

BESPOKE SURVEYS

## Food Delivery Vol 23

1500+ US Consumers Balanced to Census

**CHECK BREAKDOWN:****FOOD DELIVERY USAGE**

Food delivery usage overall has softened a touch in recent months. Usage remains well above pre-covid levels, but it has regressed a bit from peak usage during Covid.

**ADOPTION DYNAMICS**

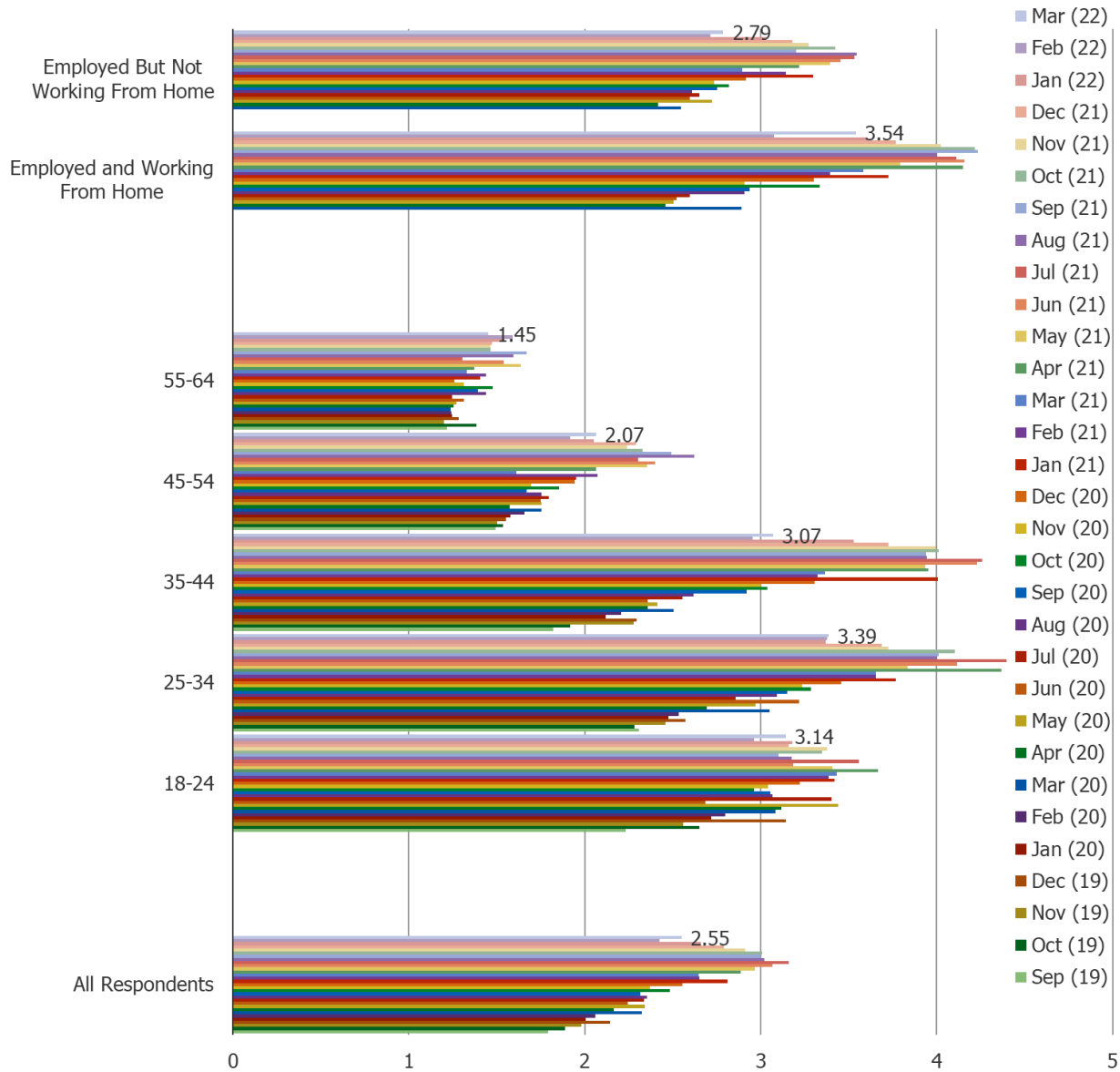
Adoption of food delivery apps accelerated during the pandemic, but have been flatter across age demographics in recent months. Younger respondents and those who are employed and working from home have been drivers of food delivery adoption.

**DOORDASH VS COMPETITORS**

DoorDash continues to command the top spot when it comes to overall awareness, app downloads, and total usage. Overall opinions of the platforms we ask about are positive and roughly in-line with each other, but DoorDash slightly beats out key competitors.

## ADOPTION CURVES: BY AGE AND WFH

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



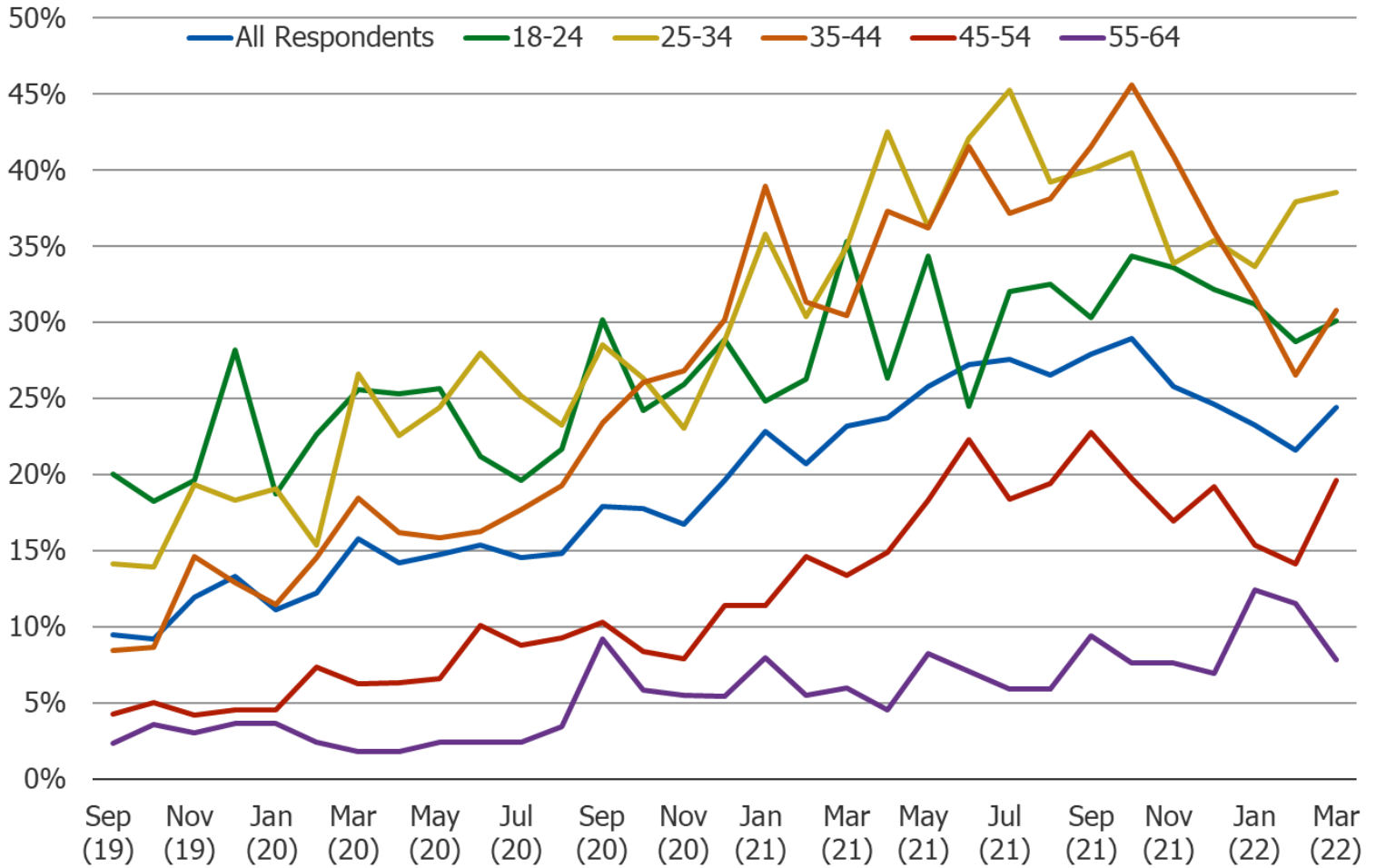
Weighted Average Calculation:

- 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: April 2022

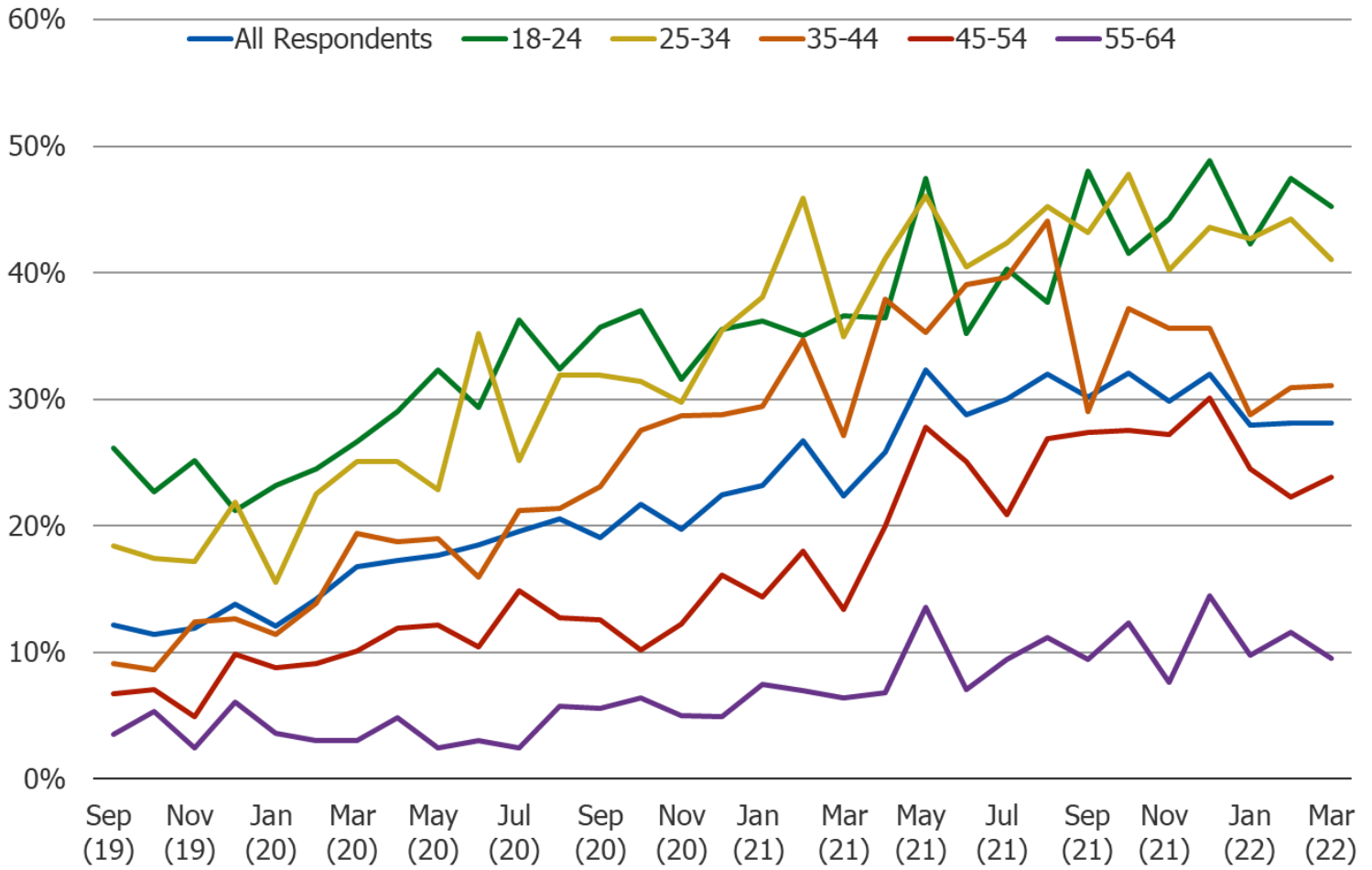
ADOPTION CURVE BY AGE – UBER EATS (REGULARLY OR OCCASIONALLY USES PLATFORM)



