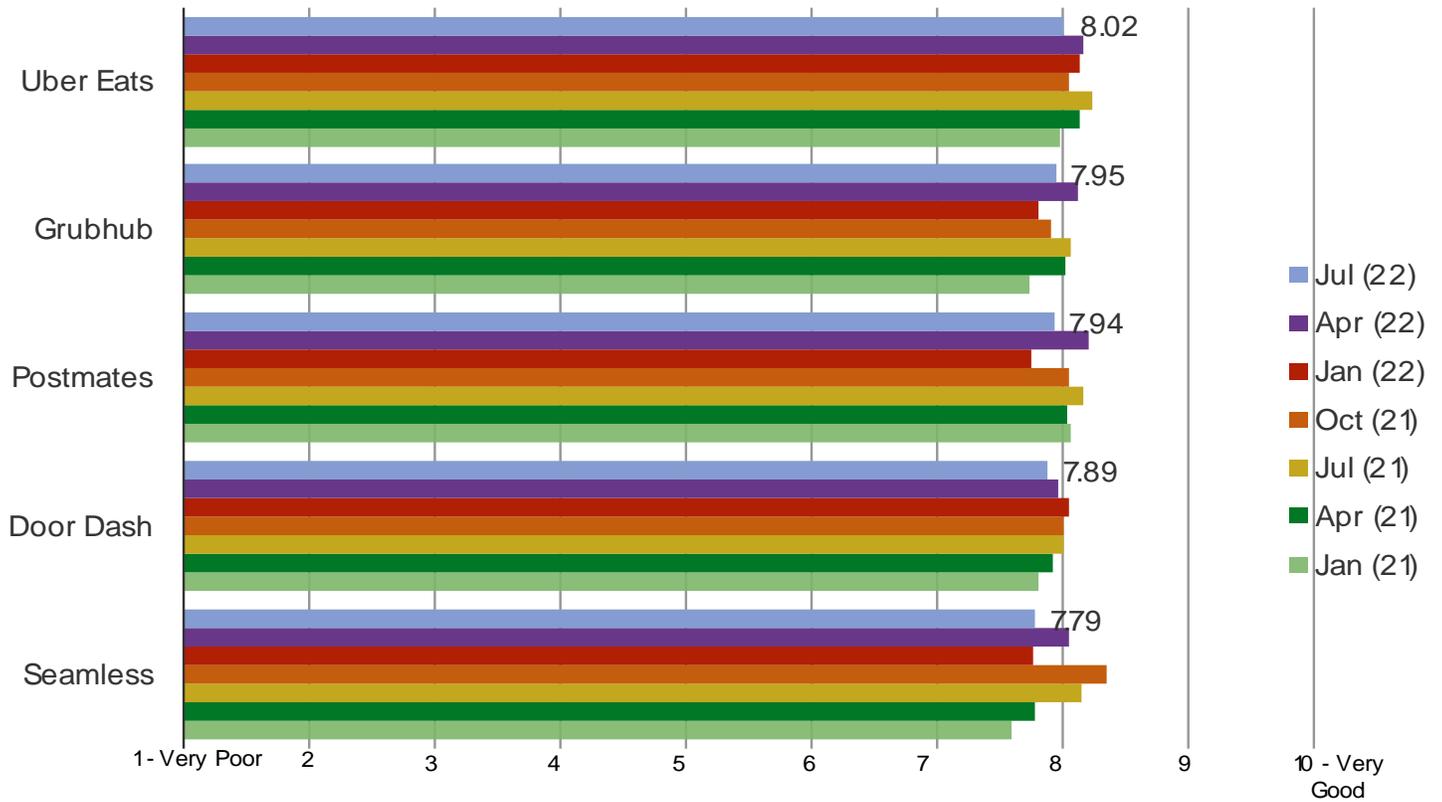
Food Delivery Apps

Audience: 1,000 US Consumers

Date: July 2022

PLEASE RATE THE FOLLOWING WHEN IT COMES TO RESTAURANT SELECTION:

Posed to respondents who have the following downloaded on their smartphone.



