



BACKGROUND

- ❑ We surveyed 175 Restaurant Owners and General Managers to get feedback about their usage of third party food delivery apps.

FINDINGS:

- ❑ **Respondents firmly believe third party food delivery apps will continue to gain share of purchases over time.**
- ❑ **Restaurants figure to be very sticky on all platforms tested (stickier on DoorDash and Uber Eats compared to Grubhub and Postmates).**
- ❑ **Restaurants believe the apps drive sales growth and profit growth (albeit, to a lesser extent than sales growth).**
- ❑ **Respondents agree that third party apps drive increases in frequency of use, in basket size, and first-time users.**
- ❑ **The vast majority of respondents feel that their most loyal customers order through the restaurant directly.**
- ❑ **DoorDash is generally viewed the most favorably by restaurant owners and in most cases tested more favorably than Uber Eats.**
- ❑ **The importance of all platforms to restaurants became net-more important because of coronavirus and social distancing (DoorDash is enjoying the most tailwind).**
- ❑ **Restaurants are fairly sensitive toward potential increases in fees/take rates.**



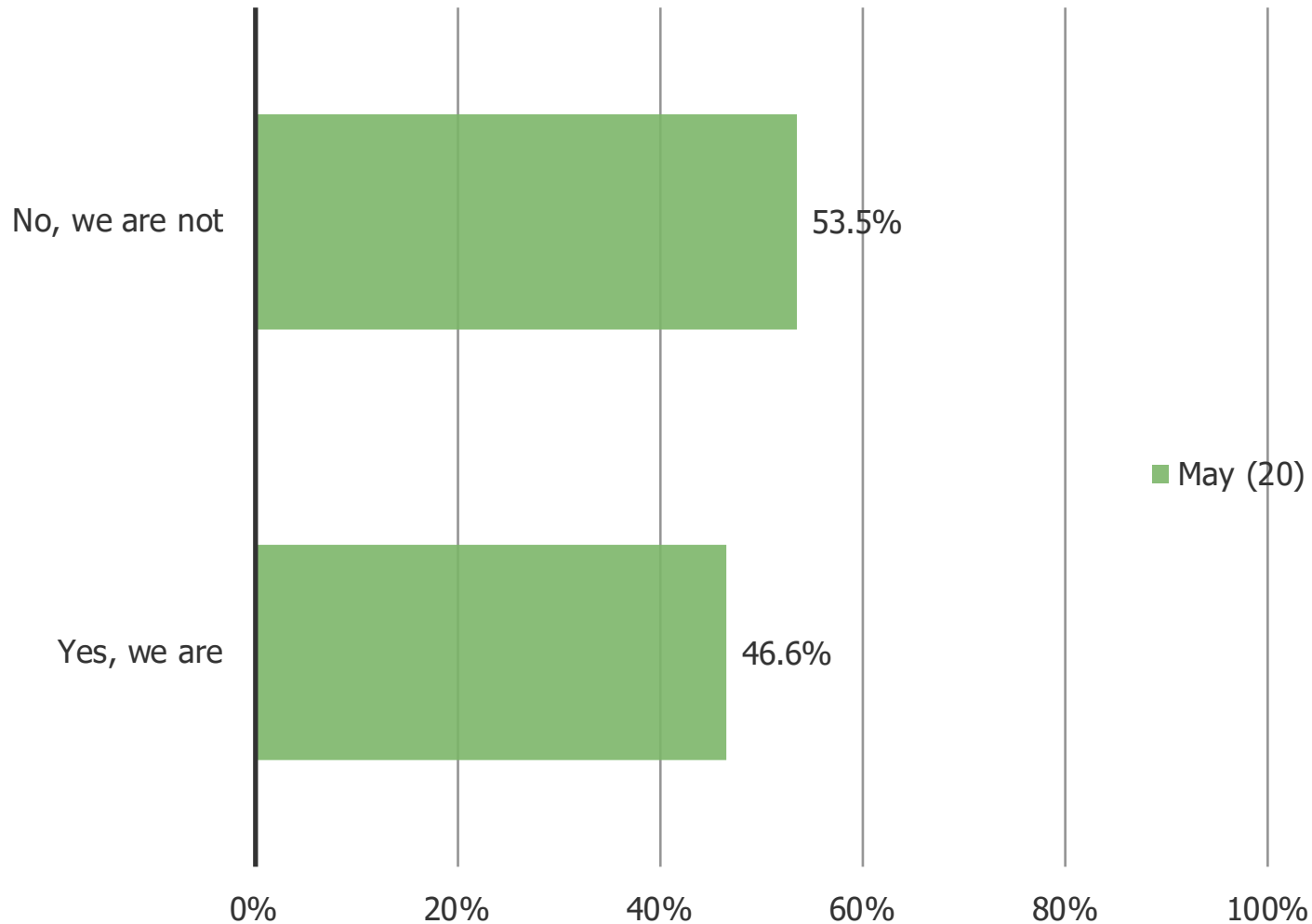
Sections:

- I. Third Party Food Delivery App Usage
- II. Competitive Dynamics and Food Delivery Sentiment Overall
- III. Drill-Downs With Users of Each Platform
- IV. Restaurants Who Are Currently NOT On Third Party Food Delivery Platforms
 - I. Restaurant Capacity and Re-Opening
 - II. Re-Hiring
 - III. Business Sentiment and Expectations



Is your restaurant available on third-party food delivery apps? (IE, Uber Eats, DoorDash, Grubhub, Postmates, or others?)

Posed to all respondents.



n=174



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I. Restaurant Capacity and Re-Opening

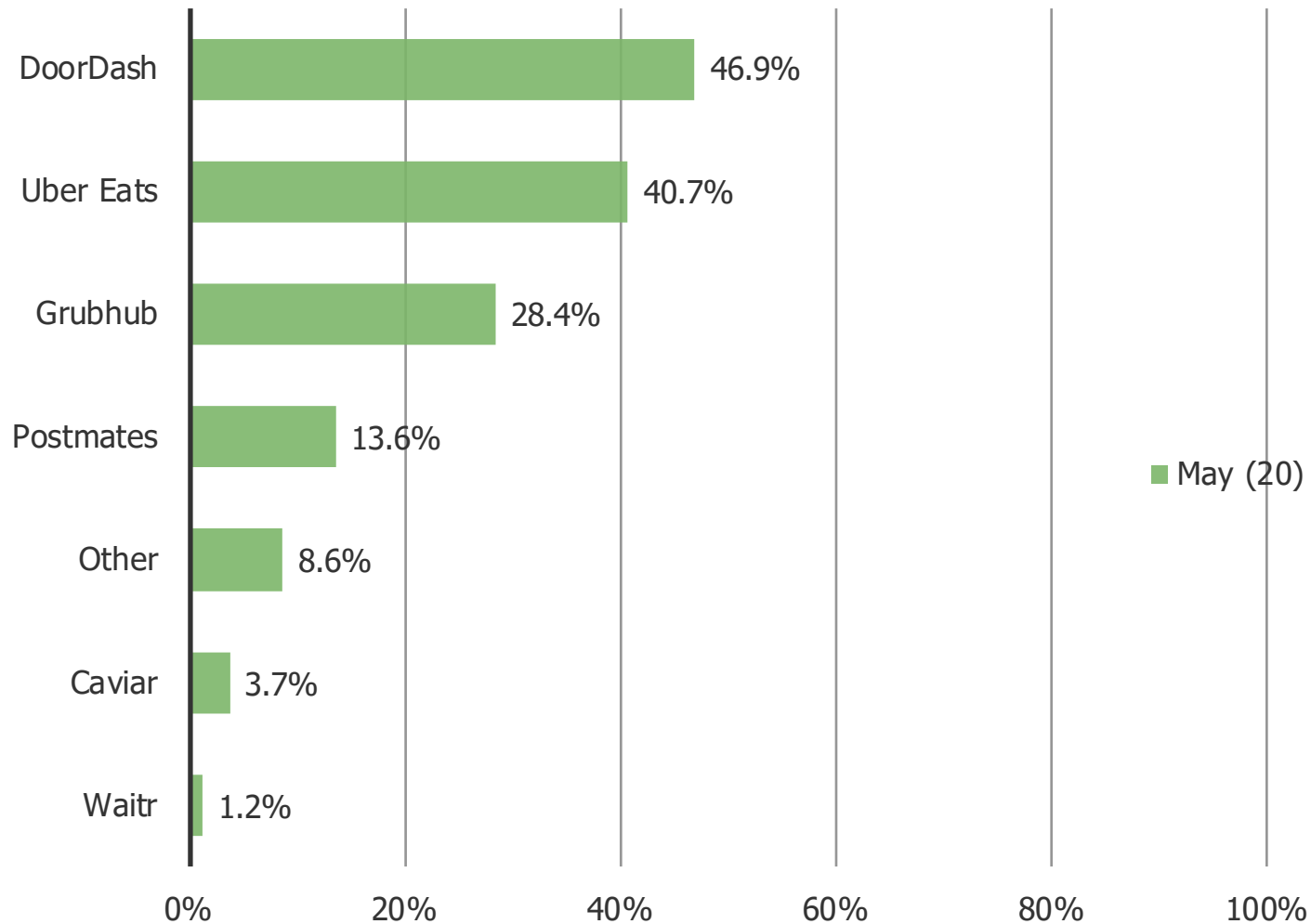
II. Re-Hiring

III. Business Sentiment and Expectations



What is your favorite food delivery partner? (Select 1 or 2 choices)

Posed to respondents who are available on third-party food delivery apps.

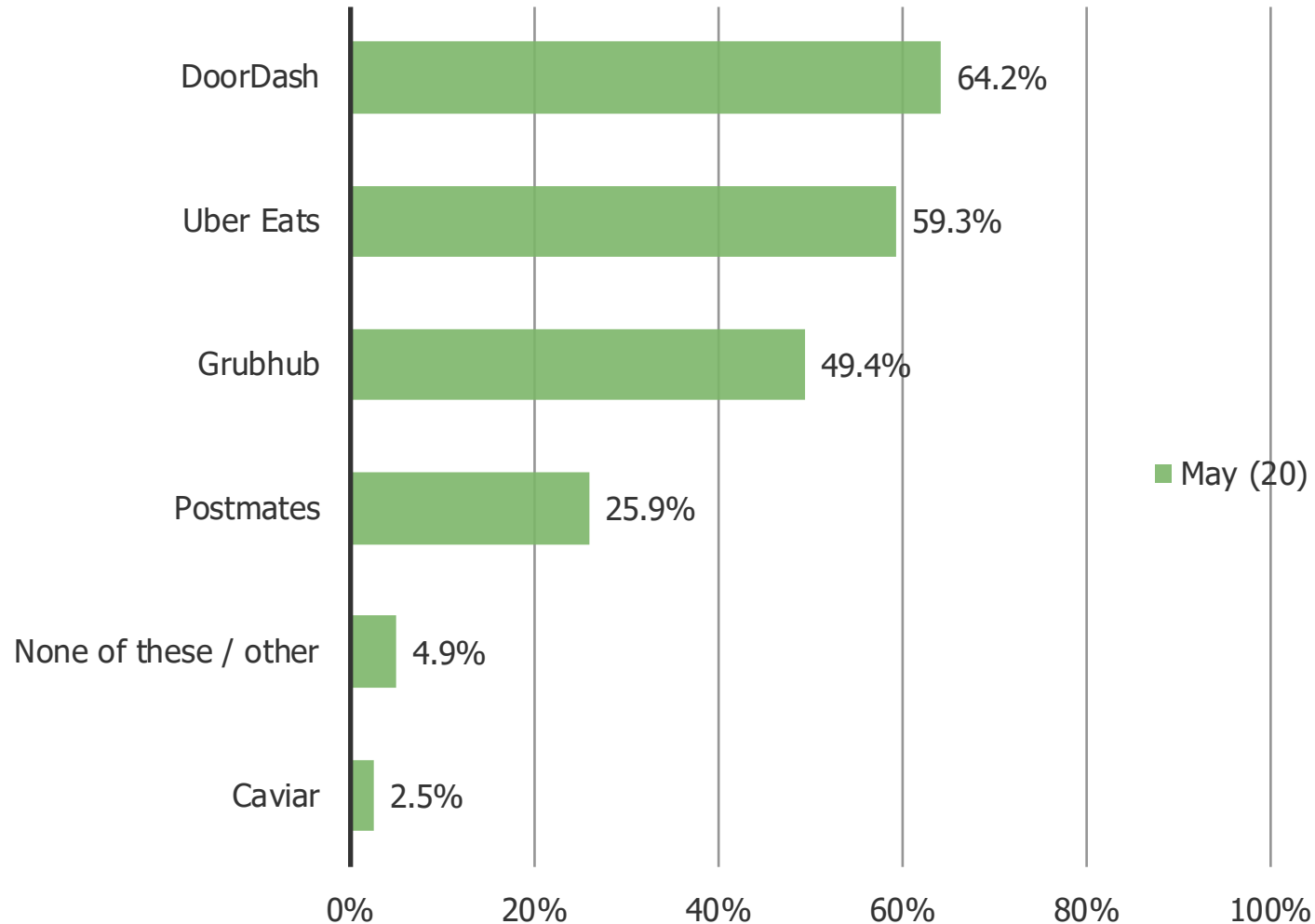


n=81



Which of the following third-party food delivery apps is your restaurant currently available on?

Posed to respondents who are available on third-party food delivery apps.

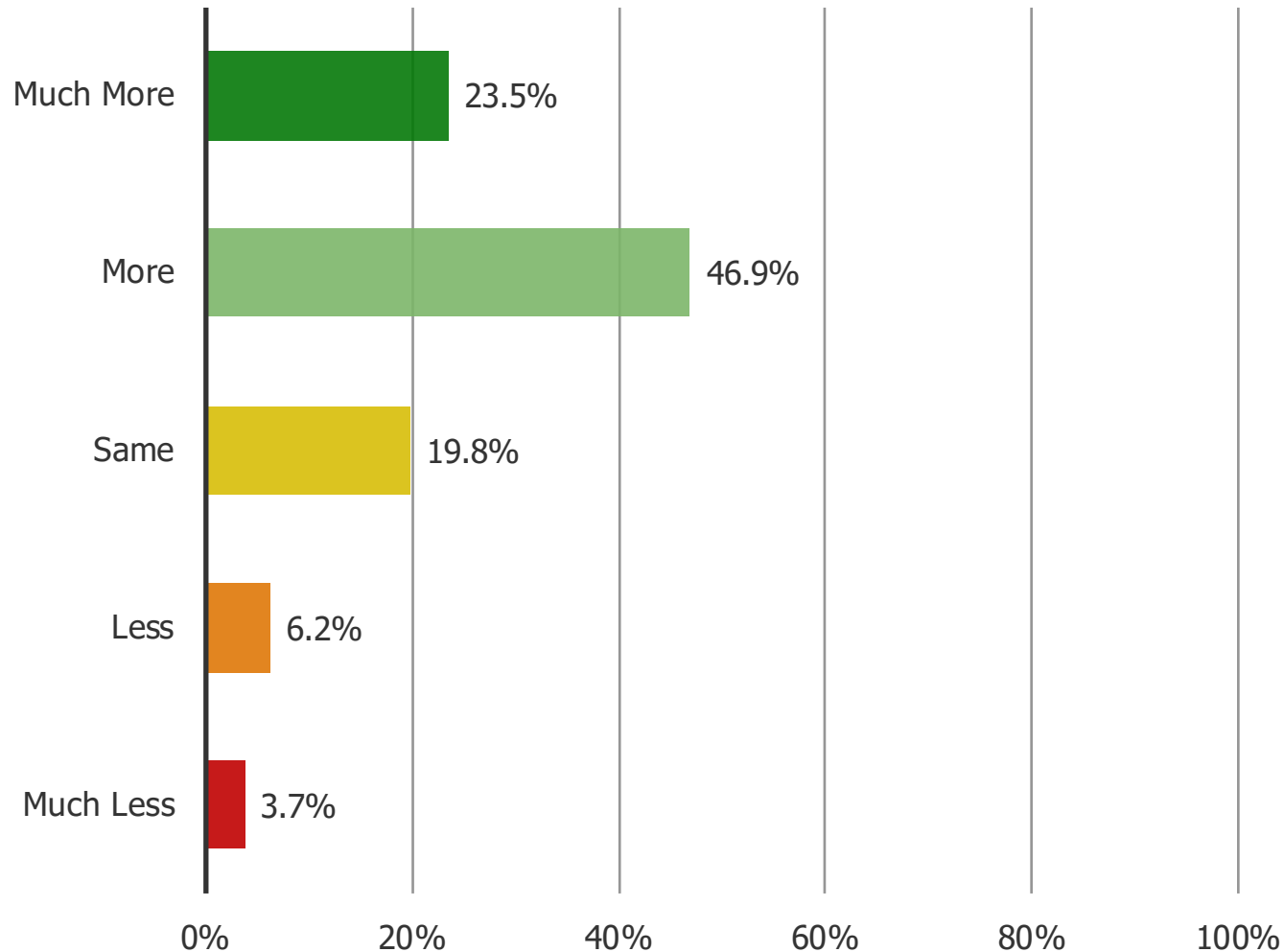


n=81



Do you believe consumers will order more or less food using food delivery apps in two years than they do today?

Posed to respondents who are available on third-party food delivery apps.

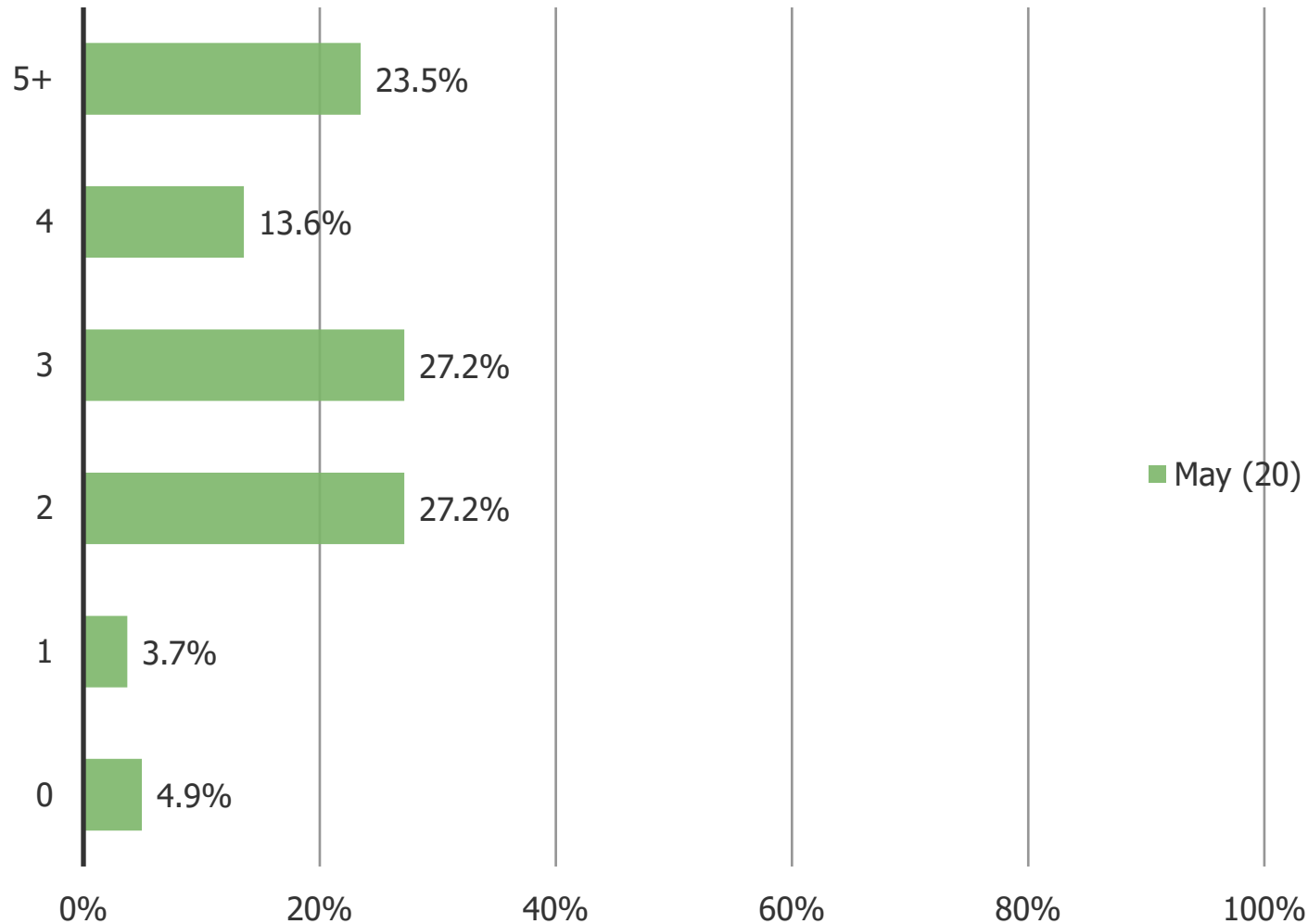


n=81



In four years, how many food delivery companies do you think will have more than 10% market share?

Posed to respondents who are available on third-party food delivery apps.

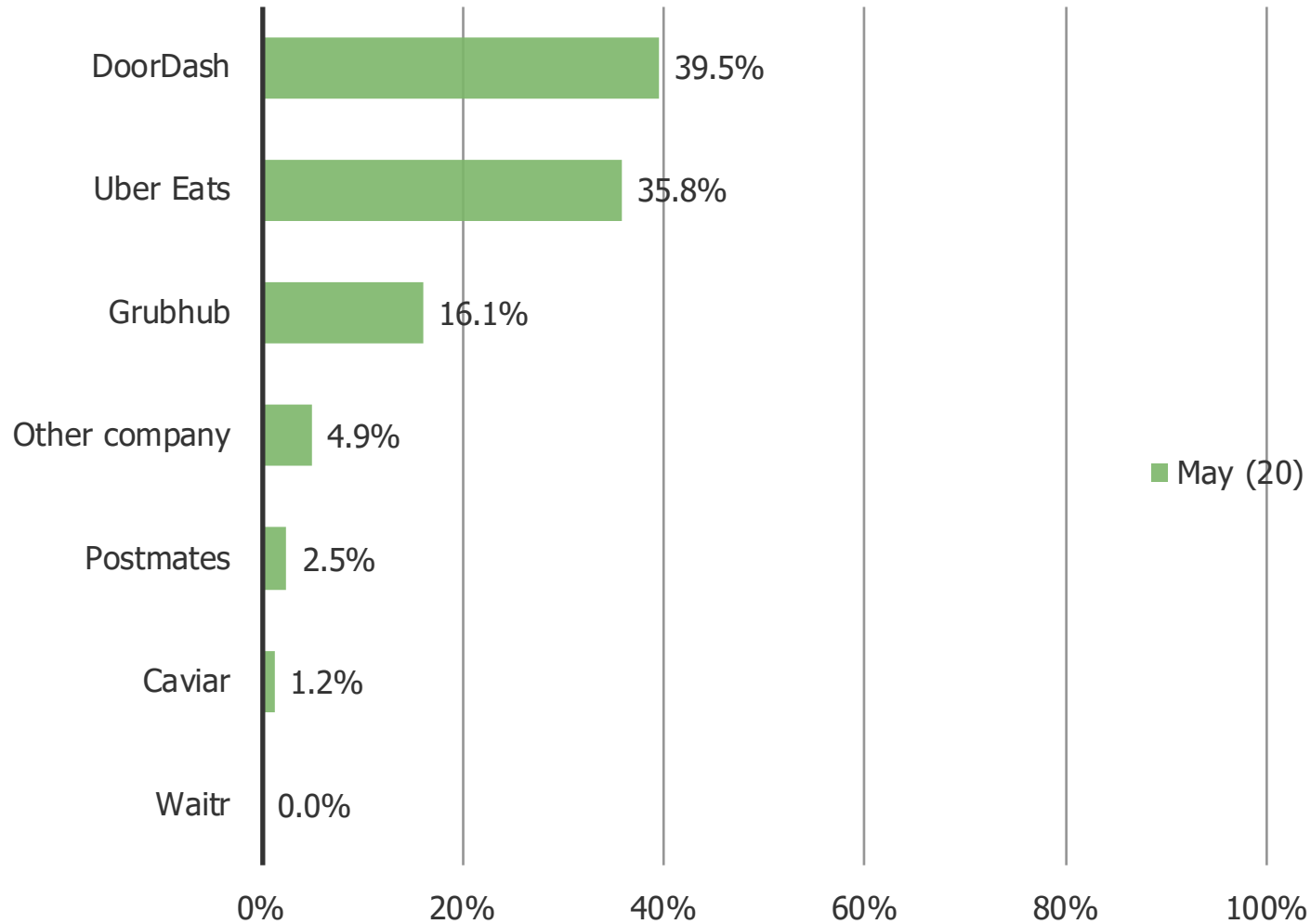


n=81



Which company do you think will be the market share leader among food delivery apps in five years?

