

**CHECK BREAKDOWN:****FOOD DELIVERY USAGE: SLIGHTLY SOFTER COMPARED TO SERIES HIGHS**

Food delivery app usage has increased considerably over time, but in recent months/quarters usage frequency has softened relative to series highs. Sentiment among users is positive for all platforms, but we would note that self-assessed % of delivery/takeaways orders that users of each app make through that app declined q/q.

**ADOPTION DYNAMICS**

Adoption curves accelerated during the pandemic across age cohorts, but hit a bit of a wall in the second half of 2021. Most age cohorts have increased adoption over time, but 25-34 and 35-44 year olds in particular have taken to food delivery apps. Respondents who are employed and work from home are considerably more engaged with food delivery apps compared to those who are employed and DO NOT work from home. When it comes to income – the higher the income band, the more frequently respondents use food delivery apps.

**DOORDASH GAINING SHARE**

DoorDash remains the share leader and has expanded the share gap between itself and Uber Eats over the past two quarters. Noteworthy insight: the % of Uber Eats users who also use DoorDash has increased over time, but the % of DoorDash users who also use Uber Eats has been flat overall and down over the past two quarters.

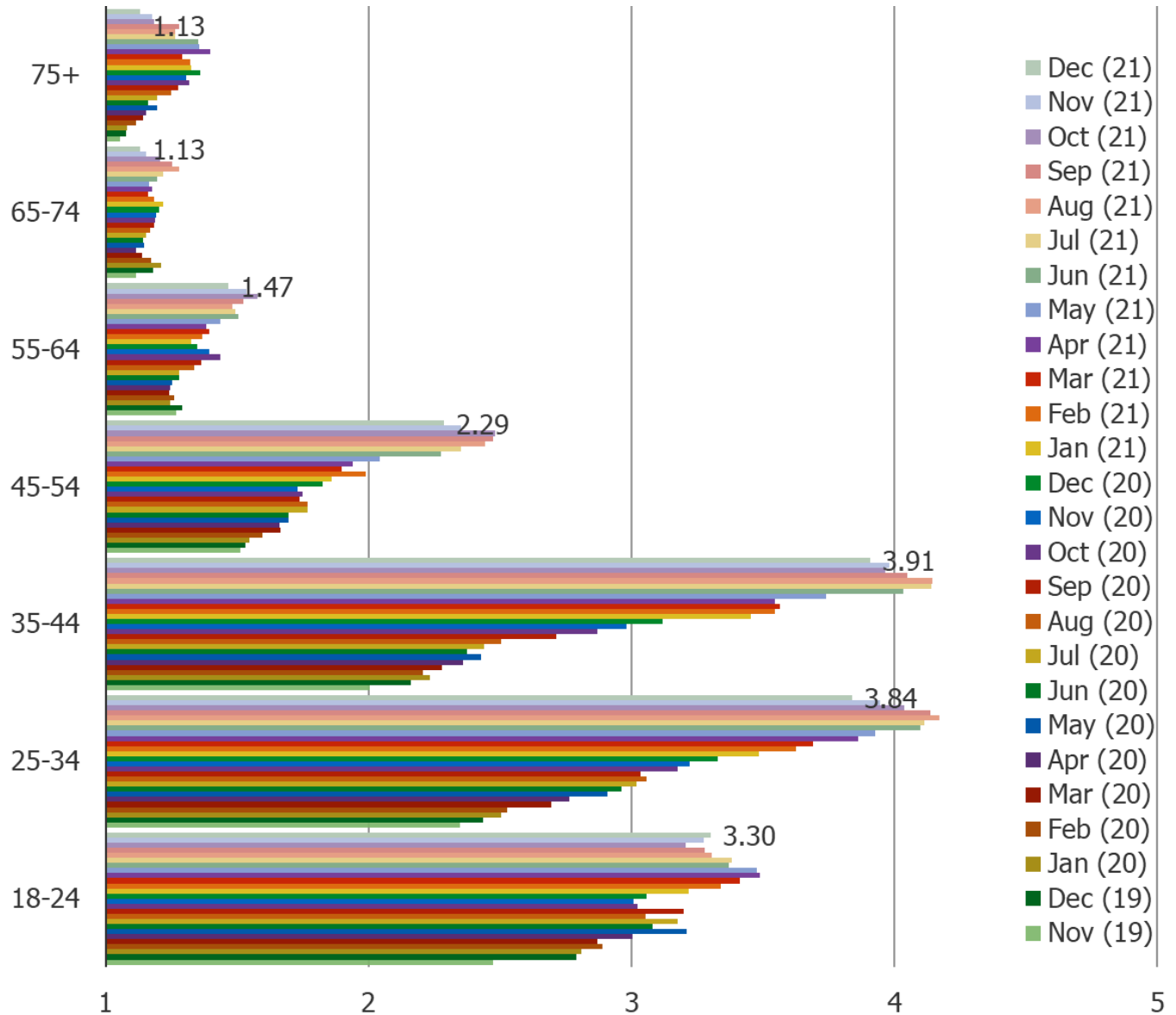
## ADOPTION CURVES: BY AGE AND WFH

Food Delivery Apps

Audience: 1,000 US Consumers

Date: January 2022

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



Weighted Average Calculation:

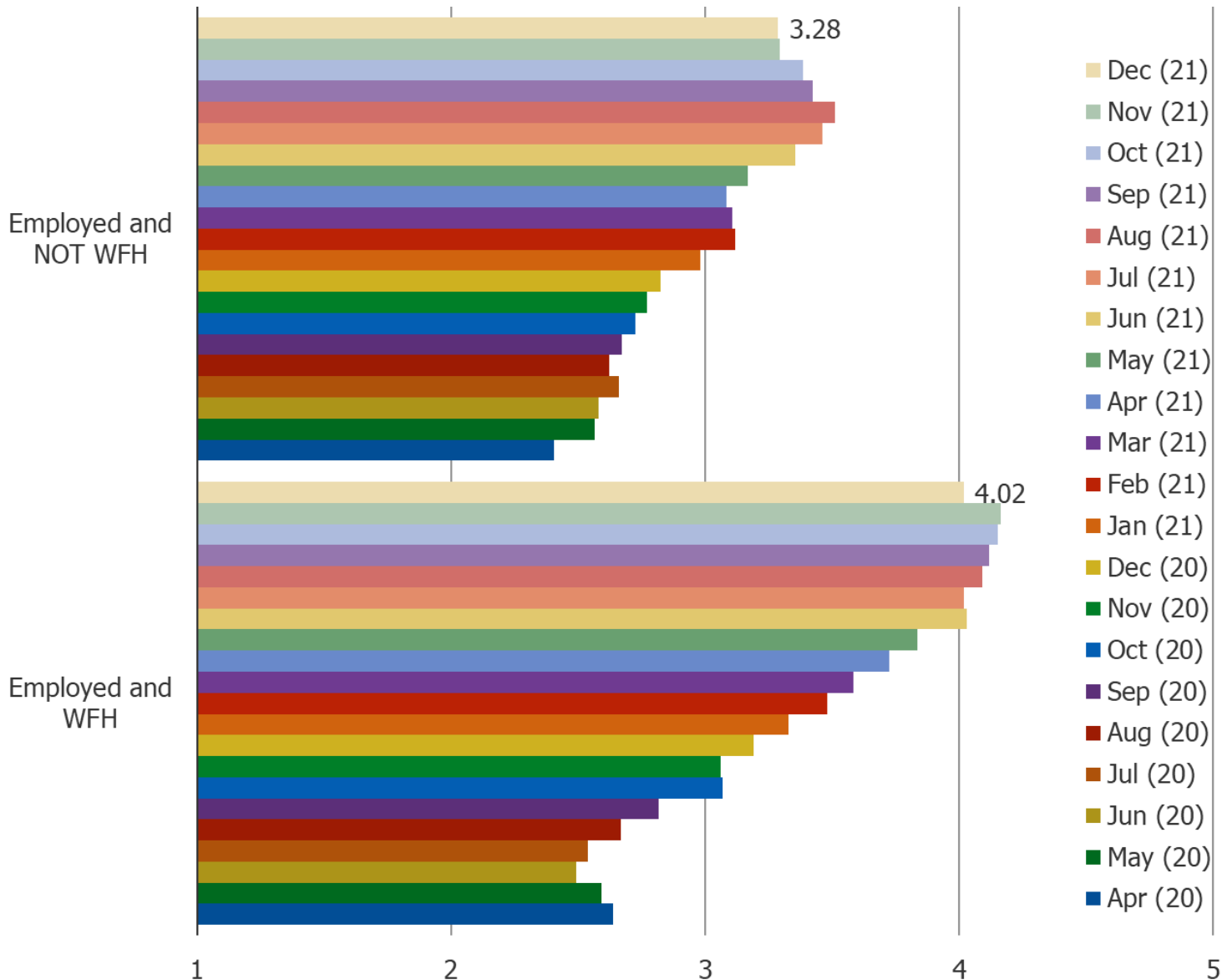
- 1 = Never
- 2 = Less than once per month
- 3 = Once or twice a month
- 4 = Around once a week
- 5 = Multiple times per week
- 6 = Around once a day
- 7 = Multiple times per day

Food Delivery Apps

Audience: 1,000 US Consumers

Date: January 2022

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



Weighted Average Calculation:

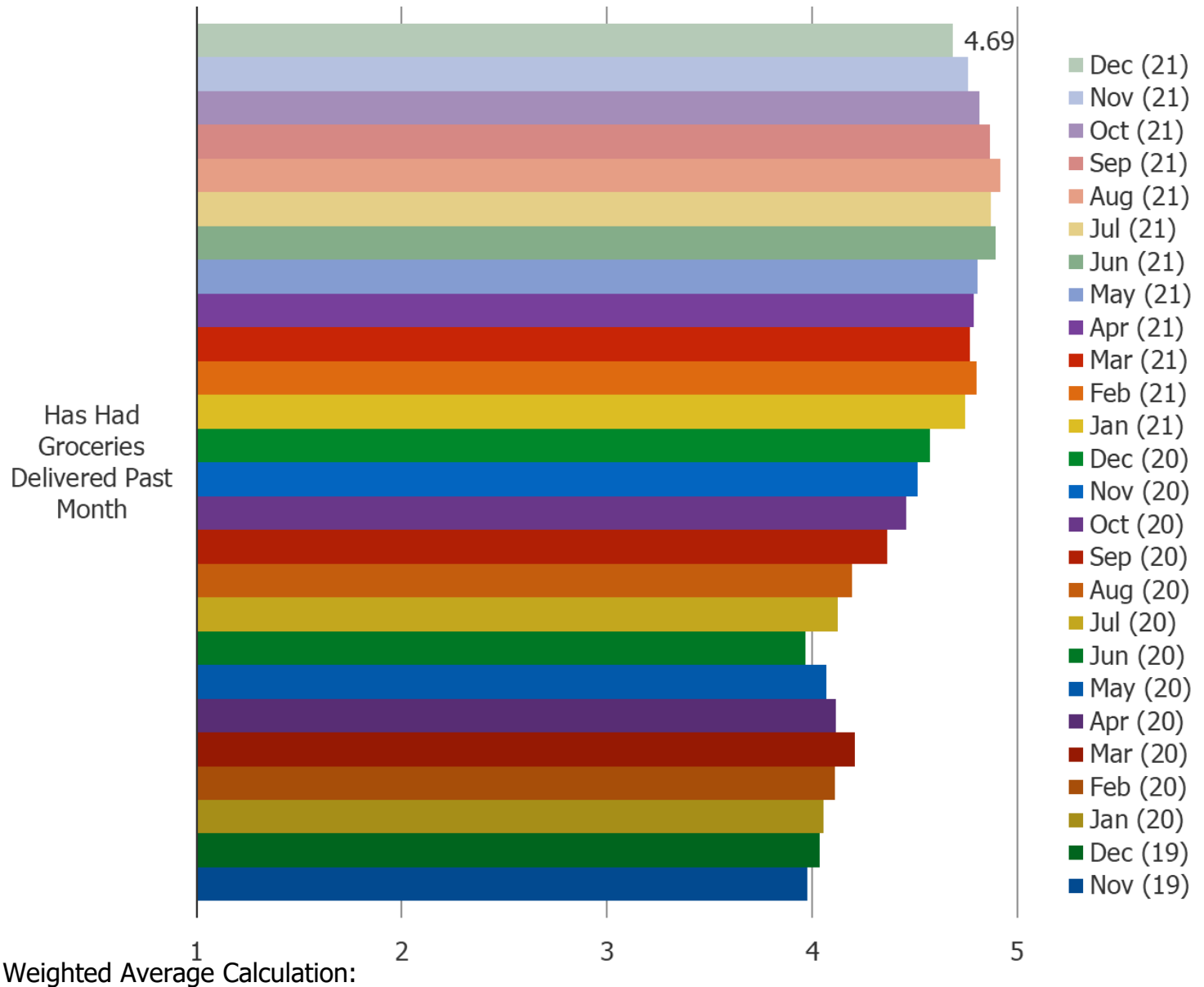
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- 5 = Multiple times per week
- 6 = Around once a day
- 7 = Multiple times per day

Food Delivery Apps

Audience: 1,000 US Consumers

Date: January 2022

USAGE OF FOOD DELIVERY APPS IN GENERAL – CROSS-TABBED BY RESPONDENTS WHO HAVE HAD GROCERIES DELIVERED IN THE PAST MONTH



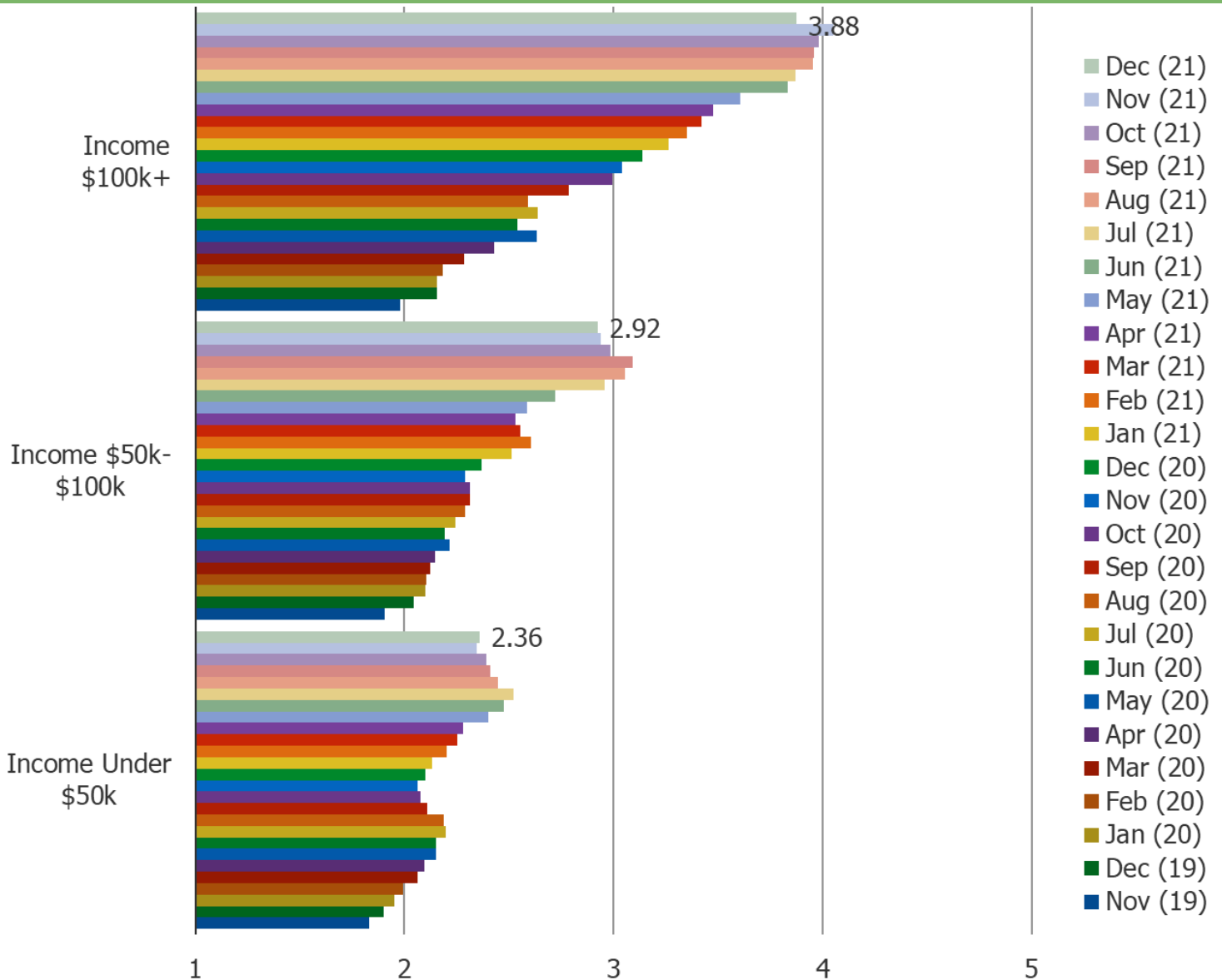
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- 3 = Once or twice a month
- 4 = Around once a week
- 5 = Multiple times per week
- 6 = Around once a day
- 7 = Multiple times per day