	N=
Uber Eats	426
Door Dash	549
Seamless	90
Grubhub	295
Postmates	112

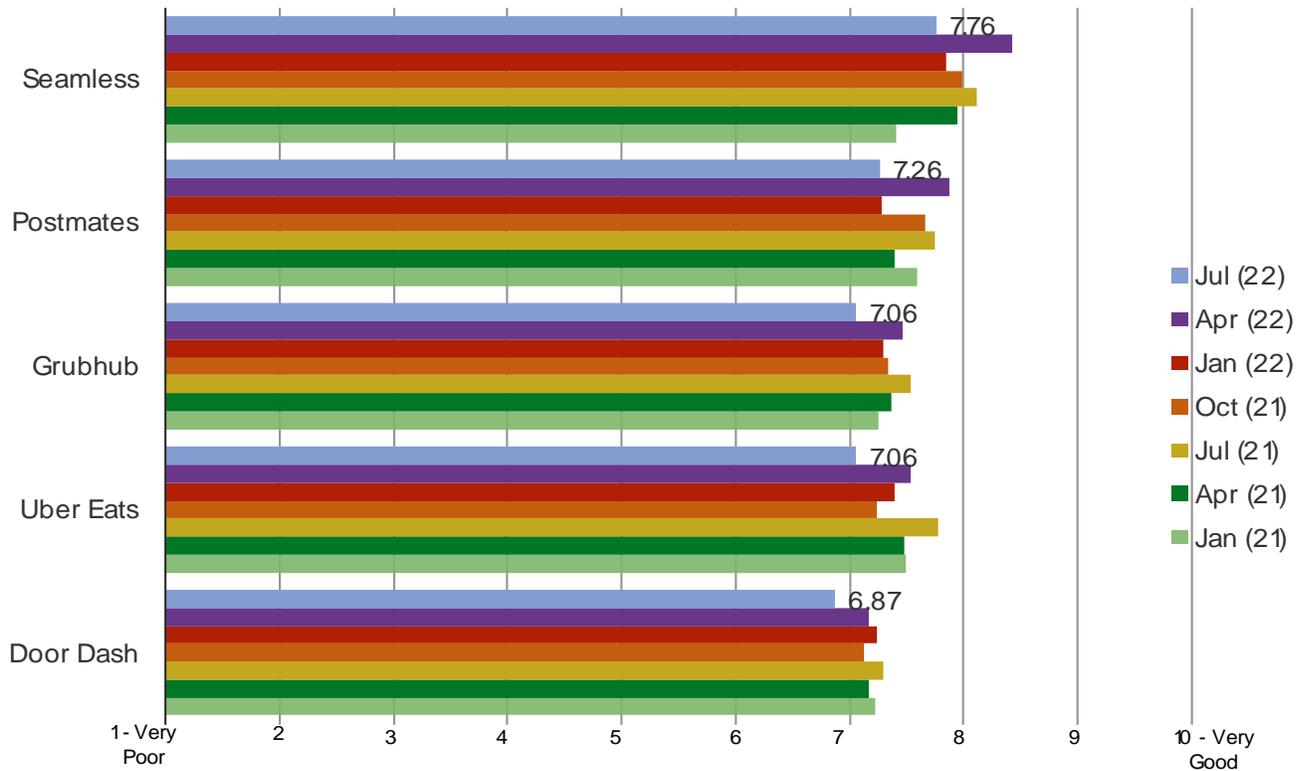
Food Delivery Apps

Audience: 1,000 US Consumers

Date: July 2022

PLEASE RATE THE FOLLOWING WHEN IT COMES TO FEES...

Posed to respondents who have the following downloaded on their smartphone.



	N=
Uber Eats	426
Door Dash	549
Seamless	90
Grubhub	295
Postmates	112

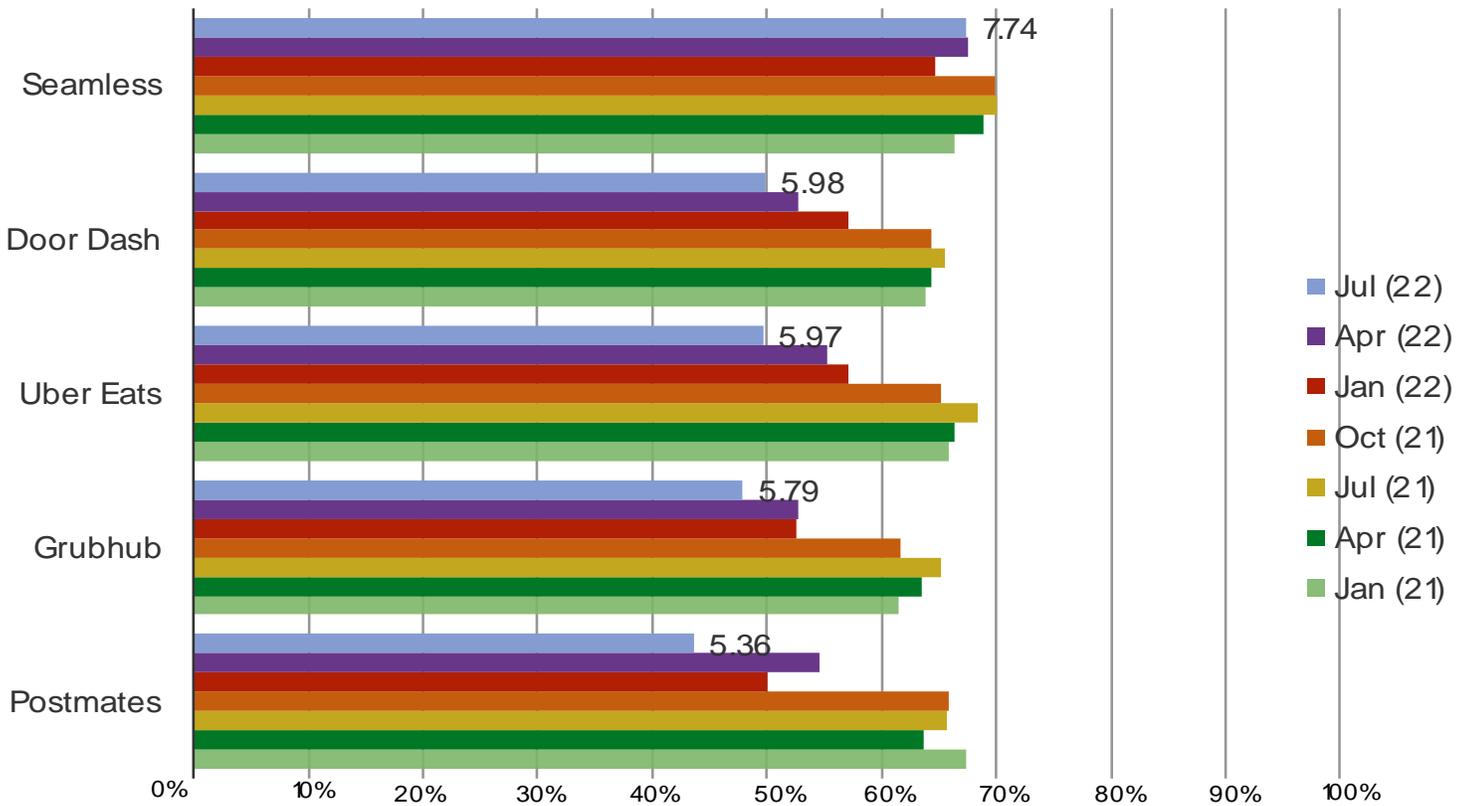
Food Delivery Apps

Audience: 1,000 US Consumers

Date: July 2022

WHAT PERCENTAGE OF YOUR FOOD DELIVERY/TAKEAWAY ORDERS DO YOU MAKE THROUGH THE FOLLOWING?

Posed to respondents who have the following downloaded on their smartphone.