Posed to respondents who are available on third-party food delivery apps.

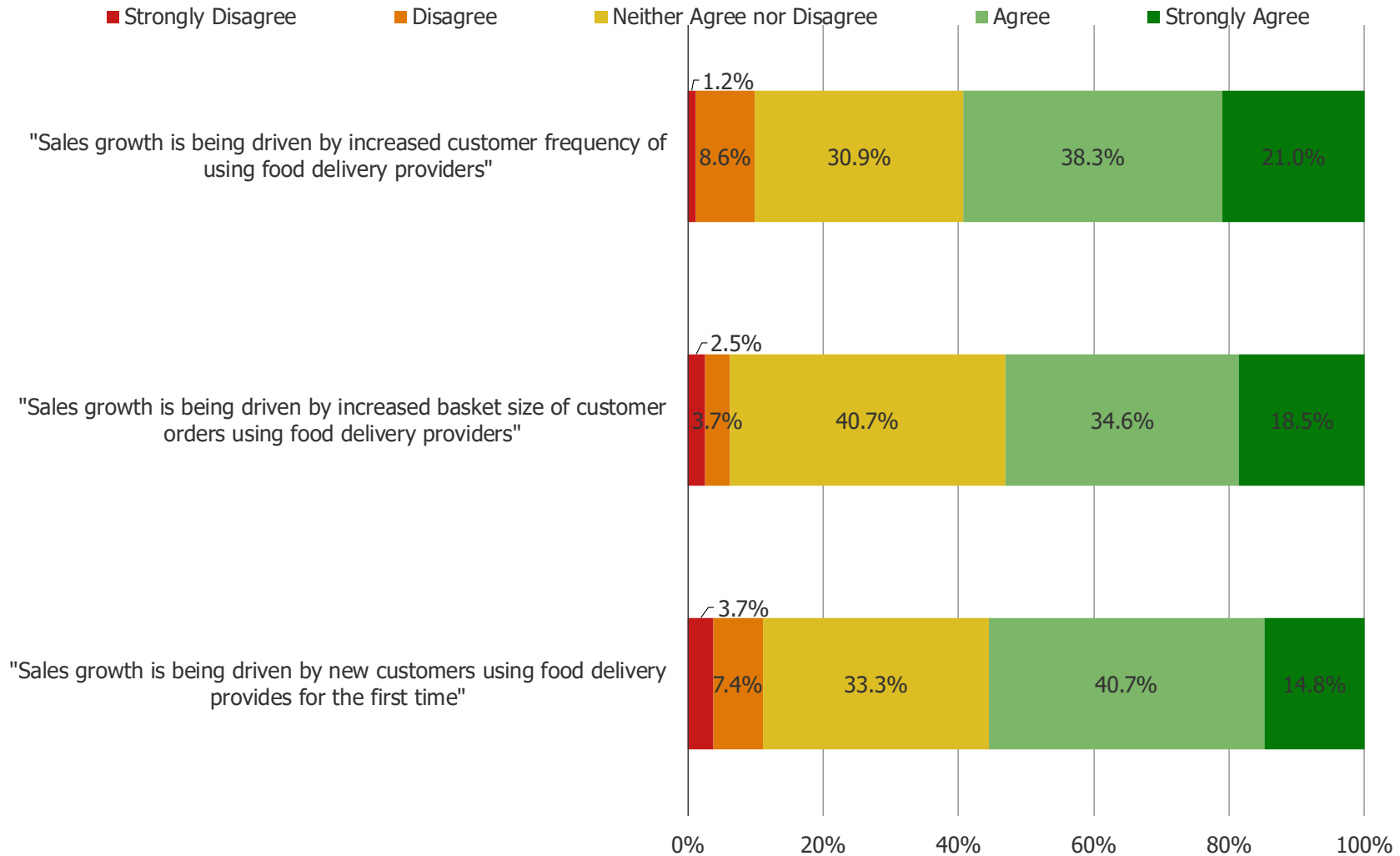


n=81



Thinking about your restaurants usage of third-party food delivery apps, how much do you agree with the following statements?

Posed to respondents who are available on third-party food delivery apps.

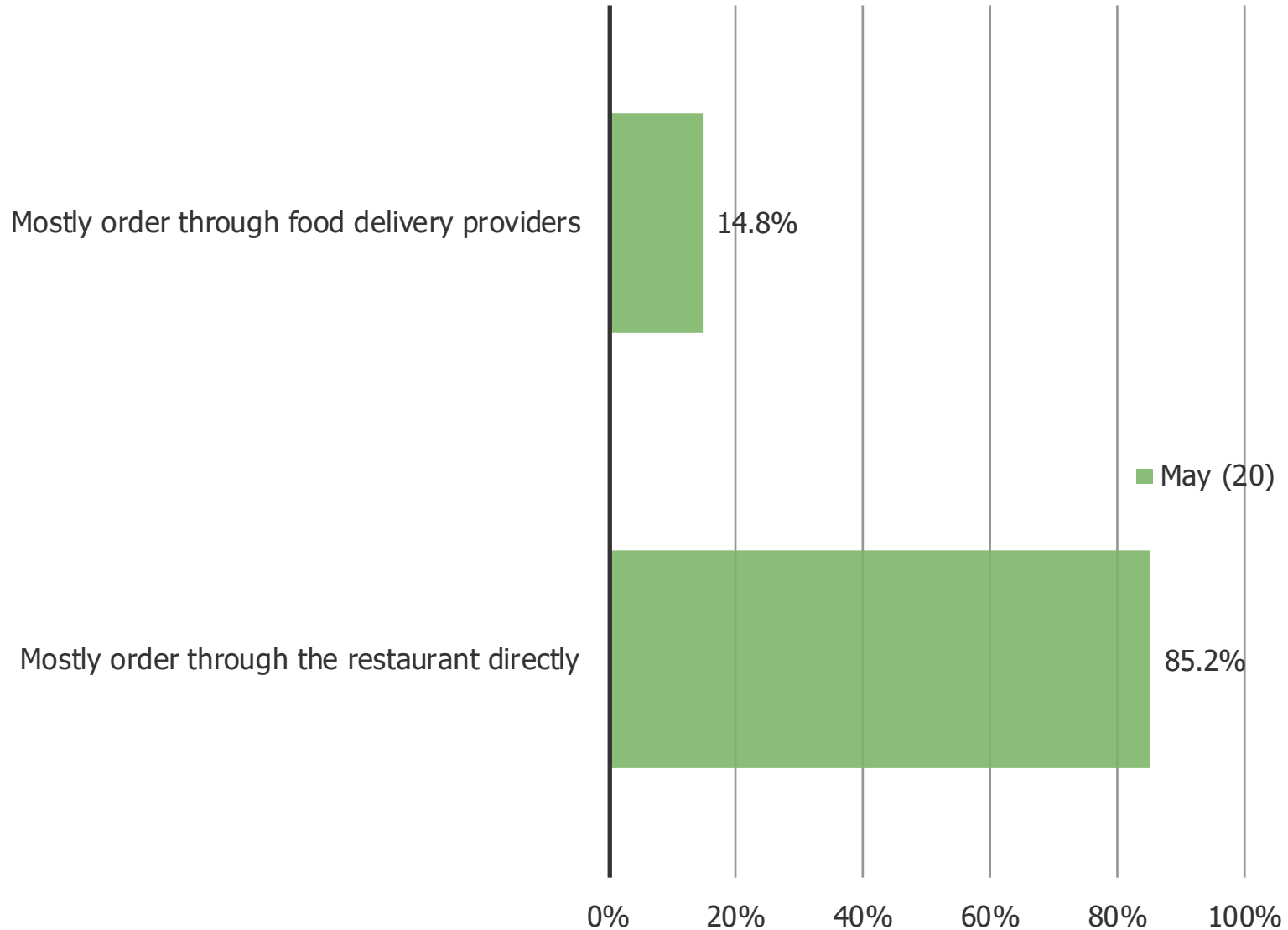


n=81



Do your most loyal customers...

Posed to respondents who are available on third-party food delivery apps.

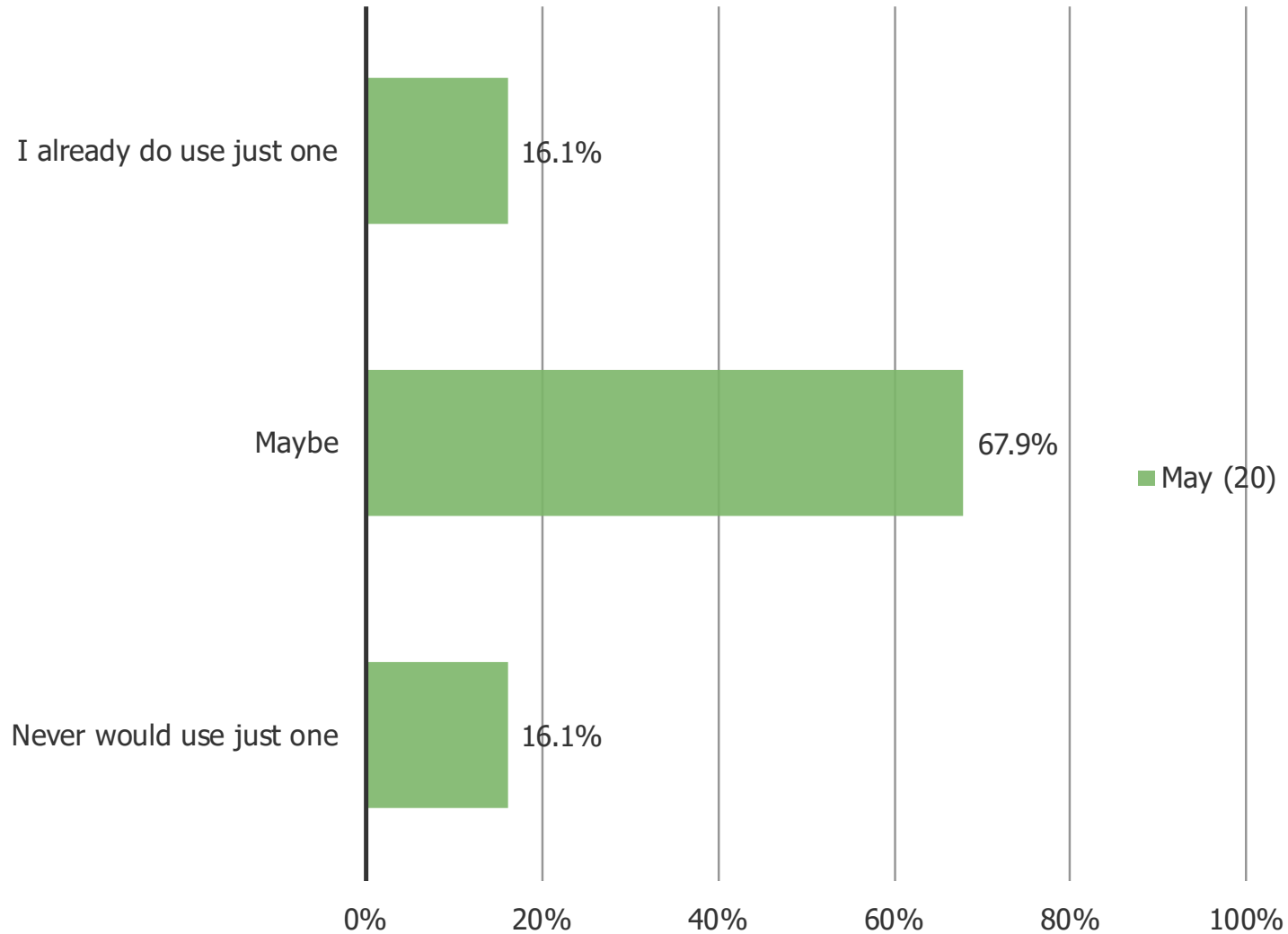


n=81



Would you prefer to exclusively work with one third-party food delivery partner to streamline operations?

Posed to respondents who are available on third-party food delivery apps.

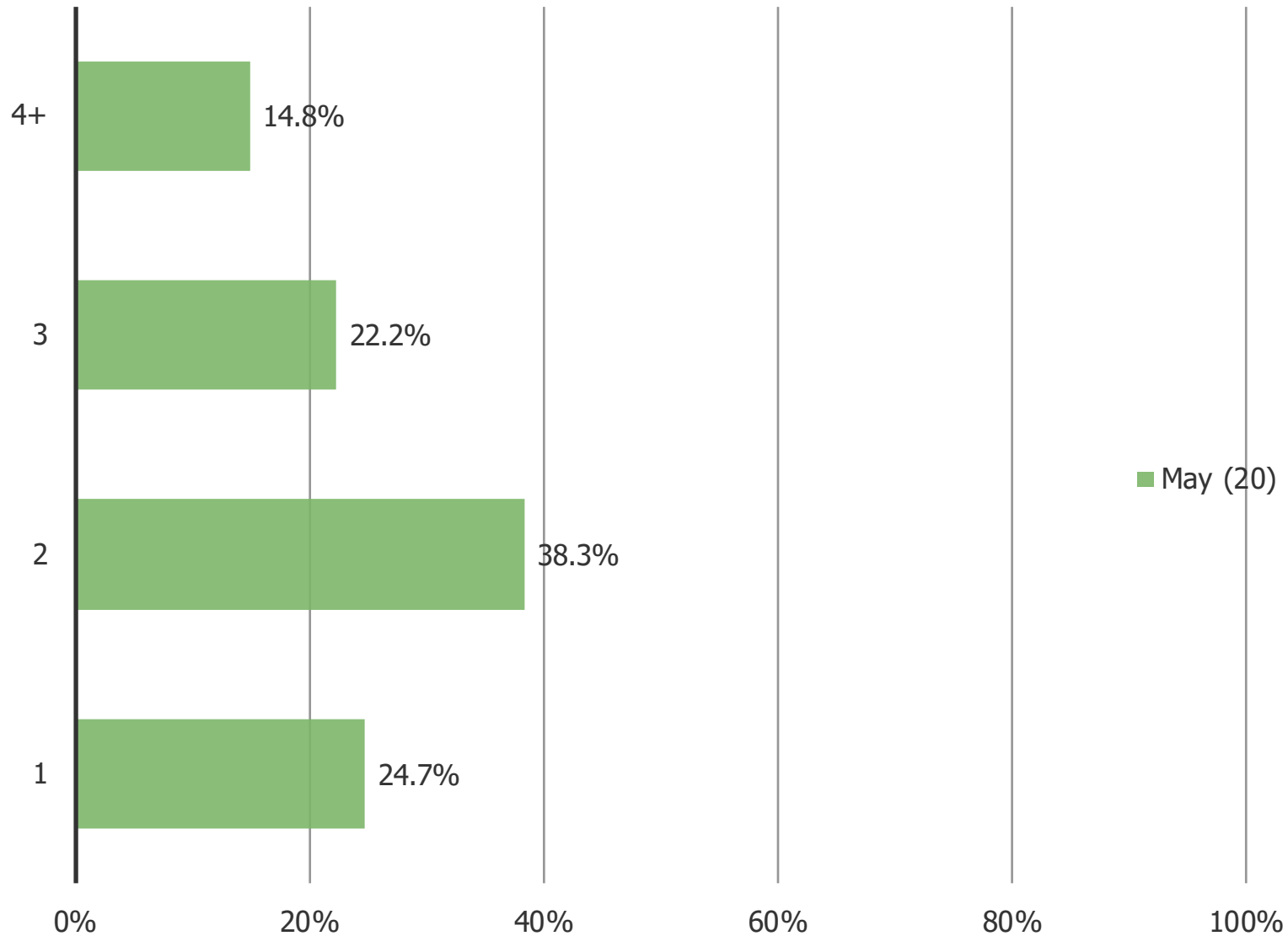


n=81



How many third-party food delivery partners do you currently use?

Posed to respondents who are available on third-party food delivery apps.

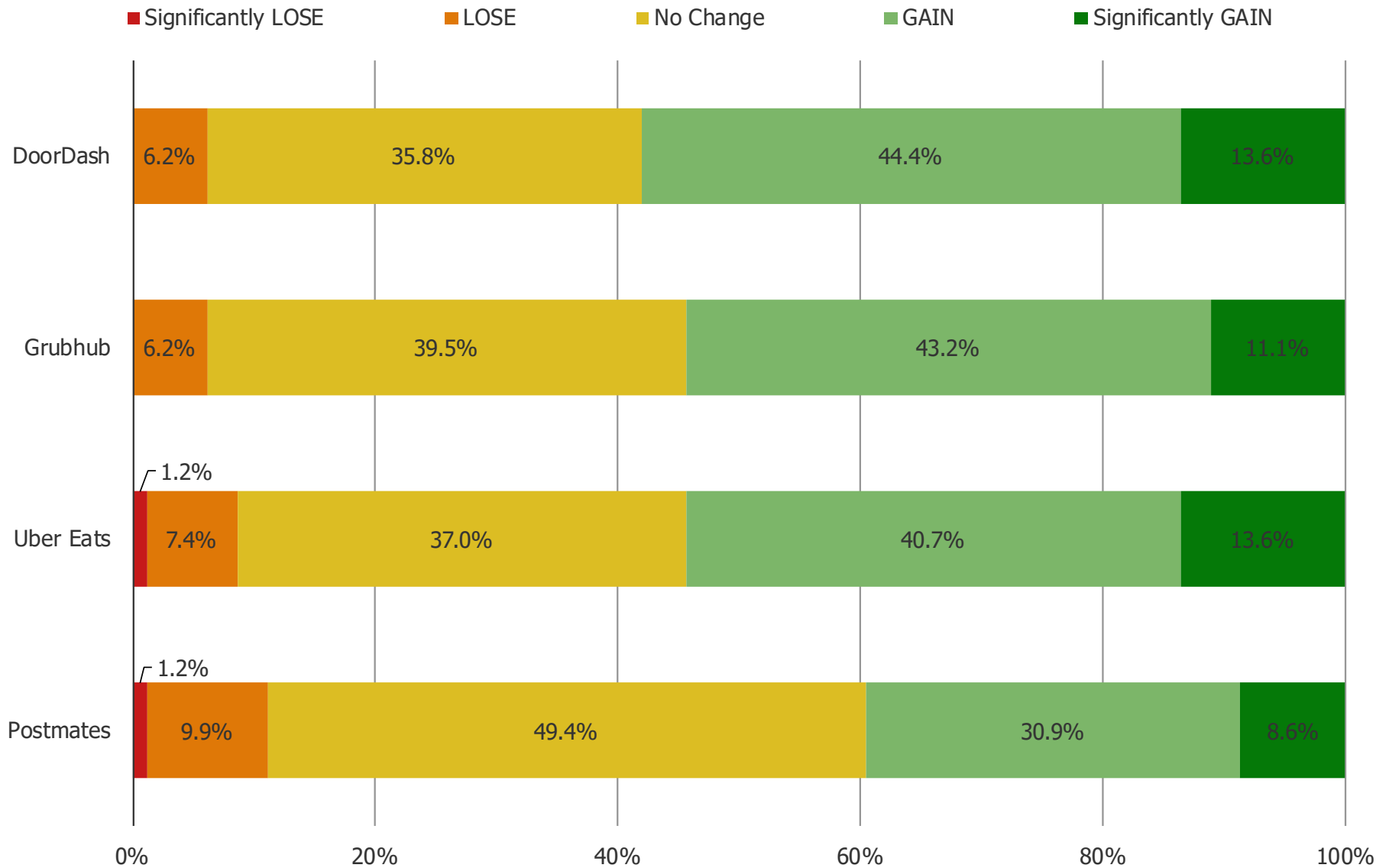


n=81



Do you expect the following providers to win or lose market share going forward?

Posed to respondents who are available on third-party food delivery apps.



n=81



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NOTE: For the following questions, respondents are shown each platform they said they are currently available on. N counts listed below.

DoorDash: N = 52

Uber Eats: N = 48

Grubhub: N = 40

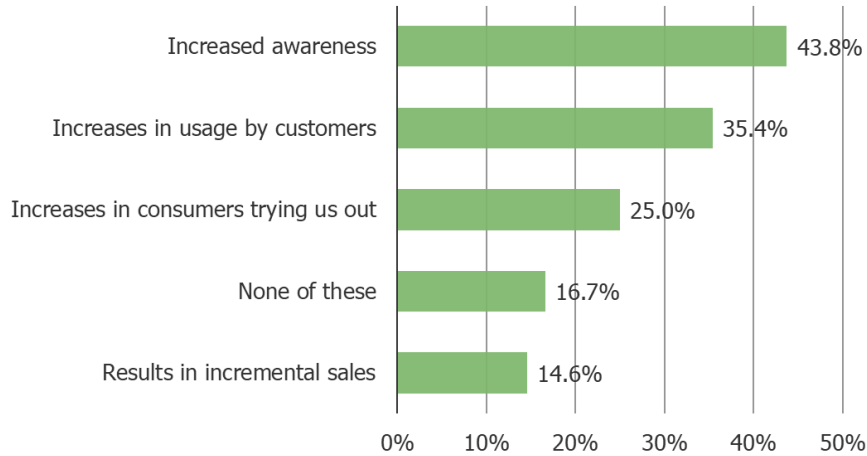
Postmates: N = 20



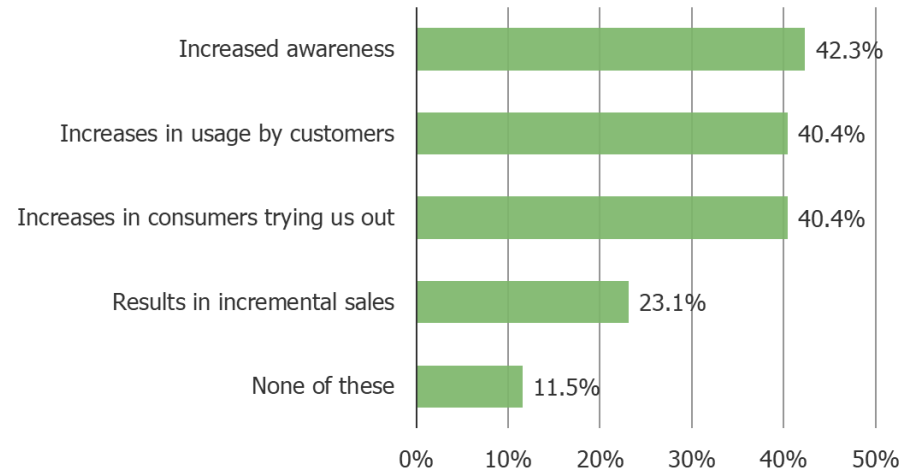
Which of the following would you say this provider brings to the table for you? (Select ALL that apply)

Posed to respondents who are available on the following third-party food delivery apps.