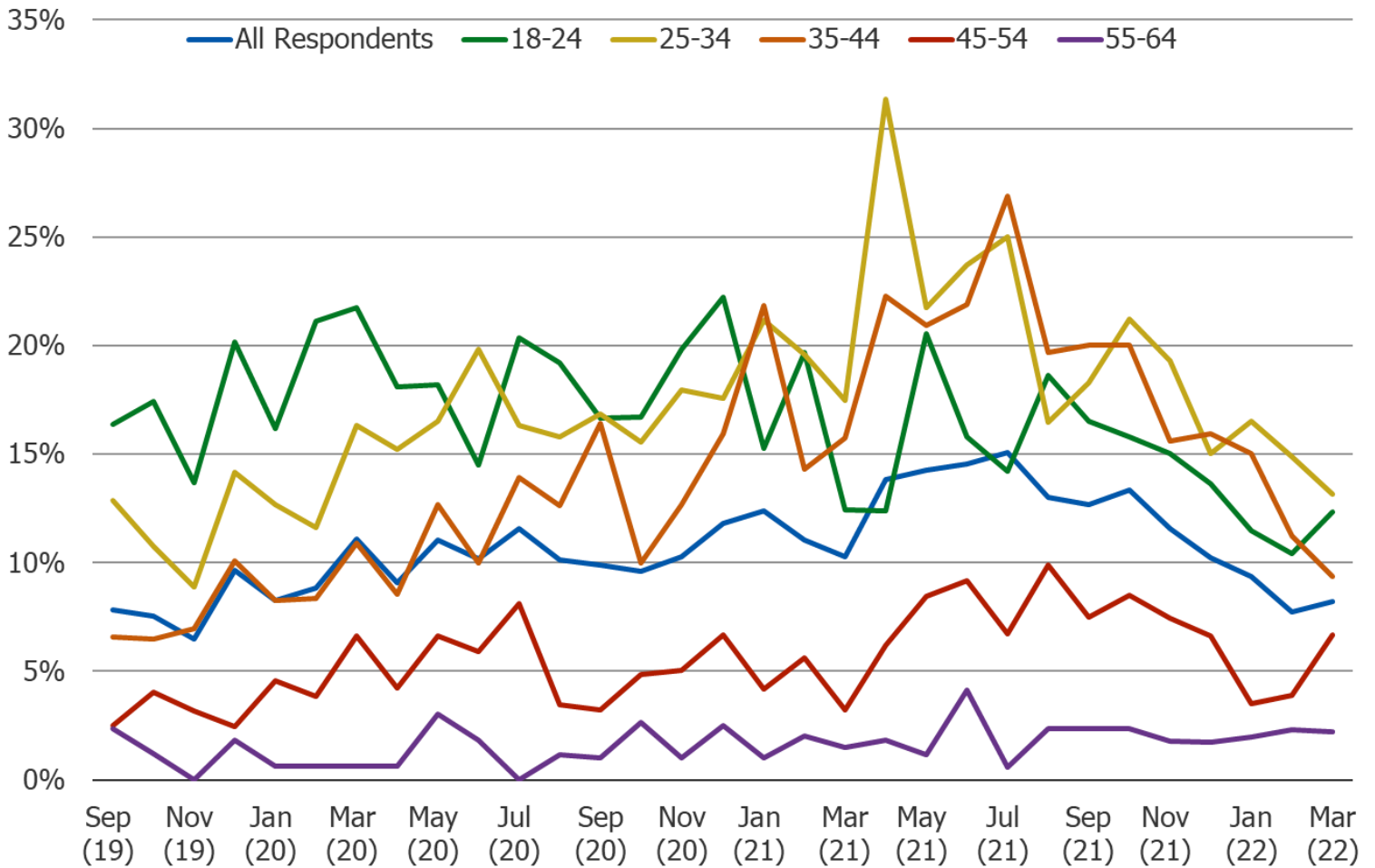
Food Delivery Apps

Audience: 1,000 US Consumers  
Date: April 2022

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



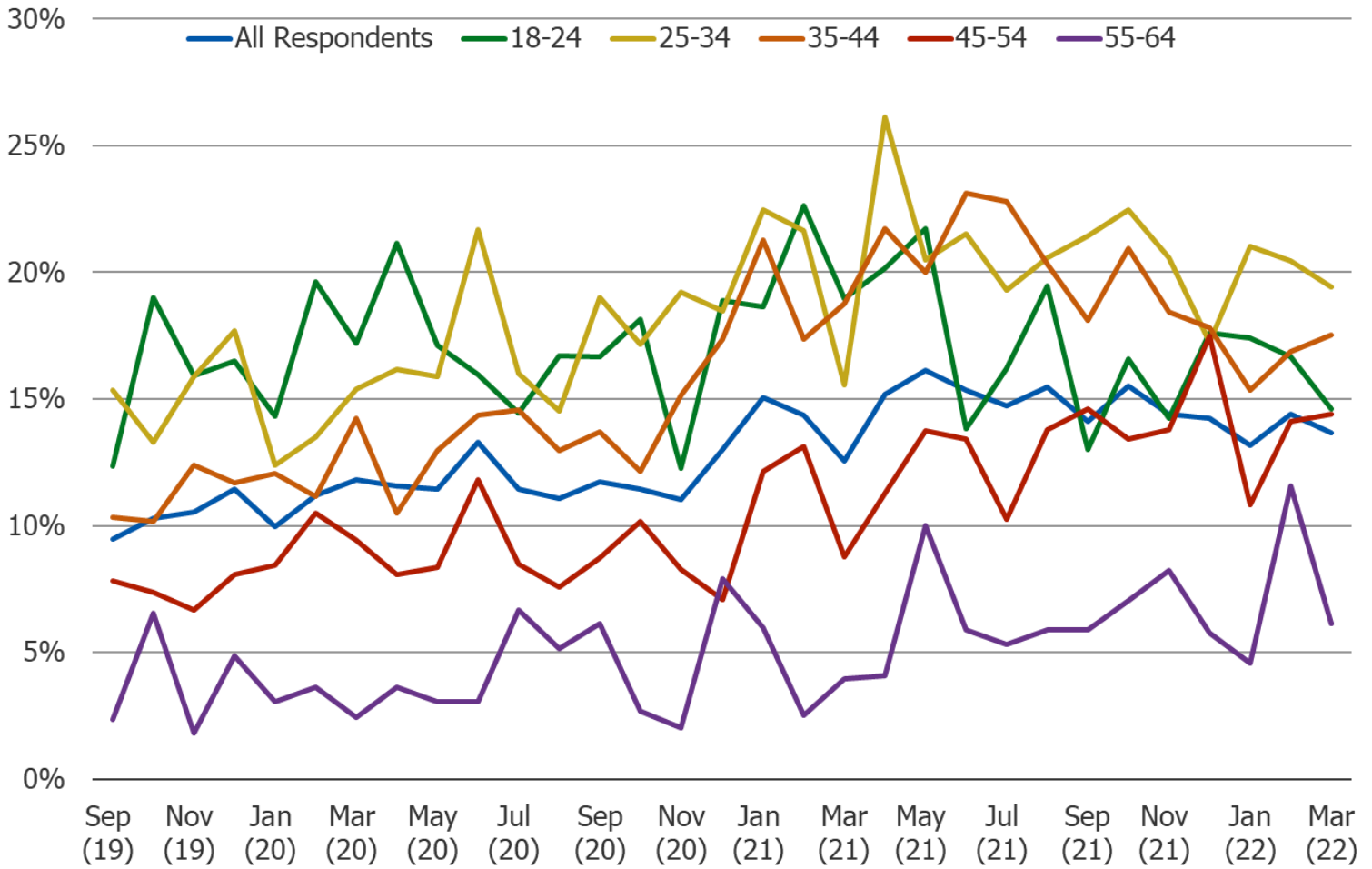
ADOPTION CURVE BY AGE – POSTMATES (REGULARLY OR OCCASIONALLY USES PLATFORM)



Food Delivery Apps

Audience: 1,000 US Consumers  
Date: April 2022

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

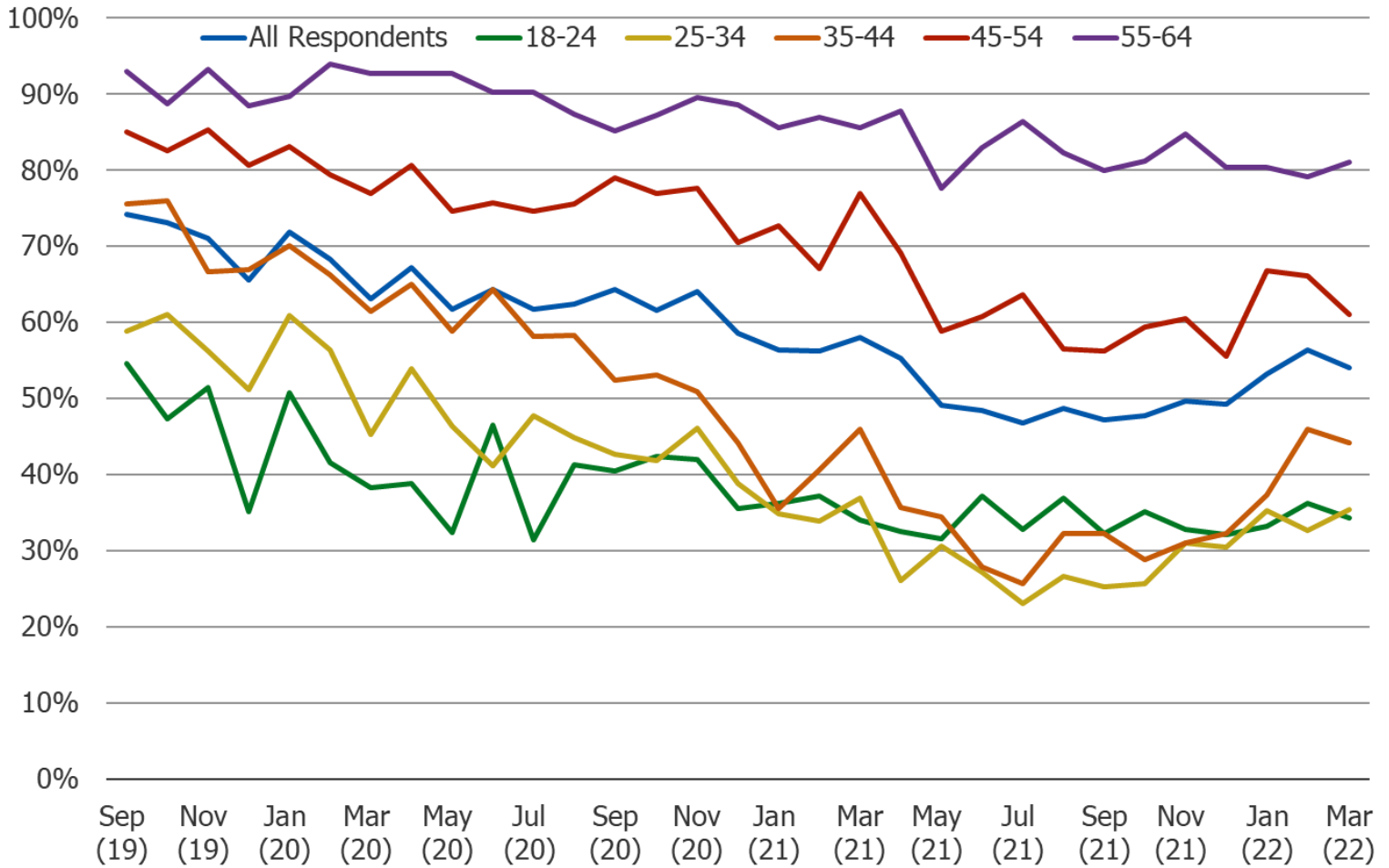




Food Delivery Apps

Audience: 1,000 US Consumers  
Date: April 2022

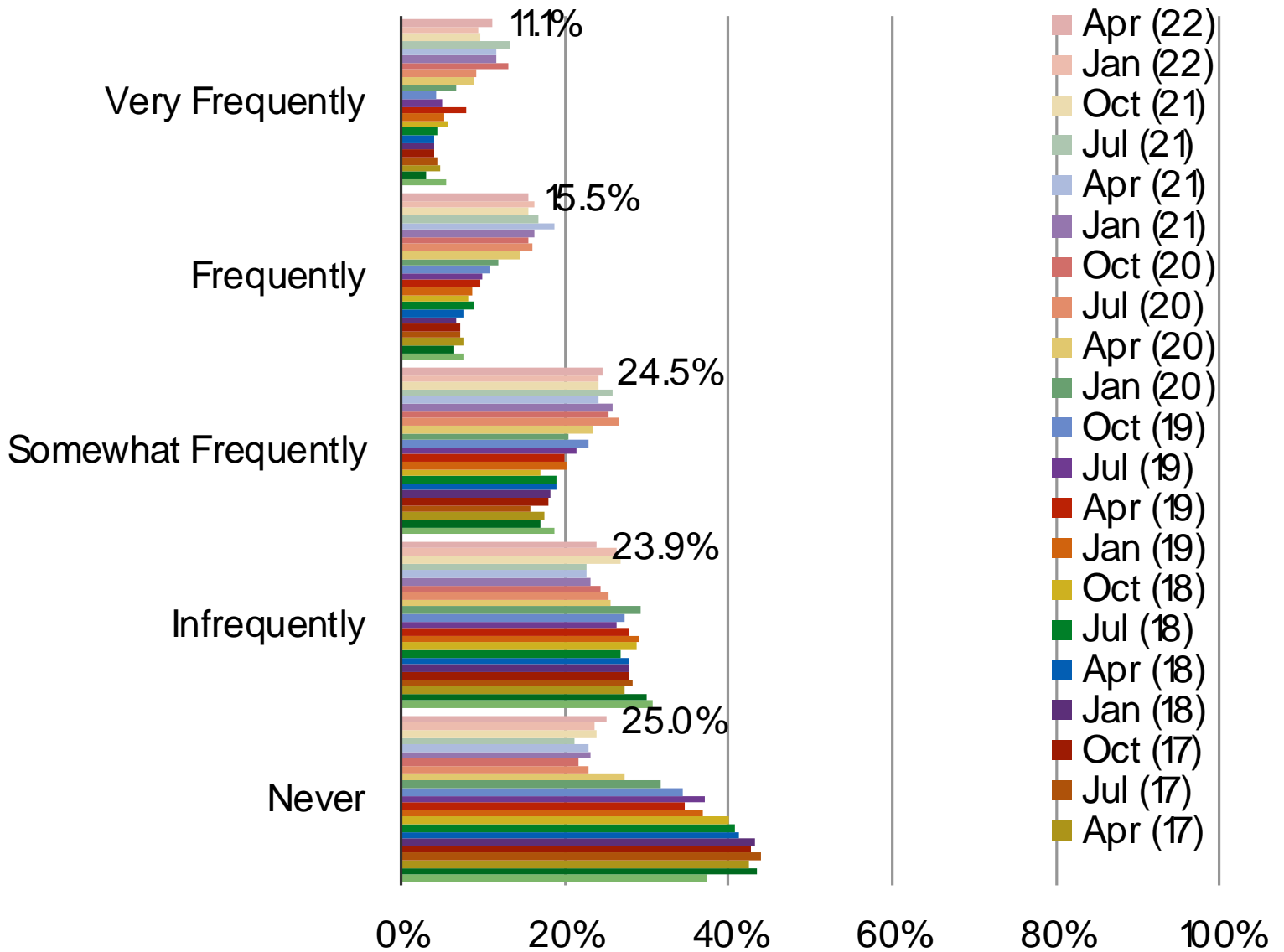
ADOPTION CURVE BY AGE –REGULARLY OR OCCASIONALLY USES NONE OF THE ABOVE PLATFORMS (OPTIONS SHOWN INCLUDE UBER EATS, DOOR DASH, POSTMATES, GRUBHUB, AND SEAMLESS)



## USAGE TRENDS AND SENTIMENT READINGS

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

Posed to all respondents.