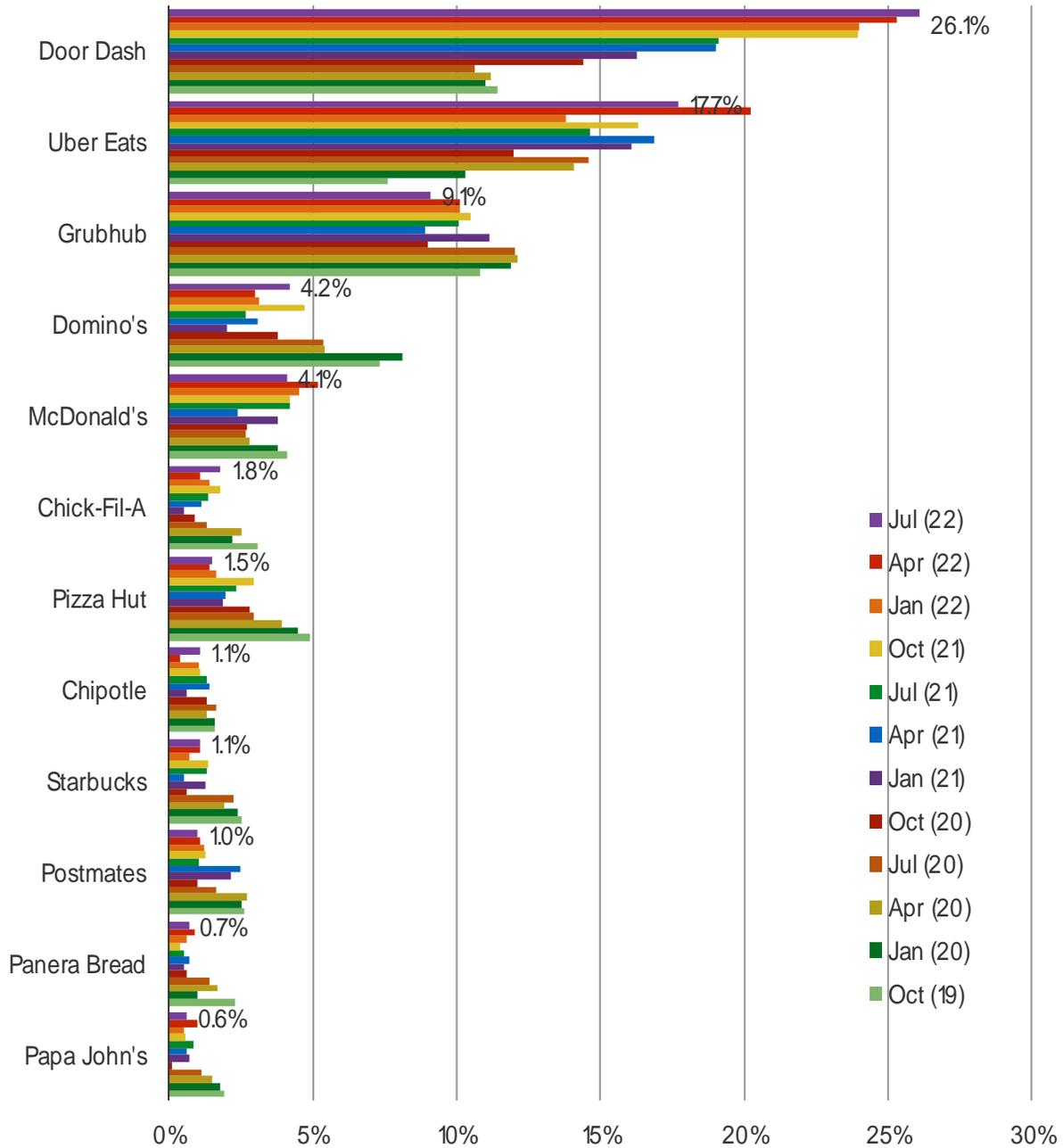
	N=
Uber Eats	426
Door Dash	549
Seamless	90
Grubhub	295
Postmates	112

Food Delivery Apps

Audience: 1,000 US Consumers
Date: July 2022

WHAT IS YOUR FAVORITE APP FOR ORDERING FOOD? (FILL-IN)

Posed to respondents who use food delivery apps.



