

CHECK BREAKDOWN:**FOOD DELIVERY USAGE: INCREASED Y/Y, BUT SOFTER Q/Q**

Usage of food delivery apps is strong overall and has increased considerably over the past 1-1.5 years. That said, the data pulled back this quarter relative to recent series highs.

DOORDASH

DoorDash continues to score highly when it comes to overall usage, restaurant selection, and user experience.

SATISFACTION WITH PLATFORMS IS STRONG

Opinions for all of the major platforms remain very positive. Consumers rate the speed and accuracy of service highly for all players in the space.

SENTIMENT TOWARD COST

Over time, the percentage of platform users who view it as expensive has increased. That trend moderated q/q, though, and respondents continue to see value in using the platforms.

DEMOGRAPHIC ADOPTION CURVES AND WFH

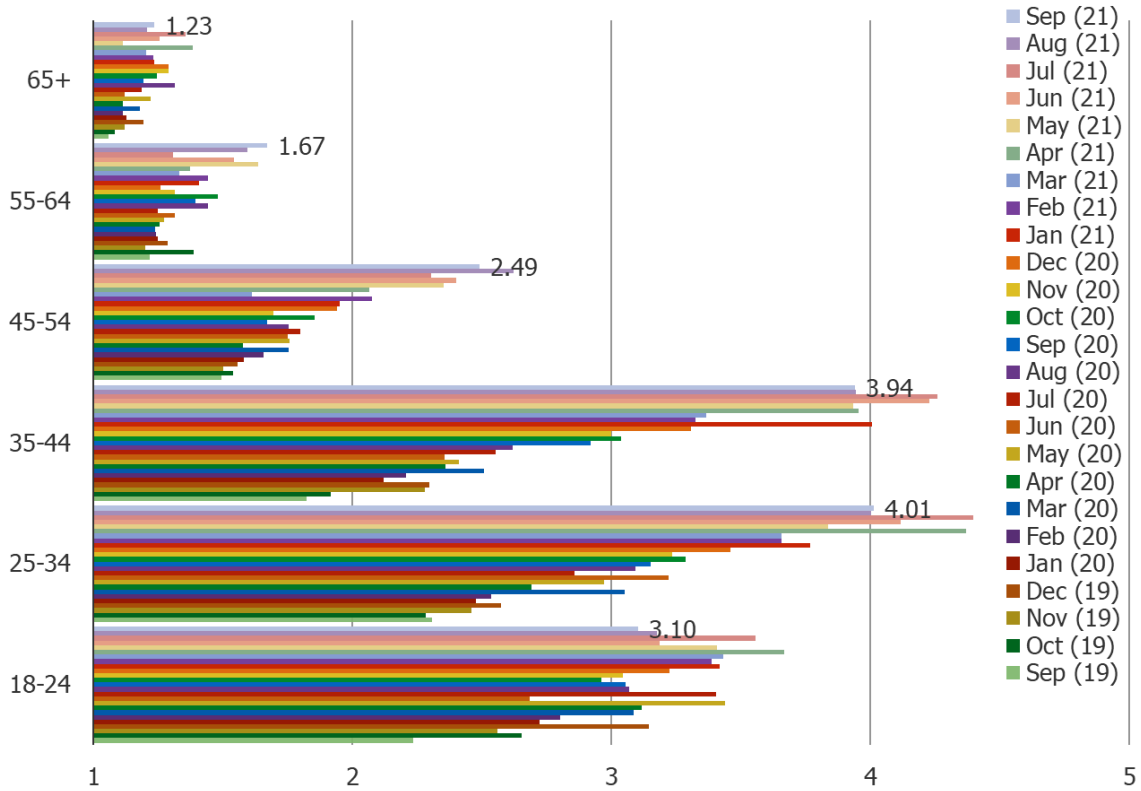
Adoption of platforms has been driven (especially since the start of this year) by the 25-44 cohort. That said, virtually all age cohorts have increased adoption. A noteworthy trend this quarter – employed respondents working from home increased usage sequentially, but employed respondents NOT working from home pulled back a bit in usage frequency sequentially. In all cases usage is strong and better y/y, but the recent sequential movement is worth noting.

ADOPTION CURVES: BY AGE AND WFH

Food Delivery Apps

Audience: 1,000 US Consumers
Date: October 2021

HOW OFTEN DO YOU USE FOOD DELIVERY APPS (CROSS-TABBED BY AGE)



Weighted Average Calculation:

- 1 = Never
- 2 = Less than once per month
- 3 = Once or twice a month
- 4 = Around once a week
- 5 = Multiple times per week
- 6 = Around once a day
- 7 = Multiple times per day

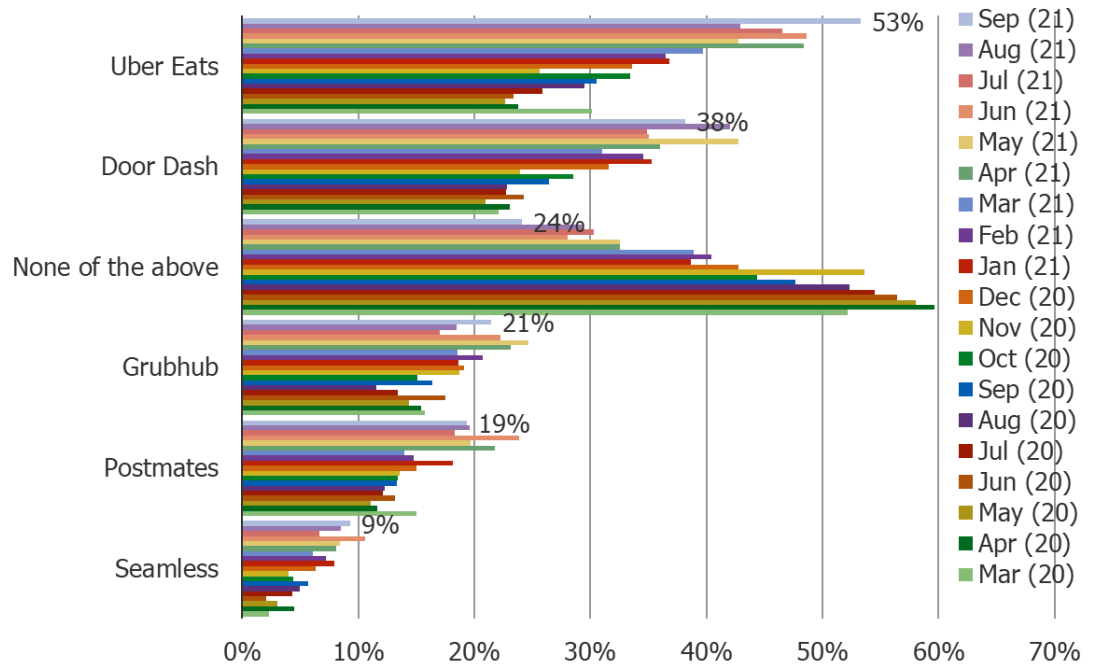
Food Delivery Apps

Audience: 1,000 US Consumers

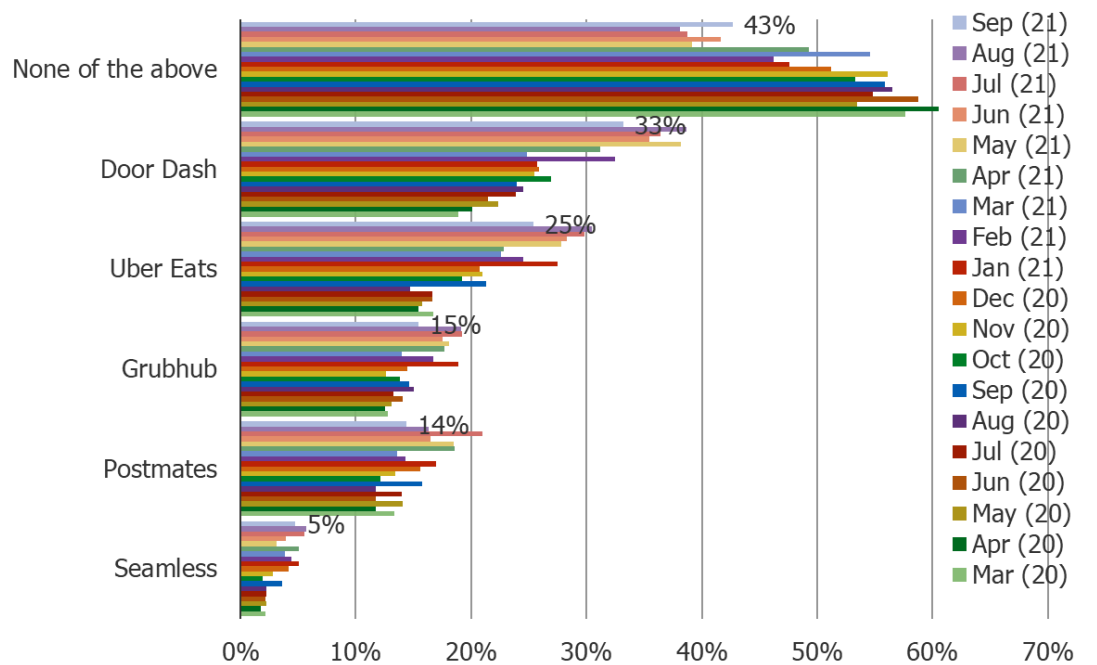
Date: October 2021

% OF CONSUMERS WHO USE THE FOLLOWING FOOD DELIVERY APPS REGULARLY OR OCCASIONALLY – CROSS-TABBED BY IF THEY ARE WORKING FROM HOME OR NOT

Employed and Working From Home



Employed and Not Working From Home

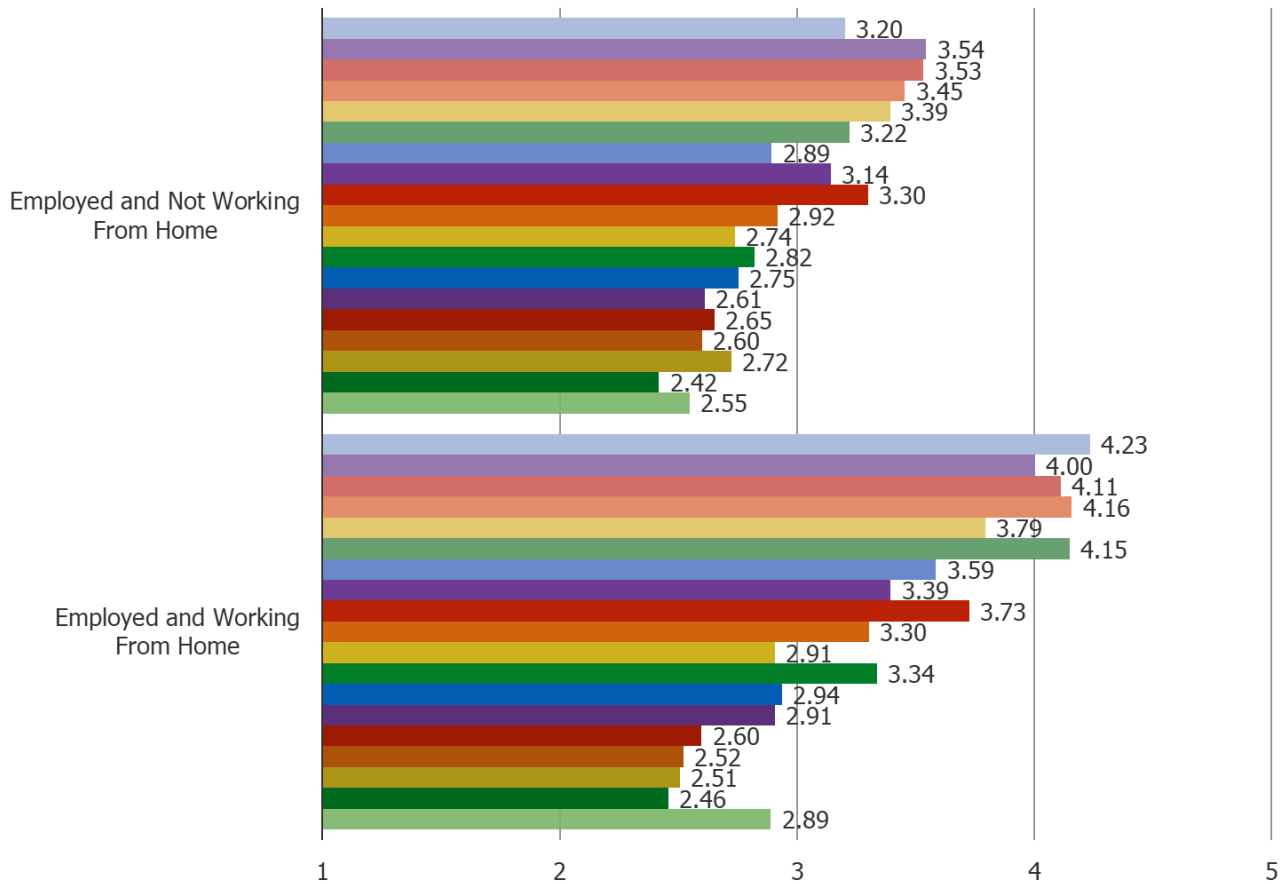


Food Delivery Apps

Audience: 1,000 US Consumers

Date: October 2021

USAGE OF FOOD DELIVERY APPS IN GENERAL – CROSS-TABBED BY IF THEY ARE WORKING FROM HOME OR NOT

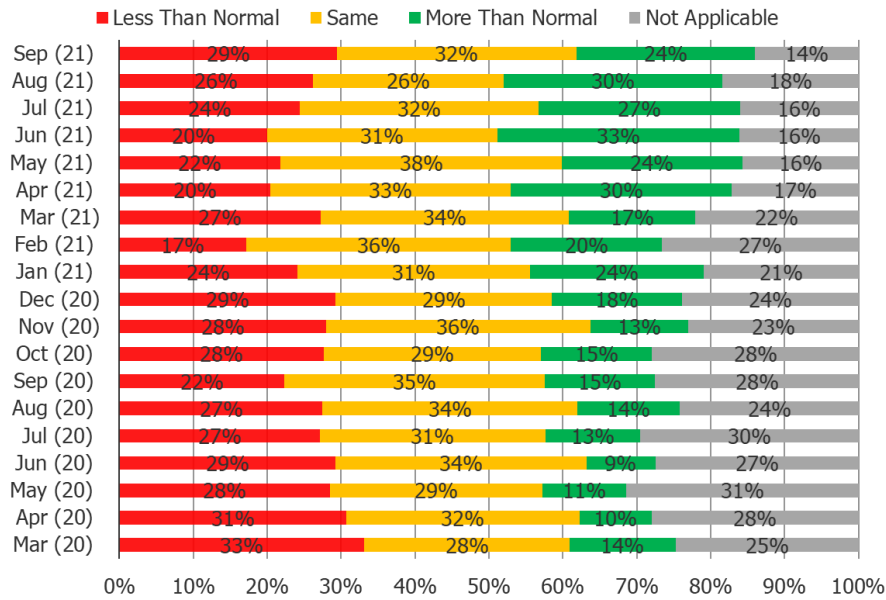


Weighted Average Calculation:

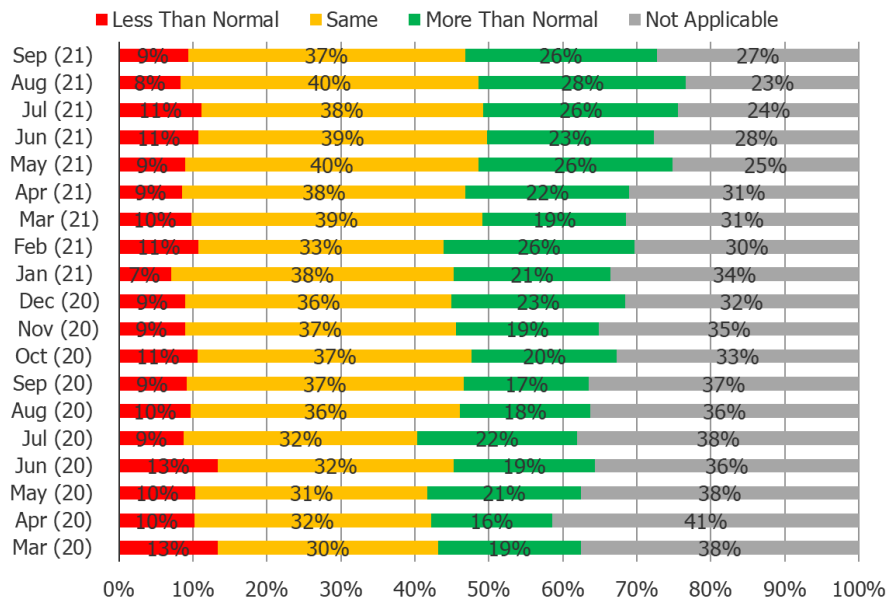
- 1 = Never
- 2 = Less than once per month
- 3 = Once or twice a month
- 4 = Around once a week
- 5 = Multiple times per week
- 6 = Around once a day
- 7 = Multiple times per day

GOING FORWARD, DO YOU EXPECT TO USE FOOD DELIVERY APPS MORE OR LESS THAN NORMAL BECAUSE OF COVID?