N = 1520

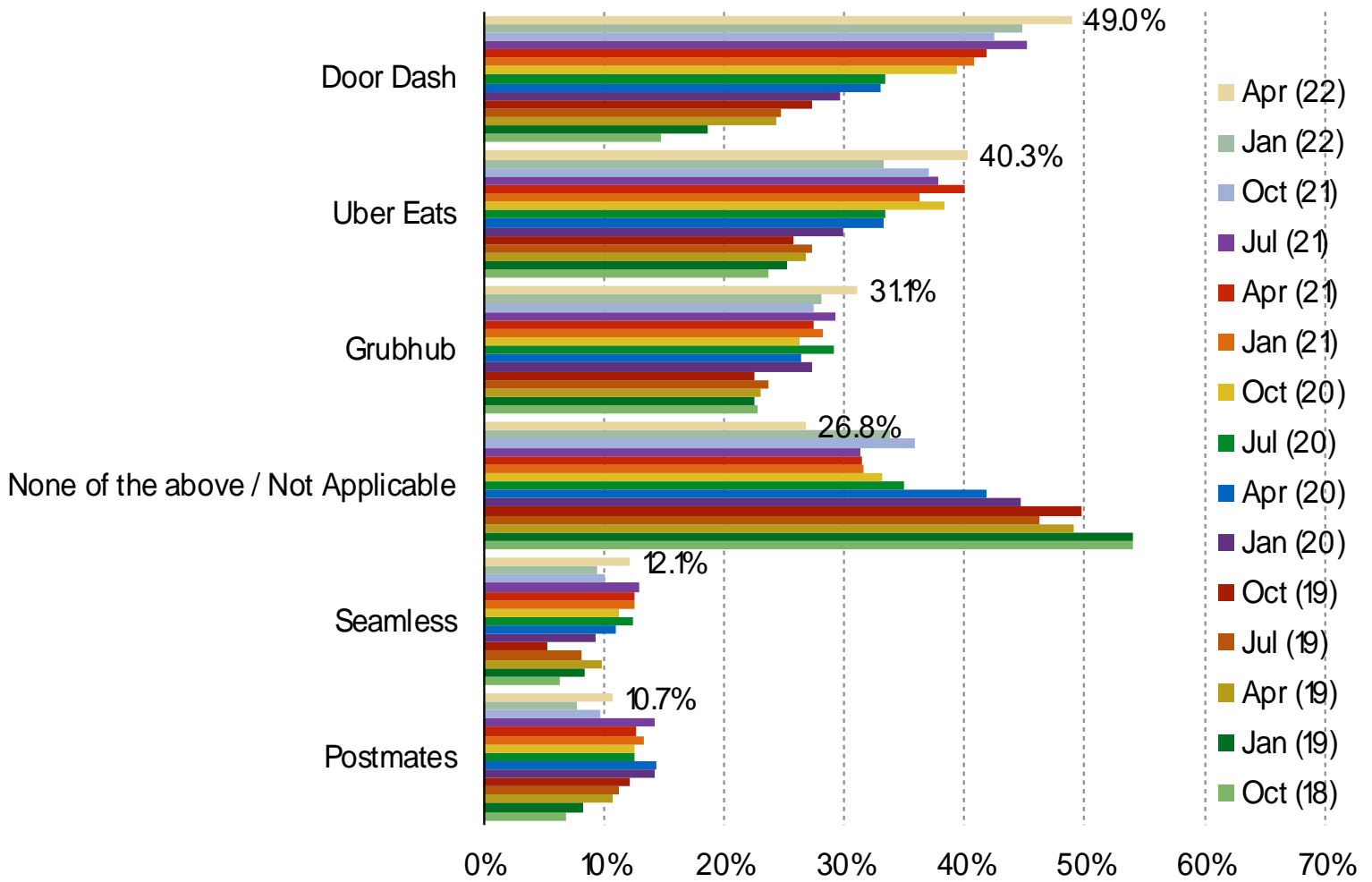
Food Delivery Apps

Audience: 1,000 US Consumers

Date: April 2022

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

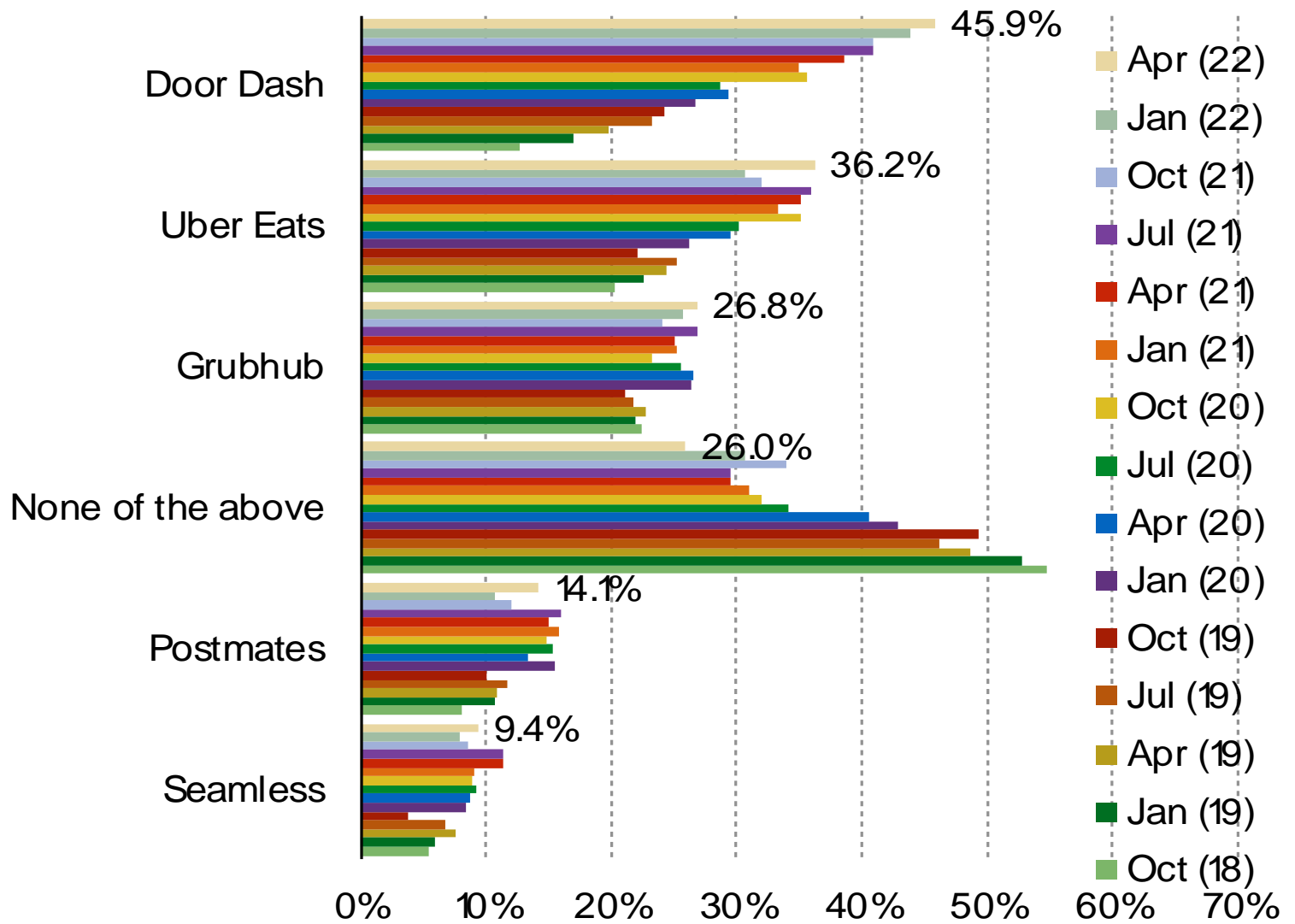
Posed to respondents who use food delivery apps.



N = 1140

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 = 1140

Food Delivery Apps

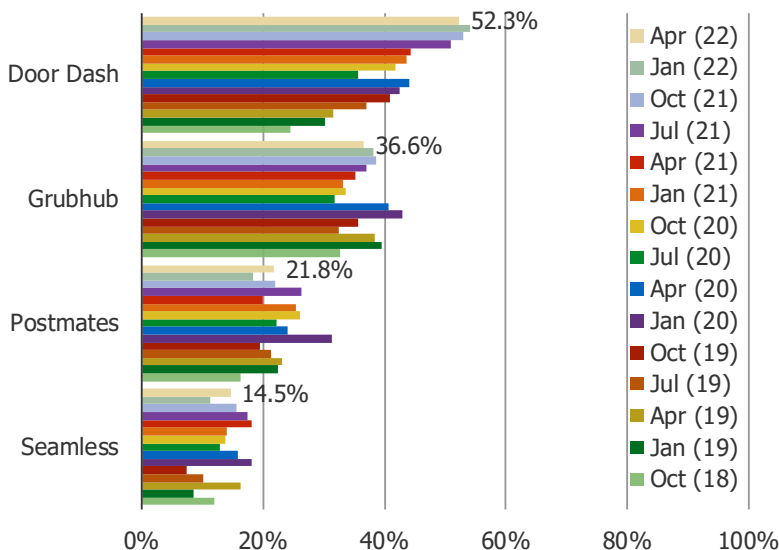
Audience: 1,000 US Consumers

Date: April 2022

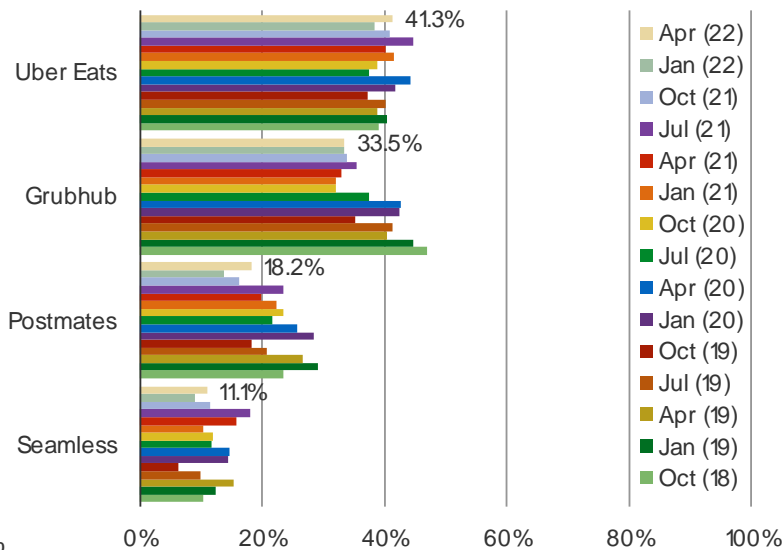
CROSS-OVER: REGULARLY OR OCCASIONALLY USES EACH OF THE FOLLOWING, WHAT OTHER PLATFORMS DO THEY ALSO USE REGULARLY OR OCCASIONALLY?

Posed to respondents who use food delivery apps.