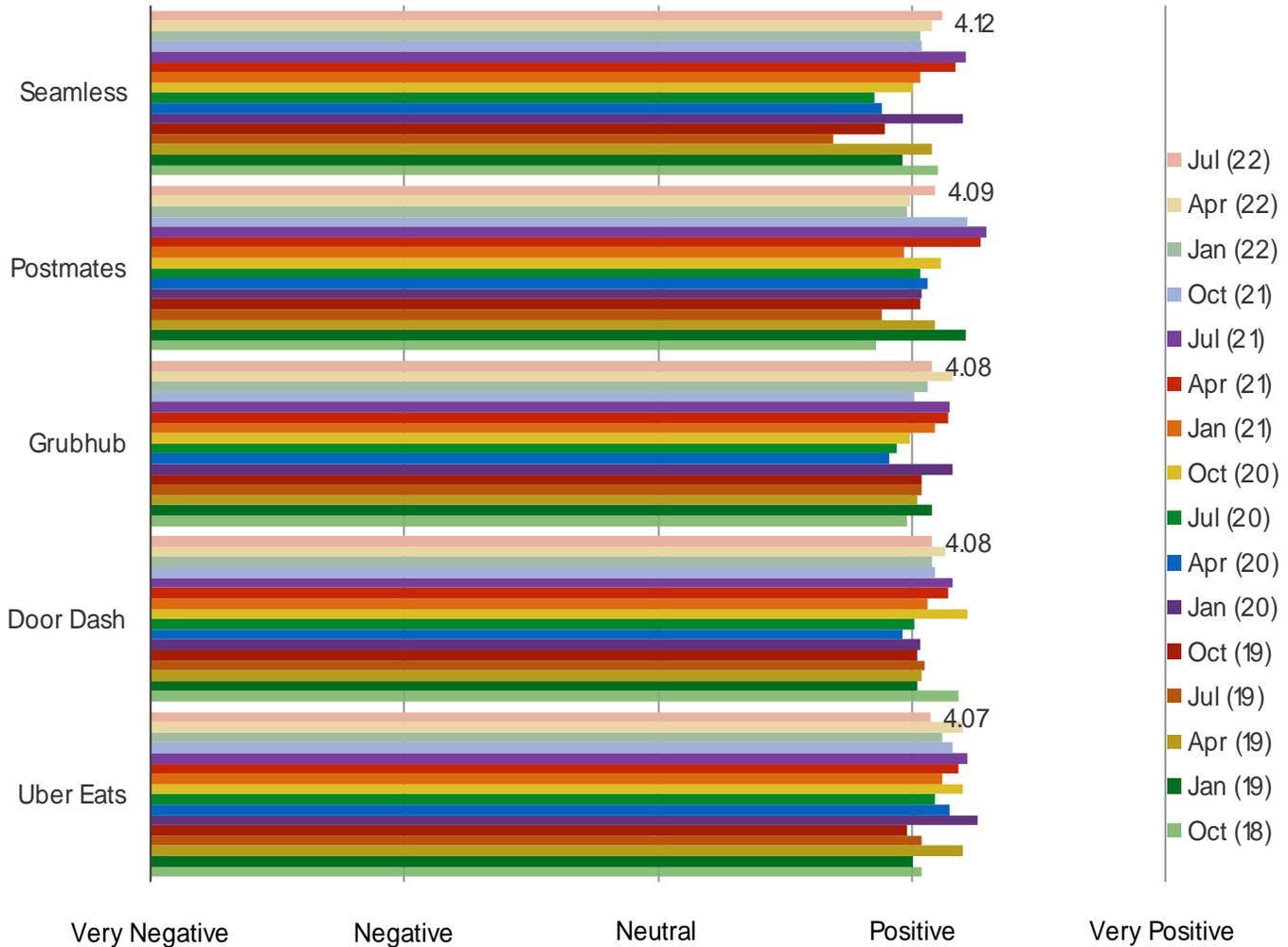
Food Delivery Apps

Audience: 1,000 US Consumers

Date: July 2022

WHAT IS YOUR OPINION OF THE PLATFORM?

Posed to respondents who regularly or occasionally use each of the following apps.



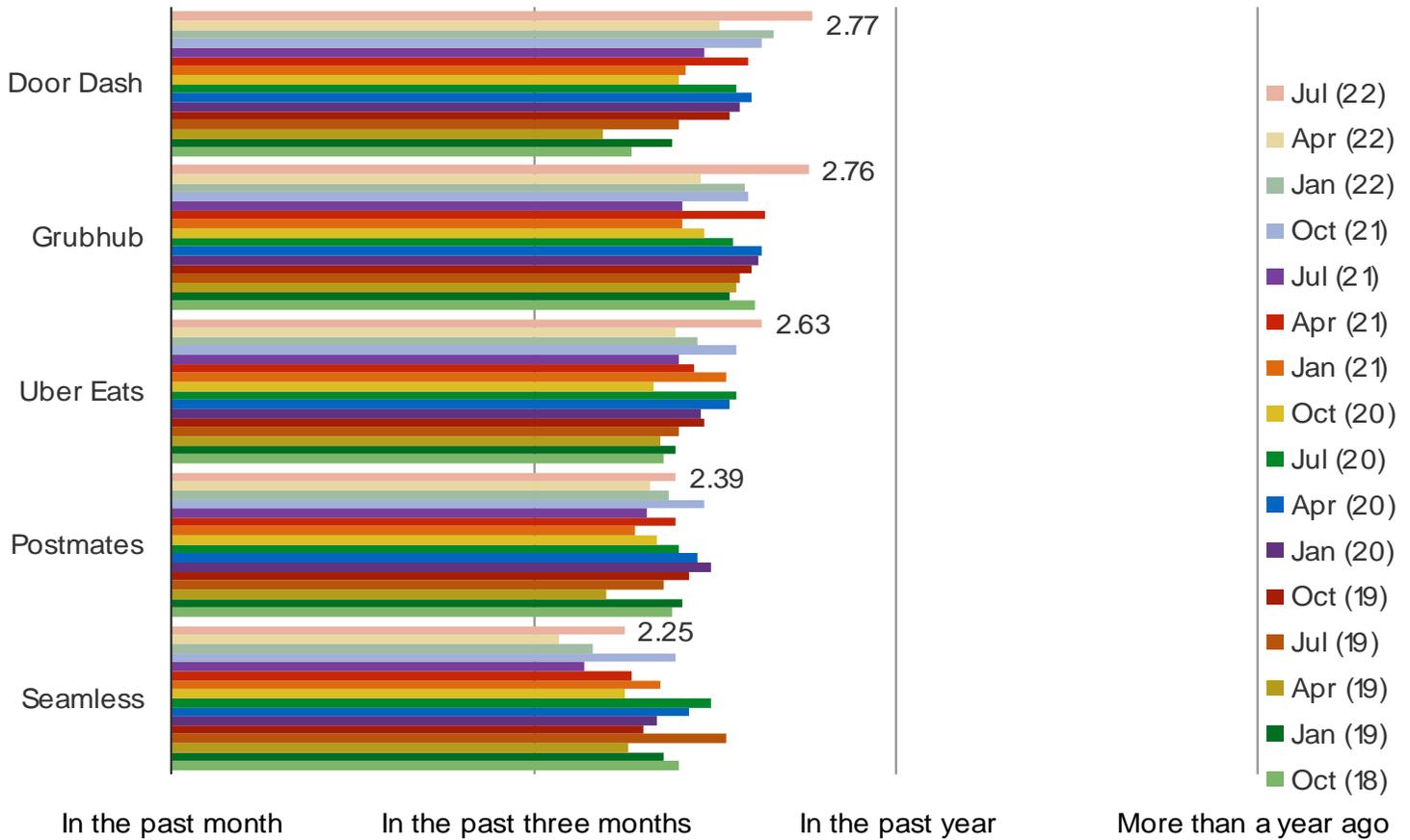
	N=
Uber Eats	382
Door Dash	508
Seamless	84
Grubhub	254
Postmates	122

Food Delivery Apps

Audience: 1,000 US Consumers
Date: July 2022

WHEN DID YOU FIRST START USING THIS PLATFORM?

Posed to respondents who regularly or occasionally use each of the following apps.