Respondents who are employed and working from home.



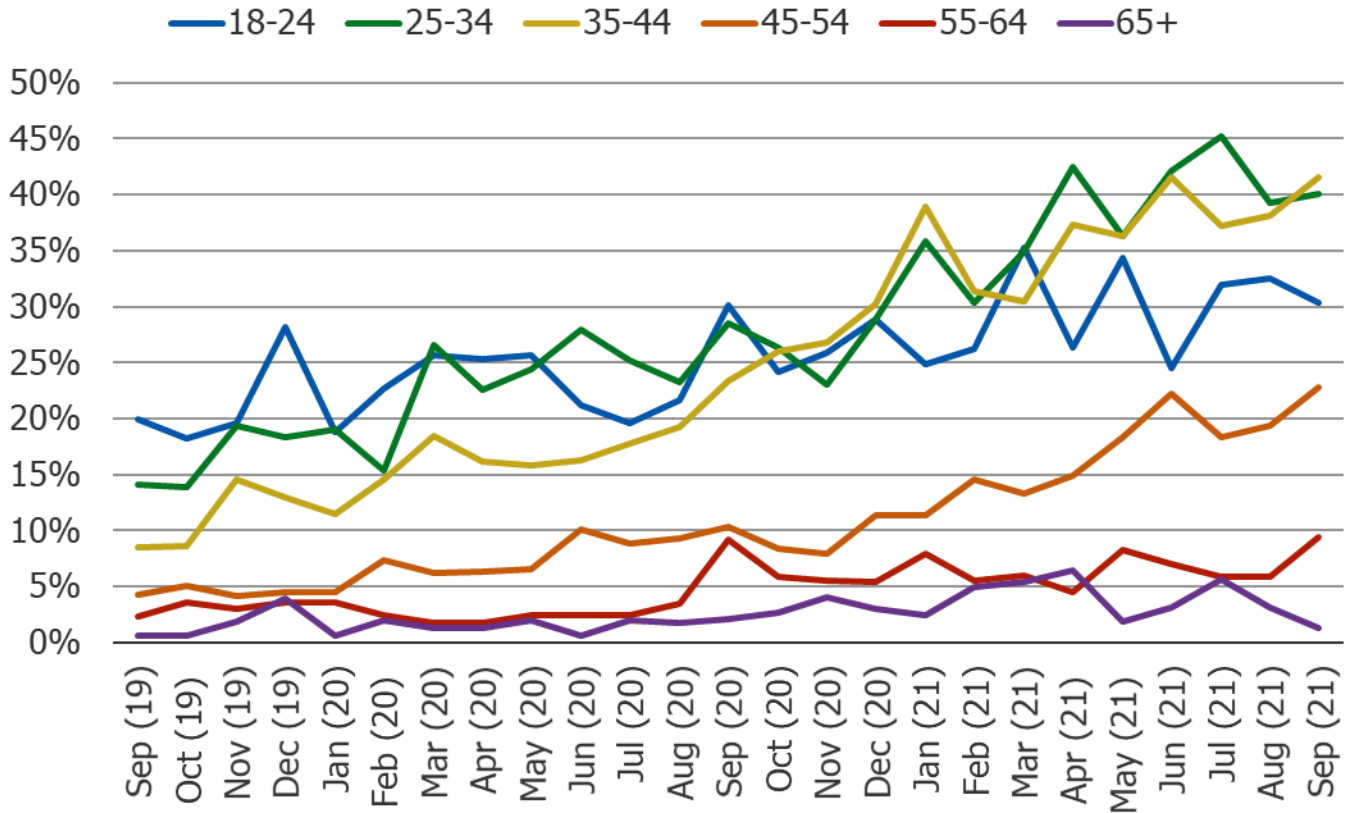
Respondents who are employed and NOT working from home.



Food Delivery Apps

Audience: 1,000 US Consumers
Date: October 2021

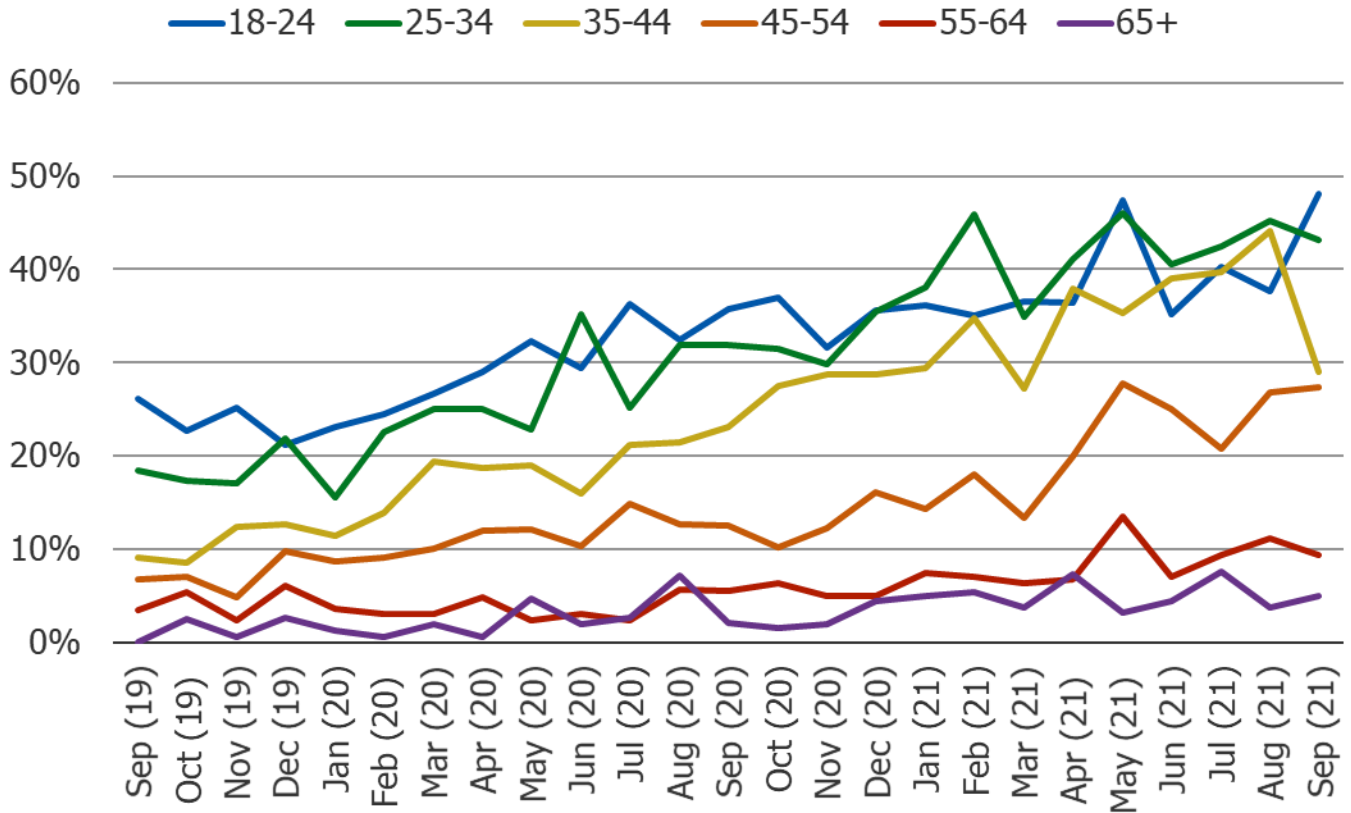
ADOPTION CURVE BY AGE – UBER EATS (REGULARLY OR OCCASIONALLY USES PLATFORM)



Food Delivery Apps

Audience: 1,000 US Consumers
Date: October 2021

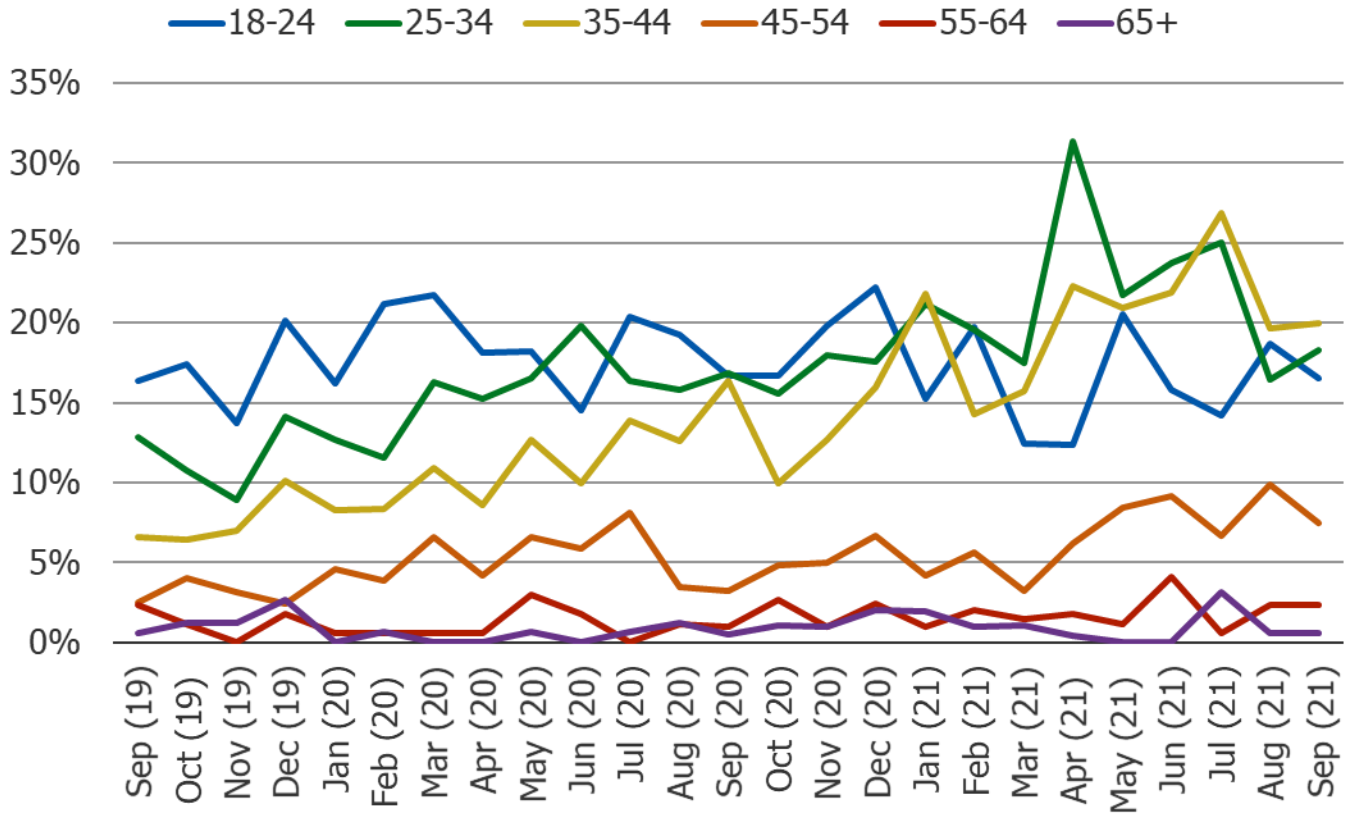
ADOPTION CURVE BY AGE – DOOR DASH (REGULARLY OR OCCASIONALLY USES PLATFORM)



Food Delivery Apps

Audience: 1,000 US Consumers
Date: October 2021

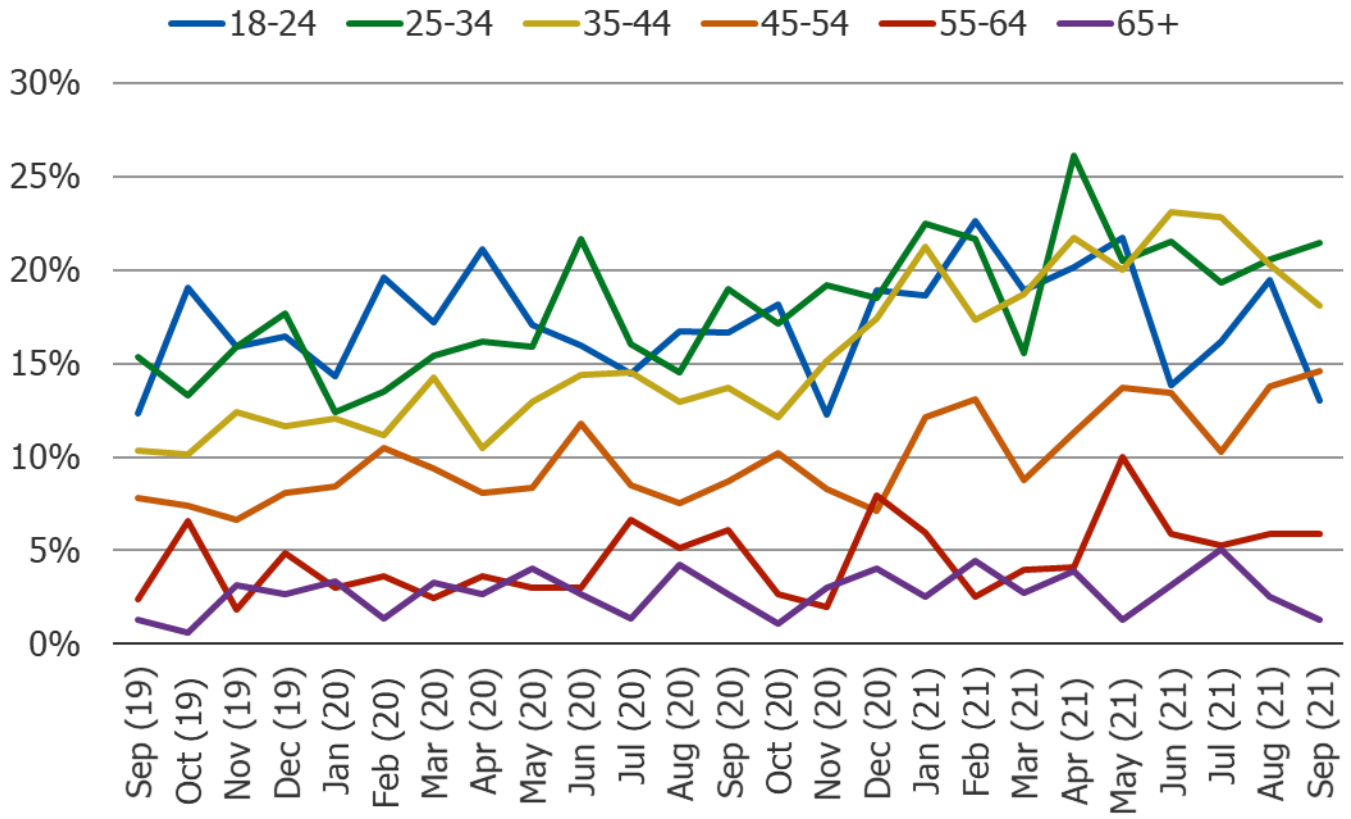
ADOPTION CURVE BY AGE – POSTMATES (REGULARLY OR OCCASIONALLY USES PLATFORM)



Food Delivery Apps

Audience: 1,000 US Consumers
Date: October 2021

ADOPTION CURVE BY AGE – GRUBHUB (REGULARLY OR OCCASIONALLY USES PLATFORM)