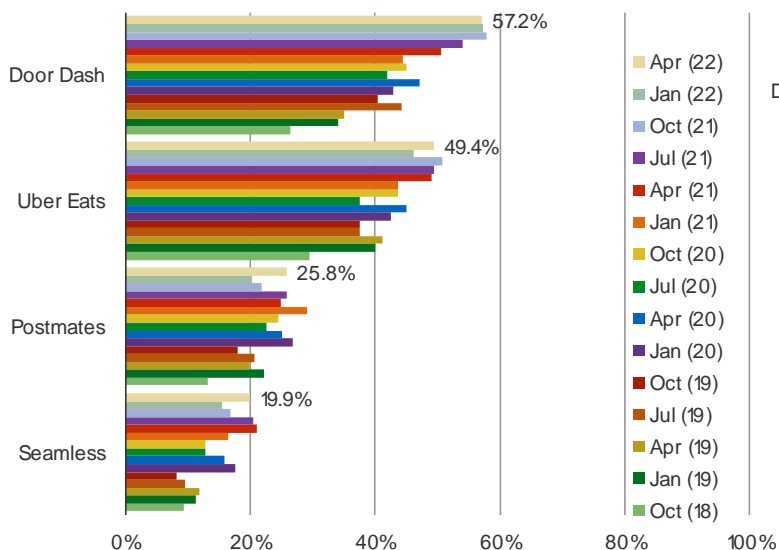
Uber Eats Users Also Use



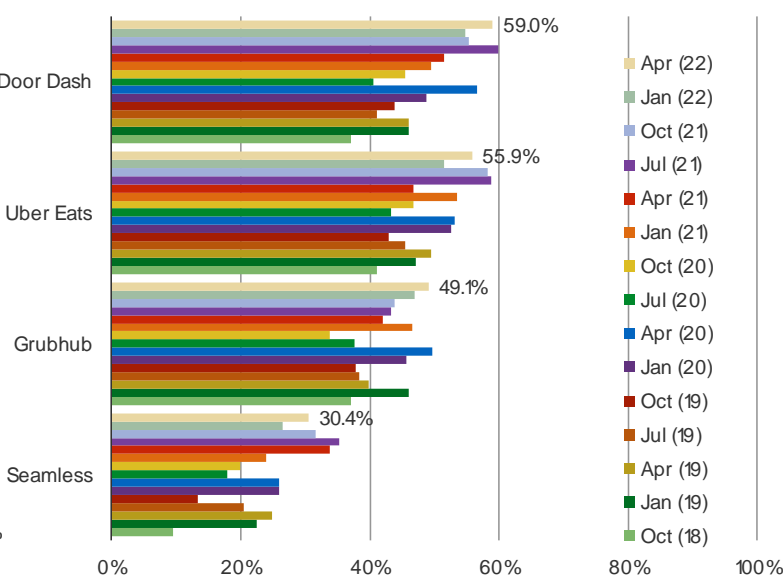
Door Dash Users Also Use



GrubHub Users Also Use



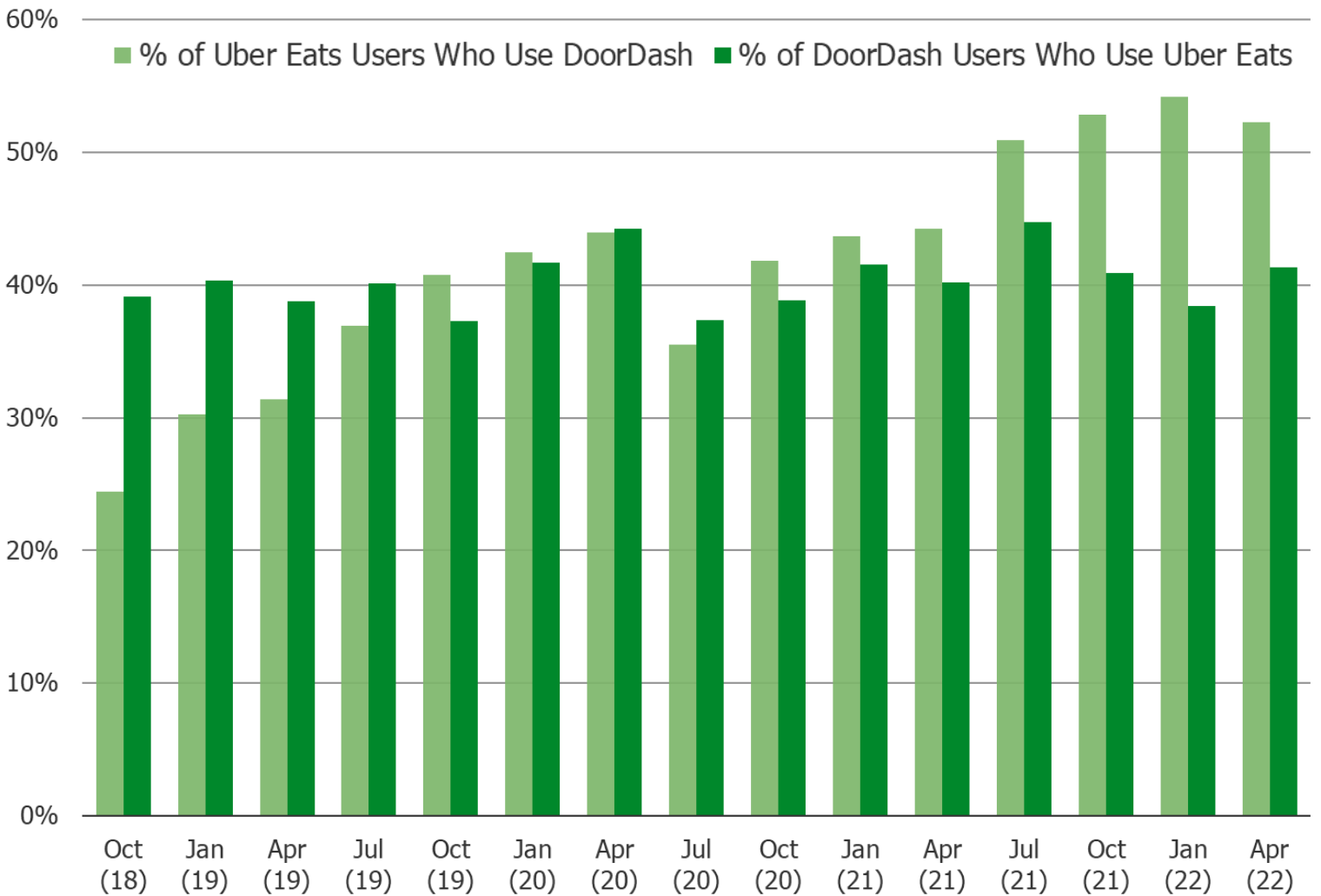
Postmates Users Also Use



	N=
Uber Eats	413
Door Dash	523
Seamless	107
Grubhub	306
Postmates	161

CROSS-OVER BETWEEN DOORDASH AND UBER EATS USER BASES

Posed to respondents who use food delivery apps.



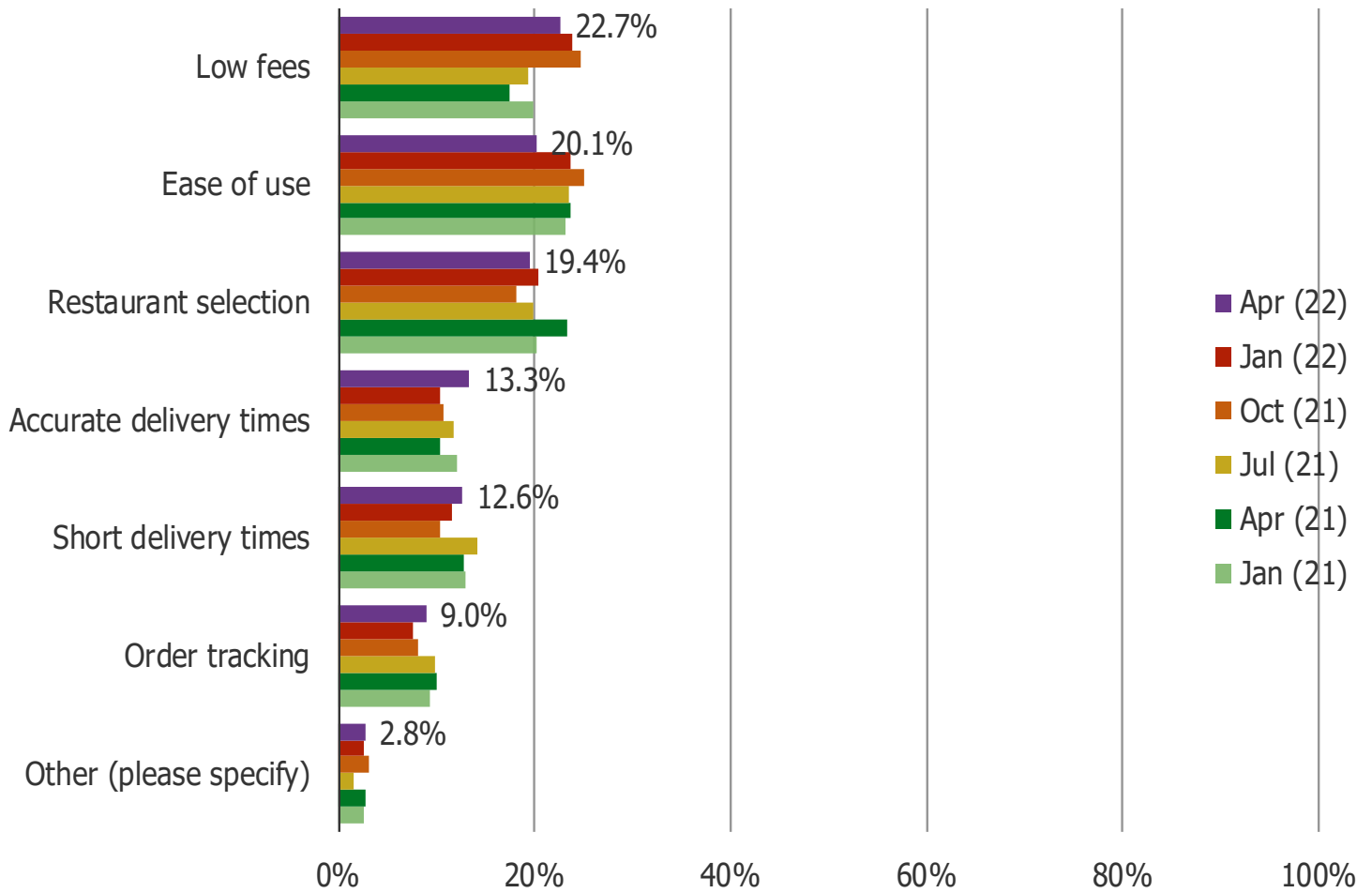
Food Delivery Apps

Audience: 1,000 US Consumers

Date: April 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



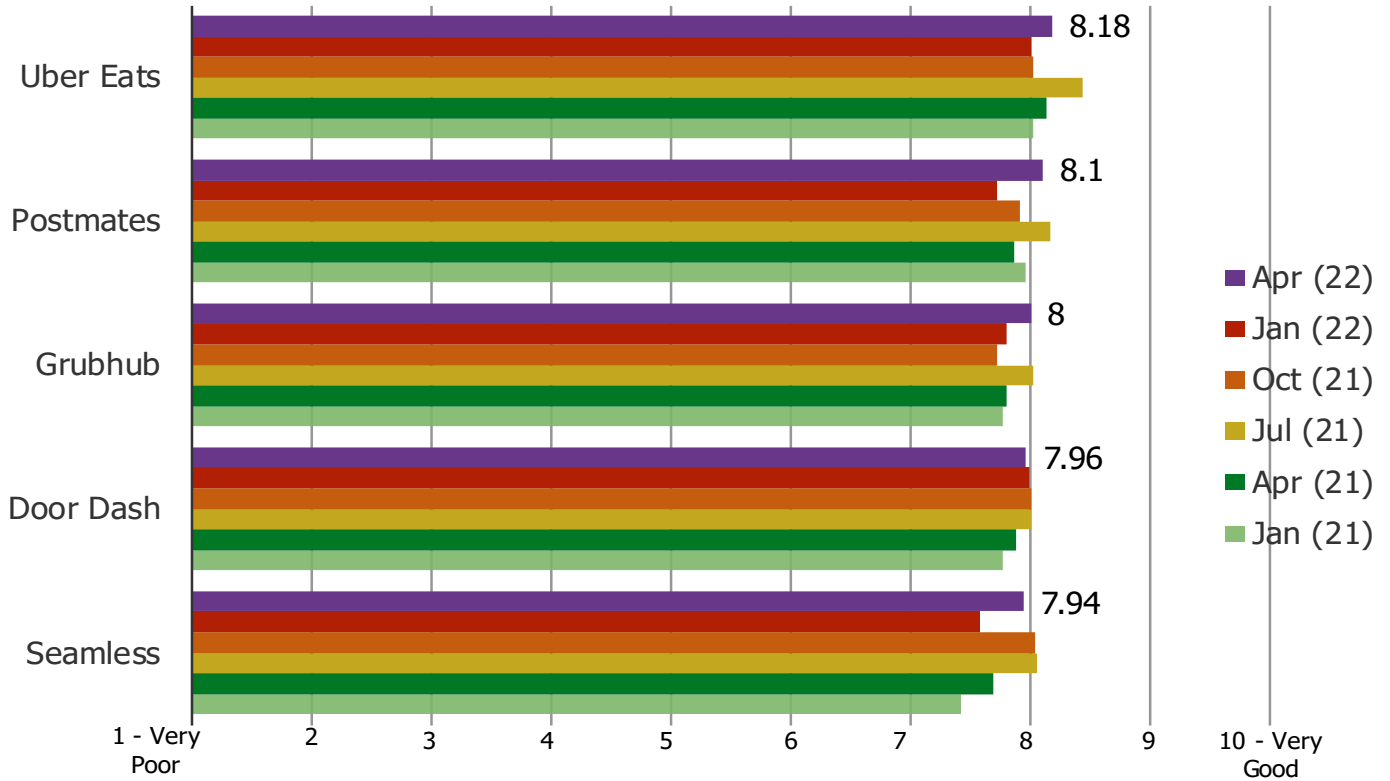
Food Delivery Apps

Audience: 1,000 US Consumers

Date: April 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.