Food Delivery Apps

Audience: 1,000 US Consumers

Date: January 2022

USAGE OF FOOD DELIVERY APPS IN GENERAL – CROSS-TABBED BY INCOME



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

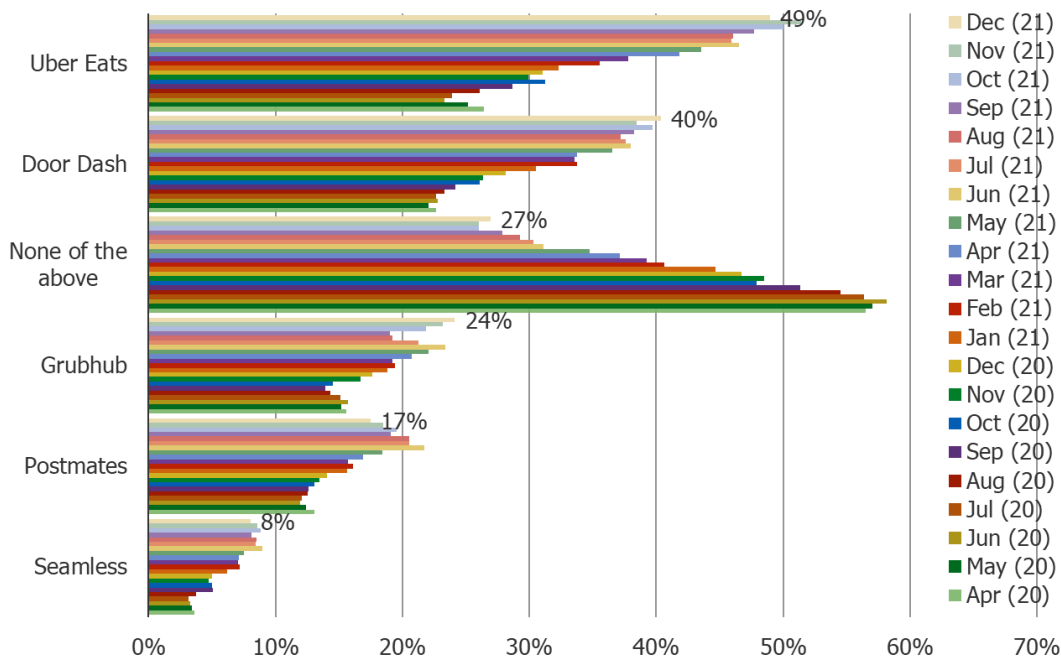
Food Delivery Apps

Audience: 1,000 US Consumers

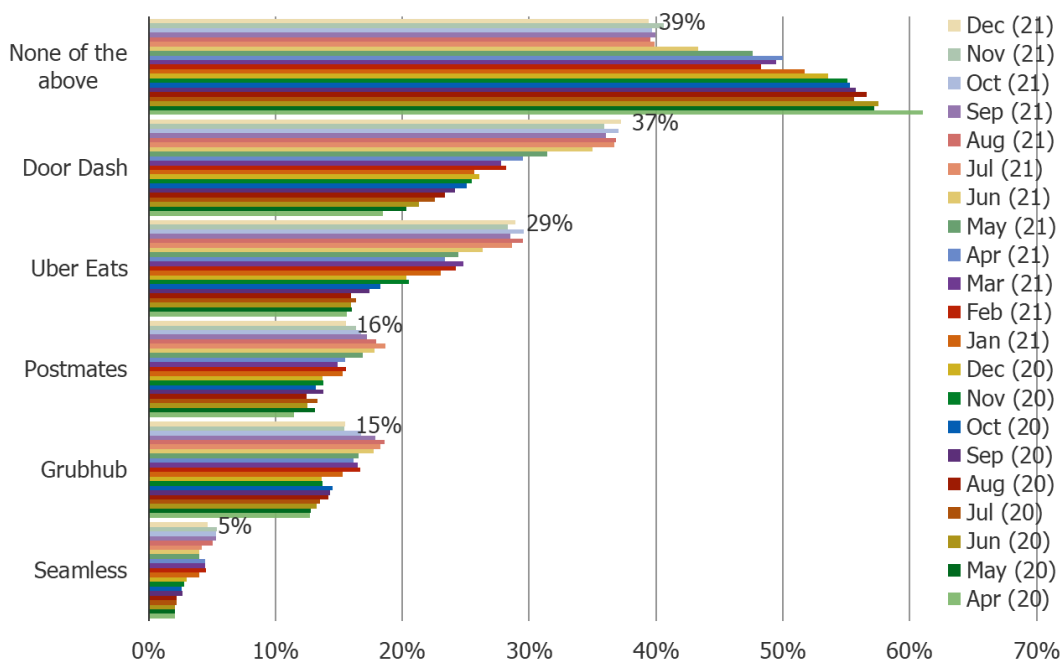
Date: January 2022

**% 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**

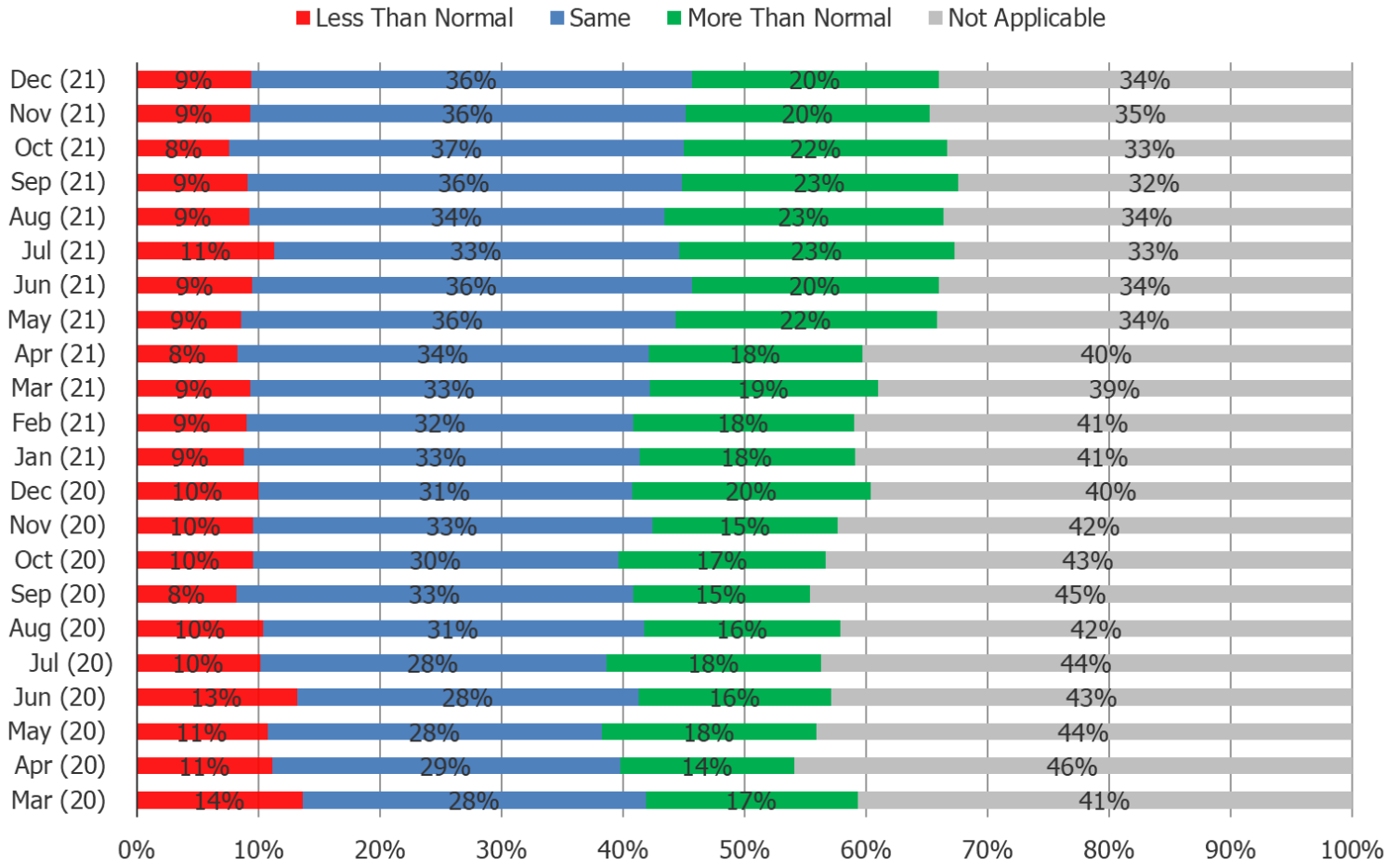


Food Delivery Apps

Audience: 1,000 US Consumers  
Date: January 2022

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

Posed to all respondents.