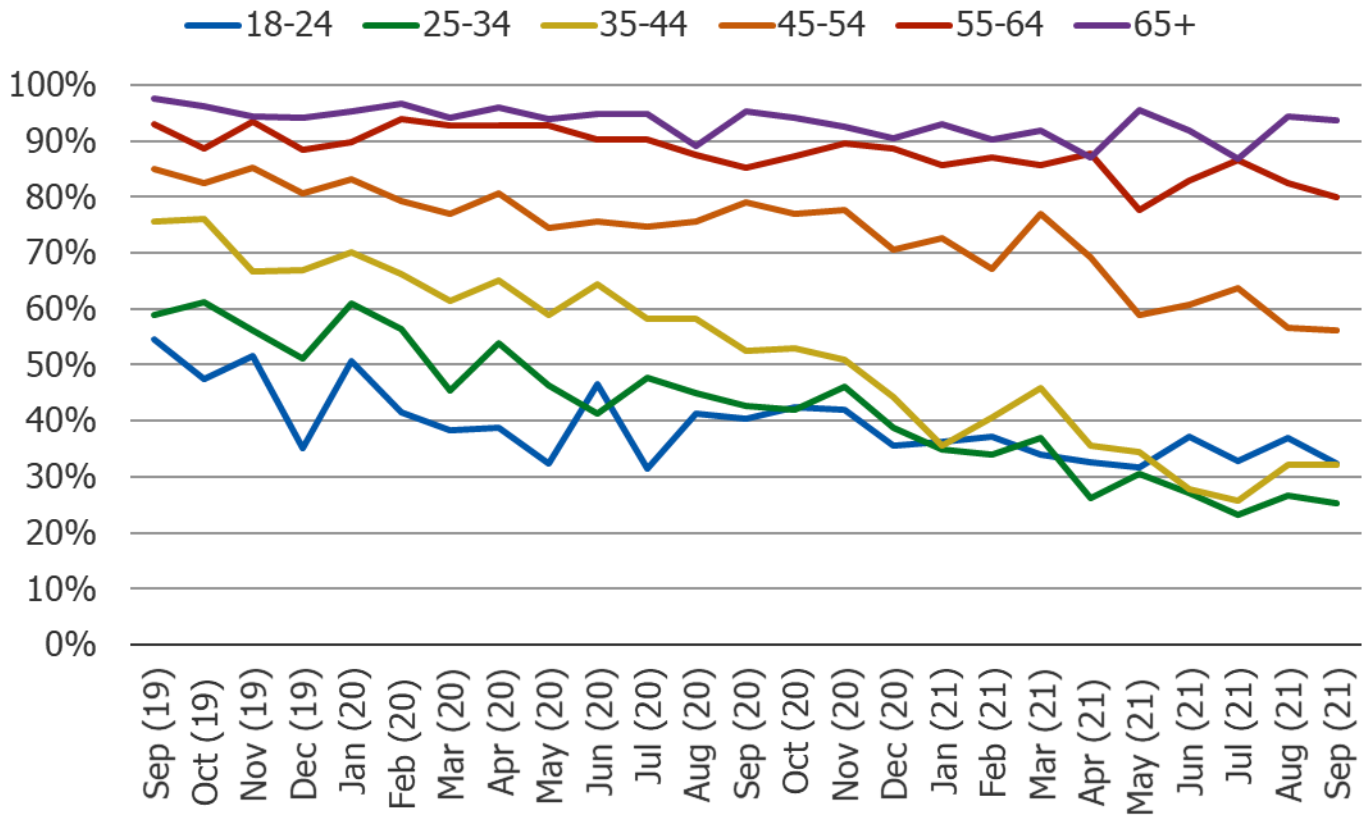


Food Delivery Apps

Audience: 1,000 US Consumers

Date: October 2021

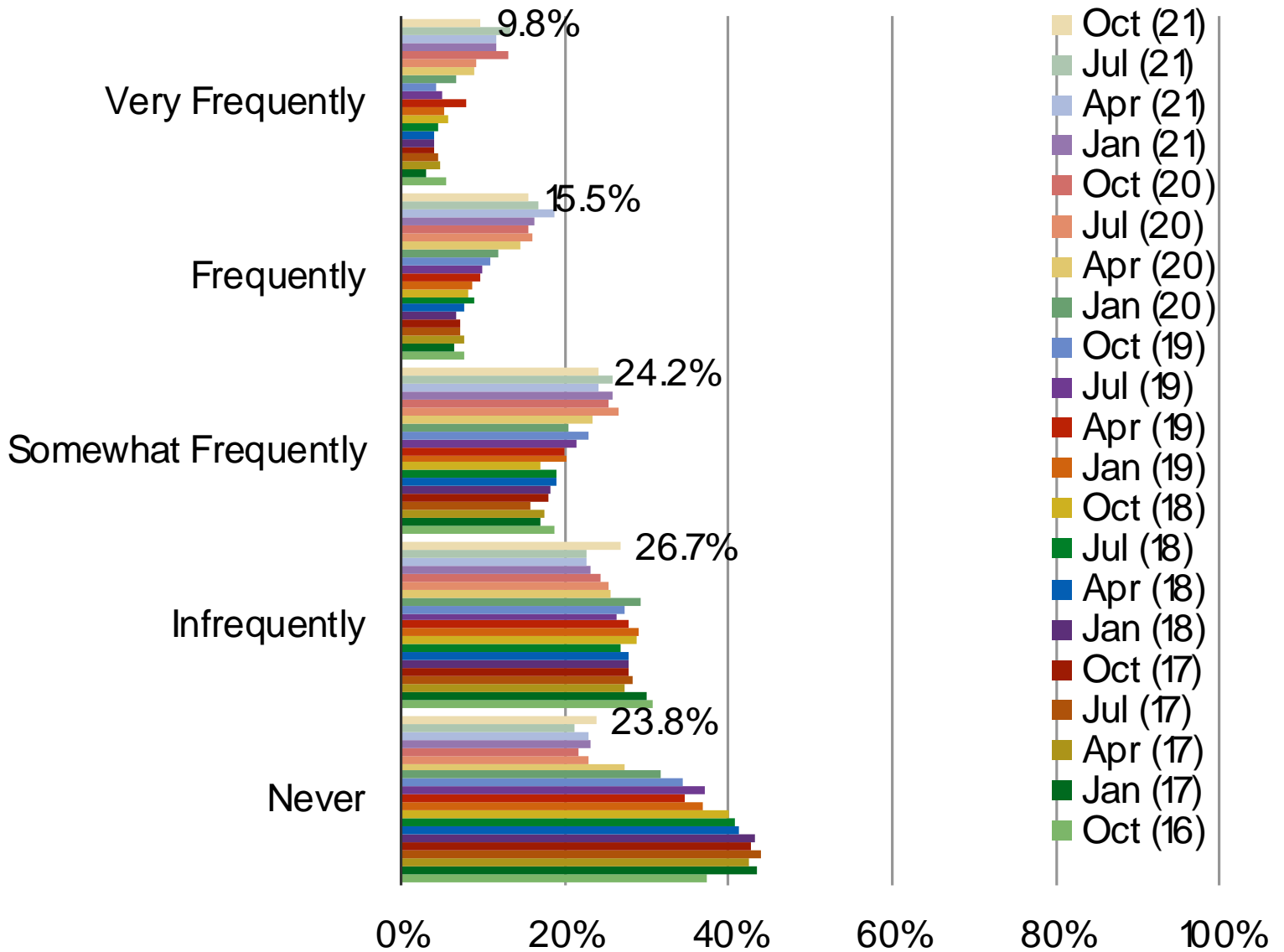
ADOPTION CURVE BY AGE –REGULARLY OR OCCASIONALLY USES NONE OF THE ABOVE PLATFORMS (OPTIONS SHOWN INCLUDE UBER EATS, DOOR DASH, POSTMATES, GRUBHUB, AND SEAMLESS)



USAGE TRENDS AND SENTIMENT READINGS

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

Posed to all respondents.



N = 1508

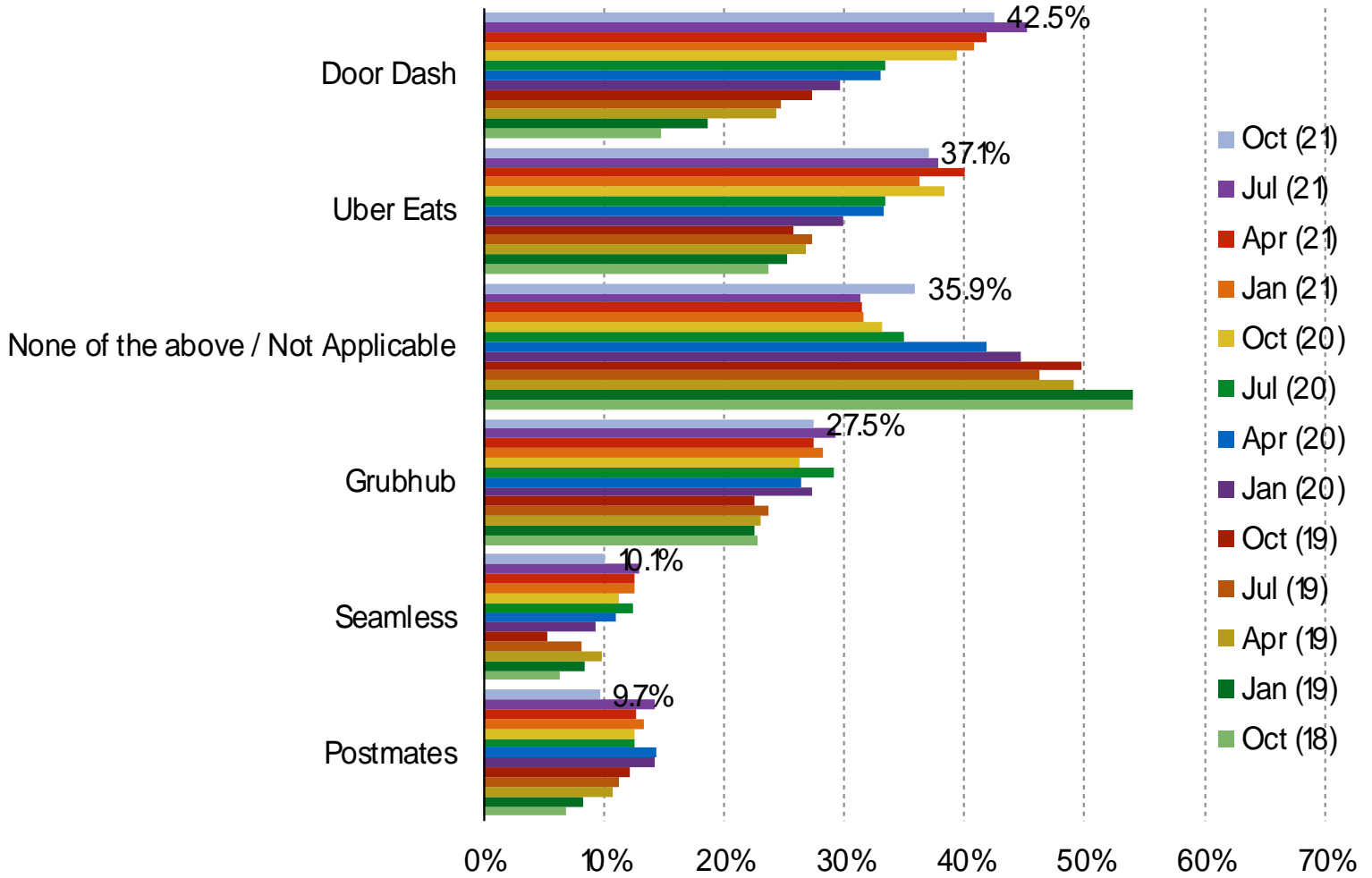
Food Delivery Apps

Audience: 1,000 US Consumers

Date: October 2021

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

Posed to respondents who use food delivery apps.