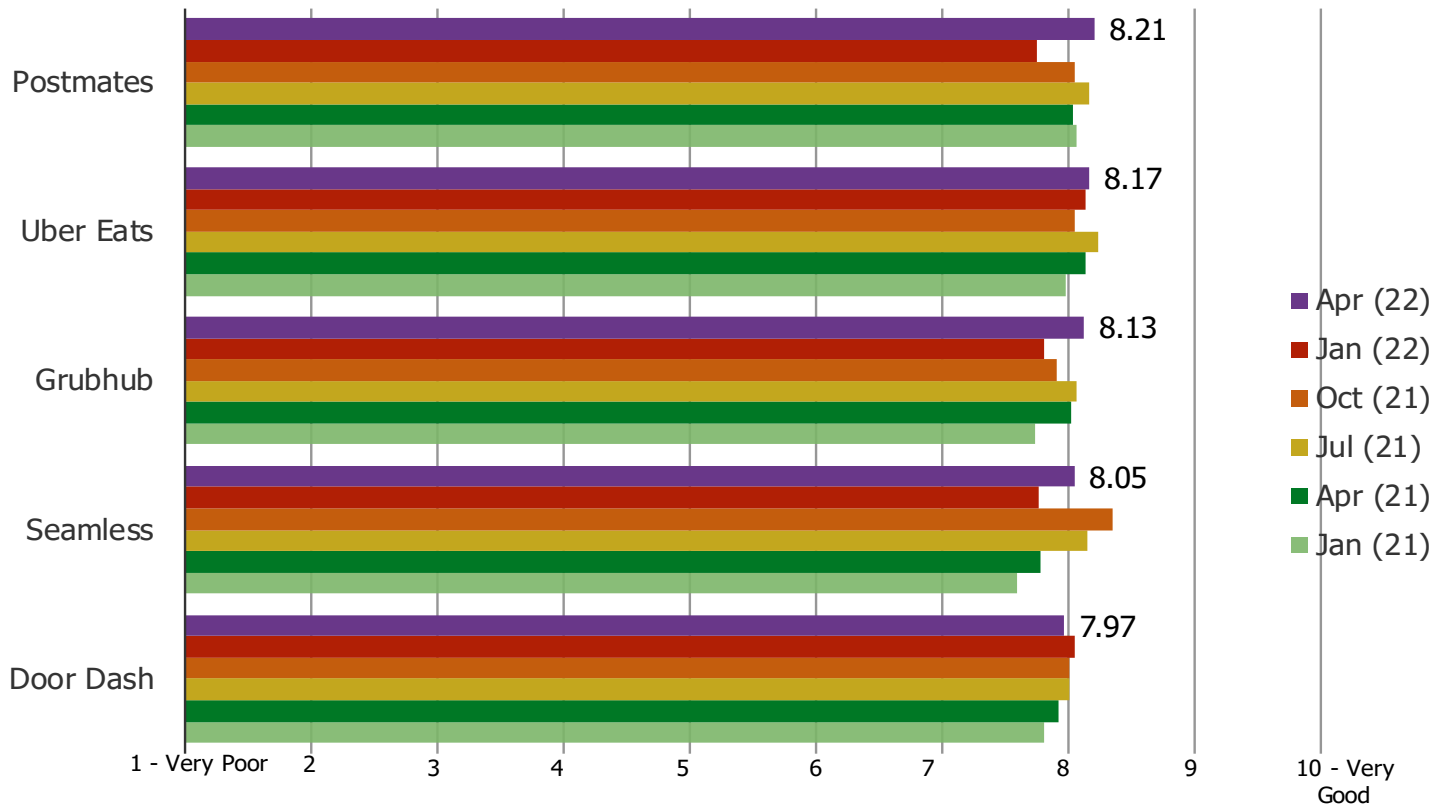
	N=
Uber Eats	459
Door Dash	558
Seamless	138
Grubhub	355
Postmates	122

Food Delivery Apps

Audience: 1,000 US Consumers  
Date: April 2022

PLEASE RATE THE FOLLOWING WHEN IT COMES TO RESTAURANT SELECTION:

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



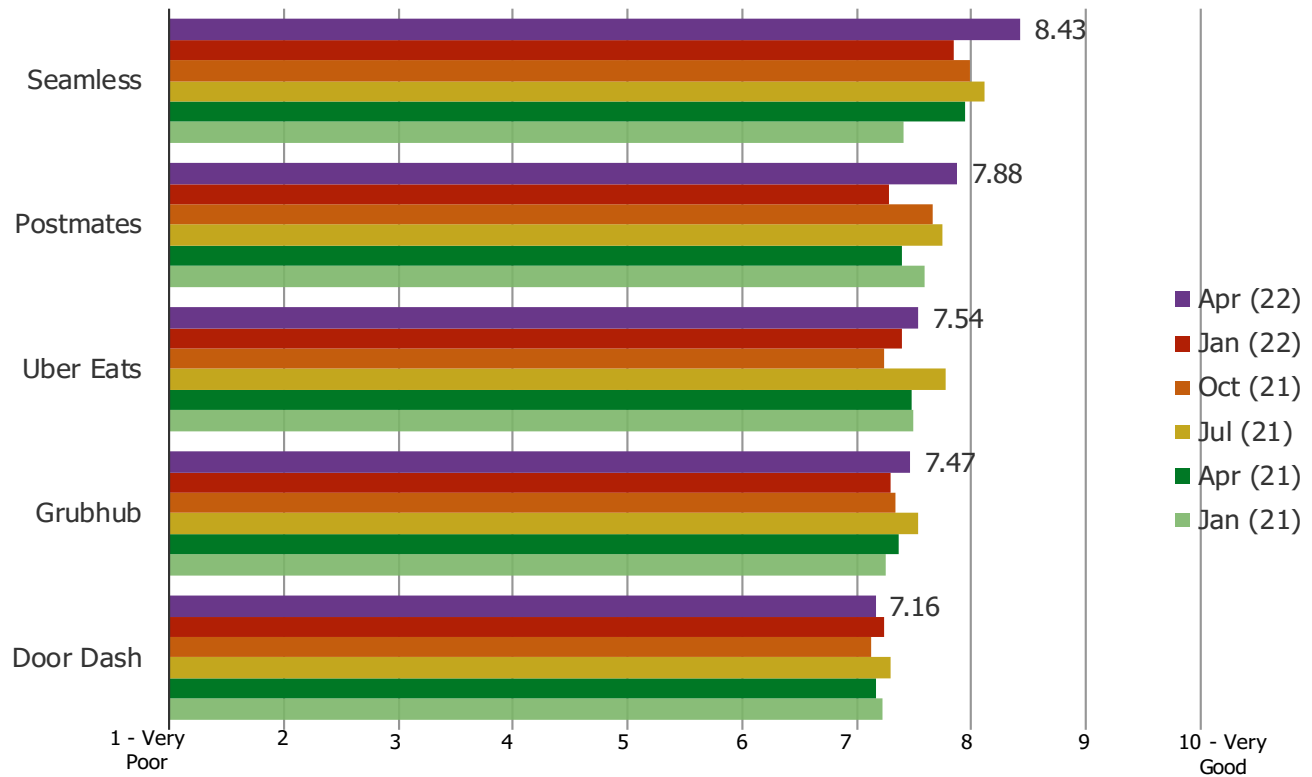
	N=
Uber Eats	459
Door Dash	558
Seamless	138
Grubhub	355
Postmates	122

Food Delivery Apps

Audience: 1,000 US Consumers  
Date: April 2022

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

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



	N=
Uber Eats	459
Door Dash	558
Seamless	138
Grubhub	355
Postmates	122

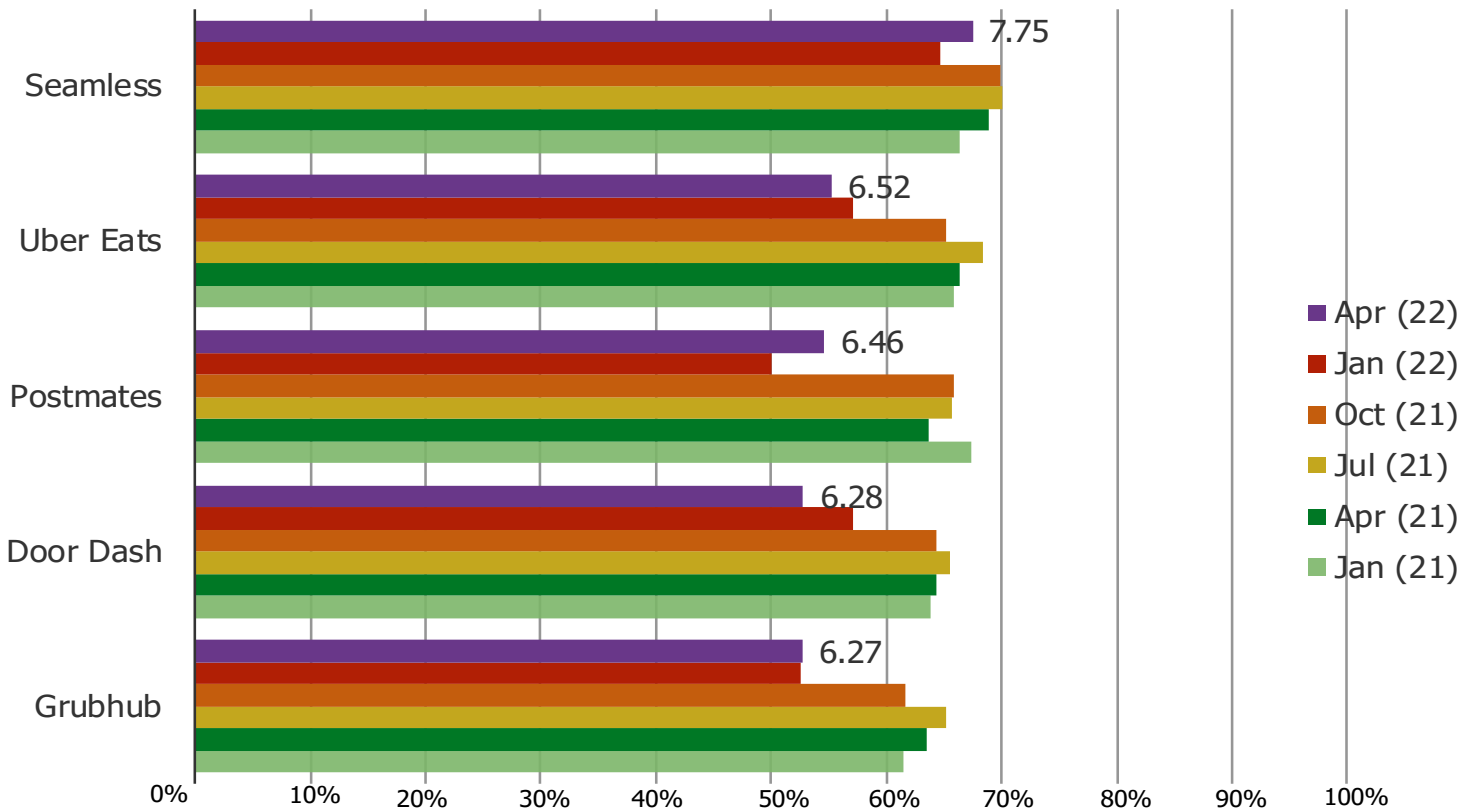
Food Delivery Apps

Audience: 1,000 US Consumers

Date: April 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	459
Door Dash	558
Seamless	138
Grubhub	355
Postmates	122

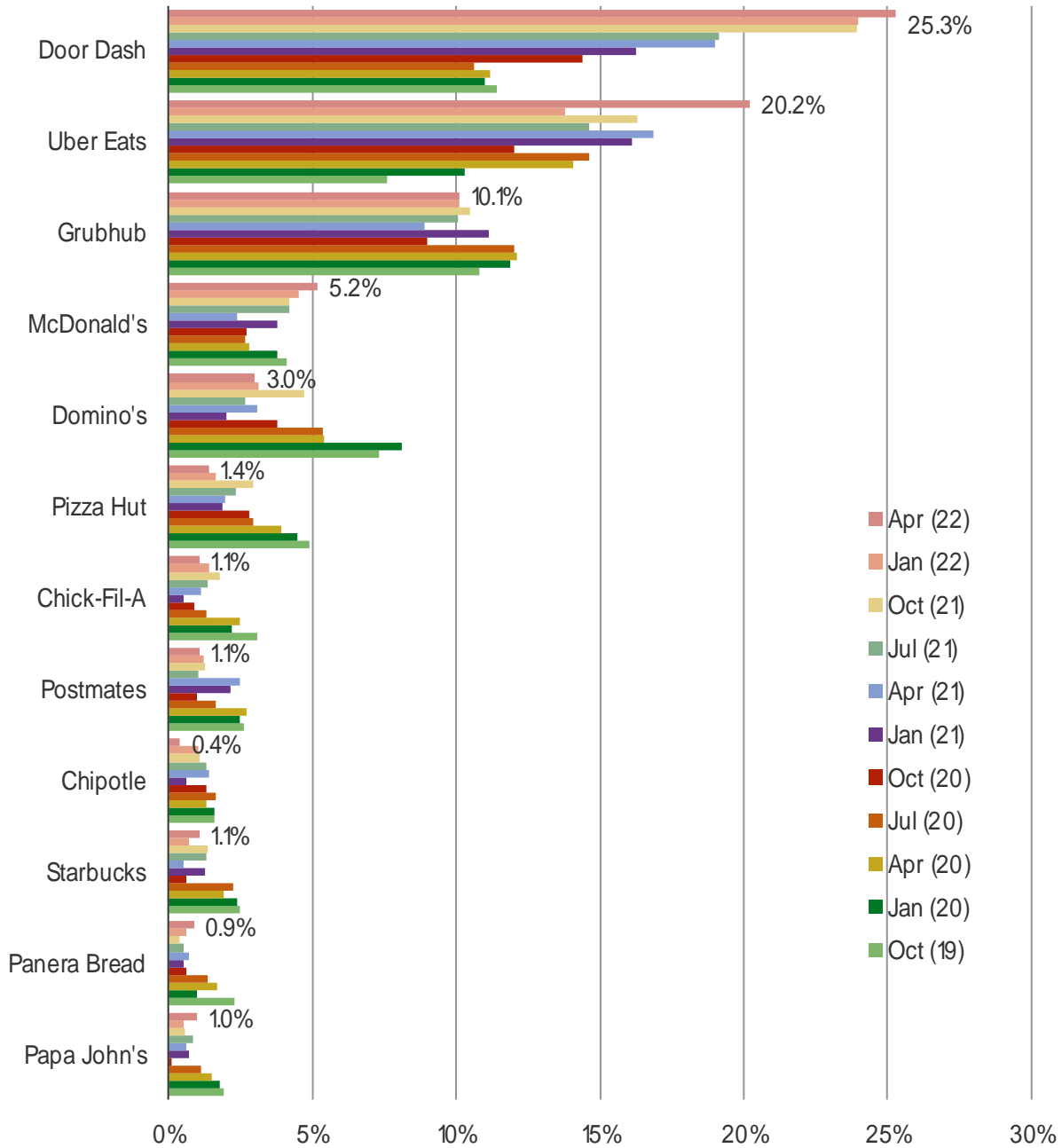
Food Delivery Apps

Audience: 1,000 US Consumers

Date: April 2022

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

Posed to respondents who use food delivery apps.