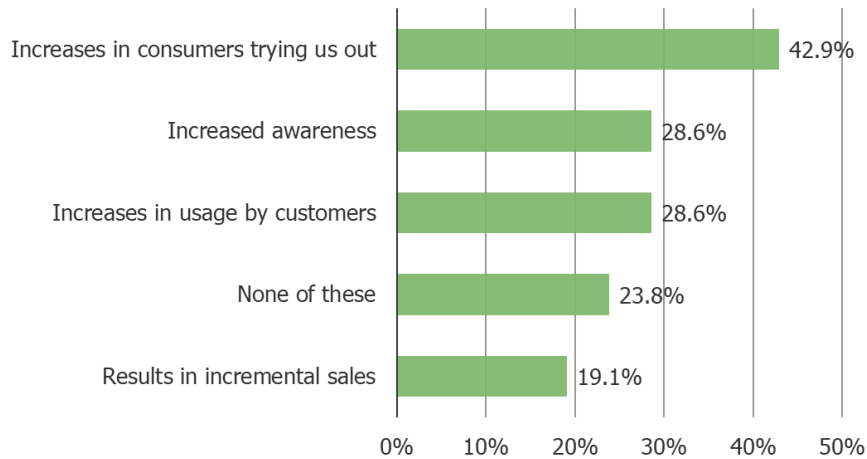
Uber Eats



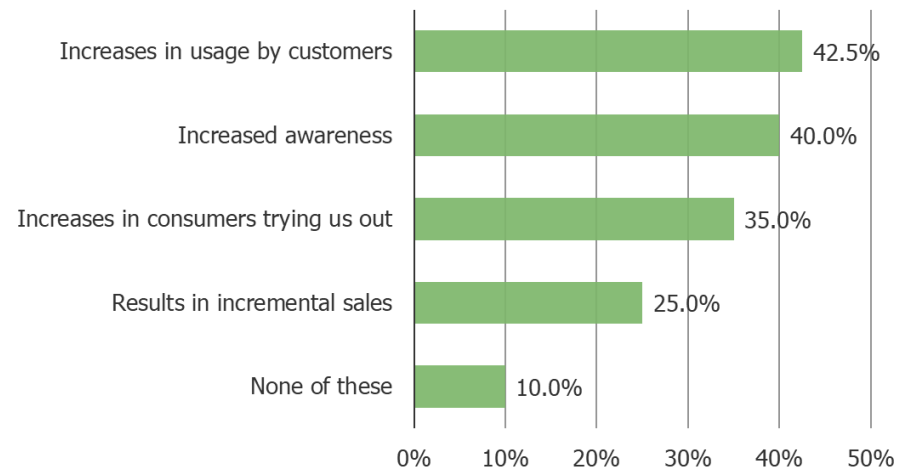
DoorDash



Postmates

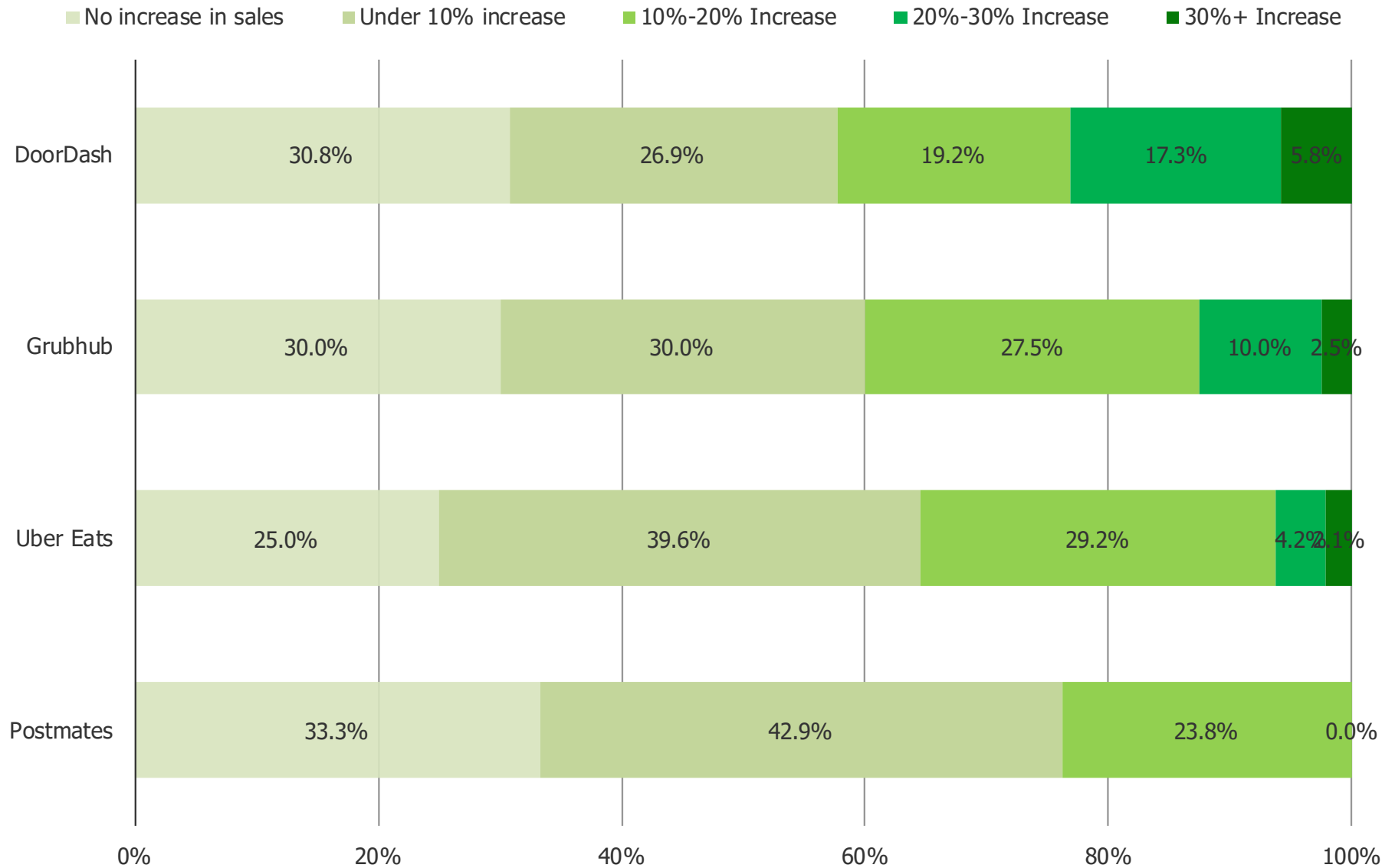


Grubhub



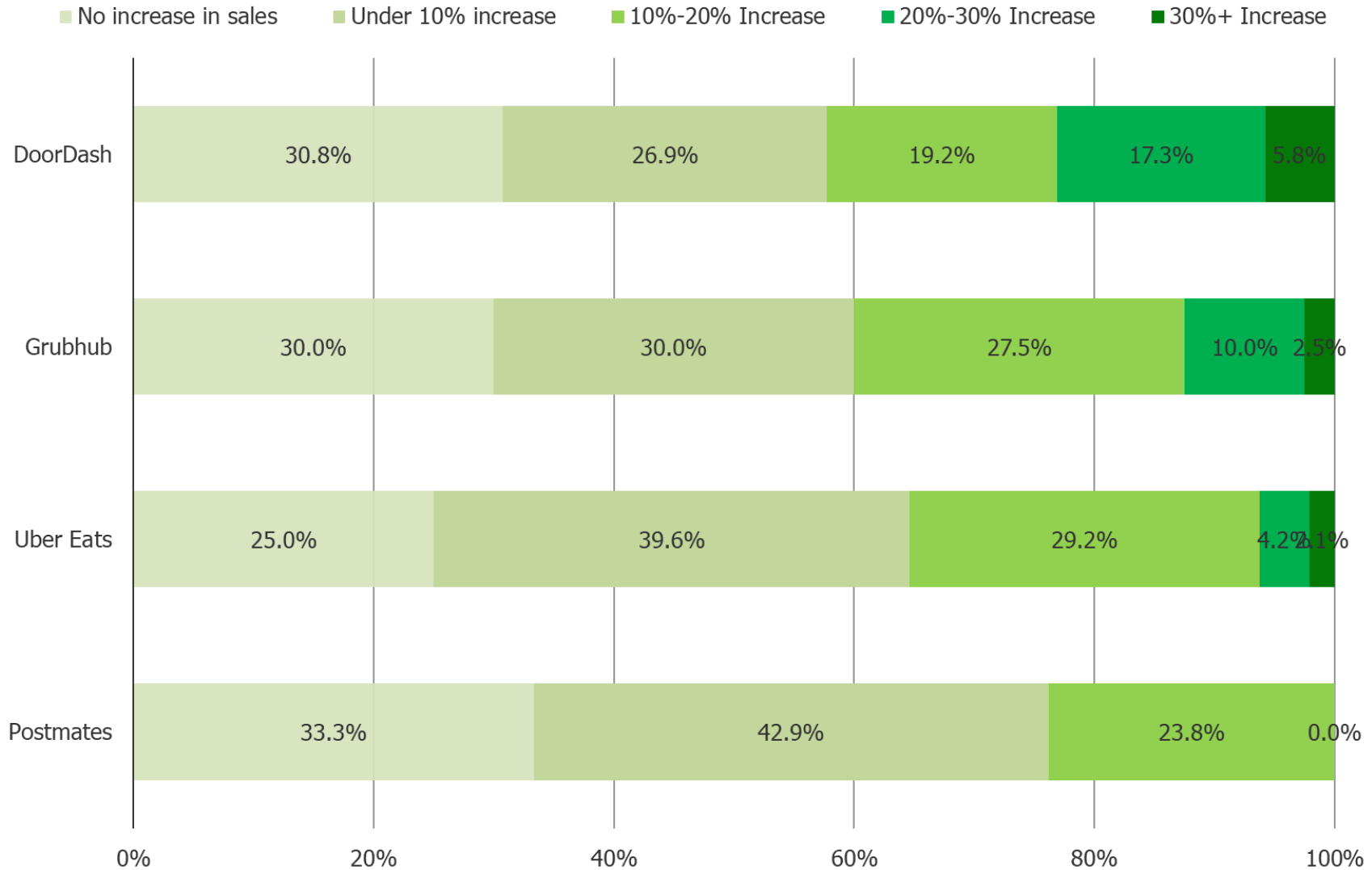
Have your sales increased because of this food delivery company?

Posed to respondents who are available on the following third-party food delivery apps.



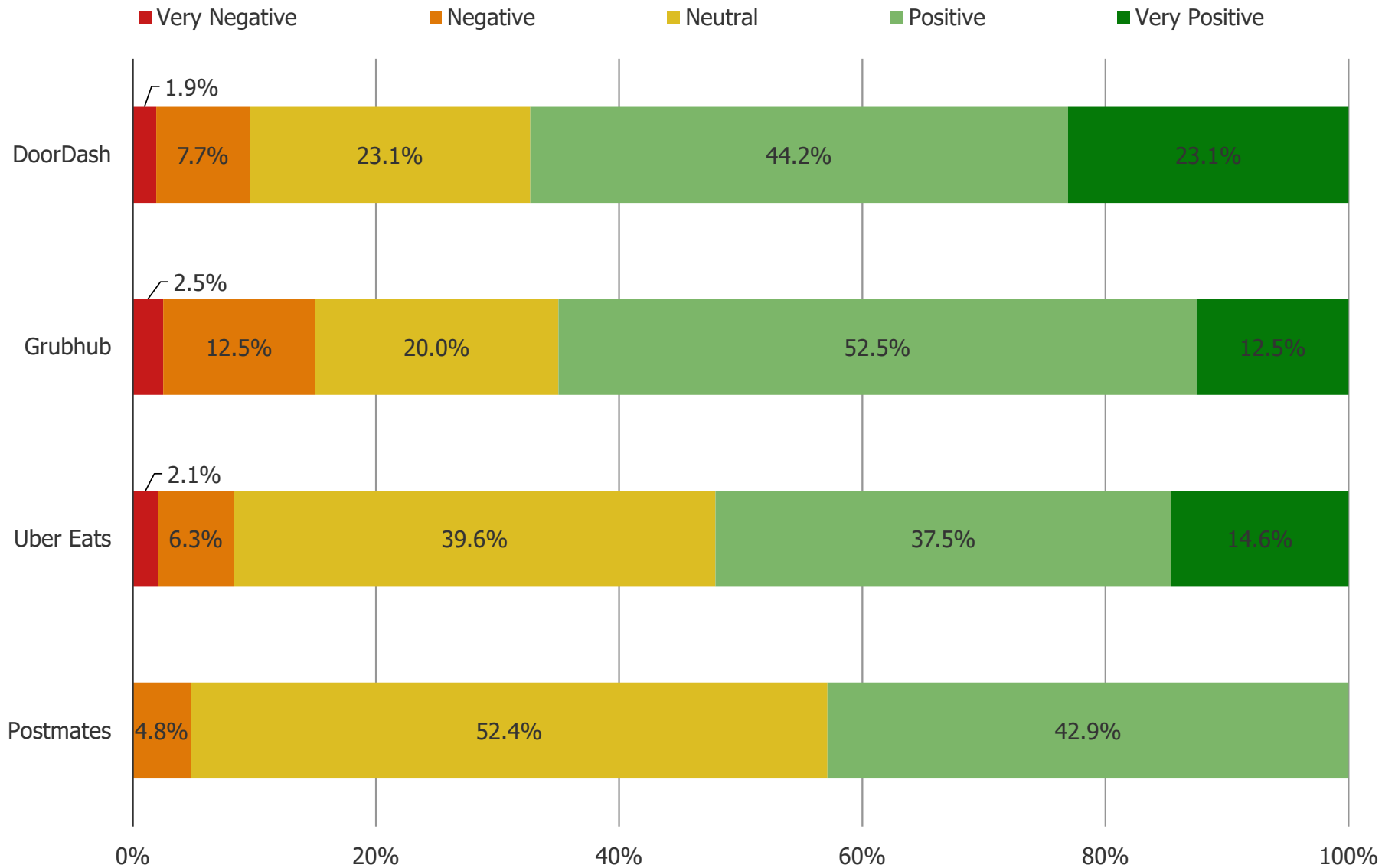
Have your profits increased because of this food delivery company?

Posed to respondents who are available on the following third-party food delivery apps.



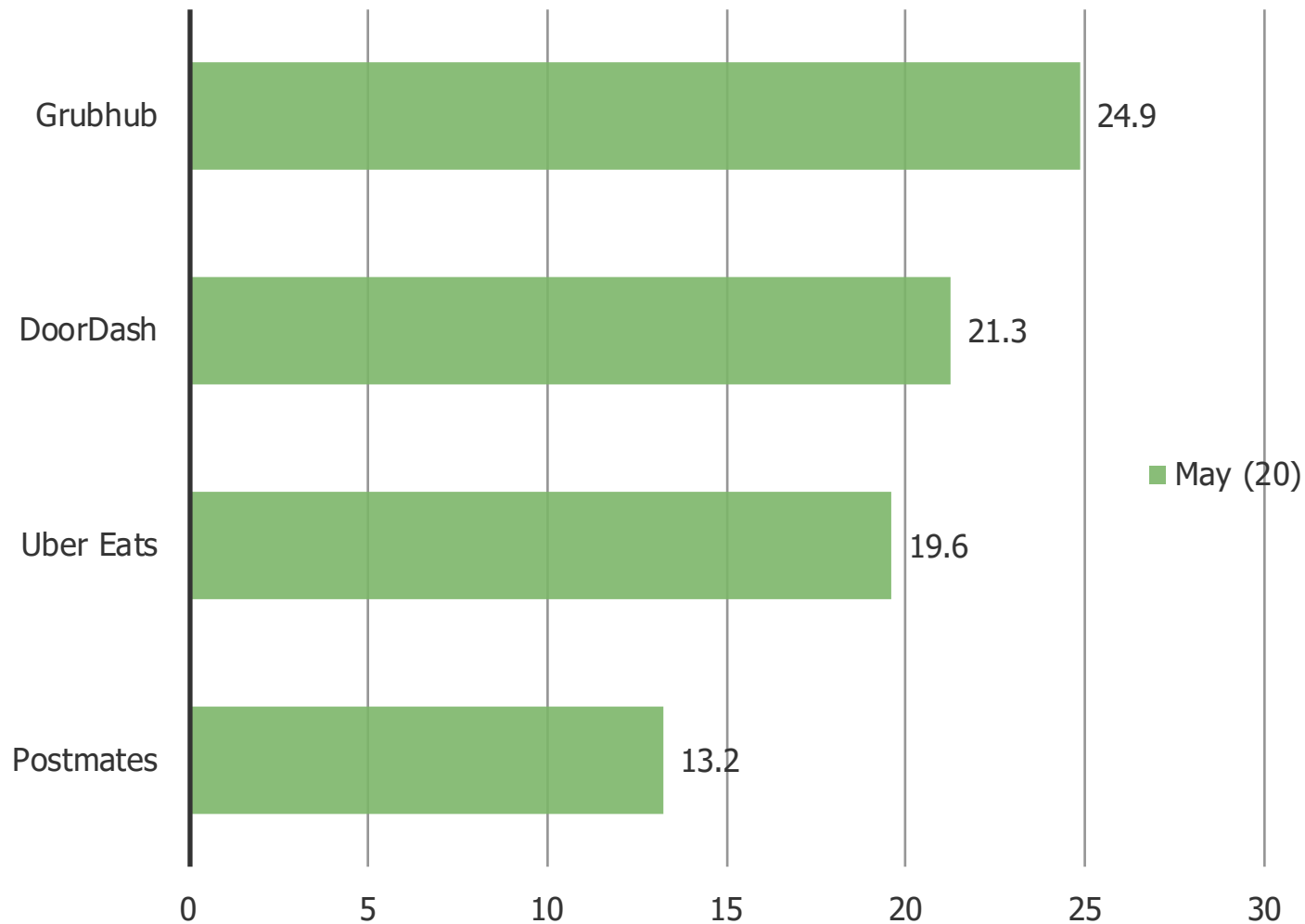
What is your overall opinion of the following delivery partners?

Posed to respondents who are available on the following third-party food delivery apps.



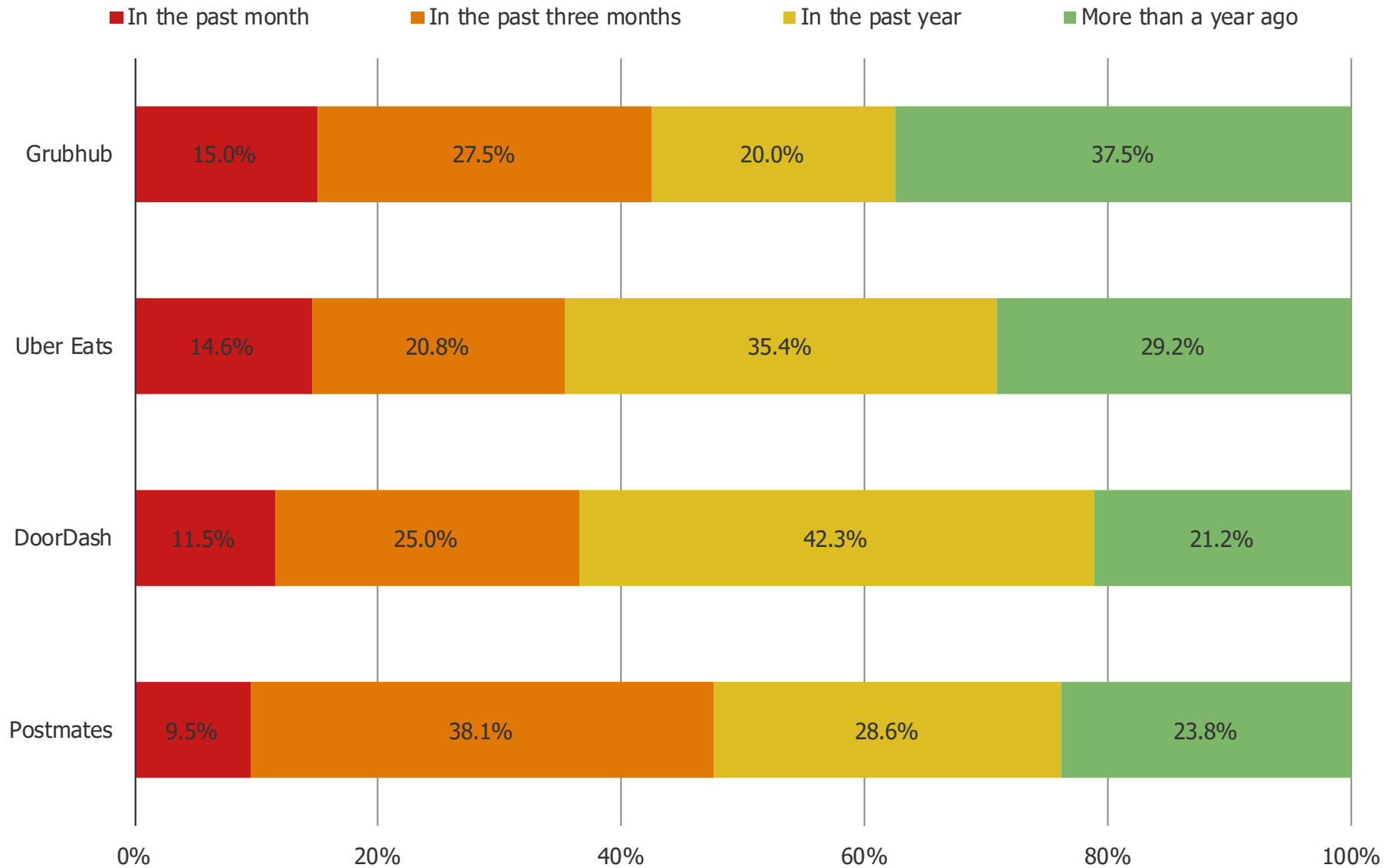
What percentage of your food sales would you approximate comes from this delivery partner? Please do not enter a value above 100

Posed to respondents who are available on the following third-party food delivery apps.



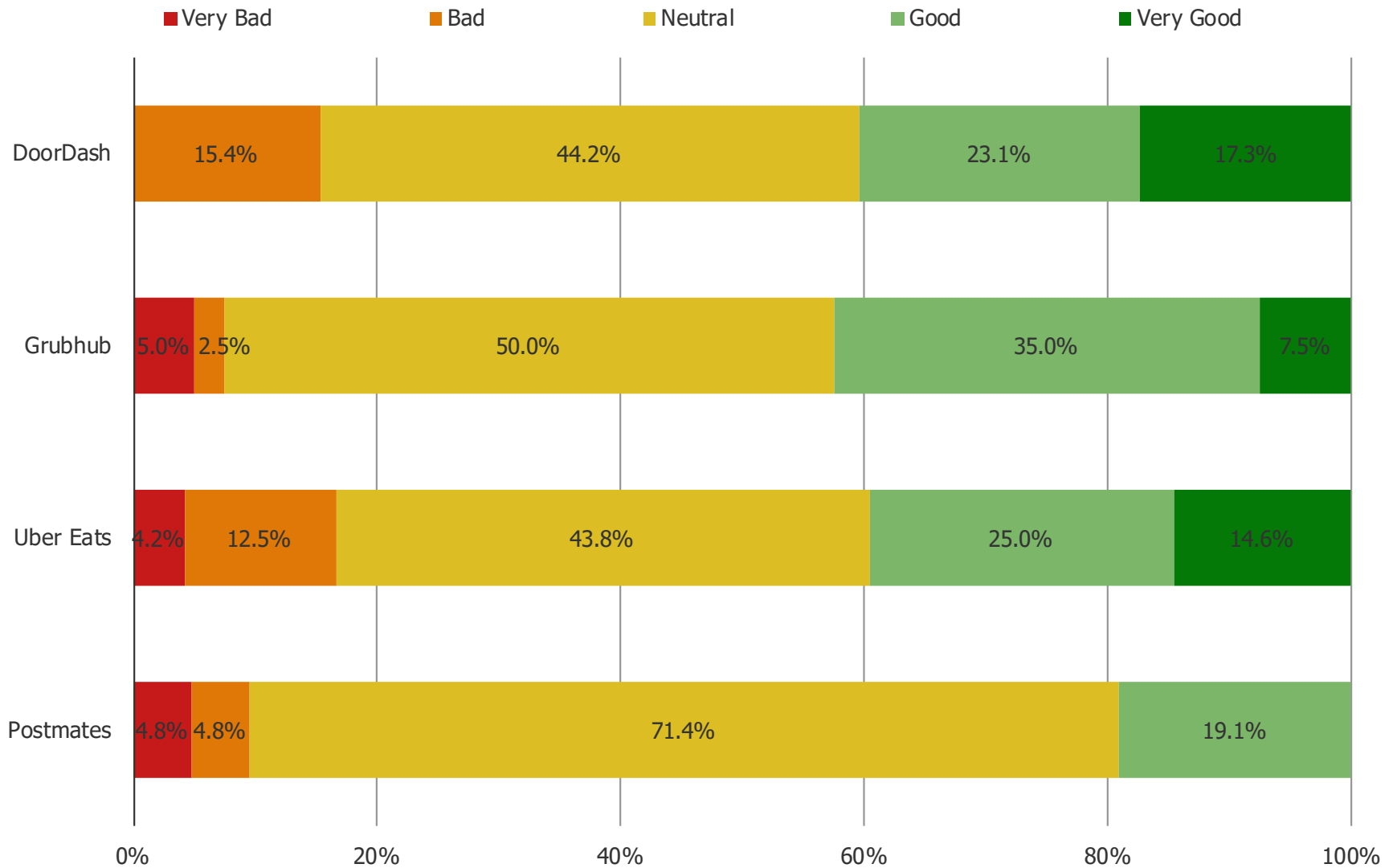
When did you start using the following...?

Posed to respondents who are available on the following third-party food delivery apps.