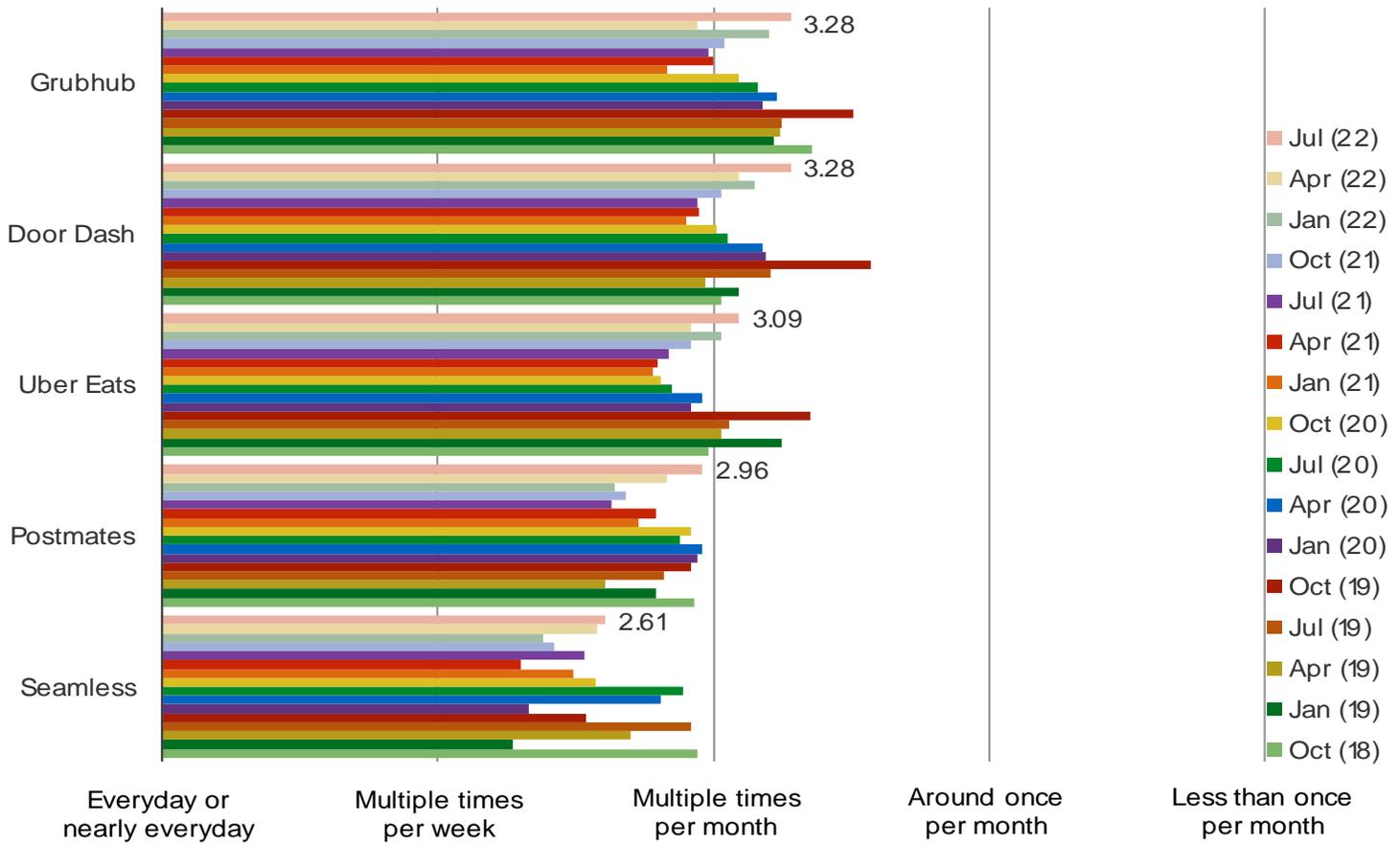
	N=
Uber Eats	382
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Grubhub	254
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Food Delivery Apps

Audience: 1,000 US Consumers
Date: July 2022

HOW OFTEN DO YOU ORDER FOOD THROUGH THIS PLATFORM?

Posed to respondents who regularly or occasionally use each of the following apps.



More Frequent

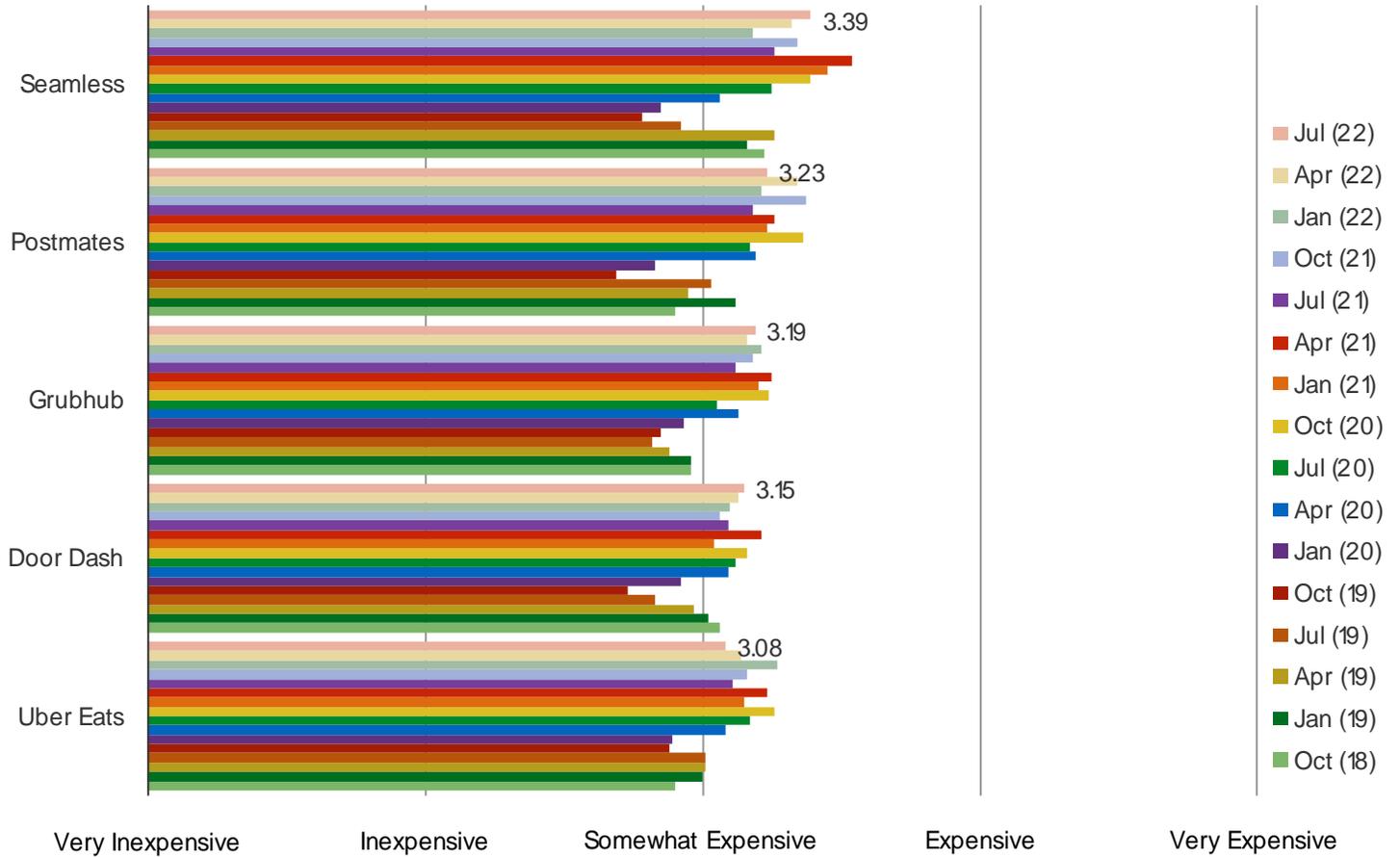
	N=
Uber Eats	382
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Food Delivery Apps