N = 1131

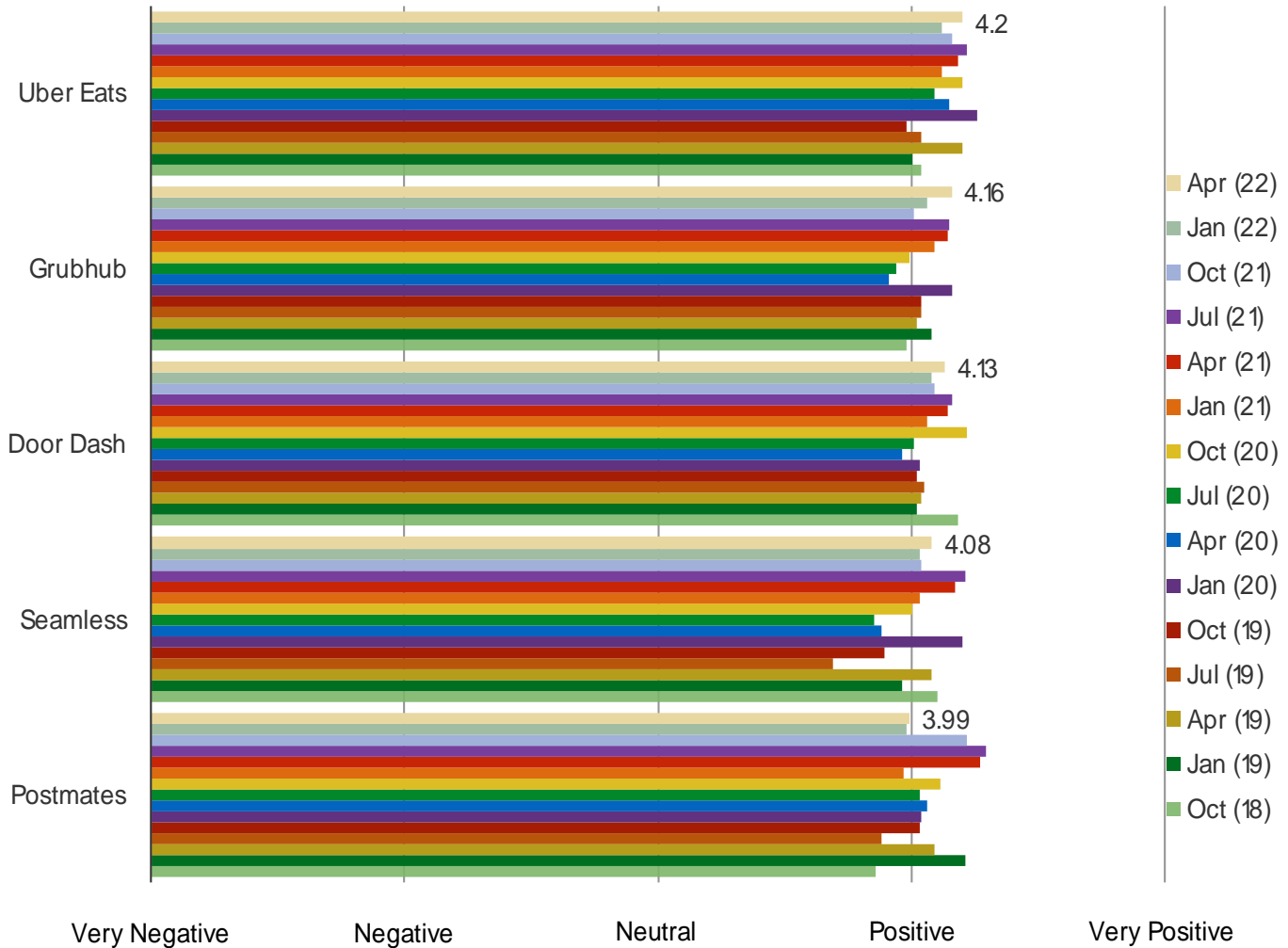
Food Delivery Apps

Audience: 1,000 US Consumers

Date: April 2022

WHAT IS YOUR OPINION OF THE PLATFORM?

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



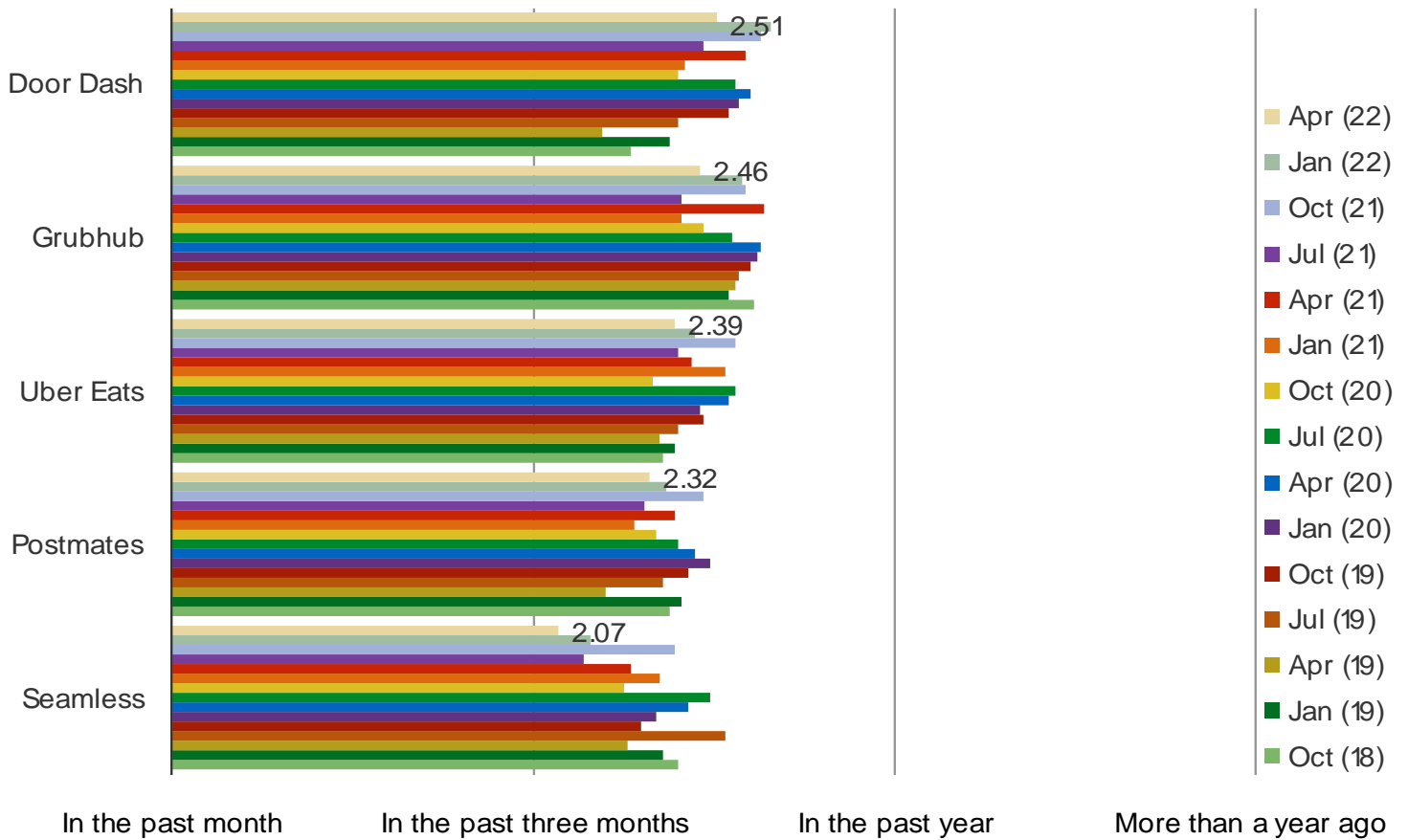
	N=
Uber Eats	413
Door Dash	523
Seamless	107
Grubhub	306
Postmates	161

Food Delivery Apps

Audience: 1,000 US Consumers  
Date: April 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	413
Door Dash	523
Seamless	107
Grubhub	306
Postmates	161

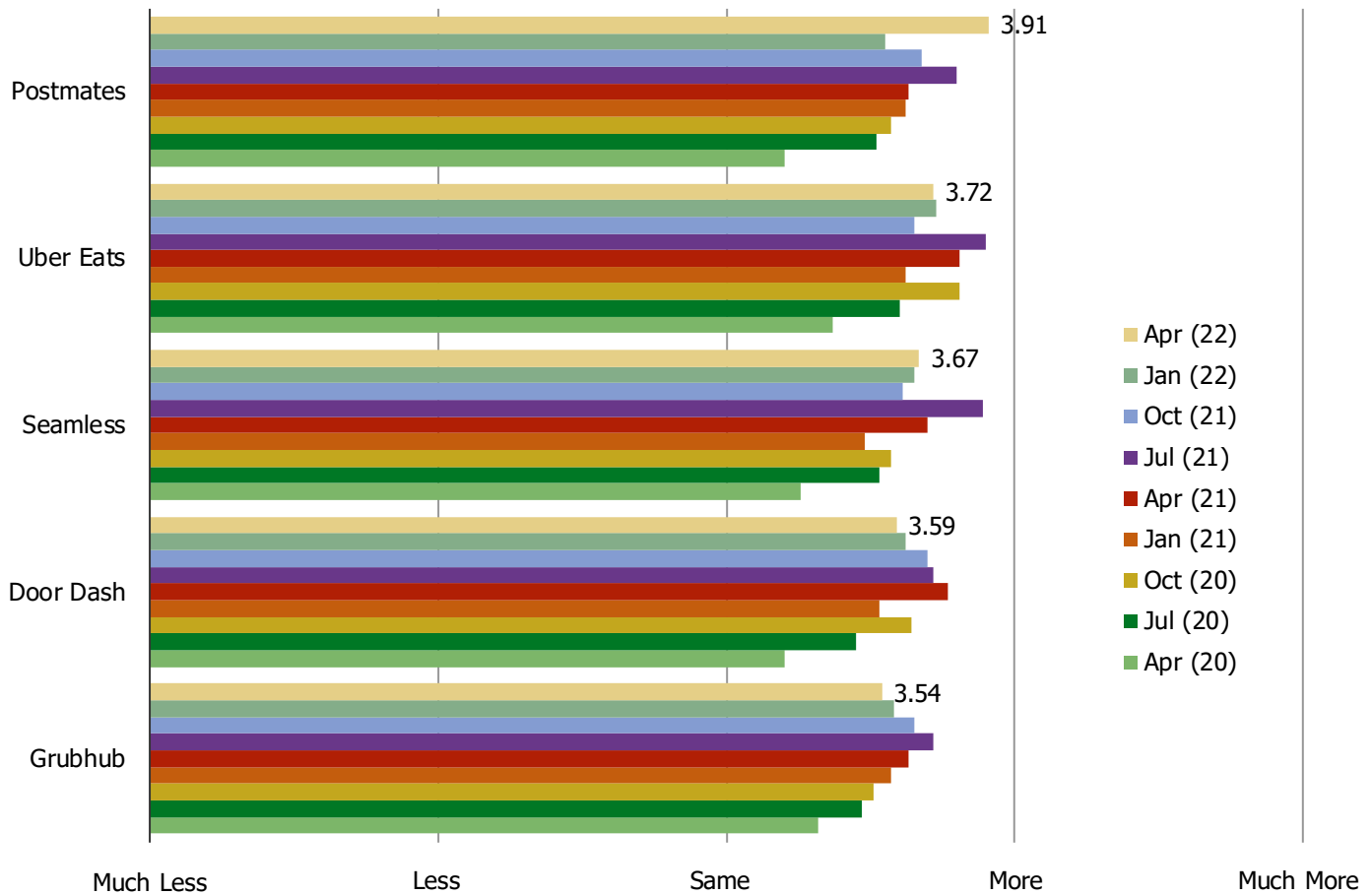
Food Delivery Apps

Audience: 1,000 US Consumers

Date: April 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	459
Door Dash	558
Seamless	138
Grubhub	355
Postmates	122