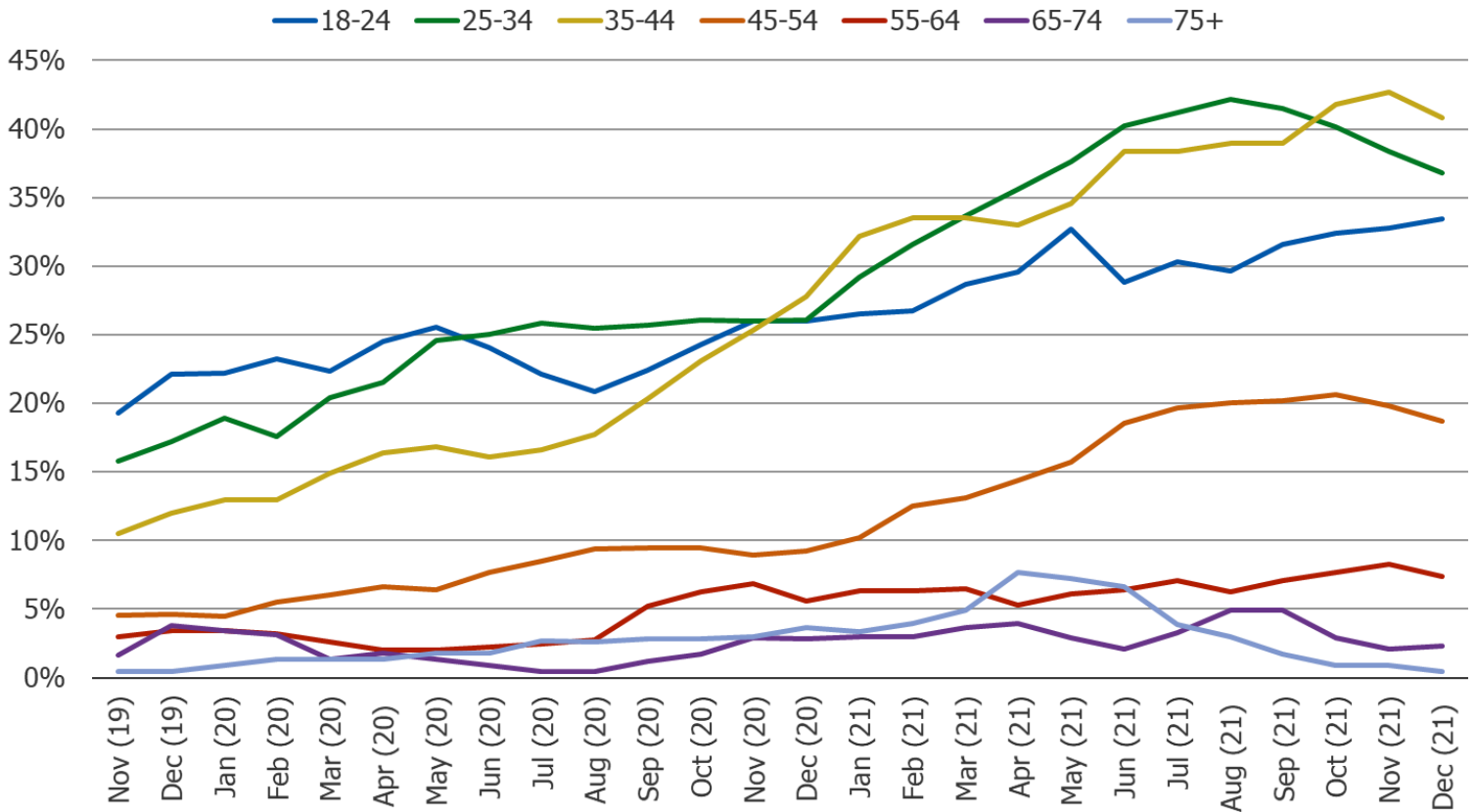




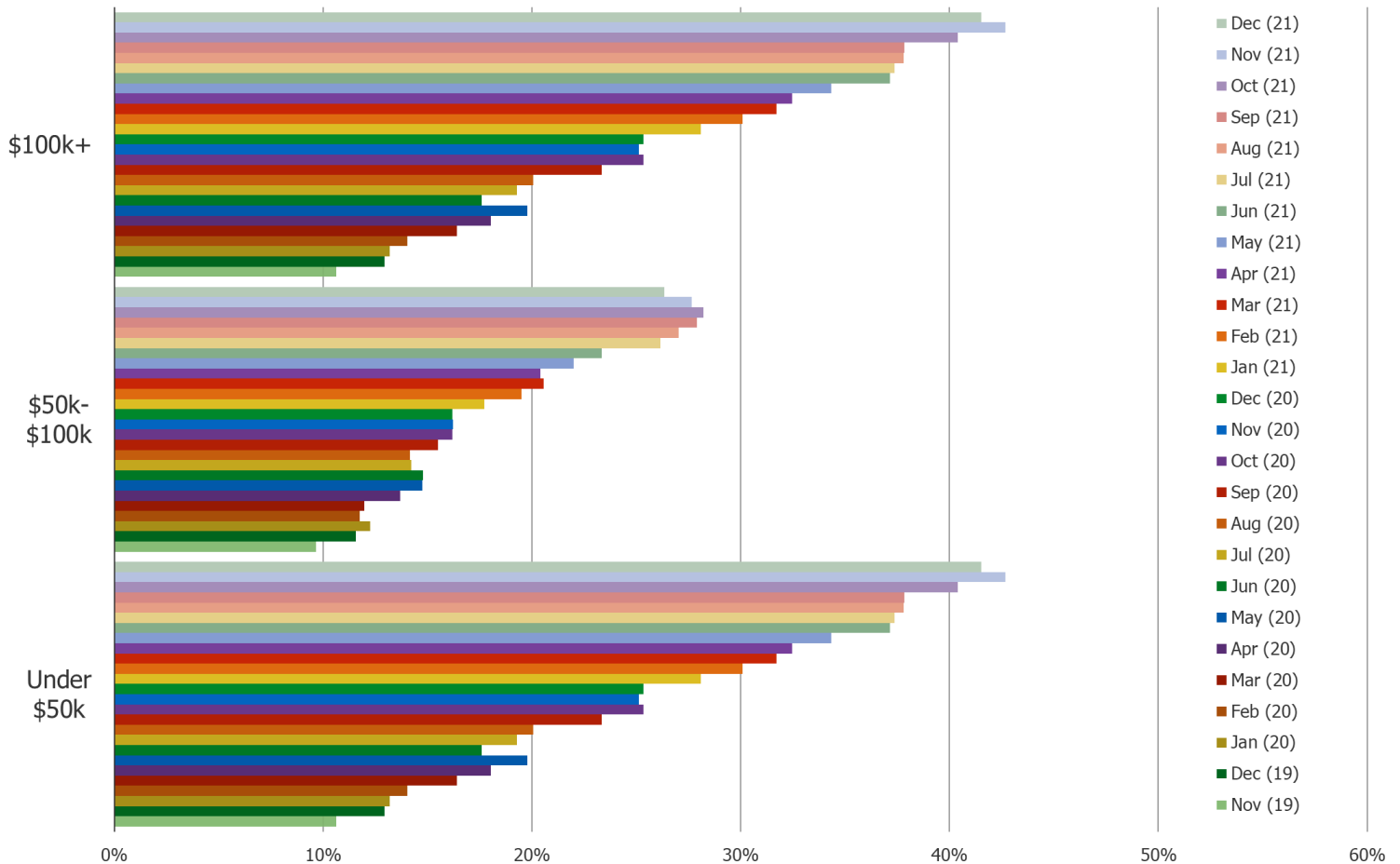
Food Delivery Apps

Audience: 1,000 US Consumers  
Date: January 2022

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



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

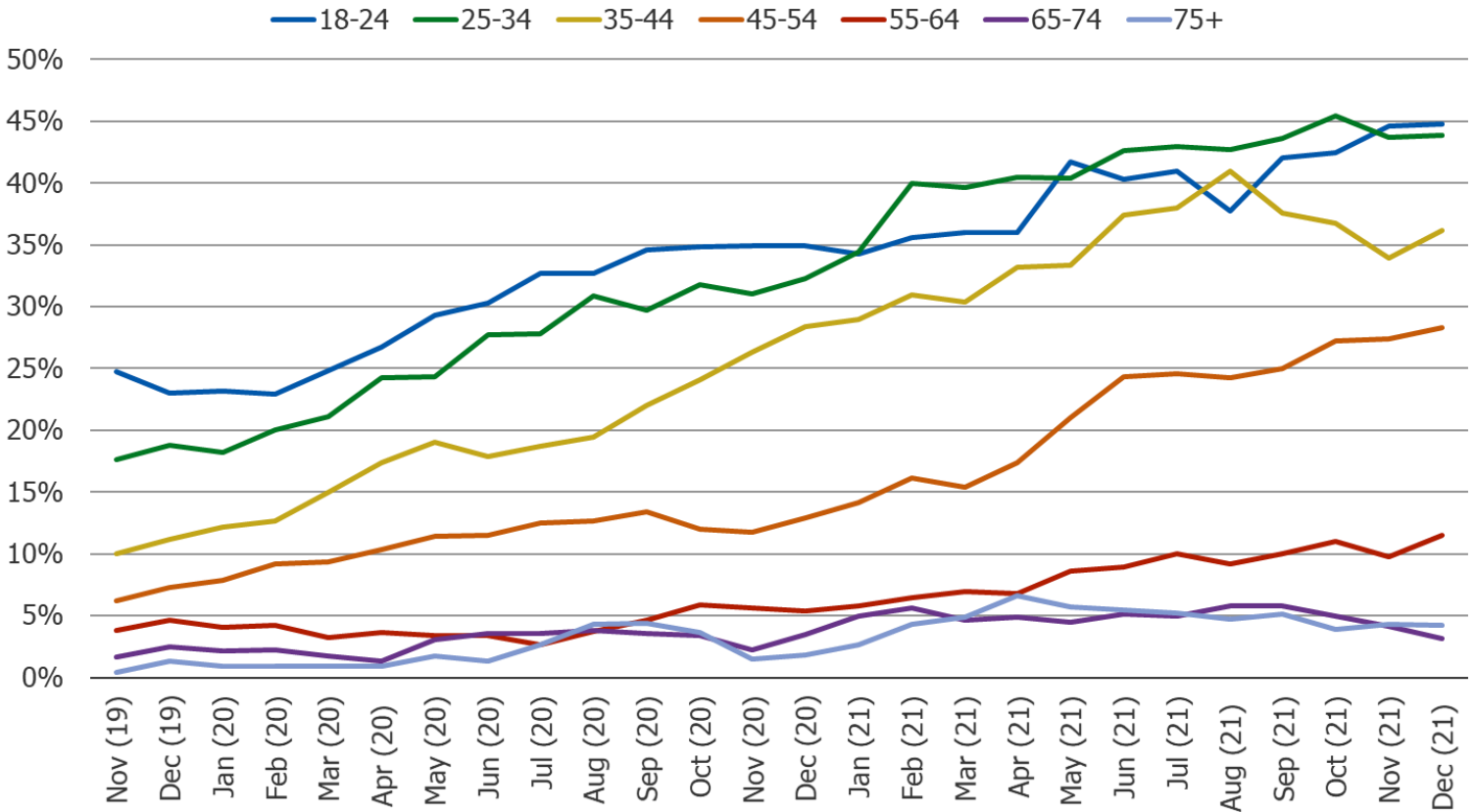


Food Delivery Apps

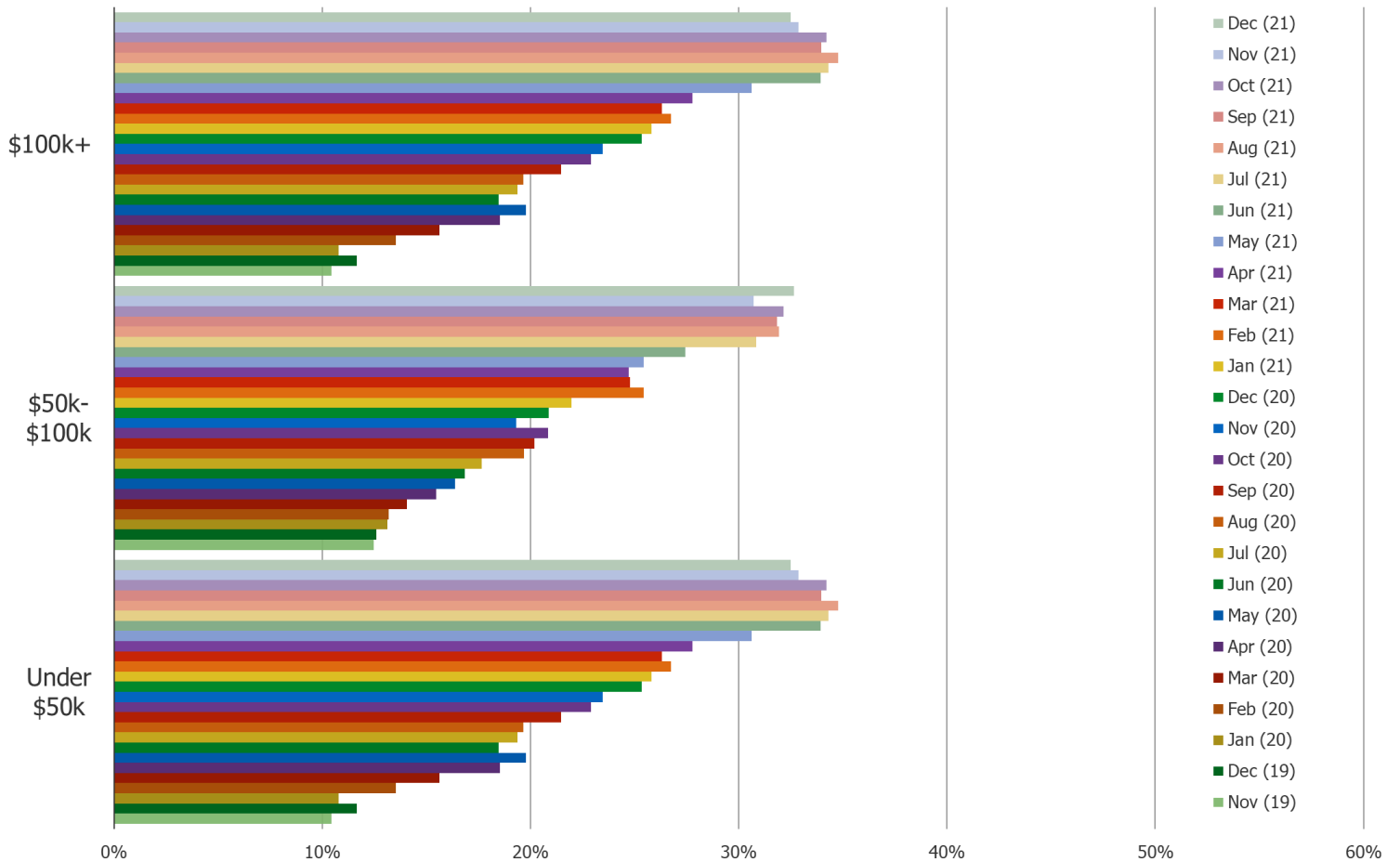
Audience: 1,000 US Consumers

Date: January 2022

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



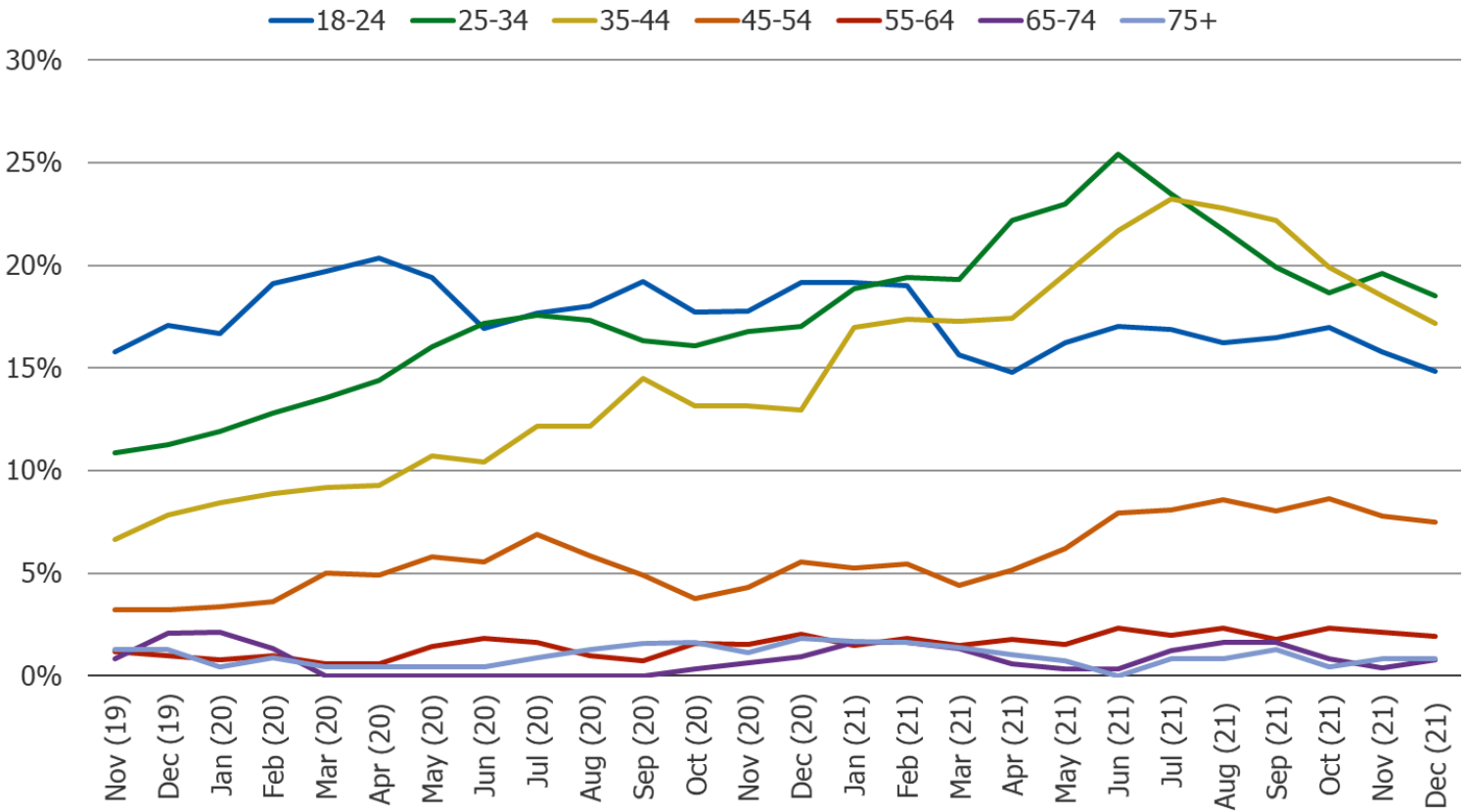
ADOPTION CURVE BY INCOME – DOOR DASH (REGULARLY OR OCCASIONALLY USES PLATFORM)



Food Delivery Apps

Audience: 1,000 US Consumers  
Date: January 2022

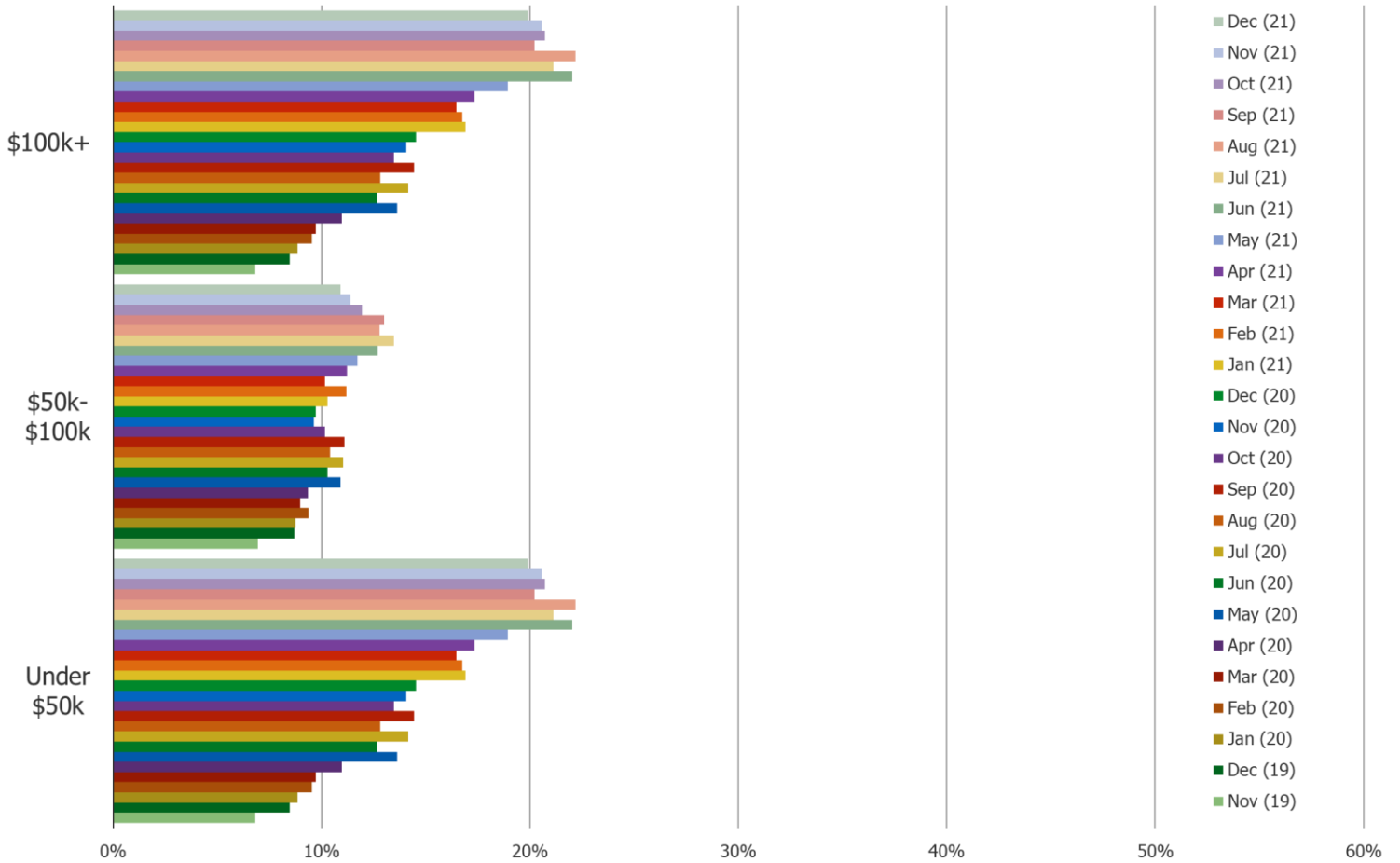
ADOPTION CURVE BY AGE – POSTMATES (REGULARLY OR OCCASIONALLY USES PLATFORM)



Food Delivery Apps

Audience: 1,000 US Consumers  
Date: January 2022

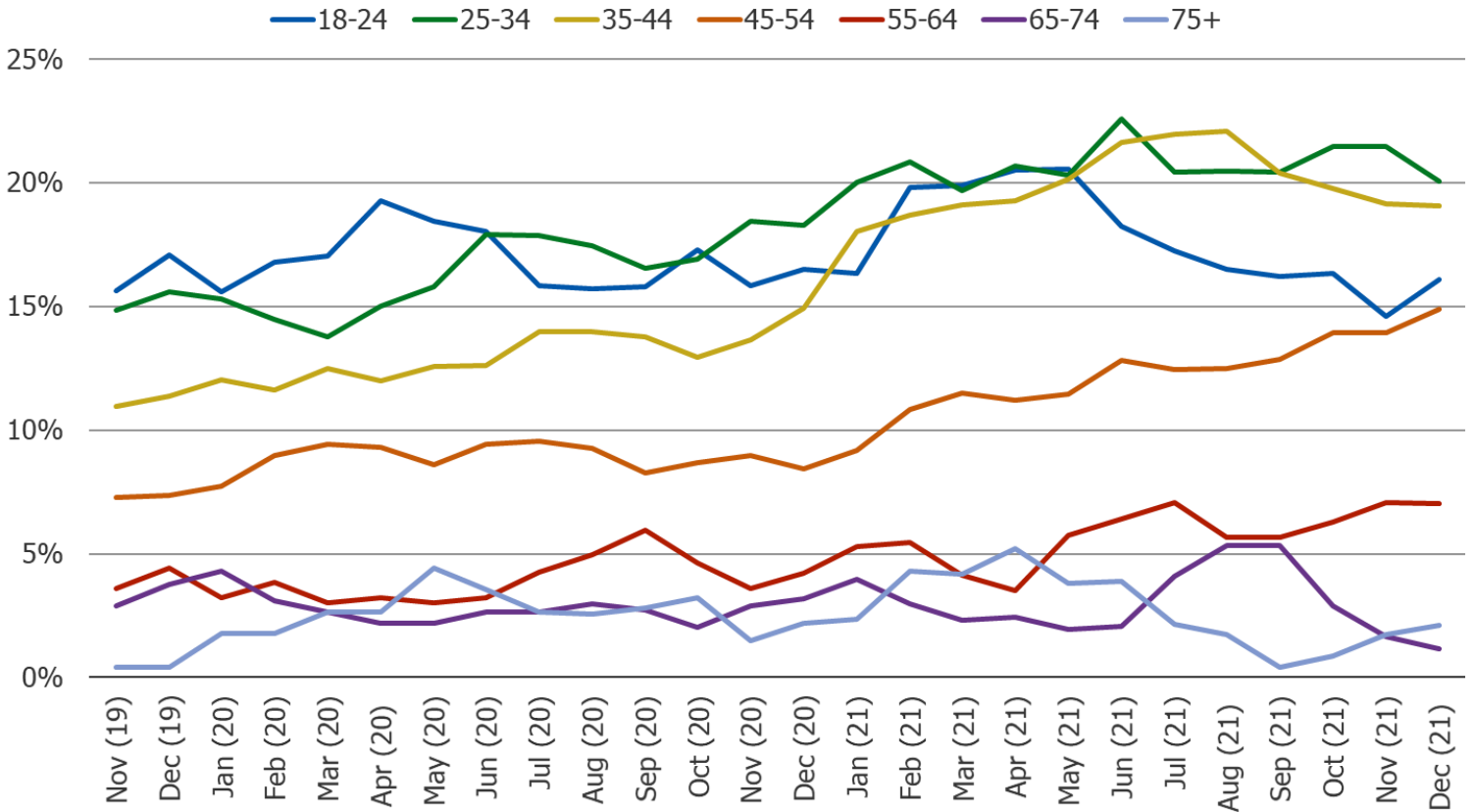
ADOPTION CURVE BY INCOME – POSTMATES (REGULARLY OR OCCASIONALLY USES PLATFORM)



Food Delivery Apps

Audience: 1,000 US Consumers  
Date: January 2022

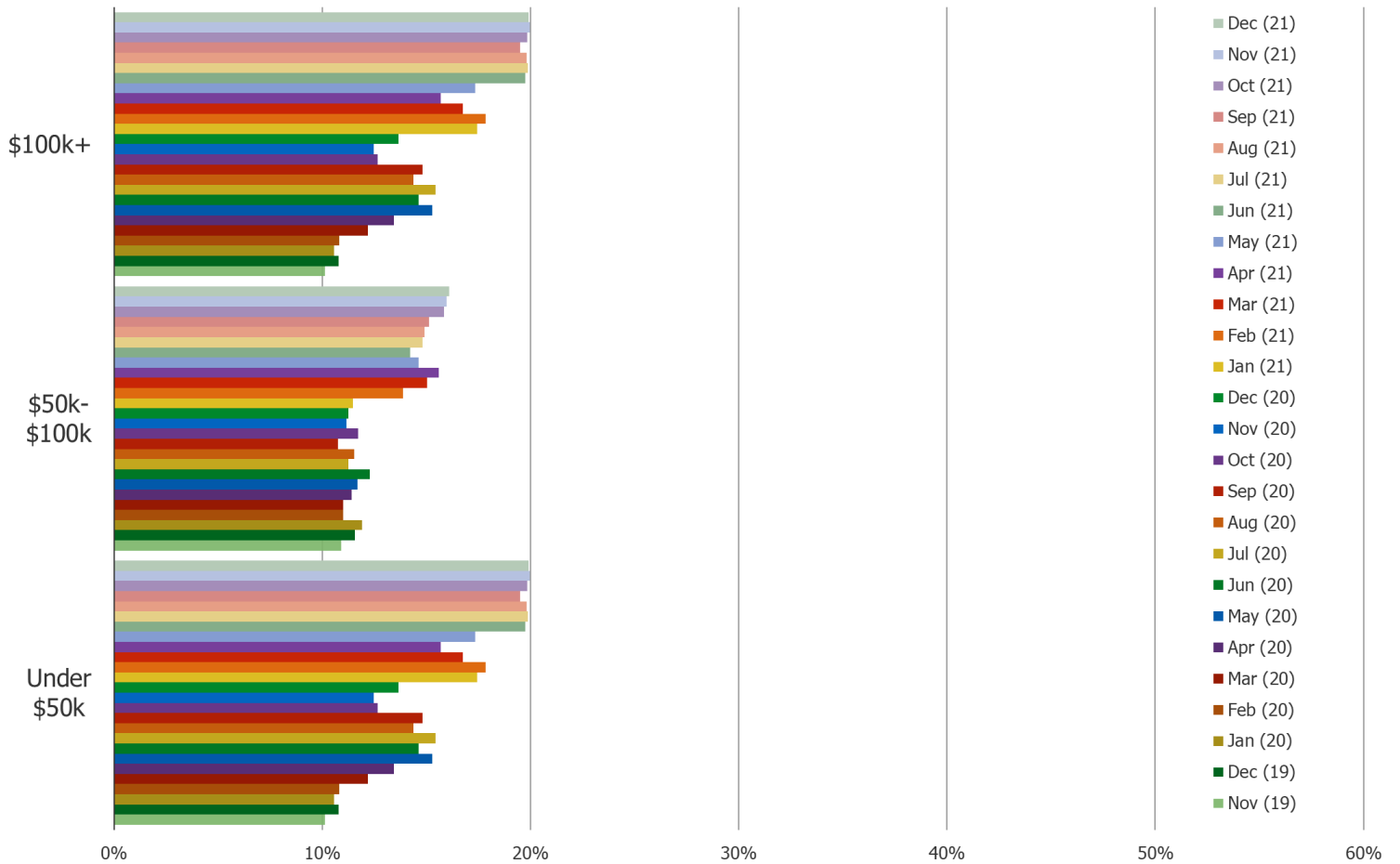
ADOPTION CURVE BY AGE – GRUBHUB (REGULARLY OR OCCASIONALLY USES PLATFORM)