Audience: 1,000 US Consumers
Date: July 2022

PLEASE RATE THE FOLLOWING WHEN IT COMES TO THE PRICE IT COSTS FOR DELIVERY (DELIVERY CHARGES PLUS ANY TIPS YOU DECIDE TO ADD)

Posed to respondents who regularly or occasionally use each of the following apps.



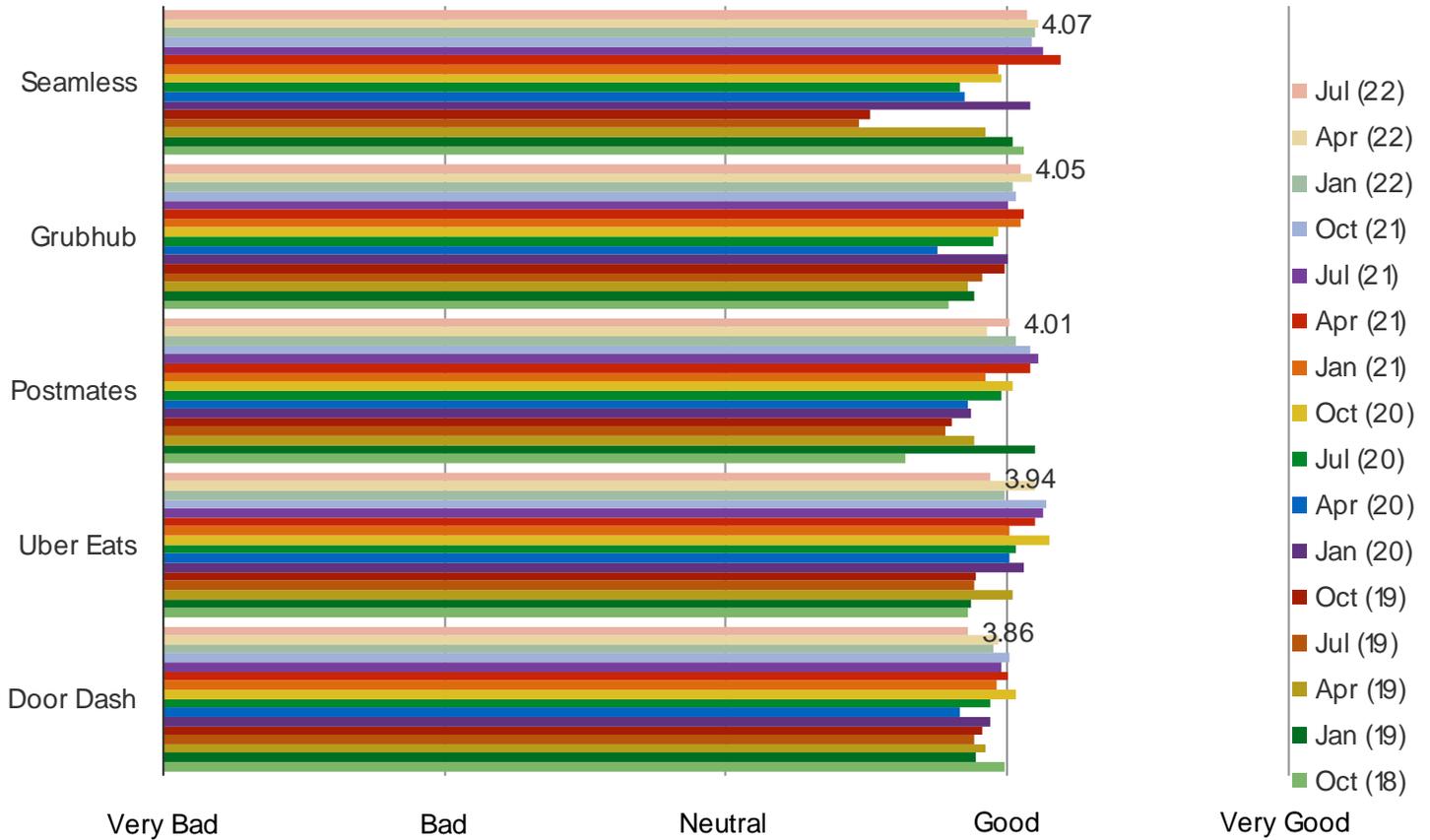
	N=
Uber Eats	382
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Food Delivery Apps

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PLEASE RATE THE FOLLOWING WHEN IT COMES TO SPEED AND ACCURACY OF SERVICE.

Posed to respondents who regularly or occasionally use each of the following apps.