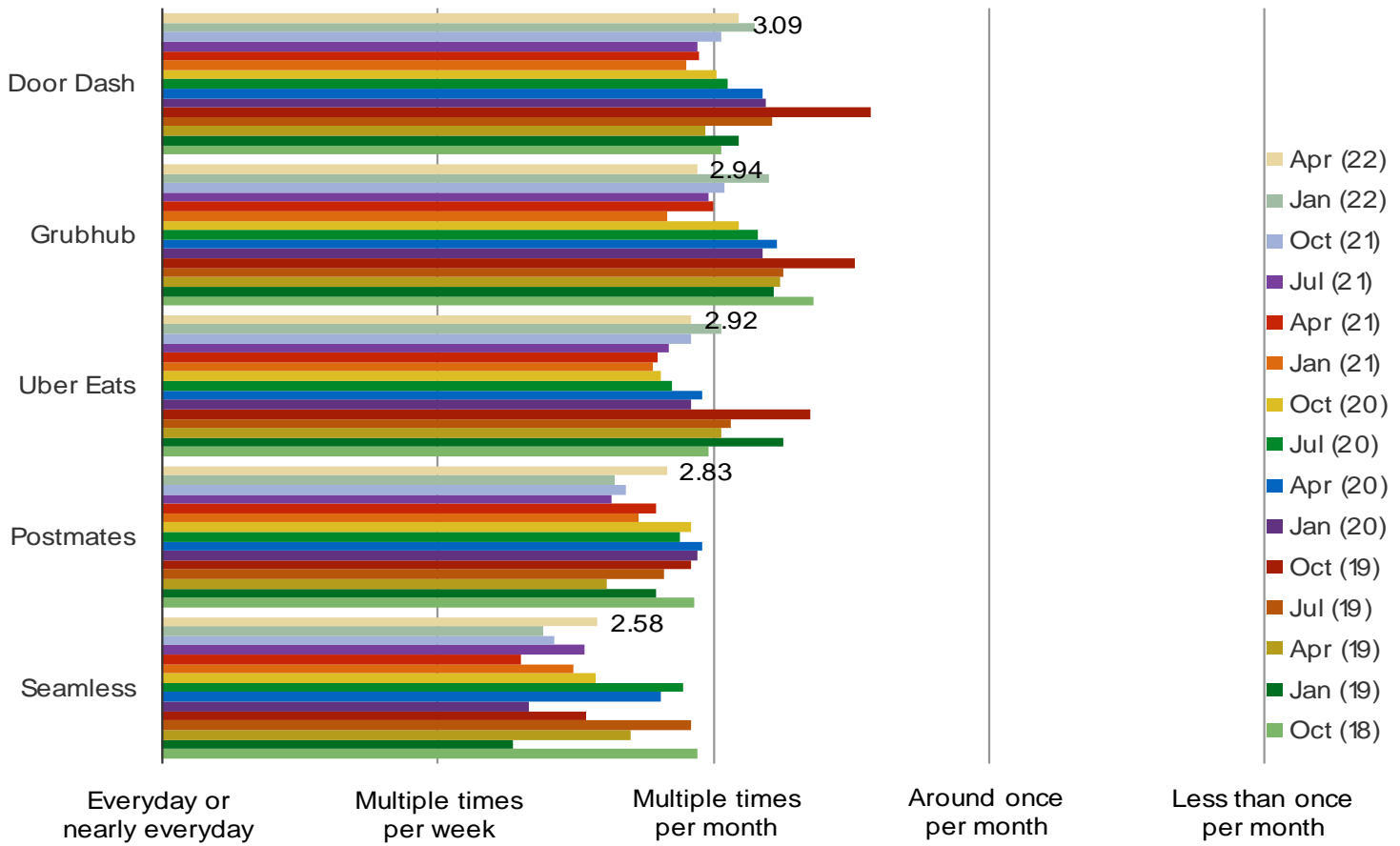


Food Delivery Apps

Audience: 1,000 US Consumers  
Date: April 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	413
Door Dash	523
Seamless	107
Grubhub	306
Postmates	161

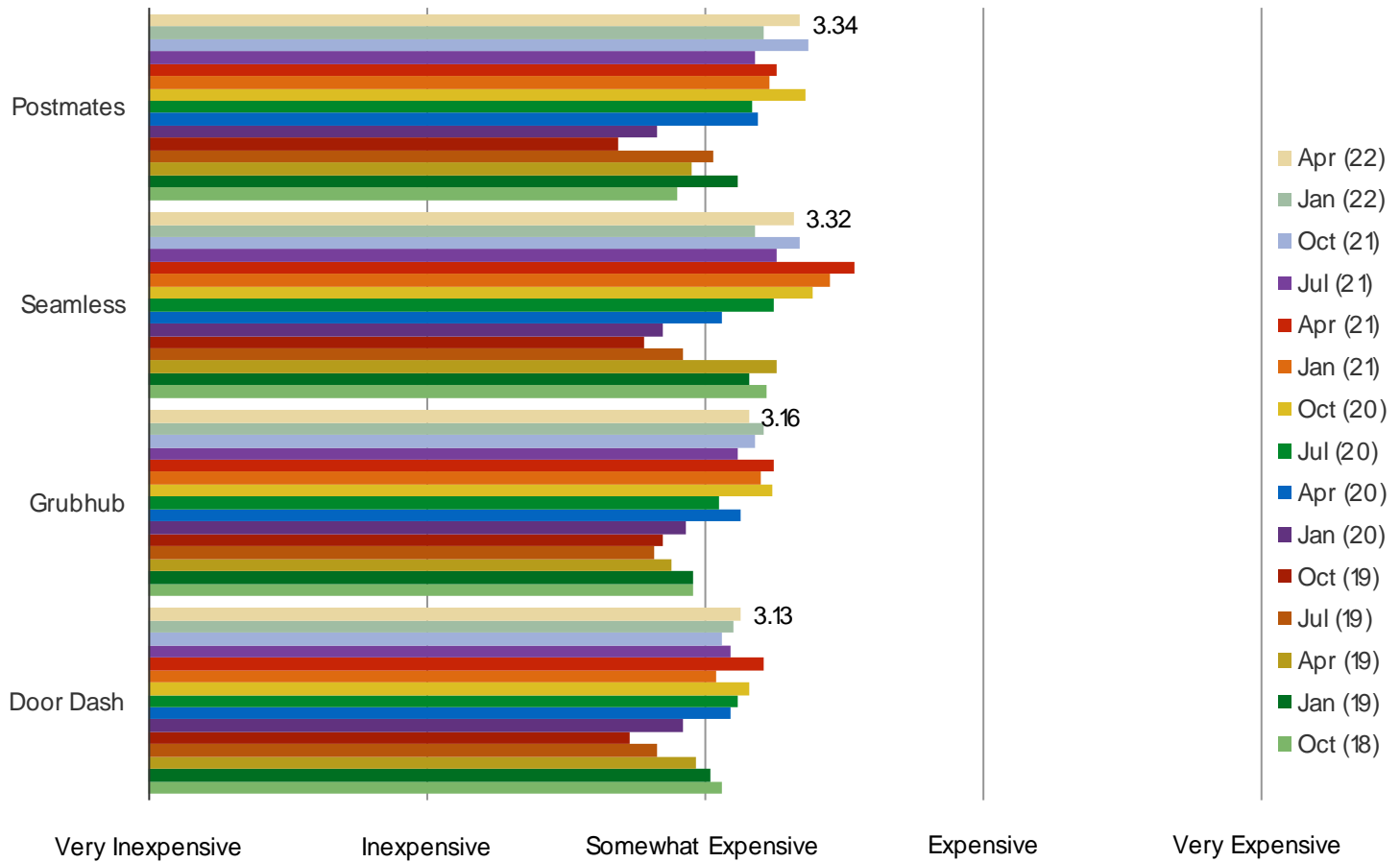
Food Delivery Apps

Audience: 1,000 US Consumers

Date: April 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.



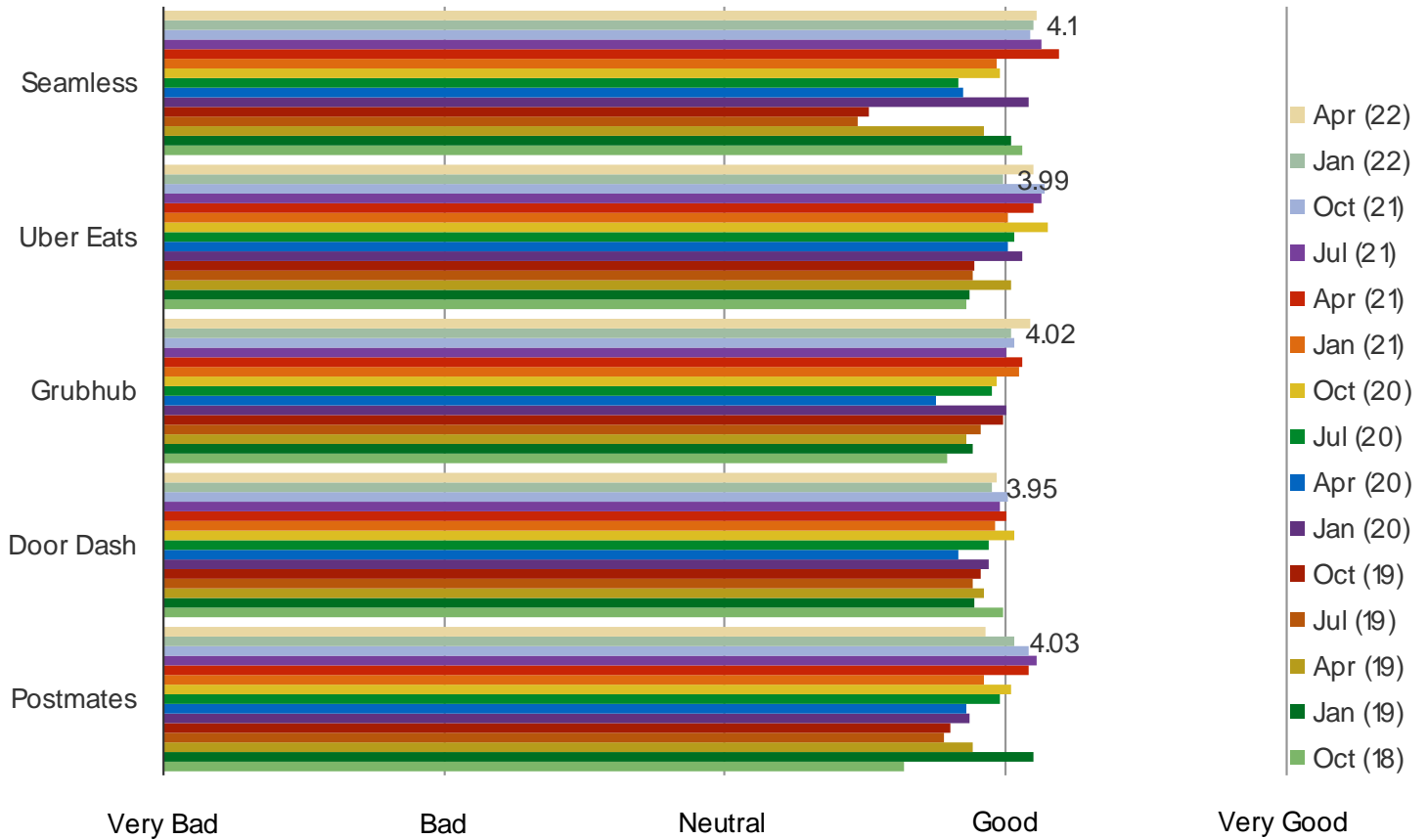
	N=
Uber Eats	413
Door Dash	523
Seamless	107
Grubhub	306
Postmates	161

Food Delivery Apps

Audience: 1,000 US Consumers  
Date: April 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	413
Door Dash	523
Seamless	107
Grubhub	306
Postmates	161

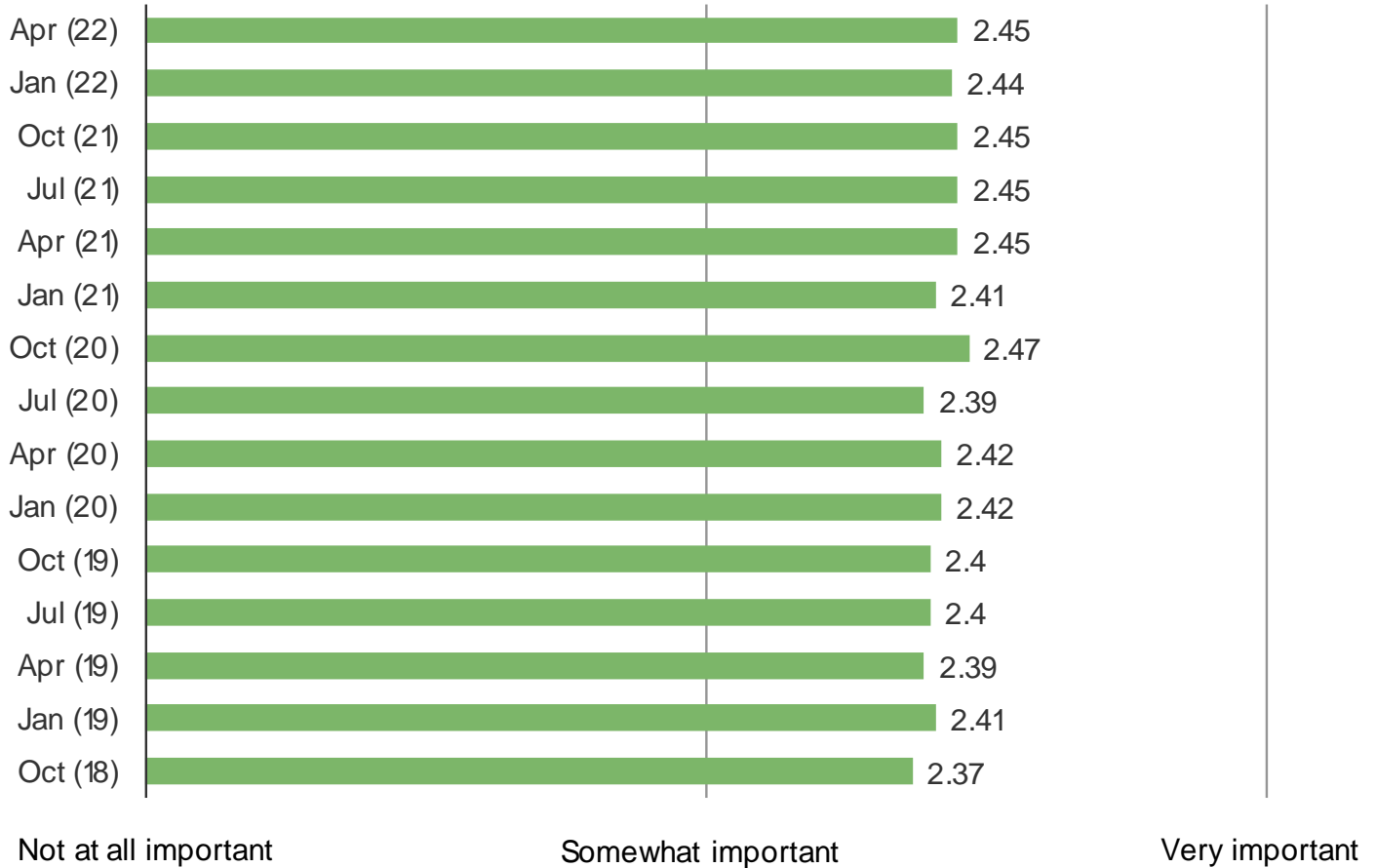
Food Delivery Apps

Audience: 1,000 US Consumers

Date: April 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?