Food Delivery Apps

Audience: 1,000 US Consumers  
Date: January 2022

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



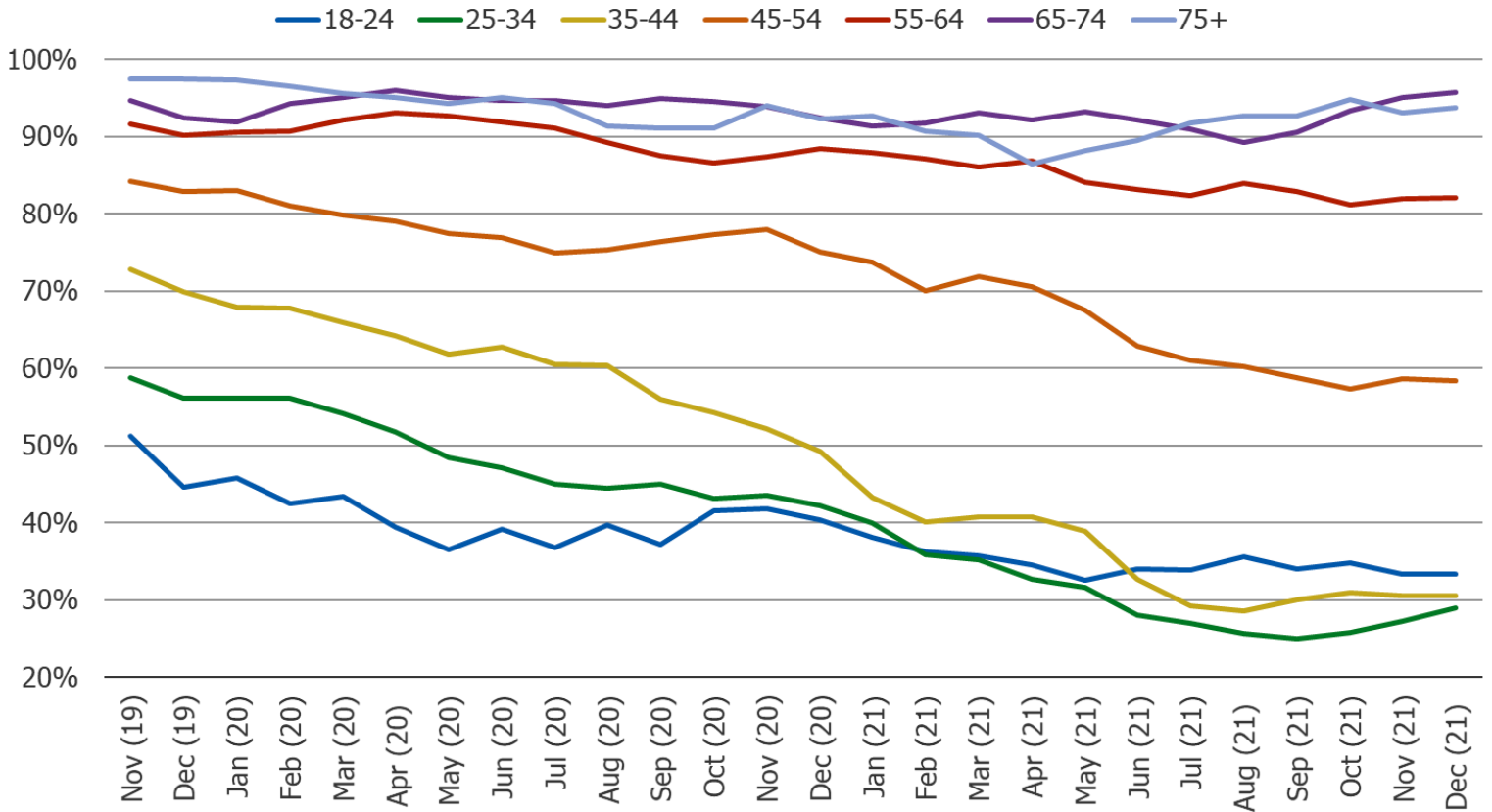


Food Delivery Apps

Audience: 1,000 US Consumers

Date: January 2022

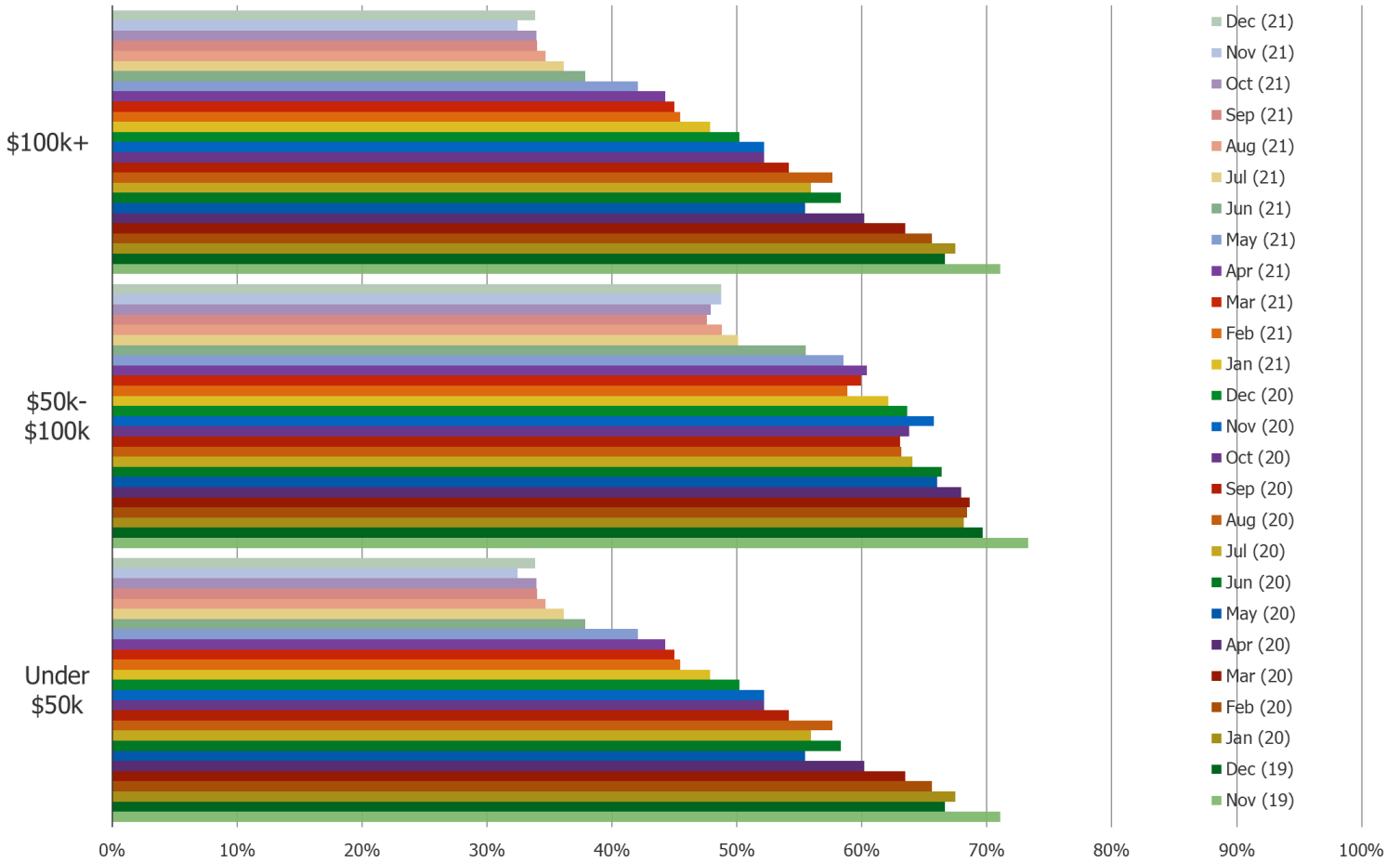
ADOPTION CURVE BY AGE –REGULARLY OR OCCASIONALLY USES NONE OF THE ABOVE PLATFORMS (OPTIONS SHOWN INCLUDE UBER EATS, DOOR DASH, POSTMATES, GRUBHUB, AND SEAMLESS)



Food Delivery Apps

Audience: 1,000 US Consumers  
Date: January 2022

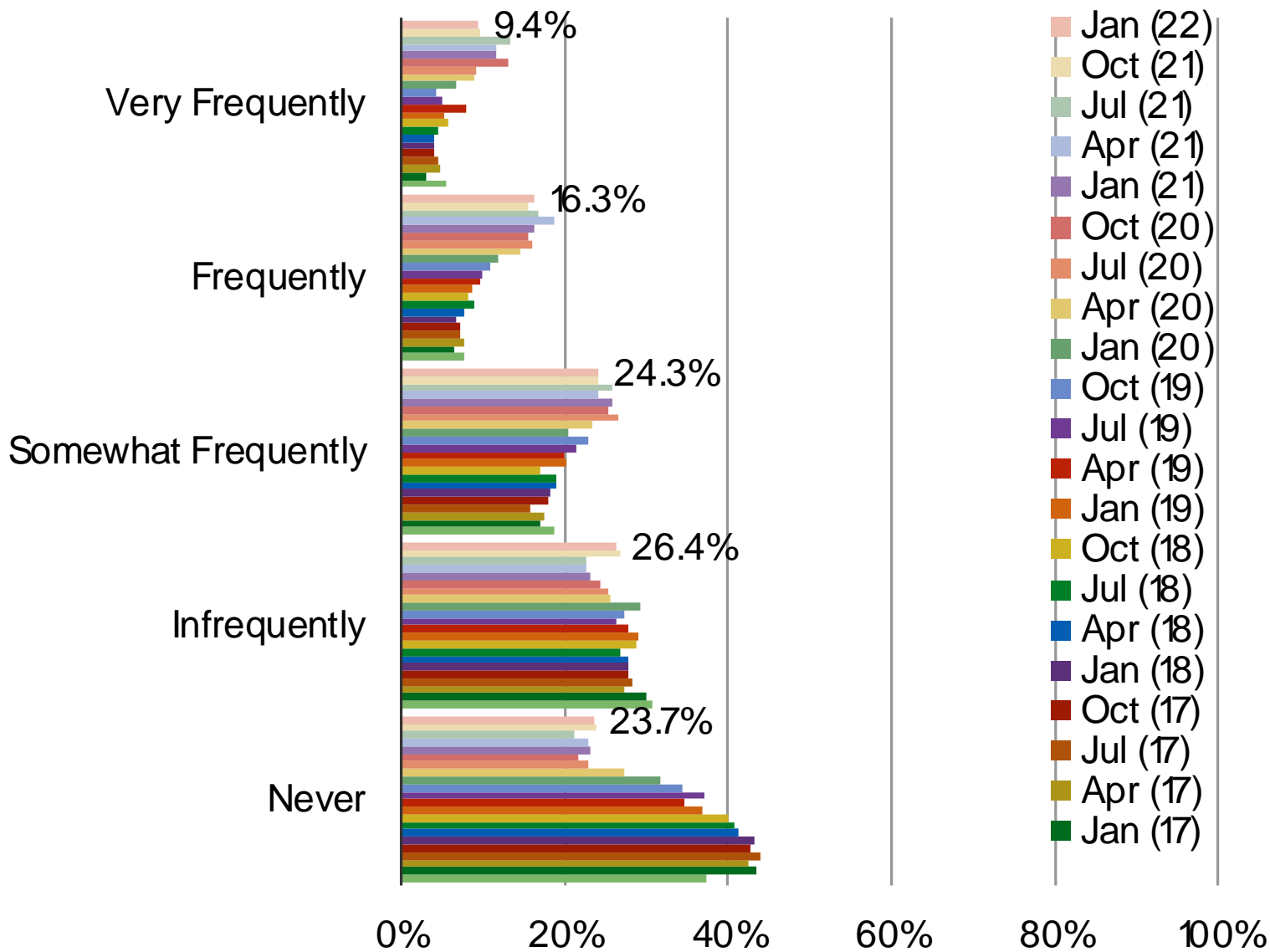
ADOPTION CURVE BY INCOME –REGULARLY OR OCCASIONALLY USES NONE OF THE ABOVE PLATFORMS (OPTIONS SHOWN INCLUDE UBER EATS, DOOR DASH, POSTMATES, GRUBHUB, AND SEAMLESS)



## USAGE TRENDS AND SENTIMENT READINGS

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

Posed to all respondents.



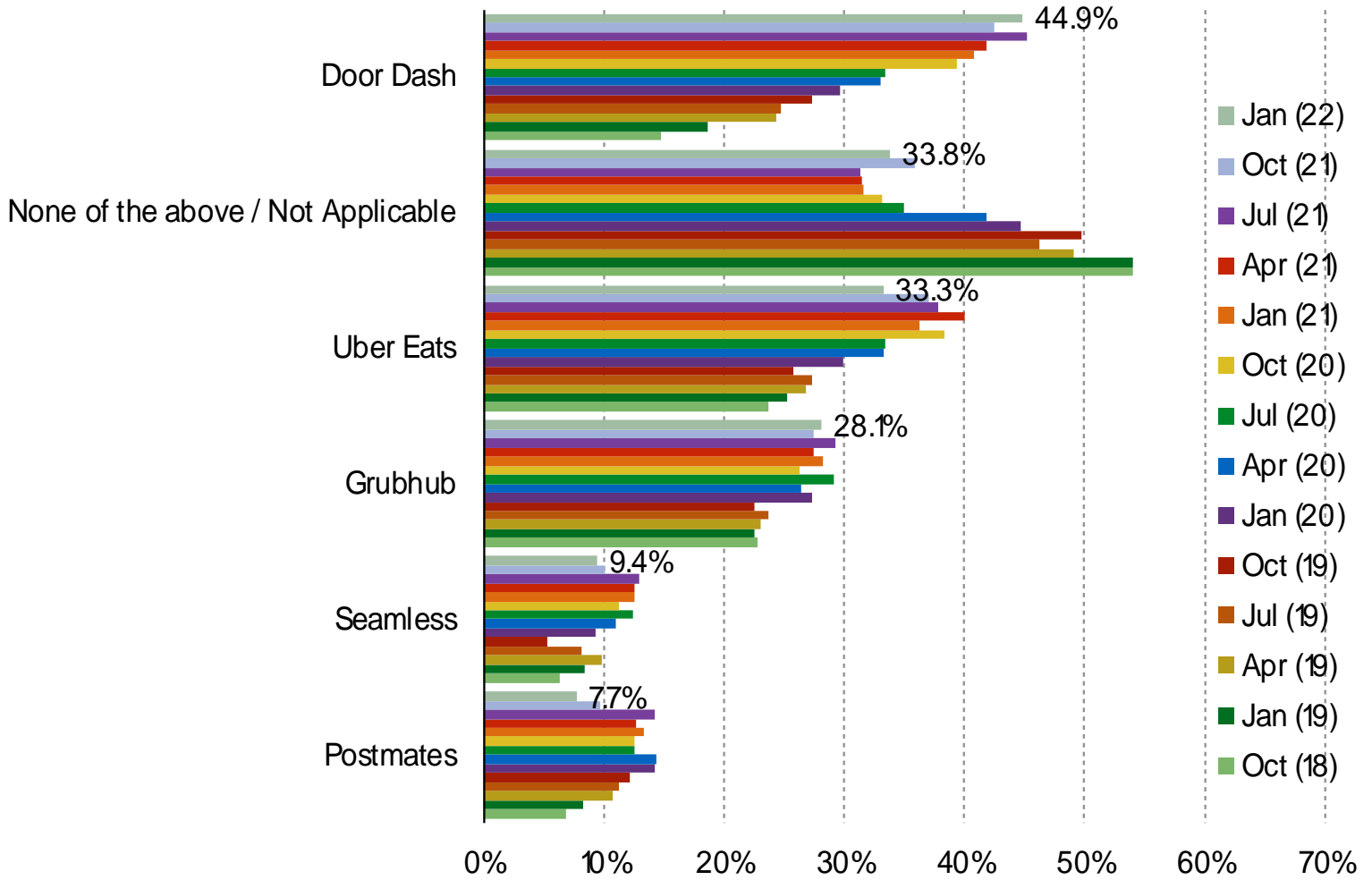
N = 1520

Food Delivery Apps

Audience: 1,000 US Consumers  
Date: January 2022

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

Posed to respondents who use food delivery apps.