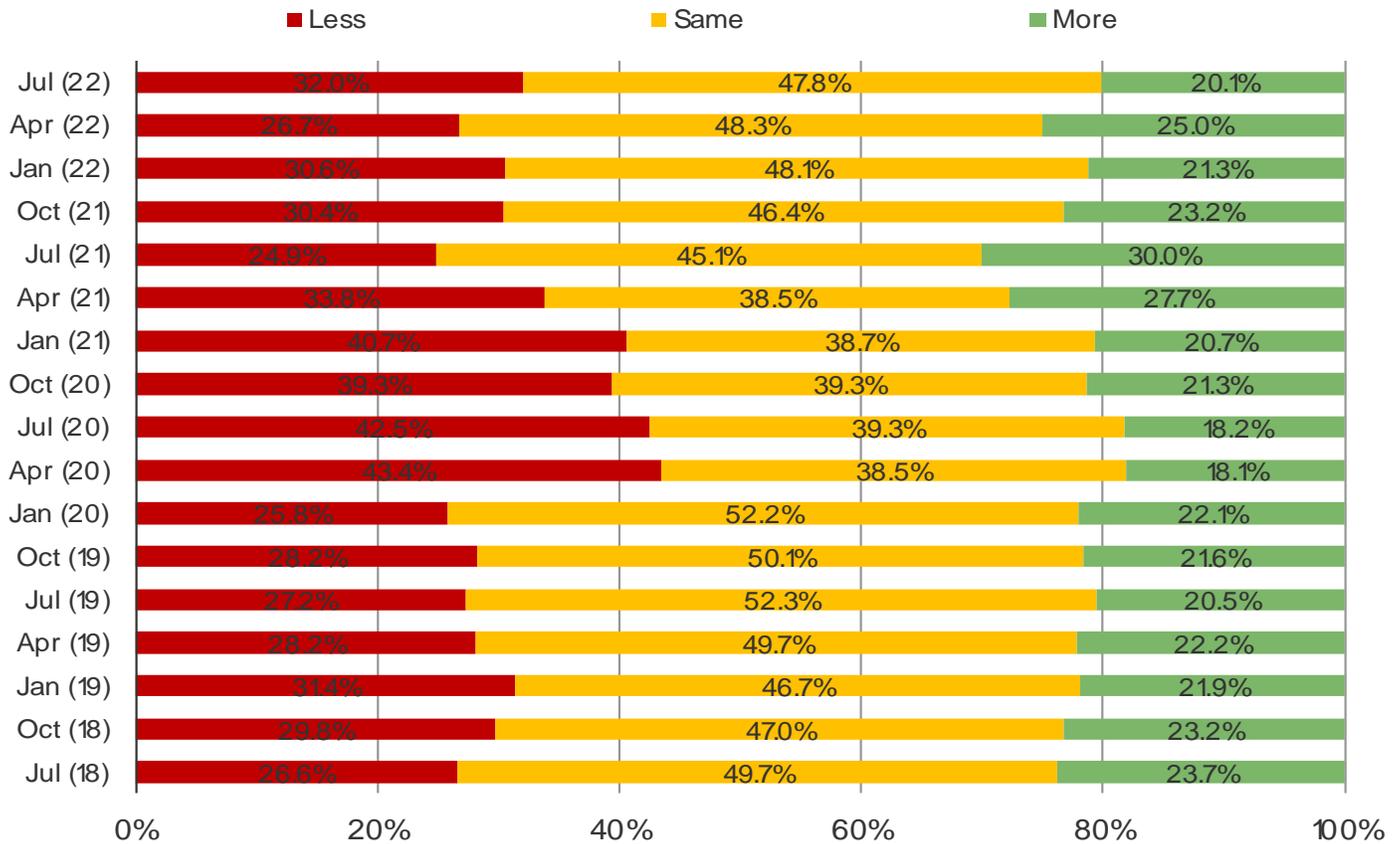


	N=
Uber Eats	382
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CASUAL DINING TRENDS

COMPARED TO A YEAR AGO, ARE YOU EATING AT FAST CASUAL / FAST FOOD RESTAURANTS MORE OR LESS?

Posed to all respondents.



Food Delivery Apps

Audience: 1,000 US Consumers

Date: July 2022

HOW OFTEN DO YOU ORDER FOOD FROM HERE FOR DELIVERY THROUGH THIRD PARTY FOOD DELIVERY APPS LIKE UBER EATS, GRUBHUB, POSTMATES, ETC?

Posed to respondents who regularly or occasionally eat from each of the following.

	Never	I tried it once or twice, but not again since	Occasionally	Regularly/Often	Total	Weighted Average
Shake Shack	23.08%	12.09%	36.26%	28.57%	91	2.7
Wingstop	28.46%	21.14%	28.46%	21.95%	123	2.44
Cheddar's Scratch Kitchen	39.39%	16.67%	22.73%	21.21%	66	2.26
Papa John's	43.63%	8.49%	27.03%	20.85%	259	2.25
Pizza Hut	43.86%	11.75%	22.98%	21.41%	383	2.22
Ruby Tuesday	42.53%	13.79%	25.29%	18.39%	87	2.2
Cheese Cake Factory	44.36%	9.02%	30.83%	15.79%	133	2.18
Buffalo Wild Wings	43.33%	10.95%	30.95%	14.76%	210	2.17
Chipotle	45.23%	12.01%	27.21%	15.55%	283	2.13
Popeye's	48.01%	10.26%	23.51%	18.21%	302	2.12
Red Robbin	46.09%	17.19%	19.53%	17.19%	128	2.08
Chili's	50.00%	13.16%	19.47%	17.37%	190	2.04
IHOP	46.15%	15.93%	28.57%	9.34%	182	2.01
KFC	54.18%	8.11%	20.53%	17.18%	419	2.01
Appleby's	52.83%	11.32%	22.17%	13.68%	212	1.97
Chick-fil-A	53.40%	9.90%	23.50%	13.20%	515	1.97
McDonald's	54.61%	9.67%	22.98%	12.74%	879	1.94
Sonic	55.61%	9.42%	21.08%	13.90%	223	1.93
Taco Bell	55.57%	10.14%	21.45%	12.84%	592	1.92
Burger King	56.44%	10.93%	18.34%	14.29%	567	1.9
Wendy's	57.49%	8.89%	21.08%	12.54%	574	1.89
Starbucks	57.39%	9.57%	20.58%	12.46%	345	1.88
Texas Roadhouse	55.71%	11.90%	21.43%	10.95%	210	1.88
Dunkin Donuts	57.82%	10.03%	19.47%	12.68%	339	1.87
Olive Garden	58.44%	11.36%	21.43%	8.77%	308	1.81
Panera	59.92%	12.06%	16.73%	11.28%	257	1.79
Longhorn Steakhouse	65.33%	7.33%	15.33%	12.00%	150	1.74
Cracker Barrel	66.48%	9.66%	18.75%	5.11%	176	1.63

Food Delivery Apps

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Date: July 2022

WHEN YOU ORDER FROM THIS RESTAURANT THROUGH THIRD PARTY FOOD DELIVERY APPS, ARE THESE ORDERS THAT YOU WOULD HAVE GOTTEN ANYWAY OR ARE THEY ADDITIONAL?