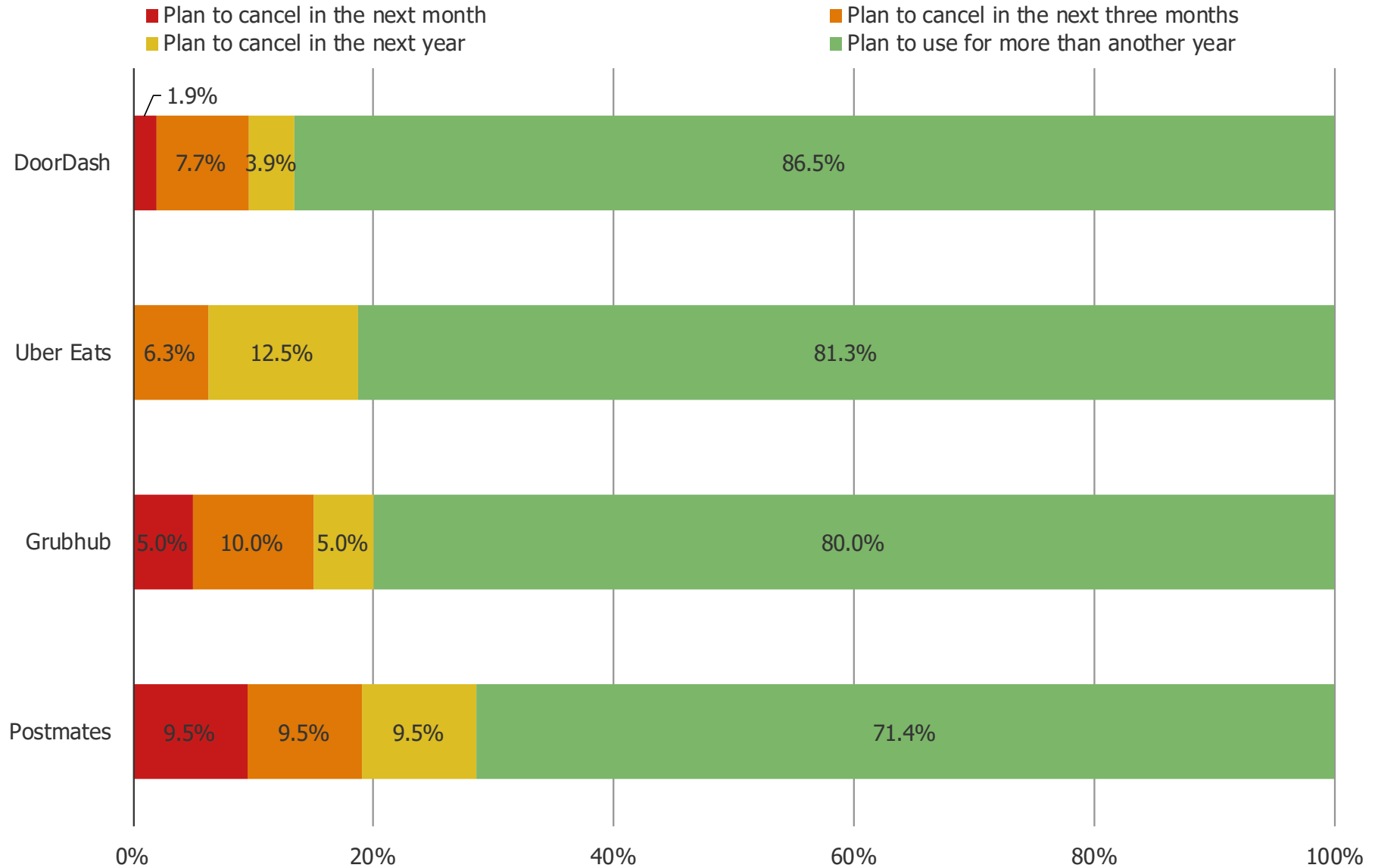
How would you rate the value you receive for the fees you pay to the food delivery partner?

Posed to respondents who are available on the following third-party food delivery apps.



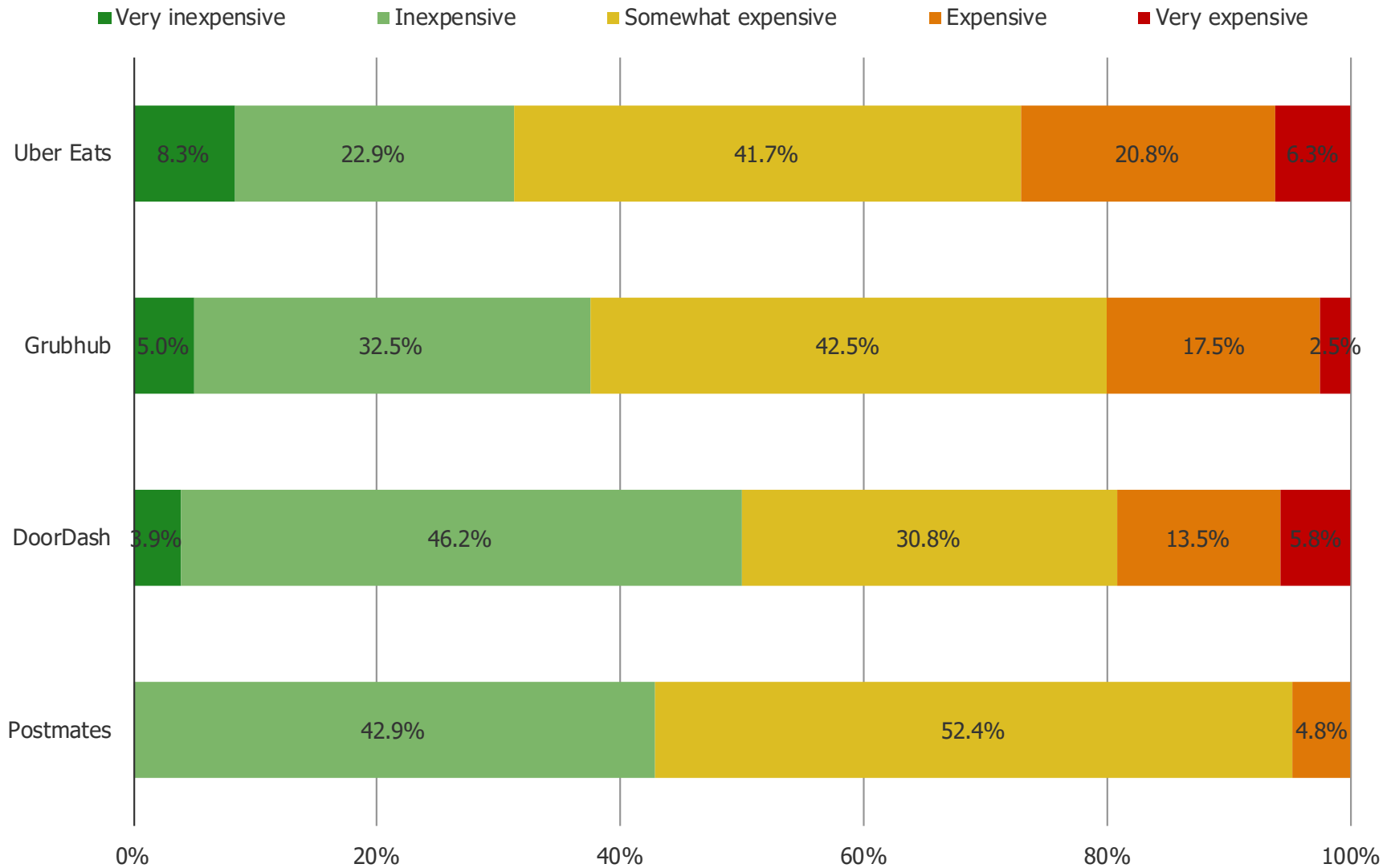
For how much longer do you expect to use the following?

Posed to respondents who are available on the following third-party food delivery apps.



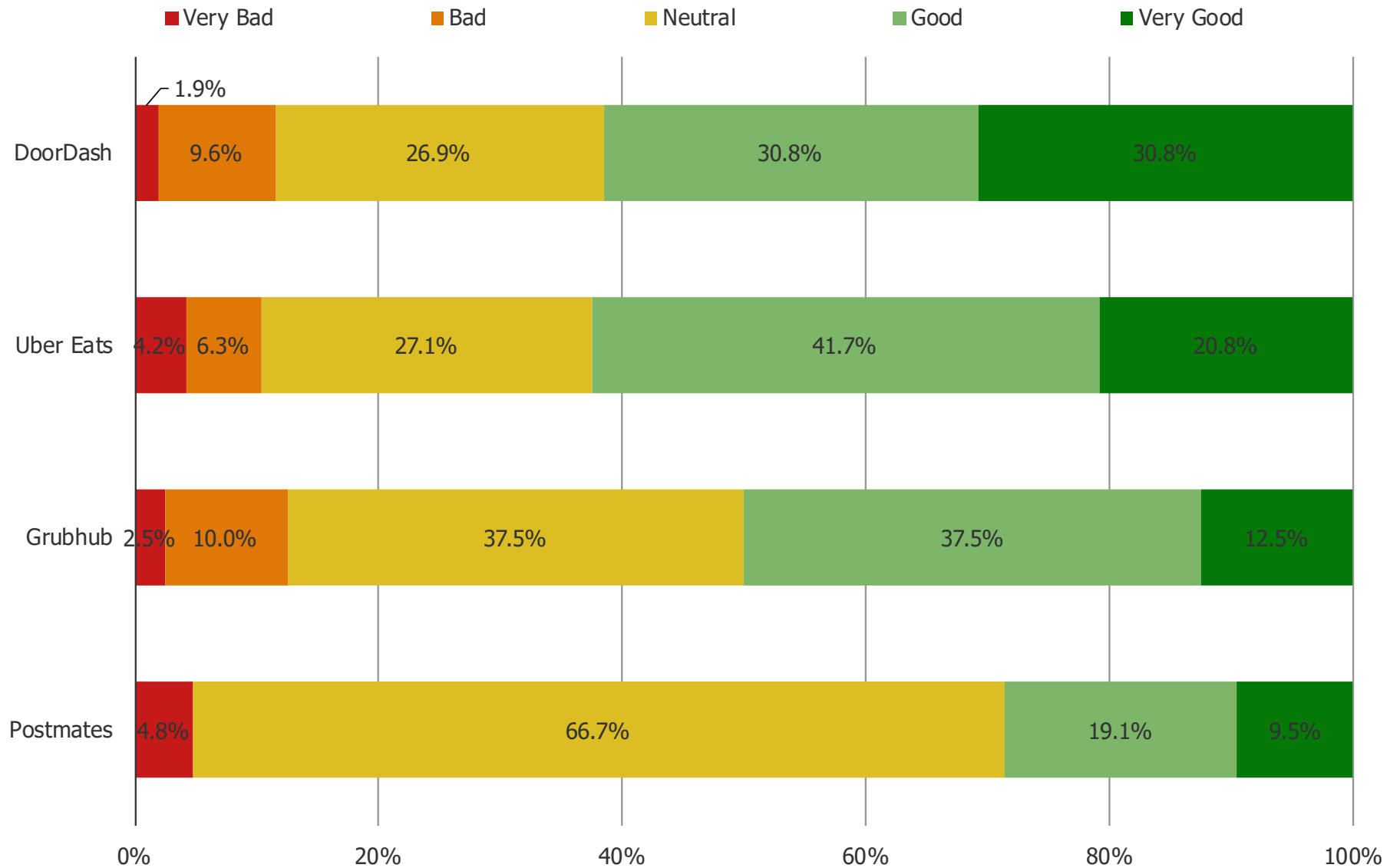
Please rate the following when it comes to the price it costs for delivery (delivery charges plus any times you decide to add)?

Posed to respondents who are available on the following third-party food delivery apps.



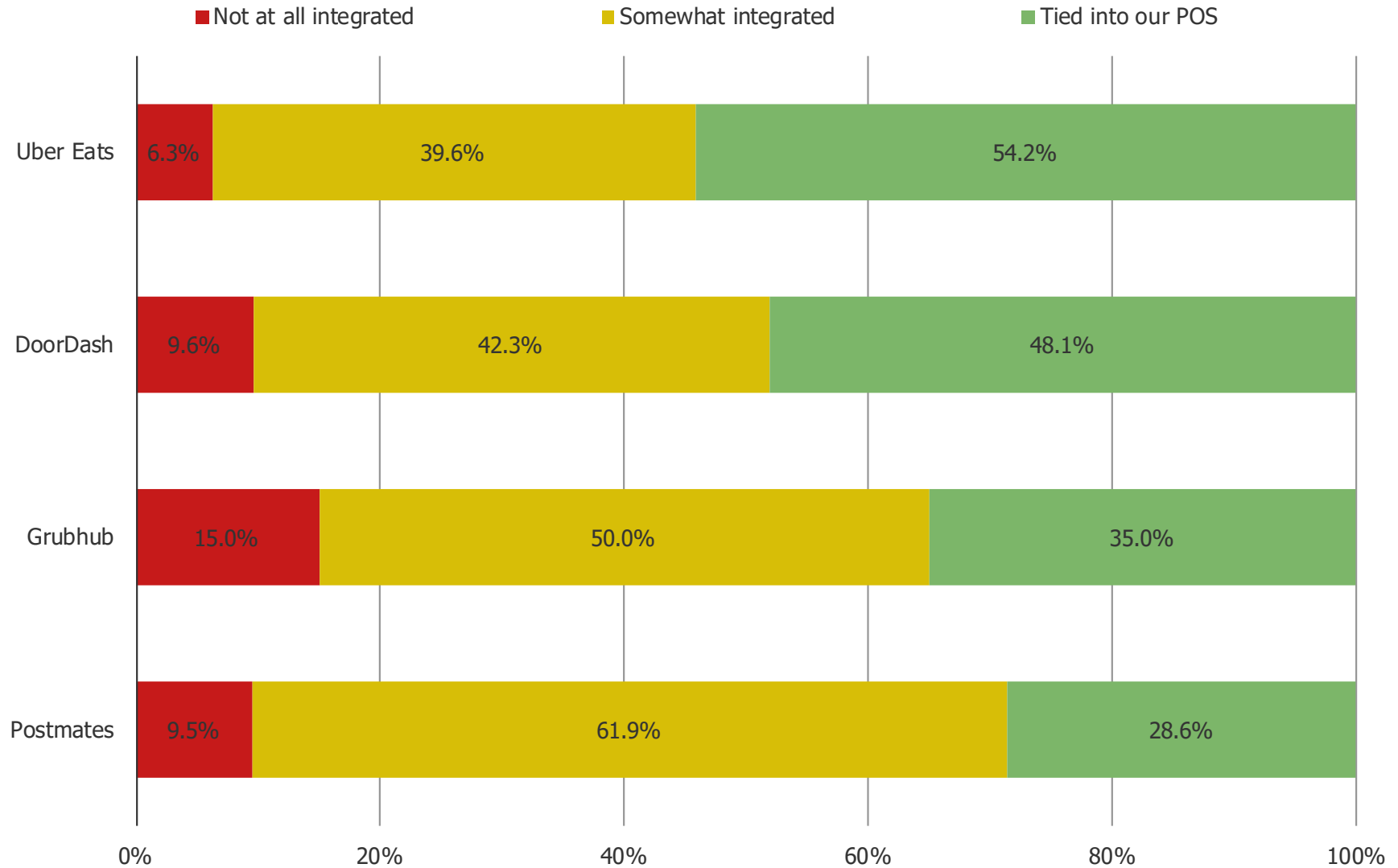
Please rate the following when it comes to speed and accuracy of service?

Posed to respondents who are available on the following third-party food delivery apps.



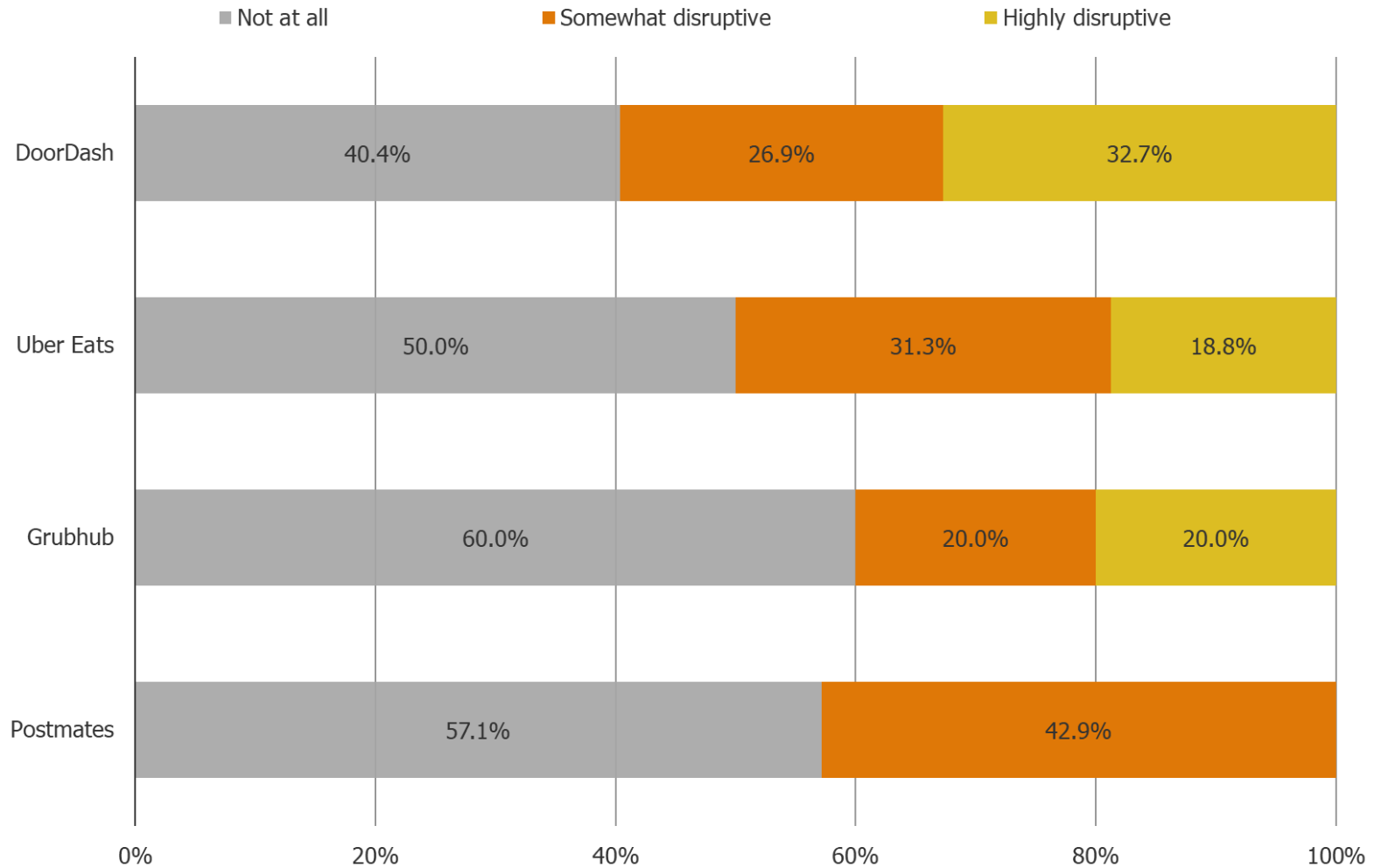
Please rate the following when it comes to being integrated into your food service operations?

Posed to respondents who are available on the following third-party food delivery apps.



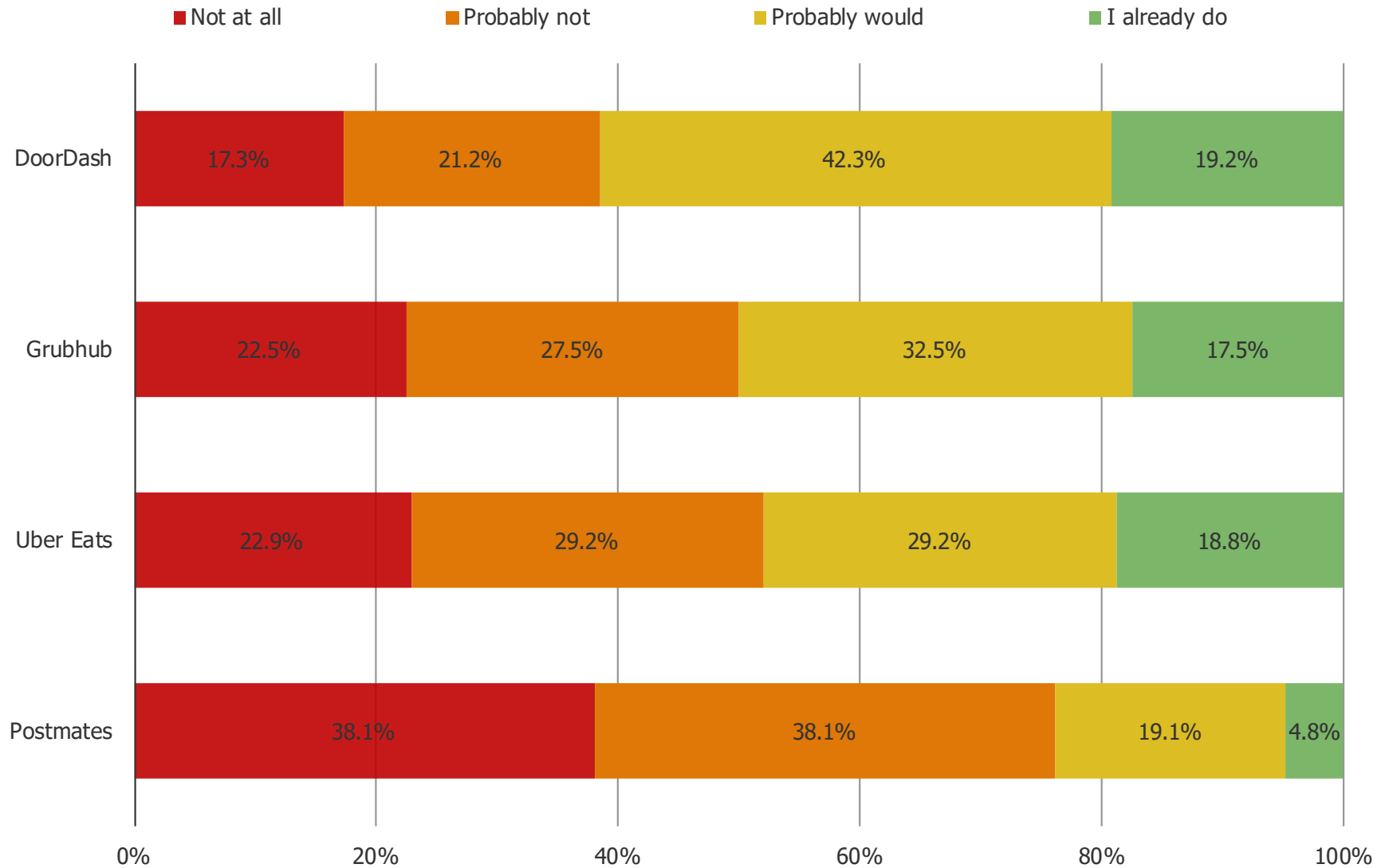
Would it be disruptive to your business to cancel using the following partner...?

Posed to respondents who are available on the following third-party food delivery apps.



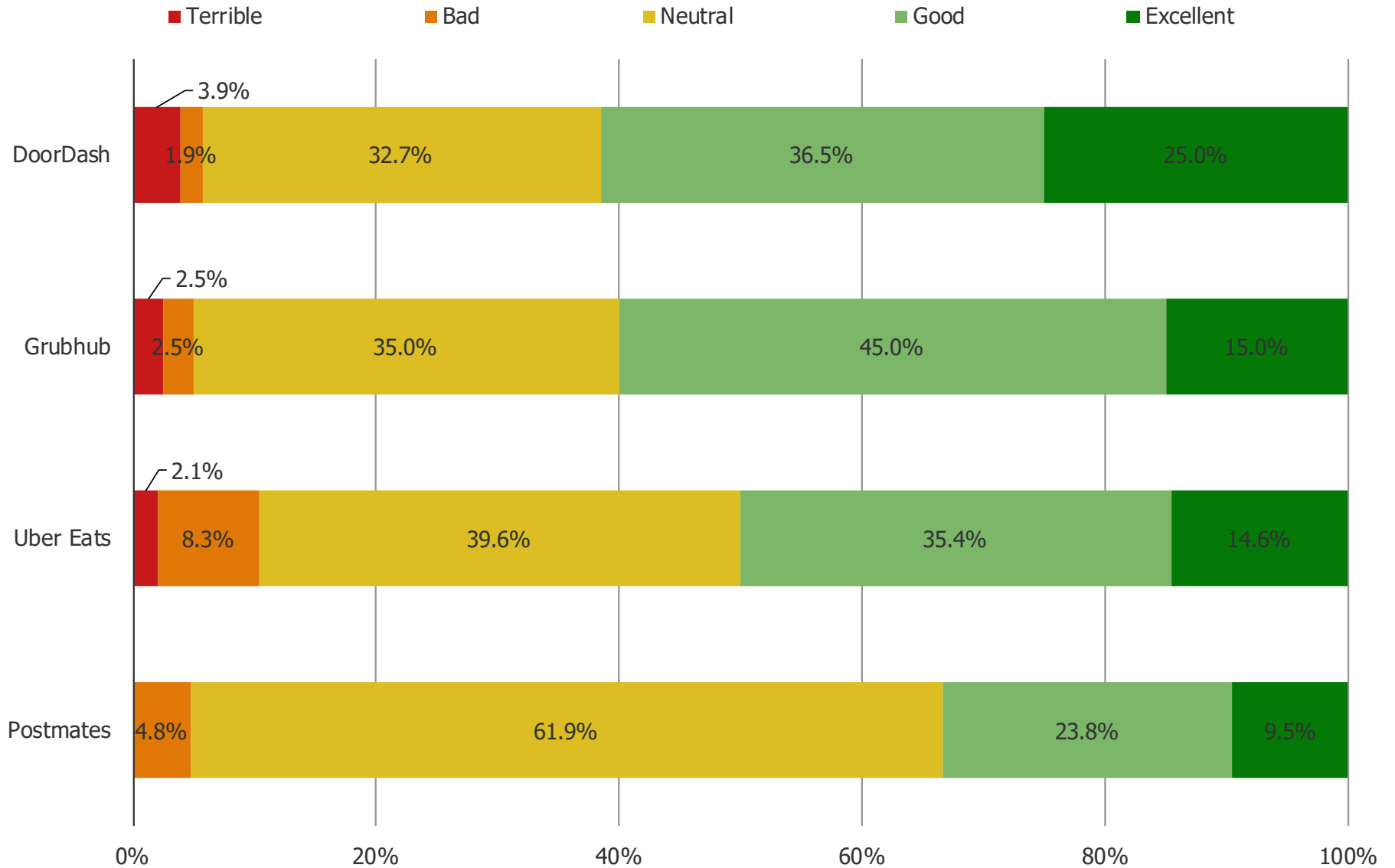
Would you be willing to pay the food delivery service provider for prominent placement within the app

Posed to respondents who are available on the following third-party food delivery apps.