N = 1166

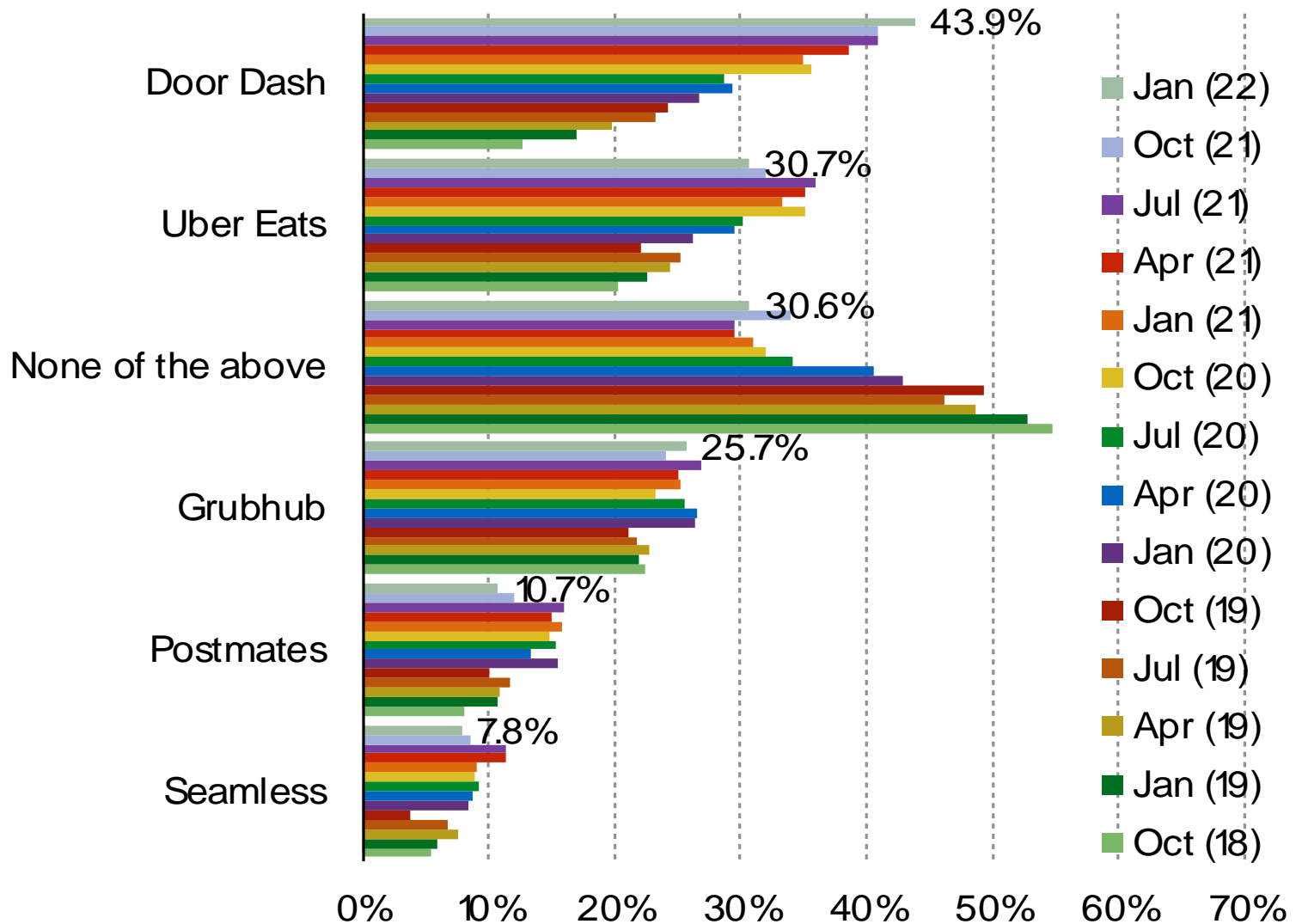
Food Delivery Apps

Audience: 1,000 US Consumers

Date: January 2022

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 = 1166

Food Delivery Apps

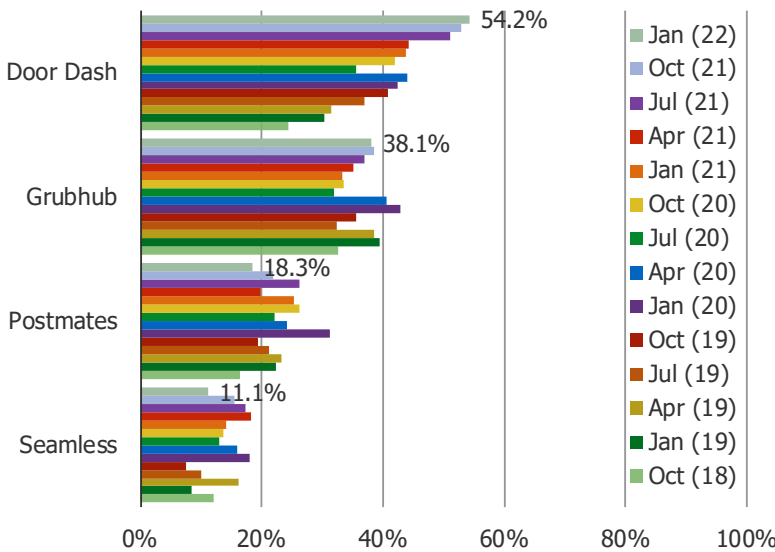
Audience: 1,000 US Consumers

Date: January 2022

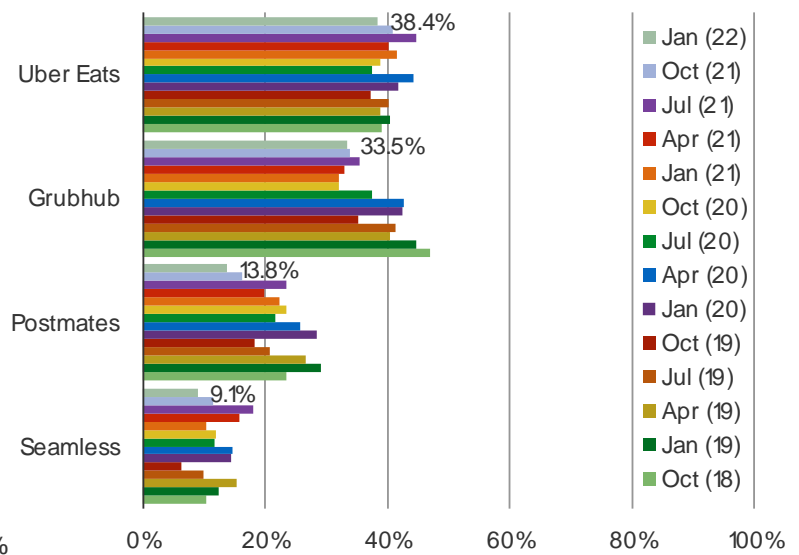
CROSS-OVER: REGULARLY OR OCCASIONALLY USES EACH OF THE FOLLOWING, WHAT OTHER PLATFORMS DO THEY ALSO USE REGULARLY OR OCCASIONALLY?

Posed to respondents who use food delivery apps.

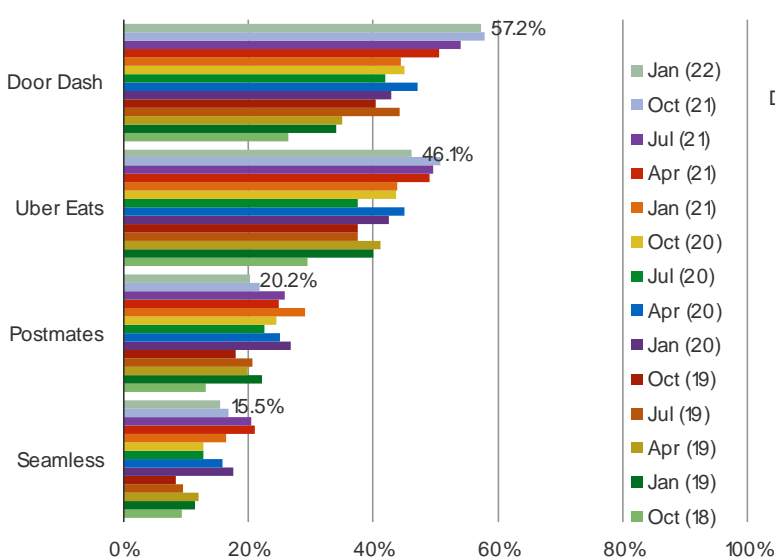
Uber Eats Users Also Use



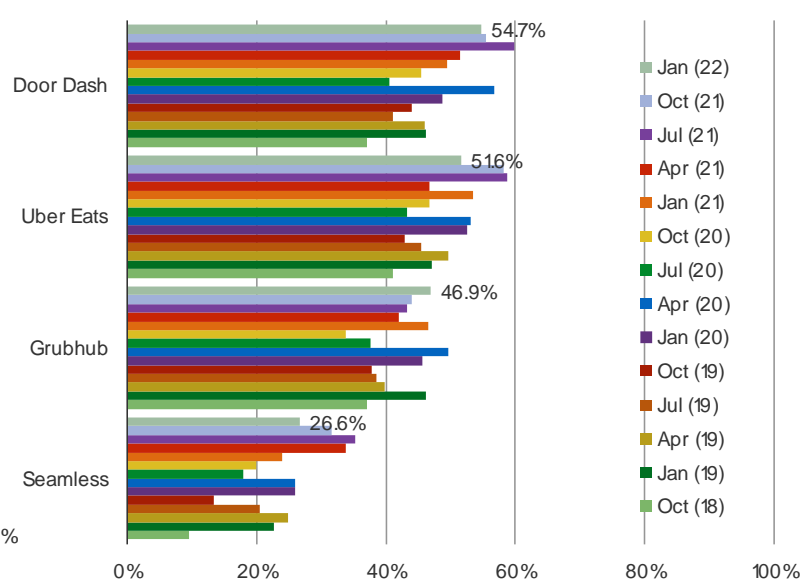
Door Dash Users Also Use



GrubHub Users Also Use



Postmates Users Also Use



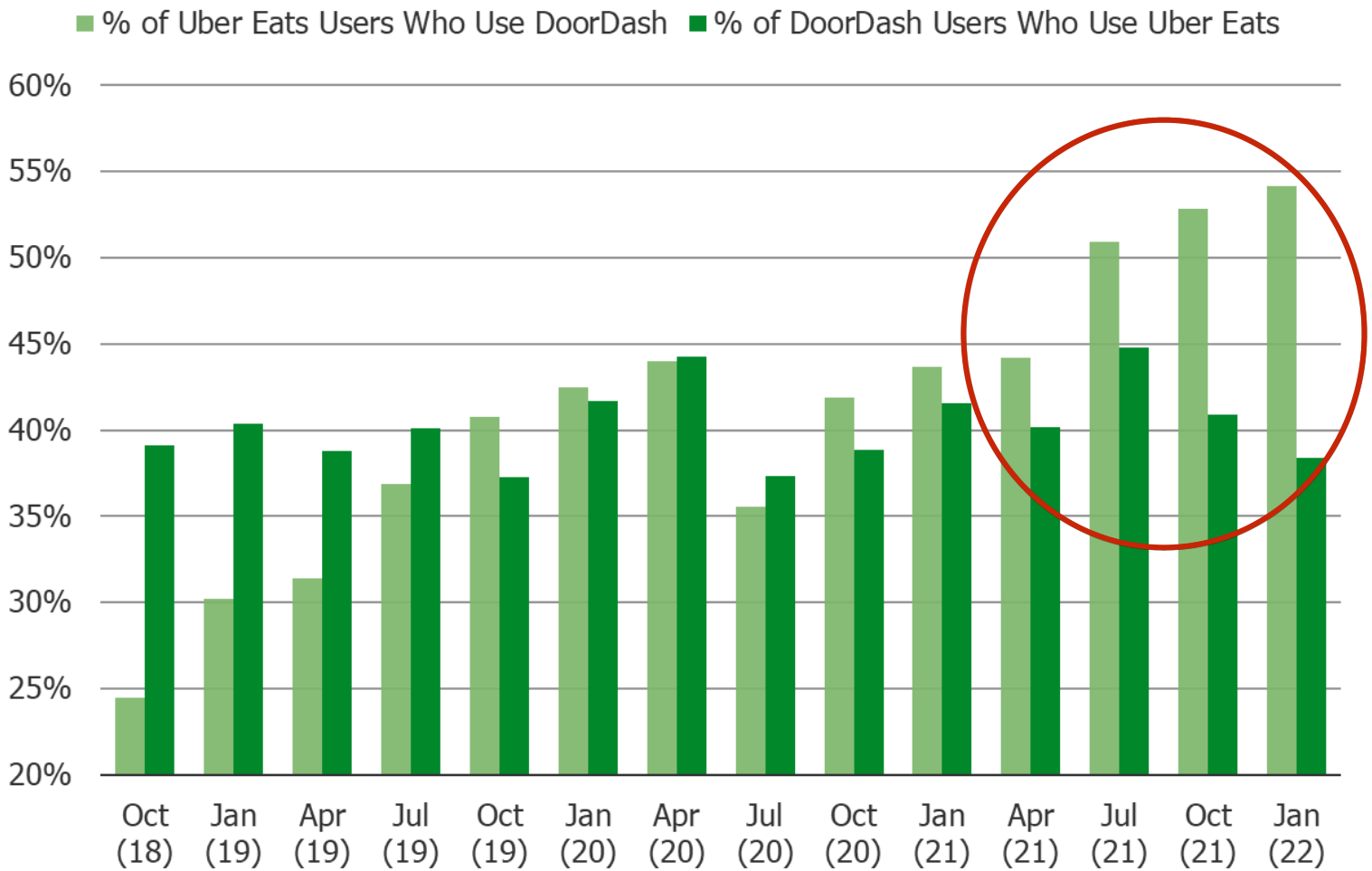
	N=
Uber Eats	360
Door Dash	508
Seamless	91
Grubhub	297
Postmates	128

Food Delivery Apps

Audience: 1,000 US Consumers  
Date: January 2022

CROSS-OVER BETWEEN DOORDASH AND UBER EATS USER BASES

Posed to respondents who use food delivery apps.





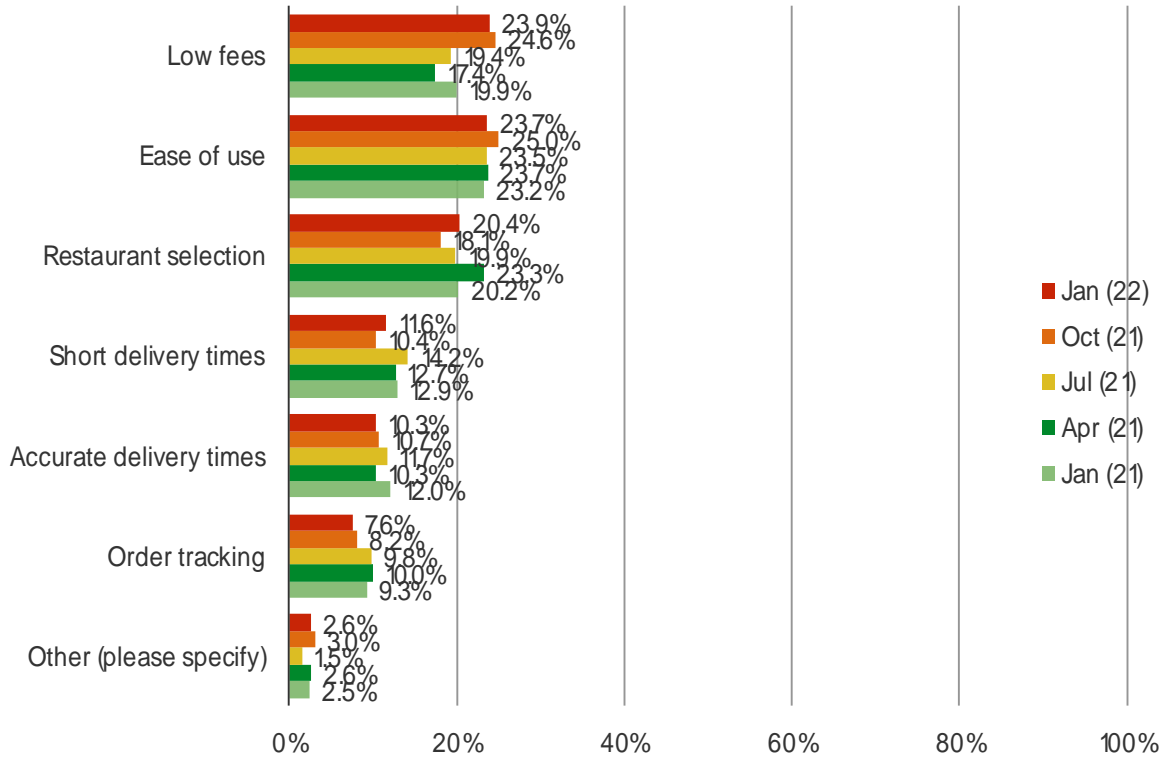
Food Delivery Apps

Audience: 1,000 US Consumers

Date: January 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 = 1168

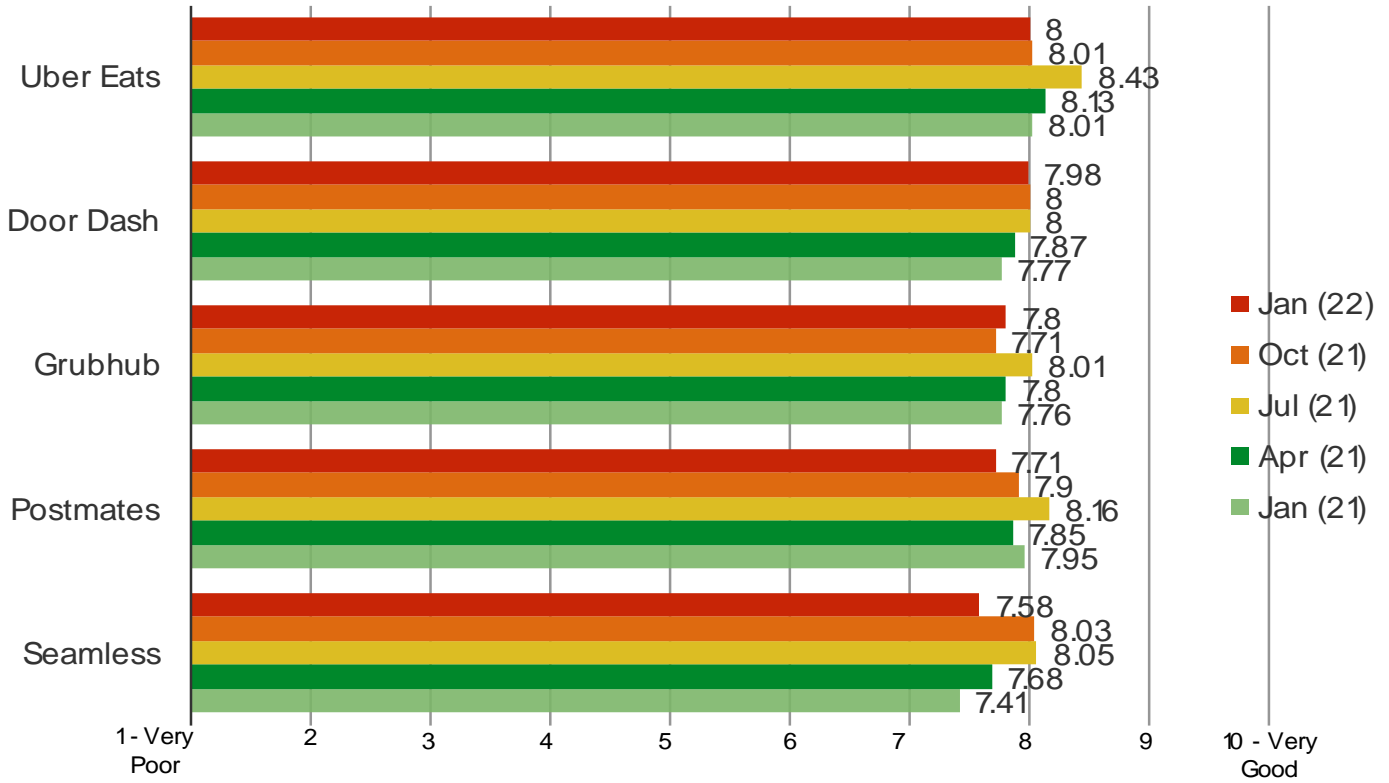
Food Delivery Apps

Audience: 1,000 US Consumers

Date: January 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	391
Door Dash	525
Seamless	110
Grubhub	327
Postmates	96