N = 1149

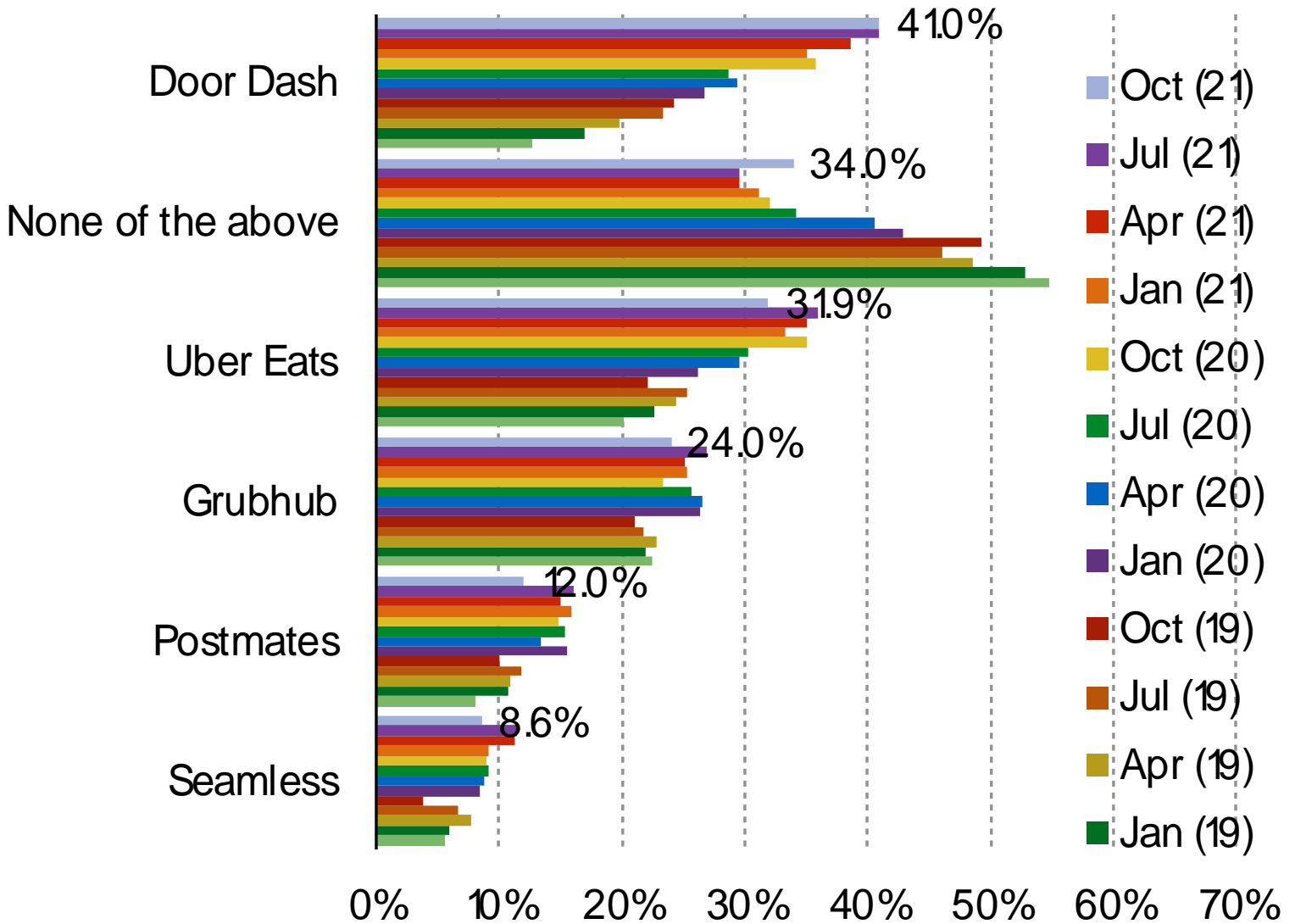
Food Delivery Apps

Audience: 1,000 US Consumers

Date: October 2021

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 = 1149

Food Delivery Apps

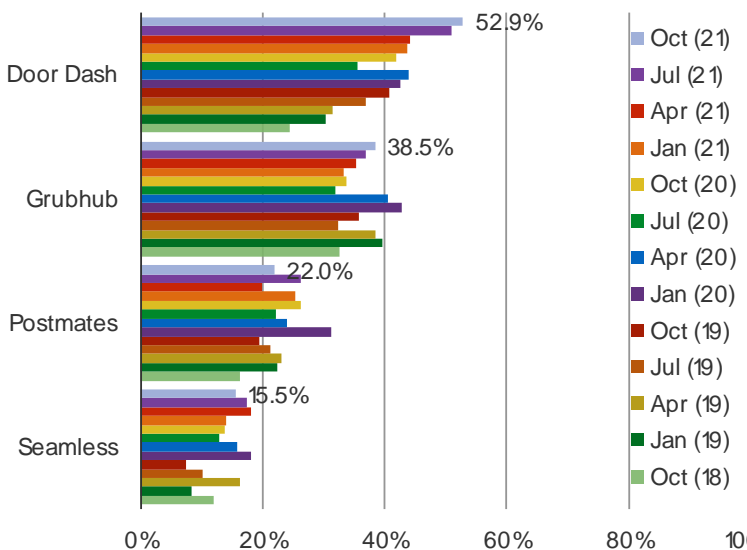
Audience: 1,000 US Consumers

Date: October 2021

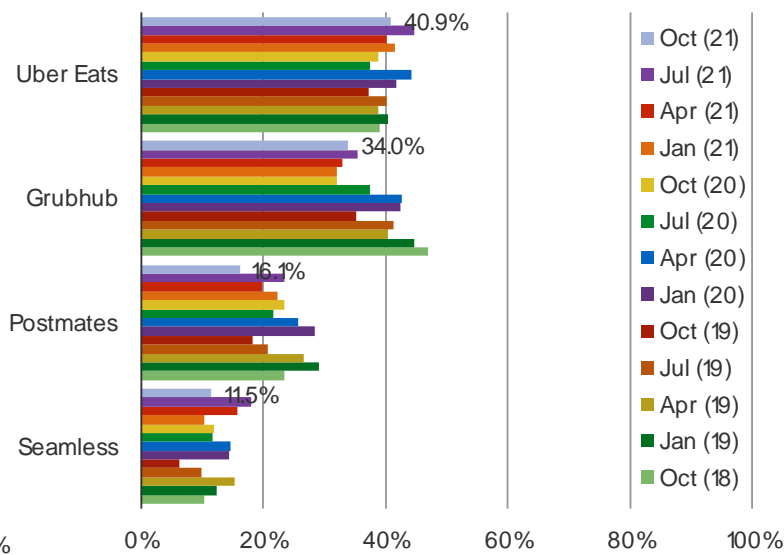
CROSS-OVER: REGULARLY OR OCCASIONALLY USES EACH OF THE FOLLOWING, WHAT OTHER PLATFORMS DO THEY ALSO USE REGULARLY OR OCCASIONALLY?

Posed to respondents who use food delivery apps.

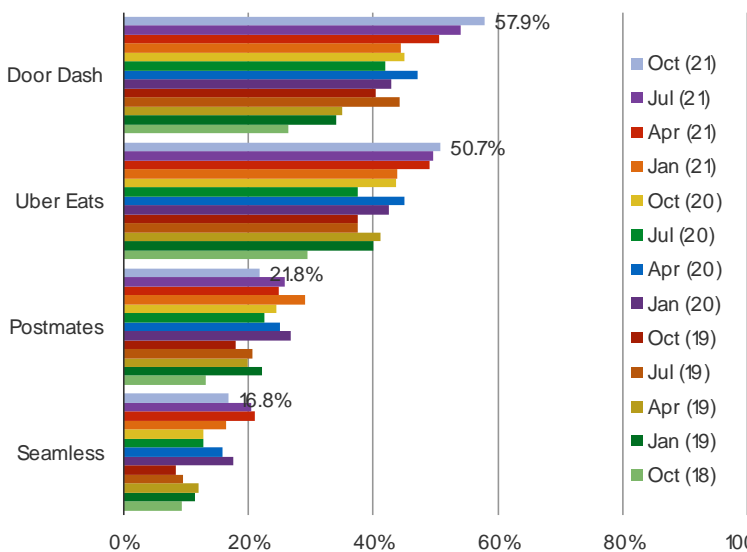
Uber Eats Users Also Use



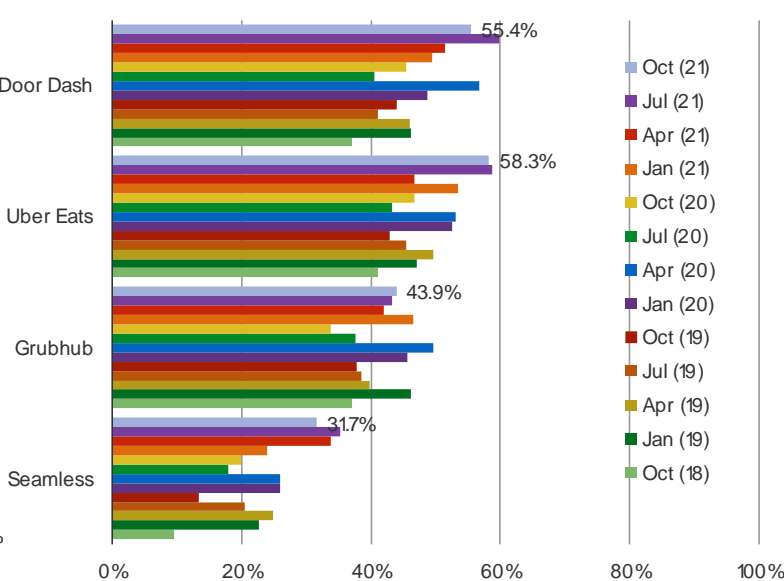
Door Dash Users Also Use



GrubHub Users Also Use



Postmates Users Also Use



| | N= |
|-----------|-----|
| Uber Eats | 367 |
| Door Dash | 471 |
| Seamless | 99 |
| Grubhub | 276 |
| Postmates | 138 |

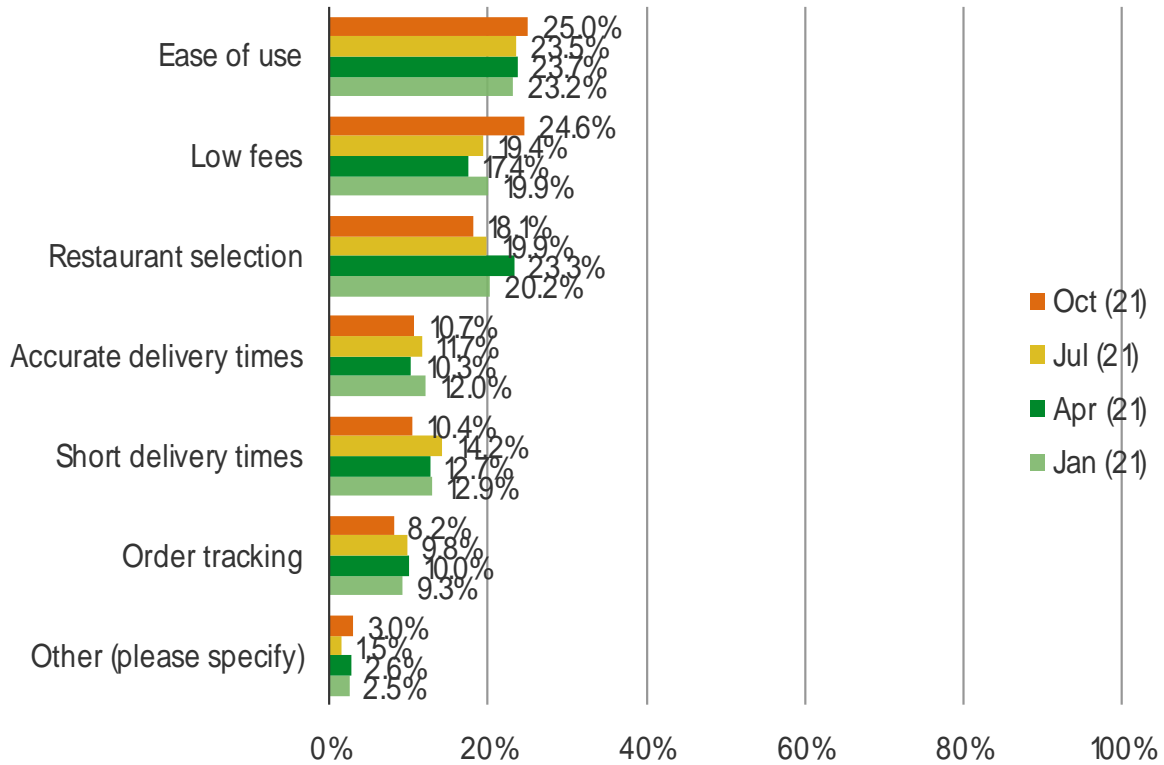
Food Delivery Apps

Audience: 1,000 US Consumers

Date: October 2021

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

Posed to respondents who use food delivery apps.



N = 1150

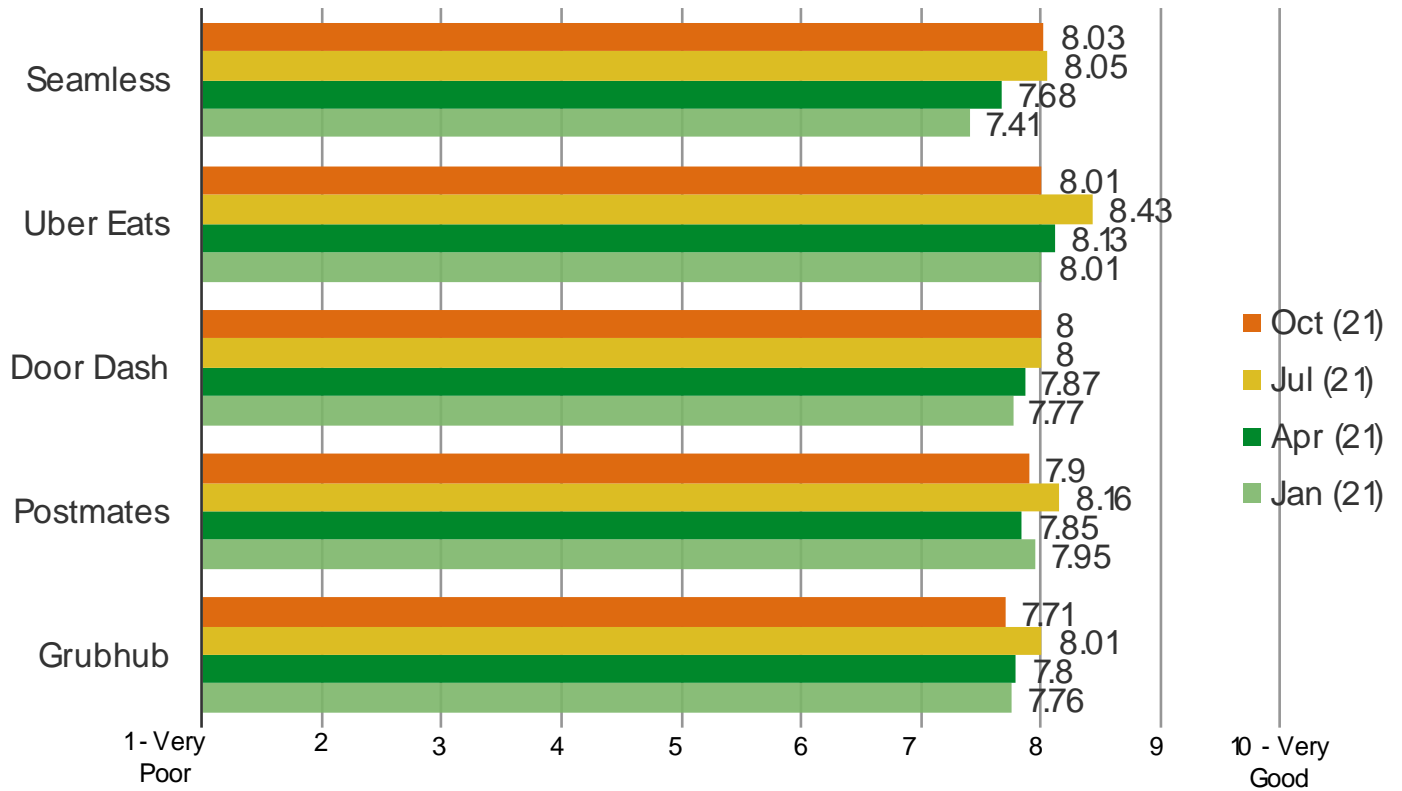
Food Delivery Apps

Audience: 1,000 US Consumers

Date: October 2021

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

Posed to respondents who use each of the following apps.



| | N= |
|-----------|-----|
| Uber Eats | 426 |
| Door Dash | 488 |
| Seamless | 116 |
| Grubhub | 316 |
| Postmates | 111 |

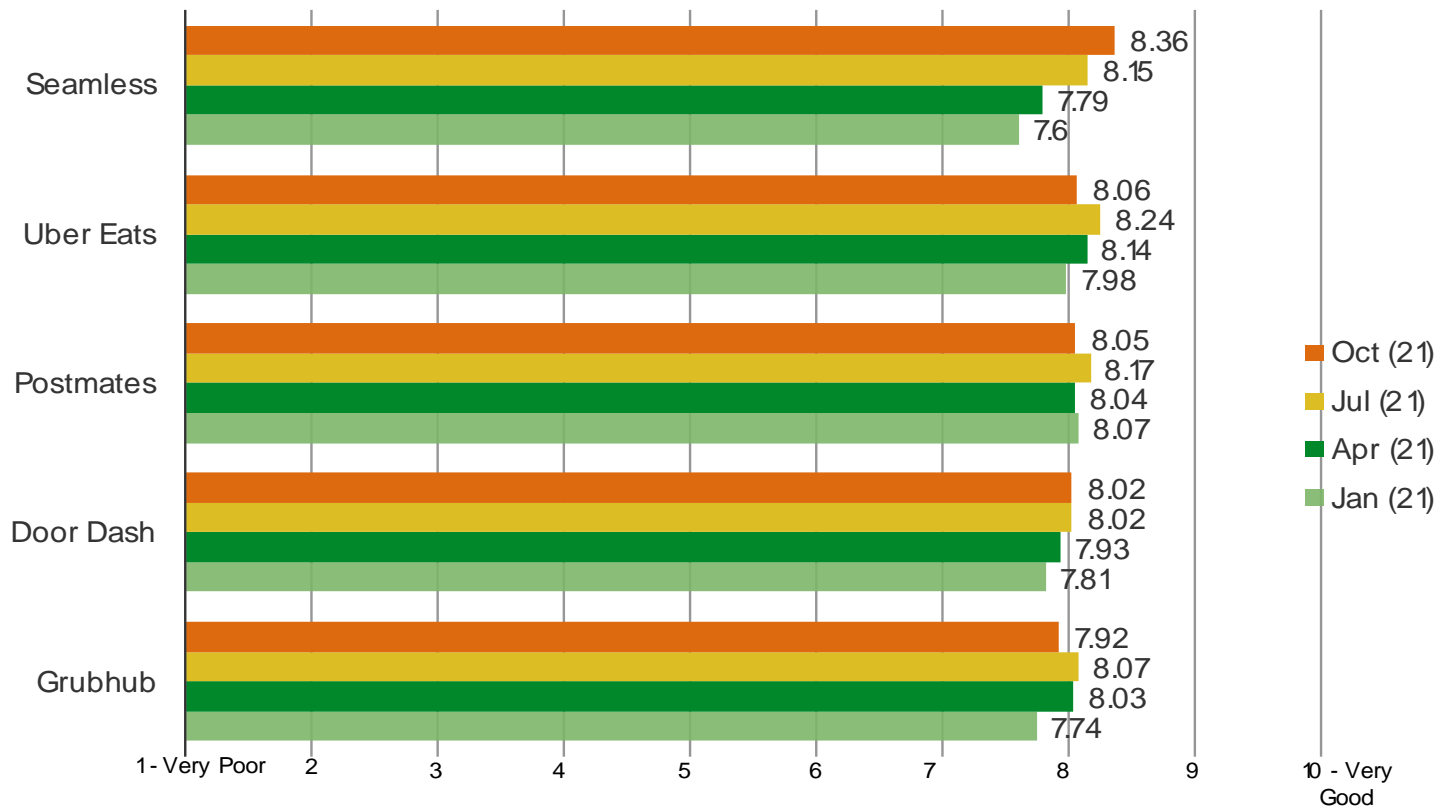
Food Delivery Apps

Audience: 1,000 US Consumers

Date: October 2021

PLEASE RATE THE FOLLOWING WHEN IT COMES TO RESTAURANT SELECTION:

Posed to respondents who use each of the following apps.