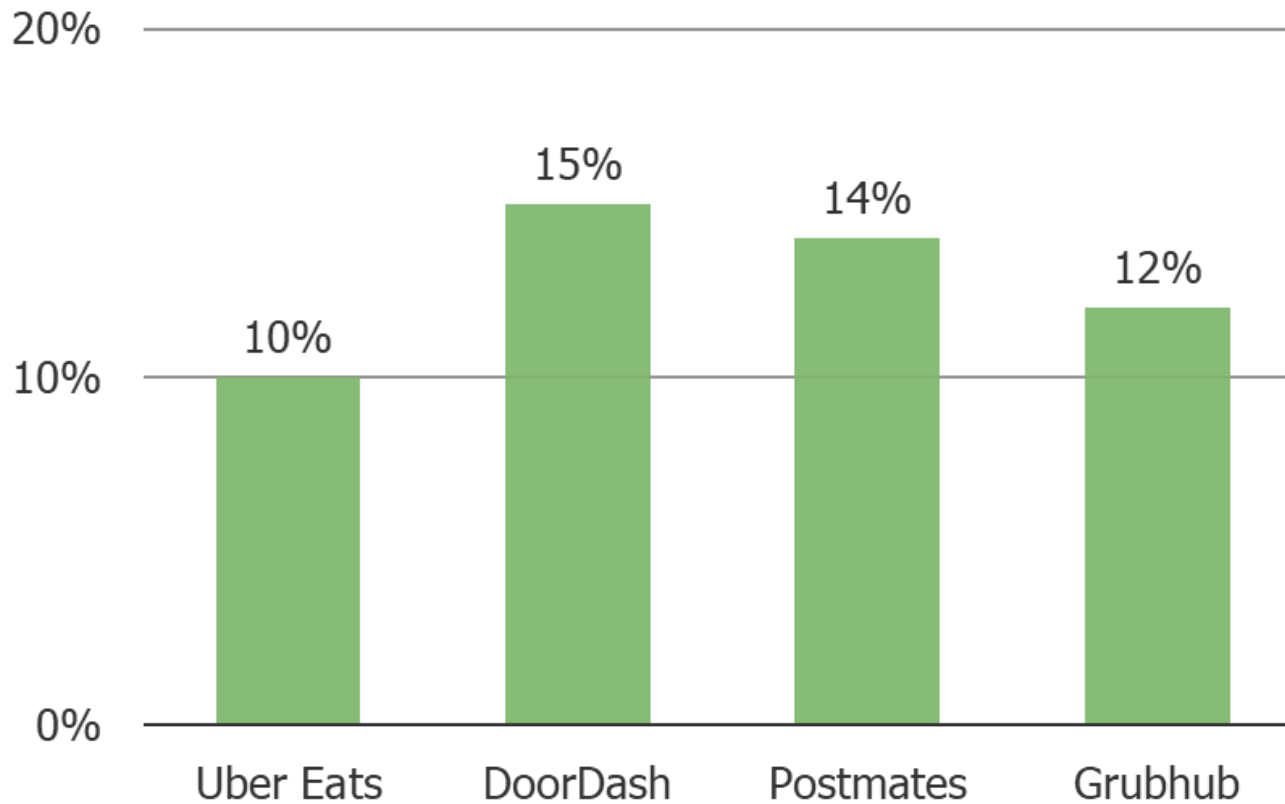
Customer feedback with this food delivery partner is...

Posed to respondents who are available on the following third-party food delivery apps.



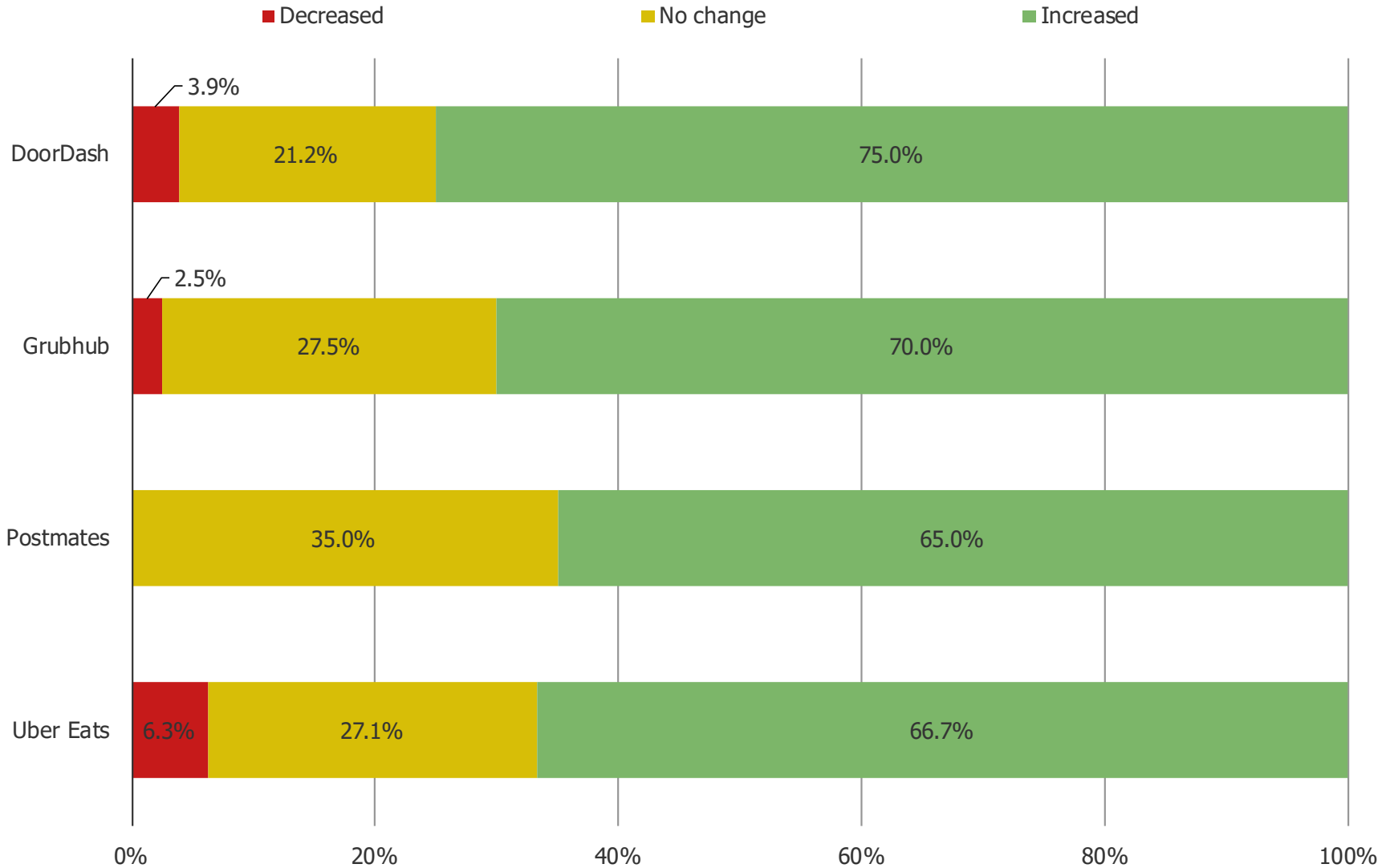
**What are the total fees you pay to this partner as a percentage of gross food sales?
(Fill-in, median %)**

Posed to respondents who are available on the following third-party food delivery apps.



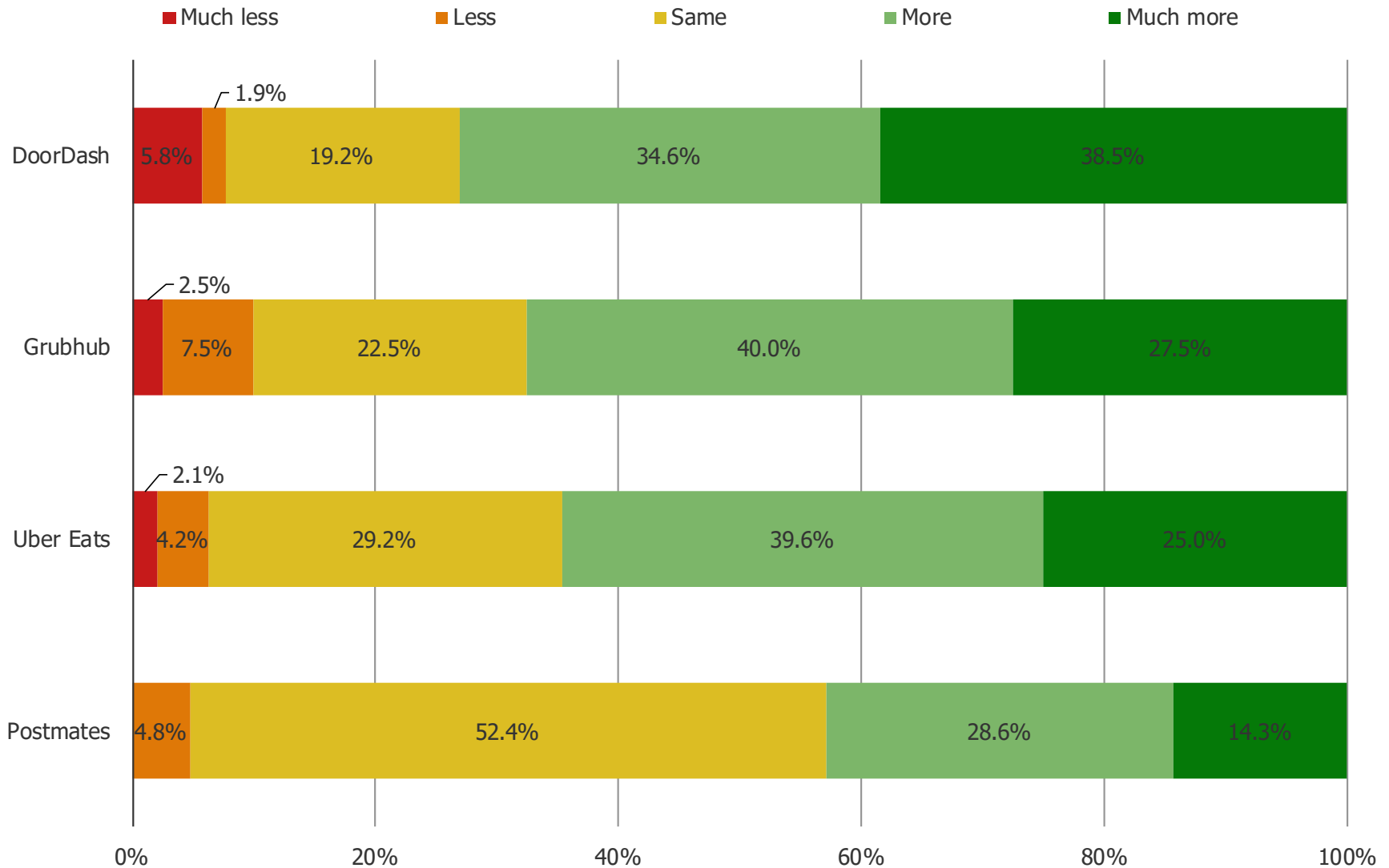
Would you estimate that food delivery sales have increased or decreased with the following over the past year?

Posed to respondents who are available on the following third-party food delivery apps.



Has your reliance on the following increased or decreased because of the coronavirus and social distancing?

Posed to respondents who are available on the following third-party food delivery apps.



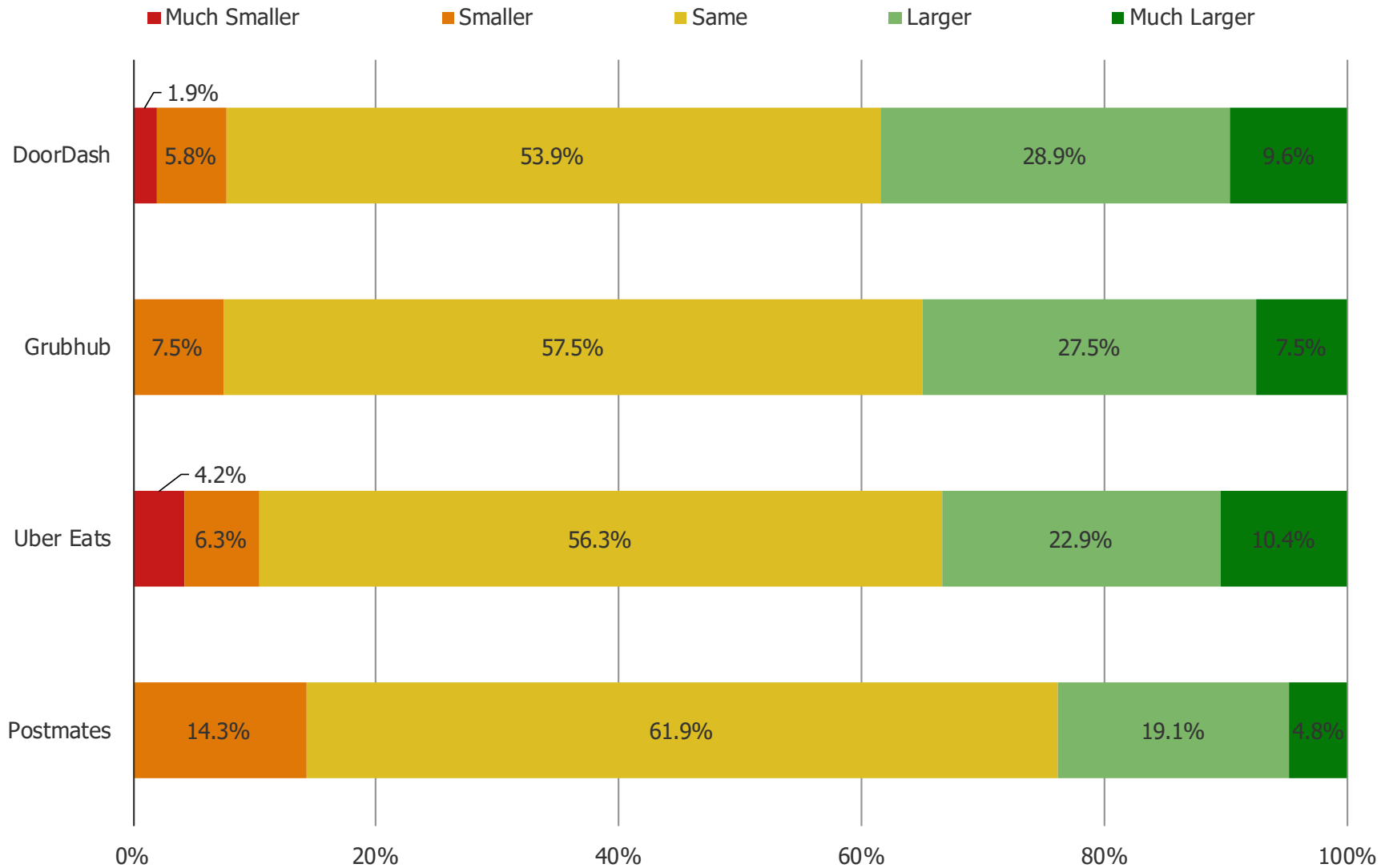
Is the average order size through the following larger or smaller than average dine-in orders?

Posed to respondents who are available on the following third-party food delivery apps.



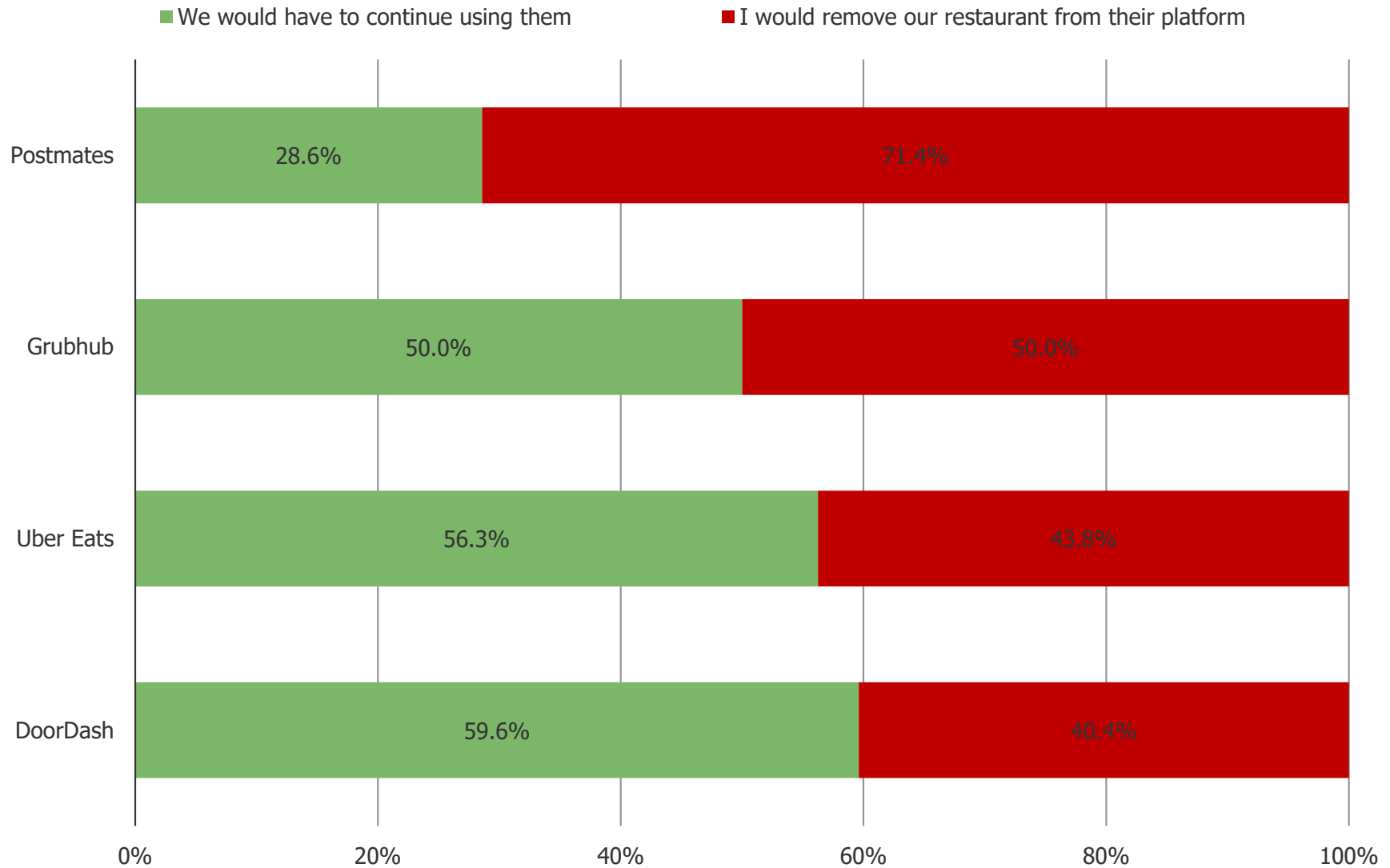
Is the average order size through the following larger or smaller than average take-out orders directly through the restaurant?

Posed to respondents who are available on the following third-party food delivery apps.



What would you do if the following increased their fees/take rates that your restaurant has to pay to use them?

Posed to respondents who are available on the following third-party food delivery apps.



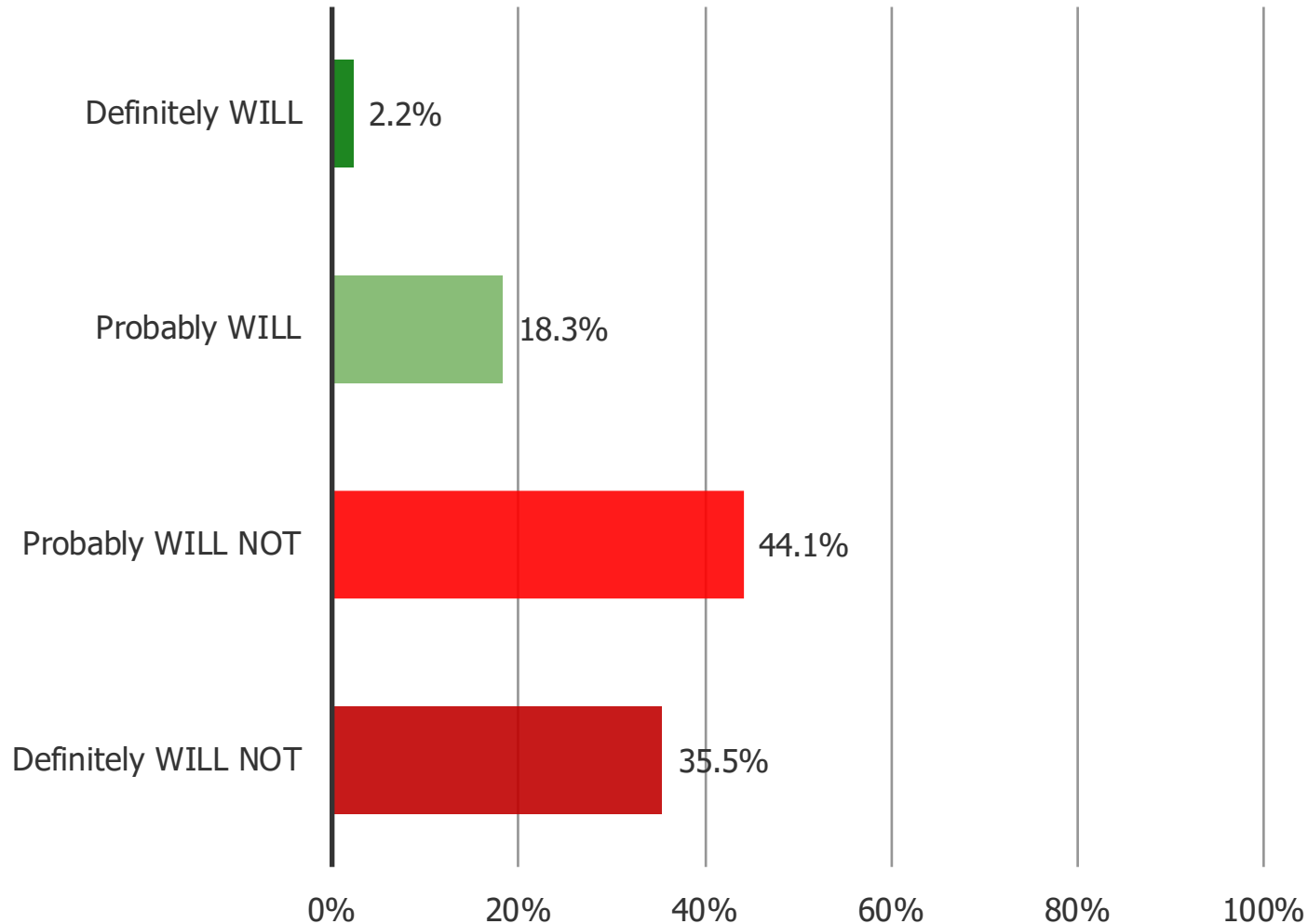
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How likely are you to partner with a third-party food delivery app in 2020?