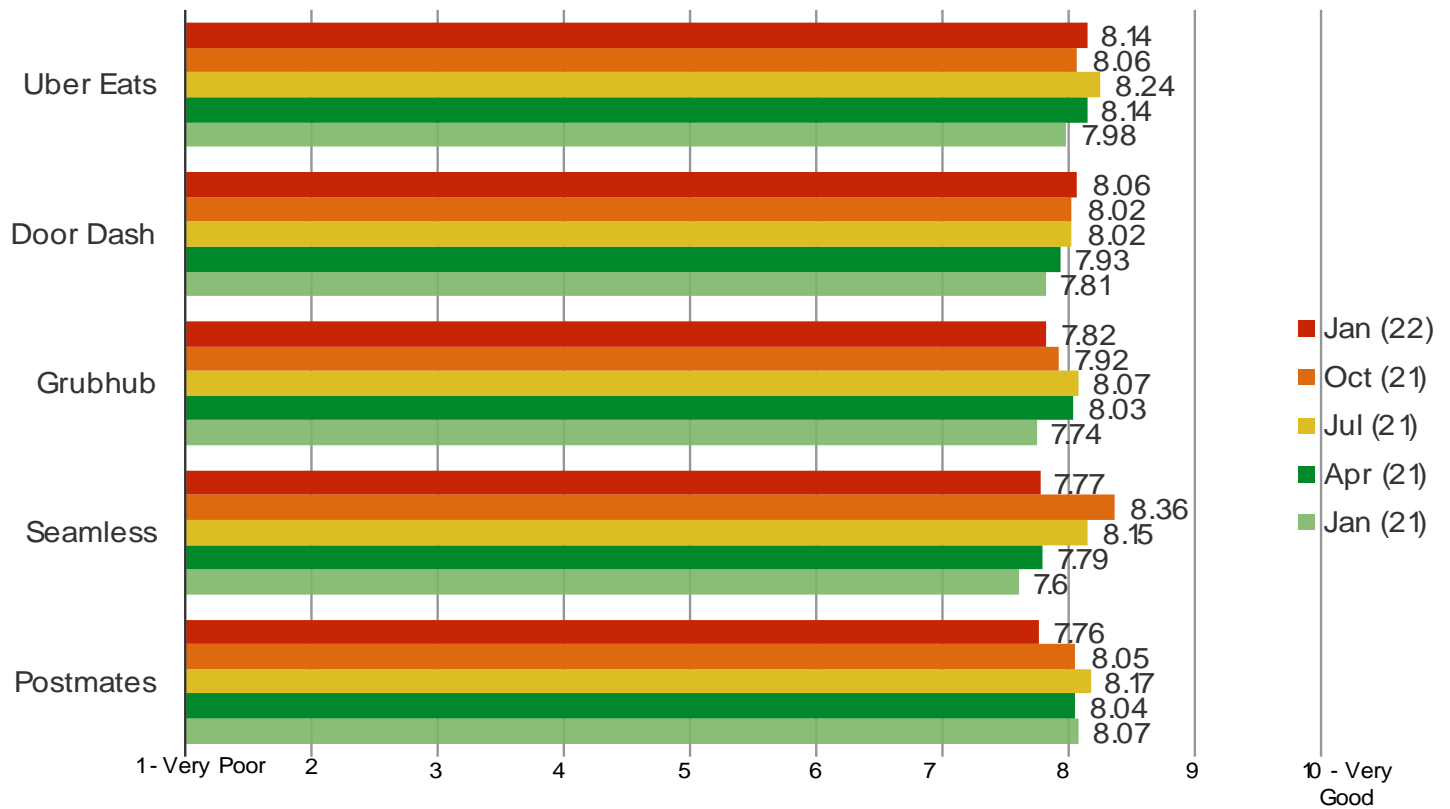
Food Delivery Apps

Audience: 1,000 US Consumers

Date: January 2022

PLEASE RATE THE FOLLOWING WHEN IT COMES TO RESTAURANT SELECTION:

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



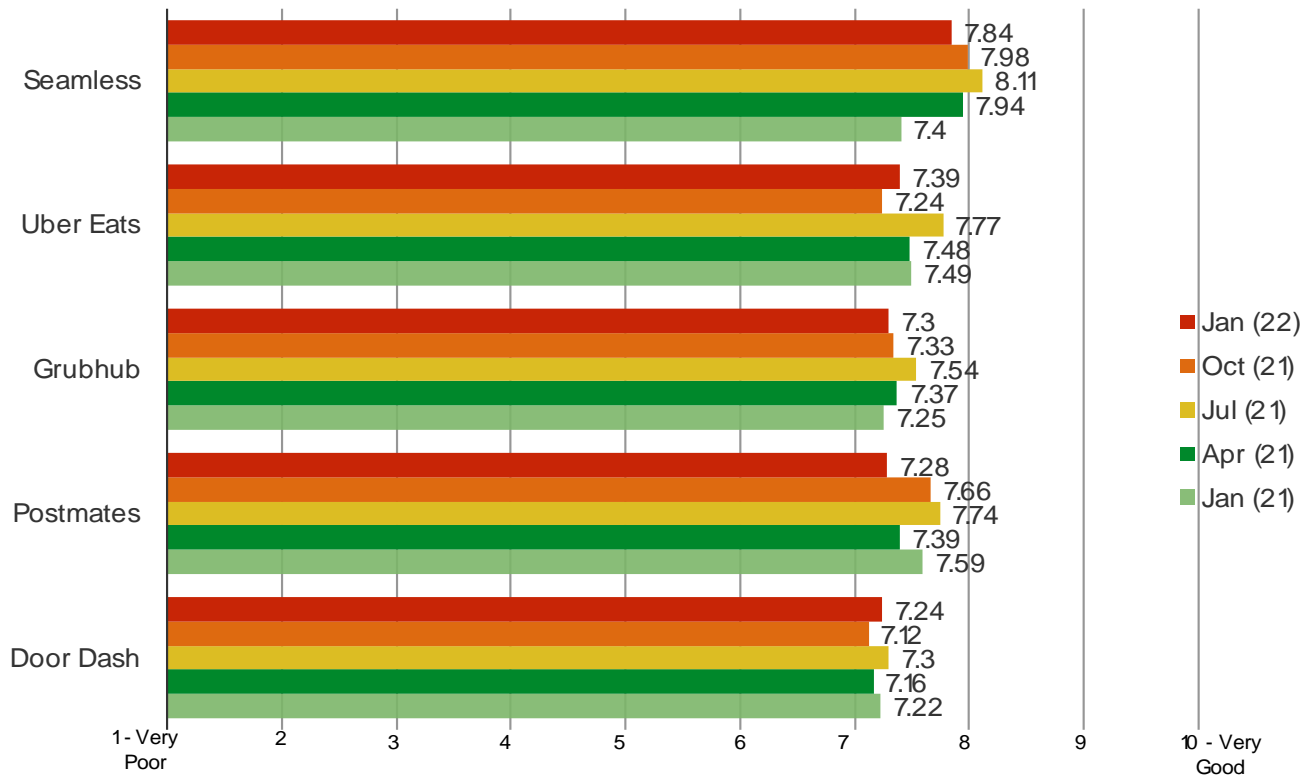
	N=
Uber Eats	391
Door Dash	525
Seamless	110
Grubhub	327
Postmates	96

Food Delivery Apps

Audience: 1,000 US Consumers  
Date: January 2022

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

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



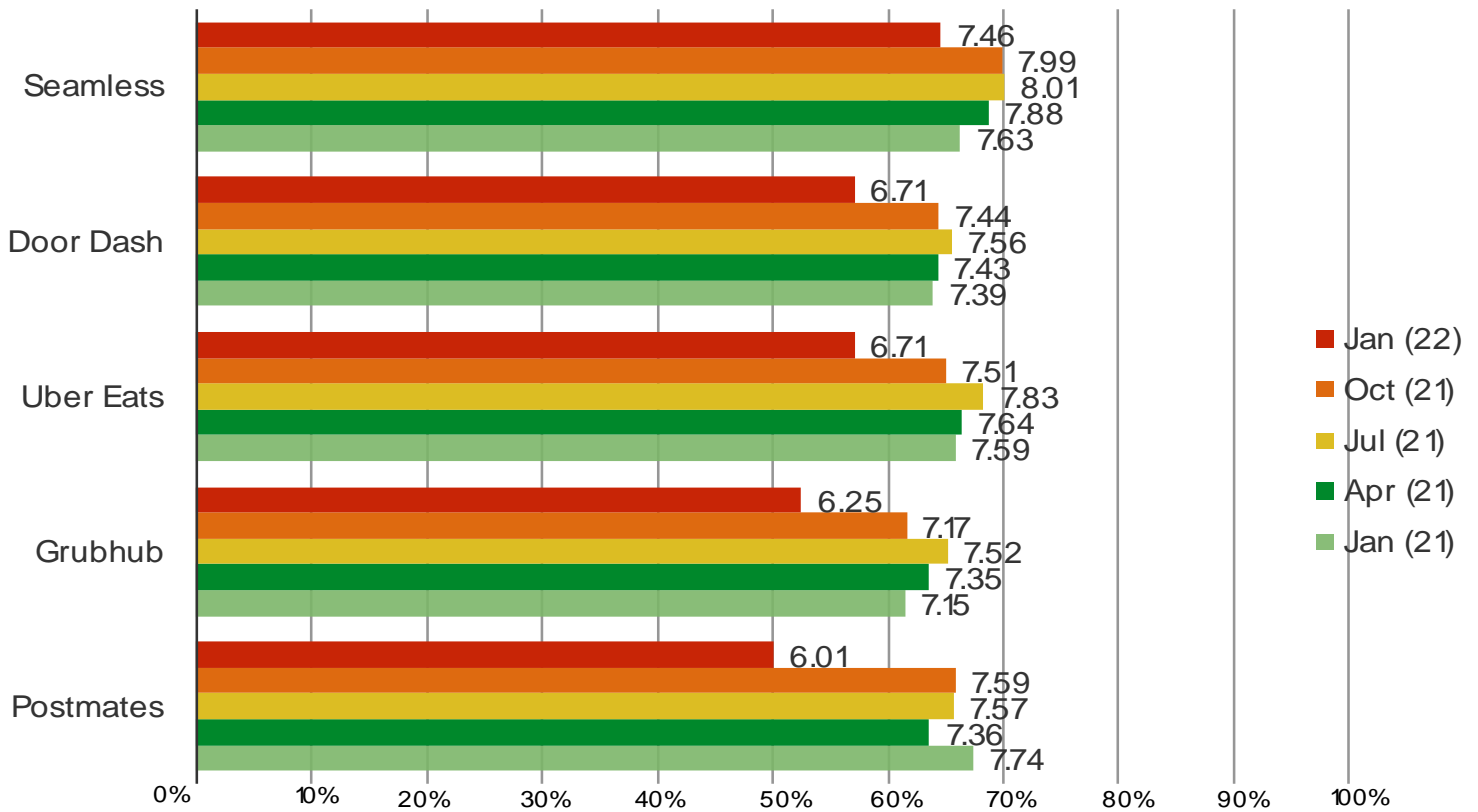
	N=
Uber Eats	391
Door Dash	525
Seamless	110
Grubhub	327
Postmates	96

Food Delivery Apps

Audience: 1,000 US Consumers  
Date: January 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	391
Door Dash	525
Seamless	110
Grubhub	327
Postmates	96

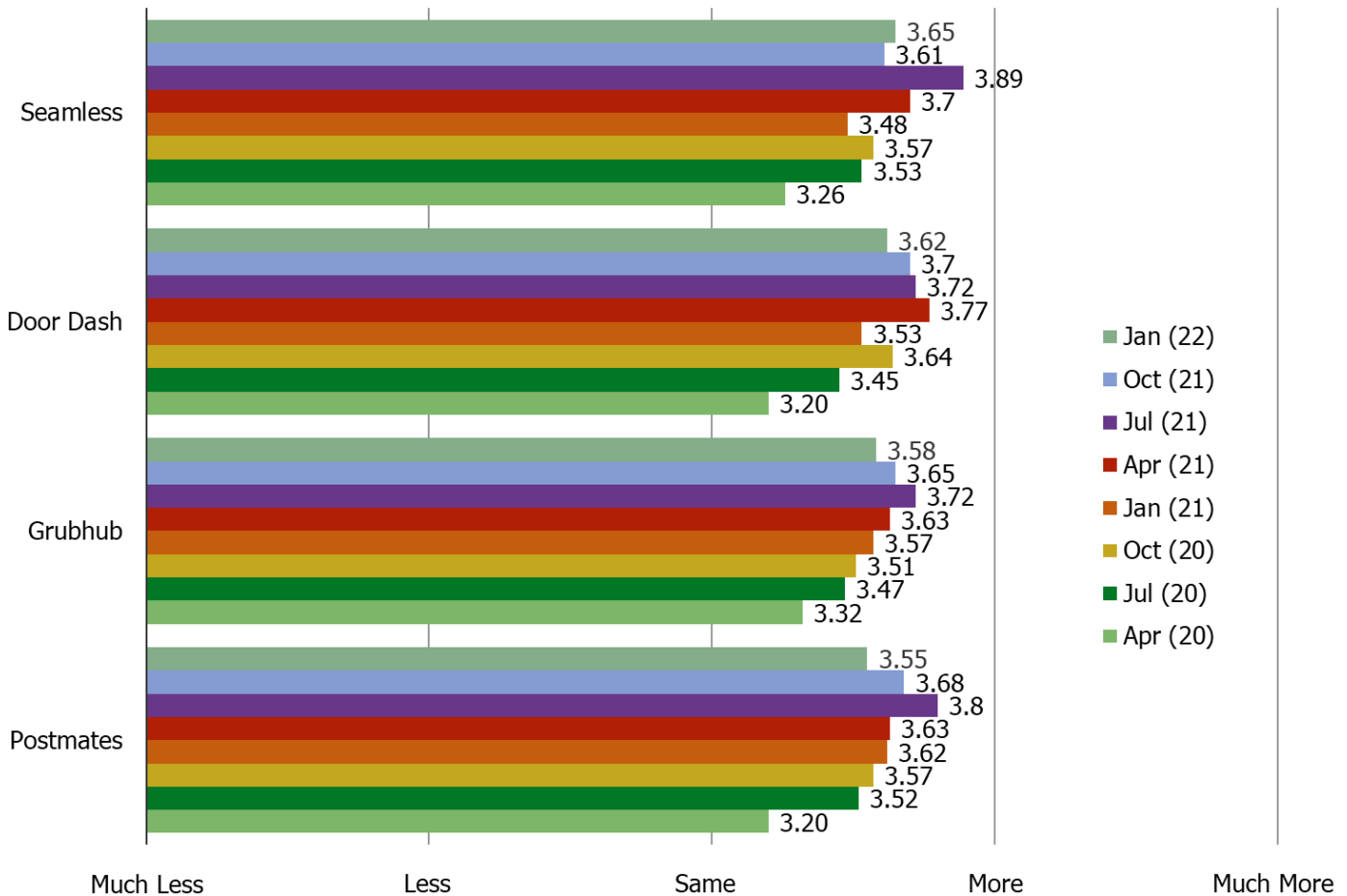
Food Delivery Apps

Audience: 1,000 US Consumers

Date: January 2022

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

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



	N=
Uber Eats	391
Door Dash	525
Seamless	110
Grubhub	327
Postmates	96

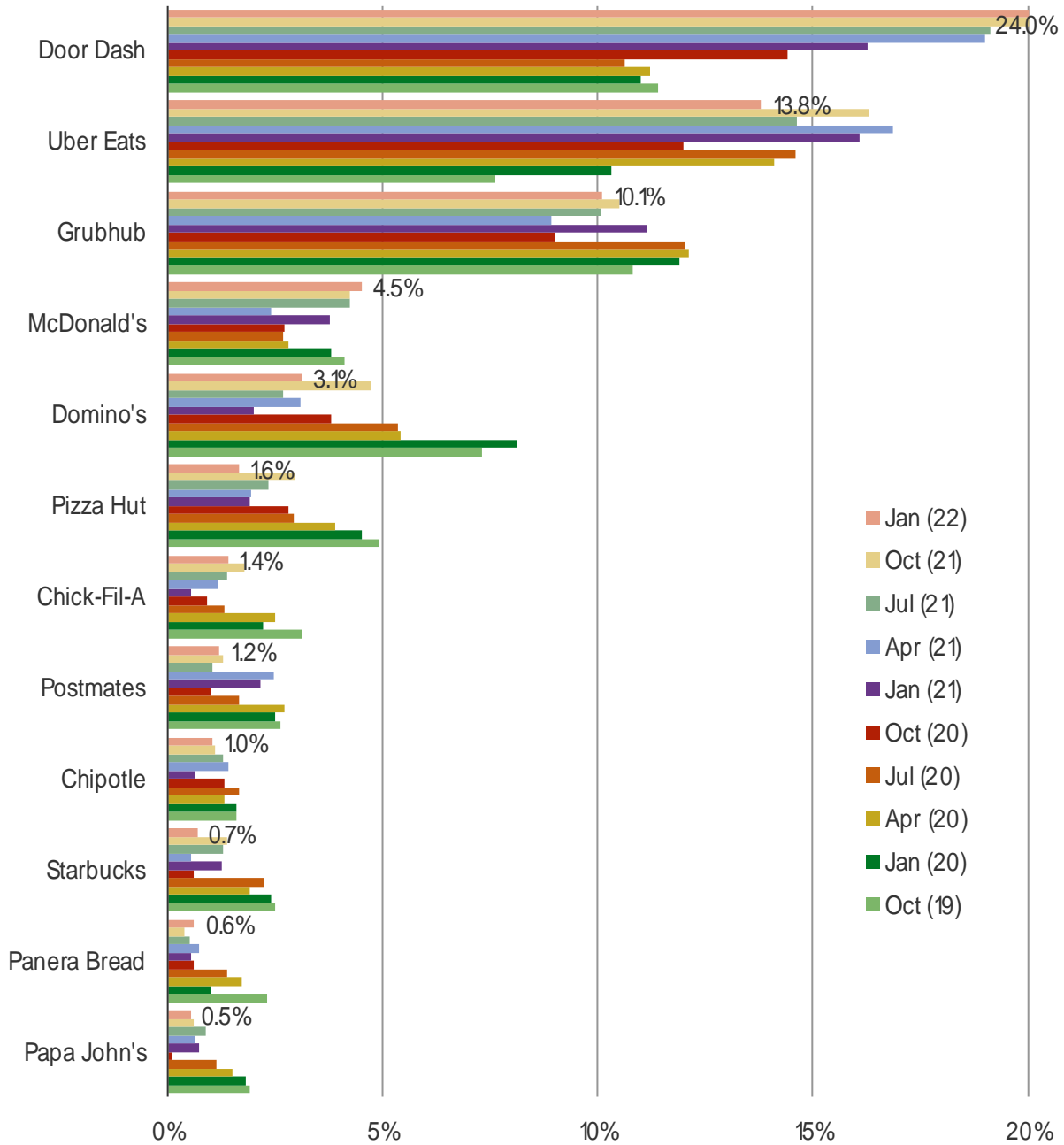
Food Delivery Apps

Audience: 1,000 US Consumers

Date: January 2022

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

Posed to respondents who use food delivery apps.