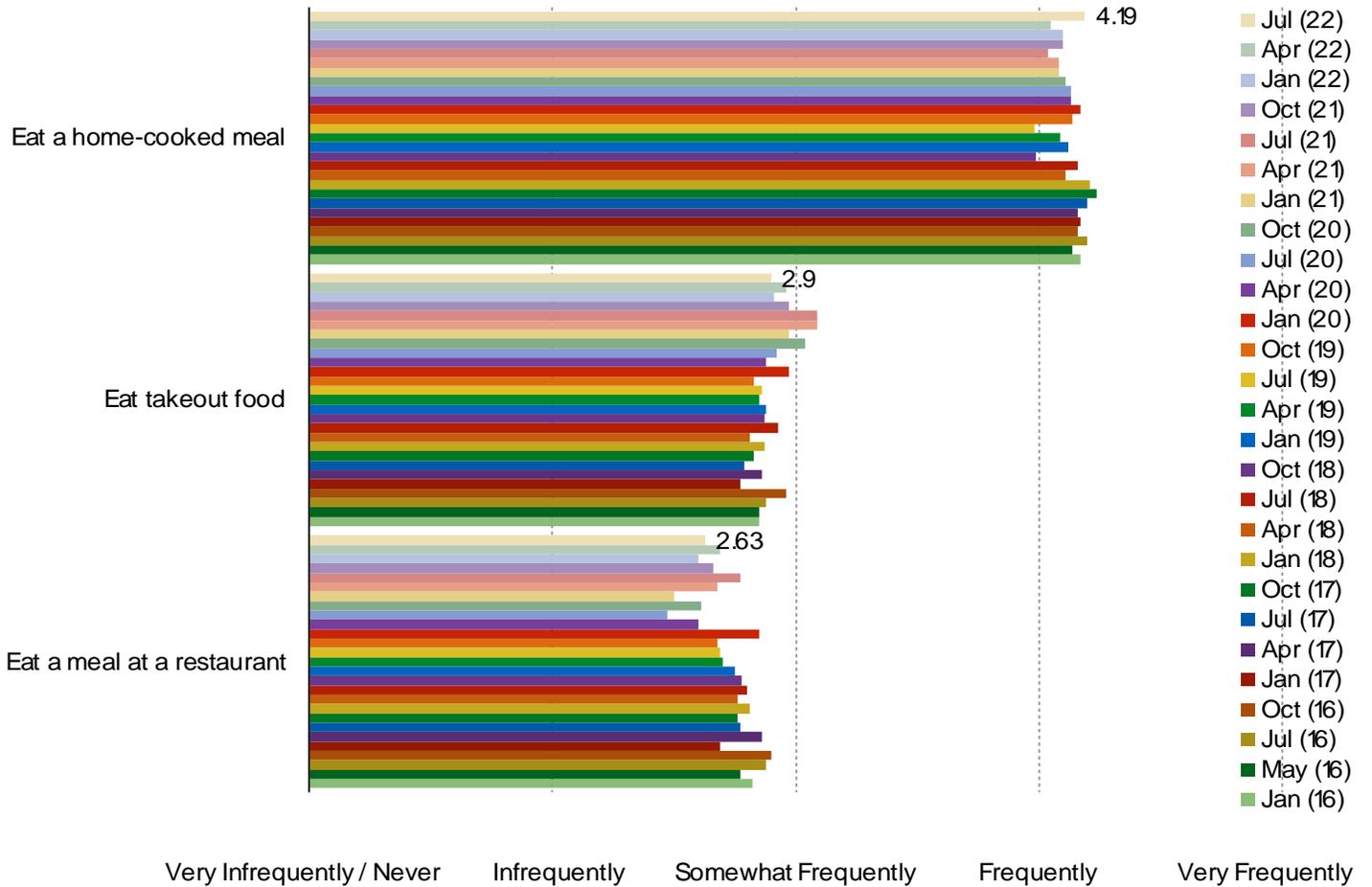
Posed to respondents who regularly or occasionally eat from each of the following AND order this restaurant through third party food delivery apps more than never.

	These orders are additional	I would have gotten food from here anyway	N Size
Ruby Tuesday	57.89%	42.11%	38
Cheddar's Scratch Kitchen	55.17%	44.83%	29
Panera	51.39%	48.61%	72
IHOP	46.38%	53.62%	69
Red Robbin	44.68%	55.32%	47
Shake Shack	44.07%	55.93%	59
Burger King	43.78%	56.22%	185
Cracker Barrel	42.86%	57.14%	42
Longhorn Steakhouse	39.02%	60.98%	41
Chili's	38.57%	61.43%	70
Sonic	38.46%	61.54%	78
Pizza Hut	38.24%	61.76%	170
Popeye's	38.10%	61.90%	126
Starbucks	37.72%	62.28%	114
Olive Garden	37.63%	62.37%	93
Buffalo Wild Wings	37.50%	62.50%	96
Cheese Cake Factory	37.10%	62.90%	62
Papa John's	37.10%	62.90%	124
Dunkin Donuts	36.70%	63.30%	109
Wendy's	34.72%	65.28%	193
Chipotle	33.88%	66.12%	121
Taco Bell	33.50%	66.50%	203
KFC	32.91%	67.09%	158
Texas Roadhouse	32.35%	67.65%	68
Wingstop	32.26%	67.74%	62
Appleby's	31.58%	68.42%	76
Chick-fil-A	31.22%	68.78%	189
McDonald's	31.21%	68.79%	314

CASUAL DINING OVERALL

IN A TYPICAL WEEK, HOW OFTEN DO YOU DO THE FOLLOWING?

Posed to all respondents.



HOW OFTEN DO YOU VISIT FAST FOOD / FAST CASUAL DINING RESTAURANTS?

Posed to all respondents.