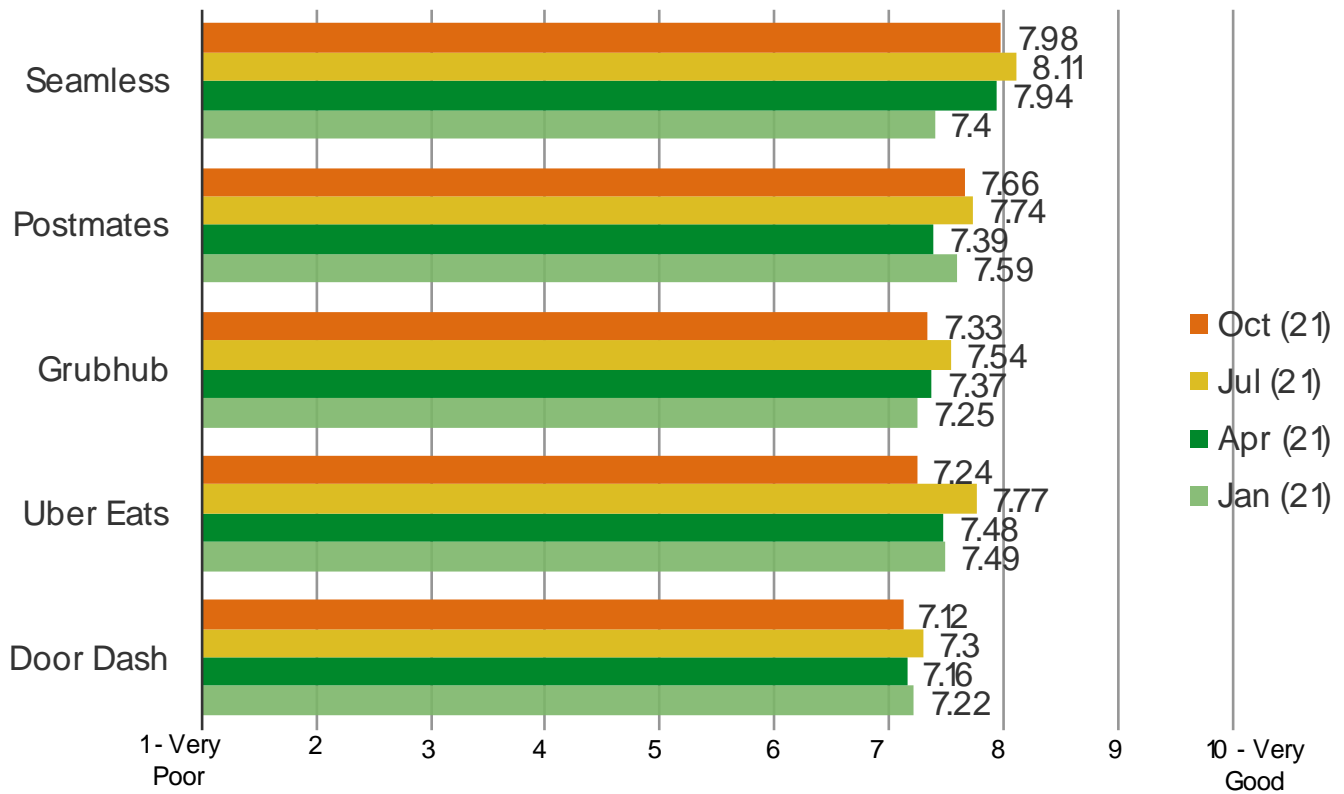
| | N= |
|-----------|-----|
| Uber Eats | 426 |
| Door Dash | 488 |
| Seamless | 116 |
| Grubhub | 316 |
| Postmates | 111 |

Food Delivery Apps

Audience: 1,000 US Consumers
Date: October 2021

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

Posed to respondents who use each of the following apps.



| | N= |
|-----------|-----|
| Uber Eats | 426 |
| Door Dash | 488 |
| Seamless | 116 |
| Grubhub | 316 |
| Postmates | 111 |

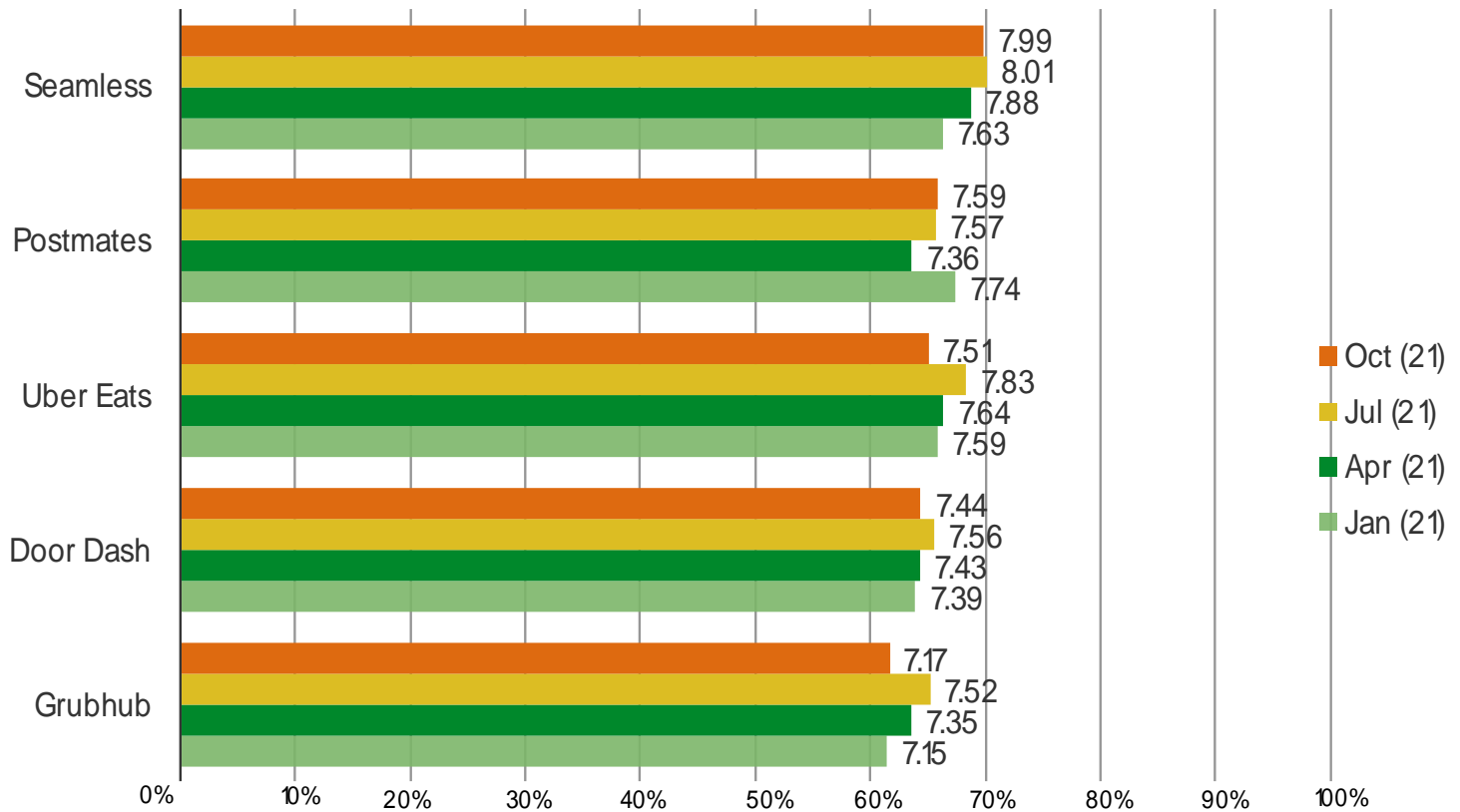
Food Delivery Apps

Audience: 1,000 US Consumers

Date: October 2021

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

Posed to respondents who use each of the following apps.



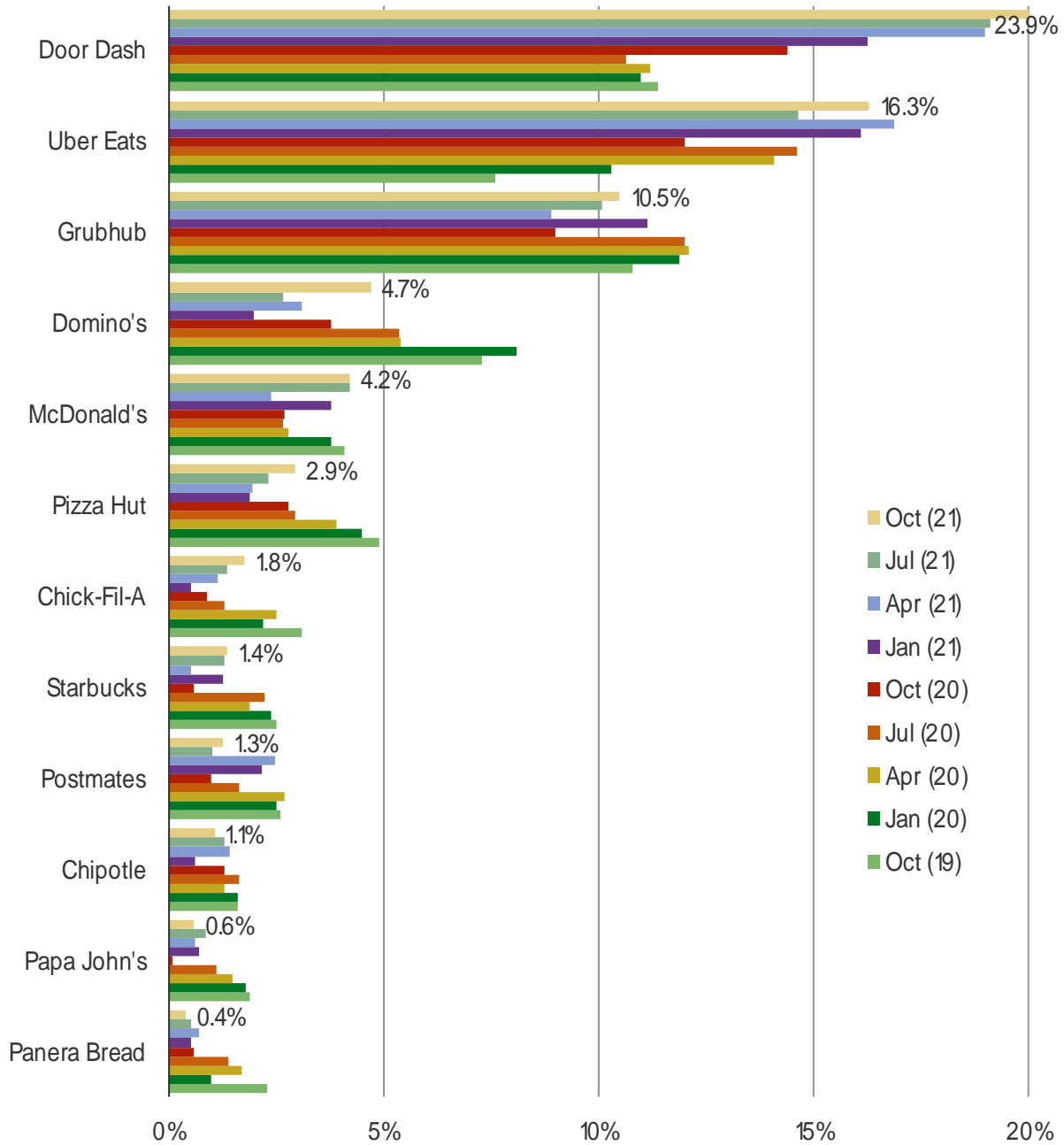
| | N= |
|-----------|-----|
| Uber Eats | 426 |
| Door Dash | 488 |
| Seamless | 116 |
| Grubhub | 316 |
| Postmates | 111 |

Food Delivery Apps

Audience: 1,000 US Consumers
Date: October 2021

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

Posed to respondents who use food delivery apps.



N = 1149

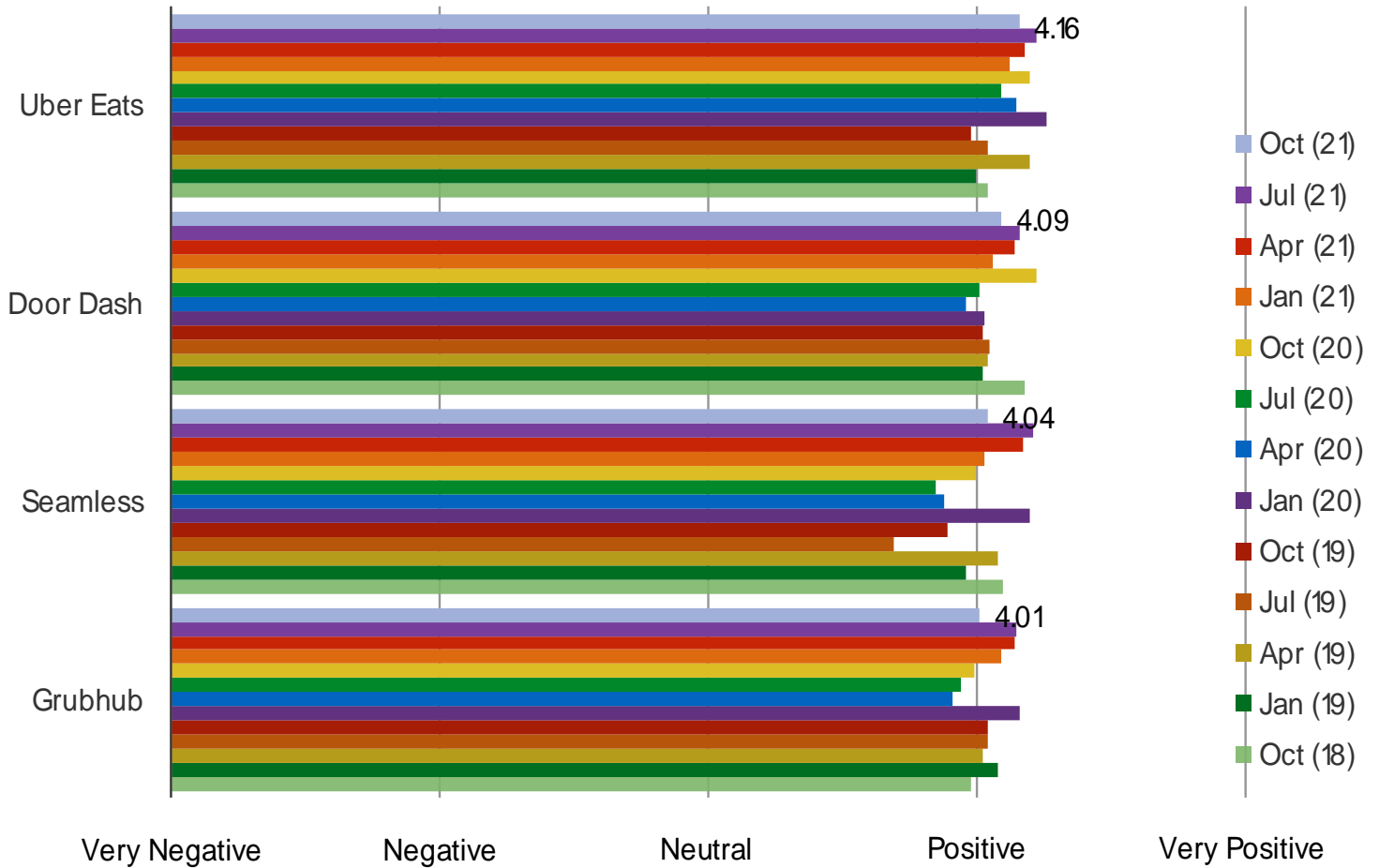
Food Delivery Apps

Audience: 1,000 US Consumers

Date: October 2021

WHAT IS YOUR OPINION OF THE PLATFORM?