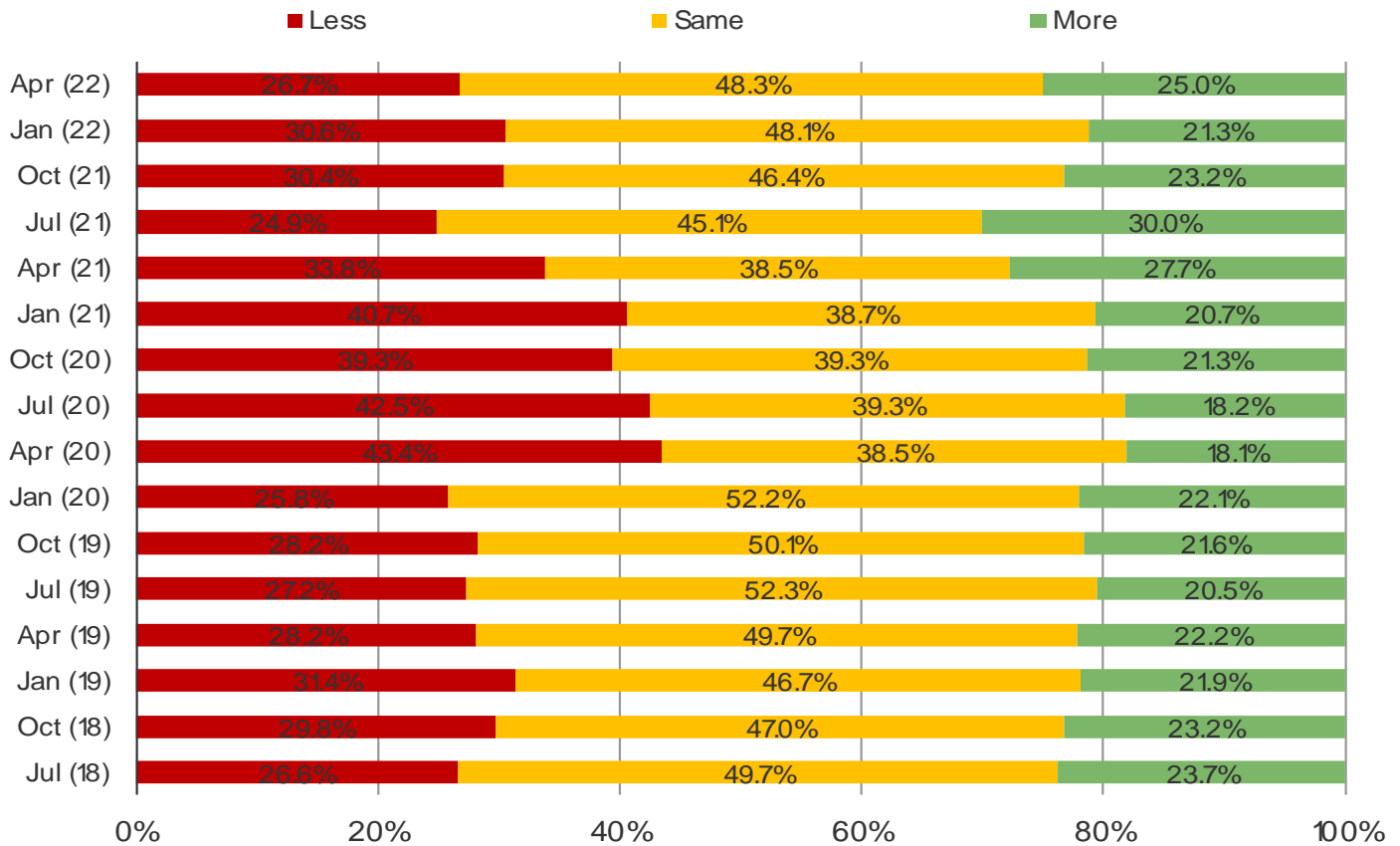
Posed to respondents who regularly or occasionally use each of the following apps.



## 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: April 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
Wingstop	27.07%	9.77%	38.35%	24.81%	133	2.61
Shake Shack	27.78%	14.44%	30.00%	27.78%	90	2.58
Cheddar's Scratch Kitchen	35.62%	12.33%	28.77%	23.29%	73	2.4
Ruby Tuesday	39.81%	8.74%	28.16%	23.30%	103	2.35
Pizza Hut	40.97%	9.49%	26.62%	22.92%	432	2.31
Red Robin	40.98%	11.48%	22.95%	24.59%	122	2.31
Papa John's	41.15%	11.15%	24.23%	23.46%	260	2.3
Cheese Cake Factory	40.63%	13.28%	23.44%	22.66%	128	2.28
Starbucks	44.51%	8.79%	25.27%	21.43%	364	2.24
Chipotle	41.09%	14.34%	24.03%	20.54%	258	2.24
Domino's	44.10%	9.40%	25.54%	20.96%	415	2.23
Buffalo Wild Wings	40.38%	11.54%	33.65%	14.42%	208	2.22
Chili's	43.22%	13.57%	22.11%	21.11%	199	2.21
IHOP	41.87%	14.29%	26.60%	17.24%	203	2.19
Appleby's	46.70%	8.02%	26.42%	18.87%	212	2.17
Panera	46.64%	11.66%	21.97%	19.73%	223	2.15
Popeye's	48.90%	8.20%	24.29%	18.61%	317	2.13
Chick-fil-A	47.93%	10.24%	26.14%	15.69%	459	2.1
KFC	48.17%	11.19%	23.29%	17.35%	438	2.1
Dunkin Donuts	48.95%	9.91%	24.62%	16.52%	333	2.09
McDonald's	49.94%	9.88%	23.84%	16.35%	881	2.07
Wendy's	50.72%	9.32%	24.19%	15.77%	558	2.05
Taco Bell	51.50%	9.14%	23.26%	16.11%	602	2.04
Burger King	52.63%	7.07%	23.68%	16.61%	608	2.04
Cracker Barrel	52.11%	11.05%	19.47%	17.37%	190	2.02
Longhorn Steakhouse	54.25%	10.46%	20.92%	14.38%	153	1.95
Sonic	52.94%	13.73%	20.39%	12.94%	255	1.93
Olive Garden	54.64%	12.91%	19.21%	13.25%	302	1.91
Texas Roadhouse	58.11%	8.56%	19.82%	13.51%	222	1.89

Food Delivery Apps

Audience: 1,000 US Consumers

Date: April 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
Cheddar’s Scratch Kitchen	57.89%	42.11%	38
Longhorn Steakhouse	50.00%	50.00%	54
Texas Roadhouse	48.65%	51.35%	74
Cheese Cake Factory	47.46%	52.54%	59
Ruby Tuesday	47.17%	52.83%	53
IHOP	46.07%	53.93%	89
Cracker Barrel	45.71%	54.29%	70
Red Robbin	44.83%	55.17%	58
Appleby’s	44.79%	55.21%	96
Dunkin Donuts	43.07%	56.93%	137
Buffalo Wild Wings	43.00%	57.00%	100
Starbucks	41.76%	58.24%	170
Chili’s	40.70%	59.30%	86
Shake Shack	40.38%	59.62%	52
Papa John’s	40.32%	59.68%	124
Chipotle	39.13%	60.87%	115
Popeye’s	38.97%	61.03%	136
McDonald’s	38.42%	61.58%	354
Pizza Hut	38.32%	61.68%	214
Wendy’s	38.12%	61.88%	223
Olive Garden	37.76%	62.24%	98
Panera	37.63%	62.37%	93
Burger King	37.14%	62.86%	245
Wingstop	36.90%	63.10%	84
Domino’s	36.79%	63.21%	193
Sonic	36.47%	63.53%	85
KFC	35.96%	64.04%	178
Taco Bell	33.33%	66.67%	237
Chick-fil-A	30.73%	69.27%	192



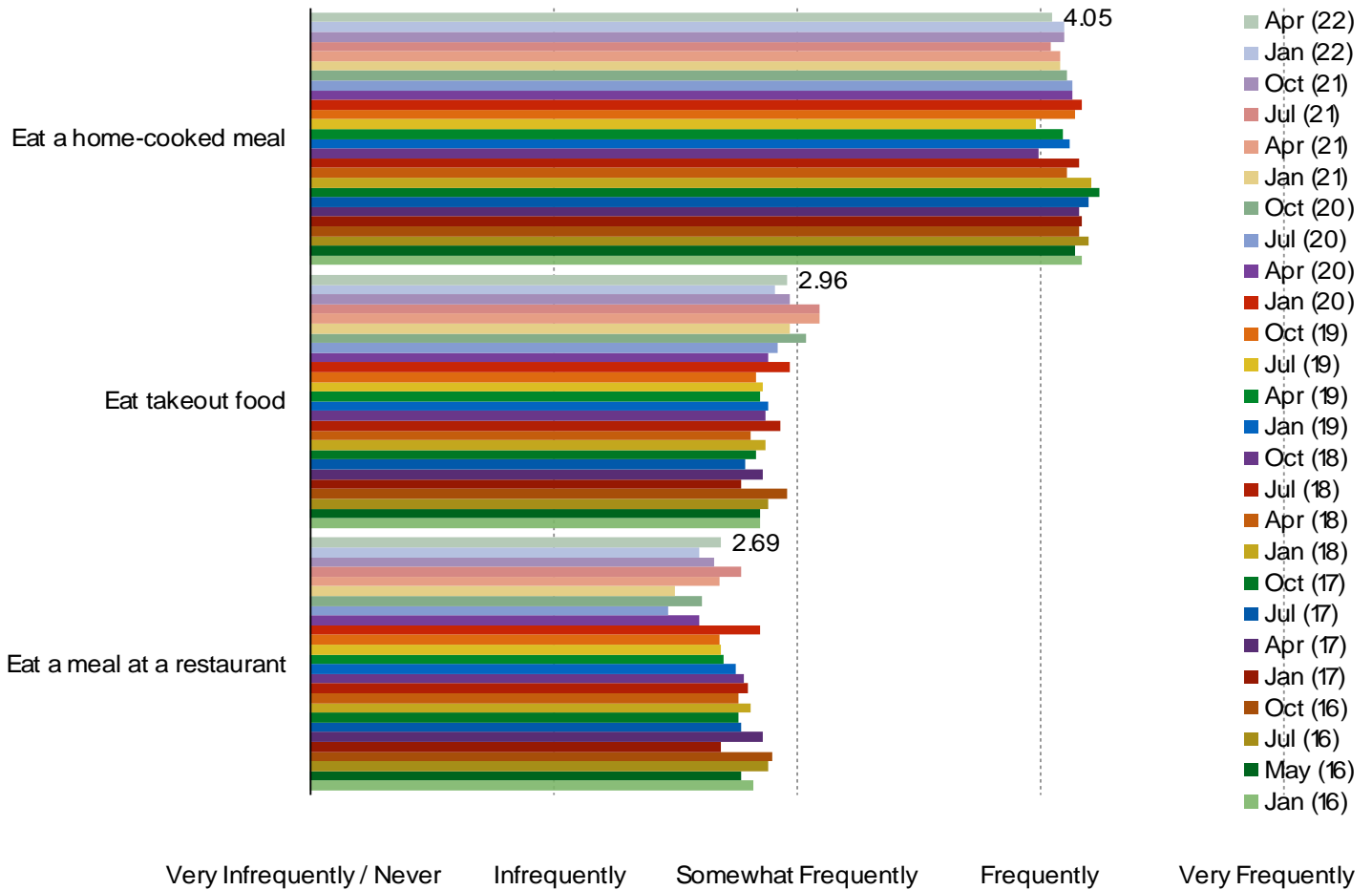
## CASUAL DINING OVERALL

Food Delivery Apps

Audience: 1,000 US Consumers  
Date: April 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.