Posed to respondents who are NOT available on third-party food delivery apps.

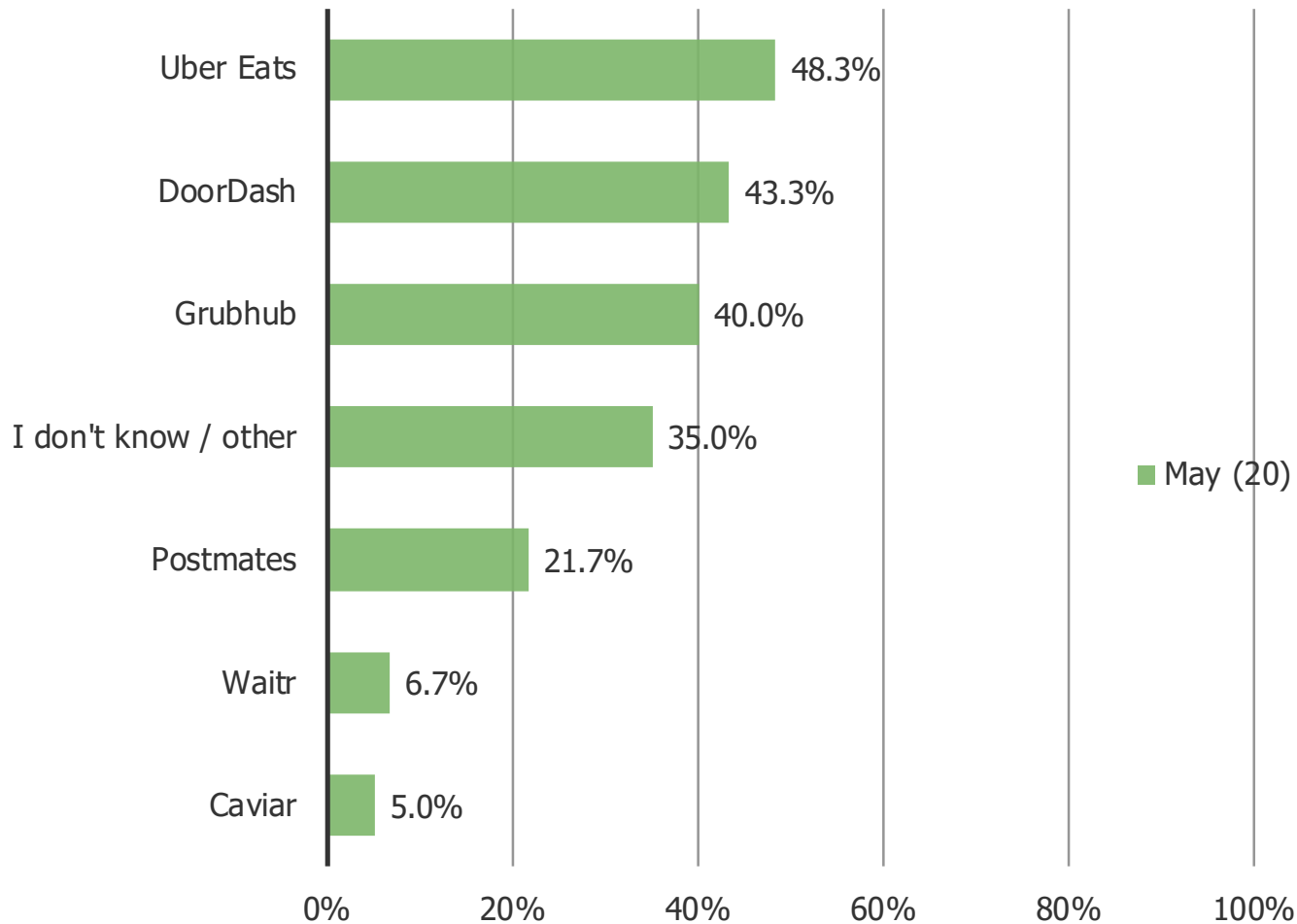


n=93



If you were to partner with a third-party food delivery app, which would you be likely to try out (select ALL that apply)

Posed to respondents who are NOT available on third-party food delivery apps and who are at least somewhat likely to partner with one in 2020.



n=60



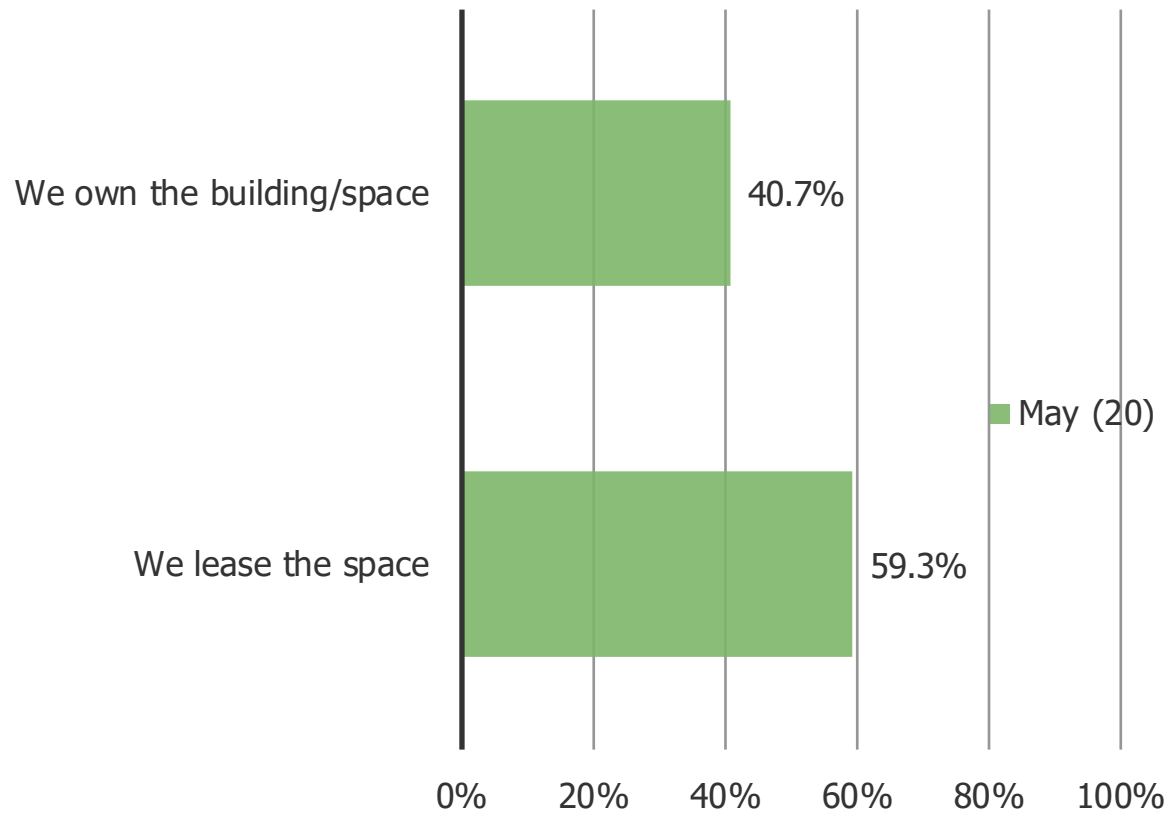
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Do you / the restaurant own or lease the space for your restaurant?

Posed to respondents who order or maintain kitchen equipment when necessary.

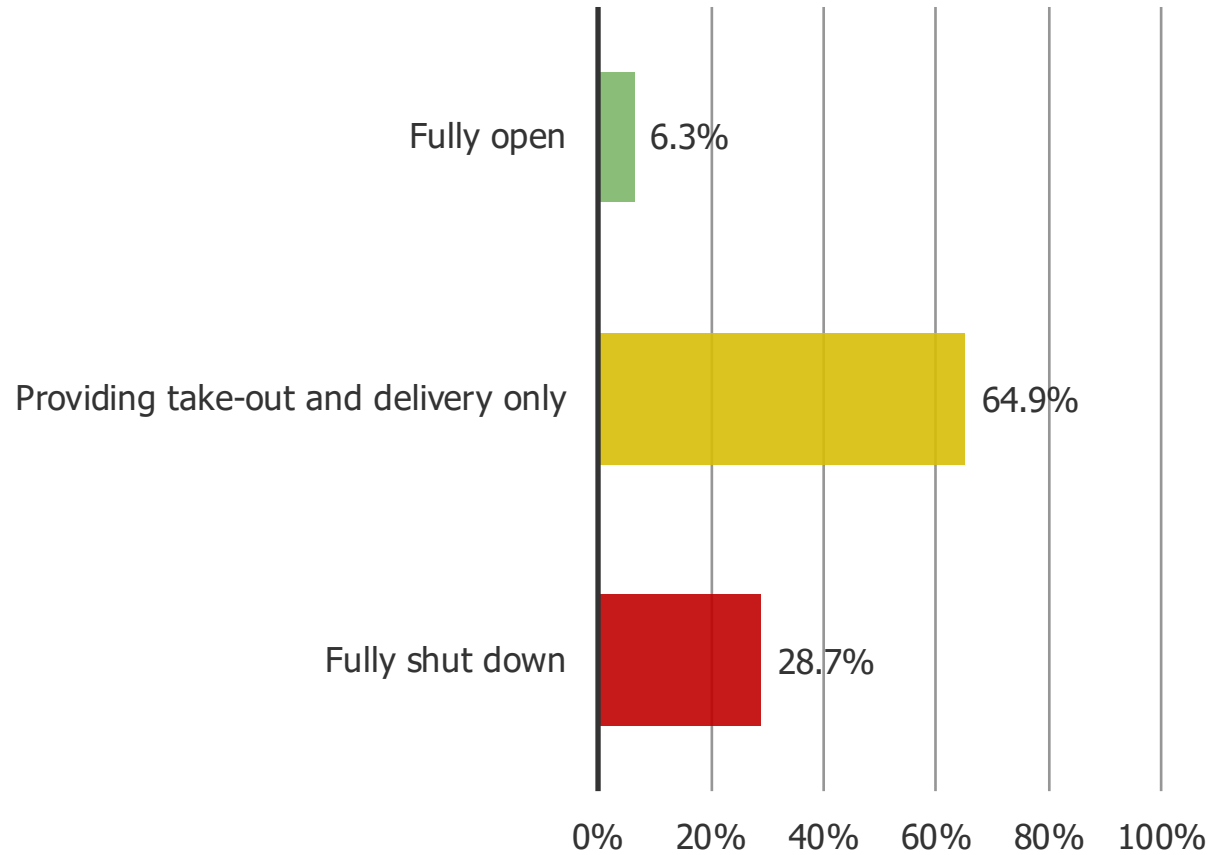


n=135



Which of the following best describes the current status of your restaurant?

Posed to all respondents.

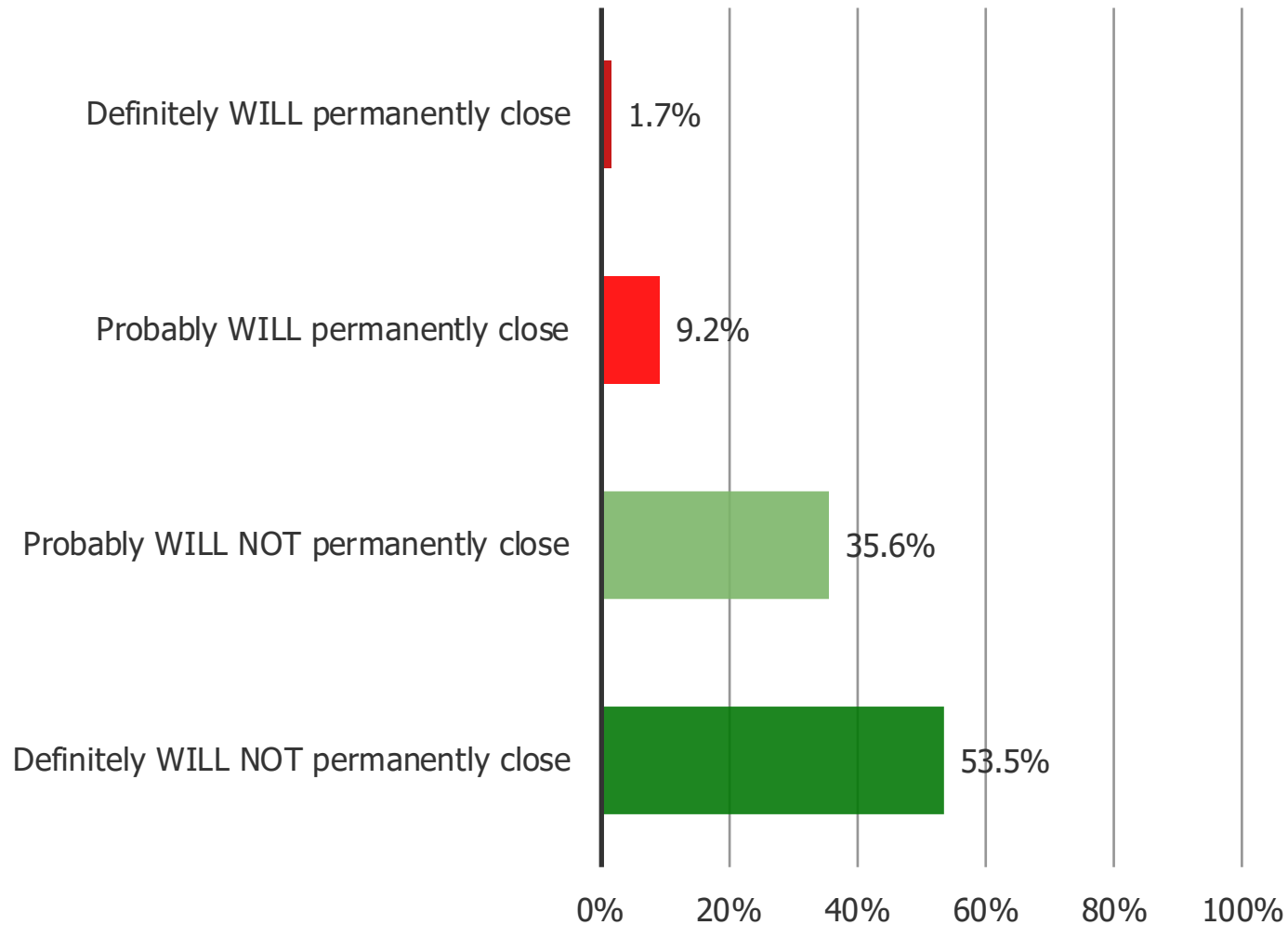


n=174



What are the chances that your restaurant will permanently close at some point in 2020?

Posed to all respondents.

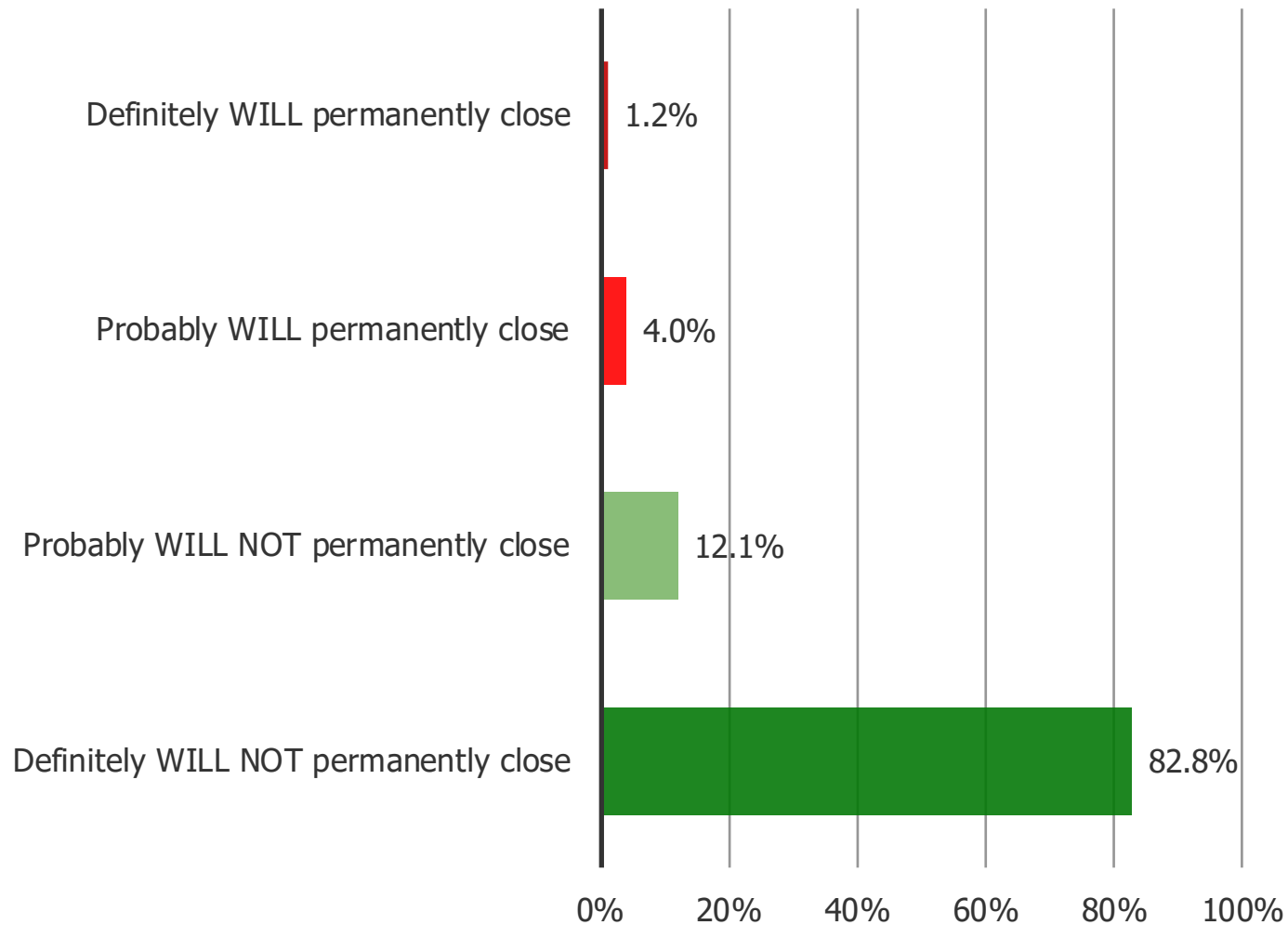


n=174



If we asked you BEFORE coronavirus and social distancing issues arose how likely it would be that your restaurant would close permanently in 2020, what would you have said at that time?

Posed to all respondents.

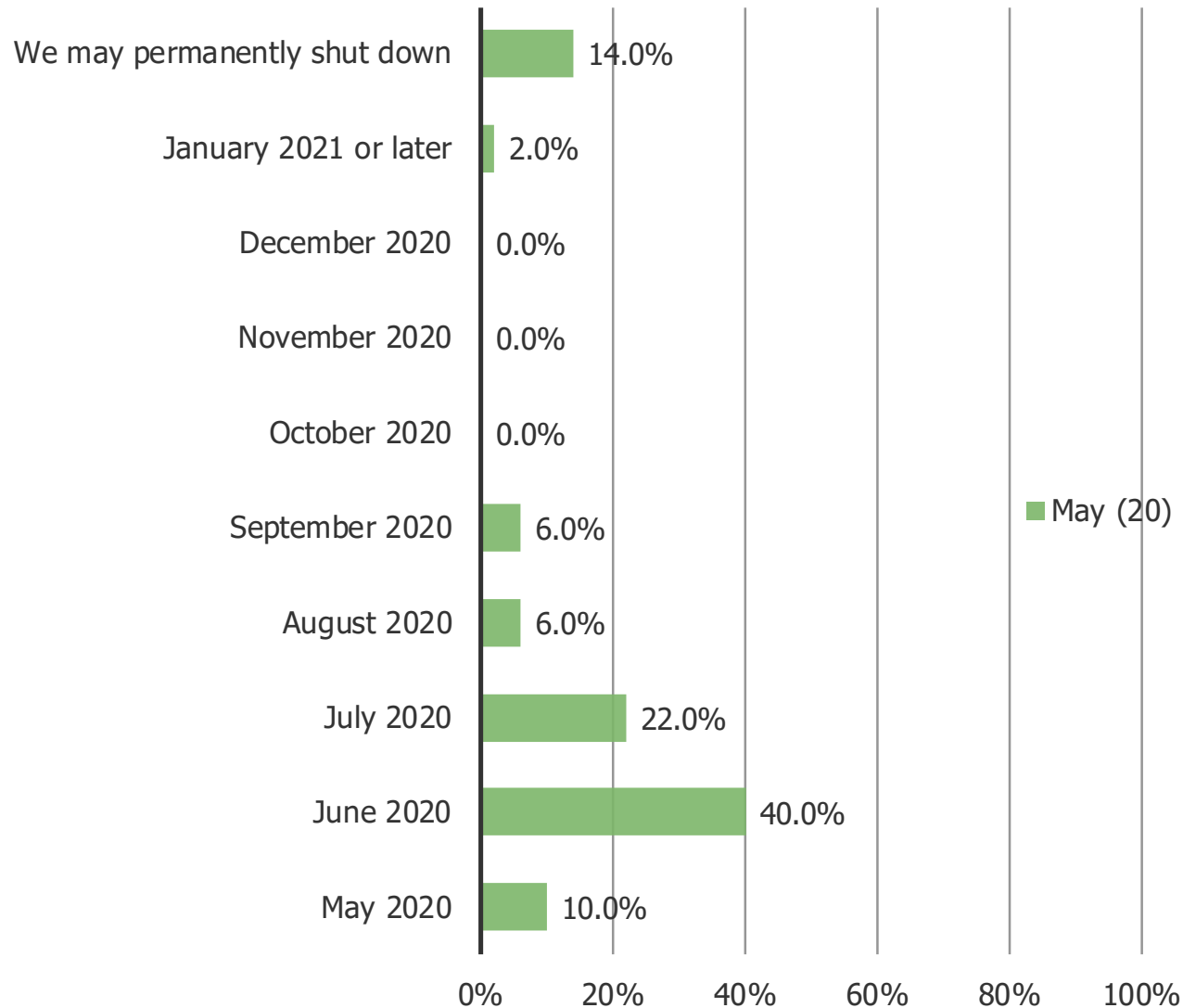


n=174



When do you expect to open your restaurant again?

Posed to respondents whose restaurants are fully shut down.