Posed to respondents who use food delivery apps.



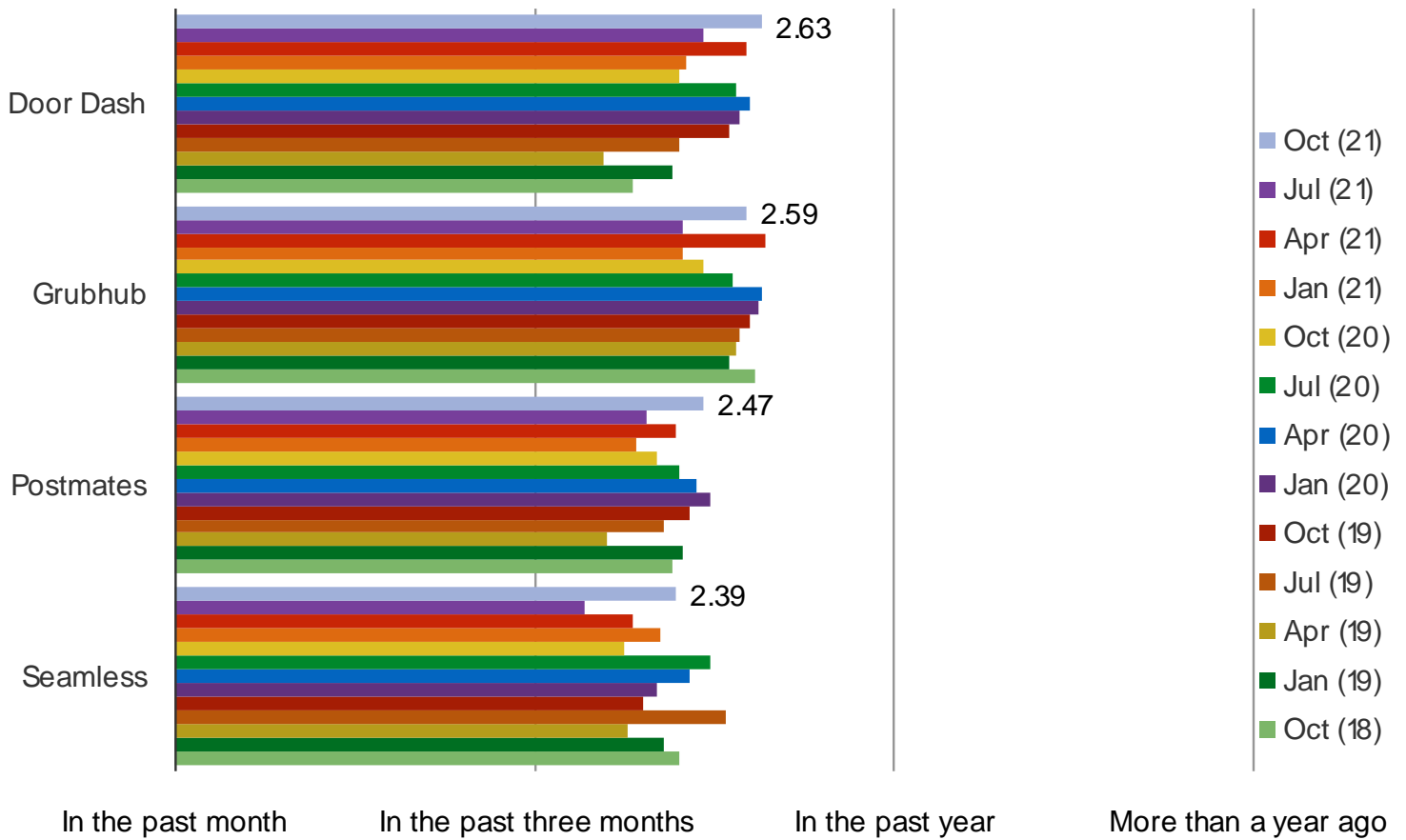
| | N= |
|-----------|-----|
| Uber Eats | 426 |
| Door Dash | 488 |
| Seamless | 116 |
| Grubhub | 316 |
| Postmates | 111 |

Food Delivery Apps

Audience: 1,000 US Consumers
Date: October 2021

WHEN DID YOU FIRST START USING THIS PLATFORM?

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



| | N= |
|-----------|-----|
| Uber Eats | 426 |
| Door Dash | 488 |
| Seamless | 116 |
| Grubhub | 316 |
| Postmates | 111 |

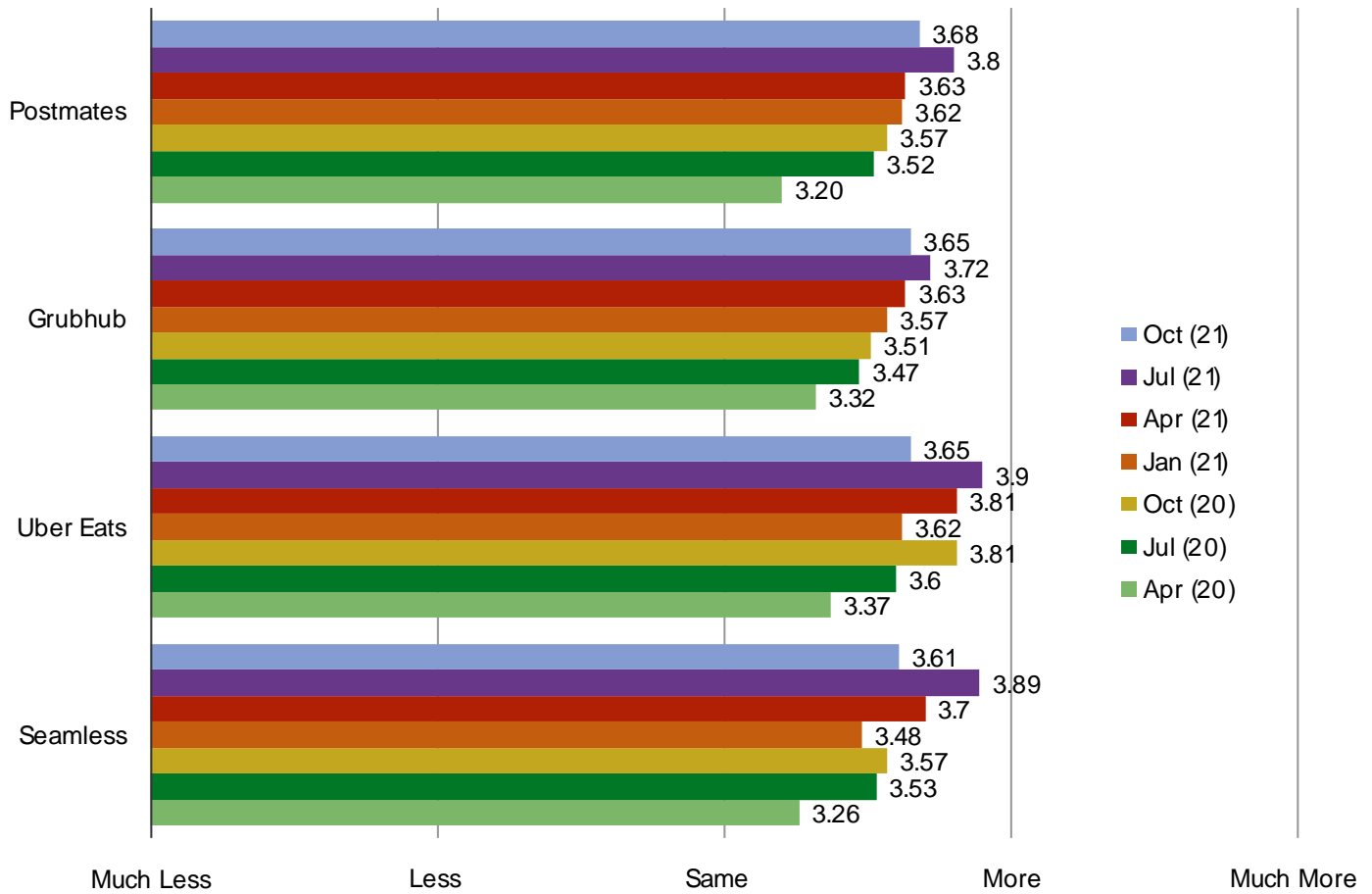
Food Delivery Apps

Audience: 1,000 US Consumers

Date: October 2021

HAS CORONAVIRUS AND/OR STAY-AT-HOME ORDERS CAUSED YOU TO USE THE FOLLOWING MORE OR LESS OFTEN THAN NORMAL?

Posed to respondents who have each of the following downloaded on their phone.



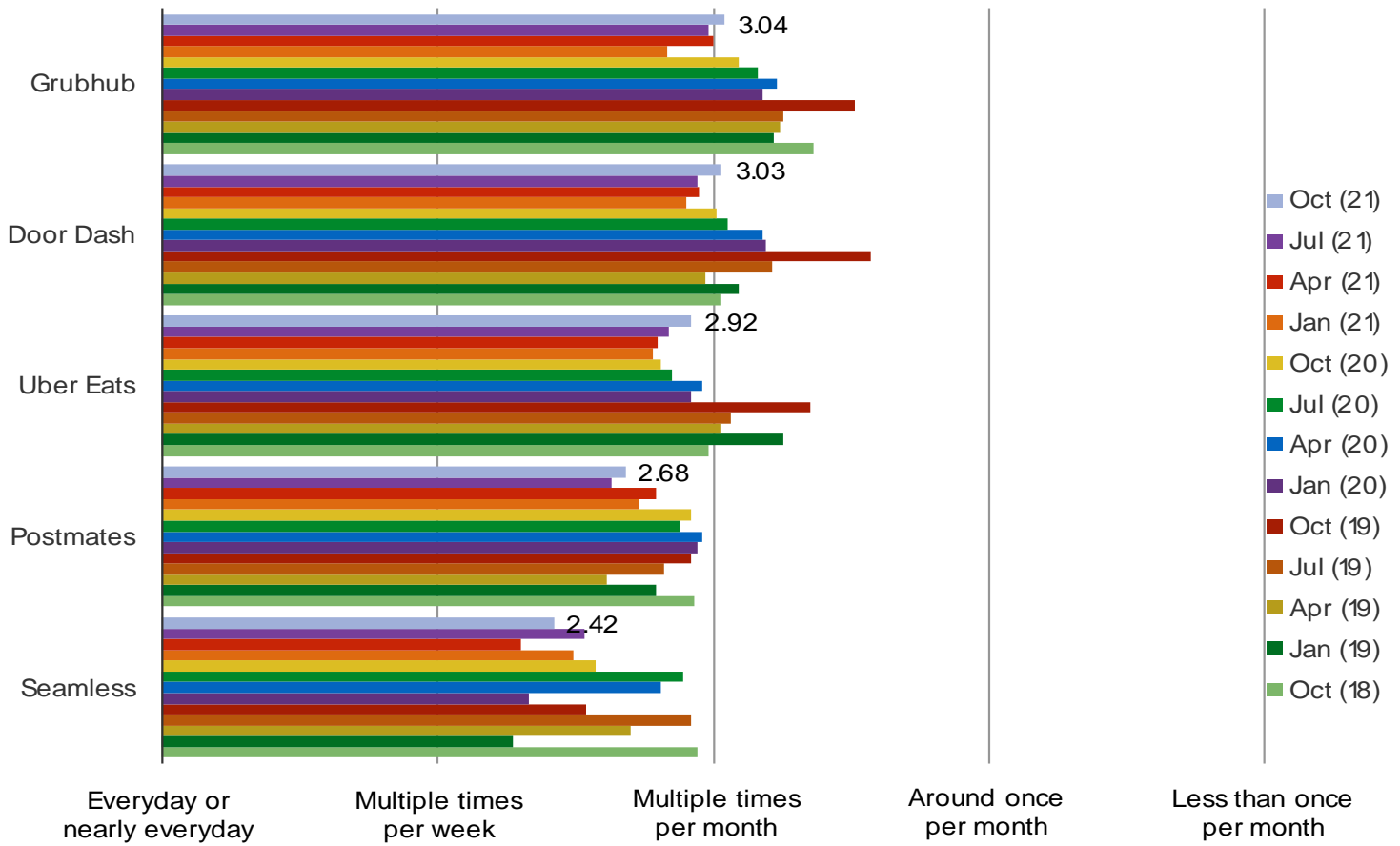
| | N= |
|-----------|-----|
| Uber Eats | 426 |
| Door Dash | 488 |
| Seamless | 116 |
| Grubhub | 316 |
| Postmates | 111 |

Food Delivery Apps

Audience: 1,000 US Consumers
Date: October 2021

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 | 426 |
| Door Dash | 488 |
| Seamless | 116 |
| Grubhub | 316 |
| Postmates | 111 |

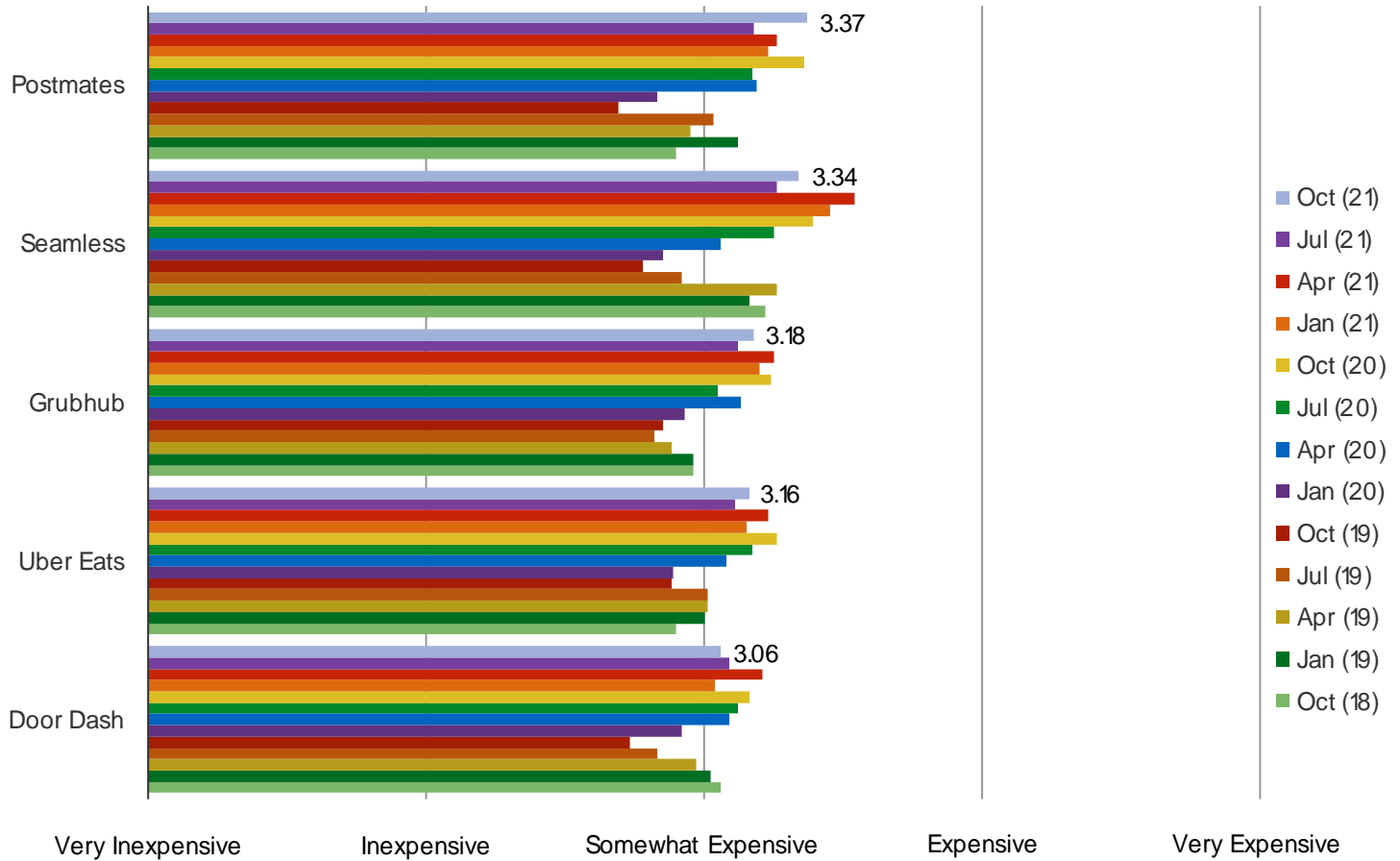
Food Delivery Apps

Audience: 1,000 US Consumers

Date: October 2021

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 | 426 |
| Door Dash | 488 |
| Seamless | 116 |
| Grubhub | 316 |
| Postmates | 111 |