N = 1167

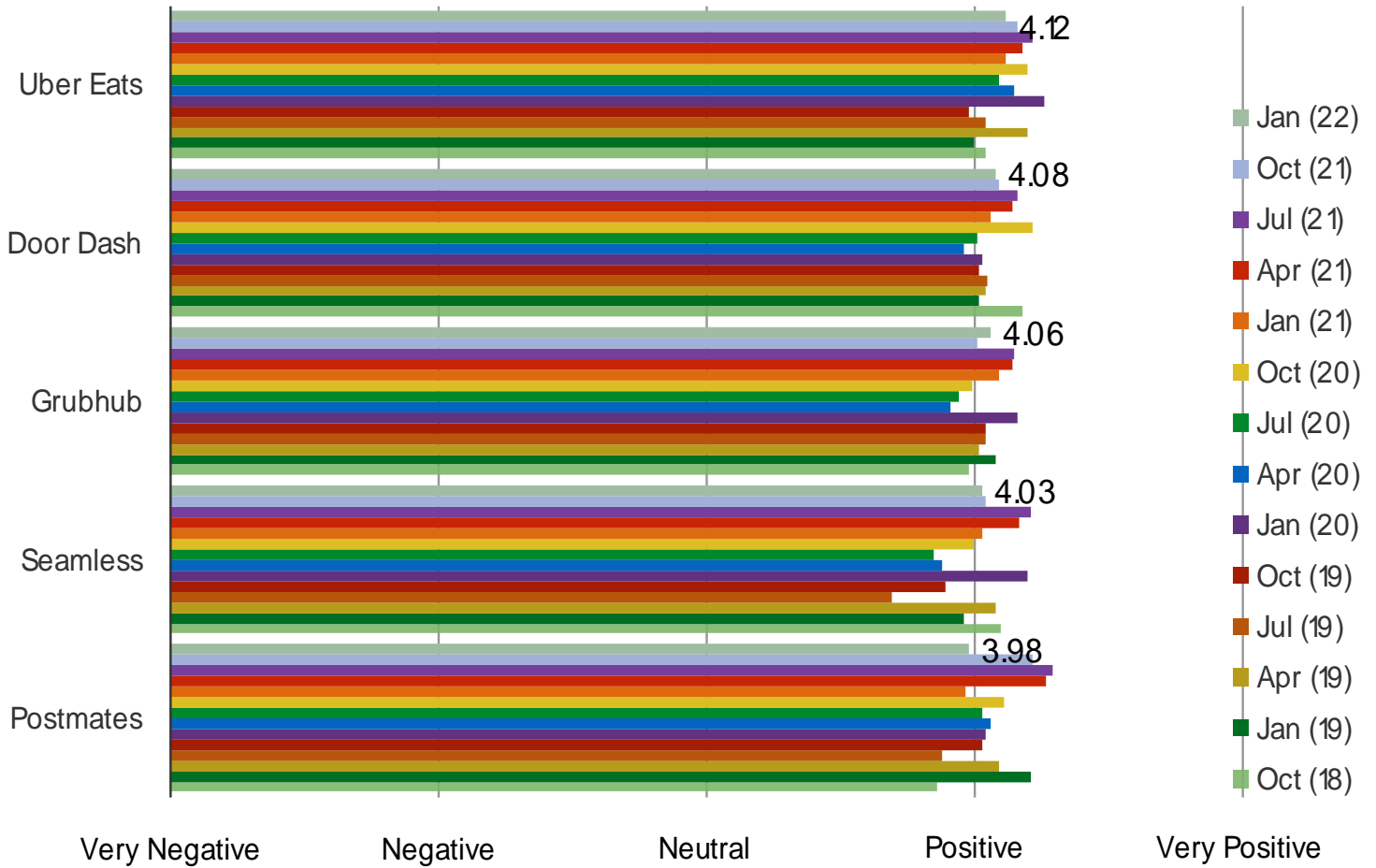
Food Delivery Apps

Audience: 1,000 US Consumers

Date: January 2022

WHAT IS YOUR OPINION OF THE PLATFORM?

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



	N =
Uber Eats	360
Door Dash	508
Seamless	91
Grubhub	297
Postmates	128

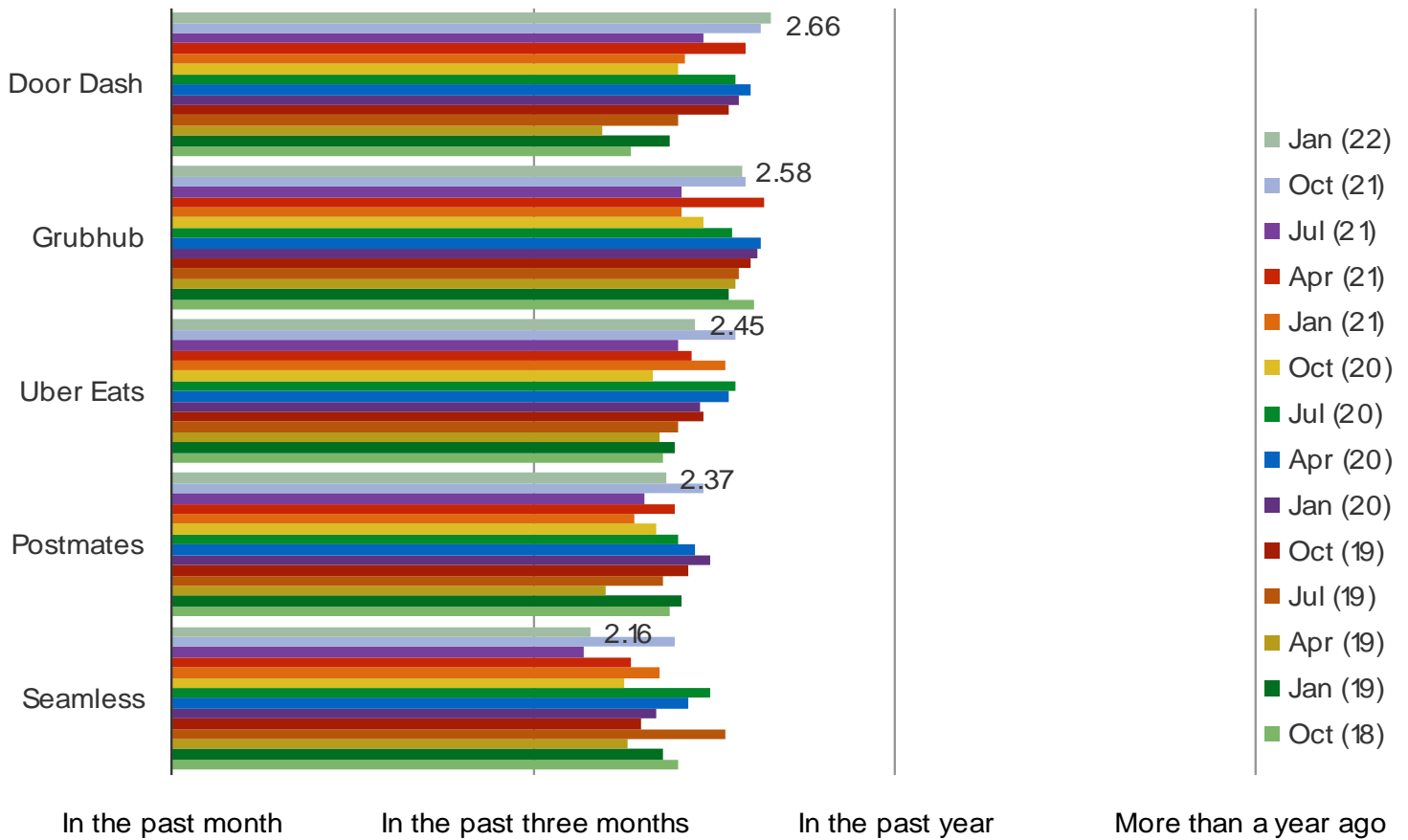


Food Delivery Apps

Audience: 1,000 US Consumers  
Date: January 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	360
Door Dash	508
Seamless	91
Grubhub	297
Postmates	128

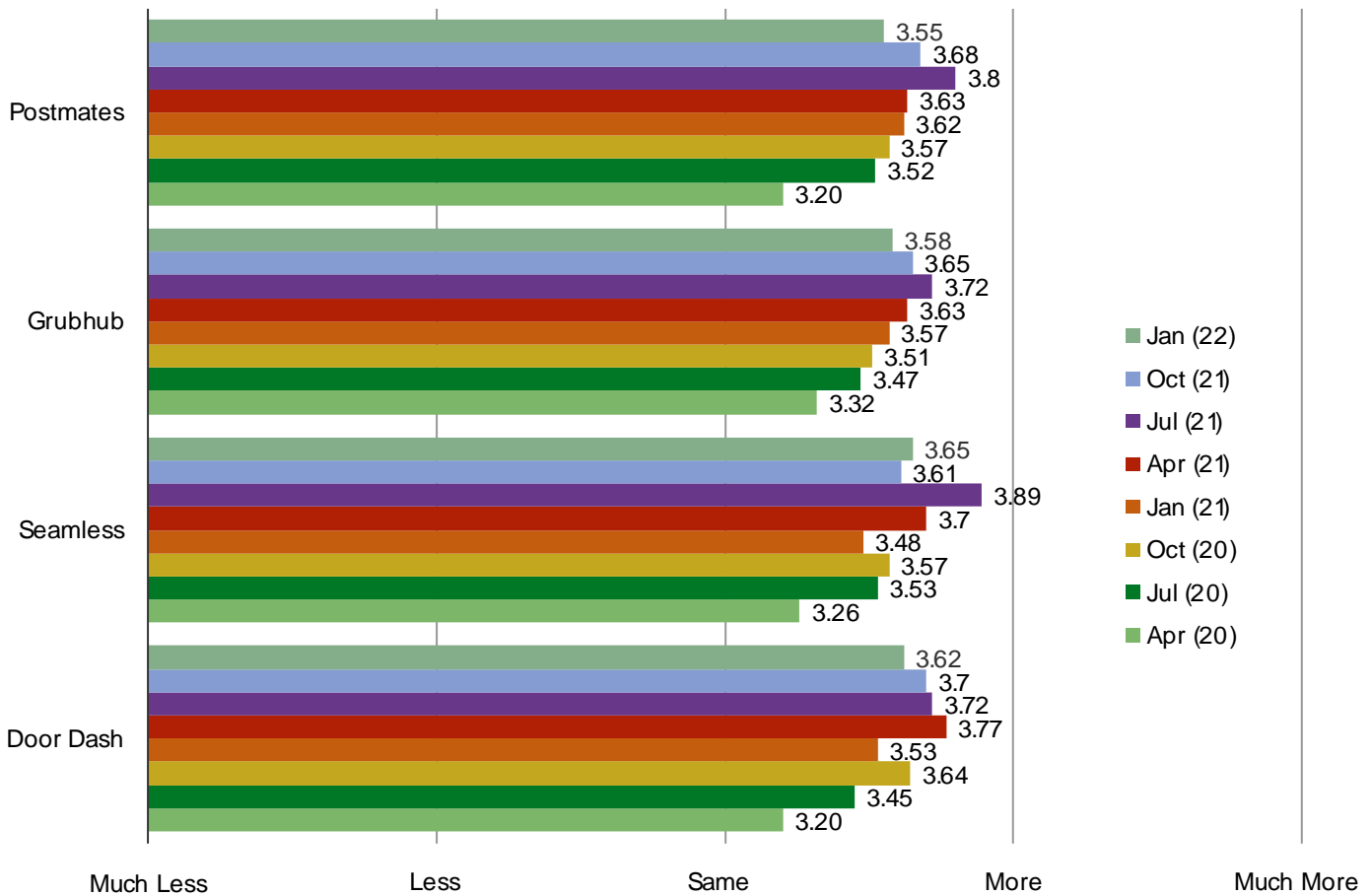
Food Delivery Apps

Audience: 1,000 US Consumers

Date: January 2022

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.



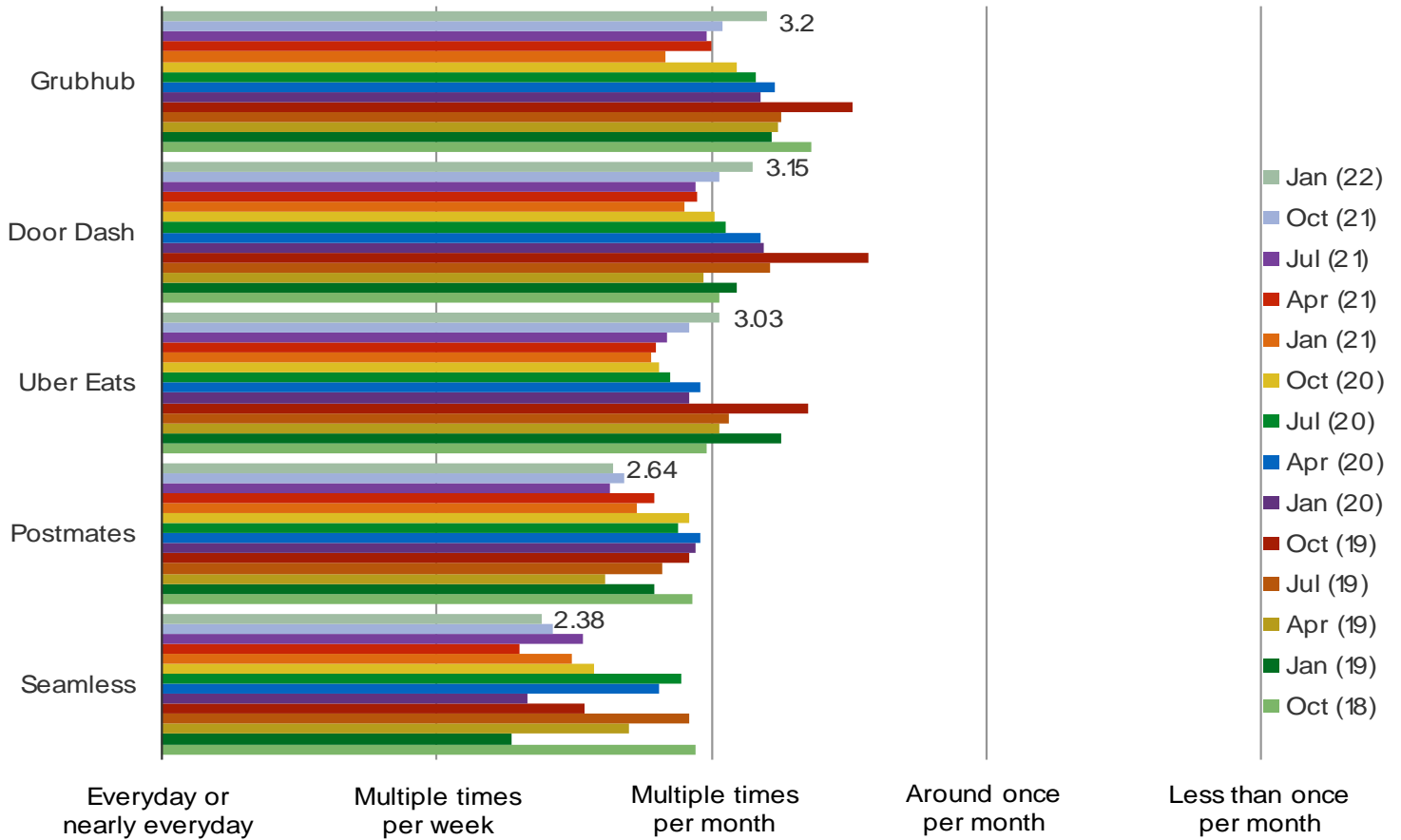
	N=
Uber Eats	391
Door Dash	525
Seamless	110
Grubhub	327
Postmates	96

Food Delivery Apps

Audience: 1,000 US Consumers  
Date: January 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

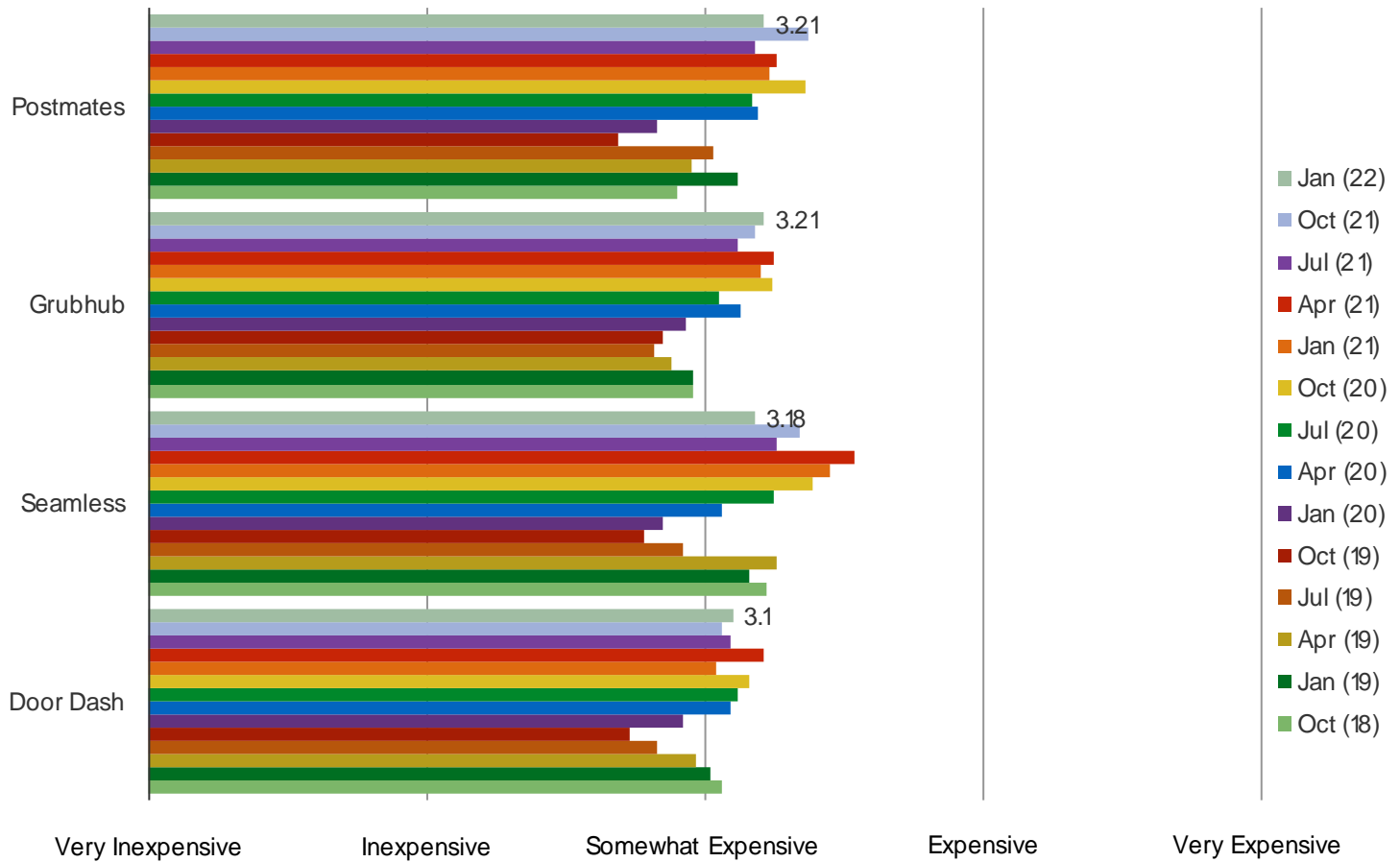
	N=
Uber Eats	360
Door Dash	508
Seamless	91
Grubhub	297
Postmates	128

Food Delivery Apps

Audience: 1,000 US Consumers  
Date: January 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	360
Door Dash	508
Seamless	91
Grubhub	297
Postmates	128