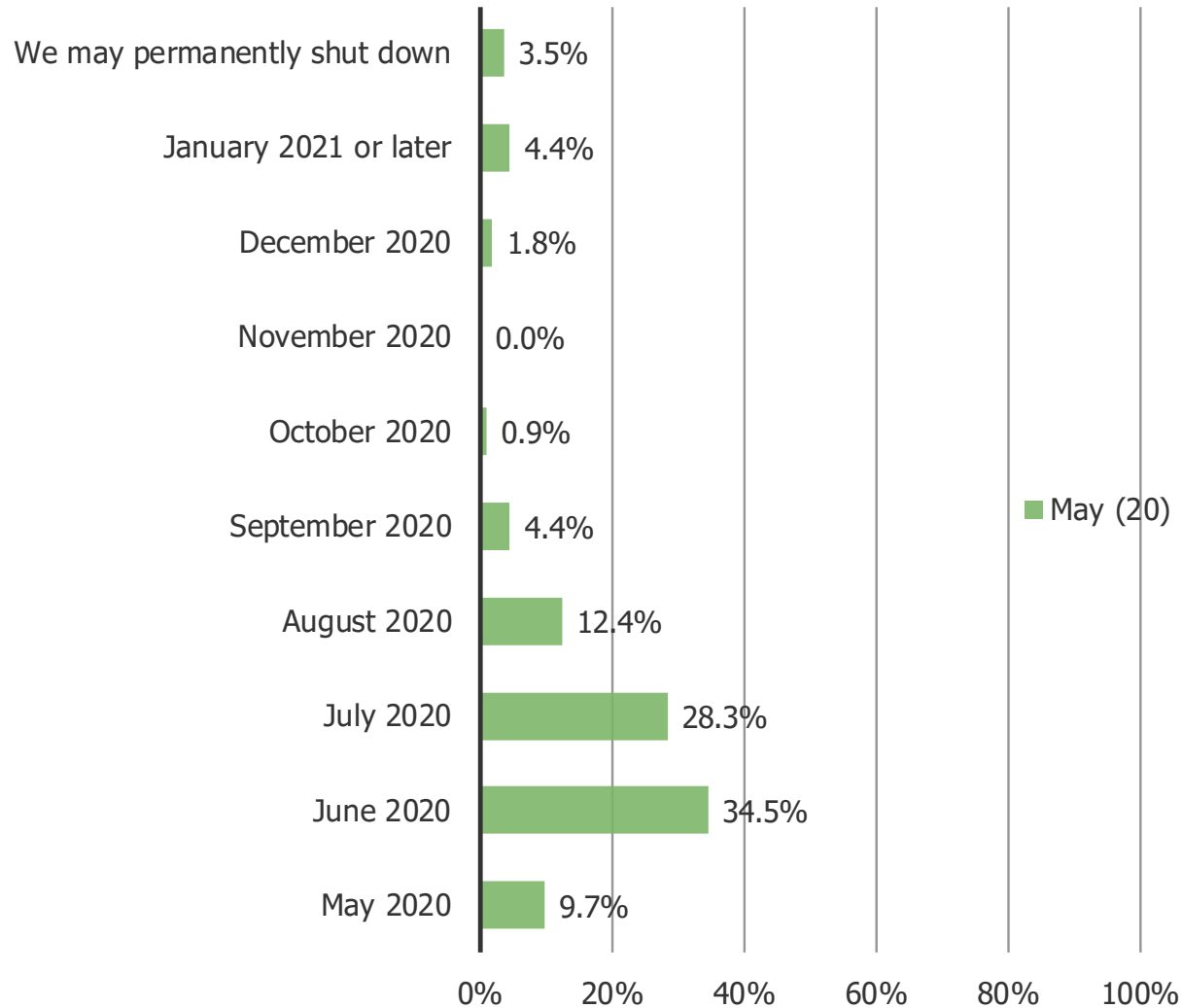


n=50



When do you expect to fully open your restaurant again? (allowing people to dine-in and take out)

Posed to respondents whose restaurants are fully shut down or providing take-out and delivery only

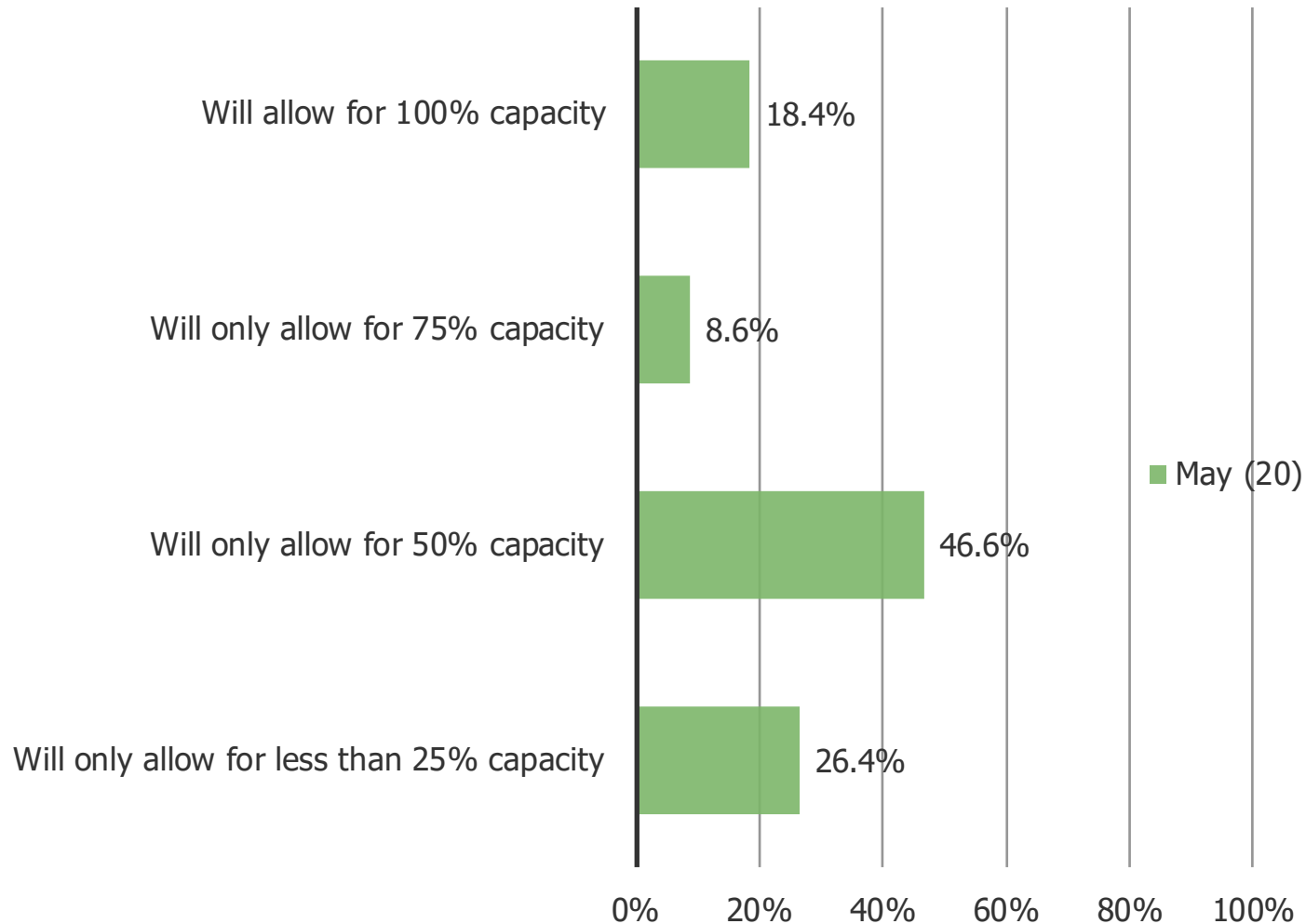


n=113



If you are currently fully open or if not, when you are fully open again, will you only allow a certain percentage of your restaurant to be full at any given time?

Posed to all respondents.

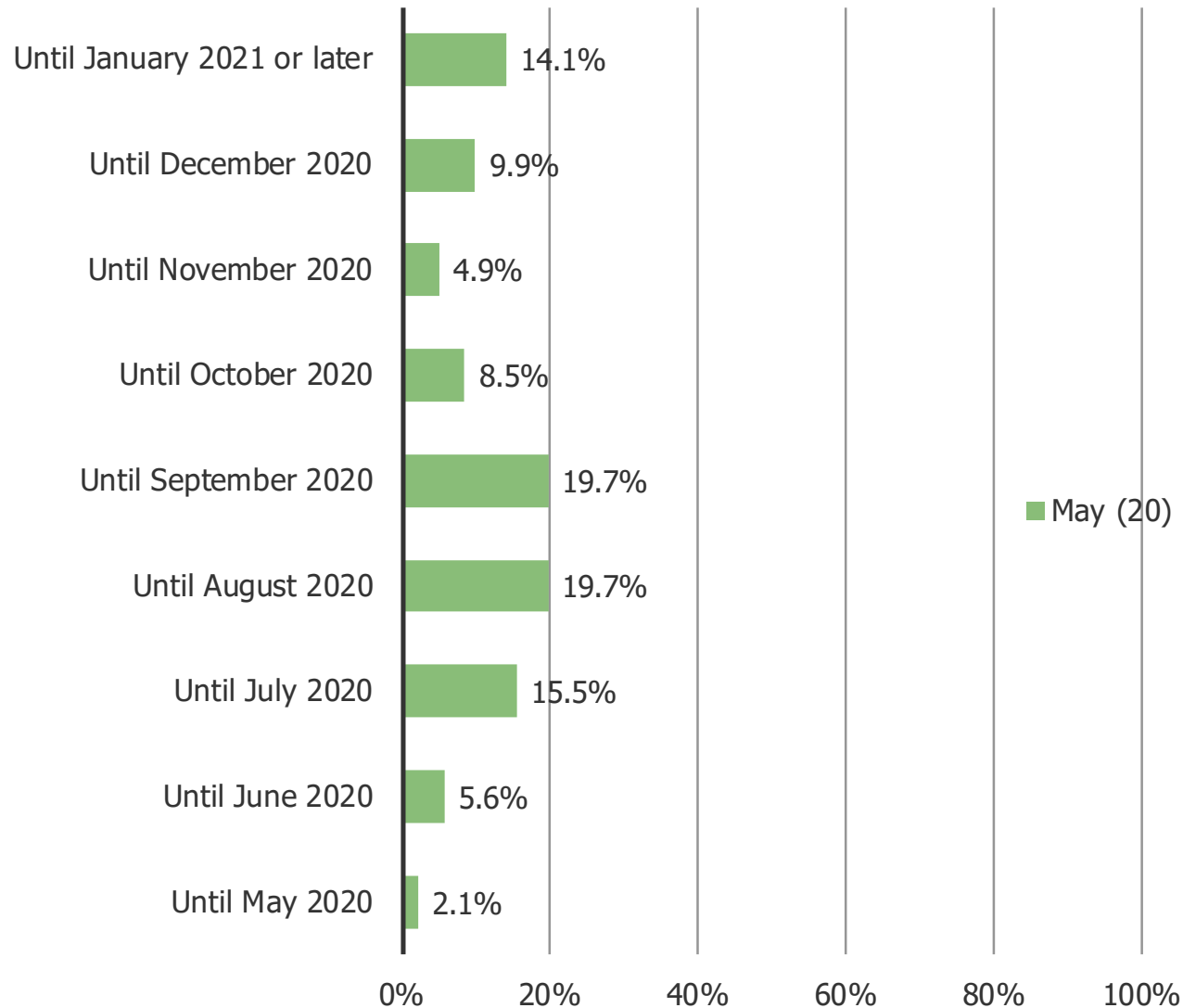


n=174



For how long do you intend to keep the restaurant below full capacity?

Posed to respondents who intend to limit restaurant capacity for a given time when fully open again



n=142



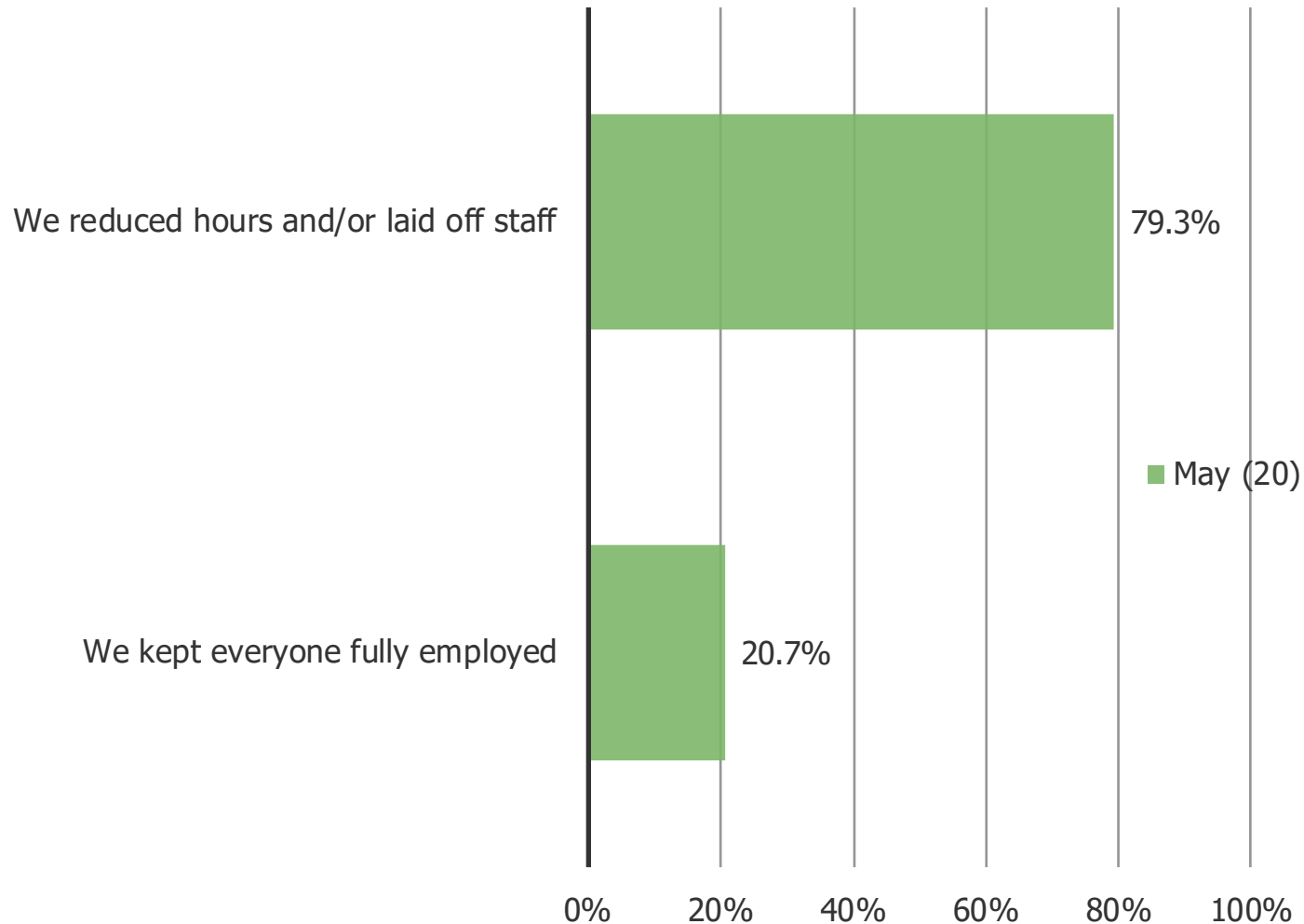
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Which best describes what you have done with your employees in the past two months?

Posed to all respondents.

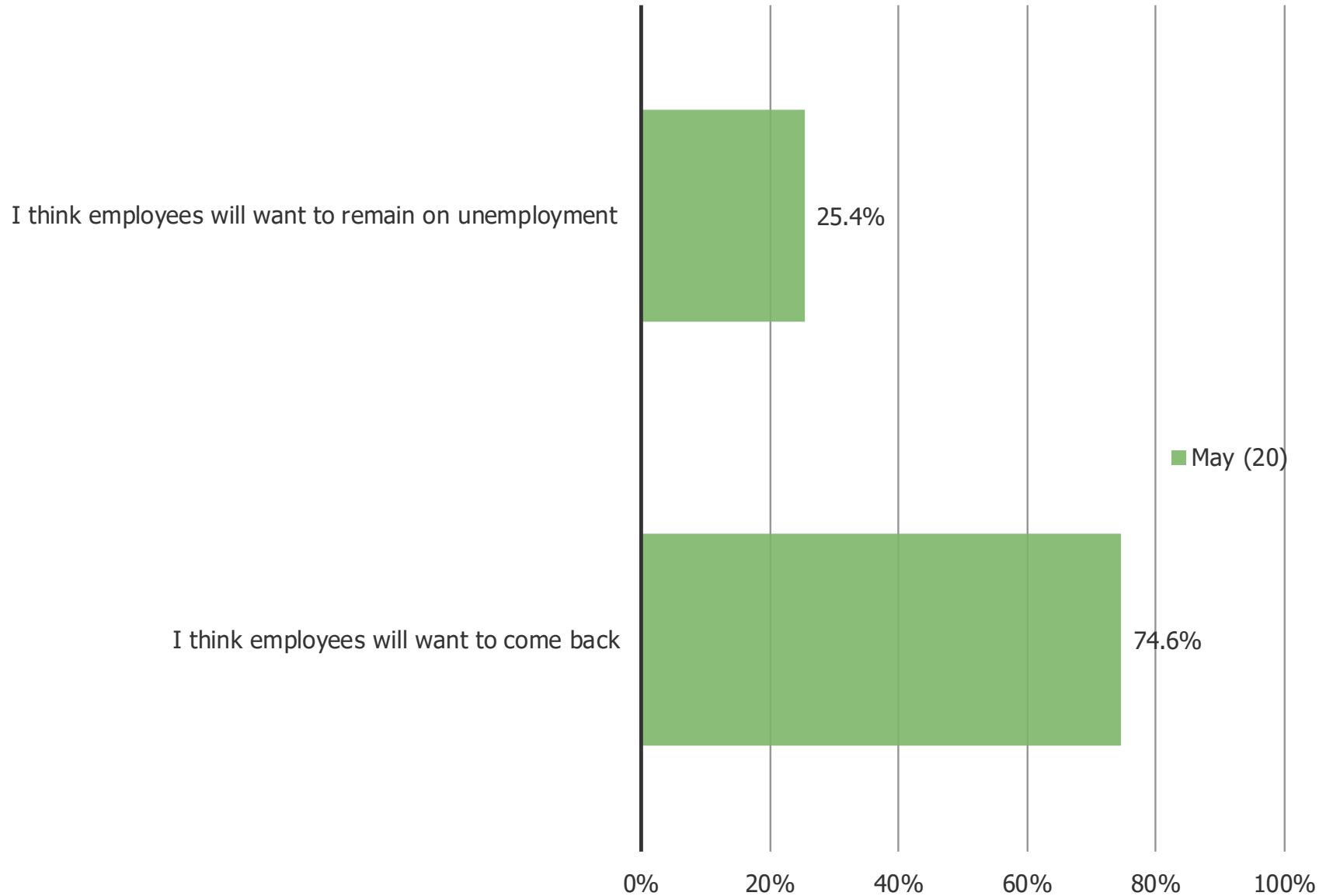


n=174



How difficult / easy do you anticipate it will be to re-hire staff when you need to?

Posed to respondents who reduced hours and/or laid off staff in the past two months.



n=138



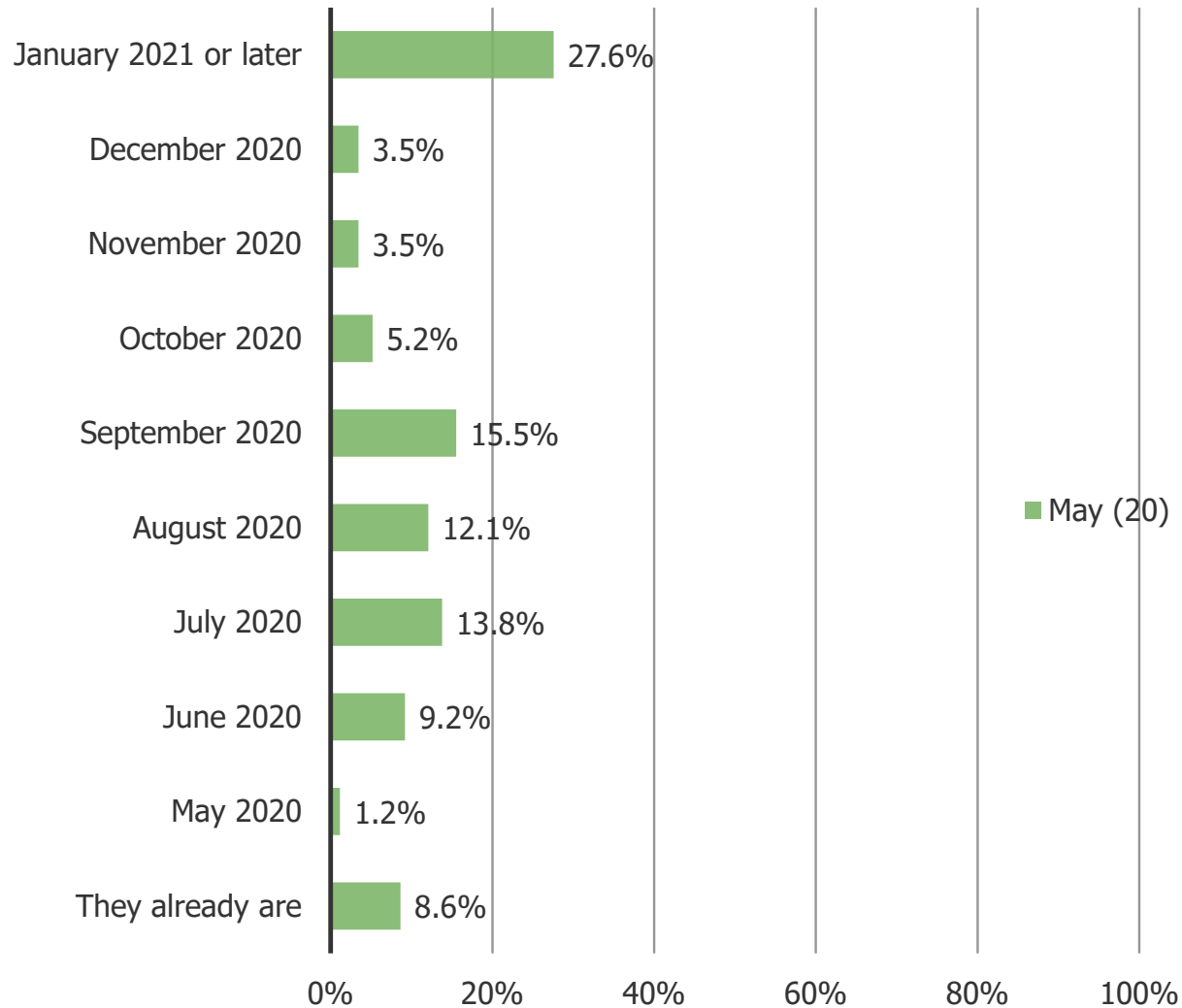
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When do you expect customer traffic in your restaurant to be back to normal levels? (pre-coronavirus)

Posed to all respondents.

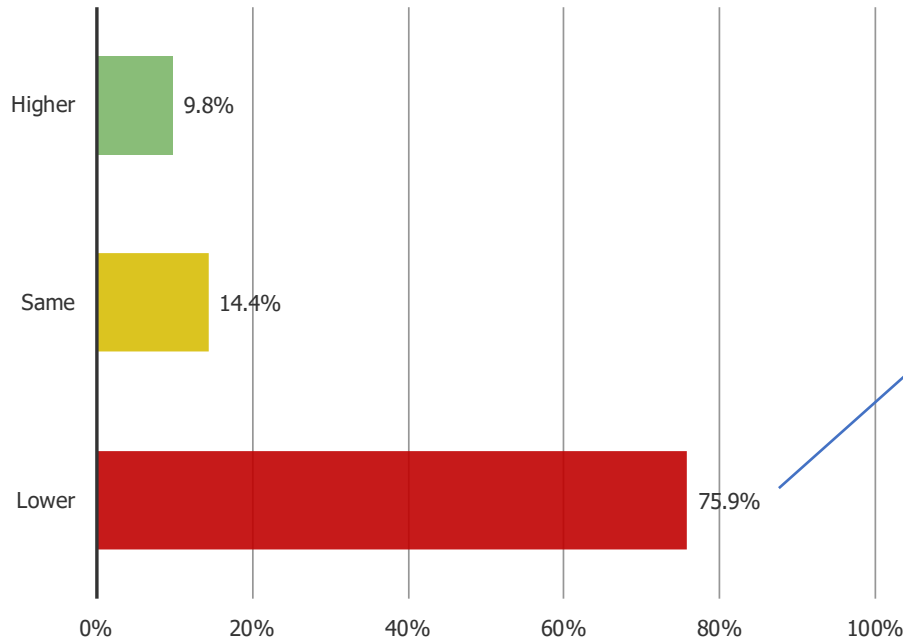


n=174



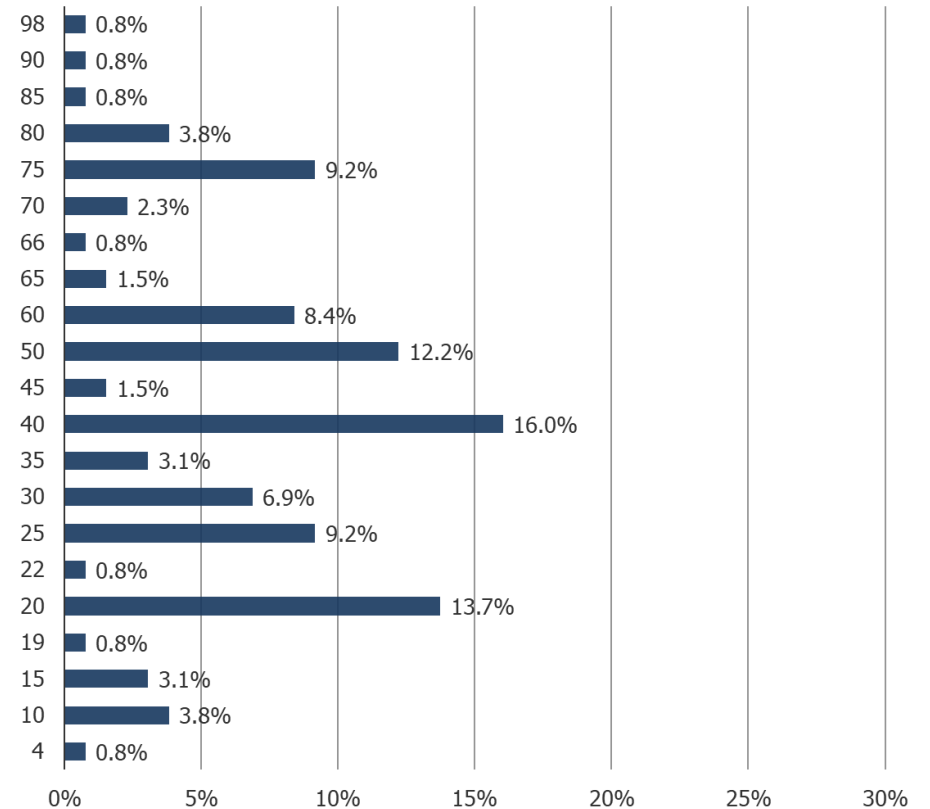
How do you expect revenues to come in for 2020 compared to 2019?