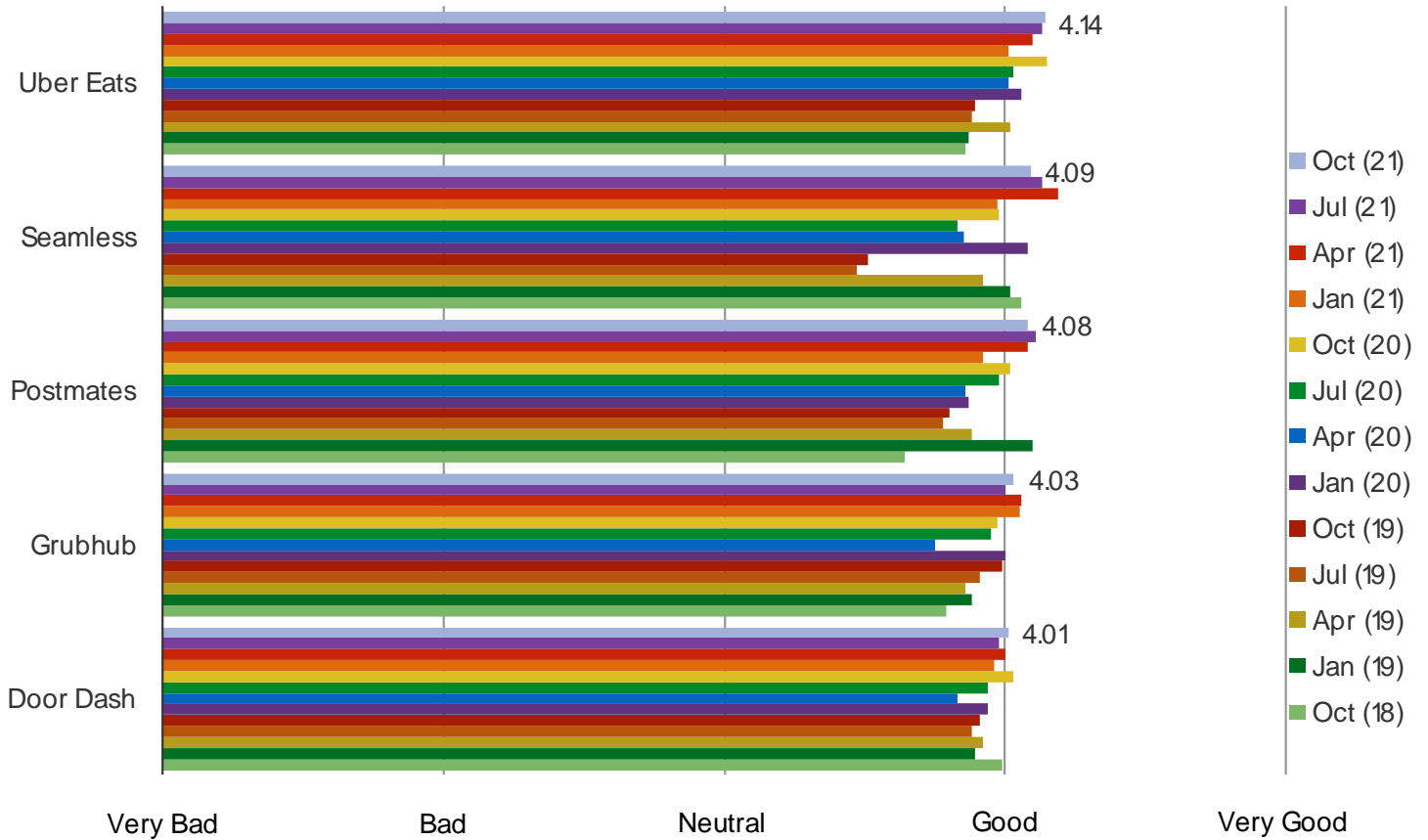
Food Delivery Apps

Audience: 1,000 US Consumers

Date: October 2021

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 | 426 |
| Door Dash | 488 |
| Seamless | 116 |
| Grubhub | 316 |
| Postmates | 111 |

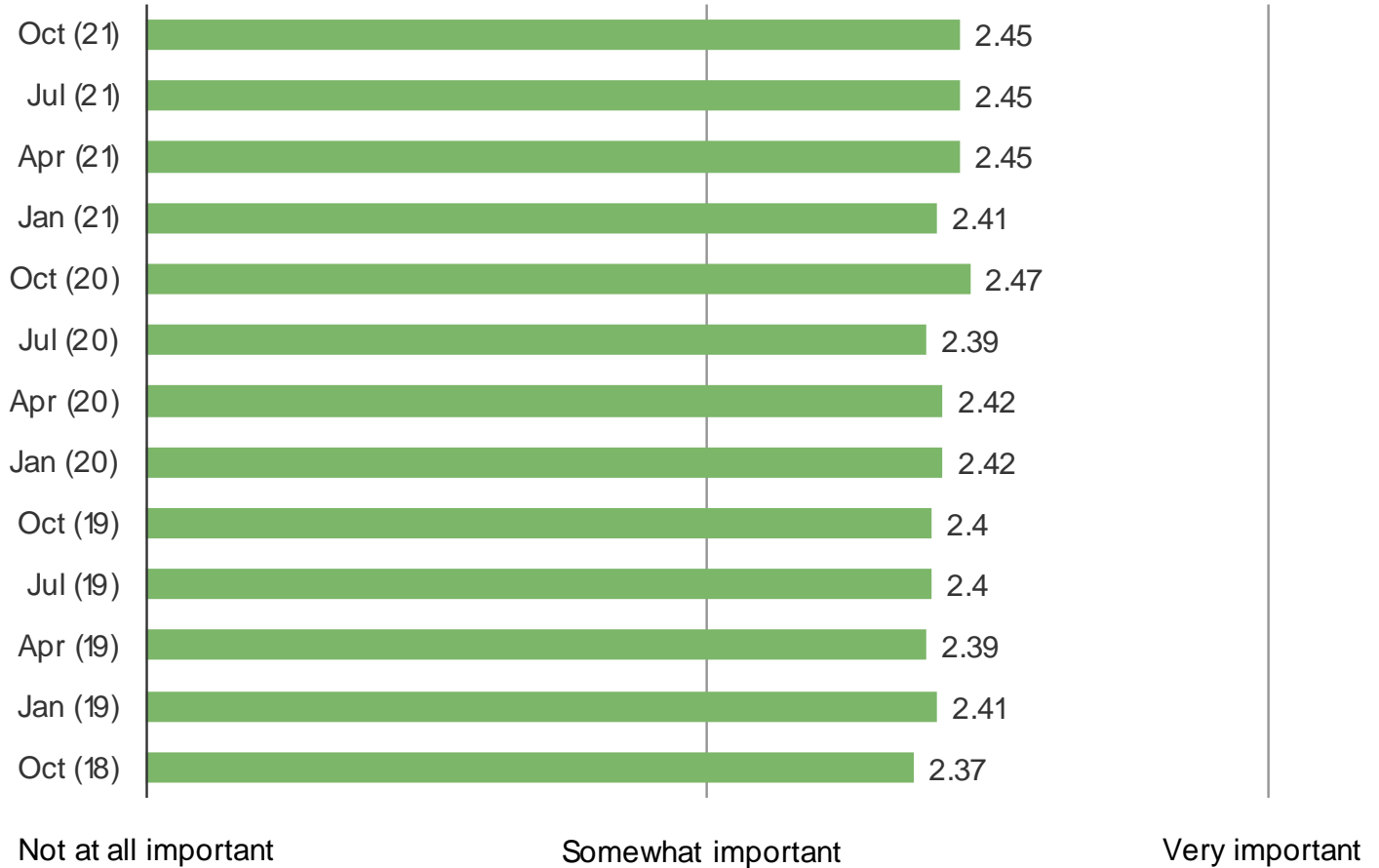
Food Delivery Apps

Audience: 1,000 US Consumers

Date: October 2021

WHEN USING FOOD DELIVERY APPS, HOW IMPORTANT DO YOU THINK IT IS TO BE ABLE TO TRACK THE DRIVER ON A MAP ONCE THEY PICK UP YOUR FOOD?

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



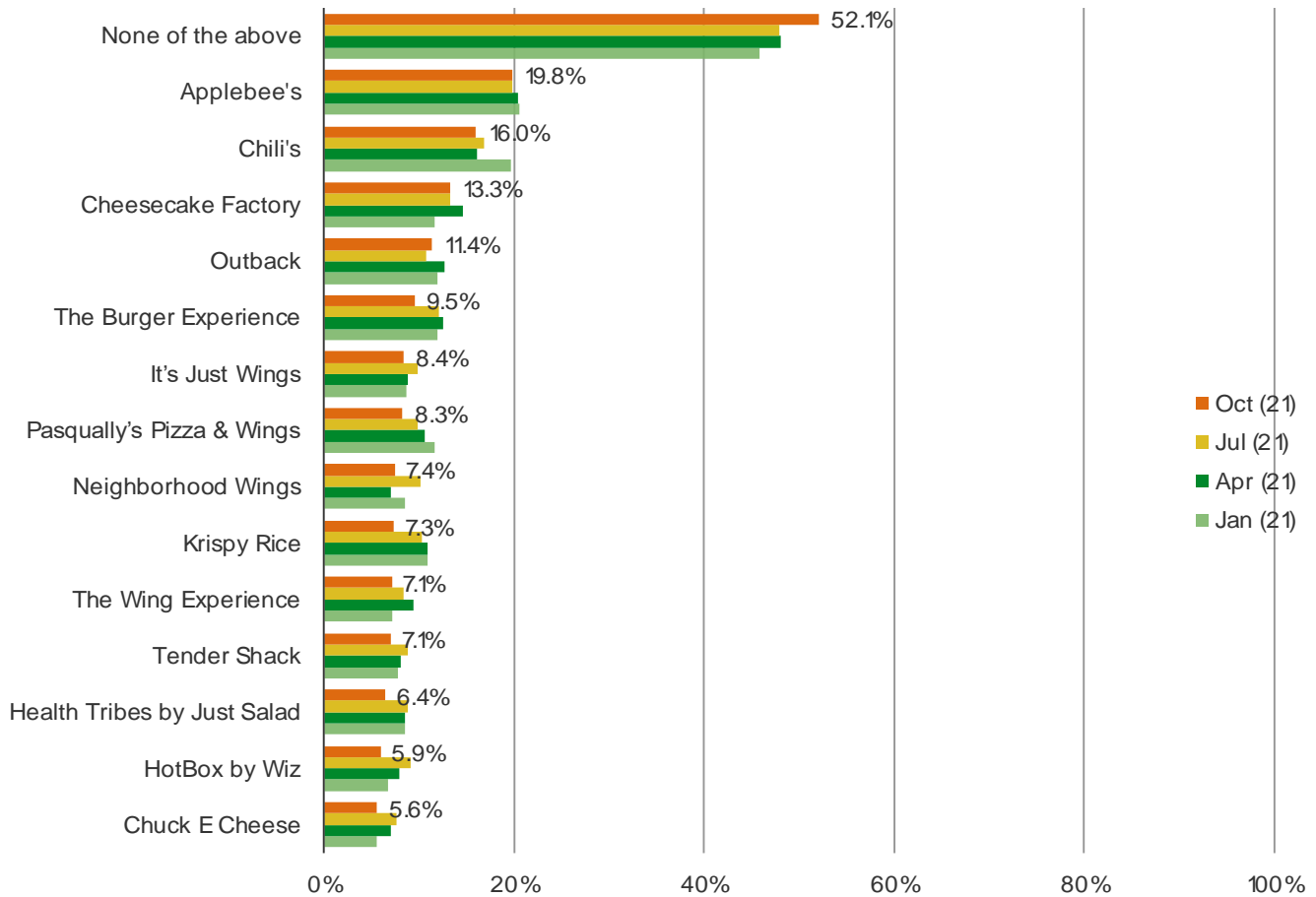
GHOST KITCHENS

Food Delivery Apps

Audience: 1,000 US Consumers
Date: October 2021

HAVE YOU ORDERED FROM ANY OF THE FOLLOWING ON FOOD DELIVERY APPS THAT YOU USE? (PLEASE READ THE CHOICES CAREFULLY AND SELECT ALL THAT APPLY)

Posed to respondents who use food delivery apps.



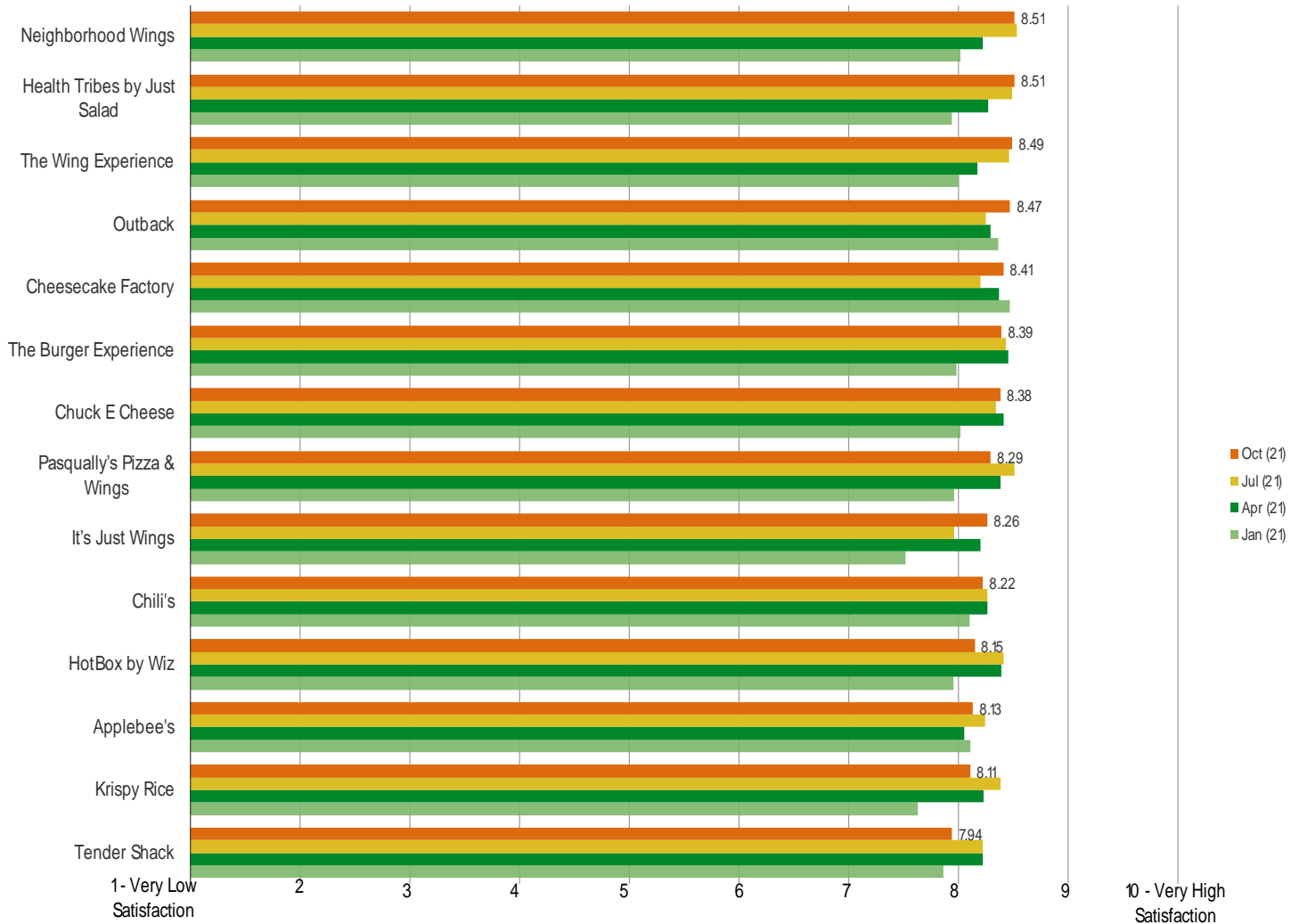
Food Delivery Apps

Audience: 1,000 US Consumers

Date: October 2021

HOW SATISFIED WERE YOU WITH YOUR MOST RECENT ORDER FROM THE FOLLOWING:

Posed to respondents who have ordered from each of the following.