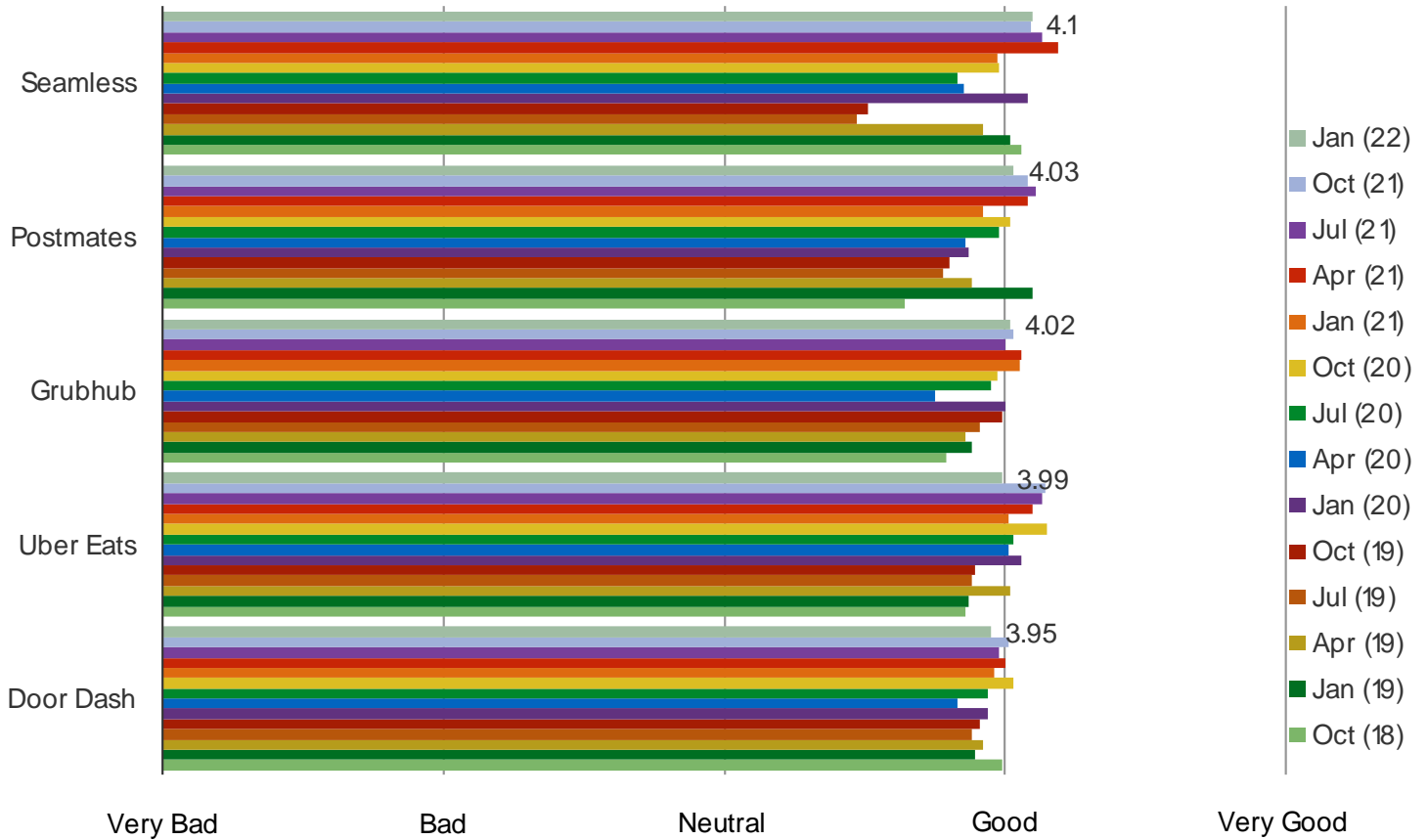
Food Delivery Apps

Audience: 1,000 US Consumers

Date: January 2022

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	360
Door Dash	508
Seamless	91
Grubhub	297
Postmates	128

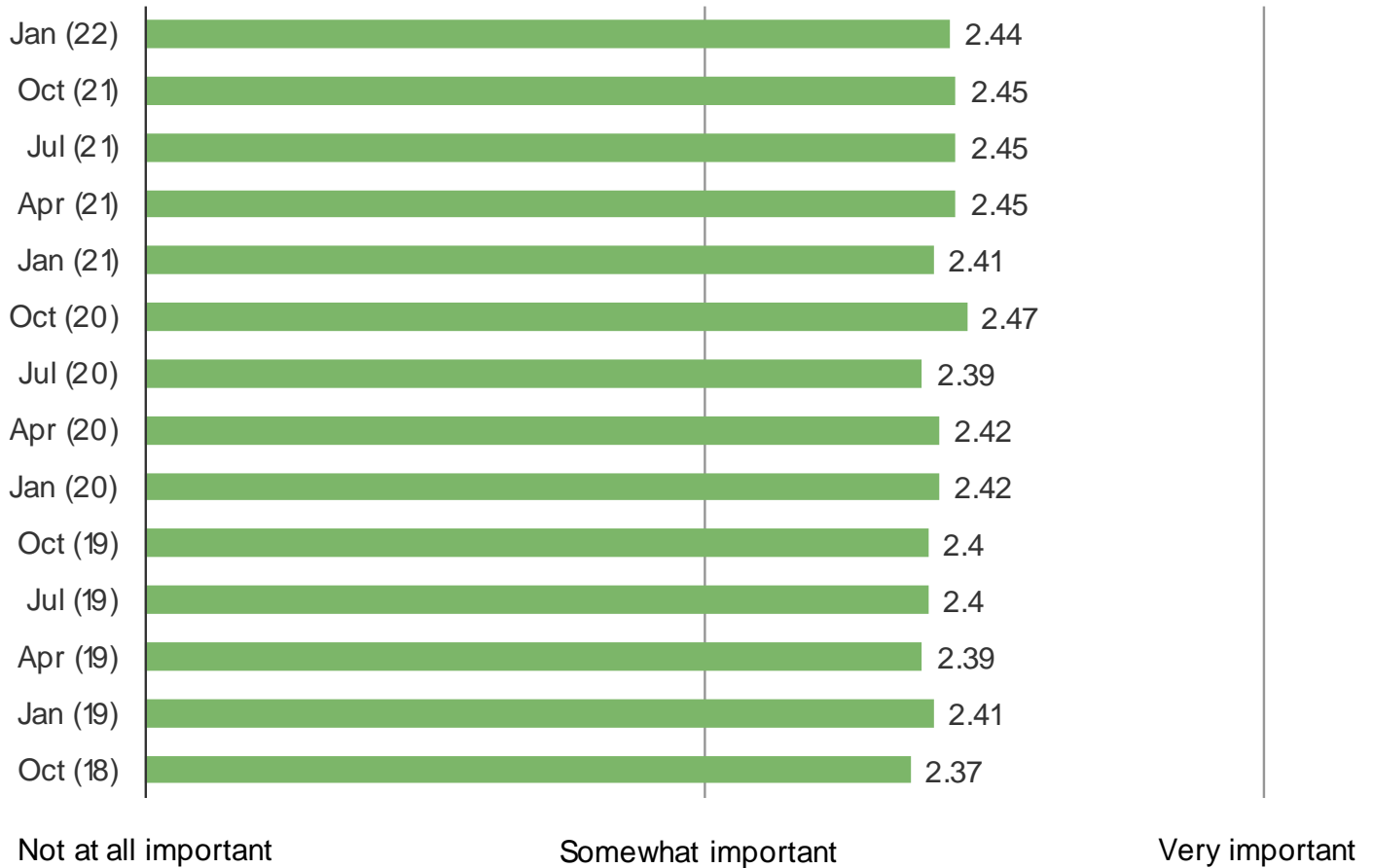
Food Delivery Apps

Audience: 1,000 US Consumers

Date: January 2022

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?

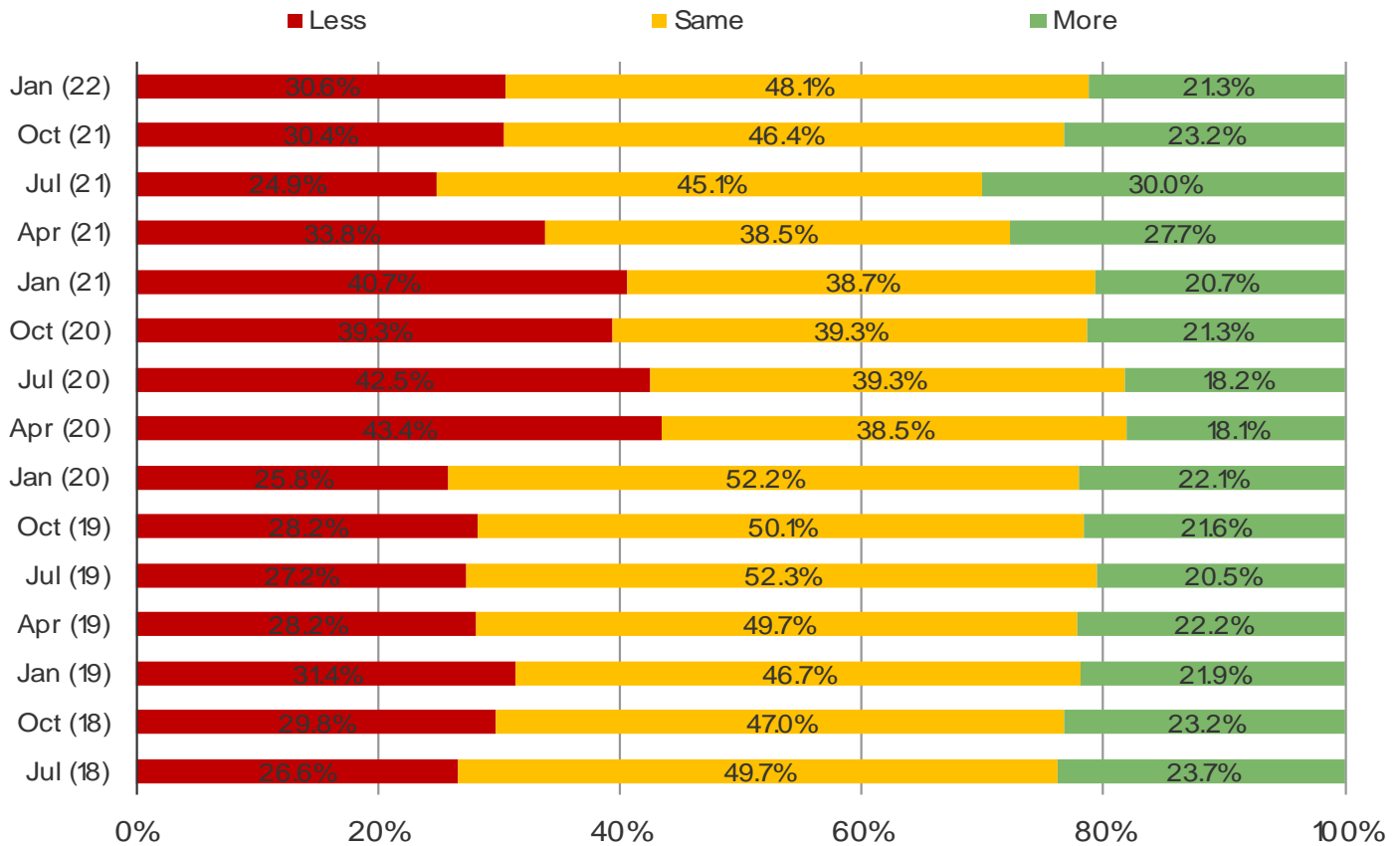
Posed to respondents who regularly or occasionally use each of the following apps.



## 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: January 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	N Size	Weighted Average
Shake Shack	17.8%	19.2%	32.9%	30.1%	73	2.75
Wingstop	26.1%	19.1%	27.0%	27.8%	115	2.57
Cheese Cake Factory	37.7%	17.2%	18.9%	26.2%	122	2.34
Chipotle	40.0%	12.6%	29.6%	17.8%	230	2.25
Papa John's	41.6%	11.3%	27.7%	19.3%	238	2.25
IHOP	40.4%	14.1%	29.3%	16.2%	198	2.21
Buffalo Wild Wings	38.8%	17.4%	30.3%	13.5%	178	2.19
Popeye's	45.5%	8.1%	29.6%	16.9%	308	2.18
Pizza Hut	46.5%	9.7%	24.1%	19.8%	424	2.17
Chili's	45.1%	10.4%	28.0%	16.6%	193	2.16
Red Robbin	45.3%	13.2%	23.6%	17.9%	106	2.14
Longhorn Steakhouse	48.0%	10.6%	24.4%	17.1%	123	2.11
Starbucks	51.1%	11.0%	15.8%	22.1%	317	2.09
KFC	49.6%	12.0%	20.8%	17.7%	452	2.07
Appleby's	50.3%	11.1%	23.2%	15.5%	181	2.04
Chick-fil-A	52.0%	11.0%	22.4%	14.7%	429	2
Dunkin Donuts	55.5%	7.1%	21.8%	15.6%	326	1.98
Panera	51.3%	11.7%	24.4%	12.6%	230	1.98
Sonic	54.4%	9.2%	21.0%	15.4%	272	1.97
McDonald's	53.9%	11.6%	19.8%	14.7%	844	1.95
Olive Garden	57.0%	8.4%	21.3%	13.3%	263	1.91
Taco Bell	59.0%	8.4%	19.4%	13.1%	571	1.87
Wendy's	59.5%	8.5%	21.6%	10.4%	556	1.83
Burger King	59.6%	10.9%	16.5%	13.0%	577	1.83
Texas Roadhouse	61.3%	7.8%	22.6%	8.3%	204	1.78
Cracker Barrel	62.8%	10.0%	15.2%	12.0%	191	1.76

Food Delivery Apps

Audience: 1,000 US Consumers  
Date: January 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
Chili's	51.2%	48.8%	86
Cheese Cake Factory	49.1%	50.9%	55
Appleby's	48.6%	51.4%	70
Buffalo Wild Wings	47.4%	52.6%	78
Texas Roadhouse	46.0%	54.0%	63
Shake Shack	45.7%	54.4%	46
Wingstop	42.9%	57.1%	63
Cracker Barrel	42.3%	57.7%	52
Starbucks	40.8%	59.2%	120
Olive Garden	39.6%	60.4%	91
Dunkin Donuts	39.3%	60.7%	122
Pizza Hut	39.3%	60.8%	186
IHOP	36.7%	63.3%	90
Popeye's	35.7%	64.3%	143
Longhorn Steakhouse	35.3%	64.7%	51
Burger King	35.3%	64.7%	170
Chick-fil-A	35.2%	64.8%	159
Papa John's	34.8%	65.2%	112
Chipotle	33.9%	66.1%	109
Taco Bell	33.3%	66.7%	186
KFC	33.3%	66.7%	174
McDonald's	33.0%	67.0%	291
Wendy's	32.0%	68.0%	178
Red Robbin	31.8%	68.2%	44
Panera	31.8%	68.2%	85
Sonic	26.3%	73.7%	99

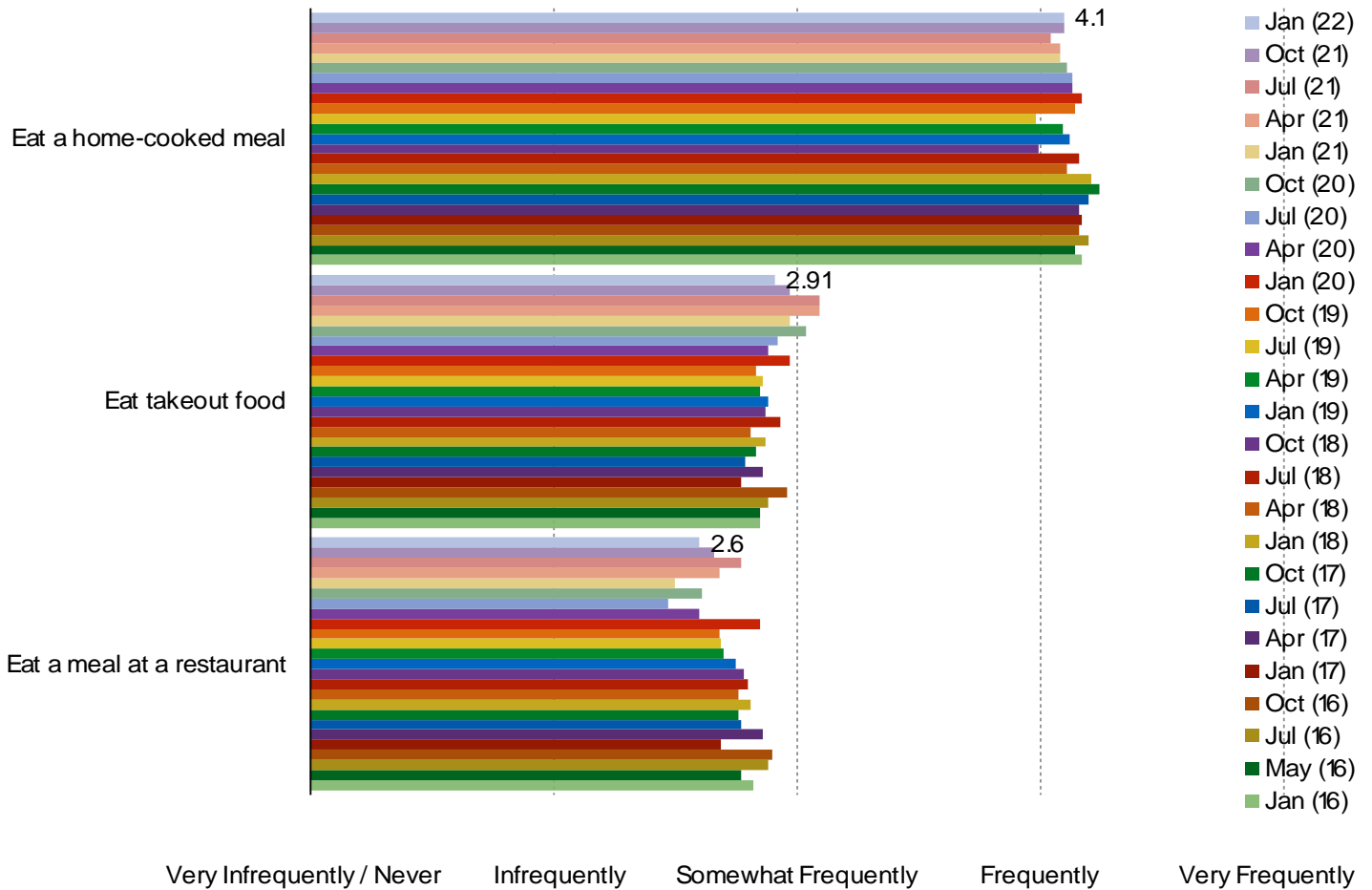
## CASUAL DINING OVERALL

Food Delivery Apps

Audience: 1,000 US Consumers  
Date: January 2022

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.