Posed to all respondents.



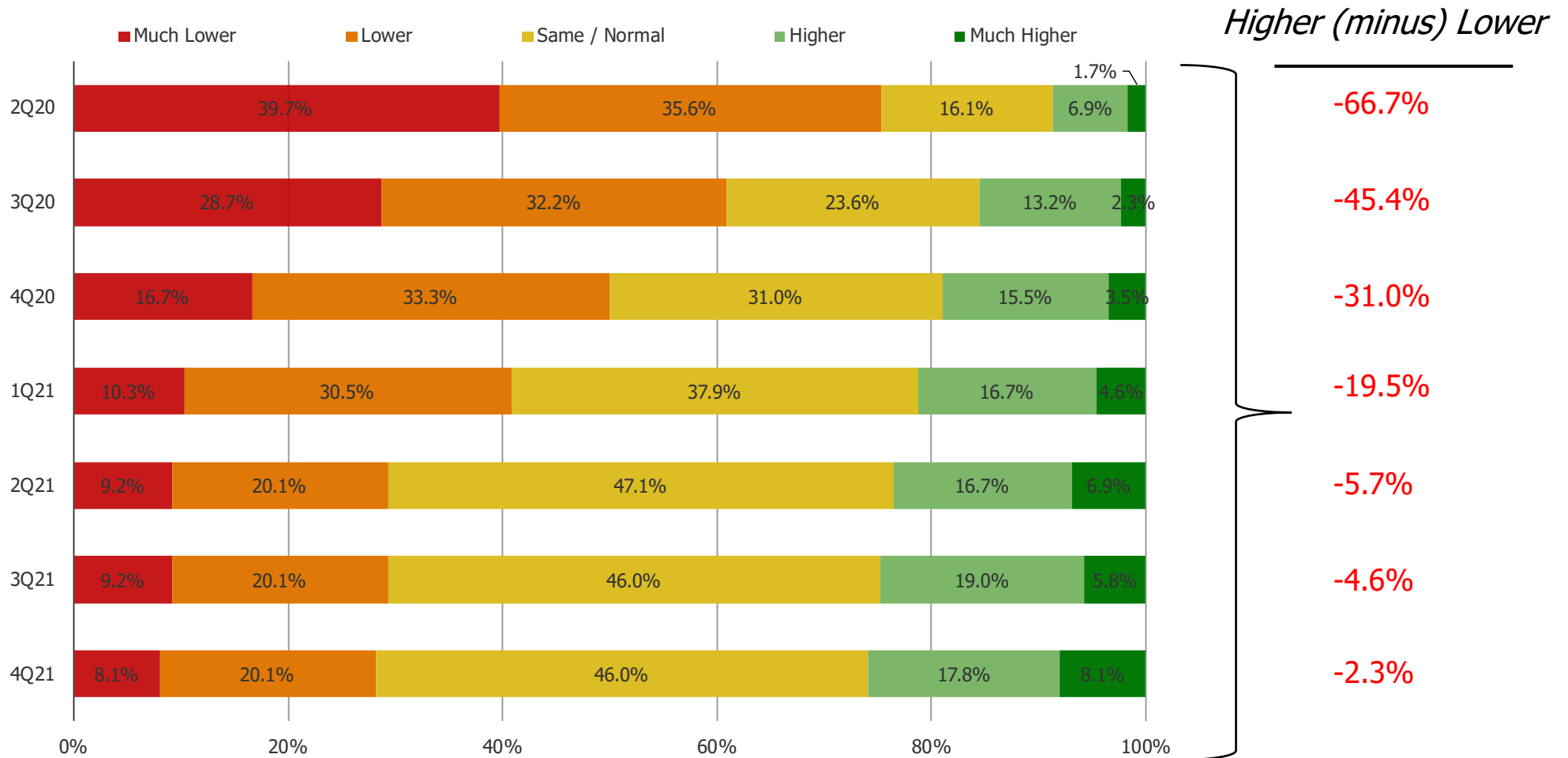
n=174

Percentage Decline (Mean Response = 42.7%)



How do you expect revenue to trend compared to what would be considered normal?

Posed to all respondents.



n=174

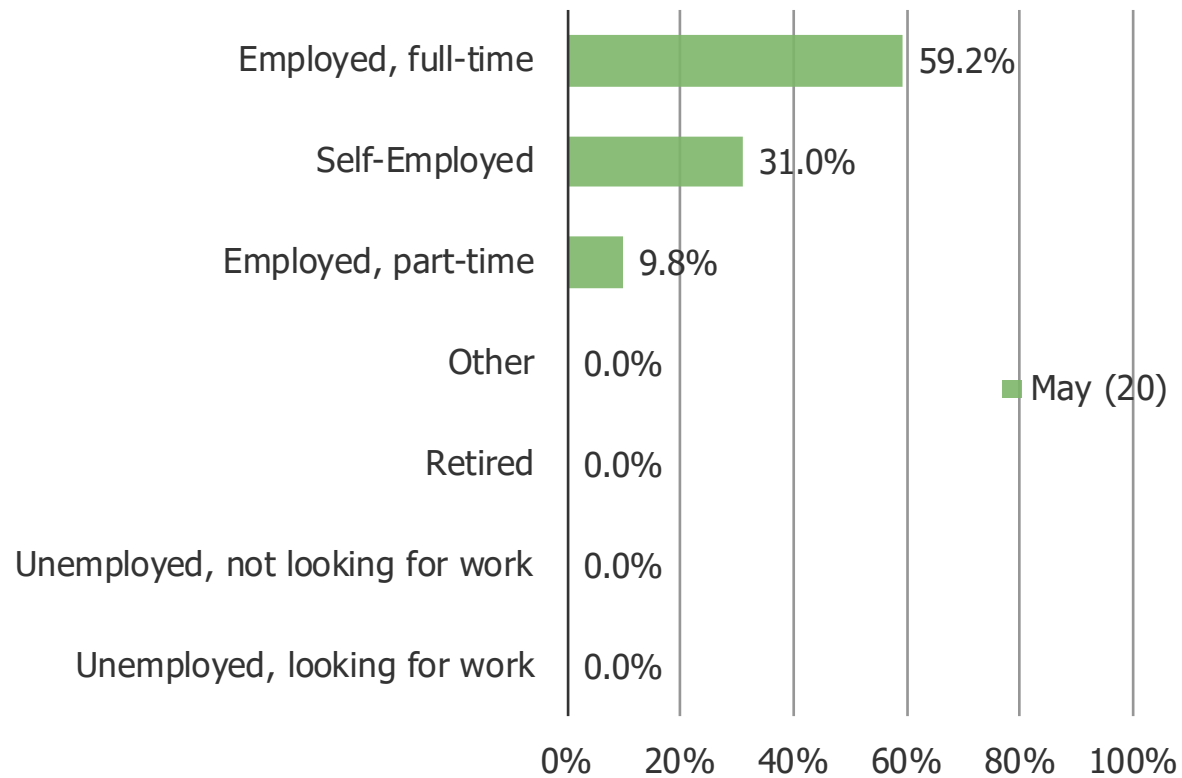


Restaurants and Third-Party Delivery Apps



What is your current employment status?

Posed to all respondents.

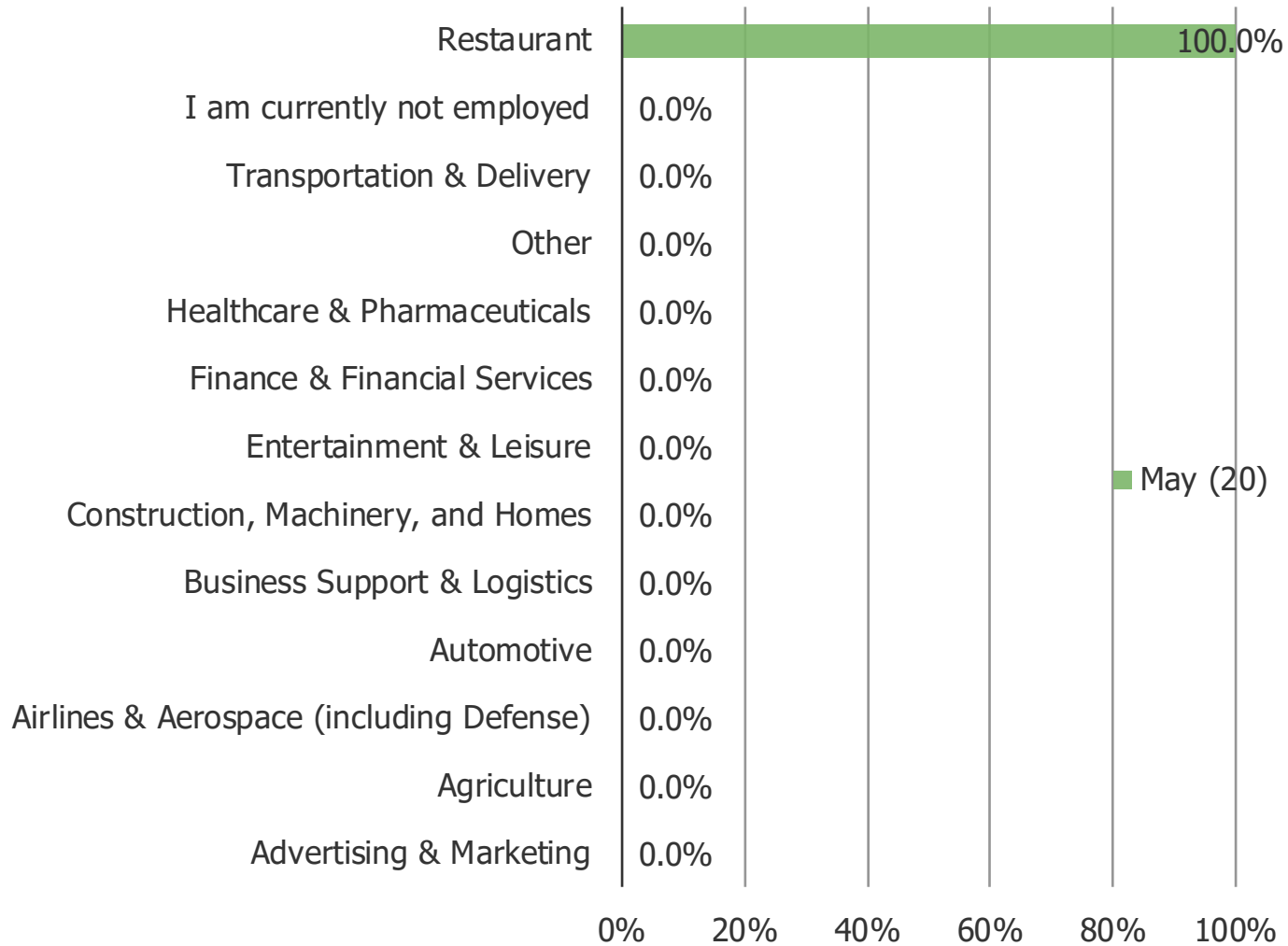


n=174



Which of the following best describes the principal industry of your organization?

Posed to all respondents.

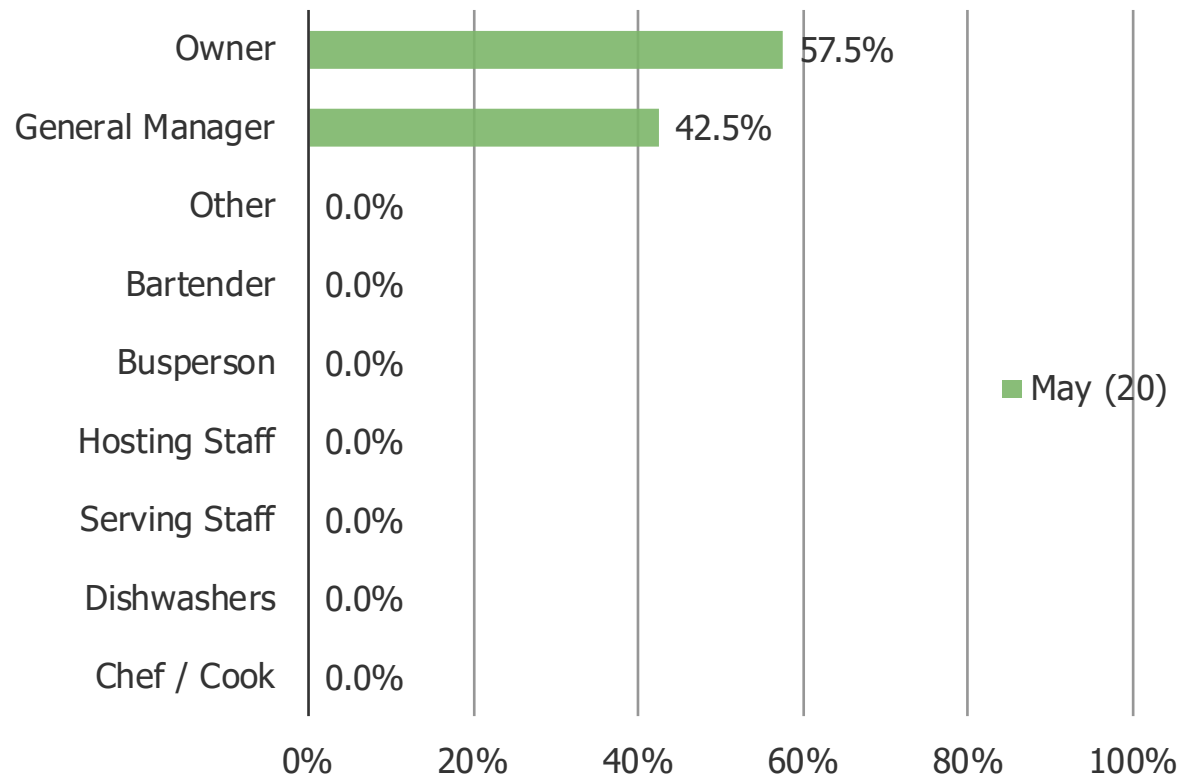


n=174



What is your job title/function?

Posed to all respondents.

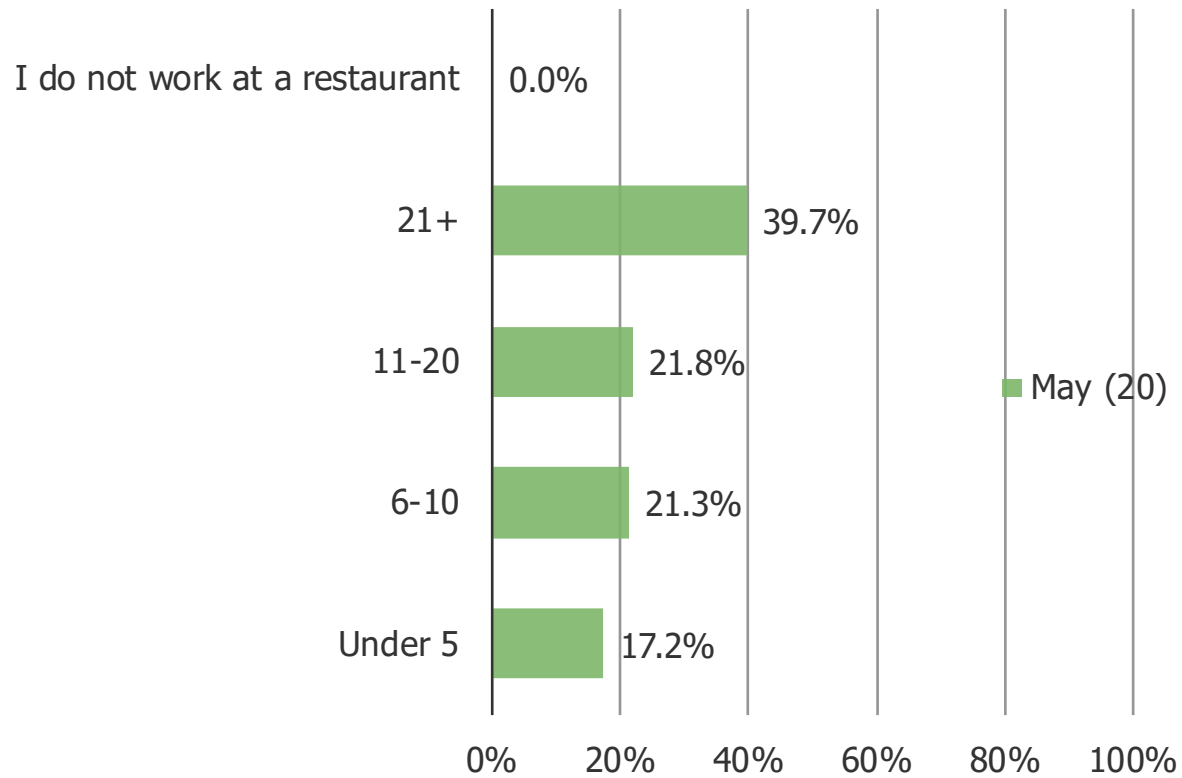


n=174



How many employees does your restaurant employ?

Posed to all respondents.

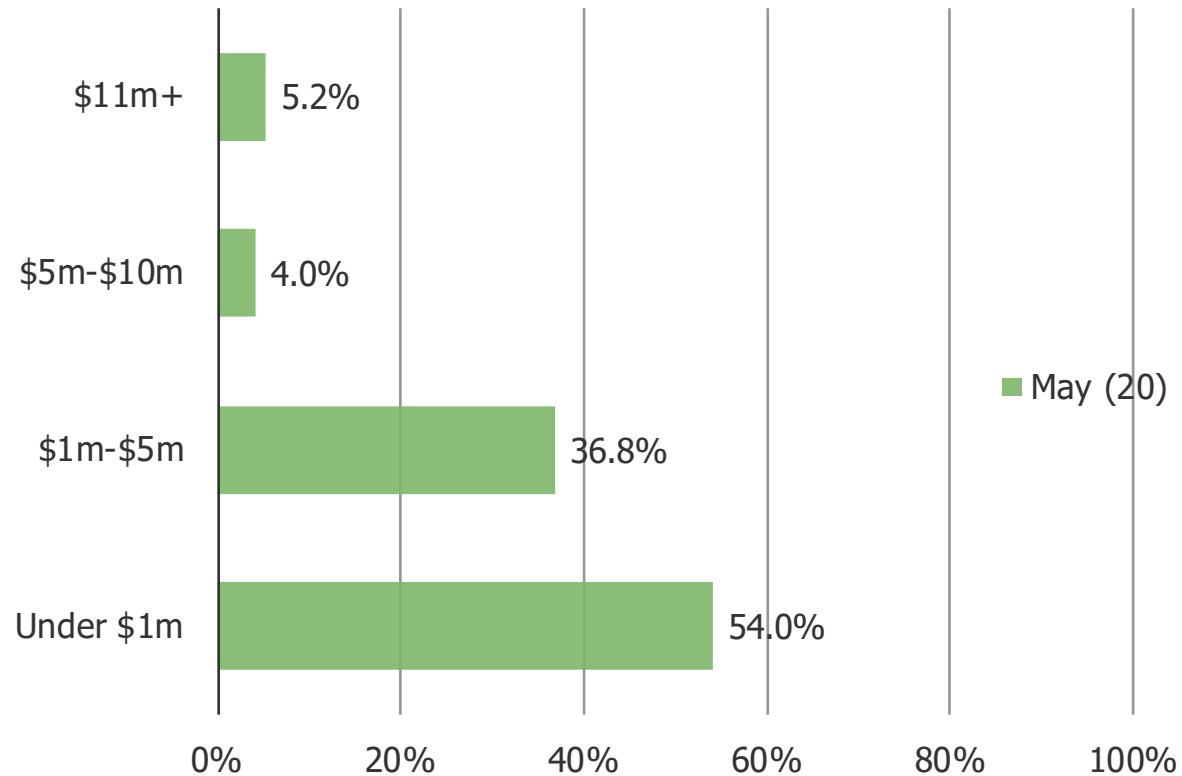


n=174



Approximately how large is your restaurant in terms of annual revenue?

Posed to all respondents.

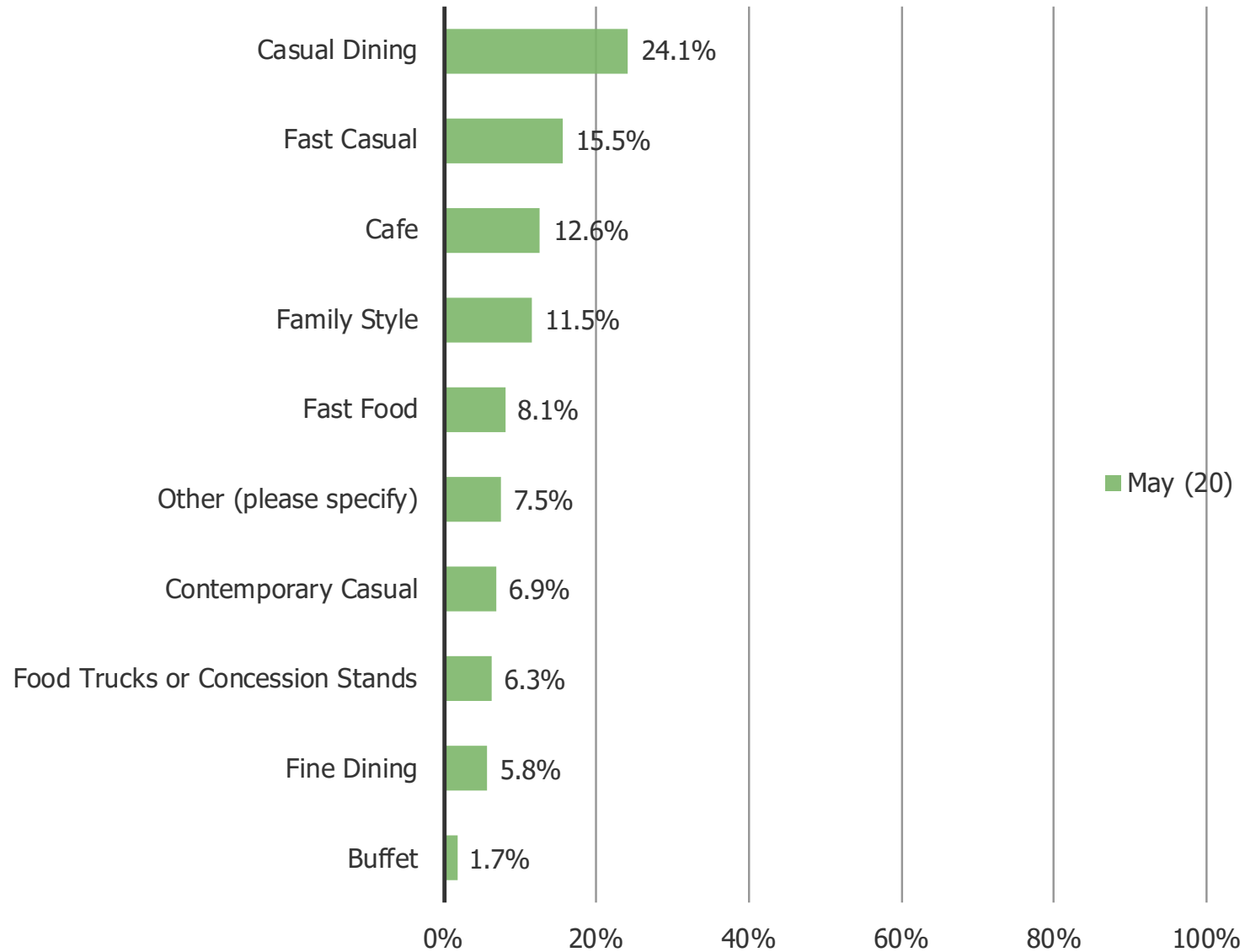


n=174



Which of the following best characterizes your restaurant?

Posed to all respondents.



n=174