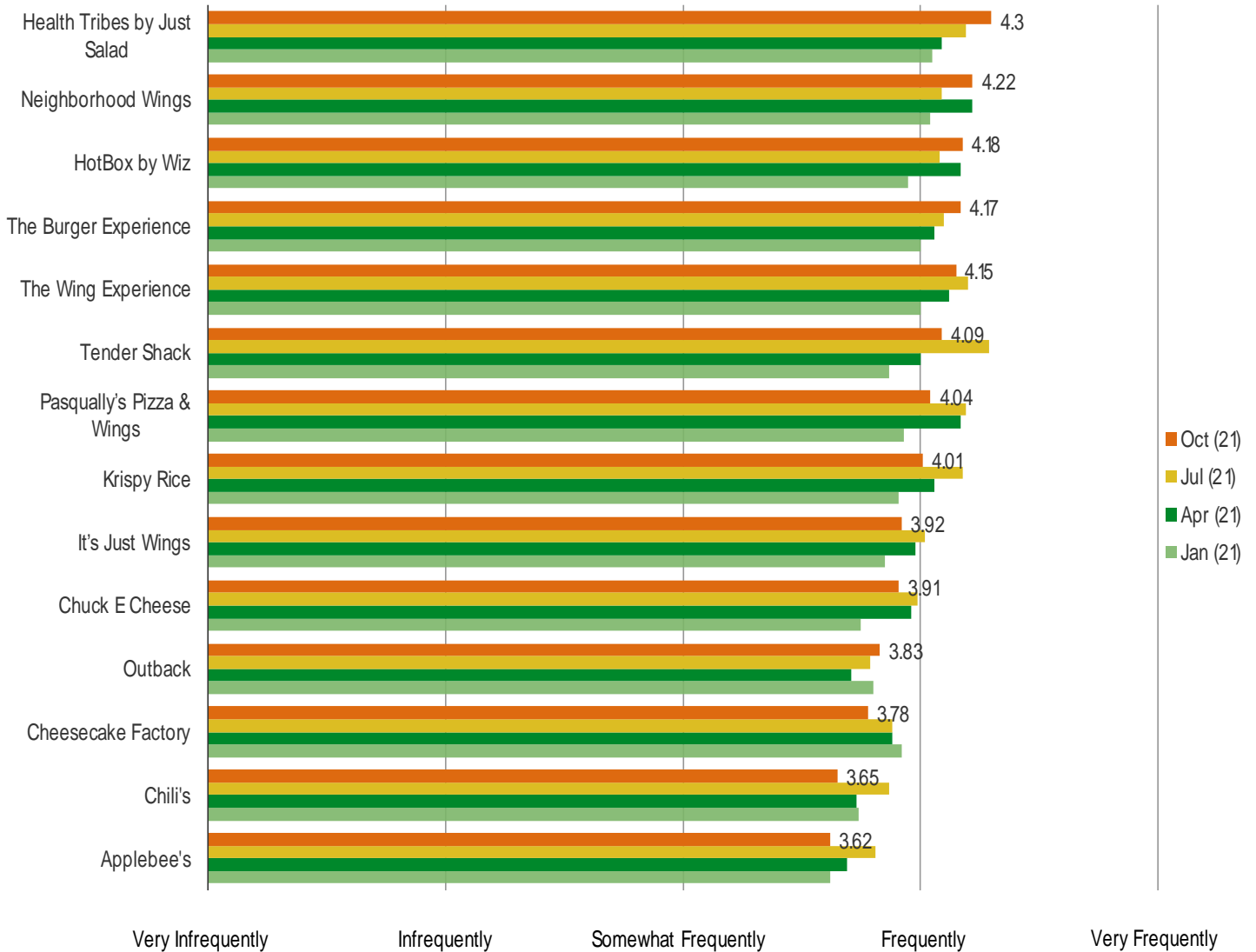


Food Delivery Apps

Audience: 1,000 US Consumers
Date: October 2021

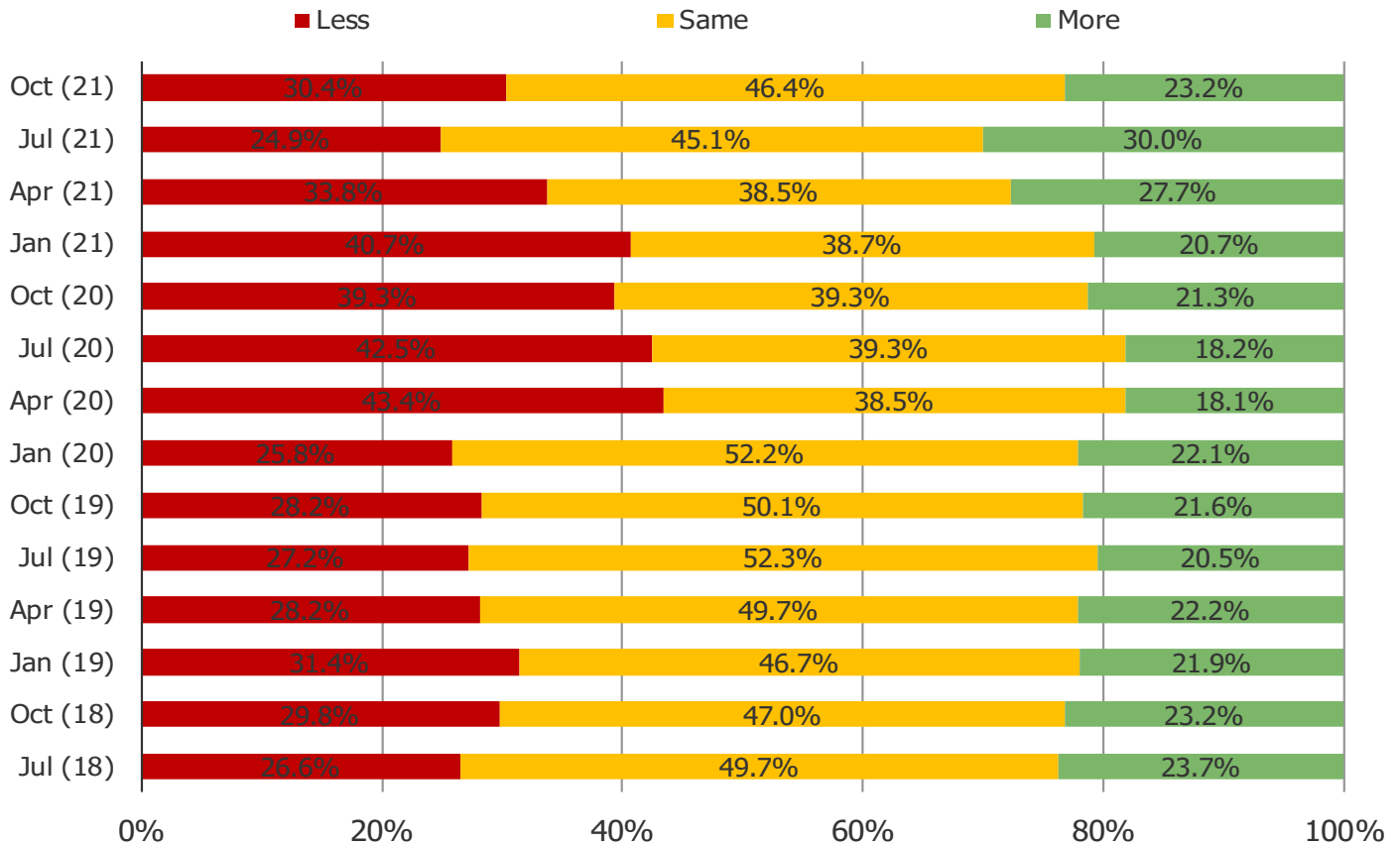
HOW OFTEN DO YOU EXPECT TO ORDER AGAIN FROM THE FOLLOWING GOING FORWARD?

Posed to respondents who have ordered from each of the following.



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

Posed to all respondents.



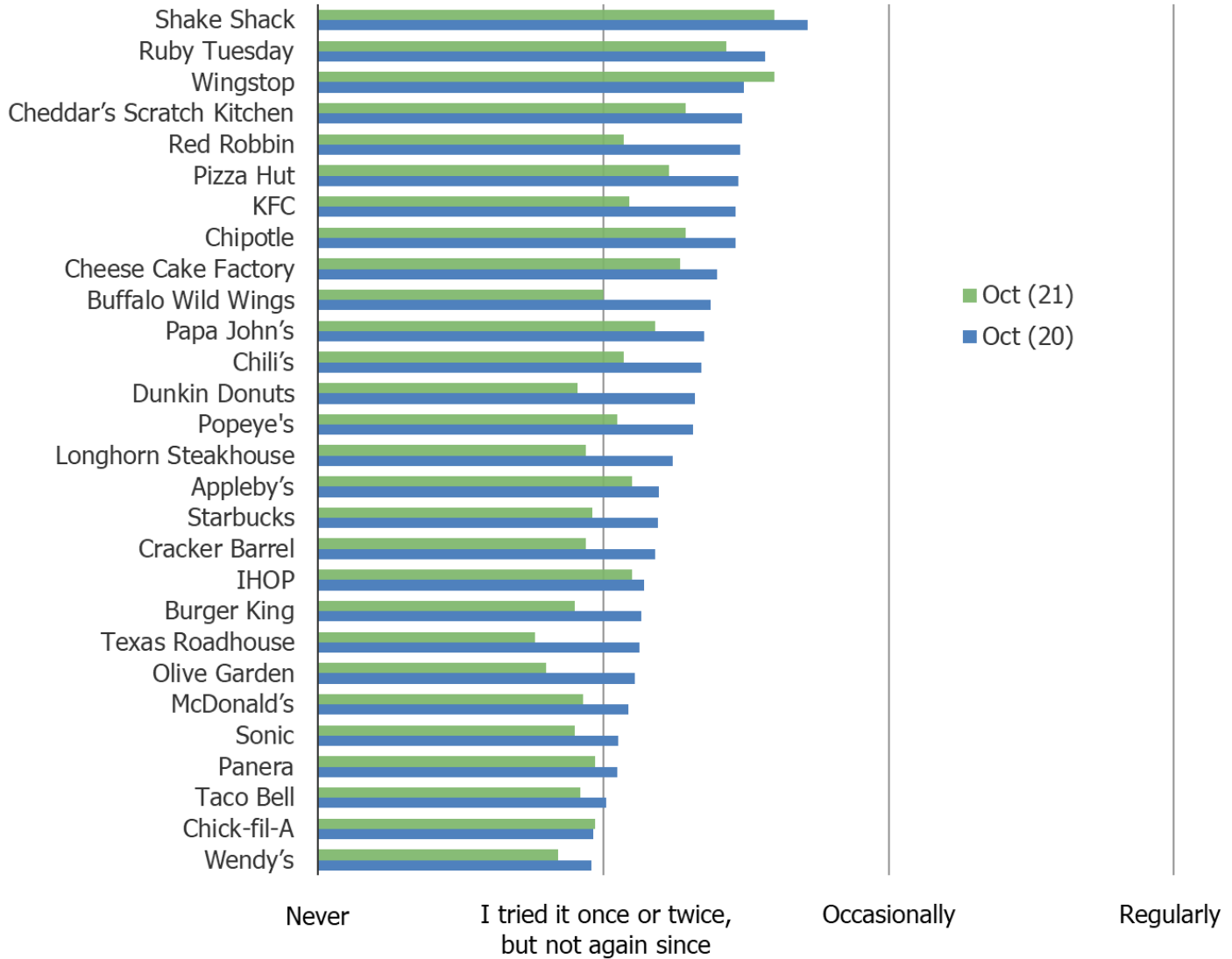
Food Delivery Apps

Audience: 1,000 US Consumers

Date: October 2021

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.



CASUAL DINING OVERALL AND CHICKEN SANDWICHES

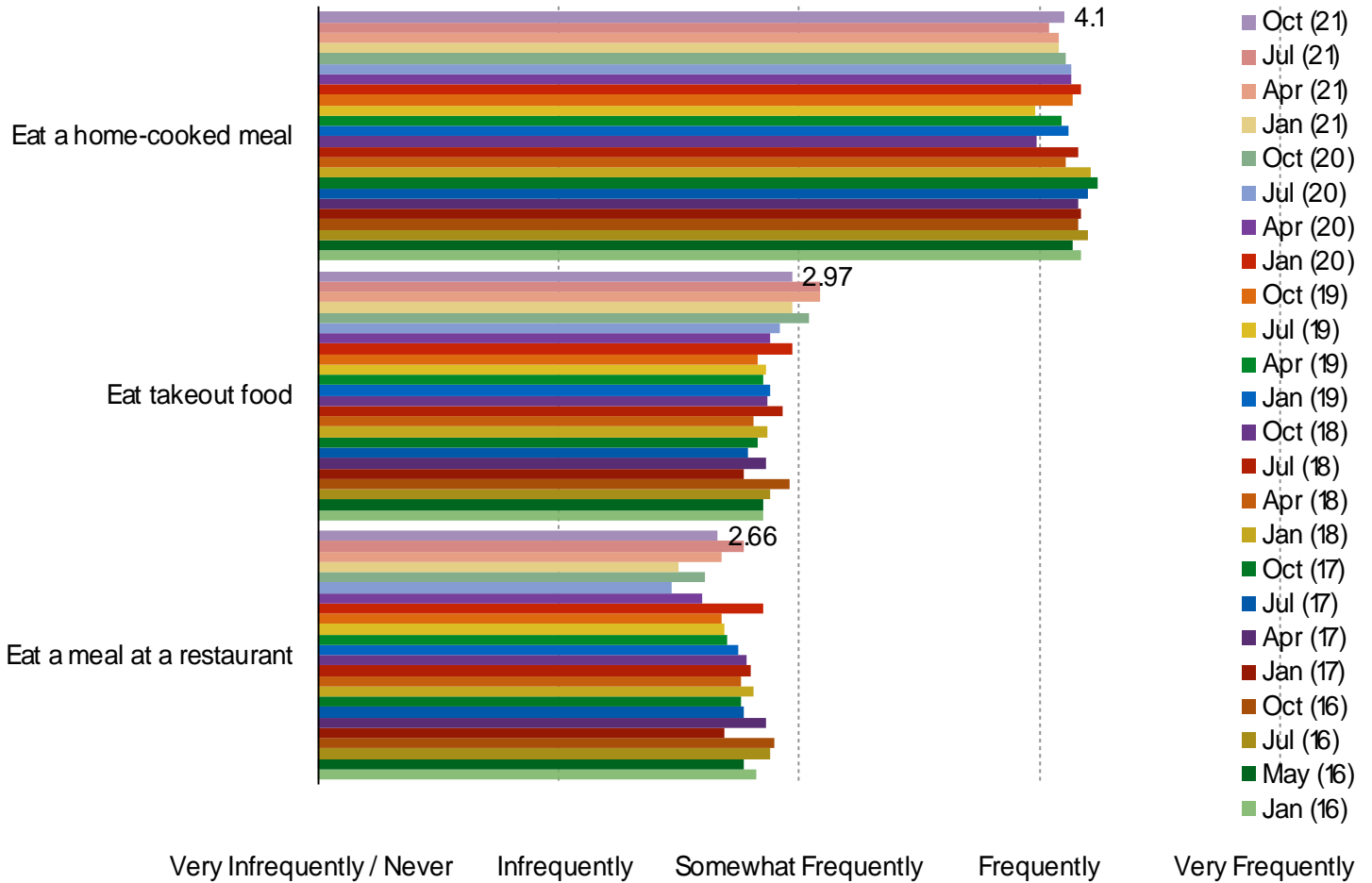
Food Delivery Apps

Audience: 1,000 US Consumers

Date: October 2021

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.

